

## Individual Intake

Client's Full Name\* : \_\_\_\_\_

Age \* : \_\_\_\_\_ Today's Date \* : \_\_\_\_\_

Birthdate \* : \_\_\_\_\_ Home Phone \* : \_\_\_\_\_

SSN# \* : \_\_\_\_\_ Cell Phone : \_\_\_\_\_

Marital Status \* : \_\_\_\_\_ Work Phone : \_\_\_\_\_

Address \* : \_\_\_\_\_

\_\_\_\_\_

City \* : \_\_\_\_\_ State \* : \_\_\_\_\_

Zip \* : \_\_\_\_\_

Referred by : \_\_\_\_\_

Phone : \_\_\_\_\_

Employer or School (If Student) \* : \_\_\_\_\_

Emergency Contact Name \* : \_\_\_\_\_

Relationship \* : \_\_\_\_\_

Phone \* : \_\_\_\_\_

## Insurance Information

Insurance Company \* : \_\_\_\_\_

Name of Insured \* : \_\_\_\_\_

Insured's SSN # \* : \_\_\_\_\_

Insured's DOB \* : \_\_\_\_\_

Insured's Policy # \* : \_\_\_\_\_

Insured's Group # \* : \_\_\_\_\_

Insured's Employer \* : \_\_\_\_\_

Amount of Copays \* : \_\_\_\_\_

Insured's Relationship to Client \* : \_\_\_\_\_

Authorization # \* : \_\_\_\_\_

If your counseling is being paid for through an employee assistance program, please list authorization number and how many sessions are being authorized.

EAP Company: \_\_\_\_\_

Authorization #: \_\_\_\_\_

# of Sessions: \_\_\_\_\_

Have you called your insurance for pre-authorization? \*

Yes     No

If yes, list pre-authorization # / Name: \_\_\_\_\_

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[View Required Forms](#)

By clicking below you are acknowledging that you have been provided with and accept the following: \*

- Privacy Notice
- Confidentiality Policy
- Payment and Fee Information

Signature \* : \_\_\_\_\_

Date \* : \_\_\_\_\_