



Global Psychoeducational Solutions

Client Intake Form

Client Info

First Name

Last Name

Gender

Date Of Birth

Chronological Age

Current School

Primary Language

Grade

Race/ Ethnicity

Email Address

Place of Birth

Home Address

Parent 1 Info

Parent/Guardian Name

Age of Parent/Guardian

Email Address

Phone

Address

Country of Origin

Occupation

Highest Grade Completed

Siblings & their age

CONFIDENTIAL

“Unlocking potential in a modern world”



Global Psychoeducational Solutions

Client Intake Form

Parent 2 Info

Parent/Guardian Name	<hr/>
Age of Parent/Guardian	<hr/>
Email Address	<hr/>
Phone	<hr/>
Address	<hr/>
Country of Origin	<hr/>
Occupation	<hr/>
Highest Grade Completed	<hr/>

Early Developmental Information

Gestational Age	<hr/>
Birth Weight	<hr/>
Postnatal Difficulties	<hr/>
Developmental Milestones	<hr/>
<input type="checkbox"/> Crawled	<hr/>
<input type="checkbox"/> Walked	<hr/>
<input type="checkbox"/> First Words	<hr/>
<input type="checkbox"/> Phrases	<hr/>
<input type="checkbox"/> Toilet Trained	<hr/>
<input type="checkbox"/> Bedwetting	<hr/>

Medical/Mental Health Information

Any relevant medical conditions, medications, or allergies	<hr/>
Previous or current mental health services or diagnoses	<hr/>
Any significant life events or changes that may have impacted the client	<hr/>

CONFIDENTIAL

“Unlocking potential in a modern world”



Global Psychoeducational Solutions

Client Intake Form

Difficulties/ Impairments

- ☐ Vision _____
- ☐ Wears Glasses _____
- ☐ Hearing _____
- ☐ Speech Language _____
- ☐ Sleep _____
- ☐ Eating _____

Family History of Medical/Mental Health/Learning Problems

Describe client's overall behavior at home

Describe client's behavior with parents, siblings, and peers

What are clients strengths/interest/hobbies

CONFIDENTIAL

"Unlocking potential in a modern world"



Global Psychoeducational Solutions

Client Intake Form

Traumatic Events/Psychological Stressors

Has client been exposed to/affected by

- | | |
|---|---|
| <input type="checkbox"/> Victim of abuse | <input type="checkbox"/> Victim of crime |
| <input type="checkbox"/> Domestic/neighborhood violence | <input type="checkbox"/> Catastrophic events |
| <input type="checkbox"/> Bullying | <input type="checkbox"/> Homelessness |
| <input type="checkbox"/> Separation/divorce | <input type="checkbox"/> Family incarceration |
| <input type="checkbox"/> Serious family illness/death | <input type="checkbox"/> Other: _____ |

If yes to any, explain

Educational History

Describe client current school experiences, successful/unsuccessful interventions, strengths and challenges

Describe client previous school experiences, successful/unsuccessful interventions, strengths and challenges

CONFIDENTIAL

“Unlocking potential in a modern world”



Global Psychoeducational Solutions

Client Intake Form

When did difficulties begin?

Describe client's attendance?

Has client been retained

☐

Yes

☐

No

Early Developmental Information

Please rank each area of concern by order of significance

☐

Academic Functioning

☐

Executive Functioning

☐

Behavioral Functioning

☐

Social-Emotional Functioning

☐

Developmental Functioning

Check all that apply

Academic Functioning

☐

Poor grades or declining academic performance

☐

Struggles with specific subjects or concepts

☐

Lacks engagement or motivation in academic activities

☐

Reading difficulties, such as struggling to read fluently or comprehend written material.

☐

Writing difficulties, such as trouble expressing thoughts in writing

☐

Mathematics difficulties such as trouble understanding basic concepts and comprehending mathematical word problems

☐

Struggles to understand and follow multi-step instructions, often requiring repeated explanations

CONFIDENTIAL

“Unlocking potential in a modern world”



Global Psychoeducational Solutions

Client Intake Form

Executive Functioning

- ☐ Difficulty with organization and planning
- ☐ Poor time management skills
- ☐ Lack of impulse control
- ☐ Trouble with goal setting and follow-through
- ☐ Difficulty with information retrieval
- ☐ Inflexibility and difficulty with transitions
- ☐ May have challenges with self-control and emotional regulation
- ☐ Has trouble understanding and retaining information, both in written and verbal forms
- ☐ Takes longer than expected to complete tasks or respond to verbal or written information

Behavioral Functioning

- ☐ Engages in physical or verbal aggression towards others
- ☐ Frequently interrupts or disturbs others in class or social settings
- ☐ Shows difficulty following rules or instructions
- ☐ Displays excessive restlessness, fidgeting, or difficulty staying seated for extended periods
- ☐ Challenges authority figures
- ☐ Fails to follow through with instructions or requests, ignores rules
- ☐ Becomes easily frustrated

Social Emotional Functioning

- ☐ Difficulty forming and maintaining friendships
- ☐ Prefers to be alone and avoids social interactions with peers
- ☐ Experiences frequent and intense emotional ups and downs
- ☐ Low self-esteem or self-worth
- ☐ Displays excessive worrying or fearfulness
- ☐ Struggles to accurately identify and understand emotions in oneself and others
- ☐ Exhibits fear or anxiety in social situations
- ☐ Sensitivity to criticism or rejection
- ☐ Exhibits repetitive

CONFIDENTIAL

“Unlocking potential in a modern world”



Global Psychoeducational Solutions

Client Intake Form

Developmental Functioning

- ☐ Speech and language delays
- ☐ Displays difficulties with fine motor skills (e.g., handwriting, using utensils) or gross motor skills (e.g., running, jumping)
- ☐ Demonstrates heightened sensitivity or aversion to sensory stimuli
- ☐ Displays challenges in activities of daily living
- ☐ Exhibits challenges adapting to new situations or changes in routine
- ☐ Demonstrates difficulties with age-appropriate play skills, such as imaginative play, turn-taking, or engaging in cooperative play.

Additional Comments/Specific goals parents or guardians have for the assessment:

Office use only:

Respondent's Name:	Relationship to client:	Qualified Interviewer:

CONFIDENTIAL

“Unlocking potential in a modern world”