

Client Name:

Date:

Guardian Name:



Time:

Opening Conversation: A Guide for Therapy Intake

Beginning Topics

1. Discuss reason for referral/why you are calling & mention the referrer by name	<input type="checkbox"/>
2. Ask "What does treatment look like for you?". Explain the benefits of treatment and what it looks like in your agency/school -Discuss: therapist style and confidentiality	<input type="checkbox"/>

Specifics about the Child

1. Have you or your child ever been in treatment? How was your experience?	<input type="checkbox"/>
2. Discuss the diagnostic assessment	<input type="checkbox"/>
3. What could prevent you from coming to your initial appointment?	<input type="checkbox"/>
4. Discuss insurance coverage and cost of treatment	<input type="checkbox"/>

Scheduling

1. What is the best time for you to come in for an intake appointment? *Don't over emphasize appointment length -How do you plan to get to the appointment? Is it easier to meet at the client's home or somewhere besides school? -How soon do you feel your child needs to begin treatment?	<input type="checkbox"/>
2. Explain Open Access/ Walk-in hours	<input type="checkbox"/>
3. Explain if/when they will receive confirmation/reminder	<input type="checkbox"/>

Comments:

*Ask open ended questions *Review client information prior to the call *Conversation should be positive
*Place multiple calls to discuss all topics if necessary*Questions can be asked in any order