OFFICE USE : Date of Eval: Referred by:	_ Time:(start) (end)	CPT DSM DX	
SECTION I: TO BE COMPL Directions: Answer questions			T/GUARDIAN leave blank. Where appropriate just j	place an "X" in the \Box
Name of person completing for (Copy of Legal Custody Papers a	orm: re Requir	ed to be o file in this offi	$\frac{\text{Self } \Box Y \Box N}{\text{ice)} \ \Box Y \ \Box N} \text{Relationship to patient:}$	Legal Guardian □Y□N
PATIENT LEGAL NAME			SS# (last 4 digits Zip (N (*note: neither text nor email can insur	
Nickname	AG	E DOB	SS# (last 4 digits	5)
Complete Address			Zip	Code
Cell Phone	Eı	nail		
Do you give permission to cal	l/text □Y	$\Box N$; email you $\Box Y \Box N$	N (*note: neither text nor email can insur	e confidentiality)
			□Y □N Therapy Only □Y □N Seco	
Employment of Patient if appr Do you feel you are currently	opriate _	ccessful in workplace?	ong):? □Y □N □Not applicable	
Do you need any special accor Relationship Status (how man	being suc mmodation y times n	ons (Ex: extended test narried/divorced/signi	esNo Problematic Issues times etc) ficant other)	
Spouse/partner's name?		1 1	Preferred Prono	
Sexual Preference	G	ender Identification	Preferred Prono	un:
CHILDREN: NAME(S) D NONE	Age			Primary Residence
		Biological □Y □N A	Adopted $\Box Y \Box N$ at age	
		Biological □Y □N A	Adopted $\Box Y \Box N$ at age	
		Biological □Y □N A	Adopted $\Box Y \Box N$ at age	
SIBLINGS: NAME(S) D NONE	Age			Residence
		Biological □Y □N Add	opted $\Box Y \Box N$ at age	
		Biological □Y □N Add	opted $\Box Y \Box N$ at age	

Others living in the home:

Primary Healthcare Provider's Name

Approximate Date Last Physical: _____ Date of last lab work? _____

Phone

Do you have a release of information on file with your current therapist or healthcare provider to speak with me or share information electronically? $\Box Y \Box N \Box N/A$ ROI signed today $\Box Y \Box N$ for ______

Biological \Box Y \Box N Adopted \Box Y \Box N at age _____

PRENATAL AND DEVELOPMENTAL HISTORY (IF	PATIENT IS A MINOR)
Planned pregnancy \Box YNPrenatal care \Box YDNSpecify	
	ress or any physical or emotional trauma? $\Box Y \Box N$ Specify if $\Box Y \Box N$ Alcohol $\Box Y \Box N$ Drug use $\Box Y \Box N$ Specify bout your child's development? \Box Yes \Box No \Box Unsure
Does/Is your child: Walk without holding on? □Y Age learned; □N Use phrases to talk? □Y Age learned; □N	Use single words? \Box Y Age learned; \Box N Toilet trained? \Box Y Age learned; \Box N
Did your child ever lose skills he or she once had (for ex please describe:	ample, learned words then stopped talking)? Yes No; If Yes
Why are you here today? (Chief Complaint)	
	OW?
Regarding the reason you came today, please answer the	ne items below the best you can.
Onset: When did this problem first start? Location: Is there any particular place you feel this in yo	-
	Have you ever had this problem before? $\Box Y \Box N$ certain qualities to this problem or things that make it feel
Relieving Factors: Is there anything that makes it feel bet Time: How long does this problem usually last? I Is there any time of day it is better or worse? (Be as specif	s it off and on $\Box Y \Box N OR$ there all the time $\Box Y \Box N$
problematic: How would you rate this problem/discomfe	the best or least problematic and "10" being the worst or most ort today? 1-10 How would you rate it over the past 3 months? 1-10
PSYCHIATRIC SYMPTOMS CHECKLIST	N= NEW O=OLD C=CONTINUOUS R=RECURRING
□Anxiety □N □O □C □R □Fears □N □O □C □R □Worries □N □O □C □R	□Fidgety □N □O □C □R □Paranoia □N □O □C □R □Too much energy □N □O □C □R

Have you been treated in the past or are currently treated for this symptom? $\Box Y \Box N$ If past, how long ago?

□Too little energy

□Sleep too much

□Lack of Pleasure

□Sexual Concerns

Other:

Other:

 \Box Attention problems \Box N \Box O \Box C \Box R

 \Box Panic Attacks \Box N \Box O \Box C \Box R

 \Box Compulsions \Box N \Box O \Box C \Box R

 $\Box N \Box O \Box C \Box R$

 $\Box N \Box O \Box C \Box R$

 $\Box N \ \Box O \ \Box C \ \Box R$

 $\Box N \ \Box O \ \Box C \ \Box R$

 $\Box N \Box O \Box C \Box R$

 $\Box N \ \Box O \ \Box C \ \Box R$

□Depressed

□Moodiness

□Obsessions

□Agitation

□Irritability

□Insomnia

 $\Box N \ \Box O \ \Box C \ \Box R$

 $\Box N \Box O \Box C \Box R$

 $\Box N \ \Box O \ \Box C \ \Box R$

 $\Box N \ \Box O \ \Box C \ \Box R$

 $\Box N \ \Box O \ \Box C \ \Box R$

 $\Box N \Box O \Box C \Box R$

Have you had a positive or negative experience with therapy in the past?			
Past therapist $\Box Y \Box N$ Name:	Phone	ROI	$\Box Y \ \Box N$
Current Therapist DY DN Name:	Phone	ROI	$\Box Y \Box N$

Overall, on a scale of 1(low or worst)-10 (high or best) - in general how would you rate your "overall sense of well	l
being" today, over past 2-3 weeks, 2-3months, past year?	
When was the last time you felt "good"?	
What has changed since then and when?	

If you went to sleep tonight and woke up tomorrow and a "**Miracle**" happened that fixed everything for you, what would your life look like for you? What would be different?

If I had a magic wand what **ONE problem or symptom** would you like me to "fix or change for you **TODAY**?

If you had **any 3 wishes** what would they be?

*Please be as specific as possible on the Medical and Psychiatric Family History Sections.

Family *Medical* **History:** (i.e. heart disease, diabetes, high blood pressure, high cholesterol, cancer, asthma etc.) *Please note age and if still living. Directions: **Put an X in the box and specify under appropriate column**

MEDICAL HISTORY: FAMILY	CHILDREN	MATERNAL FAMILY (MOTHER, GRANDMOTHER, GRANDFATHER, AUNTS UNCLES, COUSINS)	PATERNAL FAMILY (FATHER, GRANDMOTHER, GRANDFATHER, AUNTS UNCLES, COUSINS)
Diabetes			
□ High Blood Pressure			
High Cholesterol			
□ Heart Attack			
□ Stroke			
Cancer			
□ Other			

Family *Mental Health* **History**: (i.e. depression, anxiety, panic, PTSD, alcoholism, drug addiction, bipolar (manic depression), schizophrenia, obsessive compulsive, dementia, alzheimer's, other) *Please note age and if still living. *(If you need more room please use back of this page)

PSYCHIATRIC	CHILDREN	SIBLINGS	MATERNAL FAMILY (MOTHER,	PATERNAL FAMILY (FATHER,
HISTORY:			GRANDMOTHER, GRANDFATHER,	GRANDMOTHER, GRANDFATHER,
FAMILY			AUNTS UNCLES, COUSINS)	AUNTS UNCLES, COUSINS)
Depression				
Anxiety				
□ Panic attacks				
□ Bipolar				
Schizophrenia				

PSYCHIATRIC	CHILDREN		PATERNAL FAMILY (FATHER,
HISTORY:			GRANDMOTHER, GRANDFATHER,
FAMILY		AUNTS UNCLES, COUSINS)	AUNTS UNCLES, COUSINS)
□ ADHD			
□ PTSD			
□ OCD			
□ Eating Disorders			
Schizophrenia			
□ Asperger's			
Autistic Spectrum			
 Addiction Substance Abuse Dependence 	-		
Borderline			
□ Other			
□ Hospitalized			

Personal Health: Psychiatric and General Medical Conditions and Medication History

CURRENT OR PAST PSYCHIATRIC CONDITIONS/DIAGNOSIS	PSYCH CONDITION Y IN NI 2.DONE IOP FOR PSYCH CONDITION(S) Y IN NI MORE THAN ONCE? Y IN I #TIMES WHERE DATE(S)	PERSONALITY DISORDERS OR TRAITS
	HOW LONG VOLUNTARY Y □ N □	
□ Depression □ Anxiety	\Box PTSD \Box OCD \Box Anorexia \Box Bulimia	Borderline Narcissistic
□ Panic attacks □Agoraphobia	Schizophrenia Psychotic disorder	□ Avoidant □ Dependent
□ Bipolar □ Post-partum dep	□ Asperger's □ Autistic Spectrum	Paranoid Histrionic
□ ADHD	\square Special learning needs $\square Y \square N$	Antisocial Schizoid
Tested for ADHD $Y \square N \square$		Schizotypal
by:		□ Obsessive compulsive
	Accommodations $\Box Y \Box N$ IEP $\Box Y \Box N$ 504Plan $\Box Y \Box N$	□ Personality change due to
	□ Addiction/Substance Abuse/Dependence	medical condition
Other:	□ Conduct disorder	
	Oppositional defiant	□ Other
	Reactive attachment	

History	y of Seizures	$Y \square N \square$	Head Injuries	$Y \square N \square L$	oss of Consc	iousness Y	Migraines Y□	I N□

Eating Disorders	(i.e. anorexia,	bulimia etc.) Y	/ 🗆 N 🗆 🔤 👘 👘	Specify:	

<u>ALLERGIES/SENSITIVITIES</u> : Are you allergic or sensitive to any medications that you know of $Y \square N \square$
List any medication(s) you are allergic or sensitive to:

Reaction(s)	$\underbrace{\qquad Other allergies Y \square N \square }$	$Latex Y \square N \square$	Epi-pen Y□ N□
-------------	--	-----------------------------	---------------

Vital Signs if indicated: Height_____Weight_____BMI____Waist Circumference_____Pulse_____B/P___

REVIEW OF SYMPTOMS		
General Health- No Problems Weight loss or gain Fatigue Weakness Fever or chills Trouble sleeping Head & Neck- No Problems Headache	Eyes- No Problems Vision Loss/Changes Glasses or contacts Pain Redness Flashing lights Specks Glaucoma Cataracts Blurry or double vision Neurologic- No Problems Dizziness Fainting	Endocrine- No Problems Head or cold intolerance Sweating Frequent urination Thirst Change in appetite Skin- No Problems Rashes Lumps
□ Neck Pain □ Lumps □ Pain □ Stiffness □ Swollen glands	□ Seizures □ Weakness □ Numbness □ Tingling □ Tremor	 □ Itching □ Dryness □ Color changes □ Hair and nail changes
Ears- Do Problems Decreased hearing Ringing in ears Earache Drainage	Nose- No Problems Stuffiness Discharge Itching Hay fever Nosebleeds Sinus pain	Hematologic (Blood Issues)- No Problems Ease of bruising Ease of bleeding
Throat- No Problems Bleeding Dentures Sore tongue Dry mouth Sore throat Hoarseness Thrush Non-healing sores Breasts- No Problems Lumps Discharge Self-exams Breast-feeding Musculoskeletal- No Problems Muscle or joint pain Stiffness Back pain Joint Redness Swelling Trauma	Respiratory- No Problems Cough Sputum Coughing up blood Shortness of breath Wheezing Painful breathing Cardiovascular- No Problems Chest pain/discomfort Tightness Palpitations Shortness of breath with activity Difficulty breathing lying down Swelling Sudden awakening from sleep with shortness of breath	Vascular- No Problems Calf pain with walking Leg cramping Gastrointestinal- No Problems Swallowing difficulties Heartburn Nausea Rectal bleeding Constipation Diarrhea Yellow eyes or skin Change in appetite Change in bowel habits Urinary- No Problems Frequency Urgency Burning or pain Blood Incontinence Change in urinary strength
Other:	Other:	Other:
Past Surgery: Specify type/age	Past Surgery: Specify type/age	Past Surgery: Specify type/age

TRAUMA HISTORY & ADVERSE CHILDHOOD EXPERIENCES (ACE) Have you ever experienced any of Agency report					
the traumas listed below? *Please be specific and note age and duration of trauma event and if still occurring.			Name of contact, results, & ref #'s		
Some of these may	Some of these may be occurring now or when you were a child.			results, α ref # s	
			Duration of Abuse		
Physical Neglect	□ Y □ N	Age started	Duration of Abuse	Still Occurring DY DN	
			Duration of Abuse	Still Occurring DY DN	
Emotional Neglect	□ Y □ N	Age started	Duration of Abuse	Still Occurring DY DN	
Sexual Abuse	□Y □N	Age started	Duration of Abuse Duration of Abuse	Still Occurring DY DN	
Bullying	□Y □N	Age started	Duration of Abuse	Still Occurring DY DN	
Other	□ Y □ N	Age started	Duration of Abuse	Still Occurring PY N	
Experienced or witnessed violence in family □ Y □ N Age started Duration of Abuse Still Occurring □ Y □ N Specifics					
Family Member Incarcerated D Y D N Hospitalized D Y D N Relationship					
Age of pt at time Duration of incarceration/hospitalization					
Current relationship 🗆 Y 🗆 N Specify					
Alcohol or drug abuse in household \Box $Y \Box$ N Age started Duration of Abuse Still Occurring \Box $Y \Box$ N					
Other:					

PAST psychiatric medications (name/dose/how long were you on/for what condition/ who prescribed/ what was positive or negative effects of this med)?

<u>All CURRENT Prescribed PSYCH Medications (dose/how long have you been on med/for what condition/ who</u> prescribed/what has been the benefit or adverse effects)?

<u>All CURRENT Prescribed NON-PSYCH Medications (dose/how long have you been on med/for what condition/ who</u> prescribed/what has been the benefit or adverse effects)?

<u>Current use of herbal remedies/VITAMINS/or dietary supplements</u> (dose/duration/reason for taking)

Describe Current Family/Social History: (current living situation, any legal/work/school or other issues)

On a scale of 1(low) to 10 (high) how willing are you to take action to change some things in or for yourself in order to feel better? _____ Do you have any ideas what would be helpful to change? ______

Is there anything else you feel is important for the psychiatric provider to know about you or your situation in order to best help you? (Any secrets you have been afraid to share about what is going on with you?) Any fears about discussing what is going on with you?)

<u>Section II:</u>

Sleep Hygiene: easy to fall asleep $\Box Y \Box N$; stay asleep $\Box Y \Box N$; early am awakening $\Box Y \Box N$; How do you get to sleep(bedtime routine)

Appetite: \Box No problem Intentional Weight Gain \Box Y \Box N; Intentional Weight Loss \Box Y \Box N Over what period of time did weight gain or loss occur?

Physical Energy: □No problem □ Exhausted (hard to do what needs to be done) □High Energy (plenty of energy to get things done) Specify______

Mental Energy: DNo problem D Exhausted (hard to do what needs to be done) DHigh Energy (plenty of energy to get things done) Specify_____

Pleasure: (what do you do for fun? when is the last time you did something for fun? Do you have best friend/ friends?)______

Sex: Sexually active $\Box Y \Box N$; Desire $\Box Y \Box N$; Pleasurable $\Box Y \Box N$; Pain with intercourse $\Box Y \Box N$;
Ability to orgasm $\Box Y \Box N$; Masturbate $\Box Y \Box N$; Any concerns?Possibly pregnant $\Box Y \Box N$; Last PeriodMenopause $\Box Y \Box N$; PMS $\Box Y \Box N$; Andropause (males) $\Box Y \Box N$

Cognitive Functioning: Difficulties with concentration $\Box Y \Box N$; Focus $\Box Y \Box N$; Memory, $\Box Y \Box N$; Decision making $\Box Y \Box N$; Reading $\Box Y \Box N$;

RISK ASSESSMENT: Violence toward self/others/objects/places

SUICIDE	HOMICIDE/VIOLENCE	SELF HARMING BEHAVIORS
Ideation - Plan - Previous Attempt	□ Ideation □ Plan □ Previous Attempt	□ Cutting
□ Weapons □ Access	□ Weapons □ Access	Burning
Passive thoughts of death/dying	Specify	Branding
	□ Assault of another	□ Other
Specify	Destruction of property	
	Specify	Specify
If you should ever think about suicide	If you should ever think about harming	
what would stop you from acting on it?	someone else what would stop you from	
	acting on it?	
Comment/quotes:	Comment/quotes:	Comment/quotes:

Have you ever destroyed property of self or someone else? \Box Y \Box N Specify_____

Do you have a safety plan: \Box Y \Box N Specify_____

Resources Available: Dramily Driends Community Church Dispiritual Other

Spiritual Beliefs/Religious Affiliation:

Therapist's Notes:

SUBSTANCE USE / ABUSE / DEPENDENCE HISTORY -*Current and past use of non-prescription or prescriptiondrugs/substances (legal or illegal)FOR ALL USED, LIST AGE STARTED AND STOPPED & IF PAST OR CURRENTUSE.*Mark "X" in the DC DP by each substance.**Write in any substances used not listed.

SUBSTANCES - PRESCRIPTION OR NON-PRESCRIPTION	
 □ NICOTINE (cigarettes, gum, patches) age started amount used/day □C □P □ TOBACCO (other than cigarettes) age started amount used/day 	□ COUGH SYRUP ageamtfreq □C □P □ TRIPLE C ageamtfreq □C □P □ ROBITUSSIN ageamtfreq □C □P □ DXM ageamtfreq □C □P
	□ NYQUIL ageamtfreq□C □P Other Meds:
\Box ALCOHOL age started amount used/day $\Box C \Box P$	
□ CAFFEINE (coffee,tea,mountain dew,red bull,energy drinks) age started amount used/day □C □P	Related to any past or current use have you experienced any of the following: 1. Ever charged for any drug-related offenses $\Box Y \Box N$
□ POT (marijuana) age started amount used/day □C □P □ COCAINE age started frequency □C □P	Specify 2. Served time in jail/prison □Y □N Specify
$\Box \text{ METH age started } _ \text{ Inequency } _ \Box C \Box P$	Specify 3. Overdosed DY DN Specify
$\Box \text{ ECSTASY /}\Box \text{ MDMA age started } \underline{\qquad} \text{ frequency } \Box C \Box P$	 4. Any negative consequences or losses □Y □N Specify
LSD age started amount used/day $\Box C \Box P$	alcohol or substance use? $\Box Y \Box N$ Specify
□ MUSHROOMS age started frequency □C □P	6. Have any friends/family ever told you they were worried about your alcohol or substance use? $\Box Y \Box N$
□ STIMULANTS (speed)/adderall/ritalin/vyvanse/provigil age started amount used/day □C □P	Specify 7. Have you ever tried to stop using alcohol or substances? □Y □N Specify
□ PAIN PILLS (oxycontin, opana, lortabs, percocets, vicodin) age started amount used/day □C □P	8. Hospitalization/Rehab/Detox DY DN (Details)
□ BENZO'S (xanax-zanni bars/footballs)/ Klonopin (k-pins/valium/ativan/ age started amount used/day □C □P	T1
□ SLEEPING PILLS (ambien, restoril) age started amount used/day	Therapist's notes:
□ OTHER SYNTHETICS (spice, kratom, molly, other) age started amount used/day □C □P	
□ HEROIN □ MORPHINE/□DEMEROL □ DILAUDID age started amount used/day □C □P	
□ METHADONE □ SUBOXONE □ SUBUTEX age started amount used/day □C □P	

<u>**STOP HERE****</u>** The following section will be completed by the evaluator

What question(s) should I have asked that I did not?

SCREENING TESTS	/SCORES:	MDQ□	Depression:Pl	HQ9□ Zun	lg□ SAD(gero)□	Edinburgh Post-Natal
Yale-Brown OCD□						
Other□						

 Labs- □reviewed□ ordered □CBC □CMP □HbA1C □Thyroid w/TPO □Lipid Panel □Vit D □B12 □Folate

 □Ferritin □CRP □Homocysteine □Creatinine □Beta Hcg □PSA □Free & Total Testosterone □DHEA-S

 □Progesterone □Estradiol(E2) □Lithium □Depakote □Tegretol _____ □EKG □EEG □CT SCAN □MRI_____

 □Sleep Study □UA □UDS □7 □12 Panel OTHER ______ Directions for fasting or drug levels given □Y □N

<u>MENTAL STATUS EXAM</u>	<u>MENTAL STATUS EXAM</u>	RISK ASSESSMENT SUMMARY	
Appearance-	Affective Expression-	Preoccupations	
□ Casual dress, normal	□ Full range displayed - appropriately		
grooming & hygiene Other	□ Mood congruent □Labile □Depressed □Tearful	Suicidal Ideation Done Currently	
Attitude/Response to Rapport-	□ Constricted □Blunted □Flat □Superficial □Other		
□ Calm & cooperative	Mood-	□ Previous attempt/s	
□ Easily engaged □Hostile	□ Euthymic □Anxious □Irritable □Angry	□ Current ideation	
□ Uncooperative □Other	□ Depressed □Elevated □Anhedonic □Other	Impulsiveness	
Behavior-	Thought Process/Form-	□ Viable plan	
□ No unusual movements or	□Goal-directed/Logical □Disorganized □Other	Available means	
psychomotor changes \Box Other	Thought Content-	□ Settling of affairs	
Speech-	Suicidal ideation None Passive Active		
□ Normal rate/tone/volume/	If Active: \Box Plan \Box Intent \Box Means	Hostile Intent DNone Currently	
□ Pressured □Loud □Soft	Homicidal ideation ¬None ¬Passive ¬Active	Previous intimidation	
Monotone Slurred Poverty	If Active: \Box Plan \Box Intent \Box Means	History of violence	
	Specify if Duty to Warn: DY DN	Current intent	
Orientation- □Oriented X3	□ Delusions □Paranoia □Phobias □Perseveration	Impulsiveness	
□ Other	□ Obsessions/compulsions □Grandiosity	🗆 Viable plan	
Memory/Concentration-	□ Flight of ideas □Other	Available means	
□ Short Term Intact	Perception-		
Long Term Intact	□ No hallucinations or delusions during interview	Other risk factors such as alcohol or	
Distractible/Inattentive	Dissociation Depersonalization Other	substance use:	
□ Other	Intelligence-		
Insight/Judgment-	□ Appears WNL for age/education □Other:		
□ Good □ Fair □ Poor	Notes:	Intervention:	
Impulse Control-			
□ Good □ Fair □ Poor			

CURRENT DIAGNOSTIC IMPRESSION/PROVISIONAL DIAGNOSIS/ INCLUDE DIFFERENTIAL DIAGNOSIS:

Plan for treatment: (Therapy and Medications):
Individual
Family
Couples
Group

Currently prescribed any controlled substance(s) $\Box Y \Box N$ By other provider $\Box Y \Box N$ KASPER $\Box Y \Box N$ Specify:

Medication(s) Started/Recommended:

Medication Plan Discussed DY DN DN/A Usefulness of Medication and Possible Side Effects Reviewed DY DN DN/A Handout Given $\Box Y \Box N$ WebMd.com $\Box Y \Box N$ Other ______ Consent for off label (Age) $\Box Y$

PLAN for next appt: DLife event timeline DChild self pic DLetter writing Past/Present/Future Journal Music □Photography □Collage □Art □Energy Release □None at this time Other _____

Other Referrals Given:
Psych Testing
PCP/Specialist
Other_____ Were goals of this initial appointment met? $\Box Y \Box N$ Follow-up Appt: _____ Therapist's Notes: Miscellaneous:

 Evaluation Completed By
 Date