THE CLIENT HISTORY FORM

Before we begin our work together, I'd like you to fill out a brief questionnaire called a Client History Form. This form is designed to help me get to know you and understand the reasons you're seeking help right now. It includes questions about your current challenges, your personal and family history, your health, and any experiences that may be affecting you.

You may have already completed the client history form before the therapy program and treatment plan (this document) was reviewed. This form is sent to collect information about your presenting issue and relevant biopsychosocial history. Once completed, the submitted form will be available in your medical chart and the information submitted on the form can be used to populate related fields on the Intake Note using the History button.

Below is an overview of what you can expect to be asked:

1. **Current Concerns:**
    - You'll be asked about what brought you to therapy and what you hope will change or get better.
2. **Background on the Issue:**
    - You'll describe when your concerns started, how often they happen, and how they impact your life.
3. **Previous Mental Health Experience:**
    - If you've faced challenges like this before, you can share what that was like and whether you received any help.
4. **Family History:**
    - You'll be asked if anyone in your family has experienced mental health or substance use issues, what happened, and how it affected you.
5. **Medical History:**
    - You can let me know about any medical issues you have or have had in the past, and if you've seen a healthcare professional for them.
6. **Medications:**
    - If you currently take any medications, you'll list what you take, how often, and who prescribes them.
7. **Substance Use:**
    - You'll be asked if you've used alcohol, tobacco, or other substances (including prescription medications outside of their intended purpose).

8. **Family and Relationships:**
    - You can tell me about the people closest to you—your family and other important relationships—and what those relationships are like.
9. **Social Activities and Supports:**
    - We'll explore the social parts of your life—any clubs or groups you're part of and how you spend time with others.
10. **Spiritual and Cultural Influences:**
    - If you identify with a particular faith, spiritual tradition, or cultural community, you can share what that means to you.
11. **Childhood and School Experiences:**
    - You'll have the chance to describe what growing up was like, including home life, school experiences, and friendships.
12. **Education and Work:**
    - This section asks about your highest level of education, job experiences, or volunteer work you've done.
13. **Legal Issues:**
    - If you've ever been arrested or involved in legal matters, you'll have a space to share that information.
14. **Strengths, Needs, and Preferences:**
    - I'll want to know what skills and strengths you bring to therapy, as well as any preferences or needs you have that might help us be successful together.
15. **Anything Else to Know:**
    - Finally, there's a general question for you to share anything else you feel is important about your situation or your life.

How this information helps:

- Everything you share gives me a clearer picture of who you are, the experiences you've had, and the goals you'd like to work on.
- I will keep this information confidential and only use it to provide you with the best possible support.

Practical details:

- You'll be able to access the questionnaire in our secure patient portal. Your answers will be stored safely and become part of your record with me.
- After you submit the form, I can use the information to help guide our sessions and make sure we focus on what's most important to you.

Therapy Notes LLC. Integrated AI

The software includes a built-in AI tool designed to help organize and summarize the information you share on the Client History Form. Here's how it works:

Collecting Your Information:

After you complete the Client History Form in our secure portal, all of your responses are compiled into your digital chart.

AI-Generated Summaries:

The software uses artificial intelligence to read your answers and create a short summary of the most important points—such as your main concerns, relevant background details, and key themes.

This summary is automatically attached to your chart so we can both see a concise overview of what you've shared.

How It Helps Your Care:

These summaries save time by letting me quickly review your situation before and between sessions.

They also help ensure I don't miss any crucial details when planning the best approach to support you.

Confidentiality and Security:

Only authorized staff can see this information.

The AI does not share your data with any outside service; it simply processes it within a secure system. The software company and my practice both maintain strict confidentiality standards, so you can feel comfortable knowing your personal details are protected.

Customizing Your Treatment:

By using the AI's summary alongside your full responses, I can adapt our sessions more precisely to your needs and goals. The summary acts as a guide, but I'll still rely on your detailed answers and our ongoing conversations to fully understand your experiences and preferences.

Thank you for taking the time to complete the form and for trusting this process. The AI summaries are just one way we ensure you receive the most efficient, personalized care possible. If you have any questions about how the AI works, please feel free to ask!