

CASE MANAGEMENT INTAKE FORM

Client Name: _____ Client ID: _____

Personal Information:

Date of Birth: _____ Gender: _____

Address: _____

Phone Number: _____ Email Address: _____

Emergency Contact Information:

Name: _____

Relationship: _____

Phone Number: _____

Referral Source:

Referral Type: _____ Referral Name/Agency: _____

Presenting Problems / Reason for Referral:

Current Medications:

Allergies:

Medical History (Please check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> Diabetes | <input type="checkbox"/> Hypertension |
| <input type="checkbox"/> Heart Disease | <input type="checkbox"/> Asthma |
| <input type="checkbox"/> Seizures | <input type="checkbox"/> Cancer |
| <input type="checkbox"/> Substance Abuse | <input type="checkbox"/> Mental Health Diagnosis |
| <input type="checkbox"/> Surgery History | <input type="checkbox"/> Other (specify): _____ |

Please provide any previous mental health diagnoses, hospitalizations, counseling or therapy history, and relevant information.

Substance Use History:

Describe any use of alcohol, tobacco, prescription medications, and recreational drugs, including frequency and last use.

Social History:

Include marital status, living arrangements, employment, education, support systems, and any legal history.

Goals of Treatment / Client Expectations:

Authorization and Consent:

I hereby consent to receive case management services and understand that my information will be kept confidential except where disclosure is required by law. I acknowledge that I have the right to withdraw consent at any time by notifying the case manager in writing. I understand that case management services do not include emergency care and that, if necessary, I will seek emergency services separately.

CLIENT SIGNATURE

CASE MANAGER SIGNATURE

Signature: _____

Signature: _____

Original source of this document:

<https://formdocs-us.com/case-management-intake-form/>

Did you find this template helpful?

Find more updated templates at:

<https://formdocs-us.com/>

[View more templates](#)

This template is intended exclusively for personal, non-commercial use.
If distributed or published, the source must be mentioned.

This template is provided for guidance only and does not constitute legal advice.
It is recommended to consult a legal professional for each specific case.