



# A Guide for New and Beginning Counselors: Mastering the Art of Intakes

As a new or beginning counselor, conducting effective intake sessions is a crucial skill to develop. The intake process sets the foundation for your therapeutic relationship with clients and helps you gather essential information to guide your treatment approach. Here's an informational piece to help you navigate this important aspect of counseling.

## Understanding the Purpose of Intakes

The primary purpose of an intake session is to gather comprehensive information about the client, establish rapport, and set the stage for future sessions. During this process, you will:

- Collect personal, medical, and mental health history
- Identify presenting concerns and goals for therapy
- Assess the client's current functioning and support systems
- Establish initial impressions and potential areas of focus

## Preparing for the Intake Session

Preparation is key to conducting a successful intake. Consider the following steps:

**Review Paperwork:** Before the session, review any pre-intake paperwork the client has completed. This may include personal information, consent forms, and preliminary questionnaires.

**Set Up a Comfortable Environment:** Ensure the counseling space is welcoming, private, and free from distractions. A comfortable environment helps clients feel at ease and open to sharing.



# Key Components of the Intake Session

What should you know?

During the intake session, focus on the following key components:

## Building Rapport

Greet the client warmly and introduce yourself.

Explain the purpose of the intake session and what they can expect.

Use active listening and empathetic responses to create a safe and supportive atmosphere.

## Gathering Information:

**Personal Information:** Collect basic demographic information, including name, age, gender, and contact details.

**Medical History:** Ask about any medical conditions, medications, allergies, and primary care physician.

**Mental Health History:** Inquire about past and current mental health diagnoses, previous therapy experiences, and any current symptoms.

**Presenting Concerns:** Explore the client's reasons for seeking therapy and their specific concerns or issues.

**Family and Social History:** Understand the client's family dynamics, support systems, and social relationships.

**Occupational and Educational Background:** Gather information about the client's work or school life and any related stressors.

**THINK  
OUTSIDE  
OF THE BOX**

**Remember to gather all necessary information from your biopsychosocial form so you can ask pertinent questions.**



# Key Components of the Intake Session

What should you know?

## Assessing Current Functioning

Evaluate the client's current level of functioning in various areas, such as emotional, behavioral, and cognitive.

Use assessment tools or questionnaires as needed to gain additional insights.

## Establishing Goals for Therapy

Collaboratively set initial goals for therapy based on the client's presenting concerns and desired outcomes.

Discuss potential treatment approaches and what the client hopes to achieve through therapy.

## Addressing Confidentiality

Explain the limits of confidentiality and any situations where you may be required to break confidentiality (e.g., risk of harm to self or others).

## Providing Next Steps

Outline the next steps in the therapeutic process, including scheduling future sessions and any additional assessments or referrals.

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OUTSIDE  
OF THE BOX**

**Remember if you forget a question or need to ask more you can always gather the information in your next session.**





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## Mastering the Art of Intakes

### Tips for Effective Intakes

**Be Present and Attentive:** Show genuine interest in the client's story and experiences. Your presence and attentiveness can help build trust and rapport.

**Use Open-Ended Questions:** Encourage clients to share more by asking open-ended questions that invite elaboration.

**Be Patient and Non-Judgmental:** Allow clients to share at their own pace without rushing or judging their responses.

**Take Thorough Notes:** Document key information during the intake session to refer back to in future sessions and for accurate record-keeping.

**Flexibility:** Be prepared to adapt your approach based on the client's unique needs and responses.

Conducting effective intake sessions is an essential skill for new and beginning counselors. By gathering comprehensive information, building rapport, and establishing clear goals, you can set the stage for a successful therapeutic relationship. Remember, the intake process is the foundation upon which your work with clients will be built, so approach it with care, empathy, and professionalism.