

INTERVIEW FORM (PRIVATE CLIENTS) GENERAL

Prepared for (entity)

Preparation date

Services Agreement

or N/A

Prepared by

Date			
Primary Client – Entity or Natural Person			
Title		Full name	
Address			
Date of birth		Place of birth	Driver's licence no.
Home tel		Mobile	
Work tel		Work email	
Home email		Home fax	
Work email			
Occupation		Job title	
Citizenship		Residence	
With what culture or gender do you identify? Or do you prefer not to say?		Do you identify as Aboriginal or Torres Strait Islander?	
Has the client or patient been seen previously by this practice? Provide details.			
Know Your Client			
What other information or issues can provide more context for the consultation?			
Australian drivers licence or photo card sighted?			
Medicare card sighted?			
Centrelink card sighted?			
Department of Veterans Affairs card sighted?			
Change of name or marriage certificate sighted (if necessary)?			

Spouse / Domestic Partner / Joint Client – entity or natural person

Title		Full name	
Address			
Date of birth		Place of birth	Driver's licence no.
Home tel		Mobile	
Work tel		Work fax	
Home email		Home fax	
Work email			
Occupation		Job title	
Citizenship		Residence	
With what culture or gender do you identify? Or do you prefer not to say?		Do you identify as Aboriginal or Torres Strait Islander?	

Personal history – documentation to supply as appropriate

1. General practitioner details
2. Family tree or genogram – attach copy
3. Current living arrangements - summarise
4. Medical conditions / treatment for / specialist drs overseeing / advanced care directive
5. IADL's (define or example?)
6. CBI-R (define or example?)
 - Power of enduring guardianship – state date and attach copy
 - Enduring power of attorney - state date and attach copy
 - Will - state date and attach copy
7. involvement with NCAT or court or other tribunal Y/N? If attach copy documents

Comments - about capacity, ability, conflicts of interests and concerns

Understanding	Knowledge	Believability
Adaptive Capability	Proactivity and Evident Impairment	Reflection, Proceed? – any warnings?

The observations below should be made on initial contact with a new client, within the context of discussion that is characterized by the use of open-ended questioning. The client should be questioned on his/her own (without other family or support persons present in the room).

Particular attention is warranted in cases where clients are in any way functionally dependent on another person(s), (including the necessity for another party’s presence during meetings or reliance on others to make the appointment or for transportation to the appointment), and where clients are over 65 years of age.

Capacity evaluation

1. Can the client provide you with an **explanation** as to why they have come to see you? Ask:
How is it I can assist you today?
What has brought you along to see me today?

Establish the client’s level of **understanding** around your engagement prior to entering into preliminary discussions (i.e. prior to providing them with any information yourself).

2. Assuming the client is able to identify and explain the matter for which they seek your professional services, and as preliminary discussions proceed, next turn your attention to whether your client is able to **identify** and **recall** key matters of factual relevance around the matter. Alternatively, does the client look to others to provide such information?

Establish the client’s **knowledge** and **memory** for facts relevant to the matter.

3. Are there any **discrepancies**, **inconsistencies**, or **oddities** in the account or explanations provided by the client? Does the

<p>client's story "add up"? Does the client's account of their situation appear, on the face of it, to be accurate and/or believable? Are there reasons to question what you are being told?</p> <p>Establish the believability and/or accuracy of the information provided by the client.</p>	
<p>4. Is your client able to integrate information exchanged in one part of your discussions into a later part of the discussions, in a relevant and purposeful manner?</p> <p>Establish whether the client is able to remember and make use of new information and advice in order to adapt their instruction in an appropriate manner.</p>	
<p>5. To what extent is the client engaging in discussions with you in a proactive manner?</p> <p>Establish whether the client is able to promote their own will and preference</p> <p>Is the client:</p> <ul style="list-style-type: none"> • initiating lines of enquiry unprompted? • able to direct the line of conversation, ask relevant questions pertaining to alternative options and outcomes, or request further information, detail or clarification? <p>Alternatively, is the client a passive participant in discussions and reliant on closed questions to provide their response?</p>	

Summarise assumptions	
Summarise client concerns	
Cause of enquiry	
Objective of client	
Summarise options	
Summarise advice	

What else do we need to know to help you?