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Intake & Consent Essentials

What to ask your clients, why it matters, and how to ask with care.

By Julie Bradshaw · theserenesource.com

A thoughtful intake process is the first act of care you offer a client. It tells them you are paying attention, and it gives you what you need to work safely and well.

Use this guide to build or review your own intake and consent forms. Adapt the wording so it sounds like you.

Contact and practical details

The basics, gathered once and kept up to date.

- [ ] Full name and the name they prefer to be called
- [ ] Phone, email, and preferred way to be contacted
- [ ] Emergency contact name and number
- [ ] How they heard about you (useful for knowing what is working)
- [ ] Date of birth, if relevant to your practice or insurance

Health and wellbeing

Ask only what you need, and explain why you are asking.

- [ ] Current medical conditions, injuries, or recent surgeries
- [ ] Pregnancy, or the possibility of pregnancy
- [ ] Medications or supplements that may be relevant
- [ ] Allergies or sensitivities (oils, scents, fabrics, latex)
- [ ] Whether they are currently under medical or mental health care
- [ ] Areas of the body they would prefer not to have touched

Intentions and hopes

This is where the session truly begins.

- [ ] What brings them to you right now
- [ ] What they would love to feel or notice after working together
- [ ] Any previous experience with your modality
- [ ] Anything that would help them feel more comfortable during a session

Informed consent

Clear, honest wording builds trust. Have it reviewed by a qualified professional.

- [ ] A plain description of what your session involves
- [ ] A statement that your work complements, and does not replace, medical care
- [ ] A statement that you do not diagnose, prescribe, or treat medical conditions
- [ ] Consent to touch (if applicable) and the client's right to pause or stop at any time
- [ ] Your cancellation, late-arrival, and refund policies
- [ ] How you store and protect their information
- [ ] Signature, printed name, and date

Kind ways to ask

Small wording shifts that help clients feel safe.

- [ ] Say "Is there anything you would like me to know?" rather than "List all problems"
- [ ] Explain why you ask health questions: "so I can adjust the session for your comfort and safety"
- [ ] Mark sensitive questions as optional where you can
- [ ] Invite them to update their form at any visit
- [ ] Thank them for sharing, every time

Storing records responsibly

Protecting client information is part of holding space.

- [ ] Keep paper forms in a locked cabinet, or digital forms in a password-protected tool
- [ ] Limit who can see client records
- [ ] Decide how long you keep records and how you will dispose of them securely
- [ ] Never discuss client details in public or on social media

A gentle next step

When your paperwork is calm and clear, your clients arrive feeling held before the session even begins.

Want this done for you? The Serene Source offers ready-made client forms, starter kits, and landing pages for holistic and energy practitioners.

theserenesource.com

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