

CLIENT SUMMARY

Client name: _____ Age: _____ End Date: _____

Married _____ How long? _____ Spouse's name: _____

Single _____ Divorced _____ Widowed _____ Separated _____ Children _____ Age(s) _____

Contact Info: Cell _____ Email: _____

Address: _____ Church affiliation: _____

Presenting Problem: _____

Overall perspective of the **positive aspects** in working with client: _____

Overall perspective of the **challenging aspects** of working with client: _____

Workbook Topics that had a **big impact** with the client: _____

Workbook Topics that the client **resisted or struggled** with: _____

Describe any **break-throughs** in these areas: _____

How many sessions did you have? _____ How many client cancelations? _____

Did client finish the process? _____ If not explain: _____

Client's donation amount? _____ Comment: _____

Who referred the client? _____

Referral's Church/Ministry/Organizational affiliations: _____

Did the client's spouse go/going through the Discipleship Counseling process? _____

Is the client a candidate for the TLI / TLAT in the future? _____ Did you discuss? _____

Client's Occupation: _____ Gifts/skills that could help True Life in the future?: _____

Board/Committee Member candidate? _____ Explain: _____

Did you discuss getting a **testimony** from the client? Video _____ Written _____

Did you discuss a plan for **when or how** you would get the testimony? _____

Did you discuss **Group Night** with the client? _____ Do they plan to attend? _____

Did you invite the client to join the **Monthly Support team**? _____ Did they decide or give any indication? _____

Did you discuss a plan for **follow up** regarding joining the Monthly Support team? _____

Overall thoughts about working with this client: _____

Any comments or concerns about client going forward? _____

Were you Mentored during this client? Yes/No: _____

Mentor's Name: _____ Comments on being Mentored: _____

Discipleship Counselor

Date

Please give a copy of this to the Counseling Supervisor when completed, and keep original in the client's file. Thank you!