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LIPTAK  
TREATMENT PLANNING IN CAREER COUNSELING

Brooks/Cole  
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# Treatment Planning in Career Counseling

JOHN J. LIPTAK

## CHAPTER 4

### INFORMATION-GATHERING PROCESS

In career counseling, accurate interviewing and assessment are critical; in diagnosing the client's problem and in developing and implementing an effective treatment plan. The intake and information process, or intake interview, is the first important step in the process of career counseling. The intake interview will probably be your first meeting with your client. This process consists of much more than merely gathering background information. This interview is your opportunity to gather comprehensive information about the client so that you can formulate a diagnosis and develop a treatment plan. Intake interviews also help to determine whether you are able to treat the person or whether a referral to another agency is appropriate. In addition, they provide the counselor with an opportunity to explore the client's fears, motivation, and commitment.

Clients entering into career counseling have a unique story to tell that is a combination of who they are, what they have done in the past, how they live, and their career-related problems. Your job as a career counselor, in the initial stage, is to gather information by observing the client and allowing sufficient time to tell her story. Within the client's story are the keys to helping her enhance her career development. This chapter focuses on using basic career counseling skills to help clients explore information about their significant others, their lifestyle, and the types of career-related problems that bring them to counseling. Included will be some actual dialogue the career counselor can use to help the client tell her story.

#### *THE INTAKE ASSESSMENT*

As a career counselor, you need to know as much as possible about your client and the context in which her concerns have occurred. This requires learning all you can about the client and her family background. For career counselors, the intake assessment is usually a two-step process. The first

step is to gather information about the client's career development, and the second step is to gather information about the client's personal history and life development. This can be done at the same time in the initial intake assessment session. Information about each of these information-gathering is provided in the following text.

### *1: Gathering Demographic and Career Information*

The first part of the intake interview will be comprised of gathering demographic, or identifying, information and career information. This information will include such aspects as:

1. Name and address
2. Gender
3. Date of birth
4. Ethnic and cultural background, native language, and religion
5. Marital and family status
6. Educational level (including all degrees, certifications, seminars, and college information)
  - a. Tell me about your educational history.
  - b. What are your educational strengths and weaknesses?
  - c. What courses did you like best in school?
  - d. Have you thought about pursuing additional education?
  - e. Which teachers influenced you the most?
  - f. What kind of a student have you been?
  - g. What types of certificates and certifications have you received and in what subjects?
  - h. What are your educational aspirations?
  - i. Are you interested in returning to school at this time?
7. Current occupation and employment history (including times of unemployment)
  - a. Tell me about your work history.
  - b. What types of work do you like?
  - c. What types of work do you not like?
  - d. For what types of work do you have the most ability?
  - e. When in your work history have you been unemployed and for how long?
  - f. What types of part-time jobs have you had?
8. Career development information (including influences on the client's career, childhood fantasies, volunteer experiences, limitations, and civic involvement)
  - a. What volunteer work experiences have you had?
  - h. How do you spend your leisure time?

- c. What were your childhood occupational fantasies?
  - d. Do you have any special hobbies that interest you?
  - e. Who has had the greatest influence on your career choices?
  - f. Do you have any physical limitations, and if so, how have they affected your career development?
  - g. What aspects of work have been most satisfying for you?
  - h. What aspects of work have been most dissatisfying for you?
9. Career counseling concerns/presenting problem (a brief statement about the person's complaints and troubles, the person's perceptions of why he or she needs career counseling at this time, and what type of help is needed)
- a. What experiences have led you to decide to seek career counseling at this time?
  - b. When did you first start to think about seeking career counseling
  - c. What sort of help would you like to have in our career counseling sessions?
  - d. What do you think the career counseling experience will be like. How can career counseling help you?
  - f. Have you received career counseling in the past? If so, when and for what reason?
  - g. Have you ever had help with career and life planning, and if so what was the experience like for you?

To gather career information about your client, you will want to use form similar to that shown in Figure 4.1. Information gathered for the Career/life Exploration Record will help facilitate the career counseling process. This record should be kept confidential and should not be release to any person without the participant's authorization.

### *Step 2: Gathering Personal History Information*

Because career counseling often involves some personal counseling, career counselors will also want to gather information about the client's life in general. Many agencies have a form on which counselors document the conversation with the client. Other agencies allow the intake interviewer to determine the information that is needed and to write a summary and analysis of the information.

The other components that are part of most intake interviews in caret counseling include mental status examination and medical history .

*Mental Status Examination.* Most mental status examinations Can be conceptualized by using the following categories:



4.1 Sample Intake Form (continued)

**II. Education**

High School: \_\_\_\_\_ Year of Graduation: \_\_\_\_\_

College or Vocational Training: \_\_\_\_\_

Degree/Year \_\_\_\_\_ Major: \_\_\_\_\_

Degree/Year \_\_\_\_\_ Major: \_\_\_\_\_

Degree/Year \_\_\_\_\_ Major: \_\_\_\_\_

Additional Education (Courses, Seminars, Certification Programs, etc.):

\_\_\_\_\_  
\_\_\_\_\_

Are you currently in school at this time? Yes  No

Are you interested in returning to school at this time? Yes  No

What are your educational aspirations? \_\_\_\_\_

**III. EMPLOYMENT HISTORY**

Work Experience: (List the most recent job first and work backward)

Position	Employer	Time employed
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Special hobbies, leisure interests, volunteer work, civic involvement, etc:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Figure 4.1 Sample Intake Form (continued)

**IV. CAREER DEVELOPMENT INFORMATION**

What are your present career aspirations? Assume no barriers to achieving them.

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Who or what has had the greatest influence on your career choice(s)?

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---

What was your childhood occupational interest or fantasy?

---

What leisure activities or hobbies do you enjoy now and/or have you enjoyed in the past?

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Do you have any physical limitations? (List conditions and their effect on your career development)

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What aspects of your work situations have been most satisfying? (i.e., salary, autonomy, coworkers, tasks, responsibility, variety, etc.)

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Figure 4.1 Sample Intake Form (continued)

What aspects of your work situations have been most dissatisfying?

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**V. CAREER COUNSELING CONCERNS**

Please indicate your reason(s) for participating in career counseling

- Desire to improve self
- Need assistance in career decision making
- Uncertain about career options
- Leaving the area. Desire to explore relocation and job search strategies
- Need to plan for the future
- Need to alter career goals
- Need assistance in choosing a college major
- Need to set long-range career goals
- Need for occupational information
- Need for labor market information
- Desire to prepare for a position change (i.e., promotion, demotion, transfer)
- Job terminating. Desire to explore job search strategies
- Job search assistance
- Career stress
- Job dissatisfaction due to working conditions (i.e., work hours, place or work)
- Job dissatisfaction due to job duty requirements
- Job dissatisfaction due to interpersonal relations with peers or supervisor
- General life dissatisfaction
- Relationship pressures (spouse, parents, children, significant others, peers)



1. Appearance
  - a. General impressions
  - b. Nature and appropriateness of clothing
  - c. Cleanliness
  - d. Unusual physical characteristics
2. Behavior
  - a. Attitude toward counselor (eye contact, willingness to respond to questions, etc.)
  - b. Habits (smoking, rocking, etc.)
  - c. Movement retardation or agitation
  - d. Tremors or tics
  - e. Apparent disabilities (visual, motor, auditory)
  - f. Other unusual mannerisms
3. Speech
  - a. Articulation or communications difficulties
  - b. Speech pressured or slowed
  - c. Unusual or idiosyncratic speech or word usage
4. Emotions
  - a. Observable emotions, including affect and immediate as well as underlying, long-standing emotional states
  - b. Range of emotions exhibited
  - c. Appropriateness of emotions
  - d. Lability of mood
  - e. Flat or blunted affect
5. Orientation to reality
  - a. Awareness of time (hour, month, day, and year)
  - b. Awareness of place (where the interview is being conducted)
  - c. Awareness of persons (who counselor and client are)
  - d. Awareness of situation (what is presently going on)
6. Concentration and attention
  - a. Ability to focus on stimuli (ask client to repeat three words in reverse order or to repeat at least five digits)
  - b. Ability to sustain attention (ask client to subtract 7s from 100)
  - c. Alert and responsive (or lethargic and/or distracted)
7. Thought processes
  - a. Capacity for abstract thinking
  - b. Flight of ideas
  - c. Loose associations
  - d. Repetitions or perseverations
  - e. Coherence and continuity of thoughts
  - f. Responses delayed or confused
8. Thought content
  - a. Suicidal ideation

- c. Delusions
  - d. Obsessions or compulsions
  - e. Fears or phobias
  - f. Ideas of persecution
  - g. Other prominent thoughts
9. Perception
    - a. Hallucinations (list type)
    - b. Other unusual sensory experiences
  10. Memory
    - a. Adequacy of immediate memory (check immediate recall)
    - b. Adequacy of short-term memory (check recall of information provided earlier in the interview)
    - c. Adequacy of long-term memory (check recall of information from last few days, weeks, or months)
  11. Intelligence
    - a. Educational level
    - b. Level of vocabulary
    - c. Overall intelligence
  12. Judgment and insight
    - a. Decision-making ability
    - b. Problem-solving abilities
    - c. Awareness of the nature of his or her problems
    - d. Impulsivity
    - e. Nature of self-image (especially strengths and weaknesses)

*Medical History.* The career counselor should identify any past or present illnesses the client has experienced and discuss any medications or medical treatments the person has received:

1. What past or present illnesses and accidents of significance has person experienced? How has this affected the client's career development and decision making?
2. Describe the nature of any hospitalizations of the client.
3. What past or present medical treatments has the person received?

Some career counselors may not be adequately trained to perform an evaluation in all of the areas discussed here. If you feel that you are not prepared to handle information from any of these categories, you should use information as a guide for referring your clients to other mental health professionals. In addition, many texts (c.f., Maxmen & Ward, 1995; Selig 1996) are available as references for further information about gathering personal and mental health information in an intake interview.