

Mental Health History Form

How do I share what I know with my loved one's providers?

A mental health history can build a powerful written case for mental health treatment. A written case will help the treatment team provide better care for your loved one when they are admitted into a facility. A list of acute episodes, diagnoses, and hospitalizations is the most critical information to share.

A mental health history can also include information about medications that do or don't work, adverse reactions, and treatment preferences. If possible, build this form with your loved one at a time when they are doing well. The mental health history might be a companion document with a psychiatric advance directive (PAD), which is a place for someone with a mental illness to provide more detail about their preferences if their condition worsens.

Included in this article is a fillable form for building a mental health history. The form can also be printed and filled out by hand. Print or make copies of the completed mental health history to save in key locations (home, backpack, car) and store copies on your electronic devices for easy updating, printing, and sharing. Whenever possible, fax this information to the facility. Hand delivery may be an option in some situations. In most facilities, a physical, written document is placed in the person's file. Anyone who has access to that file will see this history. A facility's fax number is often posted on the website, or you might call the main phone number to ask for a fax number.

If you don't have a fax machine, you might find one at a store with services for express mailing and copying. If fax is not an option, request an email address.

No [privacy laws](#) prevent you from sharing information with a facility. Staff may be unwilling to speak with you or share information with you, but you can make clear that you are *providing* information and not asking them to disclose information to you. You

also have a right to request general information about how to support someone with a certain diagnosis or certain risk factors. You might ask how to make a home safer for someone living with psychosis or suicidal ideation, for example.

When sharing medical history, include a note that you want this information added to the patient's file. Be sure to provide your contact information and offer to answer additional questions upon request.

Pro Tip: Never assume documents you've shared with one provider will transfer. Share mental health history with each provider/agency every time someone is admitted into care or transferred from one program or facility to another.

Step-by-step Guidance for Building a Mental Health History

This guidance was inspired by work from Gail Evanguelidi for California Conservatorships. Treatment Advocacy Center revised and adapted the format for use across the United States.

Instructions:

A doctor's time is limited, so a concise, well-written document is most effective. Skip any parts that do not apply to your loved one or that you don't have information on.

If you need additional space for any of your answers, use the "Additional Notes" section on page 3.

Step 1: Label the document

- Person's name

*(Do **not** use a social security number to identify the person.)*

Step 2: Insurance Information

- Medicaid, Medicare, private insurance
- Name of the company

Step 3: Describe history with mental illness

Summarize historical information older than 12 months. Describe key symptoms that indicated the onset of a mental illness.

Step 4: List key events in last year

Starting with the most recent event, in reverse chronological order for the past 12 months, list hospitalizations, incarcerations, periods of homelessness and restraining orders, including dates (an estimate is fine) and location.

Step 5: Provide medical details including symptoms and characteristics

Create a list of symptoms and provide a description or examples for each.

Step 6: List medication history

Provide medication history, if known, including details about dose, response, and side effects. Note whether a medication is still in use and, if not, why it was discontinued.