Tutoring Intake Form

Please fill this in before our first session. Skip anything that doesn't apply.

1. Student

Student name		Name they like to be called	
Grade or level		Age (if under 18)	
School or program (optional)		Student email (optional)	

2. Parent or guardian (for students under 18)

Name and relationship		Phone	
Email		Best way to reach you	☐ Text ☐ Call ☐ Email
Second parent/guardian (optional)		Who receives invoices?	

3. Subject and goals

Subject(s) and course	
Main goal (tick up to 3)	☐ Raise a grade ☐ Keep up in class ☐ Test or exam prep ☐ Fill gaps ☐ Get ahead ☐ Confidence ☐ Study skills ☐ Homework support
Test or exam, date and target (if any)	
In 3 months, what would tell you tutoring is working?	

4. Where things stand now

Recent grades or scores (if you are happy to share)	
Topics or skills that feel hardest right now	
Tutored before? What worked or didn't?	

5. Learning needs (optional)

Anything that helps the student learn: an IEP or 504 plan, a learning difference, attention, anxiety, or other needs you want me to know. Share only what you are comfortable sharing.	

6. Schedule and format

Days and times that work	
Session length and how often	☐ 30 min ☐ 45 min ☐ 60 min ☐ 90 min ____ times a week
Format	☐ Online ☐ In person: my home ☐ In person: your location ☐ Either
Address (in person) or time zone (online)	
For online lessons: device and quiet space?	☐ Laptop/computer ☐ Tablet ☐ Webcam ☐ Headphones
Preferred start date	

7. Emergency contact (in-person lessons)

Name and relationship		Phone	
Health information I should know for in-person lessons (optional, e.g. allergies)			

8. Permissions

Permission	Yes	No
I may contact the student directly (text or email) about lessons		
Online sessions may be recorded for the student to review		
I may share photos of the student's work in progress updates to you		
I may talk with the student's teacher or school about goals		

9. Payment and policies

Rate and lesson option	☐ Single lesson ☐ Package of ___ lessons ☐ Monthly plan Rate: _____
When payment is due	Payment is due before each lesson or package starts, unless we agree otherwise.
Cancellation	Please give at least ____ hours' notice to reschedule. Late cancellations and no-shows are charged in full.
Agreement	☐ I have read the tutoring agreement and cancellation policy

10. Signature

Parent/guardian (or adult student) name		Date	
Signature			

How I use this information: only to plan and run lessons, take payment and contact you. I keep it private and will delete it when we stop working together, or sooner if you ask.

For the tutor (office use)

Received on		Intake call on	
Starting assessment / baseline		Goals agreed with family	
First session booked		Where this form is stored	

Free template from TutorFluid: tutorfluid.com/blog/tutoring-intake-form. Edit it freely: change the wording, delete sections you don't need. Not legal advice; check the rules where you teach.

Example: a filled-in intake form

EXAMPLE ONLY. The family, student, school and scores below are fictional and show how a completed form can read.

1. Student

Student name	Example student ("Maya Example")	Name they like to be called	Maya
Grade or level	Grade 10	Age (if under 18)	15
School or program (optional)	Example High School	Student email (optional)	(left blank)

2. Parent or guardian (for students under 18)

Name and relationship	Example parent (mother)	Phone	(555) 010-0000
Email	parent@example.com	Best way to reach you	☒ Text ☐ Call ☐ Email
Second parent/guardian (optional)	—	Who receives invoices?	Mother

3. Subject and goals

Subject(s) and course	Math: Algebra 2; SAT Math later in the year
Main goal (tick up to 3)	☒ Raise a grade ☒ Test or exam prep ☒ Confidence
Test or exam, date and target (if any)	SAT, spring; target to be set after a practice test
In 3 months, what would tell you tutoring is working?	Maya does her homework without getting stuck for an hour, and her Algebra 2 quiz scores are back to where they were last year.

4. Where things stand now

Recent grades or scores (if you are happy to share)	C on the last progress report in Algebra 2; quizzes in the 60s and 70s
Topics or skills that feel hardest right now	Factoring, word problems, and showing work on tests
Tutored before? What worked or didn't?	Yes, a group class last year. Too fast for her; she didn't ask questions.

5. Learning needs (optional)

Anything that helps the student learn: an IEP or 504 plan, a learning difference, attention, anxiety, or other needs you want me to know. Share only what you are comfortable sharing.	Maya has extra time on tests at school. She gets anxious when timed.

6. Schedule and format

Days and times that work	Tue or Thu after 4:30 pm; Sunday afternoon
Session length and how often	☐ 30 min ☐ 45 min ☒ 60 min ☐ 90 min 1 time a week
Format	☒ Online ☐ In person: my home ☐ In person: your location ☐ Either
Address (in person) or time zone (online)	Online, Mountain Time (Arizona)
For online lessons: device and quiet space?	☒ Laptop/computer ☐ Tablet ☒ Webcam ☒ Headphones
Preferred start date	Next week

7. Emergency contact (in-person lessons)

Name and relationship	Not needed (online)	Phone	—
Health information I should know for in-person lessons (optional, e.g. allergies)	—		

8. Permissions

Permission	Yes	No
I may contact the student directly (text or email) about lessons	☒	
Online sessions may be recorded for the student to review	☒	
I may share photos of the student's work in progress updates to you	☒	
I may talk with the student's teacher or school about goals		☒

9. Payment and policies

Rate and lesson option	☐ Single lesson ☒ Package of 10 lessons ☐ Monthly plan Rate: (your package price) Rate: _____
When payment is due	Payment is due before each lesson or package starts, unless we agree otherwise.
Cancellation	Please give at least ____ hours' notice to reschedule. Late cancellations and no-shows are charged in full.
Agreement	☒ I have read the tutoring agreement and cancellation policy

10. Signature

Parent/guardian (or adult student) name	Example parent	Date	(date)
Signature	(signed)		

How I use this information: only to plan and run lessons, take payment and contact you. I keep it private and will delete it when we stop working together, or sooner if you ask.

Add-on questions and the intake call

Add the block that matches the student, then use the 10-minute call to confirm goals.

Test prep (SAT, ACT, AP, state tests)

- Which test, and the test date?
- Score from the most recent official or full practice test (section scores if you have them).
- Target score, and why that number (for example, a scholarship or a college range).
- Accommodations approved for the test, if any.

Language lessons

- Native language(s) and other languages spoken at home.
- Current level, if known (for example a school level or a CEFR level such as A2 or B1).
- Main goal: conversation, school class, travel, an exam, work.
- Which matters most: speaking, listening, reading or writing?

Music lessons

- Instrument, and does the student have one at home?
- Years played, and any pieces they can play now.
- Reads music? ☐ Yes ☐ A little ☐ No
- Goal: enjoyment, an exam or audition, a school band, a performance date.

Adult learners

- What is the goal and the deadline (a course, a certification exam, a job)?
- How much time can you practice each week?
- Have you studied this before, and how long ago?
- Remove the parent/guardian section and the emergency contact if it doesn't apply.

10-minute intake call

1. Thank them and confirm the goal in their words (2 min).
2. Ask about the hardest topic and one recent example (3 min).
3. Agree on one 3-month goal and how you will measure it (3 min).
4. Confirm the schedule, format, payment and cancellation terms, then book the first session (2 min).

Collect only what you need to teach and get paid. For students under 18, have a parent or guardian fill in and sign the form. Not legal advice.