

CLIENT INTAKE FORM

Thank you for taking the time to fill out this form and provide us with details of your health, goals and medical history. Feel free to save this form to your computer and type in your answers at your convenience. The boxes where you type your responses will expand to accommodate your text, so you will have as much space as you need.

Client Information

Name	
Address	
City	
State	_Zip Code
Phone (day)	
Phone (cell)	
Phone (night)	
Email	
Referred by	

Statistics

Age	
Birth Date	
	Chosen gender
Height	
Blood type	
Current weight	
Ideal weight	
Weight one year ago	



Birth Weight (if known)								
Birth Order (please list ages of biological siblings)								
Family/Living Situation								
Partner's gender at birth								
Partner's chosen gender								
Children:								
Occupation:								
Exercise/Recreation:								

History

- 1. Have you lived or traveled outside of the United States? If so, when and where?:
- 2. Have you or your family recently experienced any major life changes? If so, please comment:
- 3. How much time have you had to take off from work or school in the last year?
 - 🗆 0 to 2 days
 - □ 3 to 14 days
 - $\hfill\square$ more than 15 days



Stressful Life Events

Studies show that past and continued trauma play a significant role in health and health outcomes. Our understanding of your history will help us to best support you moving forward.

4. Have you experienced one or more of these stressful life events or traumas in your life?

Death of a family member, romantic partner or very close friend because of accident, homicide, or suicide	□ yes	□ no
Sexual or physical abuse by a family member, romantic partner, stranger, or someone else	□ yes	□ no
Emotional neglect or abuse such as ridicule, bullying, put downs, being ignored or told you were no good by a family member or		
romantic partner	□ yes	□ no
Discrimination	□ yes	□ no
Life-threatening accident or situation (military combat or		
lived in a war zone)	□ yes	□ no
Life-threatening illness	□ yes	□ no
Physical force or weapon threatened or used against you in a		
robbery or mugging	□ yes	□ no
Witness the murder, serious injury or assault of another person	🗆 yes	□ no

5. Is there anything else that you'd like to share about these stressful life events or traumas?



Health Concerns

6. What are your main health concerns? (Describe in detail, including the severity of the symptoms):

7. When did you first experience these concerns?

- 8. How have you dealt with these concerns in the past?
 - □ doctors
 - \square self-care
- 9. Have you experienced any success with these approaches?
- 10. What other health practitioners are you currently seeing? List name, specialty and phone # below.
- 11. Please list the date and description of any surgical procedures you have had (including breast reduction or augmentation).



12. How often did you take antibiotics in infancy/childhood?

13. How often have you taken antibiotics as a teen?

14. How often have you taken antibiotics as an adult?

15. List any medicine you are currently taking:

16. List all vitamins, minerals, herbs and nutritional supplements you are now taking:

17. Have any other family members had similar problems (describe)?



Nutritional Status

- Are there any foods that you avoid because of the way they make you feel? If yes, please name the food and the symptom:
- 19. Do you have symptoms immediately after eating like bloating, gas, sneezing or hives? If so, please explain:
- 20. Are you aware of any delayed symptoms after eating certain foods such as fatigue, muscle aches, sinus congestion, etc? If so, please explain:
- 21. Are there foods that you crave? If so, please explain:
- 22. Describe your diet at the onset of your health concerns:
- 23. Do you have any known food allergies or sensitivities?



- 24. Which of the following foods do you consume regularly?
- 🗆 soda □ fast food □ diet soda □ gluten (wheat, rye, barley) □ refined sugar □ dairy (milk, cheese, yogurt) □ alcohol □ coffee 25. Are you currently on a special diet? □ autoimmune paleo (AIP) □ blood type □ SCD/GAPS 🗆 raw □ dairy restricted or dairy-free □ refined sugar-free □ gluten-free vegetarian □ ketogenic diet 🗆 vegan □ paleo □ Other (please describe) 26. What percentage of your meals are home-cooked?

□ 10	□ 30	□ 50	□ 70	□ 90
□ 20	□ 40	□ 60	□ 80	□ 100

27. Is there anything else we should know about your current diet, history or relationship to food?

Intestinal Status

- 28. Bowel Movement Frequency
 - □ 1-3 times per day
 - $\hfill\square$ more than 3 times per day
 - □ not regularly every day



- 29. Bowel Movement Consistency
 - □ soft & well formed
 - $\hfill\square$ often float
 - $\hfill\square$ difficult to pass
 - 🗆 diarrhea
- 30. Bowel Movement Color
 - □ medium brown
 - $\hfill\square$ very dark or black
 - □ greenish
 - □ blood is visible

- \Box thin, long or narrow
- $\hfill\square$ small and hard
- □ loose but not watery
- $\hfill\square$ alternating between hard and loose
- 🗆 variable
- □ yellow, light brown
- $\hfill\square$ chalky colored
- □ greasy, shiny

31. Do you experience intestinal gas? If so, please explain if it is excessive, occasional, odorous, etc:

32. Have you ever had food poisoning? If yes, please describe in detail, including 1) Where were you2) What did you treat it with and 3) If you feel like you fully recovered from it:



Medical Status

33. Please identify any current or past conditions and add a date for when the condition appeared. In the space below each list, please briefly describe your symptoms, chosen treatment(s), and dates.

Gastrointestinal past now DATE DATE PAST NOW 🗆 🗆 _____ Irritable Bowel □ □ ____ Gut infections Svndrome Dysbiosis \square 🗆 _____ Crohn's 🗆 _____ Leaky gut Ulcertative Colitis П _____ Food allergies, intolerances П □ _____ Gastritis or Peptic Ulcer or reactions П Disease □ _____ Gallstones □ GERD (reflux or heartburn) □ _____ Known absorption or □ _____ Celiac Disease assimilation issues П sibo □ □ ____ Other Please briefly describe your symptoms, chosen treatment(s) and dates:

Cardiovascular



Please briefly describe your symptoms, chosen treatment(s) and dates:



Hormones/Metabolic



Please briefly describe your symptoms, chosen treatment(s) and dates:

Cancer



Please briefly describe your symptoms, chosen treatment(s) and dates:

Genital & Urinary Systems PAST NOW DATE PAST NOW DATE Image: I



	 Erectile Dysfunction or		 Frequent Yeast Infections
	Sexual Dysfunction		Other

Please briefly describe your symptoms, chosen treatment(s) and dates:

Musculoskeletal/Pain

PAST NOW	DATE		PAST	NOW	DATE	
	Oste	eoarthritis				Sore muscles or joints,
	Fibr	omyalgia				undiagnosed
	Chro	onic Pain		□ _		Other

Please briefly describe your symptoms, chosen treatment(s) and dates:

Immune/Inflammatory

PAST NOW	DATE		PAST	NOW	DĀ	TE	
		Chronic Fatigue					Environmental allergies
		Syndrome					Multiple chemical
		Rheumatoid Arthritis					sensitivities
		Lupus SLE					Latex allergy
		Raynaud's				_;	Hepatitis
		Psoriasis				_;	Lyme (and co-infections)
		Mixed Connetive Tissue					Chronic Infections
		Disease (MCTD)					(Epstein-Barr, Cytomegalo-
		Poor immune function					virus, Herpes, etc.)
		(frequent infections)				_;	Other
		Food allergies					

Please briefly describe your symptoms, chosen treatment(s) and dates:



Respiratory Conditions



Skin Conditions



Please briefly describe your symptoms, chosen treatment(s) and dates:

Neurologic/Mood





🗆 🗆 _____ Other

Please briefly describe your symptoms, chosen treatment(s) and dates:

Miscellaneous



Please briefly describe your symptoms, chosen treatment(s) and dates:

34. Please check frequency of the following:

Short term memory impairment	□ yes	□ no	□ sometimes
Shortened focus of attention and ability to concentrate	□ yes	□ no	□ sometimes
Coordination and balance problems	□ yes	□ no	□ sometimes
Problems with lack of inhibition	□ yes	□ no	□ sometimes
Poor organization abilities	□ yes	□ no	□ sometimes
Problems with time management (late or forget appts)	□ yes	□ no	□ sometimes
Mood instability	□ yes	□ no	□ sometimes
Difficulty understanding speech and word finding	□ yes	□ no	□ sometimes
Brain fog, brain fatigue	□ yes	□ no	□ sometimes
Lower effectiveness at work, home or school	□ yes	□ no	□ sometimes
Judgment problems like leaving the stove on, etc	□ yes	□ no	□ sometimes



Health Hazards

35. Have you been exposed to any chemicals or toxic metals (lead, mercury, arsenic, aluminum)?

36. Do odors affect you?

- 37. Are you or have you been exposed to second-hand smoke?
- 38. Are you currently or have you been exposed to mold? (If so, what is/was the source of the exposure and for how long have you been/were you exposed to mold, if known?)

Oral Health History

- 39. How long since you last visited the dentist? What was the reason for that visit?
- 40. In the past 12 months has a dentist or hygienist talked to you about your oral health, blood sugar or other health concerns? (Explain.)



- 41. What is your current oral and dental regimen? (Please note whether this regimen is once or twice daily or occasionally and what kind of toothpaste you use.)
- 42. Do you have any mercury amalgams? (If no, were they removed? If so, how?)
- 43. Have you had any root canals? (If yes, how many and when?)
- 44. Do you have any concerns about your oral or dental health? (gums bleed after flossing, receding gums)
- 45. Is there anything else about your current oral or dental health or health history that you'd like us to know?

Lifestyle History

46. Have you had periods of eating junk food, binge eating or dieting? List any known diet that you have been on for a significant amount of time.



47. Have you used or abused alcohol, drugs, meds, tobacco or caffeine? Do you still?

48. How do you handle stress?

Sleep History

49. Are you satisfied with your sleep?

50. Do you stay awake all day without dozing?

51. Are you asleep (or trying to sleep) between 2:00 a.m. and 4:00 a.m.?

52. Do you fall asleep in less than 30 minutes?

53. Do you sleep between 6 and 8 hours per night?



For Women Only

- 54. How old were you when you first got your period?
- 55. How are/were your menses? Do/did you have PMS? Painful periods? If so, explain.

- 56. In the second half of your cycle do you experience any symptoms of breast tenderness, water retention or irritability?
- 57. Have you experienced any yeast infections or urinary tract infections? Are they regular?
- 58. Have you/do you still take birth control pills: If so, please list length of time and type.
- 59. Have you had any problems with conception or pregnancy?



60. Are you taking any hormone replacement therapy or hormonal supportive herbs? If so, please list again here.

Sexual History

- 61. Do you have any concerns or issues with your sexual functioning that you'd like to share with us (pain with intercourse, dryness, libido issues, erectile dysfunction)?
- 62. In the past year, have your sexual partners been men, women, or both? And how many partners have you had in the past year?

Mental Health Status

- 63. How are your moods in general? Do you experience more anxiety, depression or anger than you would like?
- 64. On a scale of 1–10, one being the worst and 10 being the best, describe your usual level of energy.



65. At what point in your life did you feel best? Why?

Other

66. What role do you play in your wellness plan?

- 67. Do you think family and friends will be supportive of you making health and lifestyle changes to improve your quality of life? Explain, if no.
- 68. Who in you family or on your health care team will be most supportive of you making dietary change?

69. Please describe any other information you think would be useful in helping to address your health concern(s):



70. What are your health goals and aspirations?

71. Though it may seem odd, please consider why you might want to achieve that for yourself:

FxNA sleep assessment



SLEEP HISTORY

While "sleep troubles" are often lumped together as one singular symptom, the reasons leading to your inability to catch those nightly Zzzzs can be varied. Help us to target our recommendations to your unique needs by taking a moment to answer these key sleep questions and assessments.

- 1. Are you satisfied with your sleep?
- 2. Do you feel rested in the morning?
- 3. Do you stay awake all day without dozing?
- 4. Do you fall asleep in less than 30 minutes?
- 5. Do you sleep between 6 and 8 hours per night?
- 6. Do you have a regular bedtime? (If so, when?)
- 7. Do you have a regular awakening time? (If so, when?)
- 8. Do you wake in the middle of the night? (If so, is there a regular waking time and how long are you awake?)
- 9. Are you asleep (or trying to sleep) between 2:00 a.m. and 4:00 a.m.?

FxNA sleep assessment, continued



- 10. Do you currently have any practices that enhance the quality of your sleep?
- 11. What have you tried (habits, supplements, etc.) to remedy sleep troubles in the past?
- 12. What (if any) electronics are in your room at nighttime?
- 13. On a scale of 1–10, how dark is your bedroom?
- 14. Do you consume any stimulants during the day? If so, when?
- Please identify how you would most generally categorize your sleep troubles: MIND (racing, working, etc.), BODY (pain, discomfort, etc.), or SPIRIT (depression, anxiety, etc.).

SLEEP SYMPTOMS SCALE

				ten you experience each of t cale: 0 = never 1 = monthly			-		ing the following
0	1	2	3		0	1	2	3	
				Daytime sleepiness					Nightmares
				No dream recall					Snoring
				Sleepwalking					Sleep apnea

SYMPTOM TRACKER



Rate how often you experience each of the following symptoms using the following frequency scale:

0 = never 1 = monthly 2 = weekly 3 = daily

GENERAL

0	1	2	3		0	1	2	3	
				Fever					Excessive sweating
				Chills/Cold all over					Heat intolerance
				Cold intolerance					Swollen glands
				Aches/Pains					Cold hands & feet
				General weakness					Low blood pressure
				Difficulty sweating					Distorted vision

EARS

1	2	3		0	1	2	3	
			Aches					Itching
			Discharge					Pressure
			Pains					Frequent infections
			Ringing					Tubes in ears
			Deafness/Hearing loss					Sensitive to loud noises
			Feeling of fullness					Hearing hallucinations
	1	1 2	1 2 3	Aches Discharge Pains Ringing Deafness/Hearing loss				

THROAT

0	1	2	3		0	1	2	3	
				Mucus					Enlarged glands
				Difficulty swallowing					Constant clearing of throat
				Frequent hoarseness					Throat closes up
				Tonsillitis					



FREQUENCY SCALE 0 = never 1 = monthly 2 = weekly 3 = daily

HEAD

0 1 2 3		0	1	2	3	
Head	aches after meals					Piercing headaches
Head	aches if meals skipped					Afternoon headaches
Head	aches severe					Daytime headaches
Head	aches migraine					Headaches relieved by eating
Head	aches frontal					sweets
Occi	pital (back of head)					Face twitch or ticks
ache	3					

EYES

0	1	2	3		0	1	2	3	
				Feeling of sand in eyes					Floaters in eyes
				Double vision					Puffiness under eyes
				Blurred vision					Strong light irritates
				Poor night vision					Cataracts
				See bright flashes					Visual hallucinations
				Halo around lights					Conjunctivitis
				Eye pains					Eye crusting

NECK

0	1	2	3		0	1	2	3	
				Stuffy					Lumps
				Stiffness					Neck glands swell
				Swelling					



SKIN/HAIR/NAILS

0	1	2	3		0	1	2	3	
				Cuts heal slowly					Shingles
				Bruise easily					Nails split
				Rashes					Fingernails chip, break or peel
				Pigmentation					-
				Changing moles					White spots/Lines on nails
				Calluses					Crawling sensation
				Eczema					Burning on bottom of feet
				Psoriasis					Athletes foot
				Dryness/cracking skin					Cellulite
				Oiliness					Circles under eyes
									Bugs love to bite you
				Itching	To real	ur skii			to
				Acne	is you	ur skii	n sens	sitive	
				Boils					Sun?
				Hives					Fabrics?
				Fungus on nails					Detergents?
									Lotions & creams?
				Hair loss					
				Peeling skin					



NOSE/SINUSES

0	1	2	3		0	1	2	3	
				Stuffy					Sneezing spells
				Bleeding					Post nasal drip
				Running/Discharge					No sense of smell
				Watery nose					Change of seasons tend to
				Congested					make your symptoms worse
				Infection	If yes	s, is it [.]	worse	e in th	
				Polyps					Spring?
				Acute smell					Summer?
				Drainage					Fall?
									Winter?

MOUTH

0	1	2	3		0	1	2	3	
				Coated tongue					Chapped lips
				Sore tongue					Fever blisters
				Dental problems					Wear dentures
				Bleeding gums					Grind teeth when sleeping
				Canker sores					Bad breath
				TMJ					Dry mouth
				Cracked lips/corners					



CIRCULATION/RESPIRATION

0	1	2	3		0	1	2	3	
				Swollen ankles					Frequently sighing
				Sensitive to hot					Shortness of breath
				Sensitive to cold					Night sweats
				Extremities cold or clammy					Varicose veins/spider veins
				Hands/Feet go to sleep/					Mitral valve prolapse
				numbness/tingling					Murmurs
				High Blood Pressure					Skipped heartbeat
				Chest pain					Heart enlargement
				Pain between shoulders					Angina pain
				Dizziness upon standing					Bronchitis/Pneumonia
				Fainting spells					Emphysema
				High cholesterol					Croup
				High triglycerides					Frequent colds
				Wheezing					Heavy/tight chest
				Irregular heartbeat					Phlebitis
				Palpitations					
				Low exercise tolerance					
				Frequent coughs					

Breathing heavily



GASTROINTESTINAL

0	1	2	3		0	1	2	3	
				Peptic/Duodenal Ulcer					Diarrhea
				Poor appetite					Constipation
				Excessive appetite					Changes in bowels
				Gallstones					Rectal bleeding
				Gallbladder pain					Tar-like stools
				Liver pain					Rectal itching
				Nervous stomach					Bloating
				Full feeling after small meal					Belch frequently
				Indigestion					Anal itching
				Heartburn					Anal fissures
				Acid Reflux					Bloody stools
				Hiatal Hernia					Pale yellow/tan/gray stools
				Nausea					Green stools
				Vomiting					Mucus in stool
				Vomiting blood					Undigested food in stools
				Abdominal Pains/Cramps					Bad breath
				Loss of taste for meat					Stomach upset taking
				Feeling of incomplete bowel					vitamins
				evacuation					Anemia unresponsive to iron
				Gas					



KIDNEY/URINARY TRACT

0	1	2	3		0	1	2	3	
				Burning					Painful urination
				Frequent urination					Bladder infections
				Blood in urine					Kidney infections
				Night time urination					Bedwetting
				Problem passing urine					Pain in mid back region
				Kidney pain					Incontinence or loss of
				Kidney stones					bladder control

JOINTS/MUSCLES/TENDONS

0	1	2	3		0	1	2	3	
				Pain wakes you					Spasms
				Muscle twitches					Head injury
				Weakness in legs and arms					Muscle stiffness in morning
				Balance problems					Damp weather bothers you
				Muscle cramping					Pain in mid back region
				Foot cramps					Restless leg syndrome
				Pain in tendons					Considered clumsy
				Joint issues					

NERVOUS SYSTEM

0	1	2	3		0	1	2	3	
				Convulsions					Forgetfulness
				Dizziness					
				Fainting spells					
				Blackouts/amnesia					



MENTAL HEALTH

0	1	2	3		0	1	2	3	
				Poor memory					Often break out in cold
				Forgetfulness					sweats
				Indecisive					Profuse sweating
				Confusion					Depressed
				Mental sluggishness					Often awakened by frightening dreams
				Poor concentration					Misunderstood by others
				Frequently keyed up and jittery					Irritable
				Startled by sudden noises					Feeling of hostility/volatile or aggressive
				Anxiety/Feeling of panic					Fatigue
				Go to pieces easily					Hyperactive
				Listless/groggy					Vision changes
				Withdrawn feeling/Feeling 'lost'					Unable to coordinate muscles
				Unable to concentrate/short					Have difficulty falling asleep
				attention span					Have difficulty staying asleep
				Unable to reason					Daytime sleepiness
				Tend to worry needlessly					Workaholic
				Considered a nervous person					Have had hallucinations
				by others					Feel regular grief
				Unusual tension					Feel regular joy
				Frustration					Often feel relaxed
				Emotional numbness					



SLEEP SYMPTOMS

0	1	2	3		0	1	2	3	
				Difficulty falling asleep					Daytime sleepiness
				Early waking					Fatigue
				Waking between 2:00 and					No dream recall
				4:00 am					Sleepwalker
				Unable to fall back asleep after waking in the night					Nightmares
				Sleep 6 to 8 hours per night					Snoring
				Wake up unrefreshed					Sleep apnea

MEN'S SYMPTOMS (MEN ONLY)

0	1	2	3		0	1	2	3	
				Prostate enlargement					Low sperm count
				Prostate infection					Difficulty obtaining erection
				Change in libido					Difficulty maintaining an
				Impotence					erection
				_ Diminished/poor libido					Nocturia (urination at night)
				Infertility					Urgency/Hesitancy/Change in
				Lumps in testicles					Urinary Stream
				Sore on penis					Loss of bladder control
				Genital pain					Pain on inside of legs or heels
				Hernia					



WOMEN'S SYMPTOMS (WOMEN ONLY)

0

)	1	2	3		0	1	2	3	
				Fibrocystic breasts					Hot flashes
				Lumps in breast					Mood swings
				Fibroid Tumors in breasts					Concentration/Memory problems
				Spotting		1			
				Heavy periods					Ovarian cysts
				Fibroid Tumors in uterus					Pregnant
				Painful periods					Infertility
				Change in period					Decreased libido
				Breast soreness before period					Heavy bleeding
				Endometriosis					Joint pains
				Non-period bleeding					Headaches
				Breast soreness during period					Weight gain
				Vaginal dryness					Loss of bladder control
				Vaginal discharge					Palpitations
				Partial/total hysterectomy					Thinning skin
			Depression during periods					Pain during intercourse	
				Depression during periods					Food cravings