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.

Client Information

Name _____

Address _____

City _____

State _____ Zip Code _____

Phone _____

Email _____

Referred by _____

Statistics

Age _____

Birth Date _____

Gender _____

Height _____

Current Weight _____

Ideal Weight _____

Weight one year ago _____

Birth Weight (if known) _____

Birth Order (please list ages of biological siblings) _____

Family/Living Situation _____

_____

Occupation _____

Exercise/Recreation _____

_____

History

1. Have you or your family recently experienced any major life changes? If so, please comment:

2. 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
- ☐ 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.

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

Death of a family member, partner or very close friend	☐ yes ☐ no
Sexual or physical abuse by a family member, partner, stranger, or someone else	☐ yes ☐ no
Emotional neglect or abuse by a family member or partner	☐ yes ☐ no
Life-threatening accident or situation	☐ yes ☐ no
Life-threatening illness	☐ yes ☐ no

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

Health Concerns

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

6. When did you first experience these concerns?

7. How have you dealt with these concerns in the past?
   - ☐ doctors
   - ☐ self-care

8. Have you experienced any success with these approaches?

9. What other health practitioners are you currently seeing? List name and specialty below.

10. Please list the date and description of any surgical procedures you have had (including breast reduction or augmentation).

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

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

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

14. List any medicine you are currently taking:

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

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

Nutritional Status

17. Are there any foods that you avoid because of the way they make you feel? If yes, please name the food and the symptom:

18. Do you have symptoms immediately after eating like bloating, gas, sneezing or hives? If so, please explain:

19. Are you aware of any delayed symptoms after eating certain foods such as fatigue, muscle aches, sinus congestion, etc? If so, please explain:

20. Are there foods that you crave? If so, please explain:

21. Describe your diet at the onset of your health concerns:

22. Do you have any known food allergies or sensitivities?

23. Which of the following foods do you consume regularly?

- ☐ Soda
- ☐ diet soda
- ☐ refined sugar
- ☐ alcohol
- ☐ fast food
- ☐ gluten (wheat, rye, barley)
- ☐ dairy (milk, cheese, yogurt)
- ☐ coffee

24. Are you currently on a special diet?

- ☐ dairy restricted or dairy-free
- ☐ vegetarian
- ☐ vegan
- ☐ paleo
- ☐ Other (please describe)
- ☐ refined sugar-free
- ☐ gluten-free
- ☐ ketogenic diet

25. What percentage of your meals are home-cooked?

- ☐ 10
- ☐ 20
- ☐ 30
- ☐ 40
- ☐ 50
- ☐ 60
- ☐ 70
- ☐ 80
- ☐ 90
- ☐ 100

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

Intestinal Status

27. Bowel Movement Frequency

- ☐ 1–3 times per day
- ☐ more than 3 times per day
- ☐ not regularly every day

28. Bowel Movement Consistency

- ☐ soft & well formed
- ☐ often float
- ☐ difficult to pass
- ☐ diarrhea
- ☐ thin, long or narrow
- ☐ small and hard
- ☐ loose but not watery
- ☐ alternating between hard and loose

29. Bowel Movement Color

- ☐ medium brown
- ☐ very dark or black
- ☐ greenish
- ☐ blood is visible
- ☐ variable
- ☐ yellow, light brown
- ☐ chalky colored
- ☐ greasy, shiny

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

31. Have you ever had food poisoning? If yes, please describe in detail.

Medical Status

32. 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	
☐	☐	_____	Irritable Bowel Syndrome
☐	☐	_____	Crohn's
☐	☐	_____	Ulcertative Colitis
☐	☐	_____	Gastritis or Peptic Ulcer Disease
☐	☐	_____	GERD (reflex or heartburn)
☐	☐	_____	Celiac Disease
☐	☐	_____	SIBO

PAST	NOW	DATE	
☐	☐	_____	Gut infections
☐	☐	_____	Dysbiosis
☐	☐	_____	Leaky gut
☐	☐	_____	Food allergies, intolerances or reactions
☐	☐	_____	Gallstones
☐	☐	_____	Known absorption or assimilation issues
☐	☐	_____	Other

Cardiovascular

PAST	NOW	DATE	
☐	☐	_____	Heart attack
☐	☐	_____	Heart disease
☐	☐	_____	Stroke
☐	☐	_____	Elevated cholesterol
☐	☐	_____	Arrhythmia (irregular) heartbeat)

PAST	NOW	DATE	
☐	☐	_____	Hypertension (high blood pressure)
☐	☐	_____	Rheumatic Fever
☐	☐	_____	Mitral Valve Prolapse
☐	☐	_____	Other

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

Hormones/Metabolic

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Type 1 Diabetes	☐	☐	_____	Endocrine problems
☐	☐	_____	Type 2 Diabetes	☐	☐	_____	Polycycstic Overian Syndrome (PCOS)
☐	☐	_____	Hypoglycemia	☐	☐	_____	Infertility
☐	☐	_____	Metabolic Syndrome	☐	☐	_____	Weight gain
☐	☐	_____	Insulin Resistance or Pre-Diabetes	☐	☐	_____	Weight loss
☐	☐	_____	Hypothyroidism (overactive thyroid)	☐	☐	_____	Frequent weight fluctuations
☐	☐	_____	Hashimoto's (autoimmune hypothyroid)	☐	☐	_____	Eating disorder
☐	☐	_____	Grave's Disease (autoimmune hyperthyroid)	☐	☐	_____	Menopause difficulties
				☐	☐	_____	Hair Loss
				☐	☐	_____	Other

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

Cancer

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Lung Cancer	☐	☐	_____	Prostate Cancer
☐	☐	_____	Breast Cancer	☐	☐	_____	Skin Cancer (Melanoma)
☐	☐	_____	Colon Cancer	☐	☐	_____	Skin Cancer (Squamous,) Basal)
☐	☐	_____	Ovarian Cancer	☐	☐	_____	Other

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

Genital & Urinary Systems

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Kidney Stones	☐	☐	_____	Interstitial Cystitis
☐	☐	_____	Gout	☐	☐	_____	Frequent urinary tract infections
☐	☐	_____	Erectile Dysfunction or Sexual Dysfunction	☐	☐	_____	Frequent Yeast Infections
				☐	☐	_____	Other

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

Balance Health SOLUTIONS

Musculoskeletal/Pain

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Osteoarthritis	☐	☐	_____	Sore muscles or joints, undiagnosed
☐	☐	_____	Fibromyalgia				
☐	☐	_____	Chronic Pain	☐	☐	_____	Other

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

Immune/Inflammatory

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

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

Respiratory Conditions

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Asthma	☐	☐	_____	Sleep Apnea
☐	☐	_____	Chronic Sinusitis	☐	☐	_____	Frequent or recurrent Colds/Flus
☐	☐	_____	Bronchitis				
☐	☐	_____	Emphysema	☐	☐	_____	Other

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

Balance Health SOLUTIONS

Skin Conditions

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Eczema	☐	☐	_____	Acne
☐	☐	_____	Psoriasis	☐	☐	_____	Skin Cancer (Melanona)
☐	☐	_____	Dermatitis	☐	☐	_____	Skin Cancer (Squamous, Basal)
☐	☐	_____	Hives				
☐	☐	_____	Rash, undiagnosed	☐	☐	_____	Other

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

Neurologic/Mood

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Depression	☐	☐	_____	Memory Problems
☐	☐	_____	Anxiety	☐	☐	_____	Parkinson's Disease
☐	☐	_____	Bipolar Disorder	☐	☐	_____	Multiple Sclerosis
☐	☐	_____	Schizophrenia	☐	☐	_____	ALS
☐	☐	_____	Headaches	☐	☐	_____	Seizures
☐	☐	_____	Migraines	☐	☐	_____	Alzheimer's
☐	☐	_____	ADD/ADHD	☐	☐	_____	Concussion/Traumatic Brain Injury
☐	☐	_____	Autism				
☐	☐	_____	Mild Cognitive Impairment	☐	☐	_____	Other

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

Miscellaneous

PAST	NOW	DATE		PAST	NOW	DATE	
☐	☐	_____	Anemia	☐	☐	_____	Mumps
☐	☐	_____	Chicken Pox	☐	☐	_____	Whooping Cough
☐	☐	_____	German Measles	☐	☐	_____	Tuberculosis
☐	☐	_____	Measles	☐	☐	_____	Other
☐	☐	_____	Mononucleosis				

33. 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

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

35. Are you or have you been exposed to second-hand smoke?

36. 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?)

Lifestyle History

37. 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.

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

39. How do you handle stress?

Sleep History

40. Are you satisfied with your sleep?

41. Do you stay awake all day without dozing?

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

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

For Women Only

44. How old were you when you first got your period?

45. Do/did you have PMS? Painful periods? If so, explain.

46. In the second half of your cycle do you experience any symptoms of breast tenderness, water retention or irritability?

47. Have you experienced any yeast infections or urinary tract infections? Are they regular?

48. Have you/do you still take birth control pills: If so, please list length of time and type.

49. Have you had any problems with conception or pregnancy?

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

Mental Health Status

51. How are your moods in general? Do you experience more anxiety, depression or anger than you would like?

52. On a scale of 1–10, one being the worst and 10 being the best, describe your usual level of energy.

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

Other

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

55. 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.

56. Who in you family will be most supportive of you making dietary change?

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

58. What are your health goals and aspirations?

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