

#### **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.

At Functional Nutrition Alliance, we are committed to providing compassionate and effective care to all individuals seeking our Functional Nutrition clinical services. Our mission is to empower our clients to achieve their optimal health and we firmly believe that this journey should be accessible to everyone, regardless of their background, identity, or circumstances.

We adhere to the principles of inclusivity, diversity, and respect for all. We do not discriminate on the basis of age, race, ethnicity, physical ability or attributes, body size or weight, religion, sexual orientation, gender identity, or gender expression. We are dedicated to creating a safe, welcoming, and inclusive environment for every individual who walks through our doors.

Our commitment to inclusivity extends to every aspect of our practice including personalized care, cultural sensitivity, accessibility, confidentiality, non-discrimination, input and feedback on improvement. By choosing Functional Nutrition Alliance you are choosing a provider that values your history and identity and is dedicated to helping you achieve your health goals in an inclusive and respectful environment.

We look forward to partnering with you on your journey to optimal health.

#### Client Information

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



## History

Age	Bir	_ Birth date			
Heritage (please specify more in	formation if you'd like)				
□ American Indian /	□ Pacific Islander	□ Mixed-Race			
Alaska Native	□ White	□ Other			
□ Asian	□ Latinx	□ Prefer not to answer			
□ Black					
Principle language					
□ English	□ Spanish	□ Other (please specify)			
Birth weight (if known)					
Birth order (please list ages of bi					
Gender at birth					
Pronouns (she/her, he/him, they	/them, other)				
Gender identity:					
□ Male	□ Transgender female /	□ Another identity			
□ Female	woman	□ Prefer not to answer			
□ Non-binary	□ Transgender male / ma	n			
Sexual orientation:					
	□ Bisexual	□ Another exicutation			
□ Straight		☐ Another orientation			
□ Lesbian	□ Asexual	□ Prefer not to answer			
□ Gay	□ Questioning				
Height	Blood type (if know	n)			
Weight (optional)	Weight one year ago (options	al)			



Relationsh	aip status (check all that ap	ply	r):		
	Single Married or living with partner		Partnered, not living together Divorced		Widowed Other
Partner's p	oronouns (she/her, he/him,	, th	ey/them, other)		
If you have	e children, please list their	age	e/ages		
Have you o	or your family recently exp	peri	enced any major life chang	es?]	If so, please comment:
Occupatio	n				
Have you l	lived or traveled outside of	f th	e United States? If so, when	and	d where?:



#### Medical Status

1. 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		PAST	NOW	DATE	
			Irritable Bowel		□ .		Gut infections
			Syndrome			 	Dysbiosis
			Crohn's				Leaky gut
			Ulcertative Colitis		Π.		Food allergies, intolerances
			Gastritis or Peptic Ulcer				or reactions
			Disease				Gallstones
			GERD (reflux or heartburn)				Known absorption or
			Celiac Disease				assimilation issues
			SIBO		□ .		Other

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

#### Cardiovascular

PAST NOW	DATE		PAST	NOW	,	DATE	
		Heart attack					Hypertension (high blood
		Heart Disease					pressure)
		Stroke					Rheumatic Fever
		Elevated cholesterol					Mitral Valve Prolapse
		Arrhythmia (irregular					Other

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



Н	orm	ones/Met	tabolic				
PAST	NOW	DATE	Type 1 Diabetes	PAST	NOW	DATE	Endocrine problems
			Type 2 Diabetes				Polycystic Ovarian Syndrome (PCOS)
			Hypoglycemia  Matabalia Sandrama				Infertility
			Metabolic Syndrome				Weight gain
			Insulin Resistance or Pre- Diabetes				Weight loss
			Hypothyroidism (low thyroid)				Frequent weight fluctuations
			Hyperthyroidism				Eating disorder
			(overactive thyroid)				Menopause difficulties
			Hashimoto's (autoimmune				Hair loss
			hypothyroid)				Other
			Grave's Disease (autoimmune hyperthyroid)				
			scribe your symptoms, chosen tr	reatm	ient(	s) and date	es:
Ca	nce	r					
PAST		DATE	I C		NOW	DATE	December Constant
			Lung Cancer				Prostate Cancer
			Breast Cancer				Skin Cancer (Melanoma)
			Colon Cancer				Skin Cancer (Squamous, Basal)
			Ovarian Cancer	П	П		•
Dle	220	hrieffy des	scribe your symptoms, chosen tr				
116	ase	orieny des	eribe your symptoms, chosen n	catii	ieiit(	s) and date	.5.

PAST NOW DATE

□ □ \_\_\_\_\_ Gout

Genital & Urinary Systems

□ □ \_\_\_\_\_ Kidney Stones

PAST NOW DATE



			Frequent urinary tract				Interstitial Cystitis
			infections				Frequent Yeast Infections
			Erectile Dysfunction or Sexual Dysfunction				Other
Pl	ease	briefly des	cribe your symptoms, chosen t	reatm	ent(	s) and date	es:
		•			Ì	•	
M	usci	uloskeletal	/Pain				
PAST	NOW	DATE		PAST	NOW	DATE	
			Osteoarthritis				Sore muscles or joints,
			Fibromyalgia				undiagnosed
			Chronic Pain				Other
ם.		hrioffer doo	cribe your symptoms, chosen t	· v o o t vo	on+(	a) and date	
In	ımu	ıne/Inflam	ımatory				
	ımu now		ımatory	PAST	NOW	DATE	
			nmatory Chronic Fatigue	PAST	NOW	DATE	Environmental allergies
PAST	NOW		•			DATE	
PAST	NOW		Chronic Fatigue				Environmental allergies Multiple chemical sensitivities
PAST	now		Chronic Fatigue Syndrome				Multiple chemical sensitivities
PAST	NOW	DATE	Chronic Fatigue Syndrome Rheumatoid Arthritis				Multiple chemical sensitivities
PAST	NOW	DATE	Chronic Fatigue Syndrome Rheumatoid Arthritis Lupus SLE				Multiple chemical sensitivities Latex allergy
PAST	NOW	DATE	Chronic Fatigue Syndrome Rheumatoid Arthritis Lupus SLE Raynaud's Psoriasis				Multiple chemical sensitivities Latex allergy Hepatitis Lyme (and co-infections)
PAST	NOW	DATE	Chronic Fatigue Syndrome Rheumatoid Arthritis Lupus SLE Raynaud's				Multiple chemical sensitivities  Latex allergy  Hepatitis
PAST	NOW	DATE	Chronic Fatigue Syndrome Rheumatoid Arthritis Lupus SLE Raynaud's Psoriasis Mixed Connetive Tissue				Multiple chemical sensitivities Latex allergy Hepatitis Lyme (and co-infections) Chronic Infections (Epstein-Barr, Cytomegalovirus, Herpes, HPV, STIs,
PAST	Now	DATE	Chronic Fatigue Syndrome Rheumatoid Arthritis Lupus SLE Raynaud's Psoriasis Mixed Connetive Tissue Disease (MCTD)				Multiple chemical sensitivities Latex allergy Hepatitis Lyme (and co-infections) Chronic Infections (Epstein-Barr, Cytomegalo-
PAST	Now	DATE	Chronic Fatigue Syndrome Rheumatoid Arthritis Lupus SLE Raynaud's Psoriasis Mixed Connetive Tissue Disease (MCTD) Poor immune function				Multiple chemical sensitivities Latex allergy Hepatitis Lyme (and co-infections) Chronic Infections (Epstein-Barr, Cytomegalovirus, Herpes, HPV, STIs,



Respir	atory Co	nditions				
PAST NOW	DATE		PAST	NOW	DATE	
		Asthma		□ .		Sleep Apnea
		Chronic Sinusitis		□ .		Frequent or recurrent
		Bronchitis				Colds/Flus
		Emphysema		□ .		Other
		Pneumonia				
Please	briefly des	cribe your symptoms, ch	osen treatm	ent(s	s) and date	es:
Skin (	Condition	LS .				
PAST NOW	DATE		PAST	NOW	DATE	
		Eczema		□ .		Acne
		Psoriasis		□ .		Skin Cancer (Melanoma)
		Dermatitis		□ .		Skin Cancer (Squamous,
		Hives				Basal)
		Rash, undiagnosed		□ .		Other
	briefly des	ecribe your symptoms, ch	osen treatm	ent(s	s) and dat	es:
		od				
PAST NOW	DATE	Depression	PAST		DATE	Autism
		π · .				
		Bipolar Disorder				2.6
		Schizophrenia				
		- 1 1				
		Migraines				

□ □ \_\_\_\_\_ Seizures

□ □ \_\_\_\_\_ ADD/ADHD



		_ Concussion/Traumatic				_ Alzh	eimer's
		Brain Injury		□ _		_ Othe	r
	Please briefly des	scribe your symptoms, choser	n treatm	nent(s	s) and dat	es:	
	Miscellaneous						
	PAST NOW DATE		PAST	NOW	DATE		
		_ Anemia					
		_ Chicken Pox					oping Cough
		_ German Measles					
	<b>-</b>			□ .			vn genetic variants
		_ Mononucleosis				•	s, polymorphisms, etc)
				□ -		_ Othe	1
2.	Please check free	quency of the following:					
	Short term memo				□ yes	□ no	□ sometimes
	Shortened focus	of attention and ability to cor	icentrat	:e	□ yes	□ no	□ sometimes
	Coordination and	d balance problems			□ yes	□ no	□ sometimes
	Problems with la	ck of inhibition			□ yes	□ no	□ sometimes
	Poor organization	n abilities			□ yes	□ no	□ sometimes
	Problems with ti	me management (late or forg	et appts	3)	□ yes	□ no	□ sometimes
	Mood instability				□ yes	□ no	□ sometimes
	Difficulty unders	tanding speech and word find	ding		□ yes	□ no	□ sometimes
	Brain fog, brain f	atigue			□ yes	□ no	□ sometimes
	Lower effectivene	ess at work, home or school			□ yes	□ no	□ sometimes
	Judament proble	ems like leaving the stove on.	etc		□ ves	□ no	□ sometimes



#### Stressful Life Events

Studies show that past and continued traumas play a significant role in health and health outcomes. Our understanding of your history helps us to best support you throughout this process and moving forward.

3.	Have you experienced one or more of these stressful life events or traur	nas in yo	ur 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

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, in	ncluding 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	? Please explain.
9.	What other health practitioners are you currently seeing?	PList name, specialty below.
10.	. Please list the date and description of any surgical proced reduction or augmentation, gall bladder removal, and any	



11.	How much time have you had to take off from work or school for health related reasons in the last year? (add details if you can)							
	□ 0 to 2 days	□ 3 to 14 days	□ more than 15 days					
12.	How often did you take antibiotics in	infancy/childhood?						
13.	How often have you taken antibiotics	s as a teen?						
14.	How often have you taken antibiotics	s as an adult?						
15.	List any medicine you are currently to	aking:						
16.	List all vitamins, minerals, herbs and	nutritional supplements you a	re now taking:					



## **Nutritional Status**

17.	Which of the following foods do you	COI	nsume regularly?		
	□ soda		alcohol		dairy (milk, cheese,
	□ diet soda		gluten (wheat, rye,		yogurt)
	□ refined sugar		barley)		coffee
			fast food		
18.	Are you currently on a special diet?				
	□ autoimmune paleo		vegan		gluten-free
	(AIP)		paleo		ketogenic diet
	□ SCD/GAPS		blood type		intermittent fasting
	□ dairy restricted or dairy-		raw		Other (please describe)
	free		refined sugar-free		
	□ vegetarian				
19.	What percentage of your meals are h	.om	ne-cooked?		
	□ 10 □ 30		□ 50		70 🗆 90
	□ 20 □ 40		□ 60		80 🗆 100
20.	Are there any foods that you avoid be If yes, please name the food and the			u f	eel?
21.	Do you have symptoms immediately Do you have any known food allergie				_



22.	Are you aware of any delayed symptoms after eating certain foods such as fatigue, muscle aches, sinus congestion, etc? If so, please explain:
23.	Are there foods that you crave? If so, please explain:
24.	Describe your diet at the onset of your health concerns:
25.	Do you have any known food allergies or sensitivities?
26.	Is there anything else we should know about your current diet, history or relationship to food?



### **Intestinal Status**

27. Bo	wel movement frequency		
	□ 1–3 times per day	□ more than 3 times per day	□ not regularly every day
28. Bo	wel movement consistency		
	□ soft & well formed	□ diarrhea	□ loose but not watery
	□ often float	□ thin, long or narrow	□ alternating between
	□ difficult to pass	□ small and hard	hard and loose
29. Bo	wel movement color		
	□ medium brown	□ blood is visible	□ chalky colored
	□ very dark or black	□ variable	□ greasy, shiny
	□ greenish	□ yellow, light brown	
30. Do	you experience intestinal gas?	If so, please explain if it is exce	essive, occasional, odorous, etc:
	ve you ever had food poisoning What did you treat it with and 3		ail, including 1) Where were you
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## Potential Health Hazards

32. To your knowledge, have you been exposed to any chemicals or toxic metals (lead, mercury arsenic, aluminum)?	γ,
33. Do odors affect you?	
34. Are you or have you been exposed to second-hand smoke?	
35. 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?)	
36. Have you used or abused alcohol, drugs, meds, tobacco or caffeine? Do you still?	
Oral Health History	
37. How long since you last visited the dentist? What was the reason for that visit?	



38.	In the past 12 months has a dentist or hygienist talked to you about your oral health, blood sugar or other health concerns? (Explain.)
39.	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.)
40.	Do you have any mercury amalgams? (If no, were they removed? If so, how?)
41.	Have you had any root canals? (If yes, how many and when?)
42.	Do you have any concerns about your oral or dental health? (gums bleed after flossing, receding gums)
43.	Is there anything else about your current oral or dental health or health history that you'd like us to know?



# Sleep History

44.	Are you satisfied with your sleep?
45.	Do you stay awake all day without dozing?
46.	Are you asleep (or trying to sleep) between 2:00 a.m. and 4:00 a.m.?
47.	Do you fall asleep in less than 30 minutes?
48.	Do you sleep between 6 and 8 hours per night?
49.	Is there anything else you would like us to know about your sleep?



# Reproductive Hormone History

If you do not have female reproductive organs please skip to question 57.	
50. How old were you when you first got your period?	
51. How are/were your menses? Do/did you have PMS? Painful periods? If so, explain.	
52. In the second half of your cycle do you experience any symptoms of breast tenderness, water retention or irritability?	
53. Have you experienced any yeast infections or urinary tract infections? Are they regular?	
54. Have you/do you still take birth control pills: If so, please list length of time and type.	
55. Have you had any problems with conception or pregnancy?	



56.	Are you taking any hormone replacement therapy or hormonal supportive herbs? If so, please list again here.
Me	ental Health Status
57.	How are your moods in general? Do you experience more anxiety, depression or anger than you would like?
58.	On a scale of 1–10, one being the worst and 10 being the best, describe your usual level of energy.
59.	At what point in your life did you feel best? Why?



### Other

60.	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.
61.	Who in your family or on your health care team will be most supportive of you making dietary change?
62.	What role does spirituality play in your life?
63.	Please describe any other information you think would be useful in helping to address your health concern(s):