

Patient Intake – Functional Medicine

Patient Information

☐ Previous Medical Records and/or Labs

	Middle	Last	
Street Address	City	State	Zip
Cell Phone	Home Phone	E-mail Add	ress (for Appointment Reminde
Status: \square Single \square Married \square Div	orced 🗆 Partner 🗆 Widowed		
Spouse/Partner Name	Spouse/Partner DOB		
Emergency Contact	Phone		Relationship
Who referred you? How did you hear abo	ut us? *Ask about our Referral Program!		
	a. a		
	ou are authorizing you have read and underst		ights.
Full HIPAA Privacy Disclosure is available o	at the front desk or online at HeartlandWellne	essCenter.com.	
HIPAA Signature			
	act information I provided above. he above statement and agree to communic	ations.	
Please Initial you have read t Authorized Parties: Who do yo appointment, payments, insurance inform	he above statement and agree to communic ou authorize HCWC to provide your private he mation, etc.		tion regarding your
Please Initial you have read t Authorized Parties: Who do yo appointment, payments, insurance inform	he above statement and agree to communicate au authorize HCWC to provide your private he mation, etc. DOB		tion regarding your
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HEALTH HISTORY				
N			D (D:)	T / D
•		·	d Divorced	☐ Widow(er)
	r flu? Are you p	regnant?		D
Reason for office visit:	Doe of Birth	Date began:		
,, ,,				. 🗇
	-	·		•
Current medications (prescription)				
р. сол. последнени	o. o.o			
Major Hospitalizations, Surgeries,	Iniuries: Please list all procedur	res, complications (if any) and	dates:	
	·	os, complications (ii arry) and		
Tear Jorgery, Illiess, II	ijoi y		Oucome	
		10 /1 h-:	2 2 4 5	6 7 8 9 10
,	•			
Is your job associated with potentic	ally harmful chemicals (e.g., pesti	cides, radioactivity, solvents) c	r health and/or life threatening act	ivities (e.g., fireman, farmer, miner)?
			/	
Corrective lenses	→ Dentures → Hearing air	d Medical devices,	'prosthetics/implants, describe: _	
Recent changes in your ability to:	☐ see ☐ hec	ar 🔲 taste	□ smell □ feel	hot/cold sensations
move around (sit upright	, stand, walk, run, pick up thin	gs, swing your arms freely, t	urn your head, wiggle fingers)	
Strong like for any of the following	g flavors:	□ bitter □ sweet	☐ rich/fatty ☐ spicy/punge	nt 🔲 salty
,		□ bitter □ sweet		_ '
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			lang years for all the superest on years assume	ntono ara anaravatad.
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				·
☐ 1 a.m 3 a.m. ☐ 3 a.	m. – 5 a.m. 🔲 5 a.m. – 7 a.			
Do you experience any of these	general symptoms EVERY DAY	?		
☐ Debilitating fatigue	☐ Shortness of breath	☐ Insomnia	☐ Constipation	$oxedsymbol{\square}$ Chronic pain/inflammation
☐ Depression		☐ Nausea		☐ Bleeding
☐ Disinterest in sex		· ·	•	☐ Discharge
☐ Disinterest in eating	Dizziness	☐ Diarrhea	☐ Low grade fever	☐ Itching/rash

Medical History		Health Habits	Current Supplements
☐ Arthritis	Decreased sex drive	☐ Tobacco:	☐ Multivitamin/mineral
☐ Allergies/hay fever	☐ Infertility	Cigarettes: #/day	☐ Vitamin C
☐ Asthma	☐ Sexually transmitted disease	Cigars: #/day	☐ Vitamin E
☐ Alcoholism	Other	☐ Alcohol:	□ EPA/DHA
☐ Alzheimer's disease		Wine: #glasses/d or wk	3
Autoimmune disease	AAodiaal (Waman)	Liquor: #ounces/d or wk Beer: #glasses/d or wk	
☐ Blood pressure problems	Medical (Women)	Caffeine:	☐ Magnesium☐ Zinc
☐ Bronchitis	☐ Menstrual irregularities☐ Endometriosis	Coffee: #6 oz cups/d	
Cancer	☐ Infertility	Tea: #6 oz cups/d	☐ Minerals, describe ☐ Friendly flora (acidophilus)
☐ Chronic fatigue syndrome	☐ Fibrocystic breasts	Soda w/caffeine: #cans/d	☐ Digestive enzymes
☐ Carpal tunnel syndrome	☐ Fibroids/ovarian cysts	Other sources	Amino acids
☐ Cholesterol, elevated☐ Circulatory problems	☐ Premenstrual syndrome (PMS)	☐ Water: #glasses/d	☐ CoQ10
Colitis	☐ Breast cancer		
☐ Dental problems	☐ Pelvic inflammatory disease	Exercise	Antioxidants (e.g., lutein, resveratrol, etc.)
Depression	☐ Vaginal infections	☐ 5-7 days per week	☐ Herbs - teas
☐ Diabetes	Decreased sex drive	☐ 3-4 days per week	☐ Herbs - extracts
Diverticular disease	Sexually transmitted disease	1-2 days per week	Chinese herbs
☐ Drug addiction	Other	45 minutes or more duration per workout	Ayurvedic herbs
☐ Eating disorder	Age of first period	☐ 30-45 minutes duration per workout	☐ Homeopathy
☐ Epilepsy	Date of last gynecological exam	Less than 30 minutes	☐ Bach flowers
☐ Emphysema	Mammogram	☐ Walk	Protein shakes
☐ Eyes, ears, nose, throat problems	PAP	Run, jog, jump rope	 Superfoods (e.g., bee pollen, phytonutrient blends)
☐ Environmental sensitivities	Form of birth control	☐ Weight lift	☐ Liquid meals
☐ Fibromyalgia	# of children # of pregnancies	☐ Swim	Other
☐ Food intolerance	C-section	☐ Box	
☐ Gastroesophageal reflux disease	☐ Surgical menopause	☐ Yoga	Would you like to:
☐ Genetic disorder	☐ Menopause		☐ Have more energy
☐ Glaucoma	Date of last menstrual cycle	Nutrition & Diet	☐ Be stronger
Gout	Length of cycle days	 Mixed food diet (animal and vegetable sources) 	☐ Have more endurance
☐ Heart disease	Interval of time between cycles	☐ Vegetarian	☐ Increase your sex drive
☐ Infection, chronic	days	☐ Vegan	☐ Be thinner
☐ Inflammatory bowel disease	Any recent changes in normal men- strual flow (e.g., heavier, large clots,	☐ Salt restriction	☐ Be more muscular
☐ Irritable bowel syndrome	scanty)	☐ Fat restriction	☐ Improve your complexion
☐ Kidney or bladder disease		☐ Starch/carbohydrate restriction	☐ Have stronger nails
Learning disabilities	Family Health History	☐ The Zone Diet	☐ Have healthier hair
Liver or gallbladder disease (stones)	(Parents and Siblings)	☐ Total calorie restriction	☐ Be less moody
☐ Mental illness	☐ Arthritis	Specific food restrictions:	☐ Be less depressed
☐ Mental retardation	☐ Asthma	☐ dairy ☐ wheat ☐ eggs	☐ Be less indecisive
☐ Migraine headaches	☐ Alcoholism	soy corn all gluten	☐ Feel more motivated
□ Neurological problems	☐ Alzheimer's disease	Other	Be more organized
(Parkinson's, paralysis)	☐ Cancer	Food Frequency	Think more clearly and be more
☐ Sinus problems	Depression	Servings per day:	focused
☐ Stroke	Diabetes	Fruits (citrus, melons, etc.)	☐ Improve memory☐ Do better on tests in school
☐ Thyroid trouble☐ Obesity	Drug addiction	Dark green or deep yellow/orange	☐ Not be dependent on over-the-
Osteoporosis	☐ Eating disorder	vegetables	counter medications like aspirin,
Pneumonia	Genetic disorder	Grains (unprocessed)	ibuprofen, anti-histamines, sleeping
☐ Sexually transmitted disease	Glaucoma	Beans, peas, legumes	aids, etc.
☐ Seasonal affective disorder	Heart disease	Dairy, eggs Meat, poultry, fish	 Stop using laxatives or stool softeners
☐ Skin problems	☐ Infertility	Medi, poolily, listi	☐ Be free of pain
☐ Tuberculosis	☐ Learning disabilities ☐ Mental illness	Eating Habits	☐ Sleep better
☐ Ulcer	☐ Mental retardation	☐ Skip breakfast	☐ Have agreeable breath
☐ Urinary tract infection	☐ Migraine headaches	☐ Two meals/day	☐ Have agreeable body odor
☐ Varicose veins	☐ Neurological disorders	☐ One meal/day	☐ Have stronger teeth
Other	(Parkinson's, paralysis)	Graze (small frequent meals)	Get less colds and flus
	Obesity	☐ Food rotation	☐ Get rid of your allergies
	Osteoporosis	 Eat constantly whether hungry or not 	☐ Reduce your risk of inherited dis-
Medical (Men)	☐ Stroke	Generally eat on the run	ease tendencies (e.g., cancer, heart disease, etc.)
☐ Benign prostatic hyperplasia (BPH)	Suicide	Add salt to food	noan albado, ole.j
☐ Prostate cancer	Other		

Metabolic Assessment Form™

Name:		Age:	Sex:	_ Date:	
PART I					
Please list	your 5 major health concerns in ord	ler of importance:			
1		NE			
2.					
3.					
4.					
5					
PART II	Please circle the appropriate numb	er on all questions belo	w.		

PART II Please circle the appropriate number on all questions below. 0 as the least/never to 3 as the most/always.

Category I				
Feeling that bowels do not empty completely	0	1	2	3
Lower abdominal pain relieved by passing stool or gas	0	1	2	3
Alternating constipation and diarrhea	0	1	2	3
Diarrhea	0	1	2	3
Constipation	0	1	2	3
Hard, dry, or small stool	0	1	2	3
Coated tongue or "fuzzy" debris on tongue	0	1	2	3
Pass large amount of foul-smelling gas	0	1	2	3
More than 3 bowel movements daily	0	1	2	3
Use laxatives frequently	0	1	2	3
Category II				
Increasing frequency of food reactions	0	1	2	3
Unpredictable food reactions	0	1	2	3
Aches, pains, and swelling throughout the body	0	1	2	3
Unpredictable abdominal swelling	0	1	2	3
Frequent bloating and distention after eating	0	1	2	3
Abdominal intolerance to sugars and starches	0	1	2	3
Category III				
Intolerance to smells	0	1	2	3
Intolerance to jewelry	0	1	2	3
Intolerance to shampoo, lotion, detergents, etc	0	1	2	3
Multiple smell and chemical sensitivities	0	1	2	3
Constant skin outbreaks	0	1	2	3
Category IV				
Excessive belching, burping, or bloating	0	1	2	3
Gas immediately following a meal	0	1	2	3
Offensive breath	0	1	2	3
Difficult bowel movements	0	1	2	3
Sense of fullness during and after meals	0	1	2	3
Difficulty digesting fruits and vegetables;				
undigested food found in stools	0	1	2	3
Category V				
Stomach pain, burning, or aching 1-4 hours after eating		1	2 2	3
Use of antacids	0	1	2	3
Feel hungry an hour or two after eating	0	1	2	3
Heartburn when lying down or bending forward Temporary relief by using antacids, food, milk, or	0	1	2	3
carbonated beverages	0	1	2	3
Digestive problems subside with rest and relaxation	0	1	2	3
Heartburn due to spicy foods, chocolate, citrus,				
peppers, alcohol, and caffeine	0	1	2	3
Category VI				
Roughage and fiber cause constipation	0	1	2	3
Indigestion and fullness last 2-4 hours after eating	0	1	2	3
Pain, tenderness, soreness on left side under rib cage	0	1	2	3
Excessive passage of gas	0	1	2	3

-					
	Category VI (Cont.) Nausea and/or vomiting	0	1	2	3
	Stool undigested, foul smelling, mucus like,	-		12	9
	greasy, or poorly formed	0	1	2	3
	Frequent urination	0	1	2	3
	Increased thirst and appetite	0	1	2	3
	Category VII				
	Greasy or high-fat foods cause distress	0	1	2	3
	Lower bowel gas and/or bloating several hours				
	after eating	0	1	2	3
	Bitter metallic taste in mouth, especially in the morning	0	1		3
	Burpy, fishy taste after consuming fish oils	0	1	2	3
	Difficulty losing weight	0	1	2	3
	Unexplained itchy skin	0	1	2	3
	Yellowish cast to eyes	0	1	2	3
	Stool color alternates from clay colored to				
	normal brown	0	1	2	3
	Reddened skin, especially palms	0	1	2	3
	Dry or flaky skin and/or hair	0	1	2	3
	History of gallbladder attacks or stones	0	1	2	3
	Have you had your gallbladder removed?		Yes	N	0
	Category VIII				
	Acne and unhealthy skin	0	1	2	2
	Excessive hair loss	0	1	2	3
	Overall sense of bloating	0		2	3
	Bodily swelling for no reason	- 55	1	2 2	3
	Hormone imbalances	0	1	2	3 3
	Weight gain	0	1		3
	Poor bowel function	0	1	2	3
	Excessively foul-smelling sweat	0	1	2	3
		0	1	2	3
	Category IX				
	Crave sweets during the day	0	1	2	3
	Irritable if meals are missed	0	1	2	3
	Depend on coffee to keep going/get started	0	1	2	3
	Get light-headed if meals are missed	0	1	2	3 3 3 3 3 3
	Eating relieves fatigue	0	1	2	3
	Feel shaky, jittery, or have tremors	0	1	2	3
	Agitated, easily upset, nervous	0	1	2	3
	Poor memory/forgetful	0	1	2	3
	Blurred vision	0	1	2	3
	Category X				
	Fatigue after meals	0	1	2	3
	Crave sweets during the day	0	1	2	3
	Eating sweets does not relieve cravings for sugar	0	1	2	3
	Must have sweets after meals	0	1	2 2 2 2 2 2 2	3 3 3 3 3 3
	Waist girth is equal or larger than hip girth	0	1	2	3
	Frequent urination	0	1	2	3
	Increased thirst and appetite	0	1		3
	Difficulty losing weight	0	1	2	3

Category XI		9	1	
Cannot stay asleep	0	1	2	
Crave salt	0	1	2	
Slow starter in the morning	0		2	
Afternoon fatigue	0		2	
Dizziness when standing up quickly	0		2	
Afternoon headaches	0		2	
Headaches with exertion or stress	0	-		
Weak nails	0	1	2	3
Category XII				
Cannot fall asleep	0	1	2	3
Perspire easily	0	1		
Under a high amount of stress	0		2	
Weight gain when under stress	0			
Wake up tired even after 6 or more hours of sleep	0	1	2	3
Excessive perspiration or perspiration with little	o	٠	-	
or no activity	0	1	2	3
Category XIII	•		-	120
Edema and swelling in ankles and wrists	0	1	2	
Muscle cramping	0	1		
Poor muscle endurance	0			3
Frequent urination	0	1		3
Frequent thirst	0	1		3
Crave salt	0	-		
Abnormal sweating from minimal activity	0			
Alteration in bowel regularity	0	1	200	3
Inability to hold breath for long periods	0			3
Shallow, rapid breathing	0	1	2	3
Category XIV				
Tired/sluggish	0	1	2	3
Feel cold—hands, feet, all over	0	1	2	3
Require excessive amounts of sleep to function properly	0		2	3
Increase in weight even with low-calorie diet	0	1		3
Gain weight easily	0	1		3
Difficult, infrequent bowel movements	0			
Depression/lack of motivation	0	_		
Morning headaches that wear off as the day progresses	0	1		3
Outer third of eyebrow thins	0	1	2	3
Thinning of hair on scalp, face, or genitals, or excessive	U	÷	-	3
hair loss	0	1	2	3
Dryness of skin and/or scalp	0	1	2	3
Mental sluggishness	0	1	2	3
		ै	-	*
Category XV	1053	52	3350	(34)
Heart palpitations	0	1	2	3
Inward trembling	0	1	2	3
Increased pulse even at rest	0	1	2	3
Nervous and emotional	0	1	2	3
Insomnia	0	1	2	3

Category XV (Cont.) Night sweats Difficulty gaining weight Difficulty spaining weight Difficulty spaining weight Difficulty spaining weight Difficulty spaining weight Difficulty or dribbling Difficulty of Degress of Degress or Not on the past Difficulty maintaining moming erections Difficulty of Difficulty of Difficulty and Difficulty of Difficulty of Difficulty and Difficulty of Difficulty of Difficulty and Difficulty of Difficul					
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5				2	
Mood swings				2	3
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mercased vaginar pain, dryness, or itening 0 1 2 3		0	1	2	3

PARI III	
How many alcoholic beverages do you consume per week?	Rate your stress level on a scale of 1-10 during the average week:
How many caffeinated beverages do you consume per day?	How many times do you eat fish per week?
How many times do you eat out per week?	How many times do you work out per week?
How many times do you eat raw nuts or seeds per week?	
List the three worst foods you eat during the average week:	······································
List the three healthiest foods you eat during the average week:	

PART IV

Please list any medications you currently take and for what conditions:

Please list any natural supplements you currently take and for what conditions:



Naı	meAge	Sex	Date	e		
of p	ess is a normal part of life. Every day, we're faced with stimuli, called stressors, which can elicit the ohysiological reactions and resulting in emotions ranging from mild to intense. But while occasion ess can be harmful.					-
	ase take a few moments to discover your body's response to situations you perceive as stressful. I vider can create a natural stress relief program for your individual needs.	3y honestly assessing h	ow yo	ou fe	el, yc	our healthcare
Dir	ections:					
	ase read each statement and circle the number 0, 1, 2, or 3 that best describes your feelings or rea	actions throughout the o	course	e of t	he d	ay. Determine
sub	ototal score for each section, then determine the total scores for sections A-C and C-E. Some quest eason for each question. Don't spend much time on any one question.					
0 =	Never true 1= Seldom true 2= Sometimes true 3= Often true					
W	hen under stress for two weeks or longer, I					
Se	ection A:					
1.	Get wound up when I get tired and have trouble calming down		0	1	2	3
2.	Feel driven, appear energetic but feel "burned out" and exhausted				2	3
3.	Feel restless, agitated, anxious, and uneasy		0	1	2	3
4.	Feel easily overwhelmed by emotion		0	1	2	3
5.	Feel emotional — cry easily or laugh inappropriately		0	1	2	3
6.	Experience heart palpitations or a pounding in my chest		0	1	2	3
7.	Am short of breath			1	2	3
8.	Am constipated		0	1	2	3
9.	Feel warm, over-heated, and dry all over		0	1	2	3
10.	Get mouth sores or sore tongue			1	2	3
11.				1	2	3
12.				1	2	3
13.	Have trouble falling asleep and staying asleep			1	2	3
14.	Worry about high blood pressure, cholesterol, and triglycerides			1	2	3
15.				1	2	3
_		Total poin				,
Se	ection B:	Total point				
1.	Find myself worrying about things big and small		0	1	2	3
	Feel like I can't stop worrying, even though I want to				2	3
	Feel impulsive, pent up, and ready to explode				2	3
/i.	Get muscle spasms			1	2	3
5.	Feel aggressive, unyielding, or inflexible when pressed for time			1	2	3
6.	See, hear, and smell things that others do not			1	2	3
7.	Stay awake replaying the events of the day or planning for tomorrow			1	2	3
8.	Have upsetting thoughts or images enter my mind again and again			1	2	3
	Have a hard time stopping myself from doing things again and again,			-	_	J
٦.	like checking on things or rearranging objects over and over		0	1	2	3
10.	Worry a lot about terrible things that could happen if I'm not careful			1	2	3
	There's a feet about terrible armings that south happens in the feet of a feet arministration and the feet arministration arministration and the feet arministration and the feet arministration arministration arministration and the feet arministration and the feet arministration and	Total poin		-		-
Se	ection C:	ισται μοπι	15:			
1.	Have muscle and joint pains		. 0	1	2	3
2.	Have muscle weakness		. 0	1	2	3
3.	Crave salt or salty things		. О	1	2	3
4.	Have multiple points on my body that when touched are tender or painful		. 0	1	2	3
5.	Have dark circles under my eyes		. 0	1	2	3
6.	Feel a sudden sense of anxiety when I get hungry		. 0	1	2	3
7.	Use medications to manage pain			1	2	3
8.	Get dizzy when rising or standing up from a kneeling or sitting position			1	2	3
9.	Have diarrhea or bouts of nausea with or without vomiting for no apparent reason		0	1	2	3

10. Have headaches 0 1 2 3



Total points: _

Se	ection D:				
1.	Have trouble organizing my thoughts	С	1	2	3
2.	Get easily distracted and lose focus	С	1	2	3
3.	Have difficulty making decisions and mistrust my judgment	С	1	2	3
4.	Feel depressed and apathetic	Э	1	2	3
5.	Lack the motivation and energy to stay on task and pay attention	Э	1	2	3
6.	Am forgetful		1	2	3
7.	Feel unsettled, restless, and anxious		1	2	3
8.	Wake up tired and unrefreshed		1	2	3
9.	Experience heartburn and indigestion		1	2	3
9. 10.	Catch colds or infections easily		1	2	3
10.				2)
	Total points	S:			
Se	ction E:				
1.	Feel tired for no apparent reason		1	2	3
2.	Experience lingering mild fatigue after exertion or physical activity	С	1	2	3
3.	Find it difficult to concentrate and complete tasks	С	1	2	3
4.	Feel depressed and apathetic	Э	1	2	3
5.	Feel cold or chilled – hands, feet, or all over – for no apparent reason		1	2	3
6.	Have little or no interest in sex		1	2	3
7.	Sweat spontaneously during the day		1	2	3
8.	Feel puffy and retain fluids		1	2	3
9.	Sleep more than nine hours a night		1	2	3
9. 10.	Have poor muscle tone		1	2	-
	Have trouble losing weight		1		3
11.			1	2	3
12.	Wake up tired even though I seem to get plenty of sleep		1	2	3
13.	Have no energy and feel physically weak		1	2	3
14.	Am susceptible to colds and the flu		1	2	3
	Add points from sections A, B & C Total for A, B & C	:			
	Add points from sections C, D & E Total for C, D & E	:			
style	e and Health Status:				
-	Circle the level of stress you experience on the scale of 1-10, 10 being the worst:				
1.					
2.	1 2 3 4 5 6 7 8 9 10 What do you consider to be the major causes of your stress (for example — spouse, family, friends, work, finances, wedding the stress of the stress	ing, p	oreg	gnanc	ïy,
	legal, commute):				
3.	l eat breakfast times a week. My typical breakfast is:				
4.	I take a multiple vitamin/mineral days per week. I take a fish oil supplement days per week.	per w	/eek	ζ.	
5.	I participate in 30 minutes of physical activity such as walking, aerobics (e.g., running), resistance training (e.g., weights,	pilate	es),		
	sports (e.g. biking), or yoga:		,,		
	, , , , , , , , , , , , , , , , , , , ,	Less	s tha	an or	ice a v
6.	I smoke cigarettes daily.				
7.	I drink two or more 8 ounce cups of caffeinated coffee or other caffeinated beverages like energy/diet drinks, colas, or bla	ack o	r gr	een t	eas:
	☐ Daily ☐ 5-6 times per week ☐ 3-4 times per week ☐ 1-2 times per week ☐	Less	s tha	an or	ice a v
8.	I drink two or more ounces of alcoholic beverages:				
	☐ Daily ☐ 5-6 times per week ☐ 3-4 times per week ☐ 1-2 times per week ☐	Less	s tha	an or	ice a v
9.	List your current health problems and any over-the-counter or prescription medications that you are now taking: Current health problem(s) Date of onset List all current medication(s)				
	Current health problem(s) Date of onset List all current medication(s)				
		n T	IV.		





