


**CMDS** | CLINICAL MASTERY OF  
THE DIGESTIVE SYSTEM

**Client Assessment and  
Education Strategies**



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**Medical Disclaimer:** The information in this presentation is not intended to replace a one-on-one relationship with a qualified health care professional and is not intended as medical advice. It is intended as a sharing of knowledge and information from the research and experience of Dr. Ritamarie Loscalzo, drritamarie.com, and the experts who have contributed. We encourage you to make your own health care decisions based upon your research and in partnership with a qualified health care professional.



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**Getting to Know Your New Client**

- ✓ **The initial contact**
- ✓ **Pre-consultation forms:** online or paper and pen forms completed, usually before initial consultation
- ✓ **Initial consultation:** interview questions
- ✓ **Journals** of their daily activities and diet
- ✓ **Review old labs** if any and order new ones if necessary



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### Full Functional Assessment

- ✓ **"Ninja" history taking** and interview skills
- ✓ **Questionnaires and surveys**, preferably scorable
- ✓ Questions include **all aspects of health**: diet, environment, habits, exposures, stresses, past
- ✓ **Client diary analysis** and session check-in forms
- ✓ Looking for **nutritional deficiency physical clues**
- ✓ Traditional **Eastern body diagnosis**
- ✓ **Blood chemistry** analysis
- ✓ **Functional lab tests**: stool, urine



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### Components of a Thorough History

- ✓ Demographics and General Information
- ✓ Health Goals
- ✓ History of Chief Complaint(s)
- ✓ Current Health and Exposures
- ✓ Medication and Supplement History
- ✓ Past Health History and Family Health
- ✓ Organ and Gland Scorecards
- ✓ Nutrient Evaluation Scorecards
- ✓ Journals and Tracking Forms
- ✓ "Ready and Willing" Assessment



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### Assessment Interpretation

Assessment / Desired Score	Score At Start Date:	Priority V High High, Med, Low	Protocols Started Date	Protocols Completed Date	Score After Protocols
Low stomach acid / <10					
Excess stomach acid / <10					
Pancreas/small intestine / <10					
Large intestine / <10					
Liver/gallbladder / <10					
Candida/dysbiosis / <40					
Leaky gut / 0					
SIBO					

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