

Client Assessment and Education Strategies



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.



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



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



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



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					



	Low Stomach Acid	Excess Stomach Acid	Small Intestine and Pancreas	Large Intestine	Liver / Gall Bladder	Candida/ Dysbiosis	Leaky Gut and Inflammatory Bowel Disease	FODMAP /Specific Carbohydrate Sensitivity (SCD)	SIBO
Gut Rejuvenator		Monitor – remove citrus or aCV if it aggravates							
Green Drinks							juices or cooked and blended greens if severe	Replace restricted greens with allowed	Replace restricted greens
Pre Meal Ritual, Chewing, Calm									
Remove Gut Hurting Foods		█					█		
Elimination diet – food sensitivities									
Add Gut healing foods							May need to restrict to cooked/ pureed	Modify to only include the allowed foods	FODMAP and SCD, consider elemental diet
HCL Challenge	█	NO			█		caution		
Bitters plus zinc		caution			█				
Enzymes	█	caution	█		█				
Gut Soothing Herbs - Mucilaginous		█					█	Some herbs may not be tolerated –Modified SCD chart	Some herbs may not be tolerated – Modified SCD chart
Antispasmodic Herbs				█					
Carminative Herbs									
Candida parasite cleanse							█		
Leaky Gut								█	
Liver/gall bladder cleanse									
Probiotics									Not in early stages
Prebiotics								Caution	Caution
Cholagogues	█	Caution- May Stimulate HCl			█				



Teaching Tools and Done-For-You Tools

- ✓ **GRAND** program on VLM
- ✓ **Food Allergies** on VLM
- ✓ Digestion and Assessment Scorecards: PDF and Doc formats
- ✓ Digestion Protocols: PDF and Doc formats
- ✓ Licensing/Use of GRAND materials after certification

