



INE | INSTITUTE OF
NUTRITIONAL
ENDOCRINOLOGY

History Taking: Introduction

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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.



Functional Assessment Includes

- ✓ **“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
- ✓ Functional **physical evaluation**
- ✓ Traditional **Eastern body diagnosis**
- ✓ Looking for **nutritional deficiency physical clues**
- ✓ **Blood chemistry** analysis
- ✓ **Functional lab tests** – saliva, urine, hair, stool



The Art of “Ninja” History Taking

- ✓ Why it's important
- ✓ What it takes to be thorough
- ✓ Functional assessment
- ✓ Root cause analysis
- ✓ Identify risk factors
- ✓ Early detection
- ✓ Prevention of disease and dysfunction
- ✓ Address signs and symptoms before they become pathology



4 Pillars of a Functional Assessment

- ✓ Historical data, scorecards
- ✓ Physical
 - Traditional PE: pathology
 - Functional testing:
reflex points, functional tests
- ✓ In-office/at-home testing
 - Lab
 - Functional: i.e., mineral tests, pH
- ✓ Labs: blood, urine, saliva, hair, stool



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



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

