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# 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](http://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

