



History Taking: Scorecards and Wrap-up

Transcript

The next piece of our ninja history taking is really looking deep into the different body systems. I developed a set of scorecards based on metabolic assessment questionnaires that are very common in functional medicine but I have taken it to another level. I have used a lot of the basic questions from those, added some of my own and some others that I have learned along the way, I have added some other questions from other systems of healing and then come up with a score for each organ and gland. Then I had a computer programmer to get a program so it works on our website and spits out a nice graph which gives people a visual example of how each of their body systems are doing.

Before we begin let's make sure that you are aware that any of the information I'm presenting here is not intended to replace a one-on-one relationship with a qualified healthcare professional. It's also not medical advice and when you are presenting to your clients you need to be really careful and make sure that they are aware that what you are presenting, and what I'm presenting here today, is intended as a sharing of my knowledge, information, clinical research and clinical experience over many years. I encourage you, and you should encourage your clients, to make their own healthcare decisions based upon your research and in partnership with a qualified healthcare professional. This is especially true for people who are on any medications. I just want to make sure that the things that we talk about in terms of nutrition are not going to interfere with the protocols.

Let's take a look at what we want to be looking at and why we want to be exploring this. We take a look at digestion including leaky gut and Candida. The **digestion section** is broken down into the upper G.I., both assessment for excess stomach acid and not enough stomach acid, the pancreas/small intestine for digestion enzyme capacity, the large intestine for excretion and elimination capacity, as well as the liver and gallbladder. The **cardiovascular system**. We look at how well the person is doing in terms of having a strong, healthy cardiovascular system.

Respiratory system. Their sinuses, their lungs. The **genitourinary systems**, which would be the kidneys and the bladder and also the male and female reproductive organs.



We look at **neurotransmitters**. How well is their brain functioning? How well are they making neurotransmitters? We look at four major neurotransmitters as well as general brain function. We look at **detoxification pathways** and we do this with a series of scorecards.

This is all on your section which is *Organ and Glands Scorecards Online Versions*. We are going to start with the body system. We have the same point scale for each of the questions. Zero is never or the least amount or no, never tried, never experienced, depending on the question. One would be mild but also occasional, sometimes the system is very occasional. Moderate means moderate in intensity or also frequency, so it could occur moderately frequently like a couple of times per week. Three is the worst. It is severe, absolutely not comfortable, frequent, intense, almost always present. Also yes in some of the questions. For yes and no, zero is no in three is yes.

We give them this key at the top. We start with digestion. The first set of questions is for your upper G.I. When we go through the digestive tract we will be looking at each of these kinds of things in detail. We are not going to take the time now to go through each of the questions and what they mean. We will be doing that when we do our *Module 5*, which is the *Digestion Module*. They are all questions about reflux, bloating, gas, and bad breath. You can have a look at those. We also want to differentiate between having excess stomach acid, which is more rare and not enough stomach acid. Here are some of the questions that differentiate. Then we go into the liver and gallbladder section. The liver and gallbladder questions are about the digestive functions of the liver/gallbladder. We have yet another questionnaire that goes into the detoxification.

There are a lot of questions here. Section 4 is all about the small intestine and the pancreas, so questions related to how well you are digesting your food and whether you have a leaky gut or not. That is a general screen. We have a whole separate *Leaky Gut Questionnaire*. Your large intestine. This is all about having parasites and how many bowel movements per day, how well the stool is formed. Then we have the next section, which is cardiovascular and there are questions about ankle swelling, circulation, etc. Kidney and bladder. We just have a few questions about their function there. Then with the immune system we have quite a number of questions about not only respiratory immune system related questions, but things like skin problems which can be related to the immune system as well. These are screens. They are not meant to be exhaustive, in-depth, everything that could possibly go wrong with these organ systems, but they are really good screens. We are going to show you an example of what the questionnaire looks like.



Now that you have seen the questions, let's take a look at what is generated on the other end. This is what I would get in my email inbox about each person. Of course there is their own personal data at the top which I deleted but I would get this report and it gives me at a glance, oh my goodness, we have to work very hard on this person's low stomach acid and her elimination because those are the two things that are the most compromised but her small intestine is not very much behind. Let's take a look at what these numbers mean and the different color-coding systems.

Basically, 0-10% is green. Everything is good, good to go. Just keep up sound nutrition and habits to maintain in this good balance range. 11-20%, they need a tune-up. They are already showing signs of stress on their organs. Good diet and lifestyle improvements ordinarily would shift these to normal without having to do some major interventions. At 21-35% things are definitely out of balance and need attention whether that's the diet and lifestyle changes, maybe some supplements and herbs to bring things into balance, and probably a good overhaul on their diet and lifestyle. 36-50%, they are very compromised. They are already feeling it obviously because they have a lot of symptoms that are showing up to give them that score. Their health is deteriorating. It needs to be stopped and turned around or they are heading for a big-time disaster. 51-100%, they may already be in a pretty compromised situation. It is very severe and it needs to be attended to right away. If you were to set something up like this you could get the email with all this information in it and at a glance see where this person is.

Yes you do want to work with the symptoms related to why they have this, but it is so much nicer to have this computerized printout with the nice color coding and it is especially good for them because they can see, 'oh my goodness I really have to listen to you. Whatever you tell me to do for this stomach, I want to get it fixed.' So it gives you a lot of leverage. In addition to the body system and organ, we broke out the hormone and gland assessment. We used to have them as one long questionnaire but people felt like they wanted to be able to break it out. They wanted to be able to leave the computer and come back later so we broke it up into two separate ones.

We have the *Hormone And Gland Assessment*, which is very similar. It is a similar layout and design to the other one. It is the same thing; they fill out their demographics a little bit. It has the same point scale. On this one we look at the adrenal glands. The general questions for the adrenal glands. Then we look at, are they having a tendency toward hypo function of the adrenal or cortisol elevation which would be hyper. Because the way the adrenals are, most people are in the state of both.



There are certain periods of time where they are in hyper-adrenal where they are pushing out a lot of cortisol and sometimes they are low. This gives us a general overall look and picture. It is not as accurate as doing an adrenal stress index but we're going to go into a lot more detail about the symptoms and how you can tell if somebody is in a state of adrenal distress and how you can test it more accurately. We will go into more details on that.

Same thing with the blood sugar dysregulation. You just look at it overall; do they have that sugar dysregulation. These are some of the questions, craving sweets, binging, sleeping in the afternoon, fatigue relieved by eating, shaking if meals are delayed, these are all general blood sugar dysregulation. Then we also try to, if we can, narrow it down to which they have more tendency towards which is the blood glucose fluctuation, like hyperglycemia or have more insulin resistance. Again they are all part of the same spectrum. We go through a lot more detail on this in the insulin resistant practitioner program because it is a whole thing that is devoted to that and we really get into the nitty-gritty, but some of the systems are similar between the two. Fatigue after meals and wanting sweets right after meals are really hallmark of insulin resistance because you are eating this food and it is not getting in. If you are really grumpy and irritable, if you miss meals and get the highs and the lows, this is also a sign of hyperinsulinemia, you're making too much insulin and your blood sugar goes plummeting down too quickly. Again they are all in the same range.

Then we have symptoms of thyroid, the low thyroid, the people who are overweight, dry skin, dry hair, chronic constipation, high cholesterol, or they are sluggish. These are all signs and symptoms. When we do the adrenals we will be differentiating between adrenal and thyroid because there are some symptoms that are very similar. We are going to teach you how to differentiate and how to get a clue whether it is an adrenal, thyroid, or both. Then there are systems for excess thyroid. Those would be palpitations, high heart rate, losing weight, huge appetite, eating like crazy, increased pulse and not being able to sleep. Some people will say, I would rather have excess thyroid because I want to be thin. People who do have excess thyroid say, no you don't want that because it's this state of constant anxiousness in the body that does not go away. Pituitary rules all of the hormones so we ask questions that might straddle the different hormone systems. That gives us a clue as to whether there may be something happening up above.

Then we have our male and female. So women leave blank but we have a prostrate and a male hormones evaluation, which we are going to look at when we do our assessment of these and we will go into a lot more detail. The women's section pre-and post, these are questions about the menses.



I ask post menopausal women just to answer based on how they did before menopause because that can tell us a lot about their balance, their B vitamins, their magnesium, a lot of questions like that. Lots of questions on the female issue.

Then there is the section for just postmenopausal women. Then same thing, they fill it in, they get the same scorecards like the organ one and they have scores for each of their hormones. We have four more forms we can take a quick look at. The brain and neurotransmitter assessment, the whole section about analyzing the brain so I am not going to take a lot of time to do this right now but I am just going to show you the kinds of questions that you can and should be asking, same scoring. You ask about mood, you ask about memory, you ask about anxiety, depression, and this is the general brain function but we try to narrow it down a little bit. These are questions that would specifically be an issue for serotonin but there is so much overlap between the neurotransmitters. Really this is just giving us a general clue as to which ones are most out of balance. If one is way more out of balance of the others then we might be looking at herbs and nutrients to support that particular neurotransmitter.

We look at dopamine. Dopamine tends to be people who are losing motivation and drive. We will talk more about that in the assessments of the neurologic system. GABA turns things down. It is an inhibitory neurotransmitter. People who have a lot of anxiety and racing thoughts have GABA problems. Then the last one we look at is acetylcholine. Acetylcholine is deficient in people who are very stressed. Acetylcholine is related to the parasympathetic nervous system; you lose memory, especially short-term because elevated cortisol levels will damage the hippocampus. We will look more at acetylcholine in relationship to adrenaline and cortisol when we do our *Adrenal* Modules.

We get the same sort of score as we did before, and we get some clues as to where some of the brain/neurotransmitter dysfunction might be,

There is a *Detoxification Assessment*. This is a questionnaire that was developed by one of my mentors, Jeffrey Bland, PhD. I went to a lot of his seminars. He is a brilliant researcher. He came up with this questionnaire. They did a lot of testing on it. The score that you get at the end of this questionnaire is very telling of the overall toxicity load and when you put people on detoxification programs these symptoms change quite rapidly. I have seen it. I have put a person on a green cleanse and had their score go from 189 down to 79 in the course of seven days. This particular questionnaire asks similar frequencies, a little bit different.



There are just a few questions, a few telling questions that have been identified to be indicative of toxicity in those areas, or toxicity in the body, that manifests in these different areas--digestion, ears, head, heart, emotions, joints and muscles, energy and activity, lungs, eyes, and mind. These are all questions--skin, mouth, throat--so it is all the different organ symptoms, and you get a score. Any score of 50 or above is major toxicity.

Then we have different ratings that you get when they get the email. Here is a copy of the email that gets sent after the person fills out the toxicity score. I would recommend that you go ahead and fill it out so that you can have it for your record. You can see at the top, we say you scored a 71 so now I know where I fell. So if it is 10 or less that means I am in the low toxicity category. My liver is doing great. 11 to 49 means I am in the mild to moderate toxicity. The liver is not able to keep up real well and I may be having symptoms. 50 to 100 is a high toxicity category. The liver is overloaded. Over 100 is extreme toxicity. You can read more about it. This was originally put together for the green cleanse and it still has that written in there rather than some generic stuff. I just ran everything through with as a one. I have a special shortcut to do that so it looks like everything is a one but I have 25% of every single set of questions so things are out of balance.

That's what you get. You can use this as your guidelines for when people fill out these sorts of questions. This question is available as a paper and pen test. I know that Metagenics has them in a brochure form. You can look online for this toxicity test, and you can actually have a paper pen format if that is what you prefer. Then you can score it based on the score sheet here.

Lots go back. After the *Detox Questionnaire* we have a *Candida And Parasite Questionnaire*. Again, this is a standard functional medicine questionnaire that I have put online. I just made an online version of it. There are three parts to this test. The first part is asking historic questions about antibiotic use, prednisone, and various other things. It also asks about your symptoms and relationship to molds, history of having specific conditions that are related to Candida overgrowth or oftentimes correlates, for example to jock itch. Some of these questions are not going to change. There is a maximum score of 210. You go through, you add up the questions. We get to the next section of the test which is about some of the major symptoms.

Each of these has a score. When you get finished you can see what the scores are and add them up. It is pretty easy to do. At the end of each section you just add them up. Again, you can find this in paper and form all over the web. Just look it up.



Candida detoxification score quiz. It is no problem, it is very standard. I did not change any questions at all. I just use the same questions because they are tried and true and they are used throughout functional medicine. Most practitioners know of this questionnaire and in fact use it. So at the end of this section you add up the numbers. After you get the number, by adding them up, you continue and go through the next section. Once you finish that you score it. You go to the next section.

You want to keep track of your totals so you write down your total from the first section. You write down the total from your second section. You write down your total from the third section and you write down your total of all three. Then you look at your evaluation, your numbers. Where do you fall? In women there are certain ranges, if your total is above 180 then you most certainly have candida overgrowth problem; if it is all the way down below 60, then most likely not. Men have a slightly different scoring. Then you continue and it shows you the results. You say yes, I want to send that. You send it in and you get the email with the results. You can go through this and again, you can look at it more carefully at what symptoms are going to hallmark having a candida problem. We will look more closely at the digestion part; but for now I want you to get the idea that this is a part of the full questionnaire.

The last one is *Leaky Gut*. It is a functional medicine questionnaire that a lot of practitioners use. You answer all of these questions. There is only one part. How often do you have constipation, diarrhea, mucus in your stool? It asked a lot about not only the gut symptoms but the far reaching symptoms of leaky gut because when you have leaky gut you can have fatigue, skin problems, depression, etc. You answer all of these questions and add up the score. If your score is zero, great, you are in good shape. Less than five, you have a few signs and symptoms but the likelihood of leaky gut being a major problem is low. Greater than five and less than 20 you are showing signs of leaky gut and it is probably resulting in a health challenge. Anything greater than 20, leaky gut is probably a significant factor.

These are great questionnaires that you can give people. You don't have to give them to everyone but you give it when it makes sense to give it. You give these questionnaires, too, whenever you want to have a score. When you want leverage with your clients, you want to be able to show them a score. To show them the effectiveness of what they are doing, you can show them how the scores change. I love to re-do these quizzes every couple or three months. If you are on a shorter program with someone you may do it at six weeks.

We are at the home stretch. We are going to look at the *Nutrition Scorecards*. They are very similar to these.



We have a general nutrition balance, a vitamin balance and a mineral balance. Again, this used to be one big questionnaire. People did not like to fill it all out at one time because it took a long time to fill it out. They would say, can't you break it up? So we broke it up. The general nutrient balance will test amino acids, fatty acids, and overall nutrients. The questions here, we have vitamins, this is again a scorecard, very similar to the organ and gland ones where you get a percentage of our score.

We are looking at different things that might show just general stuff that might show vitamin and mineral needs. The vitamin and mineral questionnaire hones in a little bit further to help you identify which vitamin and minerals are most out of balance. This is an invaluable tool and I will show you one report that comes back from this that is so valuable to be able to just, at a glance, see that their vitamin C is low, or their zinc is not 100%. There may be questions that are ambiguous that can indicate one thing rather than another, but it just gives you a general ballpark of where you need to spend most of your time helping them.

Then you have the vitamin and mineral general questions. We have the fat needs. Lots of stuff about that the essential acids, like dry skin, gooseflesh behind the arms; that is a clear sign. When we do the physical exam we'll go into that a lot more. Inflamed joints, red cuticles, eczema, inflammatory conditions in general; amino acids, things related to neurotransmitters and depression are usually common in sleep. Learning disabilities and mood swings can all be related to amino acids being low. Poor healing can also be related. Once these questions are answered you get a beautiful graph.

Your graph is going to look something like this where the vitamin and mineral needs are low. The essential fatty acids are OK, but this person looks like they need amino acids. When we look at the vitamin one we will see that it is really nice to be able to see just a long a list of vitamins and minerals, and have a sense of what foods we are going to need to give them to help them correct it.

Let's move on to the *Vitamin Balance Assessment*, we are going to look at look at a results score from that; and minerals, and then we will be done except for some journaling. Again, questions, we have them broken down into A, B, B1, B2, B3, all of the Bs. They are broken down into biotin, folic acid, vitamin B12. There are a lot of B vitamins, aren't there? Then vitamin C, vitamin D, vitamin E, and then vitamin K. They fill out the form, they get a report that looks like this. You can see that this person is really showing a strong need for vitamin A, the B vitamins in general, and biotin.



Then a moderate need for other B vitamins, the individual B vitamins it points out so overall she has a strong need for B vitamins then within B vitamins the ones she needs most are biotin, B2 which is riboflavin, and then B3 which is niacin. Pantothenic acid isn't far behind. So her B vitamins are pretty low with the exception of B6. I think she was taking B6 and B1 so that is why they were not as low. So you see what we get. We get a similar chart for the minerals when we do the mineral test. Here is the mineral test. We go through calcium, chromium, copper, iodine, iron, magnesium, manganese, phosphorus, potassium, zinc, and then get the total. When you submit this you get a report that looks something like this.

Here we have a mineral balance result. We can see as we glance at this right away that this person's chromium and iodine are low as well as manganese and also magnesium. When I see the chromium and iodine stand out like that I immediately think I am going to make sure that I look really carefully at this person for blood sugar imbalance because chromium is important for blood sugar imbalance, and also at the thyroid because iodine is very important for the thyroid. There may also be some healing going on, some connective tissue or wound because the manganese is low and that is used a lot when people are healing from an injury.

Let's finish up by looking at journals and tracking sheets and what I call the ready and willing assessment. It is really important to keep track before you speak to somebody, or in the early stages of an evaluation, by getting a diet diary. You can do the diet diary by either using an online form similar to what we showed you earlier and this one has not just the diet diary but the supplements and medications. This is the idea with the diet diary. You want them to keep track of all the foods they eat, the time they ate it, their emotional state, and what symptoms that may have happened before and after and how they were doing throughout the day. This helps you to keep a very detailed log so that you have a sense of how food is affecting them and they get to have a sense because you will be pointing it out to them.

Finally we have an online form for those who like online forms. I like them. A lot of people really love doing online form because it is quick and easy. There is no paper, no scanning, nothing, you just sit down and type it in. We ask them what are the three worst foods you ate this week. This is a weekly diet diary. We are not being general; 'what about this week?' As you are working with them it is going to get better and better. What are the healthiest foods that you ate this week? List all of the medications that you took. Dosage, timing, and I tell people if it is all the same as on your sheet then write that in but if there has been some exceptions like if you have missed doses or have taken extra doses then go ahead and write that in for me. Same thing with the supplements. If it is the same just write same as chart. I would have a copy of that. Then we go through each day.



I would give them an open space where they can list every day what foods they have eaten, what symptoms they may have, what times they have had it, and also how much and what times they had something to drink.

Finally if there are any other comments, observations, cravings, binges, anything else that they want to share with me for the course of the week, they can.

If they have been keeping a diet diary, say they have the word file that has it in it, they can upload that to me here so I can see it, or any other documents, actually, that they want to upload to me.

The very last thing is something called the *Ready And Willing Assessment*. They may have all good intentions and purposes, and tell you they want their problems solved but they may not realize what it might take. So you just want them to rate on a scale of five, very willing, down to one, not willing. How willing are they to modify their diet, take supplements, keep a record, modify their sleep and work schedule, practice relaxation techniques, exercise regularly, and have a periodic lab test to assess their progress? If they are not willing, you can make a choice that you are not willing to work with them or you can make the decisions that you are willing to work with them and you know that as you make small and steady changes with them they will be more and more motivated the more they see results. You ask them how confident they are in their ability to actually follow through. Do they have other people in their lives who can support them through this? Finally, how much ongoing support do you feel like you need from you as a practitioner? That will help you to design the appropriate program for them.

That is it for our evaluation. We have done a lot here. We have covered a lot. You've got a tremendous amount of information. You have information that has taken me decades to amass and to put together and I am giving it to you in one shot here. I hope that this has been helpful. I know that it has been a lot of information and it may feel overwhelming. If it does, that is okay. That is exactly what it generally will feel, overwhelming, when you do something like this. We have reached the end. You've got lots of resources. You've got a lot of forms. You've got things to pour through; you've got things to think about. I recommend that you go through the videos a few times.

Go through the forms. Decide which ones you want to use as is. Decide which ones you think might be a little over the top that you want to shorten and do that. Always have those forms for you handy at your desk in a stack so that when you are chatting with somebody you can make sure that you do not miss anything. Does this mean you have to do all of this stuff all at the same time right at the beginning? No. You can spread it out.



You will learn and come up with your own system as time goes on. In the meantime if you are ready, use mine. Use some of these forms as-is. Use the forms and ask the questions. Make up your own, and once you feel really confident with the materials, move on and you will get confident with the physical history exam; then you can review lab assessments.

Take your time going through this. Don't feel rushed. There is a lot of information here and it is just going to take you a couple of times through to really get it, if this is all new to you. So move on if you are ready to go, otherwise go back and review and we will see you on the next one. Bye now.