



## History Taking Guidelines

As a nutrition coach and/or functional medicine practitioner, it's important to do a very thorough history. Remember, you are looking for root causes, and it's important to investigate all aspects of your client's life.

Of course there will be the very easy and obvious cases that walk through your doors. And I hope you get many, because the tough cases take a lot of time and effort.

The history taking consists of several parts

1. **The initial contact:** Sometimes this is a brief chat over the phone when someone calls because their friend referred them, and you ask a few questions to determine if it's a good fit.
2. **Pre-consultation forms:** While it's possible to take a good history in person on the phone, the process of gathering all the information you need can be very time consuming. I prefer to get a lot of the details, especially historical details involving dates, before the initial consultation.
3. **Initial consultation:** Interview questions
4. **Journals** of their daily activities and diet

The information you'll be gathering falls into the categories you'll find on the next page. You won't need all of these categories for every person that comes through the door, but it's good to be familiar enough with each piece that you can easily include the appropriate parts as needed.

With experience, you'll recognize the need for specific types of information.

I prefer to keep all of the pieces as separate, shorter forms, sometimes collected over time. I like to gather enough to at least get the person started on basic nutritional protocols, and then I have the client complete the more detailed assessments over time. With practice you'll discover what works best for you.



## Components of a Thorough Client History:

- ☐ Demographics and General Information
- ☐ Health Goals
- ☐ History of Chief Complaints
- ☐ Review of Body Systems
- ☐ Medications
- ☐ Supplements
- ☐ Past Illness History
- ☐ Surgery
- ☐ Trauma
- ☐ Family History
- ☐ Nutrition and Lifestyle Questionnaire
- ☐ Stress Evaluation
- ☐ Environmental Influences Questionnaire
- ☐ Dental Evaluation
- ☐ Hormone Evaluation
  - ☐ Thyroid
  - ☐ Adrenal
  - ☐ Insulin
  - ☐ Pituitary
  - ☐ Sex Hormones
- ☐ Body Systems Evaluation Scorecards
  - ☐ Digestion (including leaky gut and candida)
  - ☐ Cardiovascular
  - ☐ Respiratory
  - ☐ Genitourinary
  - ☐ Neurotransmitters
  - ☐ Detoxification
- ☐ Nutrient Evaluations
  - ☐ Vitamins
  - ☐ Minerals
  - ☐ Amino Acids
  - ☐ Fatty Acids
- ☐ Patient Readiness Evaluation