

## Patient Intake Form

Welcome to Blum Center for Health! This is the first step on your path to wellness and we look forward to meeting with you in person.

We have created this comprehensive intake form for you to fill out in advance of coming to see us. We realize it might take some time for you to go through, but this will give you an opportunity to think and remember about your past medical history, about your current medical concerns and reasons for seeking our help. Having all this information on paper will be very helpful when you come in, and we will review this together during your medical or nutrition consultation. We have learned that it is often hard for our patients to remember everything when sitting in front of us!

See you soon,

**Susan S. Blum, MD, MPH**  
Medical Director

**Elizabeth Greig, MSN, FNP**  
Nurse Practitioner,  
Functional Medicine

**Mary Gocke, RD**  
Nutritionist,  
Functional Medicine

\* We ask that you please refrain from wearing perfume, cologne, or scented body lotions at the time of your visit since we have many patients with severe allergies. Thank you in advance for your consideration.

### SECTION 1: PATIENT INFORMATION

Name					Date			
Age		Date Of Birth		Social Security #			Gender	
Occupation								
Primary Address				Alternate Address				
Street				Street				
City		State	Zip	City		State	Zip	
Home Phone				Work Phone				
Cell Phone				Fax				
Email Address				Permission to leave a message on your answering machine? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Emergency Contact				Emergency Phone:				
Referred by: <input type="checkbox"/> Book <input type="checkbox"/> Website <input type="checkbox"/> Media <input type="checkbox"/> Friend or Family								
<input type="checkbox"/> Other _____								

## Patient Intake Form

### INSURANCE INFORMATION

Member Name

Self    Spouse    Parent

Name of Insurer

State

Plan #

### SECTION 2: MEDICAL HISTORY

What brings you to Blum Center For Health? \_\_\_\_\_

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If you had 3 wishes for our visit today, what would they be?

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When did you last feel well? \_\_\_\_\_

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## Patient Intake Form

### SYMPTOM REVIEW

Please check if you have had these symptoms in the past and/or in the recent 6 months (including now)

#### SKIN PROBLEMS:

NOW PAST

- Acne
- Athlete's foot
- Bumps back of upper arms
- Cellulite
- Dandruff
- Dark circles under eyes
- Ears get red
- Easy bruising
- Eczema
- Herpes – genital
- Cold sores
- Hives
- Jock itch
- Change in Moles
- Oily skin
- Psoriasis
- Rash
- Red face
- Sensitive to bites
- Sensitive to poison ivy/oak
- Shingles
- Skin cancer
- Skin itching
- Skin dryness
- Strong body odor

#### HEAD, EYES & EARS:

NOW PAST

- Distorted smell
- Distorted taste
- Bad Breath
- Ear fullness
- Ear pain
- Ear ringing
- Hearing prob
- Eye pain
- Vision
- Sinus
- Migraine
- Headache
- Noise sensitive
- Jaw pain

#### NAILS:

NOW PAST

- Bitten
- Brittle
- Curve up
- Fungus
- Peeling
- Ridges
- Thickened
- White spots/lines

#### CARDIOVASCULAR:

NOW PAST

- Chest pain
- Breathlessness
- Palpitations
- Pain in calves
- Swollen ankles
- Varicose veins

#### RESPIRATORY:

NOW PAST

- Bad breath
- Cough
- Hay fever
- Hoarseness
- Nasal stuffiness
- Nose bleeds
- Post nasal drip
- Out of breath
  - At rest
  - With exercise
- Sinus fullness
- Sinus infection
- Snoring
- Sore throat
- Wheezing
- Winter stuffiness

## Patient Intake Form

### DIGESTION:

NOW PAST

- Bloating after eating
- Blood in stools
- Burping
- Constipation
- Anal itching
- Trouble chewing
- Diarrhea
- Difficulty swallowing
- Dry mouth
- Passing gas
- Fissures
- Foods "repeat"
- Heartburn (reflux)
- Hemorrhoids
- Intolerance to:
  - Lactose
  - All milk products
  - Gluten
  - Corn
  - Eggs
  - Fatty foods
  - Other \_\_\_\_\_
- Yellow eyes/skin
- Abdominal pain
- Mucus in stools
- Nausea
- Strong stool odor
- Undigested food in stools
- Vomiting

### MUSCLE/BONE:

NOW PAST

- Muscle twitching
- Muscle pain
- Joint pain
- Joint stiffness
- Tendonitis
- Back pain

### MOOD/NERVES:

NOW PAST

- Difficulty:
  - Concentrating
  - With balance
  - With judgment
  - With memory
- Dizziness (spinning)
- Light headedness
- Fainting
- Numbness
- Anxiety
- Fearfulness
- Depression
- Suicidal thoughts
- Other Phobias
- Panic attacks
- Paranoia
- Hallucinations
- Seizures
- Tingling
- Tremor

### ENDOCRINE/IMMUNE

NOW PAST

- Cold hands/ feet
- Cold or heat intolerance
- Fatigue
- Weight gain
- Get sick a lot
- Swollen lymph nodes
- Hair loss

### URINARY:

NOW PAST

- Hesitancy
- Frequent UTI
- Pain/burning
- Urgency
- Leaking

### MALE REPRODUCTIVE:

NOW PAST

- Discharge from penis
- Ejaculation problem
- Genital pain
- Impotence
- Lumps in testicles
- Poor libido (sex drive)

## Patient Intake Form

### FEMALE REPRODUCTIVE:

NOW PAST

- Breast cysts
- Breast tenderness
- Ovarian cyst
- Poor libido (sex drive)
- Pelvic pain
- Infertility
- Vaginal discharge
- Vaginal itch
- Vaginal pain

### PREMENSTRUAL:

NOW PAST

- Bloating
- Breast tenderness
- Food cravings
- Sleep change
- Fatigue
- Irritability

### MENSTRUAL:

NOW PAST

- Cramps
- Heavy periods
- Irregular periods

No periods

Spotting

### MENOPAUSE:

NOW PAST

- Hot flashes
- Mood Swings
- Concentration
- Memory
- Vaginal dryness
- Painful sex
- Decreased libido
- Weight gain
- Frequent urination

## PAST AND CURRENT MEDICAL DIAGNOSES

Check box if you have been diagnosed with any of the conditions below, either presently or in the past (prior to 6 months)

### GASTROINTESTINAL:

NOW PAST

- Irritable Bowel Syndrome
- Inflammatory Bowel Disease
- Crohn's disease
- Ulcerative Colitis
- Gastritis or Peptic Ulcer Disease
- GERD (reflux)
- Celiac Disease
- Other \_\_\_\_\_

### CARDIOVASCULAR:

NOW PAST

- Heart Attack
- Stroke
- Elevated Cholesterol
- Arrhythmia (irregular heart rate)
- High blood pressure
- Rheumatic Fever
- Other \_\_\_\_\_

### METABOLIC/ENDOCRINE:

NOW PAST

- Insulin Resistance
- Hypothyroidism (low thyroid)
- Hyperthyroidism (overactive)
- Polycystic Ovarian Syndrome
- Bulimia
- Anorexia
- Binge Eating Disorder
- Eating Disorder (non-specific)
- Other \_\_\_\_\_

### METABOLIC/ENDOCRINE:

NOW PAST

- Type 1 Diabetes
- Type 2 Diabetes
- Hypoglycemia
- Metabolic Syndrome

## Patient Intake Form

### CANCER:

NOW PAST

- Lung Cancer
- Breast Cancer
- Colon Cancer
- Ovarian Cancer
- Prostate Cancer
- Skin Cancer
- Other \_\_\_\_\_

### GENITAL AND URINARY:

NOW PAST

- Kidney Stones
- Gout
- Interstitial Cystitis
- Frequent Urinary Tract Infections
- Frequent Yeast Infections
- Erectile Dysfunction
- or Sexual Dysfunction
- Other \_\_\_\_\_

### MUSCULOSKELETAL OR PAIN

NOW PAST

- Osteoarthritis
- Fibromyalgia
- Chronic Pain
- Other \_\_\_\_\_

### INFLAMMATORY/ AUTOIMMUNE:

NOW PAST

- Chronic Fatigue Syndrome
- Autoimmune Thyroid
- Hashimoto or Graves
- Rheumatoid Arthritis
- Lupus SLE
- Immune Deficiency Disease
- Severe Infectious Disease
- Food Allergies
- Environmental Allergies
- Multiple Chemical Sensitivities
- Latex Allergy
- Mono or Epstein Barr
- Other Autoimmune

### RESPIRATORY DISEASES:

NOW PAST

- Asthma
- Chronic Sinusitis
- Bronchitis
- Emphysema
- Pneumonia
- Tuberculosis
- Sleep Apnea
- Other \_\_\_\_\_

### SKIN DISEASES:

NOW PAST

- Eczema
- Psoriasis
- Acne
- Melanoma
- Skin Cancer
- Other \_\_\_\_\_

### NEUROLOGIC/MOOD:

NOW PAST

- Depression
- Anxiety
- Bipolar Disorder
- Schizophrenia
- Headaches
- Migraines
- ADD/ADHD
- Autism
- Mild Cognitive Impairment
- Parkinson's Disease
- Multiple Sclerosis
- Seizures
- Other Neurological Diagnosis

## Patient Intake Form

### MEDICATION AND ALLERGIES

CURRENT MEDICATIONS – USE A SEPARATE SHEET IF NECESSARY

MEDICATION	REASON FOR USE

### ALLERGY INFORMATION

MEDICATION/SUPPLEMENT/FOOD	REACTION

- Prolonged or regular use of NSAIDS (Advil, Aleve, etc.), Motrin, Aspirin, Tylenol
- Prolonged use of acid Blocking Drugs (Tagamet, Zantac, Prilosec, etc.)
- Use of steroids (Prednisone, inhalers) in the past
- Prolonged use of Antibiotics
- Prolonged use of Antidepressants

**Patient Intake Form**

**PAST MEDICAL HISTORY**

**YOUR BIRTH HISTORY:**

- Term
- Premature

**Pregnancy or Birth Complications:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**YOUR CHILDHOOD HISTORY**

*Check box if yes:*

- Lots of candy or sugar as a child
  - Ear infections
  - Recurrent strep throat
  - Lots of antibiotics
  - Stomach aches
  - Mono
  - Other childhood illness
- \_\_\_\_\_

**DENTAL HISTORY**

- Lots of cavities as a child
- Silver Mercury Fillings
- How many? \_\_\_\_\_
- Gold Fillings
- Root Canals
- Implants
- Tooth Pain
- Bleeding Gums
- Gingivitis
- Floss regularly

**INJURIES:**

- Back injury \_\_\_\_\_
- Neck injury \_\_\_\_\_
- Head injury \_\_\_\_\_
- Broken bones \_\_\_\_\_
- Other injury \_\_\_\_\_

**FOR WOMEN:**

**OBSTETRIC HISTORY**

*Check box if yes and provide number of:*

- Pregnancies: \_\_\_\_\_
- Caesarean: \_\_\_\_\_
- Vaginal deliveries: \_\_\_\_\_
- Miscarriage: \_\_\_\_\_
- Abortion: \_\_\_\_\_
- Living Children: \_\_\_\_\_
- Post Partum Depression
- Toxemia
- Gestational Diabetes
- Baby over 8 pounds
- Breast Feeding
- for how long? \_\_\_\_\_

**MENSTRUAL HISTORY**

- Age at first period: \_\_\_\_\_
- Menses Frequency: \_\_\_\_\_
- Length: \_\_\_\_\_
- Yes No
- Pain
- Clotting

- Has your period ever skipped? \_\_\_\_\_
- For how long? \_\_\_\_\_
- Last Menstrual Period: \_\_\_\_\_
- Use contraception
- Birth Control Pills
- Currently. # Years? \_\_\_\_\_
- Past. When? \_\_\_\_\_
- Patch
- Nuva Ring
- How long? \_\_\_\_\_
- Condom
- Diaphragm
- IUD
- Partner vasectomy

**MENOPAUSE HISTORY**

- Menopause, Age of last period \_\_\_\_\_
- Hormone replacement therapy
- Currently? # Years? \_\_\_\_\_
- Past: When? \_\_\_\_\_



## Patient Intake Form

### PAST SURGICAL HISTORY AND HOSPITALIZATIONS

DATE	CONDITION / REASON

### PREVENTATIVE/DIAGNOSTIC TESTING

*Check box if yes and provide date*

- Full Physical Exam \_\_\_\_\_
- Bone Density \_\_\_\_\_
- Colonoscopy \_\_\_\_\_
- Cardiac Stress Test \_\_\_\_\_
- EBT Heart Scan \_\_\_\_\_
- EKG \_\_\_\_\_
- Hemocult Test-stool test for blood \_\_\_\_\_
- MRI \_\_\_\_\_
- CT Scan \_\_\_\_\_
- Upper Endoscopy \_\_\_\_\_
- Upper GI Series \_\_\_\_\_
- Ultrasound \_\_\_\_\_

#### MEN'S PREVENTIVE TESTING

*Check box if yes and provide the date*

- Last PSA \_\_\_\_\_  
 PSA Level:  0-2  2-4  4-10  > 10
- Last Prostate exam (rectal) \_\_\_\_\_  
 Results \_\_\_\_\_

#### WOMEN'S PREVENTIVE TESTING

*Check box if yes and provide the date*

- Last Mammogram: \_\_\_\_\_
- Need a Biopsy? Date \_\_\_\_\_
- PAP test date \_\_\_\_\_  
 Normal  Abnormal

## Patient Intake Form

### ENVIRONMENTAL OR OTHER EXPOSURES AND DETOX ASSESSMENT

#### ADVERSE REACTION TO:

- Caffeine:
  - Irritable
  - Wired
  - Aches & Pains
- Monosodium glutamate (MSG)
- Aspartame (NutraSweet)
- Bananas
- Garlic
- Onion
- Cheese
- Citrus foods
- Chocolate
- Alcohol
- Red Wine
- Sulfite containing foods  
(wine, dried fruit, salad bars)
- Preservatives  
(ex. sodium benzoate)
- Other \_\_\_\_\_

#### YOU ARE EFFECTED BY:

- Cigarette Smoke
- Perfumes/Colognes
- Auto Exhaust Fumes
- Other: \_\_\_\_\_

#### IN YOUR WORK OR HOME ENVIRONMENT, ARE YOU EXPOSED TO:

- Chemicals
- Electromagnetic Radiation
- Mold

#### HISTORY OF:

- Jaundice (turning yellow)
- Gilbert's syndrome or a liver disorder.
- Explain \_\_\_\_\_

#### EXPOSURE TO HARMFUL CHEMICALS SUCH AS:

- Herbicides
- Insecticides (frequent visits of exterminator)
- Pesticides
- Organic Solvents
- Heavy Metals
- Other \_\_\_\_\_
- Chemical Name, Date, Length of Exposure

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- Dry clean your clothes frequently
  - Lived or worked in a damp or moldy environment or had other mold exposures
  - Do you have any pets or farm animals
- 
- Work with oil based paint as artist or painter
  - History of drinking problem (see Lifestyle section for detailed questions)

## Patient Intake Form

### SOCIAL AND PERSONAL HISTORY

#### RELATIONSHIPS

Single  Married  Divorced  Gay/Lesbian  Long Term Partnership

List Children:

CHILD'S NAME	AGE	GENDER

Who is living in Household? Number \_\_\_\_\_

Names \_\_\_\_\_

Their Employment/Occupation: \_\_\_\_\_

Where do you find emotional support? Check all that apply:

Spouse  Family  Friends  Religious/Spiritual  Pets  Other: \_\_\_\_\_

### LIFESTYLE AND SELF-CARE

#### SMOKING

Currently Smoking

How many years? \_\_\_\_\_

Packs per day: \_\_\_\_\_

Attempts to quit: \_\_\_\_\_

\_\_\_\_\_

Previous Smoking:

How many years? \_\_\_\_\_

Packs per day? \_\_\_\_\_

2nd Hand smoke exposure

\_\_\_\_\_

## Patient Intake Form

### ALCOHOL INTAKE:

- How many drinks currently per week?  
*1 drink = 5 ounces wine, 12 oz beer, 1.5 ounces spirits*
- None    1-3    4-6    7-10    > 10

### PREVIOUS ALCOHOL INTAKE:

- Mild    Moderate    High    None
- Been told you should cut down your alcohol intake
- Feel guilty about your alcohol consumption
- Have been unable to remember what you did during a drinking episode
- Get into arguments or physical fights when you have been drinking
- Been arrested or hospitalized because of drinking
- Thought about getting help to control or stop your drinking

### OTHER SUBSTANCES

- Caffeine intake:  
Cups/day:
- Coffee    1    2-4    > 4 a day
- Tea    1    2-4    > 4 a day

### CAFFEINATED OR DIET SODAS INTAKE:

- 12-oz can/bottle/day    1    2-4    > 4 a day
- List favorite type: Ex. Diet Coke, Pepsi:  
\_\_\_\_\_
- Recreational drugs  
Type \_\_\_\_\_

## EXERCISE, STRESS, AND SLEEP

### EXERCISE - Current Exercise Program

ACTIVITY	TYPE	HOW OFTEN EACH WEEK	HOW LONG
Stretching			
Cardio / Aerobics			
Strength			
Other (Yoga, Pilates, etc.)			
Sports or Leisure Activity			

Rate your level of motivation for including exercise in your life?    Low    Medium    High

List problems that limit activity: \_\_\_\_\_

Do you feel unusually fatigued after exercise?    Yes    No

If yes, please describe: \_\_\_\_\_

Do you usually sweat when exercising?    Yes    No

## Patient Intake Form

### STRESS/COPING

Check all that apply

- I have been in counseling in the past
- I am currently in therapy. Describe: \_\_\_\_\_
- I have excessive amount of stress.
- I have trouble handling the stress in my life
- Daily Stressors: Rate on scale of 1-10 (10 is the worst)

Work \_\_\_\_\_ Family \_\_\_\_\_ Social \_\_\_\_\_ Finances \_\_\_\_\_ Health \_\_\_\_\_ Other \_\_\_\_\_

- I practice meditation or a relaxation technique. How often? \_\_\_\_\_

Check all that apply:

- Yoga  Meditation  Imagery  Breathing  Tai Chi  Prayer  Other: \_\_\_\_\_

### SLEEP

Average number of hours you sleep per night:  >10  8-10  6-8  < 6

What time do you go to sleep? \_\_\_\_\_ Wake up? \_\_\_\_\_

- Trouble falling asleep
- Still feel tired in the morning
- Wake up during the night and can't fall back to sleep
- Snoring is an issue. You or your partner? \_\_\_\_\_
- Rely on sleeping pills

### NUTRITION AND DIET

#### NUTRITION HISTORY

Have you ever had a nutrition consultation?  Yes  No

Have you made any changes in your eating habits because of your health?  Yes  No

Describe \_\_\_\_\_

Do you currently follow a special diet or nutritional program?  Yes  No

CHECK ALL THAT APPLY:

- Low Fat  Low Carbohydrate  High Protein  Low Sodium  Diabetic  No Dairy  No Wheat
- Gluten Restricted  Vegetarian  Vegan
- Specific Program for Weight Loss/Maintenance Type: \_\_\_\_\_
- Other \_\_\_\_\_

## Patient Intake Form

### NUTRITION AND DIET

How often do you weigh yourself?  Daily  Weekly  Monthly  Rarely  Never

Do you avoid any particular foods?  Yes  No

If yes, types and reason \_\_\_\_\_

If you could only eat a few foods a week, what would they be? \_\_\_\_\_

Do you grocery shop?  Yes  No If no, who does the shopping? \_\_\_\_\_

Do you read food labels?  Yes  No \_\_\_\_\_

Do you cook?  Yes  No If no, who does the cooking? \_\_\_\_\_

How many meals do you eat out per week?  0-1  1-3  3-5  >5 meals per week

Check all the factors that apply to your current lifestyle and eating habits:

- |   |   |
|---|---|
| <input type="checkbox"/> Fast eater   | <input type="checkbox"/> Significant other or family members have special dietary needs or food preferences |
| <input type="checkbox"/> Erratic eating pattern                                       | <input type="checkbox"/> Love to eat  |
| <input type="checkbox"/> Eat too much   | <input type="checkbox"/> Eat because I have to  |
| <input type="checkbox"/> Late night eating  | <input type="checkbox"/> Have a negative relationship to food   |
| <input type="checkbox"/> Dislike healthy food   | <input type="checkbox"/> Struggle with eating issues  |
| <input type="checkbox"/> Time constraints   | <input type="checkbox"/> Emotional eater (eat when sad, lonely, depressed, bored)                           |
| <input type="checkbox"/> Eat more than _____% meals away from home                    | <input type="checkbox"/> Eat too much under stress  |
| <input type="checkbox"/> Travel frequently  | <input type="checkbox"/> Eat too little under stress  |
| <input type="checkbox"/> Non-availability of healthy foods                            | <input type="checkbox"/> Don't care to cook   |
| <input type="checkbox"/> Do not plan meals or menus                                   | <input type="checkbox"/> Eating in the middle of the night  |
| <input type="checkbox"/> Reliance on convenience items                                | <input type="checkbox"/> Confused about nutrition advice  |
| <input type="checkbox"/> Poor snack choices   |   |
| <input type="checkbox"/> Significant other or family members don't like healthy foods |   |

## Patient Intake Form

THE MOST IMPORTANT THING I SHOULD CHANGE ABOUT MY DIET TO IMPROVE MY HEALTH IS:

- Height (feet/inches) \_\_\_\_\_
  Current Weight \_\_\_\_\_  
 Usual Weight Range +/- 5 lbs \_\_\_\_\_
  Desired Weight Range +/- 5 lbs \_\_\_\_\_  
 Highest adult weight \_\_\_\_\_
  Lowest adult weight \_\_\_\_\_  
 Weight Fluctuations ( > 10 lbs.)  Yes  No
  Body Fat % \_\_\_\_\_

### NUTRITIONAL SUPPLEMENTS (VITAMINS, HERBS, HOMEOPATHY)

SUPPLEMENT/BRAND	REASON FOR USE

### READINESS TO CHANGE

RATE ON A SCALE OF: 5 (VERY WILLING) TO 1 (NOT WILLING).

In order to improve your health, how willing are you to:

Significantly modify your diet:

5  4  3  2  1

Take several nutritional supplements each day

5  4  3  2  1

Keep a record of everything you eat each day

5  4  3  2  1

Modify your lifestyle (e.g., work demands, sleep habits)

5  4  3  2  1

Practice a relaxation technique

5  4  3  2  1

Engage in regular exercise

5  4  3  2  1

Comments \_\_\_\_\_

How confident are you of your ability to organize and follow through on the above health related activities?

5  4  3  2  1

At the present time, how supportive do you think the people in your household will be to your implementing the above changes? 5  4  3  2  1

Comments \_\_\_\_\_

### **3 DAY FOOD INTAKE DIARY INSTRUCTIONS:**

It is important to keep an accurate record of your food and beverage intake as a part of your treatment plan. Please complete this Food Intake Diary for 3 consecutive days including one weekend day.

- List all foods and drinks, including the amount of each.
- Describe the food or beverage as accurately as possible e.g., milk - what kind? (whole, 2%, nonfat); toast - (whole wheat, white, buttered); chicken - (fried, baked, breaded), coffee - (decaffeinated with sugar and 1/2 & 1/2).
- Make note as to whether the food was fresh, frozen, canned, raw, cooked, baked, fried, etc.
- Be sure to include condiments (mustard, mayonnaise, relish, pickles, etc.).
- Record water intake.
- Record any symptoms that you felt throughout the day (fatigue, anxious, gas, bloating, nausea).
- Record the amount of each food or beverage consumed using standard measurements such as 8 ounces, 1/2 cup, 1 teaspoon, etc.
- Please note all bowel movements and their consistency (regular, loose, firm, etc.)
- Record any exercise you do each day, including the type of activity and its duration.

#### **DAY 1**

TIME                      FOOD/BEVERAGE                      AMOUNT

TIME	FOOD/BEVERAGE	AMOUNT

Bowel Movements (at what time of the day, #, form, color):

Exercise (time spent, type of exercise):

Symptoms (at what time of the day, describe symptom):

Other comments:



**DAY 2**

TIME	FOOD/BEVERAGE AMOUNT	COMMENT

Bowel Movements (#, form, color):

Exercise: \_\_\_\_\_

Symptoms: \_\_\_\_\_

Other comments: \_\_\_\_\_

**DAY 3**

TIME	FOOD/BEVERAGE AMOUNT	COMMENT

Bowel Movements (#, form, color):

Exercise: \_\_\_\_\_

Symptoms: \_\_\_\_\_

Other comments: \_\_\_\_\_