

**2019 Intake Form  
Adults (16+)**



Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Gender: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Mobile/Work: \_\_\_\_\_

Email: \_\_\_\_\_

Marital Status: \_\_\_\_\_ Spouse/Partner's Name: \_\_\_\_\_

Emergency Contact: \_\_\_\_\_ Phone Number: \_\_\_\_\_

How did you hear about Dr. Jones? \_\_\_\_\_

Describe your general state of health:                  Excellent      Good      Fair      Poor

Please list all of your health concerns and goals for treatment:

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If not included in the above list, please tell me about any current or past medical conditions, serious illnesses, injuries, traumas or hospitalizations with approximate dates:

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## Lifestyle

Circle the amount of stress you're dealing with: Minimal Moderate Significant Unbearable

What are your main stressors? \_\_\_\_\_

How do you cope with stress? \_\_\_\_\_

Do you have an emotionally supportive partner, friends or family members? YES NO

Have you ever received counselling or psychotherapy? YES NO

Rate your energy level (0-10 with 10 being excellent): 0 1 2 3 4 5 6 7 8 9 10

Do you have difficulty sleeping? YES NO Do you wake rested? YES NO

For how many hours do you sleep? \_\_\_\_\_ Do you work shift work? YES NO

Occupation: \_\_\_\_\_

Do you enjoy it? \_\_\_\_\_ When/where was your last vacation? \_\_\_\_\_

Hobbies and interests: \_\_\_\_\_

Who do you live with? \_\_\_\_\_

Do you have children? YES NO How old are they? \_\_\_\_\_

Do you have any pets? \_\_\_\_\_

Describe your physical activity/exercise habits (what and how often): \_\_\_\_\_

\_\_\_\_\_

Are you happy with your level of physical fitness? YES NO

If NO please explain where you see room for improvement: \_\_\_\_\_

How tall are you? \_\_\_\_\_ What is your approximate weight? \_\_\_\_\_

Describe what you eat in a typical day:

Meal	Time of day	What and how much
Breakfast		
Snack		
Lunch		
Snack		
Dinner		
Dessert/night time eating?		

Describe your use of the following substances:

	What and how much?	How often?
Caffeine		
Soft drinks		
Artificial sweeteners/"Diet" products		
Candy/Sweets/Sugar		
Alcohol		
Tobacco		
Cannabis		
Other recreational drugs		
Pain killers		
Antacids		
Laxatives		

**Review of Body Systems - please circle all that apply:**

**General:**

unexplained weight loss  
 unexplained weight gain  
 change in appetite  
 fatigue  
 fever or chills  
 night sweats  
 trouble sleeping

**Skin:**

rashes  
 itching  
 burning  
 dryness  
 hair or nail changes  
 mole changes

**Head & neck:**

head injury  
 headache  
 migraines  
 neck pain/stiffness  
 lumps/masses  
 thyroid problems

**Eyes:**

visual changes  
 eye pain  
 redness  
 double vision  
 blurry vision  
 flashing lights  
 cataracts  
 glaucoma

**Ears, nose, throat, mouth:**

hearing loss  
 ringing in ears  
 earache  
 vertigo  
 sinus congestion  
 sinus pain  
 nasal discharge  
 nosebleeds  
 hay fever  
 frequent sore throat  
 hoarseness  
 sore tongue  
 dry mouth

bad breath

thrush  
 non-healing sores  
 dental infections  
 bleeding gums  
 cold sores

**Cardiovascular:**

chest pain  
 tightness in chest  
 heart palpitations  
 dizziness  
 fainting spells  
 shortness of breath with activity and/or waking you up  
 difficulty breathing if lying down  
 ankle swelling  
 leg cramping  
 calf pain with walking

**Immunologic:**

hives  
 allergies  
 infections

**Hematological:**

easy bruising/bleeding  
 anemia  
 swollen glands

**Endocrine:**

hair loss  
 heat intolerance  
 cold intolerance  
 excessive sweating  
 excessive thirst  
 change in appetite

**Respiratory:**

dry cough  
 wet cough  
 productive cough  
 coughing up blood  
 shortness of breath  
 wheezing  
 painful breathing

**Gastrointestinal:**

difficult/painful swallowing  
 heartburn/reflux

nausea/vomiting	<b>Females:</b>	<b>Males:</b>	back pain
changes in bowel habits	sexual orientation: _____	sexual orientation: _____	joint pain
# bowel movements per day:_____	age of first period:_____	erectile dysfunction	joint stiffness
constipation	irregular periods	premature ejaculation	joint swelling
diarrhea	painful periods	penile discharge	joint redness
yellow eyes/skin	heavy bleeding	pain with sex	<b>Neurological:</b>
abdominal pain	PMS	loss of sex drive	dizziness
bloating/gas	fertility concerns	hernia	fainting
black/bloody stool	# pregnancies:_____	prostate issues	seizures
rectal bleeding	# childbirths:_____	masses	weakness
hemorrhoids	currently pregnant	sores	numbness
incontinence	breastfeeding	STI(s)	tingling
<b>Urinary:</b>	menopause	<b>Breasts:</b>	tremor
pain	hot flashes	breast lumps/masses	<b>Psychiatric:</b>
burning	vaginal dryness	nipple discharge	mood swings
frequency	pain with sex	breast pain	memory loss
urgency	loss of sex drive	dimples/skin changes	nervousness
leaking	abnormal PAP(s)	<b>Musculoskeletal:</b>	anxiety
incontinence	vaginal discharge	physical trauma	worry
blood in urine	vaginal itching	muscle pain/stiffness	depression
dribbling	Candida or BV	cramping	trauma/grief
decreased flow	masses/sores	restless legs	thought of self-harm
incomplete voiding	STIs		thoughts of suicide
bladder infections			eating disorder
			substance abuse

## What To Expect

Our work together begins with me listening attentively and with compassion to your story - usually over a cup of tea. This will feel different from interactions you've had with other doctors. I take the time to perform a thoughtful, thorough assessment of *all* your health concerns in the context of your lifestyle, diet and eating habits, environment, genetics and mental/emotional factors.

My diagnostic workup includes conventional blood tests as well as more sophisticated, functional medicine tests used to identify underlying problems related to your digestion, microbiome, hormones, immune system and environmental exposures. By taking the time to ask the right questions, perform the right tests and *really think about you*, I gain the necessary insight to create your personalized care plan.

Treatment is often initiated during your initial visit. When dependent upon the results of laboratory testing, treatment options will be discussed and implemented in your second visit after I review and explain your results.

I will recommend treatment options that are integrative, evidence based, generally safe and well tolerated. I will inform you of both the anticipated benefits as well as any known risks such as aggravation of pre-existing symptoms, known side effects and the potential for drug interactions. I will also advise you of any associated costs and alternative courses of action so that you feel confident in making an informed decision about your care every step of the way.

It is important that you return for occasional progress visits so I may effectively monitor your response to treatment, make necessary adjustments to your care plan and support you in maintaining your results.

## Privacy Policy

- 1) All personal and medical information is kept strictly confidential and will not be released to anyone without your written consent. You may request a copy of your records in writing at any time for an administrative fee of \$0.25 per page. Please allow 5-10 business days for such requests to be met.
- 2) Lab results will only be released once we have reviewed them together. After that time I am happy to share copies with you and members of your health team and there is no charge for this.
- 3) To ensure your privacy and the effective delivery of care, discussion about your health concerns and treatment must take place during visits. If something arises between scheduled visits please contact my office to schedule a visit so I may properly attend to your concern.
- 4) My office may contact you from time to time for the purpose of scheduling progress visits. Please inform us of any changes to your contact information and how you prefer to be contacted.

## Financial Policy

- 1) **Payment:** Payment for visits is due in full at the end of each visit. You will be presented with an itemized invoice for your visit fee and any lab work to be performed. You can pay by debit, credit card or cash.
- 2) **Insurance:** I do not direct bill insurance companies at the present time; however, I will provide you with itemized official receipts which you may easily submit to your insurance provider. Please consult

your policy to learn about your coverage. If you do not have coverage you may instead claim my fees as a medical expense deduction on your income tax return.

3) **Visit lengths:** Aside from your *Initial Visit* (90 or 120 minutes) and *Second Visit* (usually 60 minutes) your subsequent *Progress Visits* vary in length depending on the complexity of your health concerns, what you wish to accomplish and how recently we last met. If I haven't seen you in 3 months I'll generally ask you to book 60 minutes. If visits end early I will automatically reduce the fee. Likewise if your visit runs significantly longer than what was booked, as may be possible when my schedule permits, I will automatically increase the fee.

4) **Visit fees:**

2019 Fees for Adults		
Visit type	Duration	Fee
Initial Visit (Standard)	90 min	\$225
Initial Visit (Extended)	120 min	\$300
Second visit	60 min	\$150
Progress visits (in office or by phone)	30 min	\$90
	45 min	\$120
	60 min	\$150
	75 min	\$188
	90 min	\$225

5) **Cancellations:** A significant amount of resources are allocated to your visits and the high level of care I maintain for my patients. Missed visits and last minute cancellations greatly impact my ability to sustain high overhead costs and earn a

living. Please provide me with at least 24 hours notice if you need to cancel or reschedule to avoid being billed for the cost of the scheduled visit. While you must attend your initial visit in person, subsequent visits may be arranged by phone if you cannot make it to our office.

6) **Dispensary:** For your convenience you may purchase natural health products from my office as long as you remain actively under my care. Please don't share or buy for other people; what is safe and effective for you may be harmful to someone else. Only unopened product may be returned for credit within 30 days of purchase.

### Acknowledgement

By signing below you acknowledge that you have read and understand what to expect, including my Privacy Policy and Financial Policy outlined above. You agree to inform me of all health conditions and symptoms you're experiencing as well as prescription and over the counter drugs and natural health products you're taking. You agree to notify me if your condition, medication or natural health product use changes while under my care. You provide informed consent to receiving naturopathic care which you may withdraw at any time.

\_\_\_\_\_

Name

\_\_\_\_\_

Signature

\_\_\_\_\_

Date