Tina Malonis
HEALTH & LIFESTYLE COACHING

Client Intake Form

Thank you for taking the time to fill out this form and share with me details about your health, goals and medical history. Feel free to save this pdf to your computer and type in your answers at your convenience. On questions that may need explaining, where you type your responses will expand to accommodate your text, so you will have as much space as you need.

Client Information

Name _____

Address _____

City _____

State _____ Zip Code _____

Phone (day) _____

Phone (cell) _____

Phone (night) _____

Email _____

Referred by _____

Statistics

Age _____

Birth Date _____

Gender _____

Height _____

Blood Type _____

Current Weight _____

Ideal Weight _____

Weight One Year Ago _____

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Birth Weight (if known): _____

Birth Order (please list ages of biological siblings): _____

Family/Living Situation: _____

Children: _____

Occupation: _____

Exercise/Recreation: _____

History

1. Have you lived or traveled outside of the United States? If so, when and where

2. Have you or your family recently experienced any major life changes? If so, please comment:

3. Have you experienced any major losses in life? If so, please comment:

4. How much time have you had to take off from work or school in the last year?

- ☐ 0 to 2 days
- ☐ 3 to 14 days
- ☐ more than 15 days

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Health Concerns

5. What are your main health concerns? (Describe in detail, including the severity of the symptoms):

6. When did you first experience these concerns?

7. How have you dealt with these concerns in the past?

- ☐ doctors
- ☐ self-care

8. Have you experienced any success with these approaches?

9. What other health practitioners are you currently seeing? List name, specialty and phone # below.

10. Please list the date and description of any surgical procedures you have had (including breast reduction or augmentation).

11. How often did you take antibiotics in infancy/childhood?

12. How often have you taken antibiotics as a teen?

13. How often have you taken antibiotics as an adult?

14. List any medicine you are currently taking:

15. List all vitamins, minerals, herbs and nutritional supplements you are now taking:

16. Have any other family members had similar problems (describe)?

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Nutritional Status

17. Are there any foods that you avoid because of the way they make you feel?
    If yes, please name the food and the symptom:

18. Do you have symptoms immediately after eating like bloating, gas, sneezing or hives?
    If so, please explain:

19. Are you aware of any delayed symptoms after eating certain foods such as fatigue, muscle aches, sinus congestion, etc? If so, please explain?

20. Are there foods that you crave? If so, please explain:

21. Describe your diet at the onset of your health concerns:

22. Do you have any known food allergies or sensitivities?

Health Concerns

23. Which of the following foods do you consume regularly?

- ☐ soda
- ☐ diet soda
- ☐ refined sugar
- ☐ alcohol
- ☐ fast food
- ☐ gluten (wheat, rye, barley)
- ☐ dairy (milk, cheese, yogurt)
- ☐ coffee

24. Are you currently on a special diet?

- ☐ autoimmune paleo (AIP)
- ☐ SCD/GAPS
- ☐ dairy restricted or dairy-free
- ☐ vegetarian
- ☐ vegan
- ☐ paleo
- ☐ blood type
- ☐ raw
- ☐ refined sugar-free
- ☐ gluten-free
- ☐ Other (please describe)

25. What percentage of your meals are home-cooked?

- ☐ 10
- ☐ 20
- ☐ 30
- ☐ 40
- ☐ 50
- ☐ 60
- ☐ 70
- ☐ 80
- ☐ 90
- ☐ 100

26. Is there anything else we should know about your current diet, history or relationship to food?

Intestinal Status

27. Bowel Movement Frequency

- ☐ 1–3 times per day
- ☐ more than 3 times per day
- ☐ not regularly every day

28. Bowel Movement Consistency

- ☐ soft & well formed
- ☐ often float
- ☐ difficult to pass
- ☐ diarrhea
- ☐ thin, long or narrow
- ☐ small and hard
- ☐ loose but not watery
- ☐ alternating between hard and loose

29. Bowel Movement Color

- ☐ medium brown
- ☐ very dark or black
- ☐ greenish
- ☐ blood is visible
- ☐ variable
- ☐ yellow, light brown
- ☐ chalky colored
- ☐ greasy, shiny

30. Do you experience intestinal gas? If so, please explain if it is excessive, occasional, odorous, etc:

31. Have you ever had food poisoning? If yes, please describe in detail, including:
1) Where you were
2) What did you treat it with and
3) If you feel like you fully recovered from it:

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Medical Status

32. Please check any of the following conditions that apply to your history and briefly describe your symptoms, chosen treatment(s), and dates.

- ☐ Cancer
- ☐ Heart Disease
- ☐ Hepatitis
- ☐ Venereal Disease
- ☐ Diabetes
- ☐ High Blood Pressure
- ☐ High Cholesterol
- ☐ Kidney Disease
- ☐ Thyroid Disease
- ☐ Depression
- ☐ Asthma
- ☐ Allergies
- ☐ Anemia
- ☐ Chronic Yeast Infections
- ☐ Concussions or head injuries (major or minor)
- ☐ Other

Please briefly describe your symptoms, chosen treatment(s) and dates of the above checked conditions:

33. Please check frequency of the following:

Short term memory impairment	☐ yes	☐ no	☐ sometimes
Shortened focus of attention and ability to concentrate	☐ yes	☐ no	☐ sometimes
Coordination and balance problems	☐ yes	☐ no	☐ sometimes
Problems with lack of inhibition	☐ yes	☐ no	☐ sometimes
Poor organization abilities	☐ yes	☐ no	☐ sometimes
Problems with time management (late or forget appts)	☐ yes	☐ no	☐ sometimes
Mood instability	☐ yes	☐ no	☐ sometimes
Difficulty understanding speech and word finding	☐ yes	☐ no	☐ sometimes
Brain fog, brain fatigue	☐ yes	☐ no	☐ sometimes
Lower effectiveness at work, home or school	☐ yes	☐ no	☐ sometimes
Judgment problems like leaving the stove on, etc	☐ yes	☐ no	☐ sometimes

Health Hazards

34. Have you been exposed to any chemicals or toxic metals (lead, mercury, arsenic, aluminum)?

35. Do odors affect you?

36. Are you or have you been exposed to second-hand smoke?

Oral Health History

37. How long since you last visited the dentist? What was the reason for that visit?

38. In the past 12 months has a dentist or hygienist talked to you about your oral health, blood sugar or other health concerns? (Explain.)

39. What is your current oral and dental regimen? (Please note whether this regimen is once or twice daily or occasionally and what kind of toothpaste you use.)

40. Do you have any mercury amalgams? (If no, were they removed? If so, how?)

41. Do you have any concerns about your oral or dental health?

42. Is there anything else about your current oral or dental health or health history that you'd like me to know?

Lifestyle History

43. Have you had periods of eating junk food, binge eating or dieting? List any known diet that you have been on for a significant amount of time.

44. Have you used or abused alcohol, drugs, meds, tobacco or caffeine? Do you still?

45. How do you handle stress?

Sleep History

46. Are you satisfied with your sleep?

47. Do you stay awake all day without dozing?

48. Are you asleep (or trying to sleep) between 2:00 a.m. and 4:00 a.m.?

49. Do you fall asleep in less than 30 minutes?

50. Do you sleep between 6 and 8 hours per night?

For Women Only

51. How old were you when you first got your period?

52. How are/were your menses? Do/did you have PMS? Painful periods? If so, explain.

53. In the second half of your cycle do you experience any symptoms of breast tenderness, water retention or irritability?

54. Have you experienced any yeast infections or urinary tract infections? Are they regular?

55. Have you/do you still take birth control pills: If so, please list length of time and type.

56. Have you had any problems with conception or pregnancy?

57. Are you taking any hormone replacement therapy or hormonal supportive herbs? If so, please list again here.

Sexual History

58. Do you have any concerns or issues with your sexual functioning that you'd like to share with me (pain with intercourse, dryness, libido issues, erectile dysfunction)?

59. In the past year, have your sexual partners been men, women, or both? And how many partners have you had in the past year?

Mental Health Status

60. How are your moods in general? Do you experience more anxiety, depression or anger than you would like?

61. On a scale of 1-10, one being the worst and 10 being the best, describe your usual level of energy.

62. At what point in your life did you feel best? Why?

Other

63. Do you think family and friends will be supportive of you making health and lifestyle changes toimprove your quality of life? Explain, if no.

64. Who in you family or on your health care team will be most supportive of you making dietary change?

65. Please describe any other information you think would be useful in helping to address your health concern(s):

66. What are your health goals and aspirations?

67. Though it may seem odd, please consider why you might want to achieve that for yourself:

Thank you!