

Comprehensive Holistic Health & Wellness Intake

Patient's name: _____

Telephone: _____ Email: _____

Preferred Communication Method

- ☐ Verbal conversation
 ☐ Written communication
 ☐ Patient portal
 ☐ Support person present

Accessibility Requirements

- ☐ Large print required
 ☐ Translation services
 ☐ Quiet environment due to sensory sensitivities

Cognitive Support *(requirements to fully process information)*. Does the patient need:

- ☐ Information broken down into simple steps
 ☐ Visual aids
 ☐ Extended consultation time

Trust and Safety: To build trust and avoid re-traumatization, establish a comfortable environment and ask the patient about any previous negative health-care experiences.

Mind-Body Connection: Assess current stress levels, coping mechanisms and mental health history (including trauma and anxiety), which significantly impact physical health.

Lifestyle and Environment: Inquire about diet, sleep patterns, physical activity, alcohol/tobacco/substance use and exposure to environmental toxins (e.g., in water or air quality).

Social and Community: Document the patient's support network, living situation, and involvement in community or cultural activities. Understand how these factors contribute to their overall health.

Cultural and Spiritual Beliefs: Understand the patient's cultural practices or spiritual beliefs that may influence their health decisions or views on specific treatments.

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Trauma-Informed Approach: Screen for a history of trauma, which is common and has profound impacts on health. Ensure questions are sensitive and asked in a safe, nonjudgmental manner.

Geographic and Travel Logistics: Document distance to the nearest pharmacy, clinic, or hospital, typical travel time, and available transportation methods (e.g., personal vehicle, community transport, flight services).

Pharmacy Access: Identify the patient's primary pharmacy and ask about their current method for obtaining refills (e.g., mail order, in-person pickup, community health representative [CHR] delivery).

Cold Chain Management: If the patient requires refrigerated medications, assess their ability to store them safely and reliably at home.

Supply Consistency: Inquire about past issues with medication stock shortages or delays in delivery to their location.

Technology Access: Assess the availability and reliability of internet and phone service, which is crucial for telehealth consultations and accessing online health resources.

Resource Navigation: Connect patients with CHRs or patient navigators who can assist with logistics, such as arranging travel for appointments or coordinating mail-order prescriptions.