

CONSULTATION CHECKLIST

Client:

Date:

BEFORE FIRST VISIT

- Have the client sign the *Disclaimer*.
- Have the client complete a *Food & Mood Journal* for at least 3 days.
- Have the client complete a *NAQ*.
- Have the client complete the *Initial Interview Questionnaire*.
- Complete a *Consultation Plan* for the first visit.

DURING FIRST VISIT

- Focus on building rapport and putting the client at ease.
- Review the *Initial Interview Questionnaire*, *Food & Mood Journal*, and *NAQ*.
- Complete a *Functional Evaluation Form*.
- Complete a *Clinical Presentation Form* and *Recommendations Form*.
- Take payment, agree upon a meeting schedule, and schedule the next visit.

BEFORE SECOND VISIT

- Print out and interpret the client's *Symptom Burden Report* from Nutri-Q.
- Review the *Clinical Presentation Form* and *Recommendations Form*.

DURING SECOND VISIT

- Review the *Clinical Presentation Form* and *Recommendations Form* with the client.
- Complete a new *Functional Evaluation Form* and compare to previous FE results.
- Complete a new *Clinical Presentation Form* and *Recommendations Form*.
- Complete a *Re-Evaluation Form*.

CONSULTATION CHECKLIST

SUBSEQUENT VISITS

- Review previous *Clinical Presentation Forms* and *Recommendations Forms*.
- Complete new *Clinical Presentation Forms* and *Recommendations Forms*.
- Complete new *Re-Evaluation Forms*.

NOTES