


# PM Case Review — Part 2



**Mold Survey**

**ENVIRONMENTAL EXPOSURE**  
Please answer the following questions:

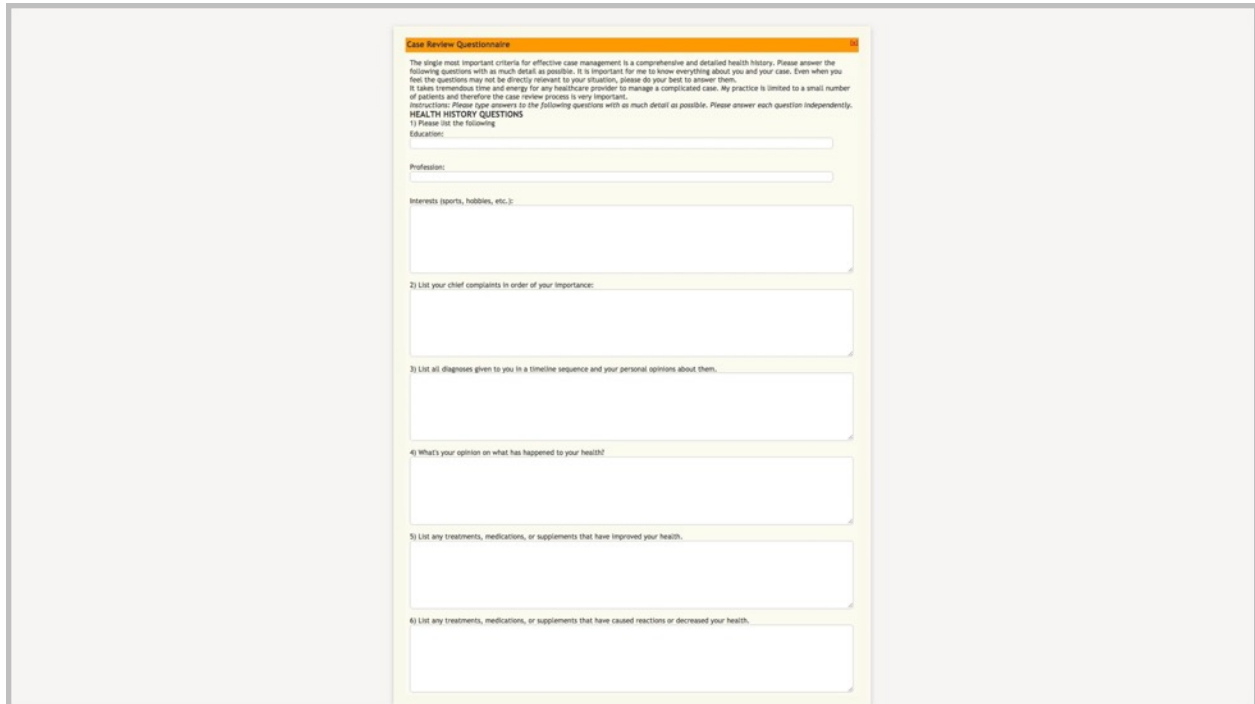
	Yes	No	Unknown
1) Do you have exposure to the interior building of a water damaged building and/or microbial growth? If yes, please answer the next three (3) questions:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
a. Do you have samples/evidence of spore or genus and species of Fungus (air test, Etest test, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Is there visible microbial growth (mold)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Is there a presence of musty smells?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2) Do you remember a tick bite occurring before your illness beginning? If yes, please answer the next two (2) questions:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
a. Did you have an unexplained rash after the bite?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Did you experience flu-like illness after the bite?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3) Have you had a brown recluse or other poisonous spider bite? If yes:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
a. Did you experience flu-like illness after the bite?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4) Did you become ill after eating fish?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5) Did you become ill after exposure to a body of fresh water?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6) Did you become ill after exposure to the ocean during a Red Tide or other bloom?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7) Did you become ill after exposure to an estuary fish kill?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8) Did you become ill after exposure to a closed shell fish bed area?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**ASSOCIATED ILLNESSES**  
Please mark yes or no:

	Yes	No
Illness	<input type="radio"/>	<input type="radio"/>
Tick borne illness	<input type="radio"/>	<input type="radio"/>
Lyme Disease	<input type="radio"/>	<input type="radio"/>
Fibromyalgia	<input type="radio"/>	<input type="radio"/>
Chronic Fatigue Syndrome	<input type="radio"/>	<input type="radio"/>
Gulf War Syndrome	<input type="radio"/>	<input type="radio"/>
Chemical Sensitivity	<input type="radio"/>	<input type="radio"/>
Sick Building Syndrome	<input type="radio"/>	<input type="radio"/>
Fungus or Mycetozoa	<input type="radio"/>	<input type="radio"/>
Depression	<input type="radio"/>	<input type="radio"/>
Chronic Soft Tissue Injury	<input type="radio"/>	<input type="radio"/>
Irritable Bowel Syndrome	<input type="radio"/>	<input type="radio"/>
Bacteria	<input type="radio"/>	<input type="radio"/>
Bell's Palsy	<input type="radio"/>	<input type="radio"/>
Phlebotomy	<input type="radio"/>	<input type="radio"/>
Sensory Neural Hearing Loss	<input type="radio"/>	<input type="radio"/>
Ciguatera Seafood Poisoning	<input type="radio"/>	<input type="radio"/>
Any Learning Disability	<input type="radio"/>	<input type="radio"/>
Autism	<input type="radio"/>	<input type="radio"/>
Attention Deficit Disorder	<input type="radio"/>	<input type="radio"/>
Charcot Marie Tooth Syndrome	<input type="radio"/>	<input type="radio"/>
Alzheimer's Disease	<input type="radio"/>	<input type="radio"/>
Parkinson's Disease	<input type="radio"/>	<input type="radio"/>
Amyotrophic Lateral Sclerosis	<input type="radio"/>	<input type="radio"/>
Multiple Sclerosis	<input type="radio"/>	<input type="radio"/>
Diabetes	<input type="radio"/>	<input type="radio"/>
Ocular Disease (e.g., cataracts)	<input type="radio"/>	<input type="radio"/>
Retinal Disease (e.g., glaucoma)	<input type="radio"/>	<input type="radio"/>
Low Vision or Blindness	<input type="radio"/>	<input type="radio"/>
Another Condition Involving Neurological Function	<input type="radio"/>	<input type="radio"/>

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Next part of the intake paperwork is the environmental exposure survey. So this is where we ask them how likely it is that they've been exposed to mold, if they have any known exposure to illness that's related to consuming fish or being exposed to a body of fresh water, so all of this is related to chronic inflammatory response syndrome or biotoxin illness, and then we have some questions related to Lyme disease, tick-borne illness, fibromyalgia, chronic fatigue, if they've been diagnosed with any of these conditions, depression, etc.



**Case Review Questionnaire**

The single most important criteria for effective case management is a comprehensive and detailed health history. Please answer the following questions with as much detail as possible. It is important for me to know everything about you and your case. Even when you feel the questions may not be directly relevant to your situation, please do your best to answer them. It takes tremendous time and energy for any healthcare provider to manage a complicated case. My practice is limited to a small number of patients and therefore the case review process is very important. Instructions: Please type answers to the following questions with as much detail as possible. Please answer each question independently.

**HEALTH HISTORY QUESTIONS**

1) Please list the following:

Education: \_\_\_\_\_

Profession: \_\_\_\_\_

Interests (sports, hobbies, etc.): \_\_\_\_\_

2) List your chief complaints in order of your importance: \_\_\_\_\_

3) List all diagnoses given to you in a timeline sequence and your personal opinions about them. \_\_\_\_\_

4) What's your opinion on what has happened to your health? \_\_\_\_\_

5) List any treatments, medications, or supplements that have improved your health. \_\_\_\_\_

6) List any treatments, medications, or supplements that have caused reactions or decreased your health. \_\_\_\_\_

From there, we move into detailed health history questions. So these questions are really important; they give me a lot of insight into the patient's health history and their own opinions about their health. So if you see here, we ask their basic demographics, chief complaints in order of importance, that's really helpful. As functional medicine practitioners, we're concerned less with symptoms than maybe doctors might be in conventional medicine, since a lot of conventional medicine is oriented around symptom suppression. But we are definitely concerned with chief complaints, and if you don't help a patient with their main complaints, you're not going to have many patients for very long, so it's really crucial to focus in on your patient's complaints and give them some relief and address their complaints as soon as possible. I think we talked about the root-branch idea earlier in the functional medicine unit, and in functional medicine, our goal is definitely to address the root, the root cause of a problem, but sometimes we also have to address the branch in order to give patients some relief. So then I ask questions about, like, what's your opinion on what's happened to your health. That's often a very illuminating question; patients know themselves much better than you do, especially at this point, and they often have pretty good insight into what's going on with them, so it's really important to pay attention to the answers to those questions. Then we ask if there are any treatments or medications that have improved their health, any treatments or medications that have decreased their health, there's a question further up there about any diagnoses that they've been given and what their opinion is about those.

7) List in a timeline sequence any medical procedures or surgeries you have had:

**PERSONAL OPINION QUESTIONS**  
 \*Please do not answer "I don't know" to any of these questions.\*

1) Why do you think healthcare practitioners have failed with your case?

2) What are you looking for in a healthcare practitioner?

3) What do you consider a realistic window of time to see changes in your health under our care?

4) Are you prepared to pay for the laboratory testing, consulting fees and nutritional supplements that may be required to successfully manage your condition?

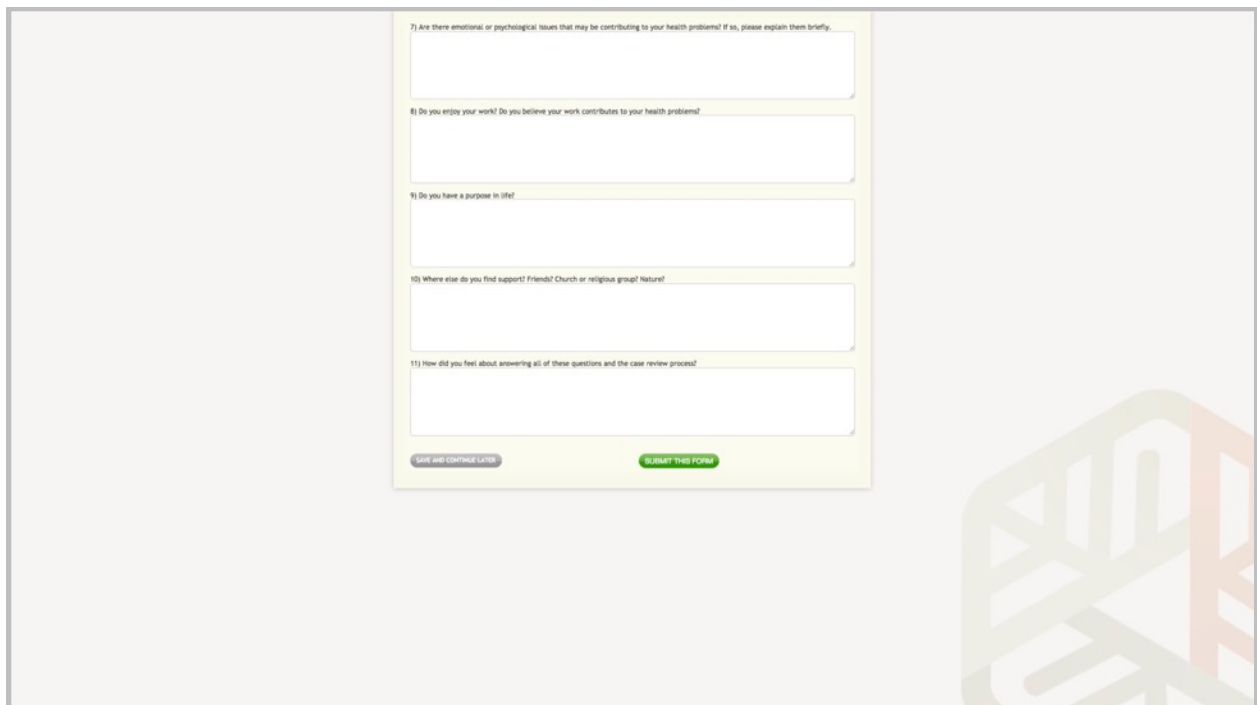
5) On a scale of 1 to 10, how committed are you to recovering your health?

Why?

6) What obstacles or beliefs, if any, stand in the way of you recovering your health?

We ask a timeline sequence, any medical procedures or surgeries, and then here are the personal opinion questions, and you see I have at the top there, “Please don’t answer ‘I don’t know’ to any of these questions.” You’ll find that some people still do, or sometimes people answer yes or no; that can give you a lot of information itself. I have to say that men are more likely to do that; it’s harder for men, culturally, at least in our dominant paradigm, to share their feelings about their situation or even be aware of them in the first place, but that can tell you something on its own. I ask why they think healthcare practitioners have failed with their case; you know, for some people, the answer is, “I don’t think healthcare practitioners have failed, I haven’t really seen any doctors, or they’ve done the best that they can,” and that’s fair. A lot of my patients, however, have seen numerous doctors and they haven’t had any relief, and so this can give me some insight into what the patient is really looking for in their interaction with me and why they think other practitioners have failed. I ask what they’re looking for in a healthcare practitioner. I ask what a realistic window of time is to see changes in their opinion; that’s an important question—if you see someone say a week or two weeks, that’s a little bit of a red flag, typically. If you’re working with patients who have chronic illness, and they think they’re going to get better in a week or two, that’s a discussion that you’re probably going to need to have right off the bat. Are you prepared to pay for the laboratory testing, consulting fees, and nutritional supplements that may be required to successfully manage your condition? This is just a helpful question because unfortunately, for now, functional medicine is often fairly expensive out of pocket, and it’s good to know where the patient stands there so you can work with them appropriately. Question number five, on a scale of one to ten, how committed are you to recovering your health? Very revealing question, and I ask why, so if they say seven, they might say, “I’m totally committed but I have limited financial resources.” That’s helpful for you to know right off the bat, or they might say eight, and the reason it’s an eight is, “Because I’ve been to so many doctors and tried so many things that I’ve just lost a little bit of

faith.” That’s also helpful for you to know, so these questions can really help you to guide treatment and know who it is you’re working with and how you need to tailor the treatment accordingly. Question six, what obstacles or beliefs, if any, stand in the way of you recovering your health? Also very illuminating; patients will often just tell you right off the bat the main things you’re going to be dealing with as a clinician in terms of obstacles, and you can respond accordingly.



7) Are there emotional or psychological issues that may be contributing to your health problems? If so, please explain them briefly.

8) Do you enjoy your work? Do you believe your work contributes to your health problems?

9) Do you have a purpose in life?

10) Where else do you find support? Friends? Church or religious group? Nature?

11) How did you feel about answering all of these questions and the case review process?

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Question number seven, are there emotional or psychological issues that may be contributing to your health problems? If so please explain them briefly. Again, very revealing and important, both for the patient to be aware of and for you to be aware of as a clinician. Question number eight, do you enjoy your work, do you believe your work contributes to your health problems? Very important because the answer is often yes for many people, and just raising awareness about this is helpful. Do you have a purpose in life, question number nine; I believe this is one of the key ingredients, not only to happiness overall, for everybody, but when people are struggling with a chronic illness, if they don’t have a purpose or something that inspires them and makes them feel alive and contributes meaning to their life, then it’s going to make everything else a lot harder, and this is a discussion that you can have with your patients, especially if the answer here is no. Question number 10, where else do you find support, friends, church or religious groups, nature as examples, and you want to pay close attention to this as well because as we’ve discussed, social support is more predictive of future risk of death than smoking 15 cigarettes or body mass index or air pollution or other factors that are conventionally considered to be really big risk factors, so it’s really crucial that patients find some support, if they don’t have any support. So if you see an answer to that question that indicates they don’t have support, that’s a discussion that you need to have with them. And then question number 11, how did you feel about answering all these

questions in the case review process? This single question here will tell you probably more about how easy or difficult the patient will be to work with than any other question. Oftentimes, what we'll see here is the patient is really overjoyed with the process; they might say it was hard or it was time-consuming or it was really cathartic, just the process of going through the questionnaire itself was therapeutic. For a lot of people, it can bring them to tears; they'll often feel very grateful and appreciative, they'll actually say that no one's ever taken the time to ask them these questions and see everything in one place, and they're really excited about the case review. Those patients are going to be easier to work with. In some cases, you'll see a one-word answer like "fine" or you'll see some complaint about the time that it took. That's a heads-up that that patient might be a little bit more difficult to work with. So this questionnaire has been vital for me. I've tweaked it over the years, and I haven't made any changes over the last year or two because it works really well. Of course, you're free to change it in any way that you need to, but if you're just starting out, it's a really great place to begin.