

1. Welcome, build rapport
2. Describe what you do and how you do it
3. Set expectations for the intake
4. Turn the session over to them to tell their story. Be present. No distractions.
5. Free TEXT: Listen and take notes in whatever form you learn
6. Eventually ask questions for clarification; refer to the intake for details.
7. Validate Rx, OTC, Supplements
8. NFPEs expedited with use of cell phone camera
9. "Is there family history that concerns you?"
10. Surprisingly food is rarely discussed during the intake session.
11. Wrap-up: paraphrasing the client's story
12. Wrap-up: expectations about plan moving forward
13. Wrap-up: agree homework, new supplements, recommended lab tests
14. Complete charting:
 - Subjective
 - Objective
 - Assessment
 - Plan
 - Be sure to include homework
 - Be sure to include any relational details of importance