**Convergent Points**

**An East West Case Report Journal**

# FIRST OFFICE CALL

# INTAKE TEMPLATE

## Subjective:

\_\_\_\_\_\_ is a \_\_\_ year old \_\_\_\_ who presents for evaluation and treatment of \_\_\_\_\_\_\_

(No chief complaint on file) \_\_\_\_

## Primary concerns and symptoms of the patient:

**CC1:** \_\_\_\_\_

Onset:

Location:

Characteristics:

Timing:

What helps, and what makes it worse:

Severity (1-10 scale with 10 being worst):

Related problems:

**CC2:** \_\_\_\_\_

Onset:

Location:

Characteristics:

Timing:

What helps, and what makes it worse:

Severity (1-10 scale with 10 being worst):

Related problems:

## Medical, family, and psychoemotional/social history including relevant genetic information and any traumas:

## Current medications:

## Relevant past interventions with outcomes:

## ROS/10 Questions:

Temperature and Perspiration:

HEENT (head, ears, eyes, nose, throat):

Skin:

Musculoskeletal (back, neck, and extremities):

Chest and abdomen:

Thirst and appetite:

Elimination:

Reproductive health:

Sleep (including total hours and interruptions):

Psychoemotional:

## Objective:

Relevant lab results:

Physical examination:

Tongue:

Pulse:

## Assessment:

Relevant biomedical diagnosis:

TCM/ or other traditional Asian medicine diagnosis and rationale:

Prognosis:

## Plan/ therapeutic intervention:

Acupuncture (type of needle, points, depth, type of stimulation, uni or bilateral, frequency/frequencies and amperage with estim):

First 15 Minutes:

Second 15 Minutes:

Needles in:

Needles out:

Herbal prescription:

Other treatment modalities, including self-care instructions:

## Post tx clinician and patient-assessed outcomes (including immediate follow up of any 1/10 score, e.g. pain, anxiety, etc.):

## Treatment notes: