

GROUP VISIT TOOLKIT

Essentials of Immune Health



Improve the health of your patients
with meaningful information

- *Easy to implement*
- *Cost-effective*
- *Time-efficient*
- *Insurance-friendly*

Your patients want to change... now you have the tools

This powerful toolkit educates patients on how to build and maintain an intelligent and strong immune system. By exploring the microbiome, stress, environmental triggers, detoxification and inflammation, patients will understand the key lifestyle choices necessary to defend and repair their bodies from harmful triggers that lead to immune suppression and increased risk for autoimmune diseases.

Use for patients with these issues:

- Allergies/Asthma
- Eczema
- Hashimoto's Thyroiditis
- Frequent Infections
- Lyme Disease
- Rheumatoid Arthritis
- IBS/IBD

THIS GROUP VISIT TOOLKIT INCLUDES:



Visit Forms:

Patient intake forms are designed to capture key information to create efficient, insurance-friendly patient encounters.



Patient Handout(s):

Patient-friendly handout(s) assist you and improve the implementation of key lifestyle tips necessary to correct underlying causes of illness.



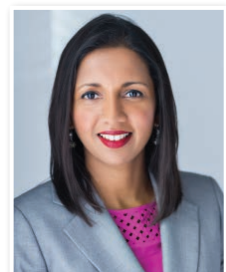
Multi-Media Education:

Choose the best format to suit your presentation style

- Video + audio version
- Presentation slides for custom education

Ideal use for a Group Visit or one-on-one setting

Shilpa P. Saxena, MD is a Board-Certified Family Practice physician whose passion and purpose come to life through sharing her innovative patient education and practice management solutions in her classic 'keep it simple' style. She serves as Faculty with the Institute for Functional Medicine, the Arizona Center for Integrative Medicine, the University of Miami, Miller School of Medicine, and the Metabolic Medical Institute at George Washington University. Dr. Saxena is an expert in the Group Visit medical model, creator of Group Visit Toolkits, and co-author of *The Ingredients Matter: India*.





CC: Immune System Issues

Patient Name: _____ Date of visit: _____

_____ (initial) I understand as a participant in this Group Visit/Shared Medical Appointment, that I and other patients will discuss medical information in the presence of other patients, people, staff, and the clinician. If I have medical concerns that are of a very private nature, I will request to discuss with the clinician in a private setting or will schedule an individual office visit. I will also respect the confidentiality of the other members of the group by not revealing medical, personal, or any other identifying information about others in attendance after the session is over.

CC (circle all that apply):	Allergies (Env't/Food)	Eczema	Asthma	Hashimoto's Thyroiditis
Frequent sinus infections	Lyme disease	Graves disease	Lupus	Rheumatoid Arthritis
Frequent ear infections	IBS- Diarrhea	Ulcerative Colitis	Crohn's	Multiple Sclerosis
Frequent throat infections	IBS- Constipation	Scleroderma	HIV/AIDS	Genetic Immune Deficiency

List your chief immune concern and answer questions below accordingly: _____

- How long ago did your symptoms start? _____ days weeks months years
- My symptoms are mild moderate severe annoying life-changing disabling
- This conditions is mostly getting better basically the same getting worse
- Associated Risk: I take antibiotics more than 1x/year without using probiotics. Yes No
- Associated Risk: Digestive function of minor concern occasionally concerning a regular concern
- Associated Risk: History of severe infection (required hospitalization, specialist, or IV antibiotics) No
Yes (Date/Description: _____)

Review of Systems: (check all symptoms you currently are experiencing)

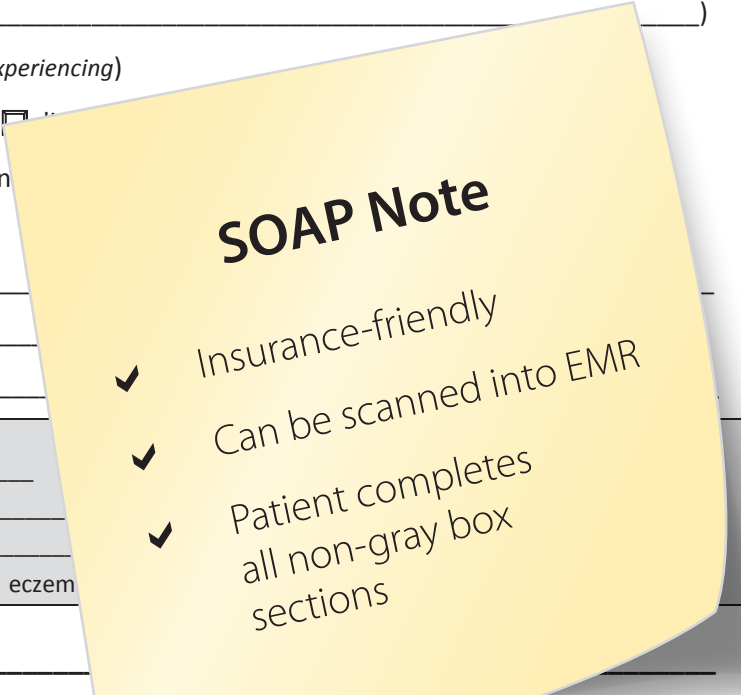
- nasal drip wheezing constipation _____
- unexplained rash swollen joints unexplain _____

Family History: (check and list all that apply)

- Autoimmune conditions: _____
- Gastrointestinal issues: _____
- Allergy issues: _____

Exam:

- Vitals: Weight: _____ BP: _____
- Lymphatic: No adenopathy Abnl _____
- Lungs: CTA bilaterally, NI effort Abnl _____
- Skin: NI Abnl keratosis pilaris eczem _____



Assessment/Plan: _____

<input checked="" type="checkbox"/> Patient requested to complete questionnaires to better assess immune health status	<input type="checkbox"/> Patient _____ assess GI status.
<input checked="" type="checkbox"/> Patient educated on barrier integrity, detox, age-related immune recommendations and immune modulators.	<input type="checkbox"/> Patient _____ to further assess autoimmunity.
<input checked="" type="checkbox"/> Take medications as prescribed unless directed otherwise.	<input type="checkbox"/> Labs/Te _____
	<input type="checkbox"/> Follow-up (select): As needed For further evaluation
	<input type="checkbox"/> With whom: _____
	<input type="checkbox"/> When: _____
	<input type="checkbox"/> For what: _____

Provider Signature: _____ Date: _____

Essentials of Immune Health



Immune development begins before birth, and a variety of factors influence its activity (both positively and negatively) throughout the life span. Factors that include age,

Join us to learn how you can
build immune reserves and stre

Event Flyer

- ✓ Market to office patients
- ✓ Market to the greater community
- ✓ Customizable Word format

LOGO AREA

Start building a strong and intelligent immune system today!
Register for our upcoming patient Group Visit

Date/Time/Location



GROUP VISIT

Essentials of Immune Health

Designing and Maintaining an Intelligent and Strong Defense Strategy

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Our Immune System Works Like Our Troops

U.S. Air Force – "Aim High: Fly-Fight-Win"

U.S. Marine Corps – "Semper Fidelis"

U.S. Coast Guard – "Semper Paratus"

U.S. Army – "This We'll Defend."



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To develop a HEALTHY IMMUNE SYSTEM, it must ...

- have a good foundation in the early stages.
- be trained effectively.
- be strong enough to defend against potential threats.
- be smart enough to avoid autoimmunity.

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PowerPoint Slides

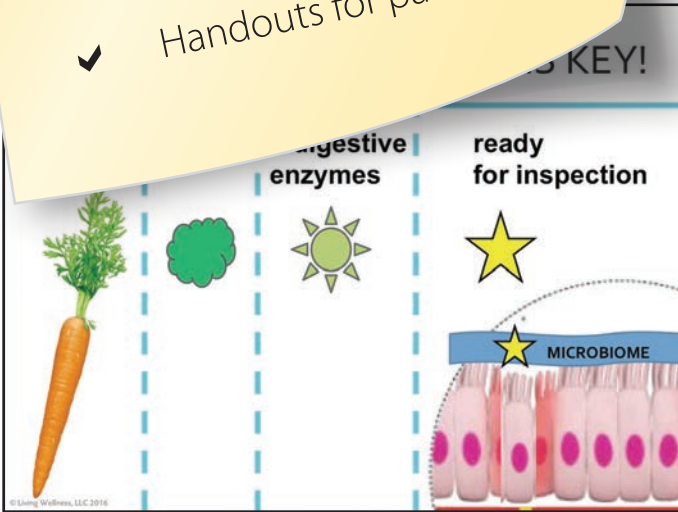
- ✓ Concepts reviewed in video
- ✓ PPT slide files for clinician to present and modify as needed
- ✓ Handouts for patients

1. Secure the Borders

- Most of your immune system lives in your gut lining.
- Proper digestion supports a healthy immune system.

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KEY!



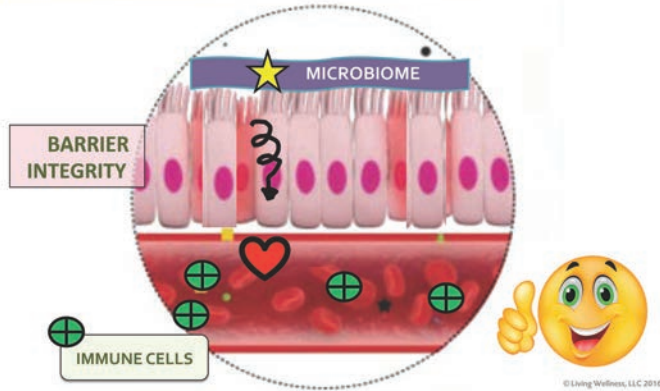
digestive enzymes

ready for inspection

MICROBIOME

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THE CORRECT PATHWAY



A PROPER SECURITY PROCESS

STEPS THAT MUST GO RIGHT:

- ✓ Chew
- ✓ Add saliva
- ✓ Transport via esophagus
- ✓ Add stomach acid
- ✓ Add digestive enzymes

- ❑ INSPECTION AT THE GUT LINING
- ❑ ACCESS GRANTED TO BLOODSTREAM & BODY

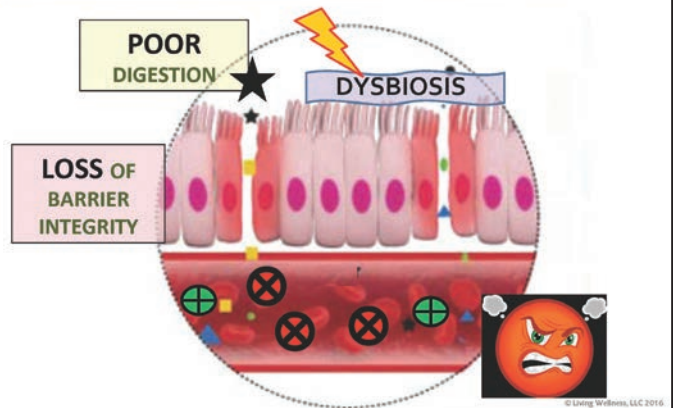


- ❑ "PRESENTABLE" to the gut's immune system

There is a defined process for maximum security, but...



Many factors can weaken the system.

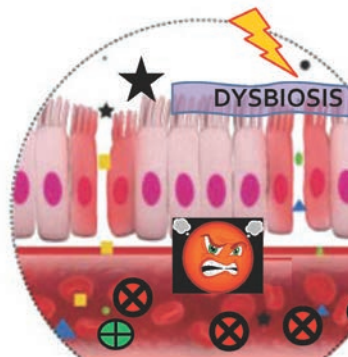


HARMFUL ENVIRONMENT:

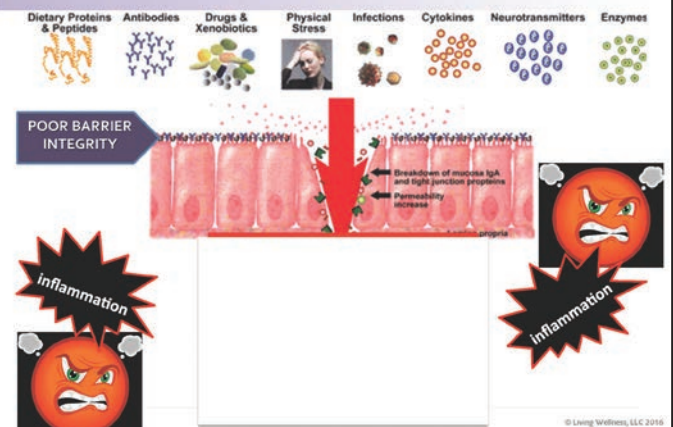
- Rx drugs (e.g. antibiotics)
- Bad germs
 - Bacteria
 - Parasites
 - Yeast

POOR LIFESTYLE:

- Foods
 - Less gut-nourishing foods
 - More food 'allergens'
- Stress
- Excess body fat



THE BIG PICTURE PERSPECTIVE



2. Develop Strategic Alliances

- The gut lining has many 'tenants.'
- It is important to have the right balance of tenants for a healthy 'neighborhood' (aka healthy microbiome).

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All the Tenants = MICROBIOME

MORE beneficial bacteria
LESS germs



3. Eliminate the Enemy Presence

- Community hygiene
- Personal hygiene

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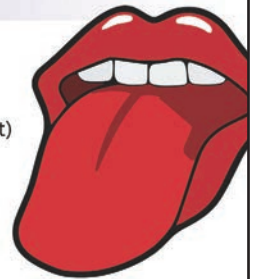
Better Hygiene

COMMUNITY HYGIENE:

- Foodborne illness (home & restaurant)
- Sexually transmitted infections

PERSONAL HYGIENE:

- Hand washing
- Regular bathing
- Oral hygiene



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4. Avoid Enemy Territory

- Enemies are different for children vs. adults vs. seniors.
- Follow the right recommendation based on how strong and wise your immune system is at your stage in life.

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How Much Exposure is OK?

MORE: kids - safe exposure for 'germ defense training'

SOME: adults – identify allergens and improve lifestyle

LESS: seniors – avoid antigens (germs) and chronic inflammation



5. Fortify Your Arsenal

- Maintain a good toolbox full of necessary repair supplies.
- Ensure your system has an ongoing fuel source to operate.

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Helping Your Immunity Stay Strong



- Micronutrients and antioxidants from your food and/or supplements serve as your body's toolbox.
- Your mitochondria provide the fuel your immune system needs to defend you.

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6. Operation Damage Control

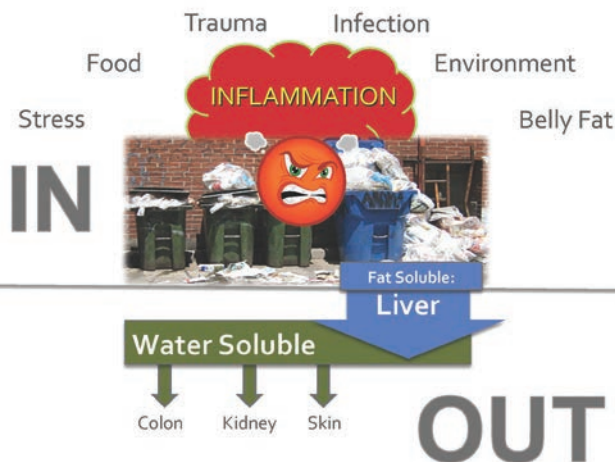
- A well-functioning immune system needs a well-functioning waste management system.
- Regularly cleansing the body directly boosts your immune health.

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Simple Math & Science

IN = OUT

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Top 10 Lifestyle Choices to Decrease Toxin Exposure

1. Use nontoxic cleaning agents.
2. Clean furnace filters regularly; consider HEPA filter
3. Avoid using pesticides/herbicides in home and garden.
4. Use nontoxic building materials and carpets whenever possible in any project or remodel.
5. Limit exposure to electromagnetic radiation.
6. Use filtered water.
7. Consider organic whenever possible.
8. Avoid consumption of large predator fish.
9. Use "natural" cosmetics, nail polish, and fragrances.
10. Do not get amalgam fillings and/or consider removal.

OUTSIDE
YOU

INSIDE
YOU

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Your Waste Management Plan

↓ **GARBAGE IN** ↑ **GARBAGE OUT**

- | | |
|---|---|
| <ul style="list-style-type: none"> • Identify & eliminate food triggers • Improve stress management • Reduce belly fat • Reduce exposures of environmental toxins | <ul style="list-style-type: none"> • Liver detoxification • Colon elimination • Kidney elimination • Skin elimination |
|---|---|

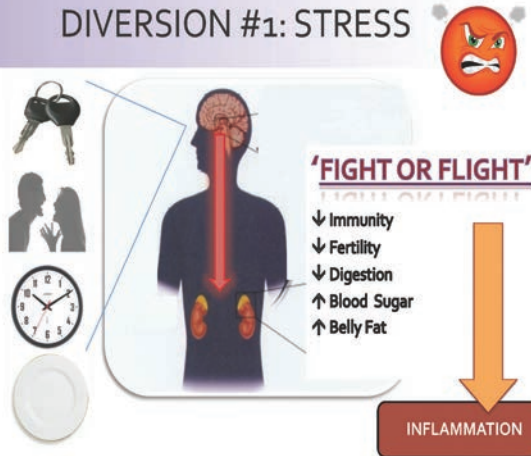
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7. Avoid Diversions

- Long-term physical and/or mental stress weaken your immune system.
- Good lifestyle choices reduce unnecessary inflammation that depletes your defenses.

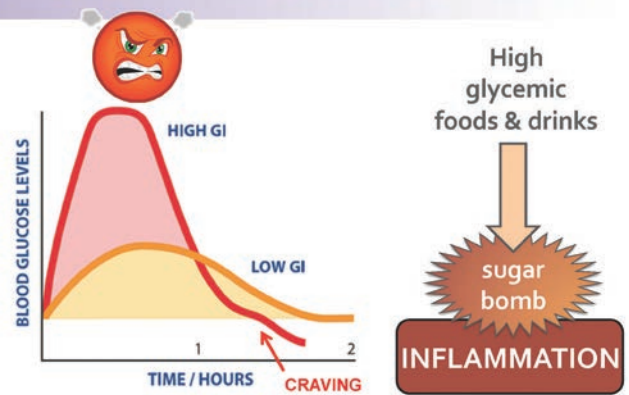
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DIVERSION #1: STRESS



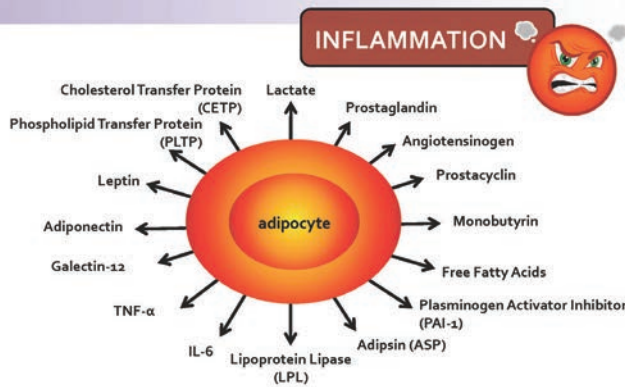
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DIVERSION #2: SUGAR BOMBS



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Excess Body Fat Signals...



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Balance of Inflammation

Inflammation

- ↑ Pain
- ↑ Swelling
- ↑ Blood Clotting
- ↑ Warmth/Redness
- Vessel Constriction

Useful in
SHORT TERM

ANTI-Inflammation

- ↓ Pain
- ↓ Swelling
- ↓ Blood Clotting
- ↓ Warmth/Redness
- Vessel Dilation

Useful in
LONG TERM

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8. Deploy Reinforcements

- A host of extra support is available to your immune system.
- Consider adding if your immune system cannot support itself on its own adequately.

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Immune Modulating Agents

Beneficial bacteria, herbs, botanicals and other natural agents can be used in 2 important ways:

- STRENGTHEN a weak immune system
- EDUCATE a misguided immune system



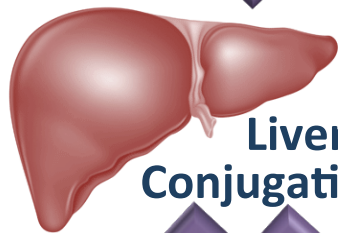
Keep your immune system strong so you have the freedom to live beautifully.

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clinical detoxification pathway



Toxins



**Liver
Conjugation**

Phase I

Key Nutrients

Folate
Glutathione
Antioxidants
Carotenoids
B Vitamins
Vitamin C
Vitamin E

Phase 2

Key Nutrients

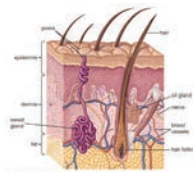
Amino Acids:
- Glutamine
- Glycine
- Cysteine
- Taurine
Sulforaphanes

Elimination

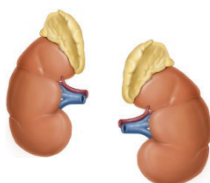
Stool



Sweat



Urine



Your Liver's Work Is Never Done

Garbage from the **OUTSIDE** (exotoxins) can be found in our environment as pesticides, pollution, chemical food additives, alcohol, caffeine and medications.

Garbage from the **INSIDE** occur from various internal biochemical reactions and can include inflammation, excess estrogen, progesterone, cortisol, insulin. Very often, having too much of something is what results in chronic illness.

Patient Handouts

- ✓ Reference concepts learned from group session
- ✓ Reinforce plan of care
- ✓ Customizable with clinic name/logo

Once fat soluble toxins are conjugated, they leave the liver and move on to the colon, kidney or even sweat glands for safe elimination from the body. For this reason, it is essential that these elimination paths out of the body are working well. Conditions like chronic constipation, kidney disease, or inadequate sweating can prevent effective 'garbage removal' and cause health problems when toxins recirculate back into the bloodstream.

understanding your toxin load

By now, you're very aware that toxins are more than just pesticides on your lawn. Toxins are absorbed through our environment, food, alcohol, medications or are created in response to trauma, allergies and/or inflammation.

This chart lists the most common factors that suggest an excess toxin load as well as a number that relates to the relative impact on your body. Take a moment to read through the list and check all the factors that apply to your current lifestyle/condition.

Toxicity Factor	Score	Toxicity Factor	Score
Clean with bleach or other chemical products	3	Smoke \geq 1 pack cigarettes daily	3
Feel nauseas or headache when exposed to strong odors like perfume or cleaning products	2	Smoke < 1 pack cigarettes daily	2
Use non-organic pesticides on your lawn	2	Experience effects from even small amounts of alcohol	1
Environmental or chemical sensitivities	2	Currently use or history of using illegal drugs	3
Significant exposure to harmful chemicals (metals, solvents, paint, herbicides or pesticides)	3	Took or taking hormone replacement therapy	2
Mercury/silver amalgam dental fillings	3	Asthma or allergies (either food or environmental) – 1 point for each	
Eat mostly non-organic fruits and vegetables	2	Chronic fatigue syndrome	2
Eat fruits and vegetables imported from outside the US (Chile, Mexico, China, etc)	2	Parkinson's or Parkinson-like symptoms	3
Ate/eat significant amount of processed foods	2	Drink > 1 alcoholic drinks daily or > 7 per week	1
Eat fast food several times per month	1	Drink > 2 alcoholic drinks daily or >12 per week	2
Take a pain reliever every day or nearly everyday	3	Drink > 3 alcoholic drinks daily or >16 per week	3
Take prescription medication – 1 point for each		Any medical condition ending in 'itis' (i.e., arthritis, bursitis, sinusitis, endocarditis, etc.) – 1 point each	
Experience side-effects from medications at lower or usual doses	2	Family history of an autoimmune condition (Rheumatoid Arthritis, Crohn's Disease, Hashimoto's Thyroiditis, Lupus, Multiple Sclerosis, etc.)	1
Experience effects from caffeine more easily	1	Personal history of an autoimmune condition (Rheumatoid Arthritis, Crohn's Disease, Hashimoto's Thyroiditis, Lupus, Multiple Sclerosis, etc.)	3

Add all points above to calculate your Toxin Load

The higher your Toxicity Load, the more you should consider making changes to your lifestyle and environmental choices. Your goal is to reduce the overall toxicity burden placed on your body every day by making smarter choices regarding food, alcohol, drug use, cleaning supplies, etc. Your body is a machine and requires upkeep the same. It appreciates your good efforts always

Patient Name: _____ **DATE:** _____

your immune health inventory

The development of your immune system began before you were born and continues to change based on choices you make every day. Optimal immune function defends you against potential threats and repairs you when you have been harmed by them. Healthy immune systems must be strong to fight when needed, but equally intelligent to identify a true threat vs. a false alarm. An imbalanced immune system can be weak making you prone to infections, or it may be misguided making you vulnerable to autoimmune disorders.

Many factors ultimately determine if you have a healthy immune system or not. **Please mark a "Y" for Yes and a "P" for Possible in the appropriate column to better assess your immune health history and status.**

PRE-BIRTH - CHILDHOOD	YES OR POSSIBLE	ADULTHOOD - ADVANCED AGE	YES OR POSSIBLE
Family history (genetic potential of gastrointestinal or autoimmunity issues)		Gastrointestinal (GI) infections (e.g. traveller's diarrhea, stomach viruses, food poisoning, etc.)	
Environmental or toxic exposures during pregnancy		Cumulative, multiple antibiotic courses affecting microbiome	
Mother: Illness and medications during pregnancy (e.g. antibiotics, hospitalizations)		Barrier integrity risks due to infections, Rx drugs, toxins, etc.	
Mother: Poor diet and lifestyle during pregnancy (e.g. smoking, alcohol, Rx or recreational drugs)		Chronic stress (with/without) GI symptoms (e.g. abdominal pain, bloating, constipation/diarrhea)	
Born via cesarean section (c-section)		Poor nutrition, processed foods/drinks, low intake of plant-based foods and clean animal protein sources)	
Bottle feeding (with/without) colic/food intolerances (e.g. cow's milk reaction)		Environmental/toxic exposures (e.g. mercury amalgams, occupational exposures)	
Serious or recurrent ear, sinus, throat infections with multiple antibiotic courses			
Regular intake of processed foods and drinks or other poor lifestyle habits		Many years of POOR DIET & LIFESTYLE	
Environmental/toxic exposures during childhood (e.g. mercury amalgams)		Many years of ENVIRONMENTAL, OCCUPATIONAL, & TOXIC EXPOSURES	
Childhood gastrointestinal symptoms (e.g. constipation, bloating, belly pain)		Many years of STRESSFUL SITUATIONS	

Patient Name: _____ DATE: _____

LifestyleMatrix.com