GROUP VISIT TOOLKIT

No Pain, Total Gain

Improve the health of your patients with meaningful information

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

FOR ADDITIONAL GROUP VISIT RESOURCES, VISIT LifestyleMatrix.com
Your patients want to change…now you have the tools

This toolkit educates patients on the lifecycle of pain, where and how we feel pain, and why pain persists and doesn’t resolve for many. By exploring the underlying factors causing pain, patients will recognize patterns and long-term effects of unhealthy behaviors. Understanding the pitfalls of medication dependency and how poor nutrition, lack of exercise, high stress and inadequate sleep all contribute to poor healing and chronic pain, patients will embrace lifestyle choices that create lifelong, optimal health and chronic pain prevention.

Use for patients with these issues:

- Sciatica or leg pain
- Low back pain
- Neck or shoulder pain
- Headaches & migraines
- Sports & accident-related injuries
- Tendonitis
- Autoimmune arthritis
- Osteoarthritis
- Fibromyalgia

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, the Metabolic Medical Institute at George Washington University and most recently, joined the Lifestyle Matrix Resource Center serving as the Clinical Expert for the CM Vitals Program. Dr. Saxena is an expert in the Group Visit medical model, creator of Group Visit Toolkits, and co-author of The Ingredients Matter: India.
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, family members, 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: Pain Associated with Chronic Issue(s):** 1. 2.

<table>
<thead>
<tr>
<th>Location of Pain</th>
<th>Left, Right, Both (circle all that apply)</th>
<th>Intensity (0=none; 10=horrible)</th>
<th>Better, Worse or Same (in last 30 days) (circle all that apply)</th>
<th>Better, Worse or Same (in last 90 days) (circle all that apply)</th>
<th>Things that make it better (e.g., rest, moving, Rx, ice, etc.)</th>
<th>PHYSICAL EXAM (circle all that apply)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head</td>
<td>L R B</td>
<td>B W S</td>
<td>B W S</td>
<td></td>
<td></td>
<td>R-red; S-swollen; D-deformed; W-warm</td>
</tr>
<tr>
<td>Neck</td>
<td>L R B</td>
<td>B W S</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shoulder(s)</td>
<td>L R B</td>
<td>B W S</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elbow(s)</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wrist(s)</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hand(s)</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Back</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hip(s)</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knee(s)</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ankle(s)</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foot</td>
<td>L R B</td>
<td>B W S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Review of Systems** (check all that apply):
- □ Fatigue
- □ Malaise
- □ Unexplained Fevers
- □ Rash
- □ Joint Swelling
- □ Joint Redness
- □ Constipation
- □ Dizziness

**Past Medical History**:

History of motor vehicle accident? □ Yes □ No If yes, how many? __________

In general, do anti-inflammatories (e.g., aspirin and ibuprofen) make your pain better? □ Yes □ No

More often than not, are narcotics (e.g., codeine) what you need to resolve pain? □ Yes □ No □ Depends

**Family History** (check all that apply in your family):
- □ Autoimmune disease (e.g., rheumatoid, lupus, psoriasis, ankylosing spondylitis, etc.)
- □ Gout
- □ Osteoarthritis ("old age" arthritis)
- □ Dependence/Addiction tendencies (e.g., smoking, alcohol, pain medications, illegal drugs of abuse)
ASSESSMENT (to be completed by office):

- Chronic pain syndrome
- Osteoarthritis: Knee, Shoulder, Spine (Lumb, Thor, Cerv) Other
- Autoimmune arthritis (specify) Other
- Overweight, Obese, BMI Other

PLAN OF CARE (to be completed by office):

- Educated on pain physiology, impact of anti-inflammatory lifestyle signals to reduce pain syndromes and improve quality of life
- Refill specified medications as previous: 
- Follow-up for routine pain management appointment in/on 
- **PATIENT REQUESTS additional information on personalized anti-inflammatory lifestyle support for pain and/or medication usage reduction.**

Provider Signature/Date:
No Pain, Total Gain

Did you know that pain affects more Americans than diabetes, cancer and heart disease combined? Occasional aches and pains often turn into frequent pain, driving patients to turn to medications for relief. If the underlying factors contributing to chronic pain are never addressed, patients risk getting caught in the trap of pain pill dependency.

Join us to learn how to avoid getting trapped in a life of pain and understand the lifestyle factors that create lifelong, optimal health and prevent chronic pain.

Event Flyer

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

Are you ready for a pain-free life?
Register for our upcoming patient Group Visit:

Date/Time/Location
PowerPoint Slides

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

No Pain, Total Gain

Group Visit Toolkit

A Life of Pain Is Common for Many

Have you noticed some people's pain started much earlier or much later in life compared to this lifeline?

The People Likely Practicing GoodNESS

Where do we FEEL PAIN?

- nerve
- joint
- bone
- tendon
- muscle

Something injures us

- Body tells brain
- Brain interprets & creates pain signal
- Memories & patterns form
How do we **HEAL PAIN?**

- Red, hot, swollen, pain & loss of function.
- Injured area is reconnected and repaired.
- Restretched to original form & direction.
- Back to normal function!

But **WHY** does pain sometimes last longer?

**ACUTE**
- Heat
- Emotional
- Social
- Spiritual
- Vision
- Exercise
- Sleep
- Pain

**CHRONIC**

**Bad**
- Headache
- Knee pain
- Elbow pain
- Shoulder pain
- Hip pain

**ACUTE**
- Stress
- Bowel issues
- Poor posture
- Poor sleep
- Chaffing
- Too much sugar

**CHRONIC**
- Sleep
- Exercise
- Stress
- Bowel issues

Irritated Nerves Cause Pain

**How do we FEEL PAIN?**

- Pizza dough gets hole punched.
- Pizza guy sees the hole in the dough.
- Pizza guy's brain says, "Uh oh!"
- Brain reminds body, "Don't do that again."
<table>
<thead>
<tr>
<th>EXERCISE TYPE</th>
<th>CONSIDERATIONS</th>
<th>BEGINNER LOW INTENSITY</th>
<th>INTERMEDIATE MODERATE INTENSITY</th>
<th>ADVANCED VIGOROUS INTENSITY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STRENGTH/WEIGHT BEARING</strong></td>
<td>Proper form</td>
<td>Chair-based exercises w/light weights or resistance bands</td>
<td>All major muscle groups 8-12 reps/muscle group</td>
<td>All major muscle groups</td>
</tr>
<tr>
<td></td>
<td>Muscle recovery (48 hrs)</td>
<td>2x per week</td>
<td>Minimum 2x a week</td>
<td>Daily focus</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10-20 minutes</td>
<td>20-30 minutes</td>
<td>Minimum 3x per week</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(isometric better than weight bearing)</td>
<td></td>
<td>30-60 minutes</td>
</tr>
<tr>
<td><strong>FLEXIBILITY</strong></td>
<td>Joint laxity</td>
<td>Stretching to point of mild muscle tightness</td>
<td>Progress to maximum ROM (unassisted)</td>
<td>Assisted stretching to</td>
</tr>
<tr>
<td></td>
<td>Balance</td>
<td>Towel/strap assisted</td>
<td>2-3 days per week</td>
<td>complete ROM w/ qualified</td>
</tr>
<tr>
<td></td>
<td>Pain</td>
<td>2-3 days per week</td>
<td>20-30 minutes</td>
<td>trainer or physical therapist</td>
</tr>
<tr>
<td></td>
<td>Warm muscles</td>
<td>10-20 minutes</td>
<td></td>
<td>2-3 days per week</td>
</tr>
<tr>
<td><strong>BALANCE</strong></td>
<td>Neuro status</td>
<td>Assisted (chair/wall/person)</td>
<td>Progress towards standing unsupported on 1 leg for 20 seconds</td>
<td>Balance combined w/movement</td>
</tr>
<tr>
<td></td>
<td>Fall risk</td>
<td>5-10 minutes</td>
<td></td>
<td>equipment (Bosu)</td>
</tr>
<tr>
<td></td>
<td>Safe surroundings</td>
<td></td>
<td></td>
<td>Practice daily</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5-10 minutes</td>
</tr>
<tr>
<td><strong>CARDIOVASCULAR</strong></td>
<td>Balance</td>
<td>Walking supported on 1 leg for 20 seconds</td>
<td>Jogging/running</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pain</td>
<td>10-20 minutes</td>
<td>Biking &gt;10 mph</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CVD risk assess</td>
<td>Practice daily</td>
<td>Not able to carry a conversation 60 minutes per week</td>
<td></td>
</tr>
<tr>
<td><strong>MIND-BODY YOGA</strong></td>
<td>Joint laxity</td>
<td>Hatha and Vinyasa 2-3x per week</td>
<td>Vinyasa, Ashtanga</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Balance</td>
<td>30-60 minutes</td>
<td>2-3x per week</td>
<td>60 minutes</td>
</tr>
<tr>
<td><strong>ACTIVITIES OF DAILY LIVING</strong></td>
<td>Balance</td>
<td>Customizable with clinic</td>
<td>Reference concepts learned from group session</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fall risk</td>
<td>Reinforce plan of care</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CVD risk</td>
<td>Reference concepts learned</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Reference concepts learned**

- Name/logo
- Customizable with clinic
- Reinforce plan of care
- Reference concepts learned

**Reinforce plan of care**

- From group session
- Reference concepts learned

**Customizable with clinic**

- Name/logo
- Reinforce plan of care
- Reference concepts learned

**Reference concepts learned**

- Name/logo
- Customizable with clinic
- Reinforce plan of care
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- Name/logo
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**Reference concepts learned**

- Name/logo
- Customizable with clinic
- Reinforce plan of care

**Reference concepts learned**

- Name/logo
- Customizable with clinic
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<table>
<thead>
<tr>
<th>Concentrated Protein 3-4oz, 150 calories</th>
<th>Fats 40 calories</th>
<th>Unlimited Vegetables</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 whole eggs or 3 whites + 1 whole</td>
<td>Oils:</td>
<td>Artichokes</td>
</tr>
<tr>
<td>Egg Substitute (2/3 cup)</td>
<td>- Cold pressed,</td>
<td>Asparagus</td>
</tr>
<tr>
<td>Fish or shellfish</td>
<td>extra-virgin olive,</td>
<td>Bamboo shoots</td>
</tr>
<tr>
<td>Poultry: chicken, turkey, white meat</td>
<td>coconut, avocado oil (1 tsp)</td>
<td>Bean sprouts</td>
</tr>
<tr>
<td>Lamb: leg or lean roast</td>
<td>- Smart or Earth Balance (1½ tsp)</td>
<td>Bell Peppers</td>
</tr>
<tr>
<td>Beef: very lean</td>
<td>- ghee: clarified butter (1 tsp)</td>
<td>Broccoli</td>
</tr>
<tr>
<td>Pork: white meat</td>
<td>- Avocado (1/8)</td>
<td>Brussels sprouts</td>
</tr>
<tr>
<td>Wild Game: buffalo, venison, elk</td>
<td>- Olives (8-10 medium)</td>
<td>Cabbage</td>
</tr>
<tr>
<td>Tofu</td>
<td>- Coconut milk – light (3 Tbls)</td>
<td>Cauliflower</td>
</tr>
<tr>
<td>Soy or veggie burger</td>
<td></td>
<td>Celery</td>
</tr>
<tr>
<td>Cottage Cheese: 1%-2% (% cup)</td>
<td></td>
<td>Chives/Garlic</td>
</tr>
<tr>
<td>Parmesan (6 Tbls)</td>
<td></td>
<td>Cucumber</td>
</tr>
<tr>
<td>Semi-soft/hard cheese 1%-2% (1-2oz)</td>
<td></td>
<td>Eggplant</td>
</tr>
<tr>
<td>Greek Yogurt, plain unsweetened</td>
<td></td>
<td>Fennel</td>
</tr>
</tbody>
</table>

**Bolded oils have higher smoke point, thus are more stable for high temp cooking**

<table>
<thead>
<tr>
<th>Fruit 80 calories</th>
<th>Legumes 110 Calories</th>
<th>Grains (limit to 1 serving daily) 75-110 calories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple (1 medium)</td>
<td>Beans (½ cup):</td>
<td>Whole wheat bread (1 slice)*</td>
</tr>
<tr>
<td>Apricots (3 medium)</td>
<td>black, cannellini,</td>
<td>Whole wheat tortilla or pita (½)*</td>
</tr>
<tr>
<td>Berries:</td>
<td>garbanzo kidney,</td>
<td>Whole wheat pasta (½ cup)*</td>
</tr>
<tr>
<td>Blackberries/blueberries (1 cup)</td>
<td>lentil, lima, mung,</td>
<td>Ryvita or Wasa crackers (2 large)*</td>
</tr>
<tr>
<td>Raspberries/strawberries (1½ cups)</td>
<td>navy, green peas,</td>
<td>Barley (½ cup cooked)*</td>
</tr>
<tr>
<td>Cantaloupe (½ medium)</td>
<td>pinto, refried,</td>
<td>Bulgur cracked wheat (½ cup)*</td>
</tr>
<tr>
<td>Cherries (15)</td>
<td>soy (edamame)</td>
<td>Whole oats (½ cup cooked)</td>
</tr>
<tr>
<td>Figs (2)</td>
<td>Hummus (¼ cup)</td>
<td></td>
</tr>
<tr>
<td>Grapefruit (1 whole)</td>
<td>Bean soup (¾ cup)</td>
<td></td>
</tr>
<tr>
<td>Grapes (15)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Honeydew (¼ medium)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mango (½ medium)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orange (1 large)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peaches/nectarines (2 small)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pear (1 medium)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Persimmon (½ medium)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tangerines (2 small)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Dairy & Alternatives 80 Calories      |                      | Gluten Free Options:                         |
|---------------------------------------|                      | Buckwheat groats (½ cup)                     |
|                                       |                      | Rice, brown or wild (½ cup)                  |
|                                       |                      | Quinoa or quinoa pasta (½ cup)               |
|                                       |                      | Ryvita's gluten-free bread (1 slice)        |
|                                       |                      | * Depending on your condition your           |
|                                       |                      | practitioner may recommend avoiding         |
|                                       |                      | gluten-containing foods                      |

| Limited Vegetables 45 calories        |                      | Nuts & Seeds 100 calories                    |
|---------------------------------------|                      | Almonds, hazelnuts (12 whole)                |
|                                       |                      | Cashews (8 whole)                            |
|                                       |                      | Peanuts (18 whole)                           |
|                                       |                      | Walnuts, pecans (8 halves)                   |
|                                       |                      | Nut butter (1 Tbl)                           |
|                                       |                      | Chia Seeds, ground flax seeds                |
|                                       |                      | Other nuts/seeds - Pistachio, pumpkin,       |
|                                       |                      | sunflower, sesame, pinenuts                 |

**GoodNESS: Anti-Inflammatory Nutrition**
My GoodNESS Self-Evaluation & Strategy

Mental

Common thought patterns?
- Too many
- Too fast
- All over the place
- Too intense
- Confused or slow

Emotional

Common types of feelings?
- Worried or anxious
- Sad or blue
- Mad or irritable
- Joyful or giddy
- Peaceful or content

Nutrition

- Up my water
- Stop sugary drinks
- Limit sweets
- Avoid fake foods
- Up the veggies
- Up the fiber

Exercise

- Move once hourly
- Walk more often
- Yoga or stretching
- Core Strengthening
- Improve posture
- Strength training

Social

Fulfilling relationships in my life??
- Friends
- Family
- Pets
- Work
- [ ]

Spiritual

What gives sacred meaning to my life?
- God/spirituality
- Gratitude
- Service to others
- [ ]
- [ ]

Stress Management

- Meditate/pray
- Breathe (in 4, out 7)
- Avoid addictive substances (e.g. alcohol, cigarettes, Rx/illegal drugs)
- [ ]
- [ ]

Sleep

- Avoid caffeine after lunch
- Avoid electronics & eating 3 hours before bedtime
- Create a bedtime ritual you love
- [ ]

Other Beneficial Things I Am Learning Today That I Want To Implement:

The 3 C’s of Life: You must make the **Choice** to take the **Chance** if you want anything in life to **Change**.
Patient Name: ___________________ Age: _______ Date of visit: ___________________

Group Visit Presenter: ____________________________________________________________

Please rate the value of today's Group Visit (1=low/10=high): 1 2 3 4 5 6 7 8 9 10

What are the 3 most important things you learned or changes you plan to make from today's Group Visit?

1. ____________________________________________
2. ____________________________________________
3. ____________________________________________

Suggestions for Improvement: ________________________________________
________________________________________________________________________
________________________________________________________________________

Optional Testimonial:

We are seeking support to help other patients understand the benefits of the Group Visit model. Please tell us why you think other patients should attend a Group Visit.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

(initial) I, ________________________________, give permission to ________________________________ to use my testimonial (using initials, age and hometown only) to help other patients understand the benefits of Group Visits and our practice.

---

Patient Feedback Form

✓ Patient feedback allows you to improve your Group Visit experience
✓ Collect Testimonials to help you promote the Group Visit experience with other patients
✓ Gives you important items the patient plans to change so you can hold them accountable
This toolkit educates patients on the lifecycle of pain, where and how we feel pain, and why pain persists and doesn’t resolve for many. By exploring the underlying factors causing pain, patients will recognize patterns and long-term effects of unhealthy behaviors. Understanding the pitfalls of medication dependency and how poor nutrition, lack of exercise, high stress and inadequate sleep all contribute to poor healing and chronic pain, patients will embrace lifestyle choices that create lifelong, optimal health and chronic pain prevention.

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