

GROUP VISIT TOOLKIT

The Secret to WellBEing



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 toolkit helps educate patients how to build and maintain metabolic reserve. Patients are often caught in a cycle of disease crisis, in which they are grappling with persistent symptoms and flare-ups of chronic illness. Rather than manage their symptoms with prescriptions and traditional medicine alone, we can implement targeted lifestyle measures to help patients increase their metabolic reserve, disease resistance and overall wellbeing. This not only reduces the impact of their health concerns and risks at the moment, but also improves their quality of life for years to come.

Use for patients with these issues:

- Fatigue or sleep issues
- Weight concerns
- Blood sugar/insulin imbalances
- Heart disease/stroke risk
- Cancer risk
- Digestive disorders
- Hormone imbalances
- Autoimmunity/allergy issues
- Mental health concerns

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.



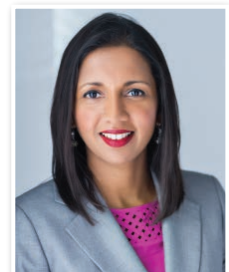
Multi-Media Education:

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, Osher Center for Integrative Medicine at the University of Miami Miller School of Medicine, the Metabolic Medical Institute at George Washington University. She also serves as the Clinical Expert at the Lifestyle Matrix Resource Center 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*.





The Secret to WellBEing

Patient Name: _____ **Date of visit:** _____

CC: Fatigue Weight concerns

Associated Chronic Issue(s): 1. _____ 2. _____

_____ (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, 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.

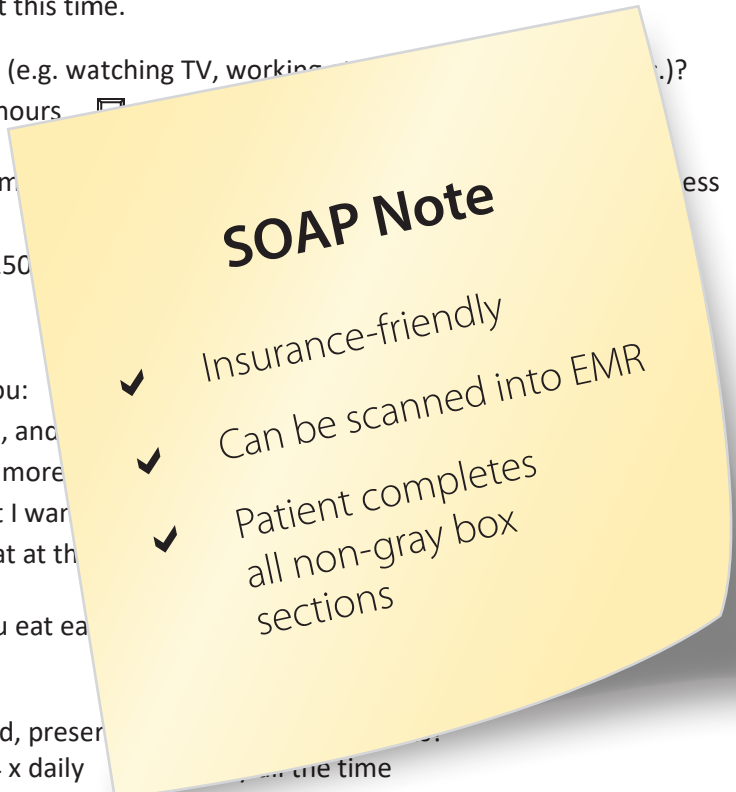
History of Present Illness:

Part I: Physical

- Please select the one choice that best describes you:
 - I'm physically active already and am happy with my progress.
 - I am ready to become more active, but I would like some help.
 - I am not ready to be more active, but would want to know if being more active would help my issues.
 - I am not interested in being more active.
 - I am physically unable to be more active at this time.
- How many hours each day do you spending sitting (e.g. watching TV, working, etc.)?
 - less than 1 hour
 - 1-2 hours
 - 2-4 hours
 - 4-6 hours
 - 6-8 hours
 - 8-10 hours
- How many minutes per week do you spend doing moderate to vigorous physical activity (e.g. walking, swimming, gardening, etc.)?
 - less than 30 min
 - 30-90 min
 - 90-150 min
 - 150-300 min
 - 300-450 min
 - 450-900 min

Part II: Nutritional

- Please select the one choice that best describes you:
 - I eat lots of fruits, veggies, healthy protein, and whole grains.
 - I am ready to eat healthier and would like more help.
 - I may not be ready to be eat healthier, but I want to know if it would help my issues.
 - I'm not interested in changing the way I eat at this time.
- How many servings of fruits and vegetables do you eat each day?
 - 2 or less
 - 3-5
 - 6-9
 - 10 or more
- How often do you eat foods that contain processed, preservatives, or artificial ingredients?
 - rarely or never
 - once daily
 - 2-4 x daily
 - mostly all the time
- How often to you drink fluids that contain sugar (including alcohol) or artificial ingredients?
 - rarely or never
 - once daily
 - 2-4 x daily
 - mostly all the time



Review of Systems: (check all that apply)

- snoring general malaise feeling joint pain trouble falling asleep trouble staying asleep
- high stress depressed anxiousness weight gain (past 3 mos): ___ # regular headaches

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GVT-9 The Secret to WellBEing-version 1.0

ASSESSMENT (to be completed by office): Fatigue Abnormal BMI

Associated Chronic Disease(s) or Symptoms:

EXAM (to be completed by office):

- o Vitals: Wt: _____ Ht: _____ BMI: _____ BP: _____ Pulse: _____ WC: _____ WHR: _____
- o CV: RRR; no M/G/R Edema: Yes / No Skin: warm/dry/intact Abnl: _____
- o Respiratory: CTA B Abnl: _____ Respiratory Effort: WNL Labored
- o Other _____

PLAN OF CARE (to be completed by office):

- | | |
|--|--|
| <ul style="list-style-type: none"><input checked="" type="checkbox"/> Reviewed principles of metabolic reserves and physiological resilience<input checked="" type="checkbox"/> Educated on nutritional, physical, emotional and environmental pillars of optimizing WellBEing<input checked="" type="checkbox"/> Encouraged a personalized plant-based, whole foods diet<input checked="" type="checkbox"/> Educated and encouraged NEAT hourly<input checked="" type="checkbox"/> Advised to reduce common environmental toxic exposures<input checked="" type="checkbox"/> Educated on sleep goals & impact of stress on the physical body | <ul style="list-style-type: none"><input type="checkbox"/> Return to clinic in _____ days/ weeks/ months/ as needed<input type="checkbox"/> Provider to be seen: _____<input type="checkbox"/> Reason for visit: _____<input type="checkbox"/> Other: _____ |
|--|--|

Each person has his or her own special reason for having more WellBEing vs. DISEase in daily life. Whether you've been recently diagnosed with a medical condition, want to keep up with your children/grandchildren or are just sick and tired of not feeling like 'your old self', making the choice to improve your health is a goal to be celebrated.

It is known patients with a clear understanding of what they deeply desire are the ones who succeed most often. Consider evaluating what will inspire and propel you forward hereafter by documenting them below:

1. Take a moment to reflect upon why it is important to YOU to compress your morbidity and have more WellBEing?

2. Take a moment to reflect upon what specific positive impact(s) WellBEing will have on others in your life?

The Secret to WellBEing



Event Flyer

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

Join us to learn how you can not only live well, but flourish.

LOGO AREA

**We'll help you build a life of lasting wellbeing.
Register for our upcoming patient Group Visit!**

Date/Time/Location



1



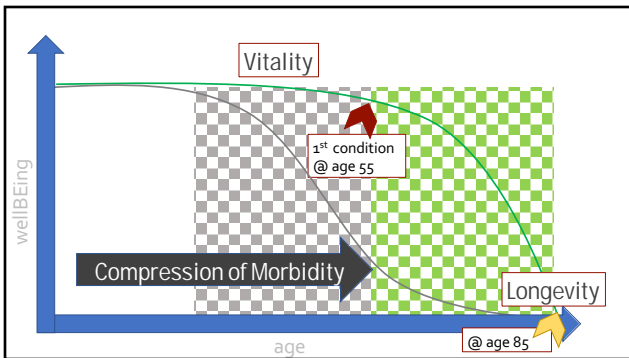
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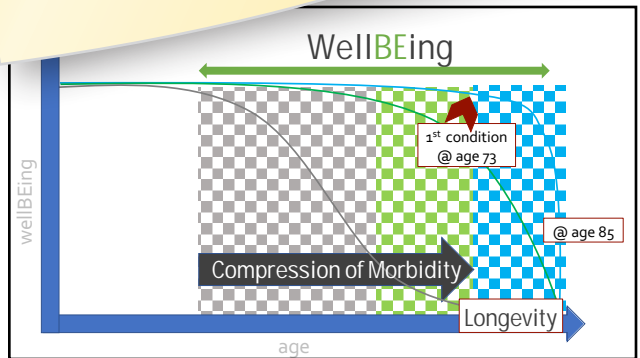
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PowerPoint Slides

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



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WellBEing

A state of physical, mental and spiritual health that can support your ability to live, flourish and grow



7

WellBEing

A state of physical, mental and spiritual health that can support your ability to live, flourish and grow



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DISease

NOT flourishing and growing physically.

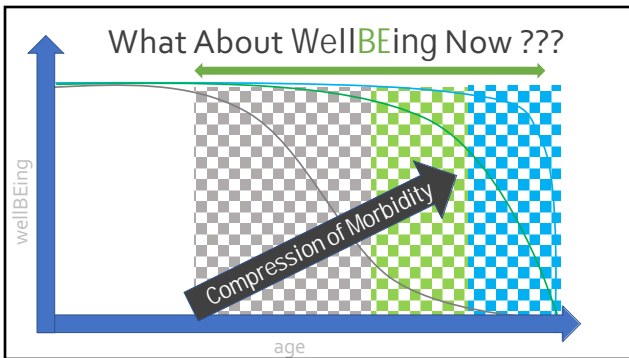
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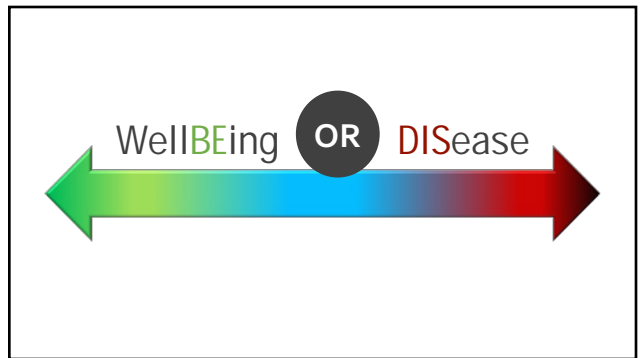
DISease

NOT flourishing and growing mentally and emotionally

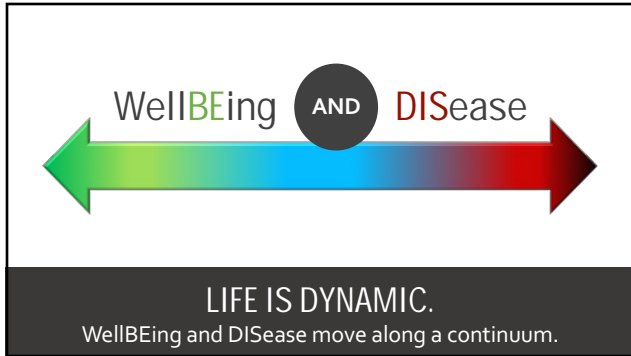
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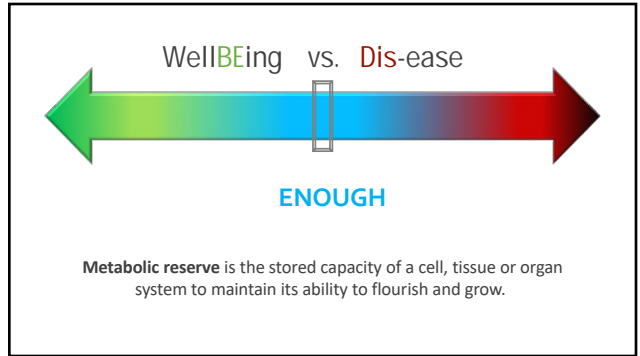
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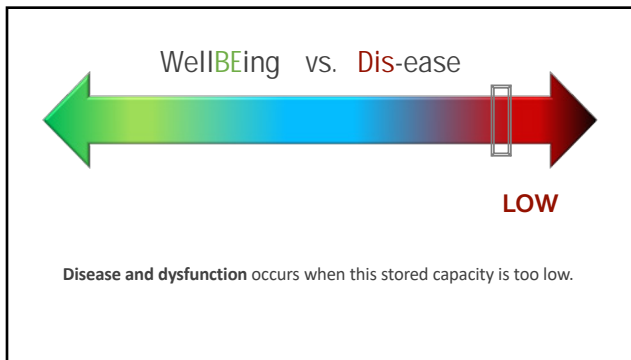
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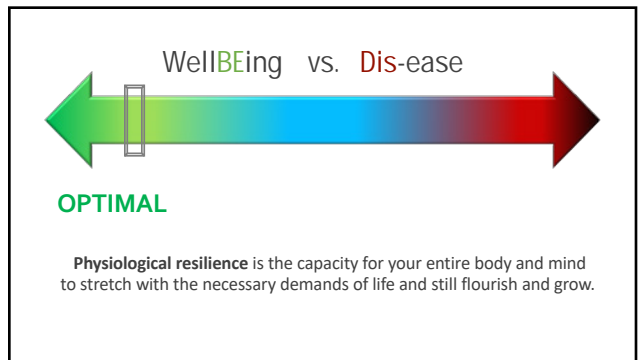
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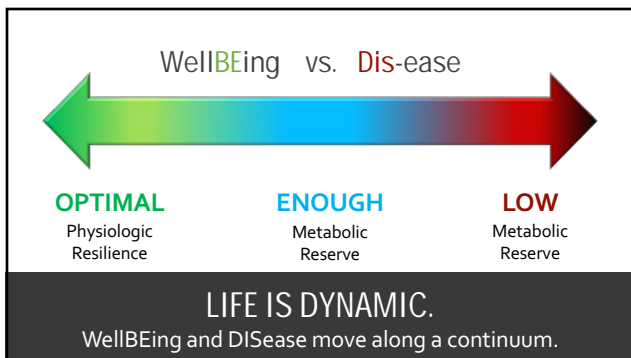
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The Secret to WellBEing

1. Nutritional
2. Physical
3. Emotional
4. Environmental



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The Secret to WellBEing

1. Nutritional
2. Physical
3. Emotional
4. Environmental



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Experts AGREE on these guidelines:

- Sugar is bad.
- Man food is riskier than Earth food.
- Personalized food plans work best.
- Plant food is the essential foundation.

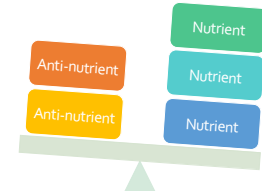


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DISease

When diet is wrong, medicine is of no use.


WellBEing



When diet is correct, medicine is of no need.

Ayurvedic Proverb

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Carbohydrates

Minerals


Proteins

Vitamins

Fats

Phytonutrients

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Mediterranean Diet

Minerals

Fats

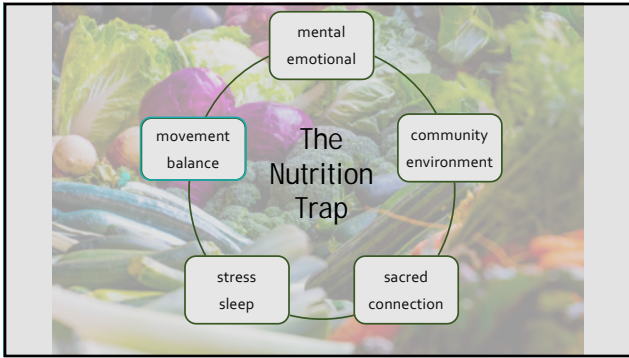
Vitamins

Proteins

Phytonutrients

Carbohydrates

24



25

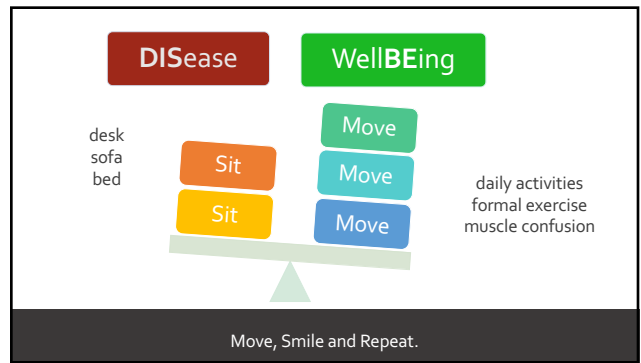
The Secret to WellBEing

1. Nutritional
2. **Physical**
3. Emotional
4. Environmental

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- ### Create NEAT solutions in life:
- Alarm clock every waking hour to get up
 - Stairs, parking lots and chores
 - Office design, standing desks & walking meetings
 - Dancing, landscaping and home makeovers

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Experts AGREE on these benefits:

- Reduces inflammation & autoimmunity risks
- Improves insulin, weight & metabolism
- Increases energy potential of the body
- Makes a brain healthy, wealthy & wise

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The Exercise Trap

Doing only 1 or 2 of the complete **4 part** solution

Stretch

Balance

Aerobic

Strength

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OVERHEAD SQUAT TEST

front

side

back

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TIMED UP AND GO (TUG) TEST

1. Begin by sitting in a chair with armrests fully with back against the back of the chair.
2. Walk 3 meters and back to the chair and sit back with your back against the back of the chair again.
3. Time from the word "Go" until you are back in the chair correctly.

60's: 8 secs
70's: 9 secs
80-99: 11 secs

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1. Nutritional
2. Physical
3. **Emotional**
4. Environmental

The Secret to WellBEing

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How do we FEEL STRESS?

- 80 % of all primary care visits are related to stress
- 44% of US stress levels have increased over past 5 years
- 86% of children state that parental stress affects them
- Over 50% of Americans worry about family matters

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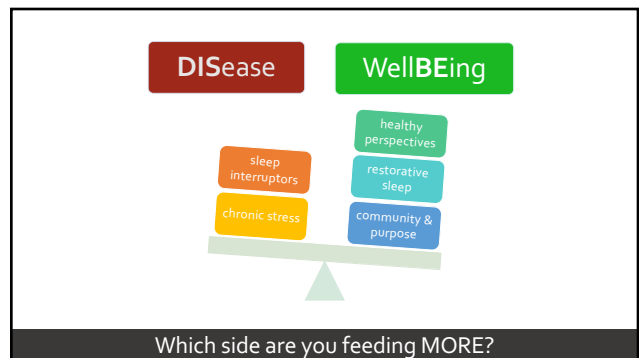
Experts AGREE on these truths:

- Loneliness can shave 8 years off your life.
- Humans are social & need community to live.
- People need a purpose to wake up everyday.
- There's no one magic secret. Do some of all of it.

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How do we SLEEP ?

- 50-70 million American adults have a sleep disorder
- Almost 50% of Americans snore
- 38% fall asleep during the day
- 35% of adults get less than 7 hours of sleep every day

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REQUIRED SLEEP

- Adults: 7-9 hrs
- Teenagers: 8-10 hrs
- Age 6-12: 9-12 hrs
- Age 2-6: 10-14 hrs
- Infants: 12-16 hrs

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1. Nutritional
2. Physical
3. Emotional
4. Environmental

The Secret to WellBEing

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clean inputs

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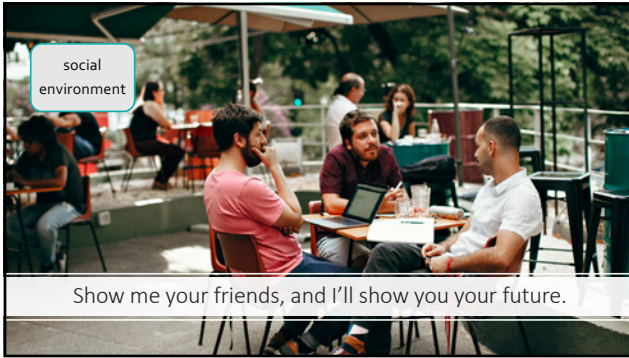


physical environment

JUST TO NAME A FEW

- **Bisphenol A:** Plastic bottles and inner can linings, chronic xenoestrogen exposure
- **Dioxin:** Found in meat and surface water
- **Mercury:** Fish and mercury dental fillings
- **Perfluorinated chemicals:** Non-stick cooking and baking pans
- **Atrazine:** Pesticides found in drinking water
- **Organophosphates:** pesticides found in baby food
- **Glycol ethers:** cleaning products, liquid soaps and cosmetics
- **Phthalates:** Plastic containers, cosmetics, toothbrushes, lotions and cosmetics
- **Arsenic:** Rice and some drinking water
- **Fire retardants:** found in furniture, car seats, changing table pads
- **Lead:** found in water and lead based paints
- **Mold:** Damp home or workplace
- **Glyphosate:** Herbicide in farming

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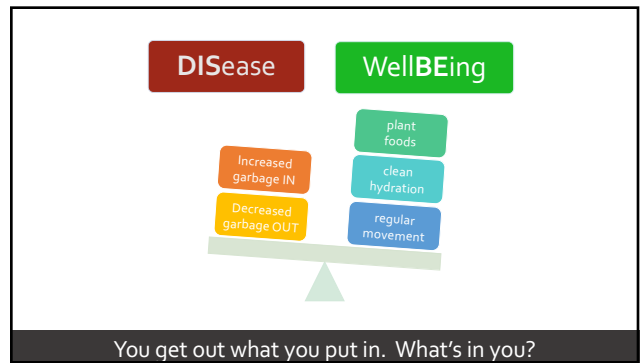
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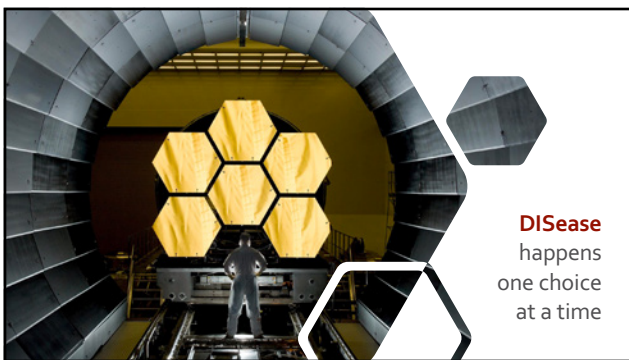
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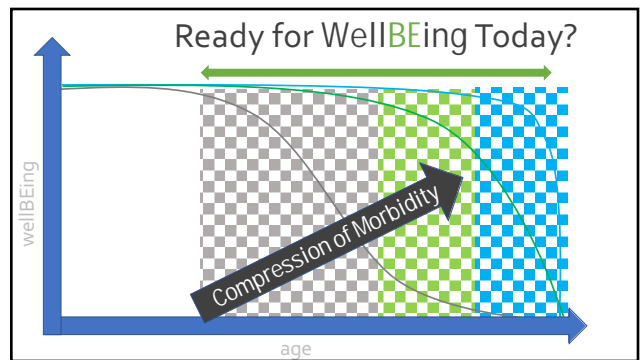
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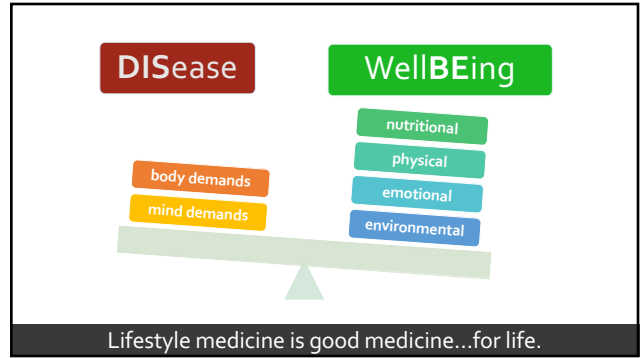
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Nutritional Wellbeing

[Insert Logo Here]



The Mediterranean Dietary Pattern vs. The Standard American Dietary Pattern

MEDITERRANEAN DIETARY PRINCIPLES

- Complex carbs in context with fiber
- Sugar slowly enters bloodstream
- Hello, fat burning!
- Blood sugar levels are balanced
- You feel satisfied after your meal
- You crush the day!

High in Healthy Fats, Nuts, Seeds, Herbs and Spices Nutrient-Rich, Calorie-Balanced, Diverse



Meats and sweets (*less often*)

Poultry, eggs, cheese, and yogurt (*moderate portions, daily to weekly*)

Patient Handouts

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

STANDARD AMERICAN DIET DIETARY PRINCIPLES

- Carb euphoria
- Sugar rapidly enters bloodstream
- Sugar gets stored in the cells
- Hello, fat storing!
- Blood sugar levels rapidly drop
- You crave more refined carbs

High in Sodium, Sugar and Unhealthy Fats, Processed Foods, Calorie-Rich, Nutrient-Poor



Dairy, vegetables, beverages

Processed snacks and sweets, refined grains, pizza, burgers and pasta



Physical inactivity and isolation

Physical Wellbeing

[Insert Logo Here]



Physical Activity

As the saying goes, movement is life. Without the wind, many vegetables do not get pollinated. Bees must move to pollinate fruit. Your body is nourished by blood moving through your vessels. Movement is vital for cellular activity, which in turn, helps organ tissues function optimally. Sensible movement is medicine—it helps reduce obesity and blood pressure while improving bone health and cardiovascular fitness. But there are other important effects as well.



Effects of regular physical activity on the body

Reduces global inflammation

Reduces incidence of autoimmune disease

Increases serotonin production

Improve oxygen delivery to your cells and organs

Reduces the production of obesity related hormones

Improves insulin sensitivity

4 Categories of Physical Activity

AEROBIC

Walking | Cycling | Elliptical | Zumba

STRETCHING

Basic stretching | Deep breathing | Pilates

BALANCING

Single-leg | Heel-to-toe | Core/ball exercises

STRENGTH TRAINING

Weightlifting | Dynamic | Pilates | Circuit



Environmental Wellbeing



The Dirty Dozen and Clean Fifteen

Our food supply falls victim to environmental toxins. Pesticides are applied to fight off bugs of all kinds. Once thought to be benign to humans, they are now known to cause a variety of problems from allergies to cancer. We ingest residues from these chemicals every day, and they can build up in our bodies over time. The Dirty Dozen represents produce that are more permeable and therefore more susceptible to absorbing the chemicals in which they're sprayed with. It's best to purchase these as organic if possible. The Clean Fifteen represents foods that are less permeable and not as susceptible to absorbing chemicals and are safer to consume if not organic.

Dirty Dozen

1. Strawberries



5. Apples



9. Pears



2. Spinach



6. Grapes



10. Tomatoes



3. Kale



7. Peaches



11. Celery



4. Nectarines



8. Cherries



12. Potatoes



Clean Fifteen

1. Avocados



6. Papayas



11. Cauliflower



2. Sweet Corn



7. Eggplant



12. Cantaloupes



3. Pineapple



8. Asparagus



13. Broccoli



4. Frozen Sweet Peas



9. Kiwis



14. Mushrooms



5. Onion



10. Cabbages



15. Honeydew Melons



Here are just a few of the environmental toxins that the body must work hard to eliminate.

Toxin	Source
Bisphenol A	Plastic bottles and inner can linings
Dioxin	Meat and surface water
Mercury	Fish and mercury dental fillings
Perfluorinated chemicals	Non-stick cookware and baking pans
Atrazine	Pesticides found in drinking water
Organophosphates	Pesticides found in baby food
Glycol ethers	Cleaning products, liquid soaps and cosmetics
Phthalates	Plastic containers, cosmetics, toothbrushes, lotions and cosmetics
Arsenic	Rice and some drinking water
Fire retardants	Furniture, car seats, changing table pads
Lead	Water and lead-based paints
Mold	Damp home or workplace
Glyphosate	Herbicide in farming

Each year the Environmental Working Group publishes an annual list of produce with the most pesticides. Be sure to check www.ewg.org for the most up-to-date list.

Emotional Wellbeing

[Insert Logo Here]



Sleep

Sleep and stress are intimately connected. Perceived stress can cause disruptions in your normal sleep patterns, and poor sleep increases daily stress. During sleep, you recharge your brain and the cells in your body grow and repair. Poor sleep can amplify the effects of various conditions such as cardiovascular disease, obesity, respiratory disease, and chronic pain.



Sleep Hygiene Habits

Limit naps to 30 minutes early in the day or not at all

Limit 10 minutes of aerobic exercises in the morning or early afternoon

Avoid fatty, spicy, rich foods as well as citrus fruit, caffeine, and carbonated drinks in the afternoon/evening

Cool temperatures, 60-68°F, are best for sleep

Wear blue light-blocking glasses when using electronics

Avoid cell phones, laptop and other personal information devices before bedtime or use blue light-blocking apps

Try using white noise, such as fans, or sound apps on your phone

Do not watch the clock when trying to sleep; trust your alarm clock

Get outside for natural light daily if possible, even on cool and cloudy days

Keep a consistent sleep schedule, even on the weekends



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

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