

# Immune

F O U N D A T I O N S

## Clinical Implementation Guide

**STEP 1**

Patient completes the Immune Foundations Questionnaire to highlight initial steps for treatment.



**STEP 2**

A. Clinician uses Immune Development Timeline, Mitochondrial and Gut-Immune Health presentation pads to illustrate factors affecting immune function throughout the lifecycle.



B. Clinician and patient review the questionnaire to identify key area(s) of focus to initiate treatment:

**Immune FOUNDATIONS**

Patient Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Questionnaire

Understanding key contributors to immune health will help identify the best course of action for recovery of immune function. After reviewing this questionnaire with your health care provider, please refer to the Immune Foundations Patient Handbook for dietary, lifestyle and nutrient therapy recommendations.

**Please list your top 3 major health concerns in order of importance:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

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**Overall Immune & Inflammatory Balance**

- Do you tend to catch cold easily or recover slowly from illness? Y N
- Have you been diagnosed with a recent or chronic infection (such as Lyme disease, Epstein-Barr, Candidiasis, herpes simplex)? Y N
- Do you suffer from chronic fatigue, chronic pain, fibromyalgia or migraine headaches? Y N
- Do you have unexplained rashes, redness or itching? Y N

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**Diet & Lifestyle**

- Do you eat at least five servings of fruits and vegetables per day? Y N
- Do you regularly eat at restaurants or consume prepared foods from the grocery store? Y N
- Do you exercise at least five days per week? Y N
- Do you have any known allergies or sensitivities to foods or medications? Y N

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**Gastrointestinal Health**

- Do you regularly have less than one or more than three bowel movements per day? Y N
- Do you experience frequent heartburn, burping, gas or bloating? Y N
- Have you used antibiotic medications within the past two years? Y N
- Do you consume alcohol, antacids or anti-inflammatory/pain killer drugs regularly? Y N

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**Stress**

- Do you feel less able to handle stress or experience more stress now than in the past? Y N
- Do you experience mental foginess or have trouble concentrating? Y N
- Do you have trouble falling or staying asleep? Y N
- Do you wake feeling unrested or depend on caffeine to keep yourself going throughout the day? Y N

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**Environmental & Toxic Exposures**

- Do you have regular exposure to exhaust fumes, tobacco smoke, pesticides, commercial chemicals, paint, cleaning chemicals or volatile fumes? Y N
- Have you lived in a house or worked in an office environment with a history of water damage or known mold? Y N
- Are you sensitive to smells or fragrances? Y N
- Do you have seasonal allergies, asthma or an autoimmune disease? Y N

**Testing:** Nutrient status; mitochondrial function/organic acids; thyroid panel or other diagnostic tests as needed  
**Diet & Supplementation:** Whole-foods diet; broad-spectrum support such as beta-glucans, fish oil, and vitamin D as needed

**Testing:** Nutrient status; food sensitivities  
**Diet & Supplementation:** Elimination diet; foundation nutrition such as fish oil, probiotics, broad-spectrum multi-vitamin and vitamin D as needed

**Testing:** Comprehensive stool analysis; lactulose/mannitol assay; breath hydrogen  
**Diet & Supplementation:** Low FODMAP or whole-foods diet; probiotics, colostrum/immunoglobulin concentrate, L-glutamine

**Testing:** 4-Point cortisol rhythm and DHEA; complete hormone panel  
**Diet & Supplementation:** Address blood sugar regulation; utilize adaptogenic herbs or botanical sleep aids as needed

**Testing:** Heavy metals; toxic element exposure  
**Diet & Supplementation:** 7+ day detoxification program; buffered vitamin C, colostrum/immunoglobulin concentrate

**STEP****3**

A. Patient receives the Immune Foundations Patient Handbook to review prior to the next visit.



B. Patient is supplied with any necessary testing kits, initial immune support supplements, and is encouraged to initiate positive lifestyle changes.



### Immune Foundations Patient Education Video

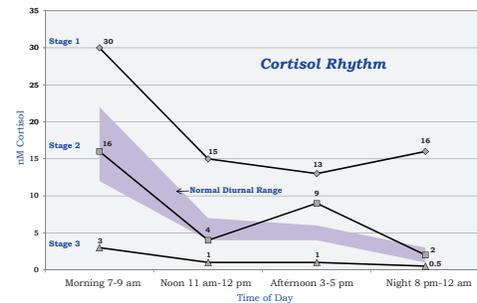
The Immune Foundations patient education video can be used as an outreach tool for both new and existing patients. This video can be utilized to introduce key concepts to new patients or as a follow-up to the first visit to review important discussion points.

**STEP****4**

Review pertinent test results and diagnosis. Initiate targeted therapies based on results.

#### Examples:

- Nutrient evaluation reveals low essential fatty acid and antioxidant status. Recommend targeted nutrient therapies and dietary modification to correct deficiencies.
- Stool analysis reveals dysbiosis and symptoms are suggestive of leaky gut. Initiate microbial balancing and gut healing protocol with an elimination or other therapeutic diet.
- 4-Point cortisol rhythm reveals hypo-cortisol pattern. Initiate hormone balancing protocol with sleep hygiene and stress reduction practices.



Follow-Up Visit (2-3 Weeks)

**STEP****5**

At this time, enroll patients in the **Essentials for Immune Health** Group Visit. **SEE THE FOLLOWING PAGE FOR MORE DETAILS**

STEP

6

In 3-4 months, clinician can assess the patient to track progress and adjust treatment plan as necessary. Treatment focus may transition to another foundational area of immune health at this time.



Diet & Lifestyle



Gastrointestinal Health



Toxins & Environment



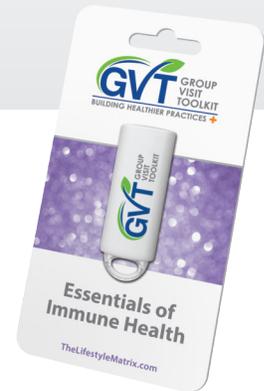
Stress Management

Follow-Up Visit (12+ Weeks)



## TRANSFORMING MEDICINE WITH GROUP VISITS

During the initial phase of care, implementing lasting lifestyle changes is essential for improvement of patient health outcomes. Group Visits are a great way to reinforce healthy lifestyle habits and keep patients motivated and accountable prior to one-on-one reassessments. In addition, Group Visits are an effective tool to create better practice efficiencies both financially and clinically. We recommend using the *Essentials for Immune Health* Group Visit Toolkit. You can find this and other Group Visit Toolkit resources at [TheLifestyleMatrix.com](http://TheLifestyleMatrix.com)



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