

THE AYURVEDIC INSTITUTE'S CENTER FOR HEALING, LIFE AND LONGEVITY

Ayurvedic Consultation Intake Packet

Welcome and thank you for choosing to visit the Ayurvedic Institute's Center for Healing, Life and Longevity!

Here you will find practitioners who care deeply about your well-being. According to Vasant Lad, each person is a living book; that is, the pages of each individual's life tell a beautiful and powerful story. Although others may experience similar situations, the ways that they are manifesting in you are related to your own unique psycho-physiological constitution. With this in mind, we look forward to listening to your concerns and goals so that we may create a plan for improved health together.

Please complete the attached Patient Information Document and Health Information History forms. All areas indicated on the patient information document must be initialed, as your file follows you within our clinic. You may keep this cover letter and General Information pages for your records.

Intake forms should be returned to the clinic at least 48 hours before your scheduled appointment. We also have a 48 hour cancellation policy; if you need to cancel your appointment we kindly ask for 48 hours notice. If you do not arrive for your scheduled appointment or cancel less than 48 hour prior to your scheduled appointment time, you will be billed the full cost of the appointment.

If you have any questions, please know that you are welcome to contact us by phone or by email at any time. Additionally, there is information about The Ayurvedic Institute's services and resources online at www.ayurveda.com.

We look forward to being a part of your health and wellness journey!

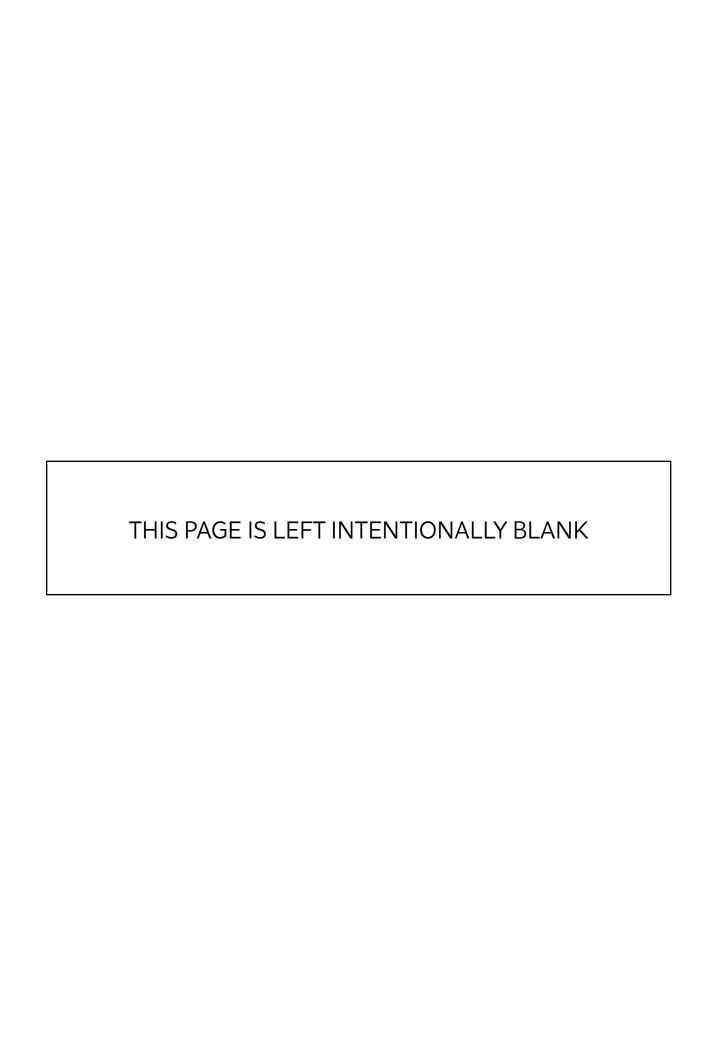
The Ayurvedic Institute's Center for Healing, Life, and Longevity

11401 Menaul Blvd NE, Albuquerque, NM 87112 Phone: 1 (505) 291-9698 x131 Fax Number: 1 (505) 294-7572

Email: <u>clinic@ayurveda.com</u>

FOR THOSE WHO ARE COMPLETING THIS FORM DIGITALLY:

If you are completing this form digitally, please "save as" to your computer first, then open the saved version to complete your paperwork. Additionally, please fill out the Health Information forms in full <u>BEFORE</u> signing the Patient Information Document. Digital signing of the document should be your <u>last step</u>, as once it is signed digitally you may be unable to edit further. After you have fully completed and signed your paperwork, please save and send it to <u>clinic@ayurveda.com</u>.



Patient Information Document

General Information

The Ayurvedic Institute | 11311 Menaul Blvd NE, Albuquerque NM 87112 | Phone: 1(505)291-9698
The Ayurvedic Institute is a non-profit 501(c)(3) educational organization that teaches the principles and practices of Ayurveda.

Ayurveda is currently considered a form of complimentary and alternative medicine in the United States. It is not licensed by the state of New Mexico as a medical discipline or practice. All services and treatments provided are complementary or alternative to health care services provided by health care practitioners currently licensed by the state of New Mexico. Ayurveda is complementary to and supportive of traditional western medicine as practiced in the United States and does not replace medical diagnosis and treatment.

You have the right to complete and current information concerning the complementary and alternative health care practitioner's assessment and recommended complimentary and alternative health care services that are to be provided prior to commencement of service(s) for each appointment including: the expected duration of the complementary and alternative health care services to be provided.

The Nature and Expected Results of an Ayurvedic Consultation provided by the Ayurvedic Institute:

Ayurveda is an ancient system of health that focuses on the complete person which includes the body, mind and spirit. Ayurveda defines wellness not as "the absence of disease", but when all body tissues, organs, systems, and functions are acting together in a balanced way and are able to maintain health and wellness in spite of potential illness causing influences. People are more vulnerable to disease when vital energies of the mind, body, and spirit are out of balance. Ayurveda believes that by balancing the various mind-body functions, the natural intelligence of the body will automatically bring itself to wellness over time.

Ayurveda recognizes that each person has a unique mind-body constitution. The Ayurvedic consultation process identifies the various components of an individual's mind-body constitution, determines where any imbalances may exist, and provides education, guidance, and options for helping the individual to nourish, stimulate, and balance vital energy to bring about their own improvements in health and wellness. It is an individual's correct implementation of the right Ayurvedic practices that bring about improved health and wellness.

Your Consultation:

The Ayurvedic Institute works with you through a collaborative process to develop an understanding between you and the Ayurvedic Institute regarding:

- · What the Ayurvedic Institute can and cannot do to contribute toward the achievement of your health and wellness objectives
- · What you, the patient, are willing and able to do to contribute toward the achievement of your health and wellness objectives
- How we can cooperate together to assist you in activating your plan to achieve your health and wellness objectives

An Ayurvedic Consultation typically consists of three general steps:

- 1. <u>Assessment</u> This includes a determination of your basic Ayurvedic constitution and your current condition and imbalances, a discussion of your concerns and reason for your visit, and jointly exploring your health history and past treatment results.
- 2. <u>Findings</u> The practitioner will analyze the assessment results and compile information to be reviewed with you to be used in a collaborative process to plan your health improvement program.
- 3. Recommendations The practitioner will offer recommendations based on your health concerns and goals, your current condition, and what the practitioner thinks is best for you. This is tailored to your unique needs with the intention of assisting you to shift from your current state of imbalance toward your optimum balance. This may include information and instruction on diet and eating habits, lifestyle, yoga, exercise, meditation, breathing practices, and other health improvement practices, as appropriate. Then together, you and the practitioner will establish a workable program you can implement to achieve your short-term and long-term health improvement goals.

Services Not Offered or Available:

The Ayurvedic Institute and its practitioners will not: perform surgery on an individual, set fractures on an individual, administer x-ray radiation to an individual, prescribe or dispense dangerous drugs or controlled substances to an individual, directly manipulate the joints or spine of an individual, physically invade the body except for the use of non-prescription topical creams, oils, salves, ointments, tinctures or any other preparations that may penetrate the skin without causing harm, make a recommendation to discontinue current medical treatment prescribed by a licensed health care practitioner, make a specific conventional medical diagnosis, have sexual contact with a current patient or former patient within one year of rendering service, falsely advertise or provide false information in documents described in this document, illegally use dangerous drugs or controlled substances, reveal confidential information of a patient without the patient's written consent, engage in fee splitting or kickbacks for referrals, refer to the practitioner's self as a licensed doctor or physician or other occupational title pursuant to Chapter 61 NMSA 1978; or perform massage therapy on an individual pursuant to the New Mexico Massage Therapy Practice Act.

Patient Information Document

General Information (continued)

NOTICE REGARDING PATIENT RECORDS:

- You have the right to access your own patient records and the written information therein.
- Patient records and transactions are confidential unless the release of these records is authorized in writing by the patient or as required by law.
- You have the right to a coordinated transfer when there is a change in the provider of the complementary and alternative health care services.

COMPLAINTS:

A patient may file a complaint against any complementary and alternative health care practitioner with the New Mexico Department of Regulation and Licensing:

New Mexico Regulation and Licensing Department ATTN: Superintendent's Office

Toney Anaya Building, 2550 Cerrillos Road, Santa Fe, New Mexico 87505 Phone: (505) 476-4500, Fax: (505) 476-4511

CLINIC FEES

In order to keep our clinic as accessible as possible, we offer two types of consultations, each on a sliding scale. Patients have the opportunity to choose within the scale for the appropriate consultation type how much they wish to pay for the appointment. Payment is due in full at the time of the services rendered. Payment may be made by cash, check, VISA, or MasterCard. The Ayurvedic Institute does not accept health insurance. The stated fee is for the specified services only and does not include any other services or products. There may be additional charges and fees for any additional services or products. Patients have the right to reasonable notice of changes in services and/or chargers for services.

CANCELLATION POLICY

The Ayurvedic Center for Healing, Life and Longevity has a 48 hour cancellation policy. If a patient must cancel an appointment, they are required to do so at least 48 hour prior to the scheduled appointment time. Any cancellations not received at least 48 hours prior to the scheduled appointment, as well as any patient who does not arrive for their scheduled appointment, will be charged the full clinic fee associated.

SUPERVISOR/PRACTITIONER CREDENTIALS

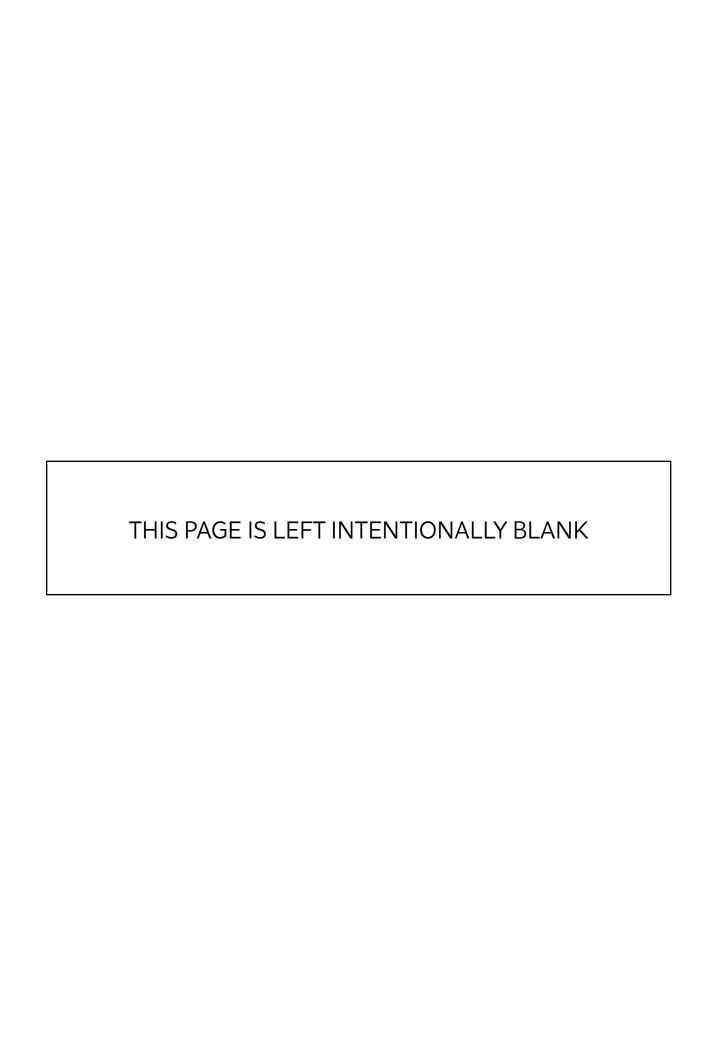
Ayurvedic Practitioners (AP) at The Ayurvedic Institute are complementary and alternative healthcare providers and are not licensed by the State of New Mexico. Please refer to the attached Practitioner Information Sheet.

PRACTITIONER INFORMATION SHEET	QUALIFYING EDUCATION AND EXPERIENCE
Vasant Lad, BAM&S, M.A.Sc.	Vasant Lad is the founder of the Ayurvedic Institute. He has a degree in Ayurvedic Medicine and Surgery (BAM&S), a Master's of Science in Ayurveda, and has been conducting Ayurvedic Consultations since 1972.
Pranav Lad, MD, ND	Pranav is not a licensed medical doctor in the state of New Mexico, nor is he practicing in that capacity in New Mexico.
Sandra Aumiller, AP	
Umā Jolicoeur, AP	Ayurvedic Practitioners have completed a minimum of 1160 hours of Ayurvedic Studies in the Ayurvedic Institute's Level 1 and Level 2 Programs (or equivalent).
Shannon Kelly, AP	Ayurvedic Practitioners have a minimum of 100 hours experience working directly
Mitesh Raichada, AP	with patients, and are current faculty members of the Ayurvedic Studies Programs here at the Ayurvedic Institute.
Sneha Raichada, MPT, E-RYT 200, AP	Collectively, these practitioners and supervisors have over 40 years experience
David Yoss, AP	working directly with patients.

Patient Information Document

Application For Services

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New Returning
Returning Patients only: If you have completed the Health History packet in the last year and there have been no changes to the information provided
(Initial) I certify that there have been no changes to the Health Information and History forms I have previously completed
 Consultation Services Offered to me by the Ayurvedic Institute: Determine my mind-body constitution to identify and assess any imbalances that may exist Provide information and guidance relevant to helping me nourish, stimulate or balance vital energy Develop a plan with me for lifestyle changes that may improve my general health and wellness
Please initial in agreement to the following: Please initial ALL lines below to indicated you that you have read, understand, and agree.
Patient Information Document: I have read all information contained in this packet and have been provided with a copy of the Patient Information Document, the originals of which will be kept by The Ayurvedic Institute for at least three years. 48 Hour Cancellation Policy: If I need to cancel an appointment and do not cancel more than 48 hours before the scheduled appointment time, I understand that I will be charged full price for the appointment. Timeliness: I commit to attending the scheduled appointment(s) on time. If I do not arrive for my scheduled appointment, I understand that I will be charged full price for the appointment. Teaching Facility: The Ayurvedic Institute is principally a teaching facility. Consultations will be conducted in a private setting, under supervision of a Clinical Supervisor (within the Student Clinics), and additional student observers may be present. Consultation Costs: Supervised ASP 2 Student Clinic Fee Sliding Scale \$30 - \$50 (Consultations are approx. 60 minutes) Senior Practitioner Clinic Fee Sliding Scale \$70 - \$95 (Consultations are approx. 60 minutes)
 Your signature below indicates that you have read, understand, and agree to the following: I will study the information provided and participate in the design of the health and wellness plan I will implement my health and wellness plan according to my ability I will notify my primary care provider, if under care, of my intention to begin this health and wellness plan I will discontinue any or all of the health and wellness plan elements if any discomfort occurs, and notify the Ayurvedic Institute at 1(505)291-9698, and my primary care provider, if any. In the case of disputes or claims that cannot be resolved privately between myself and the Ayurvedic Institute or any employee or student thereof, I agree to submit such dispute or claim to the American Arbitration Association and agree to be bound by their rules and final decision. I understand that this is an educational Ayurvedic Consultation and this consultation does not include medical diagnosis or medical treatment, is not a substitute for medical care, and is not an agreement for on-going care. I understand that my patient file and health information may be used as part of the education within the classroom, originals of which will be kept by The Ayurvedic Institute for at least three years. I understand that The Ayurvedic Institute is not responsible for any herbal contraindications, and I acknowledge that I am solely responsible for discussing any herbal recommendations I receive with my healthcare provider.
I hereby acknowledge and authorize that the information I provide in this consultation and subsequent information accumulated in my health information files may be used in whole or in part as a case study by the instructors of the Ayurvedic Institute for educational purposes. My personal identification will be carefully protected from disclosure.
I hereby apply for services from the Ayurvedic Institute and agree to participate in the development of my health and wellness plan and authorize The Ayurvedic Institute and its practitioners to perform any of the above defined services. By signing, I acknowledge that understand and agree to all the terms and conditions detailed in the Patient Information Document.
Name (printed)
Signature of Patient/Guardian (or third party, as appropriate)



Health Information and History

CONTACT INFORMATION:

DOB: (MM/DD/YYYY)	Name:		Date:			
Mobile Phone:	Home Address:					
PERSONAL INFORMATION: DOB: (MM/DD/YYYY)	City:		State/Region:	Postal Code,	′Zip:	
DOB. (MM/DD/YYYY) Time of Birth (include AM/PM):	Mobile Phone:	Home Phone:	Email:	:		
Place of Birth: City:	PERSONAL INFORMATION:					
Age:Gender:Occupation:	DOB: (MM/DD/YYYY)		Time of Birth (ir	nclude AM/PM):		
Marital Status: Children & Ages:	Place of Birth: City:		State/Region:	Country:_		
Referred by: Family Physician: Phone:	Age: Gender:		Occupation:			
Primary Care Provider Name & Title:	Marital Status:	Children & Ag	és:			
Address:	Referred by:		Family Physician:			
A) Are you currently under a physician's care for a specific medical problem? If yes, for what and for how long? CONCERNS: Please tell us your present concerns and/or conditions. How long have they troubled you? B) What would you like to achieve or change in terms of your health and wellness? History of Smoking: (what, how often, how much, how many years) Drinking Alcohol: (what, how often, how much, how many years) Recreational/Non-prescription Drugs: (what, how often, how much, how many years) What surgeries have you had? (Include dates) Last physical examination: Date: Blood Pressure: Cholesterol: Height: Weight: Weight Changes?	Primary Care Provider Name 8	₹ Title:		Pho	ne:	
CONCERNS: Please tell us your present concerns and/or conditions. How long have they troubled you? B) What would you like to achieve or change in terms of your health and wellness? History of Smoking: (what, how often, how much, how many years) Drinking Alcohol: (what, how often, how much, how many years) Recreational/Non-prescription Drugs: (what, how often, how much, how many years) What surgeries have you had? (Include dates) Last physical examination: Date:	Address:		City:	State:	Zip:	
Drinking Alcohol: (what, how often, how much, how many years)						
Drinking Alcohol: (what, how often, how much, how many years)						
Recreational/Non-prescription Drugs: (what, how often, how much, how many years) What surgeries have you had? (Include dates) Last physical examination: Date: Blood Pressure: Cholesterol: Height: Weight: Weight Changes?	History of Smoking: (what, how	v often, how much, how r	many years)			
What surgeries have you had? (Include dates) Last physical examination: Date: Blood Pressure: Cholesterol: Height: Weight: Weight Changes?	Drinking Alcohol: (what, how o	often, how much, how ma	any years)			
Last physical examination: Date: Blood Pressure: Cholesterol: Height: Weight: Weight Changes?	Recreational/Non-prescription	n Drugs: (what, how ofter	n, how much, how many year	rs)		
Last physical examination: Date: Blood Pressure: Cholesterol: Height: Weight: Weight Changes?	What surgeries have you had?	(Include dates)				
Height: Weight: Weight Changes?						

What prescription drugs or medications are you currently taking or have taken within the last 6 months?

Prescription:	Reason	Duration taken	Current dosage	Quantity	Frequency per day	Before/after/during or between meals
Herbal/ vitamin supplements	Reason	Duration taken	Current dosage	Quantity per	Frequency per day	Before/after/during or between meals
Attach additional sheet(s) if necessary Objectives: Please note that Ayurvedic Consultations do not include medical diagnosis and treatments. If you are concerned about a medical condition or a latent or potential medical condition you should see a medical doctor.						
Please check the items that reflect your main objectives:						
1. I would like an alternative approach to allopathic medicine for managing illness and disease.						
2. I would like to improve my general health and wellness and reduce my vulnerability to illness and disease.						
3. I would like to improve my lifestyle and dietary practices to improve my health.						
4. I would like to change my habits and behavioral patterns to improve my relationships with others.						
5. I would like to manage stress, tension, and worry to attain a more stable emotional nature.						
How would your life be different if you were to achieve these objectives to your satisfaction?						

Myself	Maternal	Paternal D D D D D D D D D D D D D D D D D D	Stroke Cerebrovascular Accident Cancer Chemotherapy Radiation Treatment	Myself	Maternal	Paternal
			Cerebrovascular Accident Cancer Chemotherapy			
			Cancer Chemotherapy			
			Chemotherapy			
			Radiation Treatment			
			Hepatitis A			
			Hepatitis B			
	Ш		Hepatitis Non-A / Non-B			
			Mononucleosis			
			Jaundice			
			Anemia			
			Gallstone			
			Kidney Disease			
			Kidney Stones			
			Bladder Disease			
			Thyroid Condition			
			Thyroid Medication			
			Ulcers			
			Intestinal Bleeding			
			Chronic Constipation			
			Recurring Diarrhea			
			Arthritis			
			Implant			
			Prosthesis			
			Prolonged Bleeding If Cut			
			Psychiatric Treatment			
			Venereal Diseases (STDs)			
			HIV Exposure			
			Sleep Disorders			
					Kidney Stones	

Any other family illnesses not listed ? _____

History of Any Other Disease or Problems? Please list any other pers	onal illnesses, surgeries, diseases, injuries, trauma, emotional
stresses, mental stresses, life–style conditions, addictions, alcohol, druger stresses, mental stresses, life–style conditions, addictions, alcohol, druger stresses, mental stresses, life–style conditions, addictions, alcohol, druger style	
help us clearly understand your health condition:	
EXERCISE: Do you currently engage in any exercise or physical activity	? If so, what type(s)?
Have you ever done Yoga postures before? If so, what type(s), how often	en?
*FEMALES ONLY Age of creek of recent of	Number of Weeks
*FEMALES ONLY: Age of onset of menses: Are you curr	
Number of previous pregnancies: Dit	
Complications:	
	? How long?
Date of Last Menstrual Period: Length of cycle	:: Days between cycles:
Cycles: Regular Irregular Color of Blood:	Flow: Heavy Medium Ligh
Clots:	Pain and/or difficulty during cycle?
PMS symptoms:	
Any other symptoms during cycle:	
Yeast infections? Urinary tract infection	ı (UTI) (frequency, duration):
Menopausal stage / symptoms:	
Other information:	
*MALES ONLY: Prostate Condition?	
Other information:	

Check All That Apply To You Currently And Within The Last Six (6) Months:

Category:			
Digestion	Irregular with Bloating Gas/Flatulence Abdominal Discomfort Gurgling Intestines Breathlessness	Quick digestion with Acid Indigestion Heartburn Burning pain Still hungry after eating Nausea Vomiting	Slow digestion with Feeling of heaviness Lethargy Sleepy after eating Low energy after meals Excess mucous secretions
Appetite	Irregular Sometimes eats at midnight	Excess hunger Sharp hunger Desire to eat large amounts of food Strong unbearable appetite Feels hypoglycemic	Emotional eating (No urge for food but still eats) Dull / No appetite
Cravings	Fried food Hot spicy food Meat or other protein	Sweets Cooling foods & drinks	Hot, sharp, dry & spicy food Wine or alcohol
Elimination	Tendency toward constipation Dry Irregular Defecates without satisfaction Passes gas during elimination	Loose stools Diarrhea	Mucous in stool
Pain	Shifting Tearing Moving Vague Throbbing Colicky Cutting Excruciating with breathlessness, fear and tachycardia	Burning Sharp Hot Migraine headaches Sucking pain with fever, nausea and irritability Intense pain	Dull Stable Deep dull aching pain Can sleep through the pain
Skin	Dry Cracked Rough Thin Discolored Patchy	Hives Rash Urticaria Acne Tender Warm/hot to touch Redness Boils Ruddy	Excess oily Thick Pallor Cold/clammy Lustrous Itchy
Sweating	Scanty or no sweat	Excess Profuse with body odor	Cold/clammy

Category:			
Sleep	Insomnia Need night light Restless Difficulty falling asleep	Interrupted sleep Must have complete darkness Needs to read/TV to sleep	Excess sleep Daytime napping Heavy sleeper Slow to awaken Hypersomnia
Seasonal Allergies	Breathlessness Wheezing Constricted Breathing	Rash Itching eyes Hives Irritation Inflammation	Runny nose Watery eyes Congestion
Food Sensitivity	Night shades Leftovers Dry fruits Raw food	Hot spicy foods Sour foods Fermented foods	Dairy products
Muscle Reactivity	Twitching Cramping Weakness Numbness Tingling Spasms	Bruising Tenderness to touch Sore Excess heat	Tumors Cysts Growths Generalized weakness
Bone and Joints	Painful Popping Cracking Stiffness Loose Osteopenia Osteoporosis Medical fractures Scoliosis	Inflamed Hot / feverish Tender Inflammatory arthritis Osteomyelitis Bursitis	Swollen joints Bone tumors Bone spurs Osteosarcoma Non-inflammation with profuse infusion Sclerosis
Circulation	Cold extremities (hands, feet)	Burning hands / feet Bruises easily Tendency toward bleeding	Cold clammy hands Varicose veins Thrombotic element
Body weight	Variable Can't gain weight Thin or slender	Stable Tendency toward hyper metabolism	Tendency to easily gain weight Over-weight Obese Voluptuous Stout

Category:			
General Symptomatology	Dry cough Ringing ears Light-headed Dryness: external/internal Hemorrhoid: External/ non- bleeding Low back ache Irregular metabolism Dry mouth Receding gums Blackish brownish discoloration Fatigue Lack of power, tone & strength Paralysis Slipped disc Hernia Difficulty sweating Cold extremities (hands, feet)	Spontaneous bleeding Hyper-sensitive to smells Hair loss Excess thirst Hemorrhoid: Internal/bleeding Hot flashes Tendency toward inflammatory conditions Acidic saliva Hyper acidity Yellowish discoloration Fainting High metabolism	Cold Cough Congestion Excess urination Frequent urination Fibrocystic Over salivation Edema Slow metabolism Albuminuria Lipoma(s) Cataracts
Mental- Emotional	☐ Transient Depression ☐ Inability to concentrate ☐ Forgetful ☐ Worry ☐ Fear ☐ Anxiety ☐ Insecurity ☐ Loneliness ☐ Nervousness ☐ Grief ☐ Restlessness ☐ Repetitive thinking ☐ Spacey	Extreme depression with suicidal tendencies Anger Rage Resentful Judgmental Critical Envious Sharp tongued Vengeful Intolerant Irritable Aggressive Success-Failure mind set Seeks power, prestige and position	Prolonged depression Sloppy Slow Confused Greed Attachment Mental lethargy Resistant to change Laziness Unforgiving Stubborn Boredom
Nature of response within relationships Other (Not Listed Abo	Talkative Uncertain Anxious Lonely Insecure Excitable Shy Spacey	Seeks power, prestige and position Perfectionist Competitive Seeker of knowledge	Based on acquiring comfort and pleasure