

## Initial Assessment

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

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### BACKGROUND QUESTIONS

Preferred phone: \_\_\_\_\_ Email: \_\_\_\_\_

Occupation: \_\_\_\_\_ Best time to reach you: \_\_\_\_\_

Marital status (please check):      Single      Married      Divorced      Widowed      Partnered

Please list the names of the people in your household and how they are related to you:

\_\_\_\_\_  
\_\_\_\_\_

What is the highest level of education you completed? \_\_\_\_\_

Why are you seeking services? \_\_\_\_\_

What personal goals can we help you achieve? \_\_\_\_\_

What services are you most interested in?

#### BARIATRIC SURGERY

Gastric bypass  
Gastric sleeve  
Laparoscopic gastric band (LAP BAND®)

#### MEDICAL WEIGHT MANAGEMENT

Lifestyle changes  
Weight loss medications (if appropriate)  
New Direction®

Continued >

# Initial Assessment (continued)

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## GENERAL HEALTH QUESTIONS

Primary care provider: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

When was your last physical exam? \_\_\_\_\_ When were your last blood tests? \_\_\_\_\_

How would you rate your health? (please check):      Excellent      Good      Fair      Poor

Height: \_\_\_\_\_ Current weight: \_\_\_\_\_

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## MEDICAL HISTORY Mark (x) all that apply:

- |                                       |                                       |                                     |
|---------------------------------------|---------------------------------------|-------------------------------------|
| Acid reflux (GERD)                    | Emphysema/chronic bronchitis          | Multiple sclerosis (MS)             |
| Anemia                                | Epilepsy/seizure disorder             | Obsessive compulsive disorder (OCD) |
| Anorexia                              | Fatty liver disease                   | Osteoporosis/penia                  |
| Anxiety                               | Gallbladder disease/stones            | Polycystic ovarian syndrome (PCOS)  |
| Arthritis                             | Glaucoma                              | Pacemaker                           |
| Asthma/lung problem                   | Gout                                  | Prostate problem                    |
| Attention deficit disorder (ADD/ADHD) | Heart disease/heart attack            | Sickle cell disease                 |
| Bipolar disorder                      | Heart murmur                          | Sleep apnea                         |
| Bleeding disorders                    | Hepatitis                             | Stroke                              |
| Blood clot/DVT                        | High blood pressure/hypertension      | Thyroid disease                     |
| Bulimia                               | High cholesterol                      | Tuberculosis                        |
| Cancer                                | HIV disease                           | Ulcer disease                       |
| Celiac disease                        | Irregular menstrual periods           | Other                               |
| Congestive heart failure              | Impaired fasting glucose/pre-diabetes | _____                               |
| Drug/alcohol dependency               | Kidney disease/stones                 | _____                               |
| Depression                            | Liver disease                         | _____                               |
| Diabetes (type 1)                     | Migraines                             |                                     |
| Diabetes (type 2)                     |                                       |                                     |

Continued >

# Initial Assessment (continued)

Average hours of sleep each night: \_\_\_\_\_ Do you feel refreshed after you sleep? Yes No

How would you rate your stress level? **Low** 1 2 3 4 5 **High**

How do you deal with the stress of daily life? \_\_\_\_\_

Are you currently seeing a mental health professional? Yes No

If yes, please add name and contact information: \_\_\_\_\_

List all previous surgeries with date: \_\_\_\_\_

List your current medications and dosages. (Include any vitamins and supplements.)

- |          |          |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

Are you allergic to any medications? \_\_\_\_\_

Tobacco history (please check): Never smoked Used to smoke Currently smoke \_\_\_\_\_ (packs per day)

Alcohol history (please check): Do not drink Currently drink \_\_\_\_\_ drinks per week

Recreational drug use (please check): Never Used to use Currently use  
 Type \_\_\_\_\_  
 How often \_\_\_\_\_

## FAMILY HEALTH HISTORY

RELATION	AGE	MEDICAL CONDITIONS	OVERWEIGHT OR OBESE?	AGE AT DEATH
Father				
Mother				
Siblings				

Continued >

## Initial Assessment (continued)

RELATION	AGE	MEDICAL CONDITIONS	OVERWEIGHT OR OBESE?	AGE AT DEATH
Partner				
Children				

### NUTRITION QUESTIONNAIRE

What would you like to change about your diet? \_\_\_\_\_

Do you read food labels? If yes, what do you look for? \_\_\_\_\_

How confident are you about the *amount* of current nutrition knowledge you have? **Low** 1 2 3 4 5 **High**

How confident are you about your ability to *apply* the nutrition knowledge you have? **Low** 1 2 3 4 5 **High**

Do you have any food allergies? If yes, please list: \_\_\_\_\_

Do you follow any special diet or dietary restrictions? If yes, please explain:

\_\_\_\_\_

When and what do you usually eat in a typical day? Please list what you eat and drink in a **normal** day in the table below:

BREAKFAST	SNACK	LUNCH	SNACK	DINNER	SNACK	FLUIDS

Continued >

# Initial Assessment (continued)

What do you usually drink throughout the day? \_\_\_\_\_

How many meals per week do you eat in restaurants/order takeout? \_\_\_\_\_

The following questions ask about your eating patterns and behaviors within the last 3 months. For each question, choose the answer that best applies to you.

During the last 3 months, did you have any episodes of excessive overeating (i.e., eating significantly more than what most people would eat in a similar period)?

Yes      No

NOTE: IF YOU ANSWERED "NO" TO QUESTION 1, YOU MAY STOP. THE REMAINING QUESTIONS DO NOT APPLY TO YOU.

Do you feel distressed about your episodes of excessive overeating?

Yes      No

During your episodes of excessive overeating, how often did you feel like you had no control over your eating (e.g., not being able to stop eating, feel compelled to eat, or going back and forth for more food)?

Never or Rarely      Sometimes      Often      Always

During your episodes of excessive overeating, how often did you continue eating even though you were not hungry?

Never or Rarely      Sometimes      Often      Always

During your episodes of excessive overeating, how often were you embarrassed by how much you ate?

Never or Rarely      Sometimes      Often      Always

During your episodes of excessive overeating, how often did you feel disgusted with yourself or guilty afterward?

Never or Rarely      Sometimes      Often      Always

During the last 3 months, how often did you make yourself vomit as a means to control your weight or shape?

Never or Rarely      Sometimes      Often      Always

Do you have a history of an eating disorder? If yes, please check:

Compulsive overeating      Binge eating disorder      Anorexia      Bulimia

Do you feel that you have a food addiction (loss of control over how much food you eat)?      Yes      No

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# Initial Assessment (continued)

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## PHYSICAL ACTIVITY QUESTIONNAIRE

What is the most active thing you do in an average day? \_\_\_\_\_

What, if any, regular exercise do you do and how often? \_\_\_\_\_

In general, how much do you enjoy doing physical activity? Please rate below:

**Low enjoyment**    1    2    3    4    5    **High enjoyment**

What makes it hard for you to exercise? \_\_\_\_\_

Is there any other reason why you do not do physical activity?    Yes    No

When you exercise or exert yourself, do you have any of the following? Please check any that apply:

Shortness of breath    Chest pain or pressure    Pain in your calves

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## WEIGHT HISTORY

What has been your lowest body weight as an adult? \_\_\_\_\_ lbs. At what age? \_\_\_\_\_

What was your highest body weight as an adult? \_\_\_\_\_ lbs. At what age? \_\_\_\_\_

Have you participated in a commercial or professional weight loss program before?    Yes    No

If yes, please check which ones:

Weight Watchers    Jenny Craig    NutriSystem    Weight Loss Medication \_\_\_\_\_  
(name of medication)

Other \_\_\_\_\_

Have you seen a registered dietitian (RD) before?    Yes    No

Have you ever had weight loss surgery? If so, which one and when? \_\_\_\_\_

What is the most amount of weight you've lost in the past? \_\_\_\_\_ lbs.

What are the biggest challenges you have in losing weight/maintaining weight loss? \_\_\_\_\_

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How important is it for you to make lifestyle changes?

**Very important**    1    2    3    4    5    **Not important**

How confident are you in your ability to make lifestyle changes?

**Very confident**    1    2    3    4    5    **Not confident**

Continued >

## Initial Assessment (continued)

**SIX-FACTOR TRAIT QUESTIONNAIRE (6-FTQ)** Please check your level of agreement to all statements:

	Disagree	Agree a little	Agree	Strongly agree
<b>CONVENIENT DINER</b>				
1. I rarely take the time to plan my meals.	0	1	2	3
2. A lot of my meals are eaten in restaurants or taken out.	0	1	2	3
3. Most foods I eat are convenient, ready-made, packaged, frozen or microwavable.	0	1	2	3
4. I eat a fast-food meal on most days of the week.	0	1	2	3
5. I do not have consistent meal patterns from one day to the next.	0	1	2	3

**Add up your total for this section:**

<b>FAST PACER</b>				
6. My fast-paced life leaves me feeling drained and scattered.	0	1	2	3
7. I feel like I'm juggling too many things at once.	0	1	2	3
8. I usually take care of everyone else and put myself at the bottom of my to do list..	0	1	2	3
9. My hectic schedule makes it hard for me to focus on my health.	0	1	2	3

**Add up your total for this section:**

<b>EASILY ENTICED EATER</b>				
10. I have difficulty controlling my portion sizes.	0	1	2	3
11. I often eat out of habit, not because I am hungry.	0	1	2	3
12. When I'm stressed, lonely, anxious or depressed, I turn to food for comfort.	0	1	2	3
13. If there is food around me, I'll probably eat it.	0	1	2	3
14. I snack throughout the day, hungry or not.	0	1	2	3
15. I will eat until I'm too full and may even eat more.	0	1	2	3

**Add up your total for this section:**

Continued >

## Initial Assessment (continued)

**SIX-FACTOR TRAIT QUESTIONNAIRE (6-FTQ)** Please check your level of agreement to all statements:

	Disagree	Agree a little	Agree	Strongly agree
<b>EXERCISE STRUGGLER</b>				
16. Being physically active has never been a priority.	0	1	2	3
17. I don't enjoy exercise because I don't like it.	0	1	2	3
18. I never got "into" exercising because I am not sure where to start.	0	1	2	3
19. I have difficulty exercising.	0	1	2	3
<b>Add up your total for this section:</b>				
<b>SELF-CRITIC</b>				
20. I measure my self-worth by the numbers on the bathroom scale.	0	1	2	3
21. I focus on the things I don't like about my body.	0	1	2	3
22. I make a habit of saying bad things about myself.	0	1	2	3
23. I avoid social situations because of my weight.	0	1	2	3
<b>Add up your total for this section:</b>				
<b>ALL-OR-NOTHING DOER</b>				
24. I approach my weight loss like it's just another project with a clear beginning and end.	0	1	2	3
25. I'm either on or off my diet. There's no middle ground with me.	0	1	2	3
26. When I'm trying to lose weight, I give 100% of my effort, but this is hard to sustain.	0	1	2	3
27. I am all or nothing when it comes to dieting or exercising to lose weight.	0	1	2	3
<b>Add up your total for this section:</b>				