



New Client Instructions

4-Week Initial Assessment Processing (Step 1 to 19)

Welcome to **Advanced Clinical Nutrition!**

Initial Assessment - Defined

The “**Initial Assessment**” is the term we use for processing all procedures required for Dr. Smith to design your initial (first) Clinically-formulated, Therapeutic Supplement and Dietary Programs, and provide your first shipment of therapeutic supplements, based on one of the following.

1. Nutritional Evaluation(s).
2. Specialized Clinical Nutrition Program to support a medical diagnosis.
3. Physician-Initiated Lab Tests.

Initial Assessment Processing Procedures - Defined

To accomplish the above is to complete the “**Initial Assessment Processing Procedures**,” which requires collaborating team efforts from the client, Dr. Smith and her staff. This process generally takes four weeks.

This document provides **special Instructions** for the processing procedures. Client procedures are outlined in **Steps #2 to #19 on the “New Client Instructions”** web page. These steps are designed to assist new clients, as follows:

1. **Complete and Send** Health and Symptoms History Questionnaires to us by fax, email or U.S. mail. If applicable, this also includes sending medical interpretation reports, verification of diagnosis and/or physician-oriented lab reports.
2. **Introduce** the “**New Client Orientation**” **Consultations** Program to build a solid foundation of knowledge, assure successful implementation of programs, and development of a principle-centered, healthy lifestyle, including dietary practices, to attain healing and health maintenance.
3. **Read** preliminary educational articles regarding therapeutic supplements and “New Client Orientation.”
4. **Read** policies to assist client in developing a healthy working relationship with Dr. Smith and her staff so that services may be provided in a timely and efficient manner.

Please let go of any thoughts or emotions about being “overwhelmed” by completing 19 steps in four weeks. The time required for all steps range from some requiring only a few minutes and others are longer, however, all steps can be accomplished in the four weeks that represent your Initial Assessment Processing Period.



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This process is also quite self-educating and thought-provoking. Socrates said, “An unexamined life is not worth living.” However, Dr. Smith adds, “Examination of every positive and negative belief, thought and action is foundational to creating a life worth living and long-living. So, enjoy the process.

New Client Instructions Web Page

On each row of the “New Client Instructions” web page, you will find the Title (left) and its PDF Document (right). In numerical order, please open each PDF document and complete each step as instructed. Below is an overview of these steps and when they are to be completed during the four weeks of the Initial Assessment Processing for either the Nutritional Evaluation, Specialized Clinical Nutrition Program For Medical Diagnosis, or Physician-Initiated Lab Test(s):

Important Note:

The steps outlined on this web page are designed for processing Lab Kit(s) and/or having blood drawn through **Advanced Clinical Nutrition**. Therefore, when completing Steps 1-19, you may omit all instructions that relate to preparing and collecting specimen samples.

Nutritional Evaluation

Dr. Smith has a variety of Nutritional Evaluations that may be used for Initial Assessment for special needs cases. Nutritional Evaluations are defined on the pop-up webpage titled “Tests/Evaluations Defined” under the “Why Test?” webpage listed in Table of Contents

If this applies to you, please complete Steps 1-19 as follows:

- **Step 1-10**: Complete Steps 1-10 within 1-2 weeks after payment of your Nutritional Evaluation.
- **Steps 11-19**: Complete within 1-2 weeks after completing Steps 1-10 and before the **Report of Findings Telephone Consultation** appointment.

Specialized Clinical Nutrition Support Program

This relates to when a client is providing medical proof of diagnosis, with supportive medical interpretation reports and/or lab tests and Dr. Smith is designing a Clinical Nutrition Therapeutic Supplement and Dietary Program to support their medical diagnosis in lieu of having their Initial Assessment designed from testing their biochemistry (blood, urine, hair,



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saliva or stool) through Dr. Smith. In these cases, Dr. Smith will review, but not analyze lab tests, if provided. Analysis is not required as programs are designed based on diagnosis alone.

If this applies to you, please complete Steps 1-19 as follows:

- **Step 1-7:** Complete Steps 1-7 within one week from date of paying for your Initial Assessment and while waiting for copies of your medical interpretation reports and verification of diagnosis documentation from physician. This may or may not include lab tests from physician.
- **Steps 8-10:** Before or within one week from date medical documents have been received, sent medical documents and Health and Symptoms History Questionnaires to our office by fax, email or U.S. mail.
- **Steps 11-19:** Complete within 1-2 weeks after completing Steps 1-10 and before the **Report of Findings Telephone Consultation** appointment.

Physician-Oriented Lab Tests

This relates to when a client is providing recent biochemistry testing from their physician or other health care professional. This is generally blood, urine or stool testing, though it may be an MRI or some other medical testing. By recent, this means that Dr. Smith has determined that the test values are still valid.

Regarding Steps 1-19, follow the same instructions above under "Specialized Clinical Nutrition Support Program."

QUESTIONS?

- **Steps 1-10:** If you have any questions about completing Steps 1 to 10, **please call our office immediately**. Do not email or this will cause delays in processing your Initial Assessment.
- **Steps 11-15:** Please **email** any questions you have about Step 11-15 to Dr. Smith **prior to your RF appointment**. Answers will be provided at the end of this appointment, i.e., after test results and program implementation instructions have concluded.



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- **Steps 16, 17, & 19:** Please schedule an **Administrative Telephone Consultation** with Dr. Smith (no charge) or you may ask for this appointment be added at the end of any prescheduled New Client Orientation or Progress Reporting Consultation. This appointment can be scheduled at any time you choose. Please email questions before this appointment
- **Steps 18:** For answers to questions, you have two choices:
 - To schedule a **PEP (Self-Motivation) Telephone Consultation** with Dr. Smith (fee-based) and email questions before this appointment. This appointment may be scheduled at any time you choose and as you progress, new challenges and questions may arise, so this type of consultation may be scheduled as often as you desire or is necessary. OR
 - You may receive answers to these questions, as they arise, at any upcoming pre-scheduled "New Client Orientation" or Progress Reporting consultation. Note: These consultations are designed to assist client in pacing and self-motivating to assure consistent program implementation and to develop lasting dietary and lifestyle changes.
 - Please email questions prior to the appointment you have chosen to receive answers.

Business Phones and Your Caller ID

Please note the following regarding our business phone numbers.

- (940) 761-4045 – This is the Office number to use whenever you need to call us.
- (940) 761-4405 – This is our Fax number and more often the phone number you will see on your Caller ID. To keep our office line open for incoming calls we use our fax line to place outgoing calls. Therefore:
 - If you see our phone number on your caller ID, more than likely you will want to switch the two middle numbers in the last four (i.e., 4405 becomes 4045) and then you will have the office number to return our call. Otherwise, if you call the number on your Caller ID, you will get that awful screeching fax noise.
 - If you need to fax and the line is busy, now you know why, so the best times to fax us are during our off hours. In other words, before 10 a.m., and after 6 p.m. C.S.T.
 - Dr. Smith uses the fax line for all consultations, and thus will call you.

Conclusion

Completing Steps #1-19 as instructed is being "proactive" - the first step to becoming and staying healthy for the rest of your life. The term "proactive" is defined in Step 16.

Thank you in advance for helping us help you! The **Advanced Clinical Nutrition** Team