



Stacie V. Ellis, PhD, RDN, LD

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CONSENT FOR TREATMENT AND AUTHORIZATION FOR USE OF PROTECTED HEALTH INFORMATION

Patient Name: _____ DOB: _____

Parent/Guardian Name: _____ (Applies for patients under 18)

I hereby consent to participating in nutrition counseling with Excellis Nutrition LLC and understand that all information I provide is private, confidential, and protected by law. When necessary to coordinate my nutrition and healthcare my protected health information may be obtained from and/ or provided to my:

- Primary Care Doctor: _____ Address: _____ Phone: _____ Fax: _____ Other Doctor(Relationship): _____ Address: _____ Phone: _____ Fax: _____

Excellis Nutrition LLC and Stacie Ellis PhD, RDN, LD is hereby released from legal responsibility or liability for the release of information authorized here in. I understand that I have the right to revoke this authorization in writing at any time by sending notification to Stacie Ellis PhD, RDN, LD. I understand that I have the right to (1) inspect or obtain a copy of the protected health information to be provided as permitted under federal and state law, and (2) refuse to sign this authorization. My signature indicates understanding and acceptance of the above policies.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____ (If patient is under 18)

HIPAA Acknowledgement

By signing below I acknowledge that I received a copy of my rights as described in Health Insurance Portability and Accountability Act of 1996 (HIPAA).

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____
(If patient is under 18)

PAYMENT POLICY STATEMENT

Payment for services are due at the time services are rendered, unless arrangements have been made in advance or services are paid online. Excellis Nutrition, LLC is a partner with Fay Nutrition. All insurance clients will pay through the Fay Nutrition portal for their appointments if there is a corresponding fee. Self-pay clients and BCBS (excluding BCBS of Michigan) clients will pay Excellis Nutrition directly online via an invoice link that will be sent to them. Please make sure you have a correct email on file. Failure to pay for services within 60 days of service will result in legal action to render the required payment. If you plan on submitting a receipt to your insurance for reimbursement, please notify your dietitian so she can send you a Superbill with the correct diagnostic information for your insurance. Do not use the regular receipts from your online transactions as these will lack these diagnostic codes. Individuals using their insurance for services are responsible for any payment your insurance denies and will be billed at a later date. You are welcome to contact your insurance provider prior to your appointment to determine your benefits for "nutritional counseling" prior to your appointment. Also if you want to know the price of the sessions in case insurance does not cover your visit, please contact Excellis Nutrition directly to get a price breakdown of charges. If you are booking through Fay Nutrition, the platform should notify you of any charges. By signing you agree to the terms of this payment policy.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____
(If patient is under 18)

CANCELLATION/ LATE RESCHEDULING OF APPOINTMENT POLICY

There will be \$60 cancellation fee for any appointment where a client does not show up or they failed to cancel or reschedule their appointment **within 24 hours** of their appointment. This fee helps pay for the administrative charges that are in conjunction with the appointment and are not billed to your insurance. Upon scheduling your appointment, you must agree to pay this fee if you fail to cancel your appointment in sufficient time. If your credit card is saved on your account, your credit card will be automatically charged for such fees. If not, an electronic invoice will be issued and it must be paid within 60 days. Failure to do so will result in legal action to render payment.

Excellis Nutrition is aware that there are special cases where an emergency may be granted for cancellation. Excellis Nutrition is sensitive to these cases, however would like to encourage individuals to limit late cancellations and rescheduling due to limited appointment times available for others. It is common for appointments to be scheduled weeks in advance due to limited availability. By cancelling or rescheduling your appointment early enough, this gives the opportunity to open that time for others

In cases where individuals cancel or reschedule their appointment last minute regularly, they may forfeit their rights to be a client with Excellis Nutrition in the future. Please limit these late cancellations and rescheduling to absolute emergencies please. By signing you are agreeing to these cancellation policies.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____
(If patient is under 18)

CONSENT FOR TELEHEALTH

Telehealth involves the use of electronic communications to enable providers at different locations to share individual client information for the purpose of improving client care. The information may be used for diagnosis, therapy, follow-up and/or education, and may include health records, live two-way audio and video, or output data from health devices and sound and video files.

Electronic systems used will incorporate network and software security protocols to protect the confidentiality of client identification and imaging data and will include measures to safeguard the data and to ensure its integrity against intentional or unintentional corruption.

Possible Risks:

There are potential risks associated with the use of telehealth. In rare cases, information transmitted may not be sufficient (e.g. poor resolution of images) to allow for appropriate decision making by the providers and consultant(s). In very rare instances, security protocols could fail, causing a breach of privacy of personal health information.

By signing, you agree to the usage of telehealth and understand the following:

1. I understand that the laws that protect privacy and the confidentiality of health information also apply to telehealth, and that no information obtained in the use of telehealth which identifies me will be disclosed to researchers or other entities without my consent.
2. I understand that I have the right to withhold or withdraw my consent to the use of telehealth in the course of my care at any time, without affecting my right to future care or treatment.
3. I understand that I have the right to inspect all information obtained and recorded in the course of a telehealth interaction and may receive copies of this information for a reasonable fee.
4. I understand that telehealth may involve electronic communication of my personal health information to other practitioners who may be located in other areas, including out of state.
5. I understand that I may expect the anticipated benefits from the use of telehealth in my care, but that no results can be guaranteed or assured.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____
(If patient is under 18)

CONSENT FOR AI SCRIBE

With the increase in technology, practitioners now have a chance to be more present in their sessions with clients with the help of a HIPPA compliant AI tool. HIPPA compliant, meaning your medical information will be protected and kept confidential. Excellis Nutrition is aware of the growing concern regarding the use of AI and understands the hesitation that some individuals may have regarding its usage in the sessions. The benefit of using the AI scribe is that the practitioner can be more present in the session without being distracted with note taking. The AI scribes have been shown to be more accurate and more detailed with the charting and has been shown to improve patient care due to the clinician's ability to be more present in the session. It has also been shown to improve practitioner's wellbeing, provide more time with clients, and help prevent burnout from excess paperwork. Excellis Nutrition aims to use only the safest and most reliable platforms and will not partner with any AI tool that is not HIPPA compliant. All charts will also be reviewed to ensure its accuracy. In order for your practitioner to use an AI scribe, you will have to give permission for her to do so; however you may opt out of its' usage at any time. By signing below, you are agreeing to the use of a HIPPA compliant AI Scribe.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____
(If patient is under 18)

CONSENT FOR EMAIL/ TEXT CORRESPONDENCE

Email/text communication is a convenient form of communication among individuals, however; transmitting information by email/text can create a number of risks. By signing you are allowing the usage of correspondence via email/text and acknowledging the risks involved in such communication and release Excellis Nutrition LLC from any liability associated with such risks.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____

CONSENT FOR RESEARCH

Continued nutrition research is a vital part of improving the health and wellbeing of individuals. Dr. Ellis and her colleagues continue to work on finding new ways to reach the general public, and you can be a part of these efforts. By signing below, you agree to allow any information that is obtained from your treatments to be used for future research purposes. All identifier information will be removed from all data that is used for such studies to protect your rights as a patient. You have the right to opt out of future research at any time, and you have the right to any data that has been collected on you.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____

CONSENT FOR MARKETING

Nutrition education is needed to reach the general public. One of these ways of doing this is through marketing efforts. Marketing efforts through Excellis Nutrition may be in the form of advertisements, speaking engagements, health fairs, social media posts, posts on the website, or hard copy marketing materials. Sharing experiences from current patients can be helpful at motivating others to change their lifestyle habits. By signing below you are allowing some of your experiences to be used for marketing purposes. Experiences include quotes, positive outcomes, and shared experiences that can relate to our target audience. All identifier information will remain confidential and HIPPA compliant. Clients are welcome to share actual testimonies, pictures, or experiences that they would like to share for future marketing purposes as well, but this is optional.

Please sign if you are willing to use your experience for future marketing purposes.

Patient Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____

____ Please initial if you are open to using direct quotes with your first and last initial for marketing purposes.

____ Please initial if you are open to the use of photographs or videos of yourself for future marketing purposes. You will be contacted for a second approval before such items are used.

NEW PATIENT/CLIENT REGISTRATION

Client Name: _____	Date of Birth: _____
Name of individual responsible for charges: _____	
Phone (if different from client): _____	

Client Information:

Address: _____	
City: _____	State: _____ Zip: Code: _____
Phone: Home _____	Cell _____
Email Address: _____	
Marital Status: _____	Number of People in Household: _____
Occupation: _____	Employer: _____
Insurance: _____	
Member Name: _____	
Member ID: _____	Group No: _____
Relation to member: <input type="checkbox"/> self <input type="checkbox"/> spouse <input type="checkbox"/> child	
Member Address on file with insurance (if different from above):	
Address: _____	
City: _____	State: _____ Zip: _____
Referral required: <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not sure	
Referring Doctor: _____	
Phone: _____	Referral number (if you have one) _____
Reason for visit today _____	
How did you hear about Excellis Nutrition? <input type="checkbox"/> Google <input type="checkbox"/> HealthProf.com <input type="checkbox"/> EatRight.org <input type="checkbox"/> Insurance	
<input type="checkbox"/> Referral by healthcare practitioner <input type="checkbox"/> Referred by friend <input type="checkbox"/> Other _____	

Acceptance of Registration Information

I hereby accept the registration information written above as accurate and acknowledge this information will be used to guide the Registered Dietitian in preparing my personalized plan of care.

Signature of New Patient/Client

Date

Medical History

Have you ever been diagnosed with any of the following? Check all that apply

- hypertension (high blood pressure) heart disease metabolic syndrome
- Diabetes- specify type 1 type 2 gestational
- Pre- diabetes hypoglycemia
- kidney disease-specify acute chronic stage 1 2 3 4 been on dialysis
- pulmonary disorder (ex: COPD, asthma) osteoporosis /low bone mass
- arthritis Auto immune disorder- specify _____
- Cancer- specify _____
- severe acne constipation diarrhea
- anemia-specify iron vitamin B12 vitamin B6
- disordered eating patterns (such as stress/emotional eating)
- eating disorder- specify anorexia bulimia binge-eating night eating syndrome
 - avoidant/restrictive food intake disorder purging disorder
 - atypical anorexia bulimia low frequency/duration
 - orthorexia pica body dysmorphia
- Reproductive condition- specify PCOS Endometriosis Fibroids Amenorrhea
 - Functional Hypothalamic Amenorrhea Oligomenorrhea
 - Dysmenorrhea (painful periods) menorrhagia (heavy bleeding)
 - metrorrhagia (bleeding at irregular intervals between periods)
 - hypomenorrhea (light periods)
 - Premenstrual Syndrome Premenstrual dysphonic disorder
- food intolerance- (ex. Lactose, gluten) specify _____
- food allergies- specify _____
- food sensitivities- specify _____
- digestive problems, please specify:

- thyroid problems, please specify:

- diagnosed mental health conditions please specify:

- other conditions, please specify:

abnormal labs

- Glucose- specify value _____ fasted? yes no
- HbA1c – specify value _____
- Insulin low high
 - low vitamin D levels low iron or ferritin level Low B12 low B6
 - low prealbumin, albumin, or CK low electrolytes (Mg, Ca, K, Na, CL)
 - Elevated CRP elevated TNF- α , IL-6, IL-1, IL-17, IFN γ , or B Cells
 - abnormal hormone levels- specify high estrogen low estrogen
 - high testosterone low testosterone
 - low progesterone low LH
 - low AMH Low FSH
 - elevated cortisol thyroid hormones
 - high cholesterol/ blood lipids- specify high LDL low HDL High TG
 - other abnormal labs _____

Please specify any lab values: _____

Holistic Health: For the next section, respond by circling the appropriate response based off of how you personally feel you are doing with each one.			
	Poor	Average	Excellent
Psychological health (mental health)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emotional health (mood, happy, sad, angry, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spiritual health (religion, self-reflection, volunteering in community, meaning, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal life (time for self, time with friends and family, hobbies, self-care, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional (time for lunch, boundaries, not overworked, time off, support, fulfillment, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School/college (workload, time management, academic success, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Feel free to further explain any answers here and any of its effects on your eating: _____

Exercise History:

Which of the following primarily describes your work, school, or daily activity? (This questions doesn't include structure exercise)

- Sitting Standing Walking or other active motion Heavy labor (heavy lifting)

Do you currently exercise? Yes Yes, but not consistently No

If yes, please specify what kind of activity, how many minutes and how many days a week.

Activity: _____

How long and how often: _____

If you do resistance training, please specify your workout split. Include the number of exercises per session, number of reps and sets. Do you train heavy, moderate, or light weights? _____

What is your goal with your workouts? _____

Are you new to exercising? Yes No

If no, how many years/months have you been exercising? _____

Are you working with a trainer? _____

Sleep

How many hours of sleep do you typically get a night? _____

Do you have a set sleeping schedule? Yes No

What time do you normally go to bed at night? _____

What time do you normally wake up? _____

Do you nap during the day? Yes No

Other than mid to late afternoon, do you feel tired throughout the day? Yes No

Optional: You may go to the following [link](#) to determine your chronotype. What was your chronotype results.

definite evening moderate evening intermediate moderate morning definite morning

Note: Definite evening like to go to bed roughly around 2:30-3am and wake up around 11am. Moderate evening goes to bed around 12:30-1am and wakes up 9-9:30 . Intermediate likes to go to bed around 10-11pm and wake up around 7:30am . Moderate morning likes to go to bed around 9:30pm and wakes up around 5:30-6am. Definite morning likes to go to bed around 8pm and wake up around 4am.

For Women only:

Do you currently have a regular menstruation? Yes No

If no, please explain: _____

Note- A regular cycle indicates having your period the same number of days each month with only a slight variation of 1-2 days. For example, a consistent 28-30 day cycle, or a consistent 35-37 day cycle.

Do you have a history of irregular menstruation. Yes No

If yes, please explain when and its irregularity: _____

Note- Irregularity means the time of your cycle varies in length from month to month. For example one month it is 28 days, the next month it is 32 days, the next month it is 36 days, etc.

Do you currently or previously have issues with heavy bleeding? Yes No

Is this a current issue? Yes No

Note- Heavy bleeding is defined as having to change your pad, tampon, or cup in less than 2 hours or losing more than 1/3 cup of total blood.

Do you have very painful periods? Yes No

Note- Painful periods can result in you staying home from school or work.

Do you frequently exhibit migraines or other PMS symptoms (i.e. bloating, tender breast, digestive issues, irritability, anxiety, etc.) Yes No

Do you experience these symptoms outside of during your period or around the time when you ovulate (for example for 1-2 weeks before your period)? Yes No

Do you experience bleeding between your cycles, particularly after ovulation. Yes No

With any of the above situations, did you see a doctor to help resolve the issue? Yes No

If yes, did the doctor prescribe birth control in order to regulate your cycle? Yes No

If yes, are you currently using birth control to regulate your cycle. Yes No

Do you currently track your cycle Yes No

How often do you have your period?

I am very regular (every 24-35 days)

I am more frequent (every 14-23 days)

I am less frequent (every 36-45 days)

I do not have a menstrual cycle (no cycle for longer than 3 months)

I am not sure how often I have my period

Note: a cycle includes the days of your period. So a 28 day cycle may include 3-5 days of a period and then also the days when you are not on your period. Your cycle begins on day 1 of your period.

Are you currently pregnant? Yes No

Are you currently nursing? Yes No

DIET AND EATING HABITS

Please indicate whether you have ever used any of these methods to control your body weight (check all that applies).

Method	When did you do this	Length of time used
<input type="checkbox"/> fasting		
<input type="checkbox"/> skipping meals Specify meals: _____		
<input type="checkbox"/> intermittent fasting Specify eating window _____		
<input type="checkbox"/> commercial weight loss programs Specify: _____		
<input type="checkbox"/> liquid supplements (ex: slim fast) Specify: _____		
<input type="checkbox"/> very low calorie diet (<1200 kcal/d) Calories consumed _____		
<input type="checkbox"/> self- induced vomiting		
<input type="checkbox"/> laxatives or diuretics		
<input type="checkbox"/> diet pills or "fat-burning" supplements		
<input type="checkbox"/> excessive exercise Specify _____ _____		
<input type="checkbox"/> low fat diet/ high carbohydrate diet		
<input type="checkbox"/> high protein diet/ low carbohydrate diet		
<input type="checkbox"/> high fat diet such as keto, Atkins, Zone diet		
<input type="checkbox"/> vegetarian/ vegan/pescatarian diet for the purpose of weight control Specify type: _____		
<input type="checkbox"/> nutritional counseling (ex: with a dietitian or nutritionist)		
<input type="checkbox"/> Calorie counting Calories consumed: _____		
<input type="checkbox"/> Other: _____		

Do you have any foods you do not eat for any reason? Yes ___ No ___

If yes, please specify: _____

Are there any foods that you would find difficult NOT to eat? Yes ___ No ___

If yes, please specify: _____

Have you changed your eating habits or appetite in the last 6 months? Yes ___ No ___

If yes, please explain: _____

Have you ben on any other special diet? Yes ___ No ___

If so, please specify: _____

Do you feel you are an emotional eater? Yes No

If yes, please explain: _____

How much and what kinds of foods do you eat during these times? _____

How often does this occur? (Circle one)

Daily 1 x a week 2-3x a week 4-6x a week 1x a month 2-3x a month Occasionally

Describe your present appetite. (Meaning do you get hungry, circle one)

Very good Good Okay Poor Very Poor

How is most of the food you eat cooked?

Boiled ___ Fried ___ Baked ___ Broiled ___ Grilled ___ Sauté ___

Other: _____

Who cooks the meals in your home? _____

How often do you have a home cooked meal (including leftovers)? _____

Do you use salt during cooking? _____ At the table? _____

What type of milk do you drink?

Skim 1% 2% Whole Buttermilk Flavored Milk Oatmilk

Almond Milk Soymilk Rice Milk None – I don't drink milk

Other: _____

How often do you drink it? _____

What beverages do you normally drink during the day? _____

How much do you drink a day? _____

Do you drink beer, wine or any other alcohol? Yes ___ No ___

If yes, what do you drink? _____

How much and how often? _____

How often do you get fast food during the week? _____

List some of the fast-food places you would go to and what you would order _____

How often do you eat at a sit-down restaurant during the week? _____

List some of the restaurants you would go to and what you would order _____

Please describe how you normally eat on a typical day. Please specify the amount, brands, and types of food. Please include what time you normally eat as well:

<u>Time</u>	<u>Meal</u>
	Morning meal

Mid-day meal

Evening meal

Snacks

Briefly describe what you hope to learn from this session: _____

If there is anything else you would like to share, please feel free to comment.

FOOD DIARY (RECOMMENDED, BUT OPTIONAL)

To help the RD get a better idea of your typical diet please complete this 3 day food diary and bring it to your appointment.

3 Day Food Diary Directions

Please record all food and drink, for 3 days, 2 weekdays and 1 day during the weekend. It is easiest to record correctly if recording is done directly after a meal or snack.

1. Describe the food accurately and give brand names if possible. For example: margarine (Blue Bonnet soft tub) 1 teaspoon levels with knife.
2. Please record any foods that state they are fortified with additional vitamin D or calcium.
3. State whether fruits and vegetables are fresh, canned (water pack, heavy or light syrup), cooked or frozen.
4. Record the amount of food eaten by using household measures such as cups, teaspoons, tablespoons, or weigh the food. For example: Whole milk $\frac{1}{2}$ cup or 4 ounces (oz) 2% cottage cheese or 4 level tablespoons.
5. For meat every oz is about the size of a match box. 3 oz is about the size of a deck of cards. Keep in mind the bone takes up space. For example: Broiled pork chop with bone = 3 ounces, bone weight is 1 ounce, so total weight of pork chop is 2 ounces.
6. Describe sandwiches in detail.
For example: Bologna sandwich: 2 slices of whole wheat bread, 1 slice (1 ounce) bologna, 1 level tablespoon Kraft Mayonnaise (lite or regular), 1 lettuce leaf, 1 slice (1 ounce) Processed cheese (Kraft)
7. Be sure to record amounts of additional foods served with cereals or desserts, etc.
For example: Cereal: $\frac{1}{2}$ cup Rice Krispies (Kellogg's), $\frac{1}{4}$ cup milk 2%, 2 level tablespoons Brown Sugar
8. Include how the food is prepared especially for meats, fish, poultry, eggs, and vegetables. Methods of preparation include boiling, roasting, baking, broiling, frying or steaming. When frying, be sure to mention the type of fat or oil used.
9. If eating out, describe food item well. Please record the name of popular fast food restaurants as we have nutrition information for all foods
10. Please include any vitamins and minerals you consume.



3 oz (75 g) cooked chicken
or meat (4 oz raw):
deck of cards



1 cup (250 ml) cooked rice,
pasta or ice cream:
tennis ball



1 oz (30 g) cheese:
4 dice or 1 domino



medium piece of fruit:
baseball



1 tsp (5 ml) butter or
margarine: one die



1 small baked potato:
a computer mouse



average woman's fist:
1 cup (250 ml)



2 tbsp (30 ml) peanut butter,
jam, salad dressing: golf ball



1 oz (30 g) of chocolate:
a packet of dental floss

<http://remakemyplate.com/resources-tips-and-tools/size-it-up-portion-sizes/>

3 Day Food Diary

Date: Example

Time	Food/drink eaten	How hungry before meal (1-5, 1=very hungry, 2=hungry, 3=neutral, 4=satisfied, 5= full)	Mood before meal	How hungry after meal (1-5, 1=very hungry, 2=hungry, 3=neutral, 4=satisfied, 5= full)	Mood after meal
8:15am	1 cup cereal, 1 cup 1% milk, 1 large banana, 1 cup coffee with 1 tsp sugar	1	tired	4	Slightly awake
10:30	Granola bar	3	bored	4	Slightly happy
12:30	Sandwich- 2 slice whole wheat bread, slice of American cheese, 2oz of lean ham deli meat, lettuce, tomato, 2 tbsp mayo 1 oz Doritos chips 1 small cookie ½ cup apple sauce 8 oz water	2	annoyed	5	happy
2:00	1 fun size snickers bar, 8 oz water	3	happy	3	happy
5:00	16 oz Gatorade	3	Bored	4	Bored
6:00	3 oz chicken breast, 1 cup mash potatoes, 1 tsp butter, ½ cup canned green beans, ½ cup corn, 1 cup apple juice	2	tired	5	neutral
7:00	6oz cup of flavored Greek yogurt	3	Happy	4	happy
Time	Physical Activity	How long	Intensity		
2:30	Ballet- Advance level	1hr 30 min	low		
4:30	Gym- weights lower body and back	45 min	high		

3 Day Food Diary

Date:

