

# Group Program Readiness & Clinical "Reveal" Worksheet

Client Name: \_\_\_\_\_ Date: \_\_ Cohort: \_\_\_\_\_

## Introduction

Welcome to your digital health journey! This worksheet is designed to help you navigate the **Reveal** and **Organize** phases of our program. By completing this, you provide your practitioner with the data needed to customize our live Clinical Q&A sessions to your specific needs.

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## Section 1: Digital Onboarding Checklist

*Ensure your "Tech Stack" is ready so you can focus on your health, not the software.*

- ☐ **LMS Access:** I have logged into the portal (Kajabi/Practice Better) and watched the "Welcome Video."
- ☐ **Telehealth Setup:** I have downloaded Zoom and tested my camera/microphone for live sessions.
- ☐ **Community Hub:** I have joined the private group and posted a brief introduction.
- ☐ **Notifications:** I have enabled "Drip Content" alerts so I don't miss new modules.

## Section 2: The "Reveal" (Clinical History)

*Functional Medicine looks at the R.O.O.T.S. of your health. Briefly identify your primary concerns.*

Health Node	Current Symptoms (1-10 Scale)	Primary Concern/Goal
<b>Assimilation</b> (Digestion, Gut)		
<b>Defense</b> (Immune, Inflammation)		
<b>Energy</b> (Mitochondria, Fatigue)		
<b>Biotransformation</b> (Detox)		

Health Node	Current Symptoms (1-10 Scale)	Primary Concern/Goal
<b>Communication</b> (Hormones, Mood)		
<b>Transport</b> (Cardio, Lymphatic)		
<b>Structural</b> (Bones, Muscles)		

### Section 3: The "Organize" Phase (Weekly Symptom Tracker)

Use this table to track your baseline before our first Live Clinical Q&A.

Symptom Category	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Energy Levels (1-10)							
Digestive Bloating (Y/N)							
Sleep Quality (1-10)							
Brain Fog (1-10)							

### Section 4: Reflection & Goal Setting

What is the #1 question you want addressed during our first Live Q&A?

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Which "Track" do you feel most aligned with? (Select one: ☐ The Gut Track | ☐ The Stress Track | ☐ The Metabolic Track)

Observations/Notes for your Coach:

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### Next Steps:

1. **Upload** this completed worksheet to your HIPAA-compliant portal.
2. **Review** Module 1 (Asynchronous) before our first live session.
3. **Mark your calendar** for the first Synchronous Live Clinical Q&A on: \_\_\_\_\_

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