Blossoming Lotus
Intake and Assessment
703-606-1698
Tia@BlossomingLotus.yoga

7/26/24
TCA 1 pg6

BASIC PERSONAL INFORMATION			Clinician ONLY
Name: TCA		Date: 07/26/2024	Preferred Name:
Age: 66	Gender Identity: male	Who referred you? ☑ Self ☐ Clinician: _____ ☐ Other: _____	Preferred Pronouns:
What major concerns do you wish to address through Yoga: ☑ Physical: _____ ☐ Emotional: _____ ☐ Mental: _____ ☐ Spiritual: _____ ☐ Relationship: _____ ☐ Other: _____	What are your three main goals* for yoga therapy: . Flexibility . Proper breathing . Patience	What is your intention** in seeking yoga therapy: To expand my horizon and better myself.	Notes:
YOGA PRACTICE BACKGROUND			Clinician ONLY
How long have you practiced? ☒ No experience – 0 years ☐ < 1 year ☐ 1-3 years ☐ 4-5 years ☐ 6-10 years ☐ >10 years	How often do you practice? ☒ Not applicable (N/A) ☐ < 1x per week ☐ 1-2x per week ☐ 3-4x per week ☐ >5x per week ☐ Other: _____	How long is each session on average? ☒ N/A ☐ 15-30 minutes ☐ 31 to 45 minutes ☐ 46 to 60 minutes ☐ 61 to 90 minutes ☐ Other: _____	Notes:
What is your favorite kind of yoga? ☐ Chair ☒ Gentle ☐ Power ☐ Other/N/A: _____	Where do you practice most? ☐ Yoga studio ☐ Fitness/Rec Center ☐ Home on my own ☐ Online ☐ Other/N/A: _____	Do you have other mind-body practices? e.g.,: ☐ Martial Arts ☒ Tai Qi ☐ Other/N/A: _____ ☐ Meditation _____	Likes/dislikes related to practice?

*Goal - desired outcome you wish to attain further into the future.

**Intention - chosen theme that allows you to create alignment in your life.

JCA 9806

Client: *Blossoming Lotus*

Circle how often you engage in the following yoga practices:				Goals for practice
• Aspiring to lead an ethical life	*Often*	*Sometimes* ✓	*Never*	
• Living in a nonviolent way	*Often*	*Sometimes* ✓	*Never*	
• Being truthful	*Often* ✓	*Sometimes*	*Never*	
• Not taking what is not freely offered to me	*Often*	*Sometimes* ✓	*Never*	
• Living in moderation	*Often*	*Sometimes* ✓	*Never*	
• Not being greedy	*Often*	*Sometimes* ✓	*Never*	
• Aspiring to lead a purposeful life	*Often* ✓	*Sometimes*	*Never*	
• Living with purity (eating healthy food or keeping a clean living space)	*Often*	*Sometimes* ✓	*Never*	
• Living with equanimity (remaining calm, not getting attached)	*Often*	*Sometimes* ✓	*Never*	
• Living with discipline (having a regular routine, sports or meditation)	*Often*	*Sometimes* ✓	*Never*	
• Living with introspection (paying attention to my thoughts and feelings)	*Often*	*Sometimes* ✓	*Never*	
• Living with purpose (dedicating myself to creating meaning)	*Often* ✓	*Sometimes*	*Never*	
• Aspiring to a life that honors the health and wellness of my body	*Often*	*Sometimes* ✓	*Never*	
• Posture (asana) practice	*Often*	*Sometimes* ✓	*Never*	
• Aspiring to a life in which mind and body connect	*Often*	*Sometimes* ✓	*Never*	
• Breathing practices	*Often*	*Sometimes*	*Never* ✓	would like to learn this
• Aspiring to a life of mindful introspection	*Often*	*Sometimes*	*Never* ✓	
• Becoming quiet and looking inward	*Often*	*Sometimes*	*Never* ✓	
• Avoiding too much stimulation	*Often*	*Sometimes* ✓	*Never*	
• Aspiring to a life of concentrated awareness	*Often*	*Sometimes*	*Never* ✓	
• Practices such as guided imagery or relaxation training	*Often*	*Sometimes*	*Never* ✓	
• Practices such as body scans or other body awareness exercises	*Often*	*Sometimes*	*Never* ✓	
• Aspiring to a life of meditative awareness	*Often*	*Sometimes*	*Never* ✓	
• Aspiring to a life that connects body, mind and spirit	*Often*	*Sometimes*	*Never* ✓	
• Sitting in meditation	*Often*	*Sometimes*	*Never* ✓	
• Walking in meditation	*Often*	*Sometimes*	*Never* ✓	
• Experiencing a connection to a greater whole—feeling complete	*Often*	*Sometimes*	*Never* ✓	

PHYSICAL HEALTH INFORMATION		CLINICIAN ONLY
Who is your primary care provider: Name: Address: 4/9 Contact Information:	If you do not have a PCP, would you like us to make a referral: ☐ Yes, please ☒ No, thank you ☐ Ask me later	Make PCP referral OR Obtain release of information as needed

- If you wish to share more:

tia@blossominglotus.yoga *1128 Fairway Dr NE, Vienna, VA 22180* *703-606-1698*

JCA 006

Client:

Blossoming Lotus

Blossoming Lotus

Are you struggling with any of the following:

- ☐ Addiction / alcohol / drugs
- ☐ Adrenal fatigue / illness
- ☐ Allergies
- ☐ Anxiety
- ☐ Arthritis
- ☐ Autoimmune disease
- ☐ Cancer
- ☐ Chronic Pain
- ☐ Dementia
- ☐ Depression
- ☐ Diabetes
- ☐ Digestive/gastrointestinal illness
- ☐ Eating disorder / anorexia / bulimia
- ☐ Head injury
- ☐ Heart disease
- ☑ High blood pressure
- ☑ High cholesterol
- ☐ HIV/AIDS
- ☐ Kidney disease
- ☐ Liver disease / hepatitis
- ☐ Lung disease / Asthma / COPD
- ☐ Menopause
- ☐ Musculoskeletal concern
- ☐ Movement Disorder
- ☐ Neurological disease
- ☐ Osteoporosis
- ☐ Schizophrenia
- ☐ Sciatica
- ☐ Skin problems
- ☐ Sleep problems
- ☐ Stroke
- ☐ Thyroid issues
- ☐ Vision problems / eye disease
- ☐ Weight concerns
- ☐ Other: _____

Have you had surgeries?
If yes, please describe, date

no

Have you been hospitalized?
If yes, please describe the reason, date, how long:

no

When was your last (approximately):

- ☑ Physical exam: April 24 2021
- ☑ Vision exam:
- ☑ Dental check-up: May 24
- ☐ Hearing test:
- ☐ Other:
- ☐ Other:

Have you had any injuries or accidents? no
Please list, date:

What medications are you currently taking:
(please list all; OPTIONAL: reason)

- ☑ Exforge HCT

What supplements (e.g., vitamins, minerals, herbs) are you currently taking:
(OPTIONAL: reason, dosage)

- ☑ Vitamin D + K
- ☑ Multivitamin

Follow up on all endorsed items

Ask about alcohol and smoking

- looking up causes dizziness
- prefers not to bend over, isn't flexible enough
- stiff
- getting up + down off floor is difficult for
- R leg Balance 9 sec
- L leg over 20 secs

Do you have limitations in physical activity level? If yes, please describe.

no

Explore if movement aggravates or relieves

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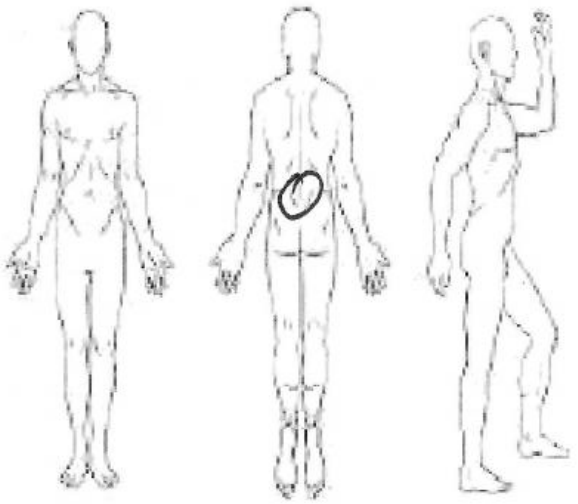
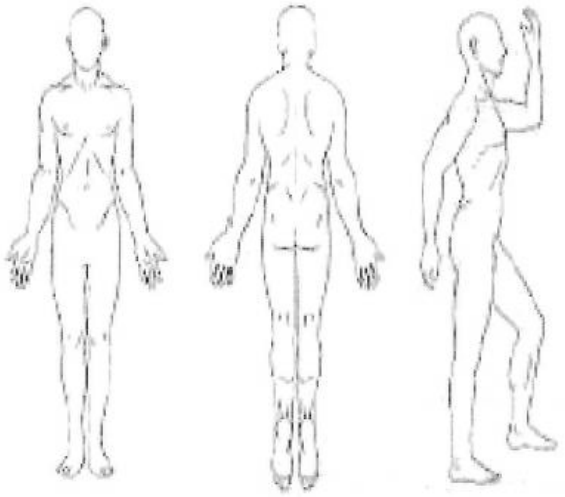
Client: *Blossoming Lotus*

Please mark where you currently experience ACUTE pain



Please mark where you experience CHRONIC pain *



Ask for pain rating from 1 to 10 for each indicated area: 2-3

walks it off

Explore if movement aggravates or relieves:

How is your sleep?
Wake-up time: 7.30 am
Do you use an alarm to wake: (yes) no
Bedtime: 10.00 pm
Do you fall asleep easily? (yes) no
Hours of uninterrupted sleep per night: 8
Do you feel tired upon waking? yes (no)

How much do you move every day?
How many hours do you sit each day (at work plus at home): 4 hours
lies down instead
Can you move as well as you would like? (yes) no

What types of exercise do you do: Walks almost every-day when not injured, 4 Swim.
N/A or

Type: Swim times per week: 1
minutes each time: 45

Type: Golf times per week: 0.5
minutes each time: 180 m

How is your nutrition (food and drink)?
Typical breakfast:
Eggs, bacon, avocado, roll

Typical lunch:
Sandwich

Typical dinner:
Fish, pasta, steak, Asian

Typical snacks (including when):
Chips pm

How much do you drink of each of the following/day:
Water: 32 ounces Regular soda: — oz
Diet soda: — oz Herbal tea: — oz
Coffee or black/green tea: ~~8~~ oz 16
Juice: 5 oz Alcohol: 5 oz
Other _____ oz; _____ oz
Additional information you wish to share:

Explore quality of sleep:

- ☐ Initial insomnia
- ☐ Middle insomnia
- ☐ Terminal insomnia
- ☐ Night terrors, sleep walking
- ☐ Other sleep disturbance

Follow up on any movement issues
normal

Explore exercise in more detail

Explore quality of nutrition – be sure ask about food AND drink
for vegans, vegetarians explore:

- ☐ protein sources
- ☐ b vitamin sources
- ☐ omega 3 sources

Note strengths - ~~they~~ prefers to walk on beach, relieve back tension/ pain

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** Extra space on last page.*

TCA 0906

Client: *Blossoming Lotus*

PSYCHOLOGICAL and EMOTIONAL INFORMATION

How would you describe your **temperament** (e.g., introverted, extroverted, outgoing, sociable, loner, intense, easy going, etc.)? outgoing, sociable, curious

Do you wish to share any mental health **concerns, symptoms, or diagnoses**? Please describe (extra space on last page)

none

Have you received **mental health therapy or counseling**? Where, when, how long, how often, N/A, don't wish to share?

no

Have you ever attempted or thought about suicide?	Yes	(No)	Don't wish to share
Have you ever attempted or thought about harming someone else?	Yes	(No)	Don't wish to share
Do you have a **history of mistreatment or abuse**? Please explain to the degree comfortable:	Yes	(No)	Don't wish to share

CLINICIAN ONLY

Follow up on diagnoses, symptoms including onset, frequency, duration, severity.

Assess duties (protect, warn, report)

Explore if mental health treatment has been received at PCH

Please check the best answer for each of the following items for the **PAST 7 DAYS:**	*Never*	*Rarely*	*Sometimes*	*Often*	*Always*
I felt fearful			✓		
I found it hard to focus on anything other than my anxiety		✓			
My worries overwhelmed me	✓				
I felt uneasy			✓		
I felt worthless	✓				
I felt helpless	✓				
I felt depressed	✓				
I felt hopeless	✓				

From PROMIS-29 v2.0

Conduct Mini MSE

Mood:
Affect:
Thought process:
Orientation * 3:
Other:

Are you experiencing stress in any of the following areas?
Please check all that apply:

☐ Chronic pain / illness / health	☐ Moving/Relocation
☑ Caretaking a child, elder, pet	☐ Partner relationship
☐ Discrimination / Bias	☐ School
☐ Divorce / Separation	☐ Sexuality / gender identity
☐ Economics / Money	☐ Sleep
☑ Family	☐ Substance use
☐ Grief / Death	☐ Traumatic event – nonpersonal
☐ Identity	☐ Traumatic event – personal
☐ Loss (e.g., job, home)	☐ Work
☐ Nutrition / Food	☐ Other: Legal

* How well are you able to **cope with stress**? very well

What do you typically do when stressed? pace, think

What do you do that helps you cope? positive attitude

What do you do that gets in the way? become nervous

Follow up on all checked items

Note strengths - problem solving

→ adult child w/ MH issues, doesn't handle "irrational" behavior

→ other adult daughter - same

- family"

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* Extra space on last page.

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SOCIAL, SOCIETAL, and SOCIOECONOMIC INFORMATION

CLINICIAN ONLY

What is your highest **educational level?**

- ☐ Less than high school
- ☐ High school / GED
- ☐ Some college no degree
- ☐ Associate degree
- ☐ Baccalaureate degree
- ☑ Masters degree Law
- ☐ Doctoral degree
- ☐ Other:

What was your degree major: Law

What is your current **employment?**

- ☐ Unemployed Retired
- ☐ Employed – Self

Job title: Consultant

Where: USA/overseas Europe

How long: 10 yrs

Hours worked per day: varies

Sedentary or mobile?

If you have a partner, are they employed? (Yes) No

How is your **work-life balance?** very Good 1 · 2 · 3 · 4 (5)

Do you work too much?
Not at all somewhat quite a bit a lot

How much do you enjoy your work?
Not at all somewhat quite a bit a lot

How stressful is your work?
Not at all somewhat quite a bit a lot

Does work leave enough family time?
Not at all somewhat quite a bit a lot

Explore impact on physical and mental health

allows for a balanced lifestyle

Describe your **social support network:** Do you have:

- ☑ Close friends; how many: > 10 (more than)
- ☑ Casual friends /social friendships
- ☑ Work / peer relationships
- ☑ Positive immediate family relationships
- ☐ Meaningful extended family relationships
- ☐ Community supports (e.g., via church, clubs)

Describe your **home environment:**

Do you rent or own? varies

How many people live with you in your home: 2

What is the quality of your home? very good

Describe your **neighborhood:** urban

Have you ever experienced any of the following **socioeconomic challenges?**	*Yes, at current*	*Yes, in the past*	*No, never*
No income		✓	
Poverty level income			✓
Homelessness			✓
Food insecurity			✓
Economic / financial deprivation			✓
Unsafe neighborhood			✓
Oppression because of your socioeconomic status			✓
Other:			
Have you ever experienced any of the following sociopolitical or legal circumstances?	*Yes, at current*	*Yes, in the past*	*No, never*
Immigration concerns	✓		
Exposure to a polluted environment /toxins			✓
Engaged in political activism			✓
Engaged in criminal activity			✓
Been a victim of criminal activity			✓
Other:			✓

Follow up on any endorsed items (if none, inquire)

very immigration - recent development that is a great concern

Note strengths

TCA 0806

Client:

Blossoming Lotus

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CULTURAL and FAMILIAL INFORMATION						CLINICIAN ONLY
Please check the best answer for each of the following **cultural and family experiences** based on the present moment:	*Never*	*Rarely*	*Sometimes*	*Often*	*Always*	
I feel a strong sense of cultural or community belonging based on common beliefs and values		✓				Follow up on all endorsed items; if none, inquire
I embrace important spiritual/religious beliefs, ethics, and morals	✓					
I feel strong emotional ties to a cultural or community group	✓					
I have experienced prejudice, bias, or oppression because of my cultural or community group memberships	✓					Explore family dynamics (relationships across generations, behavioral patterns, shared values, attachment styles)
I have experienced rejection, stigma, or ostracism	✓					
I experience intergenerationally transmitted / historical trauma	✓					
I experience strong emotional ties to a significant other		✓				
I experience strong emotional ties to my immediate family					✓	Explore family structure (stability, cohesiveness, divisiveness, closeness, distance, and boundaries)
I experience strong emotional ties to my extended family	✓					
I experience conflict in some of my family relationships			✓			
My family holds strong shared values and beliefs			✓			

What are your most important life values? tolerance, open mindedness Where did you learn or develop these? from my mother	What are your spiritual or religious beliefs? none Where did you learn or develop these? —	What is your most important community or cultural group? none How engaged in or isolated from this group are you? —

Explore family communication styles

What are your hobbies, interests, and typical recreational activities?

music, golf, travel, history and general knowledge

What do you like most about the community or cultural groups to which you belong?

n/a

What do you like most about your family?

Their loving attitudes, that they care

What do you like most about yourself?

My intelligence

What else should we know about you?

I'm an aquarius

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TCA 006

Client: *Blossoming Lotus*

Blossoming Lotus

CLINICIAN ONLY – Behavioral Observations

Alignment (make notes as needed)

- ☐ Ears over shoulder
- ☑ Shoulders forward or backward
- ☐ Shoulders align over hips
- ☐ Upper back hunched (kyphosis)
- ☐ Shoulders collapsed
- ☐ Knee over ankles
- ☐ Ear over ankles
- ☐ Accentuated lower lumbar (lordosis)
- ☐ Feet straight
- ☐ Knees caps forward
- ☐ Hips rotation
- ☐ Pelvis anterior or posterior rotation
- ☐ Shoulders / clavicles even — R lower than L
- ☐ Hyperextension in joints

Challenges Noted In (make notes as needed):

- ☑ Balance — work on this
- ☐ Endurance — swimming yes
- ☐ Flexibility — poor to mediocre
- ☐ Gait — long, feet turned outward
- ☐ Posture — good
- ☐ Strength — good

Strengths Noted In (make notes as needed):

- ☐ Balance
- ☑ Endurance w/ swimming
- ☐ Flexibility
- ☐ Gait
- ☑ Posture
- ☑ Strength

CLINICIAN ONLY

Notes:

L anklip internally rotates

-

slight non-alignment

CLINICIAN ONLY – Information to Review with the Client

CLINICIAN ONLY

- ☑ The studio provides all necessary props, but you are welcome to bring your own mat.
- ☑ Discuss dates and times of the class (Ex: Mondays at 6pm, starting 10/30/2022)
- ☑ Emphasize that clients need to make an effort to be at all 8 sessions; it is an 8 week commitment. Ask clients to come 15-20 min early for the first session to fill out paperwork, and 5 min early before each class after that.
  - ☐ What would make it harder for you to attend the class? (i.e. Barriers): _____
  - ☐ What would make it easier for you to attend the class? (i.e. Facilitators): _____
- ☑ Discuss format of the class: introductory talk/discussion about yoga philosophy, breathing practice, physical practice. Inform clients that while they are not required to participate in the discussion, it is going to be a regular component of the sessions.
- ☑ Voluntary adjustments are offered by the therapists; all hands-on work is very light and respectful. If you prefer not to be touched, please let us know. We can make verbal adjustments that do not require hands on your body. Adjustments are given in a spirit of support and offering a more healthful way- there is no wrong way to do yoga!
- ☑ Physical Adjustments? (Y/N): _____
- ☑ We will offer many modifications using props (e.g. blocks, straps); please be true to yourself and to your body. If something feels wrong, do NOT do it.
- ☑ Feel free to ask questions about anything we do either before, after, and/or during class
- ☑ Yoga is best practiced in comfortable clothes that will allow for stretching, as well as coverage throughout the class (e.g. clothes that do not slip).
- ☑ Yoga is best practiced on a relatively empty stomach, but not starving (a light snack prior to class will help you maintain your energy without being too full). Please refrain from eating heavy meals 2-3 hours before practice.
- ☐ Also, we ask that if you have any medical conditions that may affect your yoga practice, you let us know, so that we can help you with modifying poses for particular reasons.
- ☑ Please come a few minutes early to give yourself time to settle in on your mat.

- ☐ There will be space in the corner of the room to store your personal belongings.
- ☐ Please turn off all cell phones before you settle in for class and remove any jewelry that may interfere with your practice.

THIS SPACE IS LEFT FOR YOU TO SHARE MORE! Please add anything you'd like here. For example, explain about your pain, coping strategies, etc.