

What's Up Doc?

The New Functional Assessment

A Comprehensive, yet simple and easy to use Nutritional Evaluation Tool

This month we introduce the new **Functional Assessment**.

The Functional Assessment is a structured, body-systems-based symptom evaluation tool designed specifically for holistic health practitioners and their patients. It provides a clinically meaningful, pathway from patient-reported symptoms to targeted nutritional support — bridging the gap between what a patient is experiencing and what they may need to address the underlying physiological imbalances driving those experiences.

The Functional Assessment has been developed across 40 categories organized into 12 body systems plus special conditions. The Functional Assessment has been guided by a core principle of functional and naturopathic medicine. Symptoms sharing the same nutritional or physiological root cause should be evaluated together, because the clinical response is the same regardless of which individual symptom presents.

The Clinical Need This Tool Addresses

Holistic and integrative practitioners face a challenge that conventional medicine does not: they are tasked with understanding the whole person — not a single organ system, a single diagnosis, or a single complaint. Patients who seek holistic care often present with multiple, interconnected symptoms across several body systems. A questionnaire that evaluates only one area at a time fails this patient population entirely. Symptom-based assessment tools have a well-established role in functional medicine.

The Medical Symptoms Questionnaire (MSQ), developed and used by the **Institute for Functional Medicine (IFM)** for over 20 years, demonstrates that scoring symptom frequency and severity across multiple body systems provides Practitioners with a rapid, high-level review of key body functions and a quantifiable measure of overall symptom burden. The System Survey used by Practitioners and available in numerous forms offers a similar though more cumbersome approach

The Functional Assessment builds on this established framework while solving a significant practical limitation: most multi-system questionnaires are too long for routine clinical use. Many at 200+ questions, result in patient fatigue and are either not completed or often an incomplete response is supplied which simply undermines the quality of data collected.

The Functional Assessment has 40 questions covering 40 precise categories — covering the same clinical territory of older questionnaires, in a format patients can complete comfortably in 5 or 6 minutes.

Benefits for the Holistic Practitioner

Clinical Efficiency

Replaces time consuming, repetitive and onerous questionnaires, with clinically mapped categories — covering the same ground in a fraction of the time

Scoring arrives before the consultation begins, allowing the practitioner to focus immediately on priority areas rather than administering the form during the appointment.

The 1–3 severity scale creates an instant triage layer — score 3 categories are addressed first, providing a logical, defensible clinical priority framework

Consistency and Reproducibility

Standardized category language ensures consistent data collection across all patients and appointments

Re-administration at follow-up visits produces directly comparable scores — tracking whether symptom burden is reducing over time

The School of Applied Functional Medicine notes that progressive improvement in overall MSQ-style scores is clinically valuable for maintaining patient engagement, particularly when individual symptoms have not yet fully resolved

Integrated Nutritional Guidance

Each of the 40 categories maps directly to a Nutritional Support Key — eliminating the need for the practitioner to recall from memory which products address which symptom clusters

Use of the accompanying app flags products that appear across multiple categories, highlighting priority products that address several concerns simultaneously — reducing protocol complexity for both practitioner and patient

This connected structure supports what the Institute for Functional Medicine describes as a systems-biology approach: identifying which nutritional interventions have the broadest positive impact across the patient's specific pattern of imbalance

Professional Presentation

Available in both a printable PDF and a fully interactive online version, adaptable to in-office or remote patient intake workflows

The practitioner-only view ensures sensitive supplement recommendations remain private to the clinical relationship

Benefits for the Patient

Patients who seek holistic care are often carrying a significant and complex symptom burden that has not been adequately addressed by conventional medicine. Many have seen multiple providers without resolution. What they need — and frequently have not experienced — is a practitioner who listens comprehensively and responds to the whole picture of their health.

Feeling Heard and Seen



The act of completing a comprehensive symptom evaluation sends a clear message: you the practitioner is interested in all of what the patient is experiencing, not just the presenting complaint. **Research published by Cleveland Clinic's functional medicine department** confirms that the experience of a practitioner taking a comprehensive health timeline and lifestyle assessment is itself therapeutically significant, building patient confidence and engagement.

Clarity and Personalization

The body-systems framework helps patients make sense of seemingly unrelated symptoms. A patient who comes in for digestive complaints may score highly in the nervous system and endocrine categories — and the Functional Assessment makes this systemic picture visible in a way that a single-complaint consultation cannot. This mirrors the functional medicine principle articulated by the IFM: nutritional imbalances are potential contributors to poor health across multiple systems simultaneously, and identifying these patterns enables personalized, targeted intervention.

Progress Patients Can See

One of the most clinically underused benefits of any symptom questionnaire is serial administration — repeating the assessment at follow-up visits and comparing scores over time. *Endometriosis.net* describes the MSQ as "another lens through which to view health," with the total score providing a meaningful composite measure of overall improvement — particularly valuable when individual symptoms are improving slowly and patients need tangible evidence of progress to sustain motivation.

The Functional Assessment is designed to serve this function at every stage of the patient relationship: as an intake tool at the first visit, a monitoring tool at follow-up, and a re-engagement tool when clinical priorities shift.

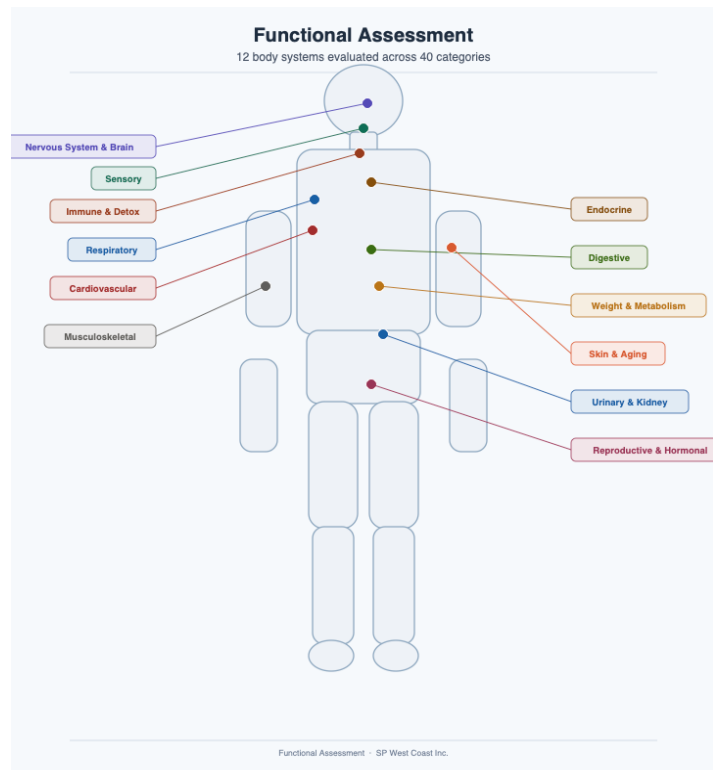
How the Assessment Works

The patient completes only the questions where there is a concern, rating the relevant symptom category on a scale of 1 to 3, where 1 indicates a mild or infrequent concern, 2 indicates a

moderate concern, and 3 indicates a severe or highly frequent concern. Categories not relevant to the patient are left blank. The practitioner then reviews scored categories in the Practitioner View, sorted by severity, alongside the corresponding nutritional support recommendations. The product solutions are listed in the order, of most relevant and numerous products are listed. The Practitioner can select in the order they are listed or choose from the list based upon their own expertise, or products which support more than one Patient concern. Both the nutritional key and the App gives the Practitioner references from which they can either simply follow recommendations or build their own protocols.

The 12 Body Systems Covered & Special Conditions

- Immune & Detox
- Digestive
- Cardiovascular
- Musculoskeletal
- Nervous System & Brain
- Endocrine
- Reproductive & Hormonal
- Respiratory
- Sensory
- Weight & Metabolism
- Skin & Aging
- Urinary & Kidney
- Special Conditions



Does it Work, Do we need it?

Traditionally Symptom Survey or System Surveys have been unwieldy lists of 200 or more symptoms as separate line items. The biggest drawback with this is compliance, it proved difficult and time consuming for both Practitioners and Patients even in an online format.

This new Functional Assessment is guided by the functional medicine principle: **symptoms that share the same nutritional or physiological root cause should be grouped together**, because the clinical response is the same regardless of which individual symptom present themselves. In grouping the symptoms together, **we have looked at the functional body system and the nutritional pathway which is impacted. Symptoms were not grouped by how they feel to the patient, but rather by the root cause or body system affected.**

So as an example, Leg cramps, muscle cramps at night, weak nails, restless leg, and growing pains all point to the same deficiency pattern — **magnesium and calcium metabolism**.

Many of the original 200+ line items in these older surveys were clinical synonyms or overlapping presentations of the same condition.

So, for example questions such as

"Fatigue after exertion" *"general/severe exhaustion"* and *"chronically fatigued"* all point to our **Sleep & Fatigue**

"Frequently ill," "low disease resistance," "recurring colds" lead us to **Infection Resistance**

"Mood swings," "melancholia," "apathy," "feeling low" → merge into **Depression & Mood**

"Hot flashes," "night sweats," "menopausal concerns," "vaginal dryness" are all indicators to consider **Female Hormonal Health**

However, where different symptoms in the same body system require meaningfully different nutritional support, we have kept these as separate categories, **Heart & Circulation** was kept separate from **Blood Pressure & Cholesterol** as the protocols are distinct

Every consolidated category has been tested against numerous surveys including the 220-question System Survey to confirm that:

1. Every symptom in the group is addressed by the recommended products
2. No clinically important symptoms are missing meaning no changes in recommendations are noted when Patients have completed both assessments
3. Each category in the Functional Assessment is specific enough that you can make a confident product decision from it

If a symptom cluster produced a unique product recommendation not covered elsewhere, it was kept as its own category rather than absorbed into another

The Functional Assessment gives **100% of the clinical information** needed to generate a nutritional support recommendation, while reducing patient completion time from approximately 25–35 minutes to **5 or 6 minutes**. The scoring system (1 = mild, 2 = moderate, 3 = severe) adds a further layer of clinical prioritization allowing you to immediately focus on the highest-burden areas rather than treating all flagged symptoms equally. Products in the Nutritional key are listed by priority and provides an excellent foundation to base recommendations alongside your own clinical expertise and other information gathered from the Patient. As a rule of thumb Doctors Research doses are 3 per day, Colicron and Colicron BB one per day and Colicron Duo one tablet AM one Capsule PM. Dosing can be increased and reduced based on your own findings. If you use the APP version of the Functional Assessment, products which are duplicated across symptoms or body systems will be highlighted to enable you to select products which offer your Patient, the most support.

The Product solutions use Food Research and Colicron Products. If using the APP once the Patient hits submit the Practitioner can enter the "Practitioner View " at the top of the Assessment for Product recommendations.

Availability

During this introductory period the Functional Assessment will be available free of charge to all Solely Practitioner accounts in Southern California, Central California, Greater Las Vegas and all registered Alivada Labs (Colicron) accounts. The Functional Assessment is available to non-Solely Practitioner accounts for a one-time fee of \$39.00.

The Functional Assessment is available in two formats to accommodate different practice workflows:

PDF (printable): A clean two-page patient questionnaire and separate Nutritional Support Key for in-office use. No digital infrastructure required.

Interactive HTML Application: A browser-based app with Patient Form and Practitioner View tabs. Includes automatic severity sorting, priority product detection across flagged categories, and a Full Nutritional Key reference tab. This version can be used in-office with no data storage negating the need for HIPAA compliance or deployed online through a HIPAA-compliant platform for remote patient intake.

With both versions of the Functional Assessment, you will receive documentation as to how you can use both the **PDF and APP versions with and without HIPAA compliance.**

If you decide to use online, we supply instructions recommendations such as “Google Workspace for Healthcare”, and “JotForm HIPAA” which for a small monthly fee starting at as little as \$12 per month will fully take care of your HIPAA obligations

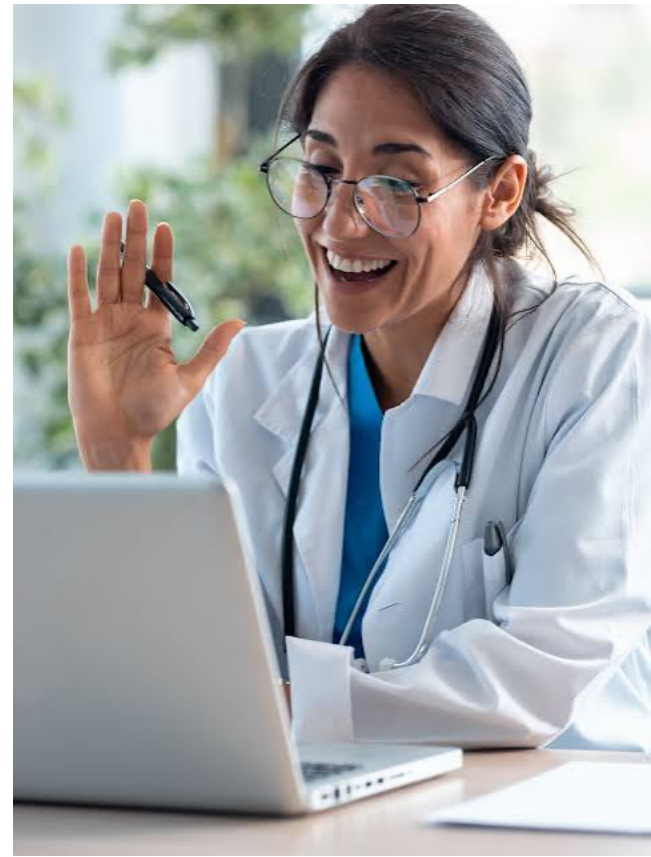
To register and receive your copy of the **Functional Assessment** please email

morgan@solelypractitioner.com or visit www.solelypractitioner.com

References

1. Institute for Functional Medicine (IFM). Medical Symptoms Questionnaire (MSQ). Used clinically for over 20 years as a multi-system symptom burden assessment tool. ifm.org
2. Institute for Functional Medicine. "The Power of Functional Nutrition." ifm.org/articles/power-functional-nutrition-2
3. School of Applied Functional Medicine. "MSQ: Critical Tool for Clients and Practitioners Alike." schoolafm.com
4. Cleveland Clinic, Department of Wellness and Preventive Medicine. "What is Functional Medicine?" my.clevelandclinic.org/departments/functional-medicine
5. Endometriosis.net. "Tracking Your Medical Symptom Questionnaire Score." endometriosis.net/living/track-msq
6. Zentake. "Medical Symptoms Questionnaire (MSQ) Template." zentake.com
7. National Institutes of Health (PMC). "LIFEHOUSE's Functional Nutrition Examination." 2023. pmc.ncbi.nlm.nih.gov/articles/PMC10145881
8. Optimantra. "Track Functional Medicine Outcomes with Digital Tools." optimantra.com
9. Hacker K. "The Burden of Chronic Disease." *Mayo Clinic Proceedings: Innovations, Quality & Outcomes.* 2024;8(1):112–119. doi:10.1016/j.mayocpiqo.2023.08.005

Disclaimer: The Functional Assessment is an educational and clinical support tool. It is not intended to diagnose, treat, cure, or prevent any disease or medical condition. Nutritional support recommendations should be reviewed by a qualified health professional in the context of the individual patient's complete health history, current medications, allergies, and clinical presentation. This assessment is independent of the IFM and has not been endorsed or approved by IFM



Why you Need It?

The Functional Assessment transforms your first patient interaction. In 5 or 6 minutes you have a scored, systems-wide picture of everything your patient is experiencing — not just what they came in for. The severity scoring surfaces your priorities instantly, the integrated Nutritional Support Key puts targeted product recommendations at your fingertips before the consultation even begins, and re-administering at follow-up visits gives you objective evidence of progress that keeps patients engaged and committed to their care. It is the simplest way to practice smarter, move faster, and deliver better outcomes from day one.

Regardless of any existing modalities you are currently using be that blood panels, muscle testing, or different forms of energy work the Functional Assessment will add to your analysis and Patient retention. The Functional Assessment will strengthen your initial Patient enrollment make it more complete and likely speed it up

Functional Assessment

Patient FormPractitioner View4Full Nutritional Key

PATIENT	DATE	AGE	GENDER	WEIGHT	HEIGHT
Jane Doe	2026-07-19	45	Female	145lbs	5'4"

Categories flagged
4

Severe (score 3)
2

Moderate (score 2)
1

Mild (score 1)
1

All scoredSevere (3)Moderate (2)Mild (1)

★ Priority products — these appear across multiple flagged categories, suggesting they may address several concerns at once:

Colicron x4CoQ10-Cardio x2Vitamin-Mineral x2

10

Blood Pressure & Cholesterol
Suggested support: Cardio-Power, CoQ10-Cardio, Cholester-Right, Nattokinase, Colicron, Simply Cardio

Severe

21

Blood Sugar & Diabetes
Suggested support: Gluco-Sugar-Balance, Mineral Tran, Vitamin-Mineral, Colicron, Land and Sea Minerals

Severe

23

Female Hormonal Health
Suggested support: Simply Female, Le Feminine Advantage, Simply Ovary, Simply Uterus, Colicron, Libida-Life, Cal-Mag Complex

Moderate

36

Aging & Longevity
Suggested support: Herbal Antioxidant, Selenium E, CoQ10-Cardio, Complete Brain Health, Omega-3 EPA/DHA, Vitamin-Mineral, Colicron

Mild

OUR MISSION

Doctors' Research is dedicated to providing the safest, the best, and the most effective **100% FOOD** nutrient supplements available only through health care professionals.

Doctors' Research, Inc.

Nutrition from Food!



WE are COMMITTED to:



100% FOOD nutrient supplements with naturally occurring enzymes, protein chaperones, peptides, and supporting co-factors.



Superior glandular sourcing from pasture-raised cows in Australia, Argentina, and New Zealand.

- » Never incorporating USP synthetic vitamins, inorganic minerals, porcine, or shellfish
- » Third party testing for quality & purity including heavy metals.
- » Selling only through Healthcare Professionals, not Amazon or any Major Retailers.
- » Offering Online Ordering Portals with Direct-to-Patient and Shopify Collective.



DOCTORS' RESEARCH

PHONE: (805) 489-7185 • 1036 W. GRAND AVENUE, GROVER BEACH, CALIFORNIA 93433 • WWW.DOCTORSRESEARCH.COM