

DEEPER THAN SYMPTOMS

GETTING STARTED

Functional Medicine First Appointment Checklist

What to bring, what to write down, and what to ask — so your first visit becomes the turning point it's meant to be.

Inside this checklist

A printable document checklist, a decade-by-decade timeline builder, the six questions worth asking, and the quiet mistakes that sabotage a good first appointment.

A free resource from

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Why Preparation Is Part of the Treatment

In a conventional 15-minute visit, the doctor drives. Functional medicine flips that — *you* bring the clues. Your timeline, your old labs, the supplement you've taken for years, the gut issues that started after a round of antibiotics. When the system loses track of these (and it usually does), your new provider starts blind.

The core principle

Your appointment is only as good as the information you bring. Preparation isn't busywork — it's the first real step of your healing.

What to Bring — Document Checklist

Pull these together a few days ahead. Your old labs are the single highest-value item — functional practitioners re-read them against optimal ranges, not just standard ones.

- **Past medical records & all recent lab results** — bloodwork, imaging, biopsies, hospital summaries. Even “normal” labs.
- **A complete medication list** — name, dose, and how long you've been on each.
- **Every supplement you take** — bring the actual bottles or photograph the labels (brand, dose, and form matter).
- **Insurance info & prior diagnoses** — note which were confirmed by testing vs. an educated guess.
- **A 1–2 week symptom journal** — energy, digestion, sleep, mood, and pain.
- **Family health history** — especially autoimmune, thyroid, cardiovascular, or metabolic conditions.
- **A written health-history timeline** (see next page).
- **A short list of questions** (see page 4).

Build Your Health History Timeline

This is the single most clarifying thing you can prepare. Work through your life decade by decade and write down major illnesses, surgeries, infections, injuries, big stress events, antibiotic courses, dietary changes, and when symptoms first appeared. A timeline makes invisible links visible — the way three “unrelated” complaints can all trace back to one gut infection eighteen months earlier.

Timeline prompts — for each decade, note:

Major illnesses or diagnoses • surgeries or hospitalizations • serious infections • courses of antibiotics • significant stress (loss, divorce, burnout) • diet or weight changes • new medications • and **when each current symptom first started.**

Questions to Ask Your Practitioner

- Based on my history, what root causes are you looking at first?
- What functional lab tests will we run — and what is each one looking for?
- How do you tell the difference between a “normal” result and an *optimal* one?
- What does a realistic timeline for improvement look like for someone in my situation?
- How will we track progress, and how often will we check in?
- **What can I start doing right now — with food, sleep, or stress — while we wait on results?**

What to Expect & Mistakes to Avoid

Before: budget 30–60 minutes for intake forms — it’s part of your appointment. **During:** expect a 60–90 minute walk through your full timeline. **Wrapping up:** you’ll likely leave with a testing plan and initial steps, not a finished diagnosis.

Don’t sabotage a good first visit

Leaving labs at home because you assume they’re “all normal” • editing your own story or minimizing symptoms • forgetting supplements and OTC habits (that daily ibuprofen counts) • expecting all the answers on day one. Real root-cause work is iterative.

Your next step

Print this checklist and tick off each item before your visit — so nothing important gets left behind. Full guide at deeperthansymptoms.com.