

NEW CLIENT QUESTIONNAIRE LOCAL 2021

This helps me tailor your plan to you
Just ignore the questions that don't apply to you.
The following are the things I need to know. You can elaborate on anything you want.
Believe me, I've seen and heard everything and done a lot myself. :)

Face to face is still on hold due to the pandemic but I can still work with you remotely during this time but I have worked remotely with people for 28 years so I am very used to it.

Email this back to me at lisa@lisamerrill.com or

You can fax it to me too 1-877-287-7216

TEXT OR CALL ME THE SECOND YOU SEND IT SO I HAVE A HEADS UP

My cell number is 734-502-8264 (Verizon if that matters)

I am a texting queen too. ☺

FEES for "face to face" session

1 hour (meal plan set up, support materials and phone session) \$100

1.5 hours (more extensive and more phone time) \$150

2 hours (reserved for when we meet face to face again) \$175

MEDICARE covers diabetes sessions- even remote ones right now!!!

And MESSA is very good about covering all sessions

FLEX SPENDING and HEALTH SAVINGS ACCOUNTS can be used too

Installments are totally fine for tight budgets- just let me know ahead of time. Believe me I understand! I have started over from scratch a few times in my life too ☺

For continuous support- If you want to send me daily food diaries \$15/month

Or \$15-25 for meal plan updates after the initial set up time

\$25-35 for phone sessions after the initial set up time

For quickie emails and texts and "how do I count this" type of things I don't charge for but most people pop \$15-25 on paypal after they feel they have asked quite a bit.

I have paypal, venmo, zelle accounts, and checks & credit/debit cards are fine too.

My accounts are my email LISA@LISAMERRILL.COM (don't forget the 2 R's and 2L's)

Or my cell 734-502-8264. If you want to pay by check, I can text you my home address or you can send to my Wyandotte office.

I agree to these fees _____ (initial and date here)

NAME AND WHAT YOU PREFER TO BE CALLED IF IT'S DIFFERENT

ADDRESS

PREFERED EMAIL ADDRESS

PHONE

DO YOU TEXT?

ABOUT YOU

- Any “story” or history that you think is important that I should know and help me get to know and understand you better. You can include weigh history, life altering events, any gastric bypass/sleeve surgery etc

- Age
- Height
- Weight/size
- Where you want to be, if you're not there yet. And if you don't know we can always come up with something and re-negotiate it later

Anything I need to know about your job, your schedule, kids, etc

MEAL PLAN

- Do you want 3 meals and 3 snacks
- Or just 3 meals
- Or any combination

- What time do you normally eat your meals?

- What is your current plan if you have one?

- What do you like about it, or want to change?
- What foods do you currently plug in to this plan?

- Any food allergies?

- What are your trigger foods/what is NOT safe?

- What are your favorite (non trigger) foods?

- What non trigger foods do you hate? (so I won't keep mentioning them!)

- Any cultural situations I need to take into account? (ie Jewish/Observant)
Or vegan, vegetarian (what kind- lacto, ovo, pesca)

- Is it "safe" for you to know your calorie level or do you want me to keep this to myself? You won't be counting calories or anything, that's my job. I have a form that shows my calculations that I put in packs OR DON'T put in the packs if it's not healthy for you to know. _____
(people who answer "don't know" I don't tell..... for now)

MEDICAL HISTORY

- Anything medically I should know that wasn't mentioned initially?
- Medications?

EXERCISE (let me know what you do even if you're not having me do the exercise assessment, I need to know so I make sure your calories are appropriate based on your activity). If I am doing the assessment please be detailed.

- Any orthopedic limitations to exercise or medical issues?
- What do you like to do?
- What do you not like to do?
- Have access to at a gym or home gym?
- Wish to learn?
- Anything else you have an opinion on (exercise or not...I've had some funny things written here!!!! I love it!)
- Any "deal breakers" (example- vegan, or "gotta have my creamer in my coffee or a cup of nut milk for tea during the day")

Thank you!!!! Looking forward to working with you
Lisa

