



Discovery Checklist

Please check any/all that apply. **COMPLETE** this paperwork **FULLY** & **LEGIBLY** for best analysis and plan tailored to your needs.

Name: _____

Today's Date: _____

DOB: _____

Age: _____

Were you referred by someone? _____

Would you like us to communicate with your doctor? Yes / No

Dr. Name: _____

Dr. Email: _____

Where do you live? This helps us know if we have a provider / partner in your area. _____

Infancy/Early Childhood

- ☐ Difficulty nursing or used a nipple shield
- ☐ Fell asleep while nursing or needed to nurse frequently
- ☐ Bottle-fed more than 50% of the time
- ☐ Had trouble with (or medicated for) reflux
- ☐ Colic symptoms or inconsolable crying; unhappy
- ☐ Spit up often
- ☐ Gassy
- ☐ Messy feeding
- ☐ Chronic congestion
- ☐ Gagging /choking /coughing when eating
- ☐ Noisy / mouth breathing
- ☐ Multiple ear infections
- ☐ Tubes placed
- ☐ Difficulty transitioning to solid foods
- ☐ Other: _____

Airway / Breathing Concerns

- ☐ Asthma or any other breathing condition

- ☐ Allergies
- ☐ Dry, chapped lips
- ☐ Chronic congestion, unmedicated
- ☐ Chronic congestion, medicated
- ☐ Deviated septum
- ☐ Nasal surgery completed, details

- ☐ Nasal surgery recommended, details

- ☐ Tonsils removed
- ☐ Adenoid removed
- ☐ Tonsils enlarged
- ☐ Estimated % of **daytime** NASAL breathing? _____
- ☐ Estimated % of **nighttime** NASAL breathing? _____
- ☐ Trouble catching breath
- ☐ Over breathing/sighing
- ☐ Other: _____

Oral Resting Posture

- ☐ Full tongue rests on the roof of the mouth
- ☐ Full tongue rests in the middle of the mouth
- ☐ Full tongue rests on the floor of the mouth
- ☐ The tongue pushes on teeth
- ☐ Resting mouth posture is mouth closed with lips completely sealed
- ☐ Resting mouth posture is mouth closed with lips **MOSTLY** sealed
- ☐ Resting mouth posture is mouth open and lips open
- ☐ The lips are unable to close
- ☐ Other: _____

Digestive / Eating Behaviors / Chewing / Swallowing

- ☐ Frequent digestive issues
- ☐ Reflux: unmedicated
- ☐ Reflux: medicated
- ☐ Bloating
- ☐ Burping
- ☐ Hiccups
- ☐ Gas
- ☐ Constipation
- ☐ Slow, adequate chewing on BOTH sides of the mouth
- ☐ Poor, quick chewing or chewing on one side of the mouth
- ☐ Slow eating behaviors because eating is a chore
- ☐ Rapid eating behaviors because I am in a hurry to swallow
- ☐ Tongue thrusts forward during swallowing
- ☐ The back of the tongue does not lift during swallowing
- ☐ Difficulty with breathing while eating
- ☐ Open mouth chewing
- ☐ Use of liquids to swallow
- ☐ Difficulty swallowing pills
- ☐ Strong gag reflex
- ☐ Picky with textures
- ☐ Choking
- ☐ Prefer soft /easy to chew foods
- ☐ Eustachian tube concerns?
- ☐ Other: _____

Tongue-Tie History

- ☐ Lingual frenectomy as a baby
- ☐ Family members with tongue-ties
- ☐ Tongue-tie previously diagnosed by: _____
- ☐ Labial / buccal tie suspected
- ☐ Previous frenectomy? When? _____
- ☐ Previous myofunctional therapy? When? _____

Sucking / Toxic Oral Habits

- ☐ Thumb / finger sucking
- ☐ Prolonged pacifier use
- ☐ Another habit: _____

Dental / Orthodontic History

- ☐ For children under 18, age of first orthodontic exam?

- ☐ Previous orthodontic treatment, when?

- ☐ Experiencing orthodontic relapse
- ☐ Previous cervical headgear
- ☐ Previous expansion completed, when?

- ☐ Expansion recommended
- ☐ High, narrow palate (roof of mouth)
- ☐ Dental crowding
- ☐ Permanent teeth extracted (other than wisdom teeth)
- ☐ Wisdom teeth extracted
- ☐ Using an oral appliance
- ☐ Tongue crib or past habit corrector
- ☐ Past jaw surgery, when?

- ☐ Recommended jaw surgery
- ☐ High decay (cavity) rate
- ☐ Cannot reach the back molars with the tip of the tongue
- ☐ Small, recessed jaw

Speech

- ☐ History of speech therapy
- ☐ Trouble with certain sounds, which ones?

- ☐ Difficulty speaking fast
- ☐ Speech delay
- ☐ Stuttering / mumbling
- ☐ Trouble projecting voice

TMJ / TMD

- ☐ TMJ treatment past
- ☐ TMJ treatment current
- ☐ Popping or clicking
- ☐ Intense, throbbing
- ☐ Moderate pain
- ☐ Mild pain
- ☐ Paresthesia (tingling or pricking)
- ☐ Numbness
- ☐ Burning
- ☐ Acute inflammation (less than 2 weeks)
- ☐ Chronic inflammation (long-term, ongoing)
- ☐ Sharp and localized pain
- ☐ Pain on movement
- ☐ Pain reduced with rest
- ☐ Dull ache
- ☐ Diffuse (spread out) pain/ache
- ☐ Stiffness
- ☐ Deep ache, often at rest
- ☐ Inconsistent, variable pain
- ☐ Tenderness of the skin in area of pain
- ☐ “Knife-like” pain symptoms

Sleep

- ☐ Quiet sleeping at night with mouth closed, lips sealed
- ☐ Occasional snoring
- ☐ Frequent, snoring / loud breathing > 3 nights per week
- ☐ Loud snoring or can be heard through a wall or door
- ☐ Told that I occasionally gasp or stop breathing
- ☐ Sleep in strange positions
- ☐ Wake easily or often
- ☐ Bedwetting beyond age 5
- ☐ Wake tired and not refreshed
- ☐ Restless sleeping
- ☐ Teeth grinding / clenching
- ☐ Wear or recommended a grinding appliance (occlusal guard)
- ☐ Sleep with mouth open
- ☐ Sleep apnea test taken, when?

- ☐ Previous sleep-disordered breathing diagnosed, when and what?

- ☐ Fatigue / daytime drowsiness
- ☐ Wear or recommended snoring appliance
- ☐ Frequent urination
- ☐ Night terrors
- ☐ Night sweats
- ☐ Wake with headache
- ☐ Mouth taping at night
- ☐ Sleep aid / CBD / melatonin at night
- ☐ Are you male with a collar size > 17 inches?
- ☐ Are you female with a collar size > 16 inches?
- ☐ BMI greater than 30
- ☐ Being treated for hypertension
- ☐ Being treated for diabetes
- ☐ Being treated for heart disease
- ☐ Being treated for Alzheimer’s/ dementia
- ☐ Being treated for anxiety
- ☐ Being treated for depression
- ☐ Being treated for chronic pain

Behavior Challenges / Stress

- ☐ Sensory processing
- ☐ Oppositional defiance
- ☐ Hyperactivity / Inattention
- ☐ Average stress level in last month (10 high, 1 low)

- ☐ Other:

Head / Neck / Tension (Adults)

- ☐ Frequent headaches
- ☐ Jaw / facial pain / tension
- ☐ Clenching / grinding
- ☐ Neck tension / pain
- ☐ Shoulder tension
- ☐ Forward head posture
- ☐ Slouching

Medical Conditions & Medications (dosages not necessary):

Who Else is On Your Healthcare Team? (chiropractor, massage therapist, physical therapist, myofascial release, etc.)

Any Additional Information You Feel Helpful:

Quality of Life Scores:

These are common issues rated on a 1 (no problem) to 10 (significant problem) scale.

Please enter today's date at the top, and then please rate each box in that column with a number between 1 and 10 based upon what your experience is.

10 means it is a significant problem, 1 means there is not a problem.

Date				
...breathing through the nose. (congestion, colds, earaches, swollen tonsils, infections)				
...keeping lips together at rest (open mouth, lips apart at rest, chapped lips)				
...chewing & swallowing (uses face muscles, sloppy, noisy, quickly, drooling, tongue-tie)				
...sitting and standing with good posture (slouching, forward head, aches or pains)				
...eating and nutrition (picky, difficulty chewing, not nutritious, digestive issues)				
...daytime breathing (asthma, allergies to food, pollen, animals, toxins, parasites)				
...getting a good night's sleep (restless, snoring, messing bed, awakening, accidents)				
...breathing while sleeping (snoring, heavy breathing, open mouth)				
...body aches or pains (jaw aches, headaches, migraines, neck or back pain)				
...behavioral issues at home or in school (attention, learning, hyper, sleepy, spectrum)				

Patient Name: _____ DOB: _____ Date: _____

Epworth Sleepiness Scale (ESS)

The following questionnaire will help you measure your general level of daytime sleepiness. You are to rate the chance that you would doze off or fall asleep during different routine daytime situations.

Answers to the questions are rated on a reliable scale called the Epworth Sleepiness Scale (ESS). Each item is rated from 0 to 3, with 0 meaning you would never doze or fall asleep in a given situation, and 3 meaning that there is a very high chance that you would doze or fall asleep in that situation.

How likely are you to doze off or fall asleep in the following situations, in contrast to just feeling tired? Even if you haven't done some of these activities recently, think about how they would have affected you.

Use this scale to choose the most appropriate number for each situation:

0 = would never doze 2 = moderate chance of dozing
1 = slight chance of dozing 3 = high chance of dozing

It is important that you circle a number (0 to 3) on each of the questions.

Situation	Chance of dozing (0-3)			
Sitting and reading	0	1	2	3
Watching television	0	1	2	3
Sitting inactive in a public place --- for example, a theater or meeting	0	1	2	3
As a passenger in a car for an hour without a break	0	1	2	3
Lying down to rest in the afternoon	0	1	2	3
Sitting and talking to someone	0	1	2	3
Sitting quietly after lunch (when you've had no alcohol)	0	1	2	3
In a car, while stopped in traffic	0	1	2	3
Total Score:				

Scoring your results

Now that you have completed the questionnaire, it is time to score your results and evaluate your own level of daytime sleepiness. It's simple. Just add up the numbers you put in each box to get your total score.

The Epworth Sleepiness Scale key

A total score of less than 10 suggests that you may not be suffering from excessive daytime sleepiness. A total score of 10 or more suggests that you may need further evaluation by a physician to determine the cause of your excessive daytime sleepiness and whether you have an underlying sleep disorder.

Your next steps

This scale should not be used to make your own diagnosis. It is intended as a tool to help you identify your own level of daytime sleepiness, which is a symptom of many sleep disorders.

If your score is 10 or more, please share this information with your physician. Be sure to describe all your symptoms, as clearly as possible, to aid in your diagnosis and treatment.

It is important to remember that true excessive daytime sleepiness is almost always caused by an underlying medical condition that can be easily diagnosed and effectively treated.

Name_____

Date_____

Sleep Quality Assessment (PSQI)

What is PSQI, and what is it measuring?

The Pittsburgh Sleep Quality Index (PSQI) is an effective instrument used to measure the quality and patterns of sleep in adults. It differentiates “poor” from “good” sleep quality by measuring seven areas (components): subjective sleep quality, sleep latency, sleep duration, habitual sleep efficiency, sleep disturbances, use of sleeping medications, and daytime dysfunction over the last month.

INSTRUCTIONS:

The following questions relate to your usual sleep habits during the past month only. Your answers should indicate the most accurate reply for the majority of days and nights in the past month. Please answer all questions.

During the past month,

- When have you usually gone to bed? _____
- How long (in minutes) has it taken you to fall asleep each night? _____
- What time have you usually gotten up in the morning? _____
- How many hours of actual sleep did you get at night? _____
 - How many hours were you in bed? _____

5. During the past month, how often have you had trouble sleeping because you	Not during the past month (0)	Less than once a week (1)	Once or twice a week (2)	Three or more times a week (3)
A. Cannot get to sleep within 30 minutes				
B. Wake up in the middle of the night or early morning				
C. Have to get up to use the bathroom				
D. Cannot breathe comfortably				
E. Cough or snore loudly				
F. Feel too cold				
G. Feel too hot				
H. Have bad dreams				
I. Have pain				
J. Other reason (s), please describe, including how often you have had trouble sleeping because of this reason (s):				
6. During the past month, how often have you taken medicine (prescribed or “over the counter”) to help you sleep?				
7. During the past month, how often have you had trouble staying awake while driving, eating meals, or engaging in social activity?				
8. During the past month, how much of a problem has it been for you to keep up enthusiasm to get things done?				
9. During the past month, how would you rate your sleep quality overall?	Very good (0)	Fairly good (1)	Fairly bad (2)	Very bad (3)

Scoring

Component 1	#9 Score	C1 _____
Component 2	#2 Score (<15min (0), 16-30min (1), 31-60 min (2), >60min (3)) + #5a Score (if sum is equal 0=0; 1-2=1; 3-4=2; 5-6=3)	C2 _____
Component 3	#4 Score (>7(0), 6-7 (1), 5-6 (2), <5 (3)	C3 _____
Component 4	(total # of hours asleep) / (total # of hours in bed) x 100 >85%=0, 75%-84%=1, 65%-74%=2, <65%=3	C4 _____
Component 5	# sum of scores 5b to 5j (0=0; 1-9=1; 10-18=2; 19-27=3)	C5 _____
Component 6	#6 Score	C6 _____
Component 7	#7 Score + #8 score (0=0; 1-2=1; 3-4=2; 5-6=3)	C7 _____

Add the seven component scores together _____ Global PSQI _____

A total score of “5” or greater is indicative of poor sleep quality.

If you scored “5” or more it is suggested that you discuss your sleep habits with a healthcare provider

Patient Name: _____ DOB: _____ Date: _____

Fatigue Severity Scale (FSS)

The Fatigue Severity Scale (FSS) is a method of evaluating the impact of fatigue on you. The FSS is a short questionnaire that requires you to rate your level of fatigue.

The FSS questionnaire contains nine statements that rate the severity of your fatigue symptoms. Read each statement and circle a number from 1 to 7, based on how accurately it reflects your condition during the past week and the extent to which you agree or disagree that the statement applies to you.

- A low value (e.g., 1) indicates strong disagreement with the statement, whereas a high value (e.g., 7) indicates strong agreement.
- It is important that you circle a number (1 to 7) for every question.

FSS Questionnaire

During the past week, I have found that:	Disagree  Agree						
1. My motivation is lower when I am fatigued.	1	2	3	4	5	6	7
2. Exercise brings on my fatigue.	1	2	3	4	5	6	7
3. I am easily fatigued.	1	2	3	4	5	6	7
4. Fatigue interferes with my physical functioning.	1	2	3	4	5	6	7
5. Fatigue causes frequent problems for me.	1	2	3	4	5	6	7
6. My fatigue prevents sustained physical functioning.	1	2	3	4	5	6	7
7. Fatigue interferes with carrying out certain duties and responsibilities.	1	2	3	4	5	6	7
8. Fatigue is among my three most disabling symptoms.	1	2	3	4	5	6	7
9. Fatigue interferes with my work, family, or social life.	1	2	3	4	5	6	7
Total Score:							

Scoring your results

Now that you have completed the questionnaire, it is time to score your results and evaluate your level of fatigue. It's simple: Add all the numbers you circled to get your score.

The fatigue Severity Scale key

A total score of less than 36 suggests that you may not be suffering from fatigue.

A total score of 36 or more suggests that you may need further evaluation by a physician.

Your next steps

This scale should not be used to make your own diagnosis.

If your score is 36 or more, please share this information with your physician. Be sure to describe all your symptoms as clearly as possible to aid in your diagnosis and treatment.