



# Guidelines for Intake

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These guidelines are intended to help facilitate conducting intakes and preparing individual treatments for clients. They are best used in conjunction with a more in-depth intake form. The guidelines are to help the novice as well as the experienced clinician to notice and record their observations of the client during the course of an intake. These observations and cues can help give the practitioner insights that may then guide them in preparing their client's individual herbs, formulations and dosages. The guidelines are not in any specific order, so it may be helpful to read thru them a few times and keep them on hand as you perform an intake.

1. General hunches and gut feeling about your client's health. Is their problem as they see it, the same as you see it? What are the differences, if any?
2. General feeling on their self-confidence, how they hold themselves, eye contact, voice quality, body language, and emotional spirit.
3. Ayurvedic doshas- which are their predominant doshas and which one may be the most out-of-balance and need to be addressed .
4. TCM evaluation including pulse and tongue diagnosis
5. Relevant history- when did the first symptoms appear? Were there any other events that may have brought it on? Does anyone else in their immediate family have similar health issues?
6. Intuitive assessment- record any intuitive feelings you may have on their condition and situation.
7. Do they want to improve their condition?
8. Any other observations drawn from your interaction
9. Emotions, feelings this interview brought up in you
10. Questions you feel unsure about. Discrepancies. Things you feel you may have missed.

## Treatment

11. Herbs – individual
12. Herbs – formulas
13. Dosage and schedule for the above
14. Rationale for herbs and formulas
15. Other suggestions such as lifestyle, nutrition, exercise, habit changes
16. Determine probable compliance in treatment protocols and adjust your treatments thusly.
17. Course of action- what is your plan in the large picture to coordinate the herbal medicine and other treatments.
18. Summation of their condition- what may be the big picture causing these symptoms
19. Follow up – How does the client subjectively and objectively feel? Do they seem healthier? Do they need any changes in their herbs and or formulas? Has any one thing made a noticeable change?