

# An Herbalist's View Guidelines for Intake

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These guidelines are to help facilitate herbalist's intakes and assist in preparing individual medicines and treatments strategies for patients. These include specific herbs, formulations, and dosages along with other health protocols. There is no specific order to these questions, as each intake will be adjusted for the individual patient. It may be helpful to read through these guidelines and keep them on hand. They are very simplified approaches and just meant to offer alternative perspectives. I have other handouts on my website (i.e., Formulation, Patient Compliance) that would expand many of the below ideas.

## Intake Approaches

1. Goals
  - To help the patient
  - While this is a very basic statement, it is helpful to keep in mind, especially when things get tricky during a consultation. For instance, you may be working with someone who thinks they have chronic Lyme disease, but you are not sure. At one point you may have to say, "I understand you may have chronic Lyme disease, but my goal is to help you and I want to explore other possibilities as well". Hopefully this puts the patient more at ease.
  - It is also important to remember that it is more important to help the patient than give them herbs. During the intake you may decide that a different practitioner would be more helpful for their health condition.
  - Your approach is important. This includes the tone of your voice and *the way* you ask questions. It is important to try and make patients feel comfortable.
2. General hunches and gut feelings about your patient's health
  - Is the way your patient perceives their health problem the same as you see it?
  - If there are differences, what are they?
  - Are the differences important in treatment protocols?
  - Note any significant feelings you have about their condition and situation. These could lead to further helpful questions.
3. General feelings on their composure
  - It is helpful to note how they hold themselves, eye contact, voice quality, body language, and emotional state.
  - These aspects can be helpful in assessing possible causes for health problems and is also helpful in preparing individual medicines.
4. Ayurvedic and Traditional Chinese Medicine
  - What are their predominant doshas?
  - Which one may be the most out-of-balance and needing to be addressed?
  - Pulse, tongue and other diagnosis.

5. Medical diagnosis
  - What medical diagnosis have they received?
  - Do they have any lab results? How current are they?
  - How does this work into your assessment?
  - Does the patient understand their diagnosis?
6. Relevant history
  - When did the first symptoms appear?
  - Were there any events that may have brought it on?
  - Does anyone else in their immediate family have similar health issues?
  - When a patient is describing what may have originally caused their health problem, it is often helpful to stop their story and question aspects of it to help tease out other details.
7. Does the patient seem like they want to improve their condition?
8. Any other observations drawn from your interaction?
9. Emotions that the intake brought up in you that may get in the way of you helping.
10. Questions you feel unsure about
  - Discrepancies
  - Things you feel you may have missed?

## **Treatment Strategies**

1. Herbs-Individual
  - Individual plants you feel are specific for their health.
2. Herbs-Formulation
  - Consider how much of each plant to use in each formula.
  - Do the individual plants complement each other?
  - Are there too many plants so none are strong enough to have the desired effect?
3. Preparations
  - What form (tincture, tea, etc) would work best?
  - What forms is the patient willing to take?
4. Dosage (quantity and frequency)
  - Are the dosage instructions well understood by the patient?
  - Will the dosages be changed over time?
  - Is there is a different initial loading dose?
  - Does the dosage fit into their daily routine?
5. Rationale for herbs and formulas
  - It may be helpful for the patient to understand why they are taking these medicines.
  - It may help the practitioner in preparing a formula and set dosages by having a clear idea of what the medicine is looking to treat.
6. Other suggestions
  - Lifestyle, nutrition and exercise.
  - Ways to improve mental health and stress reduction.
  - Counseling.

7. Compliance in treatment protocols
  - Ask the patient if they are willing to follow the suggested dosages.
  - Are they willing to take the medicines? Many herbal preparations are unfamiliar to patients.
  - If they feel they cannot take the medicines or take them in the manner you suggest, how can you set it up to make it easier.
8. Course of action
  - Will you need to coordinate herbal medicines with other treatment plans set up by you or other practitioners?
  - What is your long-range health plan with each patient?
  - Are they working with other health care practitioners? How does that fit into how you are helping them?
9. Summation of their condition
10. Follow up
  - How does the patient feel after their treatment?
  - Do they seem healthier?
  - Do they need any changes in their herbs and/or formulas?
  - Has any one thing made a noticeable change?