

An Herbalist's View Guidelines for Intake

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These guidelines are to help facilitate herbalists' intakes and to assist in preparing individual medicines and treatments. These include preparing specific herbs, formulations, and dosages along with other healthcare protocols.

There is no specific order to the questions below, as each intake will be adjusted for the individual patient. It is helpful to read through these guidelines as well as formulating your own questions that are important for you as a practitioner.

These are very simplified approaches and just meant to offer perspectives. I have other handouts on my website (e.g., Formulation, Patient Compliance) that would expand on many of the ideas below.

Intake Approaches

Goals

1. The basic goal is to help the patient
 - This is helpful to remember when things get tricky during a consultation
 - For instance, you may be working with someone who thinks they have a parasite that is causing all their symptoms, but you are not sure.
 - At one point, you may need to say, "I understand you feel you have a parasite, but my goal is to help you, and I want to explore other possibilities as well."
 - This may help put them at ease while obtaining new information.
2. It is more important to help the patient than to give them herbs.
 - During the intake, you may decide that a different practitioner or modality would be more helpful for their health condition.
3. During the consultation, it can be helpful to establish a goal or a set of goals for each individual patient.

Counseling Skills

1. Be aware of the tone of your voice and body language
2. The way one asks questions is important to make patients feel comfortable.

General hunches and gut feelings about your patient's health

1. Is the way your patient perceives their health problem the same as you see it?
2. If there are differences, what are they?
3. Are the differences important in treatment protocols?
4. Note any significant feelings you have about their condition and situation. These could lead to further helpful questions.
 1. General feelings on their composure

- It is helpful to note how they hold themselves, as well as eye contact, voice quality, body language, and emotional state.
- These aspects can help assess possible causes for health problems and are also helpful in preparing individual medicines.

Medical diagnoses

1. What medical diagnosis have they received?
2. Do they have any lab results? How current are they?
3. How does this work into your assessment?
4. Does the patient understand their diagnosis?

Relevant history

1. When did the first symptoms appear?
2. Were there any events that may have brought it on?
3. Does anyone else in their immediate family have similar health issues?
4. When a patient describes what may have originally caused their health problem, it is often helpful to pause their story and question aspects of it to tease out other details.

Observations

2. Does the patient seem like they want to improve their condition?
3. Any other observations drawn from your interaction?
4. Emotions that the intake brought up in you that may get in the way of your helping.
5. Questions you feel unsure about
 - Discrepancies
 - Things you feel you may have missed?

Treatment Strategies

Herbs-Single or Formulation

1. How many medicines
2. Individual plants specific for their health needs

Formulations

1. Consider how much of each plant to use in each formula.
2. Do the individual plants complement each other?
3. Are there too many plants, so none are strong enough to have the desired effect?

Preparations

1. What form (tincture, tea, etc) would work best?
2. What forms is the patient willing to take?

Dosage (quantity and frequency)

1. Are the dosage instructions well understood by the patient?

2. Will the dosages be changed over time?
3. Is there a different initial loading dose?
4. Does the dosage fit into their daily routine?

Rationale for herbs and formulas

1. It may be helpful for the patient to understand why they are taking these medicines.
2. 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.

Suggestions-non-herbal

1. Lifestyle, nutrition, and exercise.
2. Ways to improve mental health and stress reduction.
3. Counseling

Compliance in treatment protocols

1. Ask the patient if they are willing to follow the suggested dosages.
2. Are they willing to take the medicines? Many herbal preparations are unfamiliar to patients.
3. If they feel they cannot take the medicines or cannot take them as you suggest, how can you set it up to make it easier?

Course of action

1. Will you need to coordinate herbal medicines with other treatment plans from other practitioners?
2. What is your long-range health plan with each patient?
3. Are they working with other health care practitioners? How does that fit into how you are helping them?

Summation

1. It can be helpful to tell the patient what you feel is wrong and your approach toward helping them.
2. It could sound something like: 'I think your joints hurting is making it difficult to sleep, so I would like to address both of these issues by giving you anti-inflammatories for the pain and increasing the dose at night to help you sleep.'

Follow up

1. How does the patient feel after their treatment?
2. Do they seem healthier?
3. Do they need any changes in their herbs and/or formulas?
4. Has any one thing made a noticeable change?