

## Clinical Skills for Herbalists: The Art of the Intake

### Syllabus with Details

| Date        | Topic   | Teacher                               |
|-------------|---|---------------------------------------|
| January 11  | <ul style="list-style-type: none"> <li>• You and your client: Steps to a therapeutic relationship</li> <li>• Confidentiality, healthy boundaries and more</li> <li>• Tips for the intake process</li> </ul>   | Patricia K. Howell                    |
| January 18  | <ul style="list-style-type: none"> <li>• Asking and listening</li> <li>• The problem with “normal”</li> <li>• Red flags, harm reduction and your referral network</li> </ul>  | Patricia K. Howell                    |
| January 25  | <ul style="list-style-type: none"> <li>• Listening for the story: The importance of narrative</li> <li>• Creating a health history timeline</li> <li>• Establishing shared goals, realistic outcomes and expectations</li> </ul>  | Patricia K. Howell                    |
| February 1  | <p>Assessment &amp; Differential Diagnosis</p> <ul style="list-style-type: none"> <li>• Body systems</li> <li>• Herbal actions</li> <li>• Energetics</li> <li>• Physical assessments</li> <li>• Understanding and working with a medical diagnosis and pharmaceuticals</li> </ul> | Mimi Hernandez & Patricia K. Howell & |
| February 8  | <p>Assessment &amp; Differential Diagnosis</p> <ul style="list-style-type: none"> <li>• From intake to differential assessment</li> <li>• Clarifying and modifying health goals</li> <li>• Establishing realistic expectations</li> </ul>   | Patricia K. Howell                    |
| February 15 | <p>Creating Treatment Protocols</p> <ul style="list-style-type: none"> <li>• Realistic timelines for diet and lifestyle changes</li> <li>• Tracking progress and adjusting outcomes in follow up consultations</li> </ul>   | Patricia K. Howell                    |
| February 22 | No Class  |                                       |
| March 1     | <p>Live Intake: Client #1</p> <ul style="list-style-type: none"> <li>• Streamed client intake</li> </ul>  | Patricia K. Howell                    |
| March 8     | <p>Discussion: Client #1</p> <ul style="list-style-type: none"> <li>• Review of intake process</li> <li>• Questions and observations</li> <li>• Creating a chronological timeline</li> </ul>  | Patricia K. Howell                    |

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| March 15     | Roundtable: Protocols and Treatment Strategies for Client #1 <ul style="list-style-type: none"> <li>• Symptoms</li> <li>• Acute vs Chronic</li> <li>• Choosing herbal preparations</li> <li>• Dosing strategies</li> <li>• If/Then thinking</li> </ul> | Patricia K. Howell |
| March 22     | Live Intake: Client #2 <ul style="list-style-type: none"> <li>• Same as above</li> </ul>   | Mimi Hernandez     |
| March 29     | Discussion: Client #2 <ul style="list-style-type: none"> <li>• Same as above</li> </ul>  | Mimi Hernandez     |
| April 5      | Roundtable: Protocols and Treatment Strategies: Client #2 <ul style="list-style-type: none"> <li>• Same as above</li> </ul>  | Mimi Hernandez     |
| Bonus Videos | Four 90-minute videos:<br>Prerecorded and dropped in conjunction with each module  |                    |
| Module 1     | Apothecary Basics  | Mimi Hernandez     |
| Module 1     | Business Basics  | Patricia K. Howell |
| Module 2     | Implementing Diet Changes  | Patricia K. Howell |
| Module 2     | Client File Management   | Mimi Hernandez     |