

UNTYING THE KNOT: Making Sense of the Complicated Case

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We've all had the experience - a client walks in the office and lists 20 things that are wrong. "No one has helped," he or she cries to us. Guaranteed, our client does NOT have 20 unrelated disorders. We can help by finding the common threads or the patterns of these disorders, by developing a strategy for addressing these patterns and only then by selecting herbs that are consistent with our strategy. Yes, we can help! In fact, herbalists can succeed with complicated cases where many other practitioners have failed.

Complicated cases include many of the cases we see today - autoimmune, diabetes, AIDS, hepatitis, autism and cancer. A complicated case may be one where the client has many symptoms, or where the symptoms appear to be contradictory. It may be a case where western medicine has failed, where your client has seen "dozens of doctors" and has spent "tens of thousands of dollars." It may be an autoimmune case - or perhaps - 4 or 5 diagnosed auto-immune cases. It may be a case that appears to fall into all the patterns you were taught in your energetic analysis classes, or a case that appears to involve multiple bodily systems. What do you do? You can't just give every herb on your shelf!

Making sense of the complicated case requires us to delve deeply into our client's specific issues. We need to develop and utilize detective skills: with respect to each symptom we need to ask follow up questions, pursuing when it began, when it is experienced, the frequency, where it is located, how it is experienced, and the magnitude of pain or discomfort. A single answer may lead us to multiple questions. Combining the client's (subjective) description with our objective assessment, including information from Tongue, Pulse, appearance, and skin temperature, results in a tremendous volume of information.

Traditional Chinese Medicine, Ayurveda, and Western organ and energetic analysis, provide us with tools for making sense of this information. They enable us to identify the threads or common themes of a client's disorder. But in a complicated case, we may see evidence for a dozen different patterns. If we treat a dozen different patterns, we end of treating nothing! To be effective, we must focus. Optimally, we will identify 2 or 3 patterns that predominate for a client, providing us with our theory or Analysis of the case. Using that Analysis, we can develop our Treatment Strategy. Only then, can we move to our Herbal Recommendations.

Be willing to schedule additional time. Don't try to do it all in one visit.

Often, your client will tell you in advance that his or her case is "a tough one" or a complicated case. You may discover this in the course of your session. Regardless, you may wish to have a policy in place or a plan, to schedule several consults once you see that this is a complicated case. Avoid feeling embarrassed for not being able to understand and know it all, after your short visit! Although a split consult may be a new concept for herbalists it is not new for doctors, many of whom see a patient briefly, order tests, and agree to see the patient the next week.

Charge for each visit! You are charging for your time and expertise, not just for herbs.

Make an initial dietary recommendation.

Food sensitivities, food effects, and various dietary problems can create many symptoms that contribute to the complicated case. For example, if a cold and deficient person gets rashes from tomatoes and eats them anyway, you may observe a heat and excess condition in an otherwise cold and deficient person. Elimination of inflammatory foods such as tomatoes may considerably

simplify the case. Toxic food additives may be at the heart of many neurological issues. Even small changes to diet, when appropriate, may significantly improve how your client feels, may relieve multiple and seemingly disparate symptoms, and may greatly simplify your job.

If you can make a dietary recommendation based on the initial visit, do so, explaining that you will re-evaluate at the next visit.

A colleague of mine has all new clients do a one week kitcheree fast (lentils and rice cooked in ghee with spices) and provides Triphala to them all. In this way, he eliminates major allergens including gluten, most dairy, soy, corn and eggs, and also keeps their bowels open and moving. Because they only eat kitcheree, they automatically eliminate fast food, preservatives, artificial sweeteners, sugar, and damaged fats. His clients comply and love him for it! Many feel terrible for a few days, almost all feel great by the end of the week, some ask if they can continue a little longer. Meanwhile, he has time to study the case and to be ready for the next visit.

Recommend reduced or eliminated coffee, black tea, and chocolate consumption in sleepless, nervous, anxious or agitated clients.

“Half caf” instead of regular for coffee lovers.

Decaf black tea or green tea instead of regular black tea.

Higher quality chocolate, with smaller amounts.

Always ask if a client suspects or knows of a particular food sensitivity, or if one “runs in the family.” Eliminating that suspected food, even for 1 week, often yields significant results.

A new client with a history of eczema and constipation came in with a primary issue of a red buttock rash. She had an allergic response, as a child, to milk. She suspected that she was still sensitive to dairy products but did not notice any digestive problems (other than her constipation). Elimination of dairy resulted in most of the rash disappearing - her herbal remedies eliminated the rest.

Dairy sensitivities often are involved, when clients have any of the following: chronic sinus issues, eczema, runny nose from eating or drinking cheese, milk, yogurt or kefir, or constipation.

If gluten sensitivity is suspected, I recommend that you give the client a choice between getting tested immediately or skipping the testing and eliminating gluten 100%. Note: Lab tests normalize within 6 months of going gluten-free. The best time to get tested is while eating gluten.

1. Immediate, 100% elimination of all gluten. No cheating and no exceptions. This involves significant client and practitioner education. Excellent books include:

* Shari Lieberman, The Gluten Connection: How Gluten Sensitivity May be Sabotaging Your Health (Rodale, New York 2007).

* Dana Corn, Living Gluten Free for Dummies, 2d Edition (For Dummies 2011). See also Pocket and Kindle editions

* Gluten Free Cheat Sheet online: <http://www.dummies.com/how-to/content/living-glutenfree-for-dummies-cheat-sheet.html>

* William Davis, MD, Wheat Belly (Rodale, New York 2011)

2. Seeing a physician (likely an endocrinologist) who will order the tests needed for diagnosis of gluten sensitivity. Caution: 1 test is not enough! Caution: NO ONE CAN

SEE GLUTEN SENSITIVITY, from how a patient looks, or even from simply looking at their small intestine (unless very severe Celiac). The current tests, as of 2014, include:

- Tissue Transglutaminase iga (tTG iga)
- Tissue Transglutaminase igg (igg(tTG)
- EMA. (If not included, you will miss 20% of all Celiac!)
- Anti-gliadin IgA
- Anti-gliadin IgG
- Serum IgaA

A new client, age 41, came in with a primary issue of facial acne. She said that she was sensitive to dairy but stated most adamantly that she was not to gluten. She did say that her mother, sister, and daughter all had Celiac disease - which involves an inability to digest gluten. She also had been tested by her family doctor for Celiac, but had tested negative. I suggested that she choose between the following:

First, she could go to a local endocrinologist who specialized in Gluten sensitivity, for comprehensive testing. If she went to the endocrinologist, I could give her herbs the following day.

Second, she could participate in a personal science experiment - to eliminate all gluten - and take no herbs for now - just for 1 month. (It is possible to be strongly reactive to gluten without having Celiac disease).

The client really wanted her herbs - now! - she elected to go to the endocrinologist for testing and returned the next day for her herbs. She also decided to go gluten free. The tests returned - positive for gluten sensitivity.

The facial acne cleared completely, with her internal and external herbs, combined with 100% gluten avoidance.

You may consider recommending a grain-free or at least gluten-free diet for people with neurological issues, including Multiple Sclerosis, Lou Gehrig's Disease, Epilepsy, and others. Excellent books include:

1. Terry Wahls, M.D., The Wahls Protocol : How I Beat Progressive MS Using Paleo Principles and Functional Medicine (The Penguin Group, New York 2014)
2. David Perlmutter, Grain Brain: The Surprising Truth about Wheat, Carbs, and Sugar – Your Brain's Silent Killers (Little, Brown & Co., New York 2013)

Traditional Chinese and Classical Chinese Medicine teach that the following foods contribute to Phlegm: flour, dairy, and sugar. Phlegm related health issues include: numbness, dizziness, pain in the joints, cough, respiratory mucus, sinus issues, migraine headaches, nausea and vomiting, goitre, nodules and other lumps, and many mental/emotional disorders.

Interestingly, flour, dairy and sugar are at the top of many of the avoid lists mentioned above. Check out Wahls, Davis, Perlmutter and others - they all recommend immediate elimination of those foods - especially for neurological but also for other issues.

Request a list of all medications.

Look up every medication and check for Black Box Warnings, Adverse Reactions, and Contraindications/Cautions.

1. Epocrates is a free App that is available for smart phones. (The website may require a hefty fee, unlike the free App.) It is widely used by physicians and its information is highly respected. Once you download it, it is easy to use.
 - a) If you or your client has to speak with a physician concerning a drug, being able to say “Epocrates says....” is invaluable. It is NOT helpful when your client says “my herbalist said to discontinue this medication.”
2. The FDA lists side effects on its website.
3. If you or your client suspects that a medication is causing symptoms and these side effects are not listed in the “official” listings, you may search online. In your search browser, enter the name of the medication, the symptom, and “side effect.”

Even if your search reveals a Black Box warning for the medication, that shows a life threatening effect for your client, **do not** advise your client to discontinue the medication. **Do** send your client immediately for medical advice from her doctor. If the doctor is not available, have your client see a pharmacist. Today.

1. If you can, print out a copy of the Black Box warning, including the name of the drug and details of the symptoms, and provide that to your client.
2. Advise your client that anything to do with medication, is medical, and requires the attention of an expert in medicine - NOT an expert in herbs.
3. Advise your client to NOT discontinue the medication without medical advice, and note that in your file.
4. I highly recommend cultivating doctor friendships! If your client cannot get in to see her doctor or perhaps has no regular doctor, it is great to have a doctor who will see your client the same day.

A very senior client began having falling and having delusions. Three months after entering a nursing home, her family called and asked if there was anything natural that could be done. A review of her medications revealed a side effect for multiple medications of severe reductions in Potassium levels, that could result in delusions. The family showed the side effect printout to the physician and requested a Potassium lab test. The test showed critically low levels of Potassium and other mineral imbalances. Her physician immediately swung into action and changed her medication. Improvement was immediate but not complete. Herbs and supplements were used to help restore her mental function and balance.

Request a complete food diary, including all beverages and medication.

I request a food diary for at least 1 week, and often extend this for another three weeks. A food diary can reveal what the client did not know or remember to tell you. I emphasize that this is not for judging, but to help find what is happening for this client.

1. Ask that everything, every bite, every sip, be included.
2. Dietary descriptions may differ wildly from what your client is eating.
 - a. A client reported that she ate a vegan diet. Her food diary showed 4 ounces of smoked salmon, 3x per day.
3. Have clients measure how much they actually drink. One client drank “a few glasses of wine daily.” She actually was drinking a bottle - 25 ounces - daily.
4. A few coffees - turned out to be drunk from filled 32 ounce containers.

Take a complete health history.

You may need to circle back for more information, explaining to your client that now that you have the basic picture, you need to fill in some gaps. For every symptom request the following information:

When it began (date or number of days/months/years ago)

What was happening when it began (a close relative died/I had the flu/bankruptcy)

What does the symptom feel like? (Aching, throbbing, burning, bursting)

If there is pain, how severe is it on a 10 point scale (10 being the worst).

How often do you experience this?

What time do you experience the symptom? What time is it better or worse?

How do hot or cold applications affect the symptom?

Color and smell for anything coming from body.

Stool: “unusually bad” or “really bad” smell. Color: “light, medium, or dark brown, black, yellow, green, or white.”

Urine: smell and color (see above).

Secretions from eyes, nose, throat, skin, genitals: color and smell.

Examine the tongue and take photos.

iPhones and many digital cameras take great tongue pictures. Take notes on what you see. If you have not had training in tongue assessment, consider taking a class! Even if you have not studied tongue assessment, you may be able to consult with a colleague who has taken this training. Most herbalists find tongue assessment to be interesting and fun and almost immediately applicable.

Even herbalists who have minimal training in tongue assessment can spot certain major imbalances.

As a general rule in Traditional Chinese Medicine (TCM), use the tongue to choose which pattern(s) predominate - this is great for the complicated case!

A client came in, direct from an “unsatisfying” visit with her family doctor, claiming to be a “complicated case.” Feeling ill, she asked that I look her over. Her tongue was purple - really purple - with swelling at the tip of her tongue. [Purple is a sign of Blood Stagnation. Blood Stagnation at the Heart can be life threatening!] Her skin was clammy - moist. Her pulse was irregularly irregular - the speed kept changing and the number of consecutive beats kept changing. [An irregular pulse is associated with Blood Stagnation.] The tip of the tongue is associated with the heart. The purple tongue and the irregular pulse both are signs of “Blood Stagnation” in Chinese medicine. The combined tongue and pulse patterns strongly pointed to Blood Stagnation and Heart - which in western medicine could be a heart blockage. I gave her 15 ml of Red Sage Rt. tincture orally. (I also gave her an aspirin - as requested by physicians.) Suggesting that she be seen by a cardiologist, I called my favorite cardiologist, explained my reasoning, and asked that she be seen immediately. On my client’s way out the door I assured her that I would be here for her, regardless of the result. Twenty-four hours later, she was resting comfortably from quadruple bypass surgery.

What had her family doctor missed? Using a different diagnostic system, her family doctor likely had focused on laboratory results which showed low cholesterol, her blood pressure which tested low, and her lack of personal or family heart history. Seeing no other signs of heart pathology, her family doctor likely moved his attention

to other areas.

Pulse assessment also is excellent but is more of a lifetime study. Check out Will Morris, PhD, Daom, LAc for classes.

Look for Never Well Since.

Asking, “when did this all begin?” and “then what happened?” may provide you with a flood of astonishingly detailed information complete with dates, symptoms, and “he/she done me wrong.” You may discover that your client never really got over her flu, pneumonia, divorce, car wreck, or grief, and that your client continues to suffer from this. You really CAN go back. The NWS can provide you with a starting point for your treatment plan.

A middle aged female client came to me with a primary issue of no sense of smell and no appetite - she only ate the food her husband placed in front of her, she never thought to eat on her own. Traditional Chinese Medicine would consider Spleen Qi deficiency - a type of digestive weakness - as the cause, but she had been seen by excellent TCM practitioners with no effect. She showed me an herbal formula that she had been given - for Spleen Qi deficiency - it had no effect. We talked about her past, going back 10, 20, and then 30 years. Thirty years ago, she had been riding a motor scooter along the cliffs of Bermuda when a truck came and ran her off the road, and off the cliff. She went into a coma for 5 weeks while medical personnel repaired her body. When she awakened she had to be re-taught how to eat and to walk. Her husband divorced her.

As my client spoke, the hour grew late, and the light in my office dimmed. I noticed that her pupils, very small at the start, did not expand with the darkness. This is a major symptom of shock! It appeared that she had not come out of shock from events that had occurred 30 years ago.

I treated her for shock with a single remedy and asked to see her in a week.

The next day, her husband called, elated. She was hungry! She could smell - not much, but some! She had returned home, having stopped on the road for food. Her appetite has continued, for years now. NWS solved the mystery.

Ask Your Client for His/Her Opinion of the Source of the Problem

Clients often have precise and detailed opinions of what caused or is causing their issue. Sometimes, they are correct! Especially in complicated cases, I ask clients for their opinion, and repeat the question even if answered with, “I don’t know.” Often, a client will share his or her opinion, given the space to do so.

An elderly and obese patient in great pain and in a wheelchair came to the office complaining of pain and weakness. I took her history, which included a long list of symptoms including all manner of respiratory diseases, hypertension, gall bladder disease with necrosis, kidney problems, colon problems - the list went on and on. In terms of Traditional Chinese Medicine, she had symptoms in 5 different elements, and symptoms of excess and deficiency. I could not make sense of it all. Finally, I asked her what she thought was the source of her pain. She shouted at me “you don’t want to know!” I shouted back, “yes, I do!” Finally, she told me she had been offering this information for years -- her doctors did not want to hear it -- she eventually stopped trying.

She explained that 35 years ago, she had a flu that was “bad, really bad.” The kind of flu “with pain so bad that it felt as though my bones would break.” She said that she never feared that she would die, only that she would be crippled from broken bones. Her bones did not break and the pain eventually decreased. Her pain never completely left her - but no one believed she could be in pain from a flu so long ago.

I stopped trying to figure out her case. I treated her as if she had the flu, today. After a single dose of Eupatorium Perfoliatum - Boneset - she stood up. By herself. She began yelling, “ why didn’t people listen to me earlier?!?” Her pain never returned. (Yes, she did need further treatment, mainly for Liver/Gallbladder issues with anger.)

Write a clean information list.

Your client likely filled out an intake form, perhaps checking every box. You took additional notes. You may have discovered food sensitivities, NWS (never well since), and client theories. Rewrite the case, creating a list of all the symptoms. With complicated cases, I like doing this on the computer so that I can easily reorder symptoms and eliminate repeated statements. You might try organizing the case chronologically - for cases with a lot of events and dates - or by pattern if you are using TCM or another analytic system, or by organ system. The simple act of making a list, may promote greater understanding of your case. Make a separate list of symptoms that occur at particular times of day.

Write a list of Syndromes or Themes

A theme could be anything that repeated in the symptoms list - such as dryness or heat.

A syndrome from Chinese Medicine and could be yin deficiency or blood heat.

Look for themes or syndromes that explain the majority of symptoms, with the smallest number of themes or syndromes.

Simplify and Focus!

Keep in mind your client’s Primary Issue or Primary Complaint - I highly recommend that this be addressed. (If you don’t directly address the Primary Issue, even if you do everything else, your client may move on to someone who will!) If you have several closely related syndromes, choose the one that is most descriptive. For example, if you have listed both Spleen qi deficiency and Spleen Yang deficiency, choose one and not both. If you see Spleen qi deficiency and a lot of coldness - it likely is Spleen Yang deficiency.

In any case, I prefer to focus on 2 or 3 syndromes - maximum.

Treatment Strategy

Once you have simplified your syndromes or themes, write your Treatment Plan, such as Moistening dryness or Tonify yin. From here, we move to our herbal remedies.

Conclusion

I used to become so impatient at conferences - why couldn’t we get to the herbs faster? Why were they always at the end of a talk?!? I found out the answer in the clinic; if we can wait, if we can take time to organize our thinking and to hear our clients out, and then select the best possible herbs. Sometimes we see magic. We definitely will see improvement.