

Preparing a Case Study for Review

Presented by Patricia Kyritsi Howell, RH (AHG)

American Herbalists Guild
Professional Herbalists Training Webinar Series
April 7, 2014

Two Types of Case Studies



Confidentiality

- All cases must be anonymous. Remove name, contact information and any identifying info.
- Create a coding system for all cases presented for review.
- Be certain you have an Informed Consent/Release Form on file for every client reviewed.

Mentorship Review

- Creates an overall picture of the case, and you!
- Demonstrates your ability to conduct a thorough intake and organize a case.
- Requires you to use a valid functional assessment method.
- Demonstrates your ability to
 - work with a materia medica, create formulae, calculate dosage, contraindications
 - skills needed to make realistic lifestyle recommendations
- Allows your mentor to see your process, and provide feedback.

Mentorship Review

- Broad overview of the case
 - Age, gender, height, weight, occupation, ethnicity
 - Chief complaint/Reason for visit
 - Main symptoms
 - Primary and secondary health goals

Mentorship Review

- Medical, family and psychosocial history
 - Medical history
 - Pharmaceuticals, surgery, major trauma, etc.
 - Known allergies
 - Family health history (be brief, emphasize *relevant* info)
 - Birth trauma, early childhood, parent/sibling health history
 - General lifestyle
 - Exercise, sleep, relationship status, home life
 - Alcohol, recreational drug use and cigarettes (past and present)
 - Diet overview
 - (preferably using info provided by the client in the form of a food log)

Mentorship Review

- Reproductive health/history
- Elimination habits
- Balance between rest/play/creativity
- Overall stress level (as rated by client)

Mentorship Review

- Observational Assessment
 - Notes on possible future treatment protocols if....then.....
 - Referrals to other practitioners
 - Self-observation

Professional Membership Application

- Three case studies with follow ups
 - On humans, unless you are a vet or only work with animals
- Emphasis on providing a concise, comprehensive summary
 - Your assessments
 - Herbal recommendations
 - Detailed treatment protocols
 - Outcomes

AHG Professional Membership Application Case Study Review

When choosing cases studies to submit ask yourself...

Why is this case valuable to you?

What did you learn?

Will other practitioners find it valuable?

AHG Professional Membership Application Case Study Review

- Be as brief and succinct as possible when writing the health history and case overview, while still including all relevant information.
- Clearly outline the assessment techniques you used and your findings.

Basic Format for AHG Case Studies

- Broad overview of the case
 - Age, gender, height, weight, occupation, ethnicity
 - Chief complaint/Reason for visit
 - Main symptoms
 - Primary and secondary health goals

Basic Format for AHG Case Studies

- Assessment techniques:
 - Tongue, hair, face, skin, complexion, nails, pulse, etc.

- Constitutional analysis
 - Elemental approach to constitutions (TCM, Ayurveda, etc.)
 - Body systems
 - Folk medicine using body energetics (hot/cold, damp/dry, etc.)

- Knowledge of any medical conditions or diagnosis based on symptom and disease patterns

Basic Format for AHG Case Studies

- Provide detailed clinical reasoning for your treatment plan and herb protocols
 - **Briefly** describe nutritional and lifestyle recommendations

 - Focus on outlining the herbal treatment protocols you used

 - Give a short defense of the herbs you have chosen along with your formula descriptions.

Basic Format for AHG Case Studies

- Outcomes
 - Follow up visit (within one month of initial visit)
 - Client-assessment of treatment protocol
 - Compliance check
 - Adverse or unanticipated reactions
 - Reassessment (using same techniques as initial visit)
 - Practitioner-assessment of treatment protocol

 - Changes to treatment protocol

 - Relevant discussion (info you gained from this case)

AHG Case Studies

“Just the facts, ma’am.”

Do not include a full review of all body systems (unlike a Mentor Review).

Don't submit your intake form or notes.

Go for brevity and relevance rather than lengthy explanations.

AHG Case Studies

- Be congruent.
 - Assessment techniques used should be described clearly.
 - Provide a clear report of your findings.
 - Treatment protocols should be appropriate for the patterns revealed by your assessment, and the client's stated goals.

AHG Case Studies

- Avoid
 - Unfiltered, unrelated observations
 - Unsupported disease theories
 - Using a mixed bag of diagnostic techniques
 - Vague case analysis
- Treat the person, not the disease.
 - Don't use generic recommendations for named diseases.
 - Customize formulae and dosages according to the symptoms, the disease and the client's constitution.

Learn More

Download a copy of "*Handbook of Mentoring Guidelines*" from the AHG website.

Customize fully-editable forms and templates for your own practice.

Intake, Informed Consent/Release, Food Diary,
and many more.

Browse the Mentor Directory to find your mentor!

Thank you!

This webinar is sponsored by the American Herbalists Guild.
www.americanherbalistsguild.com

The information provided in this webinar includes contributions from the following AHG members: Bevin Clare, Patricia Kyritsi Howell, Phyllis Light, Rich Mandelbaum, Althea Northage-Orr, Michael Tierra and Benjamin Zappin.

Special thanks to Steven Horne, volunteer coordinator of the AHG Professional Herbalist Training Webinars, and Bryan Bowen, Webinar Committee Chair and member of the AHG Governing Council.
