

## **Welcome to the Teaching Clinic**

Thank you for your interest in this service. I'm dedicated to creating a positive and supportive experience for you. This short document will explain how the teaching clinic works, and what I'll need from you to get started. If you have any additional questions, please reach out and I'll be happy to help.

You can get feedback about your patients in two ways in these calls. If you just want to casually discuss a case, as it relates to Chinese medical theory and its clinical application, then please just come to the call with some notes prepared for yourself. During the call, ask your questions and we will discuss the theory and its clinical uses.

If you have a client that you would like a detailed evaluation of, please have them complete the forms that are in this document, including the "Life History" portion. These forms are necessary for me to be able to provide deeper insight about a specific case.

Please have your patient fill out and return these forms to you. They're an editable PDF and can filled it out electronically or printed and filled it out manually. Please just make sure it's legible.

The "Life History" portion should only be typewritten. Please have your patient spend a few days working on this and really connecting into their life history. This begins the process of them seeing aspects of their journey they may not have seen before, in addition to giving us information we can evaluate during our regularly scheduled call. The more information they provide, the better chance I have of being able to offer valuable insight into their case.

Once you've received the forms, please forward them to me, along with a summary of their case, questions you have, any relevant chart notes (including treatments and formulas), photos of their tongue, etc. Please send multiple pictures of their tongue.

You can also upload all files directly to the Dropbox link I've provided you. If you do this, please just let me know via email so I can access the files and prepare for our call.

*It's important I receive all files for your patient at least  
THREE DAYS BEFORE your regularly scheduled call.*

*Thank you for your interest. I look forward to working with you.*

## Welcome

The purpose of this document is to help me study your case and better help you find your way back to health. Please take a bit of time to reflect on the various questions. The more details you are able to provide, the more likely I am to better understand your health history. This type of reflection can also be enlightening, in and of itself.

Taking an honest look at our history can be one of the most important steps back towards health.

The first part of this paperwork is a snapshot of where you are today – what you are struggling with and what your goals are. The second part is a much more detailed “Life History”. Please take some extra time with this part and provide as much relevant detail as possible.

The forms can be completed electronically or printed and filled out manually. Please make sure they are legible – if I can’t read it, I can’t help you. Please type up the “Life History” and send it to me as an email.

Please only use your first name and last initial on all forms (Jane, D) to maintain your privacy. I’ll know who you are.

## Life Today

Name (first name, last initial only): \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Age: \_\_\_\_\_ Gender: \_\_\_\_\_

Where you live: \_\_\_\_\_

What are you struggling with right now? \_\_\_\_\_

\_\_\_\_\_

What is your primary life concern and goal? \_\_\_\_\_

\_\_\_\_\_

Any other concerns and goals? \_\_\_\_\_

\_\_\_\_\_

In your opinion, what are the primary factors that caused your current situation? Do you feel that there is anything in your life that is keeping you from reaching your goals?

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

What do you feel you need to reach your goals? Is there something you're looking for?

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How long do you expect the process to take? \_\_\_\_\_

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Is there anything you would not be willing to change in your life? Why? \_\_\_\_\_

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What is your current work-life situation? \_\_\_\_\_

How many hours are you working? \_\_\_\_\_ What are your stress levels? \_\_\_\_\_

Are there any areas of your life where you feel disempowered, trapped, or a victim? If so, please explain.

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## LIFE HISTORY

On a separate sheet of paper, please provide a detailed history of life events that have been significant to you. This should include major health problems, life changes, traumas, etc. Include all experiences that stand out in your memory of your life so far. Usually this will include any major health problems or injuries, big changes in your life path (marriage, divorce, career changes), significant financial struggles or gains, significant emotional struggles (anger, depression, fear, anxiety), etc.

Please look at the three sides of your life experiences – ***your physical experiences, your emotional/mental experiences, and your spiritual experiences.*** If you're working through a chronic emotional or spiritual struggle, please include as much information as you can about that process. It may seem like a lot to go back and review these aspects of your life in detail but the more time you spend with this the more I will be able to help you.

***Please include all forms of therapy you have used in your life for this problem*** (acupuncture, massage, counseling/psychotherapy, meditation, shamanic work, etc.). It's important for me to know what you've done, how long you've done it, and how it helped or did not help.

Here is an example of a fictitious life history to give you an idea of what information is helpful. Please use your own wording and group them in five-year blocks. **Thank you for taking the time to do this.**

### EXAMPLE – Jane D, Life History

#### Birth to Age 5

Healthy birth. No known complications. Small birth weight (5 lbs. 6 oz.) Not breast-fed - formula only with signs of allergic reaction. Second child of 4. Oldest daughter. Norman vaccinations for the time.

**Age 1** – Bad chest cold with diagnosis of bronchitis, put on antibiotics

**Age 3** – Sister born, frequent ear infections in left ear.

#### 6 to 10 years

**Age 6** - Diagnosis of asthma with intermittent use of meds. Allergic to medications. Sick often. Frequent stomachaches and constipation.

**Age 10** - Brother born. Mother quite ill afterwards.

#### 11 to 15 years

**Age 11** –Had anxiety around mother's health.

**Age 13** - first case of pneumonia (out of school for 1 month, lost weight). Menstruation started – regular cycle but with severe cramps. Hated my periods

**Age 14** - Got Mono – sick for 10 weeks.

**Age 15** - Frequent bladder infections – treated with antibiotics many times.

**16 to 20 years**

**Age 16** - On birth control pills for acne and to try and temper heavy periods. Intense mood swings. Started to gain weight, which has continued through lifetime. Got my first job. Loved working and being out of the house and feeling independent.

**Age 18** - father died age 47. Chronic bronchitis - felt ill all the time.

**Age 19** – sexually assaulted, no disease contracted. Did not seek therapy to deal with trauma.

**21 to 25 years**

**Age 21** - Beloved grandfather died. Had a bad experience drinking alcohol so I quit drinking. Never used recreational drugs. Loved my job and worked very long hours.

**Age 22** - Entered psychotherapy "something didn't feel right" - not a very good experience. Started doing Zen meditation, found it difficult but somewhat helpful for some of my mood swings. Continue this practice today, usually meditating for 10 minutes per day.

**Age 24** - Started my own business that did very well. I was proud of my success.

**26 to 30 years**

**Age 26** - married, bought first house. Very proud and very happy.

**Age 28** – Had chronic vomiting, consulted with holistic doctor - hypothyroid - Stopped birth control pills.

Economy changed and my business took a hit. We had to close it. It was emotionally devastating and a big financial stress as well. Took 6 months to find another job.

**31 to 35 years -**

**Age 31** – first miscarriage. Continued trying to get pregnant naturally but couldn't. Began to question meaning of life and all the struggles and suffering. Worked with a therapist again but felt it was a waste of time. Quit after 3 months.

**Age 33** – Tried three rounds of IVF but was not able to get pregnant. Wanted to go back to work but was scared to start my own business again.

**Age 34** – referred to acupuncturist to help get pregnant. Finally succeeded!

**Age 35** – had daughter. Birth induced and had C-section. Difficult time recovering from birth – very tired, weakened immune system, lots of body aches, low milk production. Had a lot of anxiety. Couldn't understand why it was so bad.

**36 to 40 years...**

**Age 36** – continued to struggle with regaining my energy levels. My anxiety continued pretty intensely as well along with some anger about having to deal with this. Very frustrating and just can't understand why this is happening to me.

**Age 37** – Want to restart my career but feel I'm not healthy enough to do so. Referred to you for treatment by my best friend.