

Center for Integrative Medicine
Herbal Consultation · Holli Richey, MS, LMSW, MAT
(423) 643-2246 ◦ www.cim.md

Informed Consent & Disclosure

This form is provided to clarify the client/practitioner relationship and to outline my standards of practice as a wellness consultant. With this information, you can make an informed choice concerning whether or not you wish to consult with me, and if you do choose to consult with me, understand each person's role and expectations within the client/practitioner relationship.

The Role of a Wellness Consultant

My goal is to help you achieve the highest state of health and vitality consistent with your own goals. Proper nutrition, herbs, and lifestyle choices are in essence "adaptive," helping support the structure and function of the body. My practice is based on the belief that the human body is a marvelous system that is innately self-healing – and that the proper use of whole foods, herbs and lifestyle changes help the body in its effort to return to a healthy state. I neither diagnose nor directly treat disease. Rather, I focus on educating you, the client, on how to best enhance your body's own innate healing capacity.

All client records are confidential. I hold in strict confidence all information gathered and discussed with you in the office, unless you specifically request otherwise. I will only share client information with other healthcare providers that are participating in your care.

I will gladly answer any question regarding my training, credentials and scope of practice. If I feel that your needs and desires are beyond the scope of my training and expertise, I will refer you to another practitioner. I support and encourage your right to consult any practitioner of your choice, especially in the diagnosis and treatment of disease.

Client Rights and Responsibilities

Payment for the consultation is due at the time services are rendered. The Center for Integrative Medicine accepts cash, checks and credit cards. The Center for Integrative Medicine requires pre-payment for telemedicine consultations by Skype, phone or email. Except in emergency situations, you will be charged 50% of the consultation fee for missed appointments without 24 hours notice. Consultations are sometimes covered by insurance: check your policy or with your carrier to see if they will pay. You may purchase herbs and herbal products through the Center for Integrative Medicine. Please note you are not obligated to do so and may purchase your herbs wherever you desire. You, the client, have the right to respectful, courteous care. You can refuse to follow any or all recommendations provided as a result of this consultation. You have the right to choose another practitioner for any reason and to request that any of your health information be disclosed to another practitioner or health care provider.

Herb Safety

The historical record and modern research indicate that the herbs most often used for healthcare have an exceptional safety record. Likewise, confirmed cases of herb and drug interactions are rare. However, adverse events can occur after using any active substance. Herbs should not be used in pregnancy or lactation without expert advice, and if you are to become pregnant, you should stop taking herbs until advice is received. It is also your responsibility to fully disclose any medications currently in use, including other herbs and supplements, so that you can be offered informed advice. Any suggestion that the effect of a drug is being altered by simultaneous use of an herb should be reported directly to all

health professionals involved. It is also advisable to stop taking herbs at least 72 hours before surgical operation, and/or in the event of being prescribed anticoagulants, antiepileptic drugs, and digoxin.

I, _____, have read this document and I understand the nature and extent of the client and practitioner relationship. I hereby voluntarily consent to a wellness consultation. I understand that I am free to discontinue service at any time. I understand that Holli Richey is not a licensed physician and therefore cannot diagnose or treat disease, or prescribe drugs. I understand that an herbal consultation is not a substitute for regular medical care. If I have not already done so, I agree to consult a medical doctor for any serious or life-threatening disease conditions, either for myself or someone under my guardianship.

Client Signature: _____ Date: _____

Parent or Guardian Signature: _____ Date: _____

Practitioner Signature: _____ Date: _____

Center for Integrative Medicine

Holli Richey, MS, LMSW, MAT – Clinical Herbalist

Herbal Medicine Wellness Consultation – New Client Questionnaire

Please answer the questions below. Your answers assist in determining the best possible clinical assessment. Please allow 30-45 minutes to complete this questionnaire. Please PRINT.

*****Please bring all supplements & medications (OTC/prescribed) with you to your first consultation*****

Today's Date _____

Name _____ Address _____

Telephone Day _____ Night _____ E mail: _____

Emergency Contact: _____ Best way to contact you: _____

Date of Birth _____ Age _____ Place of Birth _____ Height & Weight _____

Where and when have you lived or traveled outside the U.S. and Canada? _____

Education: _____ Passions/Interests: _____

Occupation _____ How long _____ Relationship Status: _____

What are your primary reasons for having a Wellness Consultation?

1. _____
2. _____
3. _____

What other health-related issues do you have/have you had in the past?

Are you currently working with any other health care practitioners? _____

Family: ethnicity/nationality _____

Relationship Alive/Deceased Present health or cause of death

Father	_____	_____
Mother	_____	_____
Brothers	_____	_____
Sisters	_____	_____
Children/ages	_____	_____
	_____	_____

Have you or any blood relatives had any of the following? (Circle those that apply to family members, check those that apply to you)

<input type="checkbox"/> Allergy/Asthma	<input type="checkbox"/> Headaches/Migraines	<input type="checkbox"/> Stroke
<input type="checkbox"/> Arthritis	<input type="checkbox"/> Heart Disease	<input type="checkbox"/> Substance abuse
<input type="checkbox"/> Bleeding/Clotting Tendency	<input type="checkbox"/> High Blood Pressure	<input type="checkbox"/> Thyroid Disease
<input type="checkbox"/> Cancer	<input type="checkbox"/> Kidney Disease	<input type="checkbox"/> Tuberculosis
<input type="checkbox"/> Diabetes	<input type="checkbox"/> Obesity	Other

Please check boxes & indicate how often you use the following (daily, weekly, monthly, etc)

<input type="radio"/> Dairy products	<input type="radio"/> Soy products	<input type="radio"/> Fruits
<input type="radio"/> Soft drinks	<input type="radio"/> Fish	<input type="radio"/> Alcohol
<input type="radio"/> Margarine	<input type="radio"/> Bakery goods	<input type="radio"/> Red Meat
<input type="radio"/> Butter	<input type="radio"/> Nuts & Seeds	<input type="radio"/> Fried foods
<input type="radio"/> Coffee	<input type="radio"/> Vegetables	<input type="radio"/> Water
<input type="radio"/> Tobacco	<input type="radio"/> "junk food" type:	

How often do you eat at restaurants? _____ How often do you cook/prepare food? _____
 How many meals do you eat a day? _____ How often do you snack & when? _____
 What foods do you crave? _____
 Are you allergic or sensitive to any substances? _____
 Have you had lengthy exposure to environmental toxins? _____
 Do you follow or have you ever followed a restricted diet? Which one(s)? _____

Please indicate an example of (1) your diet when you have time and energy to prepare meals and (2) a typical diet when stressed or pressed for time. Please include beverages.

(1): Breakfast	Lunch	Dinner	Snack (time of day)
(2): Breakfast	Lunch	Dinner	Snack (Time of day)

Medications currently or previously used (Over the counter and prescription)

Name	Dosage / Frequency/Duration	For what reason are you taking this?

Supplements/vitamins/herbs currently used

Name	Dosage / Frequency/Duration	For what reason are you taking this?

General Health Questions

Highest weight as an adult: _____ Year: _____ Lowest weight as an adult: _____ Year: _____

Are you satisfied with your energy levels? Yes Sometimes No

Do you have regular bowel movements? Yes No

How many bowel movements do you have per day? _____ Per week? _____

Is it ever difficult to move your bowels?

Typical hours spent watching TV per day _____ Typical hours on the computer per day _____

Exercise –type/frequency/for how long _____

Typical bedtime _____ Typical hours asleep _____ Do you feel rested upon waking? _____

Are you satisfied with your primary relationship and/or your support system? _____

On a scale from 1 (low) to 10 (high), how stressful is your: Work? _____ Health status? _____ Social/family situation? _____

What would you describe as the dominant emotions in your life right now?

Reproductive History

For Men and Women:

Are you currently sexually active? _____

Forms of birth control used (Mark C for currently, and P for past)

- Oral contraceptives Diaphragm Fertility Awareness
- IUD Tubal ligation/vasectomy Patch
- Condoms Withdrawal Other (specify): _____

For Women:*

Have you experienced any of the following:

<input type="checkbox"/> breast abnormalities
<input type="checkbox"/> endometriosis
<input type="checkbox"/> fibroids
<input type="checkbox"/> low libido

<input type="checkbox"/> ovarian cysts/PCOS
<input type="checkbox"/> painful intercourse
<input type="checkbox"/> painful orgasm
<input type="checkbox"/> sexually transmitted disease

<input type="checkbox"/> vaginal dryness
<input type="checkbox"/> vaginal infection

Have you ever had an abnormal Pap smear? Yes No

If yes, please provide the date(s): _____

What steps were taken as a result? _____

Are you now pregnant? _____

Are you actively trying to conceive? _____ How long have you been trying? _____

Are you currently breastfeeding? _____

Are you currently on hormone replacement therapy (HRT)? _____ Have you ever been on HRT? _____

Do you currently do a monthly breast self-exam? _____

Date of last menstrual period: _____

Pregnancies (please include losses/terminations)

Year	Vaginal/C section	Sex	Complications/Other things you want to mention

* If you discover that you are pregnant during the course of our work together, please discontinue all herbal supplements and schedule an appointment so that we can discuss your herbal options *

For men:

__ blood in semen	__ urinary dribbling	__ pain or swelling in testicles
__ burning on ejaculation	__ sexually transmitted disease	__ penis discharge
__ low libido	__ vasectomy	__ painful orgasm/ intercourse
__ prostate pain		

Have you experienced any of the following?

Is it ever difficult to get your urine flowing? _____

Do you often have trouble achieving or maintaining an erection? _____

In each row, please read across the three columns and circle the box(es) that best describe you. You may circle more than one box per row.

General	Need solitude when stressed	Need action when stressed	Need people when stressed
	Variable energy	Consistent high energy	Slow to start
	Tendency toward being cold	Tendency toward being warm	
	Love to travel	Action oriented	Love to stay home
	Lose weight easily	Maintain weight easily	Gain weight easily
Mind	Live in future	Live in present	Live in past
	Creative	Bold, Courageous	Calm
When stressed, tendency toward-	fear/anxiety	Quick to anger	Despondency
	Difficulty focusing	Focused mind	
	Emotions difficult to control	Controlled emotions	Not much variance in emotions
	Variable sleep	Deep, but short sleep	Deep sleep
	Wake easily	Generally wake refreshed	Generally waking is difficult
	Love privacy	Love risk and adventure	Love affection and approval
Memory:	Good short-term; poor long-term	Detail oriented	Good long-term; poor short-term
Renal/Bladder	Frequent dizziness on standing/ low blood pressure		
	Frequently thirsty (fluids "run right through")	Hot weather aggravates urinary symptoms	Infrequent thirst
	Urgent need to urinate when nervous	Infrequent urination in hot weather	
	Urine almost always clear	Urine usually yellow	Urine often cloudy
	Frequent urination		Urinate infrequently; large volume
	Prefer moist environment		Prefer dry environment
	Crave salt		Feel worse when using salt
Respiratory	Respiratory tract easily irritated by dry air		Respiratory. tract feels better with spicy food
	Respiratory tract easily irritated by smoke/irritants	Respiratory. symptoms worse in hot air/environments	Respiratory. symptoms worse in cool/damp air
	Nasal passages often feel dry	Respiratory tract feels inflamed ("hot, burning, irritated")	Nasal passages or sinuses feel full or swollen
	Shallow breather		Infection tends to settle in lungs
	Hyperventilate/forget to breathe when stressed	Frequent yellow or green mucus	Frequent clear/white mucus
Female Reproductive	Menses irregular	Menses predictable	Constipation before menses

	Sharp, stabbing cramps	Loose stools with menses	Pressing, dull, aching cramps
	Fatigue with menses		Water retention before menses
	Menses starts with red blood		Menses starts with brown blood/spotting
Skin	Skin is cool & dry	Skin is warm & moist	Skin is cool & moist
	Skin is thin & flaky	Skin is firm	Skin is soft & smooth
	Dry hair & scalp	Thin hair, tends toward oily, may have receding hair line	Thick, shiny hair
	Lips chap easily		
	Nails brittle/cracked	Soft, flexible nails	Strong, thick nails
	Burn easily in sun	Tan easily in sun	
	Skin is worse in winter	Skin is worse in summer	Skin is worse in damp
		Skin is red & easily inflamed	
Gastrointestinal System	Variable appetite	Strong, demanding hunger	Predictable appetite
	Dry, pebbly stools	Loose and regular stools	Sluggish or regular bowels
	Alternating constipation/diarrhea	Burning sensation after eating	Feel heavy/stuck after eating
	Frequent gas, painful	Yellowish/light brown stools	Foul-smelling gas
	Quick defecation after eating	Think of food as fuel to keep going	Eat to calm down
	Difficulty digesting heavy foods	Strong digestion	
	Need to eat frequently		Feel good on only one or two meals a day
	Often forget to eat		
Cardiovascular	Rapid, erratic pulse	Strong pulse	Slow pulse, steady
	Cold hands & feet	Feels warm/ hot most of the time	Tendency toward edema, stagnation
	Difficulty adjusting to temperatures		
	Heart palpitations when stressed		
	Frequent low blood pressure		
Immune	Complete exhaustion when ill	Attempt to work through illness	Take time off for slightest hint of illness
	Recuperation from illness variable	Recuperate quickly after illness	Recuperate slowly after illness
	Inflammation comes and goes	Easily inflamed, resolves quickly	Inflammation resolves slowly
		Arthritis worse with heat	Arthritis/rheumatism worse with cold

Please check anything you have noticed in the past year. Any issues that you had previously, but no longer have, mark with a "P"

<input type="checkbox"/> Bruise easily	<input type="checkbox"/> Frequent cold sores	<input type="checkbox"/> Incontinence	<input type="checkbox"/> Respiratory issues
<input type="checkbox"/> Chemical sensitivity	<input type="checkbox"/> Frequent diarrhea	<input type="checkbox"/> Lyme Disease	<input type="checkbox"/> Seizures
<input type="checkbox"/> Chest pains	<input type="checkbox"/> Frequent gas	<input type="checkbox"/> Memory Loss	<input type="checkbox"/> Sinus Infections
<input type="checkbox"/> Chronic fatigue	<input type="checkbox"/> Gum problems	<input type="checkbox"/> Nausea	<input type="checkbox"/> Shingles
<input type="checkbox"/> Depression	<input type="checkbox"/> Hearing issues	<input type="checkbox"/> Night sweats	<input type="checkbox"/> Skin rashes
<input type="checkbox"/> Digestive issues	<input type="checkbox"/> Heart palpitations	<input type="checkbox"/> Nose bleeds	<input type="checkbox"/> Swollen glands
<input type="checkbox"/> Earaches	<input type="checkbox"/> Heartburn/GERD	<input type="checkbox"/> Numbness	<input type="checkbox"/> Tinnitus (ringing in ears)
<input type="checkbox"/> Eczema/Psoriasis	<input type="checkbox"/> Low blood sugar	<input type="checkbox"/> Phobias	<input type="checkbox"/> Ulcers
<input type="checkbox"/> Fainting		<input type="checkbox"/> Poor concentration	<input type="checkbox"/> Urinary tract infection

Please list major events in the last ten years of your life and the dates they occurred (include births, deaths, marriages, divorce, accidents, moves, jobs changes, miscarriages, illness and anything else you feel greatly impacted your life)

Date

Event

Additional things you'd like to mention related to health and well-being: