



Herbal Energetics and Formula Creation

Transcript – Lesson 9

Alright, guys, you made it. It's the last module. This one's going to be a little different. There's not going to be an exploration of an herbal flavor profile or an herbal remedy because you guys are going to put all of your new-found knowledge and skills together in creating actual formulas for actual cases in this module. Yay. Let's get going. So, after this module, you should be able to do an intake on yourself or someone else assess their health issue energetically and create and build an herbal formula based upon the techniques we've learned. But again, these should always be implemented in light of a holistic view of all of the many things that can be contributing to a health issue.

Okay, so creating an actual energetic base herbal formula is going to have three steps. The first step is assessing the energetic of the health issue. This is going to be hot versus cold, dry versus damp, tense versus lax. The energetic of this health issue may be different from the innate constitution of the person. Like for example, I am constitutionally hot and dry, but I may have a health issue that's cold and damp. What we're interested in in this formula is assessing the energetic of the health issue. So, if I'm usually hot and dry, but right now with this illness, I'm cold and damp. Then the assessment is cold and damp. The energetic state of the health issue may be different for different organ systems. You can have cold and damp digestion and have hot and dry nervous system or dry and cold urinary system and hot and tense digestion.

So, keep in mind that it can get complex and that's okay because different primary actions will have different herbs for different organ systems and they can all be in the same formula or you can take multiple formulas if different organ systems have different energetic states. So, as you're building your formula and you're writing down your assessment, you would just say digestion and then parentheses hot and damp comma, nervous system, parentheses dry and cold or whatever it is, right? In the assessment, you're just writing down everything you assess about the energetic state of the health issue. And if it's different for the different organ systems, note that. It also might be different for different tissues in the same organ system. So, if we're talking about the musculatory system, you can have tension locally while laxity systemically and that's just an example I'm pulling out of the air, but you can also note systemic versus local, acute versus chronic.

There are no rules here. Just assess the energetics that you see and if it gets a little complex, just make note of that. Also, you may not always have an assessment on all three of the energetic axes. You may, someone may be presenting just hot or just damp or hot, intense, but nothing really on the dry or damp axis. So, the mixing and matching also has no rules. You just assess what is happening and what's happening is what's happening, right? Body in health issues don't read books. So, there's not always ... there's no rules. It's just you assess what you see and what you know, the best way that you can. So, step one, write the assessment and you literally write the word assessment colon and then the energetic state of the health issue.

Step two is to build the protocol. By building the protocol, you're making note of the general herbal actions that you need and you're going to follow the technique that we've been doing this whole course. So, you'll literally write the word protocol down and under protocol, you'll literally write foundational actions, colon, primary actions, colon and secondary actions, colon. The foundational actions will be the balancing energetics of whatever the health issue energetics were. So, if the health issue energetics were hot, cold, I mean, sorry, hot, dry and tense, the foundational energetics are going to be cooling, moistening and relaxing, right? And those are the foundational actions you're looking

for. It's really just the balancing foundational actions and if you like, you can put the herbal taste in parentheses, but you don't necessarily need that. It's really writing down which of the balancing herbal actions on the hot versus cold, dry versus damp, tense versus lax or relaxing scale you're going to need.

Then the primary actions are going to be the organ-specific actions based upon the health issue that the person is presenting. And the secondary actions are going to be the end results you're looking for. So, it's really just putting into practice what we've been learning in all of the modules. So, in your head, you should be visualizing a piece of paper, right, where you're writing the word assessment and then writing the energetic assessment of the health issue. Then writing the word protocol, foundational primary and secondary, and then defining the foundational energetics you need, defining the primary actions you need, and defining the secondary actions you need. So, you're not looking anything up yet, really, you're not looking at specific herbs right now. You're just building or defining the herbal actions that you're going to need in your protocol.

After you have assessed the energetics of the health issue and you've defined the herbal actions, you're going to need in your protocol based upon those energetics, then you start your research. Now you're going to start your research with looking up herbs with your primary actions or even herbs with your secondary actions. However, as you're reading the descriptions of these herbs, you're always going to look for those foundational energetic descriptions within the descriptions of those herbs. So, you're not just going to look up anti-inflammatories, you're going to look up cooling, moistening, relaxing anti-inflammatories, right? So, you're going to do the research at the primary or secondary action level, but then be looking for the herbs with the foundational actions that you described that you're going to need to balance the energetics of the health issue. If that's not promising, you can move to researching the foundational action. Like you can look up all demulcent herbs or all aromatic herbs or all astringent herbs and then reading those, look for the primary action like diuretic astringents or expectorant demulcents that can also be promising. I found it goes faster doing the way I described previously, but this may also be helpful if you know, the first thing you did didn't work out.

Something to keep in mind with the secondary actions like anti-inflammatory, antispasmodic, analgesic, sometimes those might be listed in the actions of that herb, but sometimes like anti-inflammatory can happen just by moistening dry tissues. And it may not say anti-inflammatory next to that herb, right, so keep that in mind. It may not have that secondary action listed; it may. Also, you may find one herb with all of your foundational and primary actions, but you may not and why it's called a formula, so as long as you're in formula has all of your foundational primary and secondary actions in it, then that's what you're going for. There might be times where the perfect herb, like you, read it and you're like, this is it, this is the herb for this person, but it has an opposite energetic then the foundational actions you're looking for, it's okay to use that herb. You'll just add balancing herbs, so like let's say you're looking for a moistening herb, but you find this perfect herb that's drying. Okay, fine. Use it, but then add a moistening herb to that formula. This will make more sense, I think when I go through an example, and when you start to look at actual case studies, but this is the general technique or structure that you're going to follow as you build every single formula.

So, for example, let's say a client comes to me with urinary issues and through intake, I assess them as having dry, intense urinary system; that's my assessment. So, I write it like I did here next to the word assessment. Then for my protocol, foundationally I'm going to need moistening energetics to balance the dryness and I'm going to need relaxing energetics to balance that tension in the urinary system. Now, I know that I'm going to need those more mucilaginous demulcents for my moistening, not really the adaptogen demulcent. So, I went ahead and put demulcent next to moistening and I know that aromatics are excreted through the urinary system as opposed to bitters. So, I'm going to use aromatics for my relaxing as opposed to the bitter, relaxing herbs or any of the other herbal categories we mentioned in the relaxing or in the tense module. So, I've put those foundational sensorial organoleptic descriptions there.

For primary action, I know I'm going to need a diuretic cause we're dealing with the urinary system for secondary action. I know I want anti-inflammatory; I know I want antispasmodic to ease the tension. Those are the outcomes I want. So,

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then I'm going to start researching herbs and doses. I may start with antispasmodics, but I think I will actually be more successful starting with diuretics and as I research each diuretic herb at this link, and I'll put this link in your resources and I'll walk through what this link looks like and you saw it in module two already actually, but as I start to look up diuretic herbs, I'm looking for moistening diuretics, relaxing or aromatic or demulcent diuretics. It's going to be the same, right? And I'm also looking for the word antispasmodic. I want antispasmodic diuretics, aromatic or relaxing, diuretics demulcent or moistening diuretics. I may not see all of those words, but I will at least see either moistening or demulcent or either aromatic or relaxing. And we learn if something is aromatic, it's also relaxing. If something is aromatic, it's also antispasmodic. So, if it's only described as an aromatic diuretic, I already know, "Oh, aromatics are relaxing. Oh, aromatics are antispasmodic." So, it's okay if it doesn't say those words in the description of the herb. So, you're really pulling all the puzzle pieces together about what the tastes of the herbs mean as you're doing this research.

So, this is the link from the previous slide. This is really where you should start your research and you'll have to type this into the URL or copy and paste it into the URL box. You can't just search for the herbal energetic page at Rosalee's herbalremediesadvice.org. So, keep this URL safe and easily accessible. So, let's pretend I did start with anti-inflammatory herbs. So, I might go down and click every single one of these anti-inflammatory herbs and look for moistening and relaxing diuretic described next to these anti-inflammatory herbs. So, let's just start at the top with turmeric and see what that would've looked like.

Alright, so we see turmeric is pungent, that's another word for aromatic, but it's also bitter, so pungent and bitter together. That's going to be really, really drying, so that's not what I need, even though it's anti-inflammatory. And even though, let's see if diuretic is even on here, oh, even though it's anti-inflammatory and antispasmodic, which are the end results we're looking for, it doesn't have the energetics we're looking for. It's also not a diuretic. So, it doesn't even have the primary action we're looking for. So just because you have inflammation doesn't mean you need turmeric, right? This isn't the herb we're looking for. So now I go back to the original list of anti-inflammatories and I keep going down the list.

So, let's say we keep going down the list of anti-inflammatory herbs and reading their descriptions and nothing really pops out at you and then you get to this one and you notice that it's moistening. You also notice that it's demulcent. Now here's the thing. If the description only said demulcent, then you know that it's moistening and cooling cause what demulcent means, right? Or if it only said cooling and moistening than it didn't have to say demulcent cause they're interchangeable, but this happens to say both. So, we're reading along and we're like, "Oh, it's also a diuretic." So, this is an anti-inflammatory demulcent diuretic. It has our primary action, it has our secondary action, and it has our foundational action. So, this meets the requirement of an herb that we're going to put in our formula. However, this does it say it's particularly relaxing, right?

It's not aromatic. It's not a relaxant. So, this means we're not done with our formula, but now we can maybe go to the list of diuretics and see which one is aromatic. Now here's the thing that's gonna happen; in general aromatics or drying and we said we wanted moistening. So, if you can find a moistening, aromatic diuretic, that would be perfect. However, you're probably going to find a drying, aromatic diuretic and what you would do then, is just increase the amount of marshmallow root in the formula so that the formula is more moistening, but still relaxing from the aromatic relaxants. And that's how you build this formula and on whatever the description of the herb is, it will have the dose of that herb and how you make that herb and the frequency you need to take that herb. So, you would write all of those down in a cool little table that I'm going to show you in a few slides.

So, I'm bringing this back from a previous module. This is a list of all of the tastes and remember the tastes also tell you something about energetics. Most of the aromatics or pungents are warming and drying. Some of them or cooling and drying. Fenugreek happens to also be moistening. You know bitters are cooling and drying except for the aromatic bitters which are warming and drying. The astringents are always tightening and toning. The acrids are always relaxing and sedating. Sweet is either demulcent via adaptogen or via mucilage, right? Salty is always nutritive. So, use these

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terms to maybe help you pinpoint specific herbs to go and research if the web page source that I used before in my example isn't giving you what you're looking for, but make sure always when you're researching herbs do it either in a clinical herbal book or from a reputable herbalist that I gave you guys in your resources way back in module one.

Okay, so here's the cool little table I told you about and this is really where your formula is going to come to life where you're adding your herbs and doses to the protocol recommendations. So, remember I said that as long as your formula includes all of the foundational primary secondary actions listed in your protocol, then you're good. Well, this table is how you keep up with that. So, I need a moistening relaxing diuretic that's also anti-inflammatory and antispasmodic. So, I would list my herbs by name down the left side and list which of those actions that herbs satisfies under action. So, we said that marshmallow root was diuretic, anti-inflammatory, and demulcent. So that would be herb one and I'm going to take that herb based on the recommended dose. So, I'd put that under dose. The method is how you make it, so marshmallow root is best extracted as a cold tea.

I'm going to steep it 30 minutes, even longer, then I'm going to strain it and then duration is just how long you're going to take it. So, herb number two would be my aromatic antispasmodic. Whatever that herb name is, I would look up the dose, the method. Preferably this is all going to be as one single formula, so aromatics and demulcents can both be made into teas. So that's probably how I'm going to do this. But depending on the issue, the protocol, the formula, you can have different formulas. Like you could have an external formula and an internal formula, right? Or you can have a tea and a tincture. Really whatever you or the client is willing to do that's the best way and remember everything we learned from module one about how different constituents or taste are best extracted. So, you don't want to use a tincture for the mucilage in marshmallow root, but you could totally use a tincture for the aromatic if you prefer tinctures. So just pick whatever you or the client is willing to do that also makes a powerful medicine and that's what you put in this table and now this table is your formula. And as long as you look down the list of actions and those actions perfectly match which in your protocol, well now you have an energetically based formula.

So, to recap for the cases that you guys going to practice on the following slides, you're going to write down these three steps; assessment, protocol, and then your table of actual herbs. Next to assessment, you're going to write the energetic of the health issue that I present to you. In the protocol, you're going to find the foundational herbal actions that balance that assessment, and then the primary actions that relate to the organ systems for the client and then the secondary actions for the outcomes that you want for the client. Then you are going to research and find herbs that match those foundational herbal actions and primary herbal actions and find the doses and the correct methods of taking herbal remedies with those herbs and you're going to fill it in in the table. And the end goal is to make sure that actions listed in the table match the actions that you said you need in the protocol.

So, I just have three herbs on here. That doesn't mean you can't have one herb. It doesn't mean you can't have 15 herbs. Um, so really your tables can include however many herbs you want. But in general, what I find is that with actual real people, with real clients, the fewer herbs that can give them all of these actions, the better because they have to buy the herbs, they have to make the herbal remedies, et cetera. But again, you've got some pretty advanced Chinese medicine herbal formulas, or even Ayurveda formulas with 15 herbs in them, right? So that's up to you. As long as the actions match the actions in your protocol and the actions in your protocol are really energetically based off balancing the energetics of the health issue of your client. All right, are you ready? Here we go.

Okay, so client number one is having a bowel movement, one bowel movement every four to eight days. When they do have a bowel movement, it's painful and scratchy. When they aren't having a bowel movement, they're experiencing gas, bloating, and cramping every time after eating. So now write down what is your assessment? what is your protocol of foundational primary and secondary actions? And then do your research and create a formula complete with doses. Client number two is emotionally very volatile and loud and easily frustrated. This client has frequent neck pain and headaches. This client also easily sweats and has oily skin and oily hair. So, what is your assessment of the health issue?

What is your protocol's foundational primary and secondary actions? And what herbs are going to be in your formula, complete with doses and method and duration, right? Fill out the table for this one and the previous one.

Client number three has burning with urination, is experiencing incontinence. That means frequent uncontrolled urination or like leaky urination and then frequent fevers. So, what is your assessment? What are the foundational primary and secondary actions of your protocol? And then fill in the table with actual herbs for an actual formula, okay? And client number four. So, this client has chronic, dull, muscular pain and has had it for many years, but then has sharp pain in the joint when moving. This client has also experienced frequent toxic exposure from their job for many decades. So, what is your assessment of the health issue? What are the foundational primary and secondary actions you're going to need for this client? And what is your actual formula?

Alright guys, so you did it. Once you're done with that homework, you have completed this course. And what I'm gonna do is I'm gonna provide a sort of cheat sheet for you to look at after you create your formula that includes my assessment and my protocol. I'm not going to include herbs because there's so much redundancy in nature. It's super awesome that even if I did provide my herbal protocol, there's no way it would ever match your herbal protocol, right? That's one of the beauties of it, but what you really want to make sure and match is the assessment and quite possibly the protocol, the foundational primary and secondary actions. But I will tell you this, those might not always be exactly the same. I'll explain my assessment, but if you have a different explanation for a different energetic state that makes, you know, that makes sense with the training you've received, that's totally fine. Energetics is sometimes pretty subjective and so you have to trial and error and if one energetic formula assessment doesn't work, then think about it and think about the puzzle and maybe rearrange the puzzle and create a different formula for a different energetic state and that's okay. So, I am going to give you a cheat seat, but if you don't match it perfectly, that's okay, right? Just think about it. And I am super excited you guys took this course. I'm excited for your energetic formula building and I hope you enjoyed it.

If you really enjoyed this course and you want to learn more with me, you can check out the Hill College Holistic Wellness Pathway. This is the only program like it in the entire country. It is a program that I created within the Associate of Science Biology degree Pathway that is board certified by two different national boards, the Holistic Nutrition Board and the Holistic Wellness Coaching Board. We also include all of the requirements for a third national board, the American Herbalist Guild. What this means is students can come to this program, it's either in person or 100% online if you're out of state, and upon completing the six holistic wellness courses, you are eligible to apply to these three different national holistic boards. The degree's optional. If you already have a degree, you can come and just take the six holistic courses. If you don't already have a degree and you don't want one, you can still just come and take the six holistic courses or you can get the degree if you want to.

And when I say come and take the courses, what I really mean is you can apply and register. You'd never have to come to campus. Many of my students are out of state. So, the program can be done 100% online or you can come to the in-person classes. It's completely up to you. It's customizable. Also, we're the only herbal program that includes not only the educational components required by the American Herbalist Guild, but we also include the clinical requirements. Usually, you have to get those outside of whatever herbal school you attend. So, two out of the six classes are clinical classes where you learn to and actually see clients one on one for the 400 clinical hours required by both the American Herbalists Guild and the 500 hours required by the Holistic Nutrition Board. So, it really is the only one-stop-shop that exists for these three national boards and you learn all of these different components of wellness wrapped into one. So, you can check that out at hillcollege.edu/holistic_wellness or I also see clients. And you can check that out at loriroseholisticdotwordpress.com and I hope to see some of you both in my program and in my clinic. Otherwise, thank you so much for taking this course and have a good one.