

TAKING THE CASE ©

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Date 02/02/02



This short paper is put together to offer an idea and general plan on how to take a case as a practitioner of “Traditional Chinese Acupuncture” or any form of Chinese medicine is it so important to take the patients case with care, thought and precision?

The case is the tool used by the practitioner of acupuncture to assess the environmental, mental, physical and psychological condition of the patient, who is presenting one or more complaints and symptoms.

Accurate and positive action to assist the patient cannot be offered or taken without the use of the following procedures. To do less is possibly irresponsible and could be interpreted by many as unethical. The intention is to be as holistic and honest always, for the benefit of the patient and the practitioner’s own integrity.

Many different tools are mentioned within this short paper with extremely brief explanations as to their uses and how to use them. These tools should be studied on an individual basis, both in theory and practice, to give the practitioner the best opportunity to benefit the patient.

With regard to Health and Safety it is a legal requirement to acquire various details from the patient for your records. These are as follows:

Name;..... Date;

Date of Birth;

Address;

Tel No; Sex:..M / F....

Name of G.P. Present medication. (if any)

Faith; Height; Weight;

Other information required;

Marital status;..... Next of Kin;

No and sex of children;

If younger than 18yrs name of parents or guardian;

Presenting Complaints or Symptoms.....

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To save the practitioners time and the patient's money before going any further. Contra-indications should be ran through. This means that if the patient is under specific types of medication or has certain implants i.e. electrically stimulating, within the physical body, treatment legally cannot be given even when the case has been taken.

Getting a full picture of the patient in three forms is also extremely important, the Reason for this is as follows:

1. The physical history

This is to establish previous medication, which has been prescribed or taken on their own volition and the reason behind that medication. At the same time this must go back to as far as possible. Therefore, this history is required from birth and where possible, any information about hereditary illnesses or major conditions from which the natural parents may have suffered. These include Asthma through to Shingles or Parkinson's disease. The reasons for this will become more evident as we go on.

The second part is to ascertain any physical injuries that may have been suffered from birth to date. These include any major injuries such as broken bones through to physical strains or tears of muscles, cartilage, dislocations of joints and damage to ligaments. Again, these all have a bearing on the whole picture we are trying to establish. This must go through to date as well to asses the type of regular exercise undertaken and the possible strains from the type of work they undertaken, for example, does the patient sit behind a desk all day or drive a vehicle for many hours. Does the job entail a lot of lifting or moving of objects or are they regularly? carrying young children around with one arm and trying to other jobs at the same time?

The third part of this overall picture is to ascertain the emotional side of the patients past. This includes the type of upbringing they have had from whoever raised that person from birth all the way through to the present day. It can include, and should include, the relationship with the persons, parents, or guardians as well as the relationships with brother and sisters if any. The position held within that environment ie: youngest or oldest. What kind of responsibility and at what age was it taken on or given?

We then move on to schooling and the type of life that the patient had at school, with teachers as well as other pupils. From information given the type of employment the patient has under taken to date. The reason for this is to establish the various stresses, strains and pressure, they regularly undergo through the type of work they do, for their employer, being self-employed or work even in the home.

2. Causation

Any patient visiting a practitioner will initially arrive with a complaint.

This is usually a symptom, being expressed by the body in the form of pain (cutting, dull, sharp or stabbing) it may be showing as a rash, swelling, sore throat or even a sleep pattern difficulty. It may be that the patient has extreme bouts of lackluster or great emotional highs and lows.

The body is a very complex machine that is designed to work as one unit. Although there are many individual parts to it, as in organs and different types of tissues, every individual part of the body is there to allow the whole body to function as one. Or as we call it the whole or holistic.

This and one or two other significant rules should always be taken into consideration when establishing the cause. For example, the seven-year rule which is, the body over a seven-year period renews every cell that has ever existed, within the whole of itself. If damage has occurred through a knock, that was subtle at the time and shrugged off, it maybe that a very mild pressure was placed on a parasympathetic or sympathetic nerve, which are both two-way communicators and can be sedated as well as stimulated.

Although that, in itself may not have caused a difficulty over the regeneration period of the body, increased pressure on a physical point can result. This in turn can cause the mind or the collective knowledge of the whole body to be interpreted by the brain as something else, for example the body may have re-grown that part of the nerve and connected to its original destination at a slightly different point. This may result in normal activity of the body placing pressure on the nerve. The brain could then seek to control the result of that pressure by requiring stimulants or suppressants to be ingested. This could be Alcohol, Coffee, Tobacco or in any other form. Either way, on the outside or to the layman, stimulants or an addiction would be apparent, where in actual fact it is not an addiction but a way for the body to control an issue. In practice it could be, and often is found, to be the case that this can be traced back to the original injury and the correct treatment can result in a reduction of symptoms, as well as a major drop in the requirement for the suppressants or stimulants. In nearly all cases tracing the symptoms back to the cause with all the above information becomes not as difficult as it would seem.

Looking physically at the body and using the known diagrams for the pathways of the meridians, nerves, skeletal structure and combinations of muscles as well as the way muscles will act to pull against the bone or tendon to actuate the desired movement. Looked at this way if a person was to injure a foot, the body naturally will limp. The result of this maybe, over a period of time cause the hip or shoulder to miss-align to compensate for balance or uneven weight distribution. Hence treat the foot and the affects should be that the body will re-balance itself and begin to heal and recover.

One other point that should always be explained to the patient if the symptoms are of a bactericidal, fungal or viral nature is that, when the body is balanced and operating correctly as one whole unit. Such opportunistic organism is unable to manifest themselves on or within a healthy body. Therefore, it is only through a weakness within or from a weakness via an external injury that these organisms are able to flourish. Through the action of their own natural functions, of ingestion and secretion which then cause the body further difficulties and more to deal with. for example, the secretions from a viral infection in the lungs will cause the body to produce an abundance of mucus, which in turns will cause the body to have a lower oxygen intake and a worse carbon dioxide release. This will then cause a feeling of weakness and lethargy. The waste products from the multiplying virus get into the blood stream acting as a toxin, which in turn causes the body to raise its temperature internally while sweating and shivering externally. The action of the toxins and low oxygen with higher than normal carbon dioxide levels resulting in headaches and other symptoms. The other action the body will take is to cough, this is for numerous reasons including, clearing the mucus as well as improving the gaseous exchange through the lungs. This is very simply put but offers a common-sense picture to the patient, offering an easily understandable and logical view of why when the body, mind and spirit when in healthy order when nourished correctly, is not usually affected. The organisms mentioned and exist in the environment at all times are unable to manifest within the physical body.

Teaching or explaining exactly why you have gone through this process to the patient often results in the patient remembering other difficulties or injuries which tend to fill in any gaps in the picture, that has already taken shape. The patient will begin to understand the reasons why the body can show peripheral and referred pain. By explaining the reasoning and physicality of this to the patient, it is usually found that the patient is more willing to assist in their own treatment, either with exercises, diet and sometimes with acupressure.

The most important thing is they can understand why they have the symptoms and so how the original cause would give the symptoms they suffer from. The secondary affect is that it tends to inspire confidence in the patient which will increase their own positive energy flow, which intern helps in the natural healing process the practitioner intends to initiate.

When doing this it must be stressed to the patient that as an acupuncturist you can not and will not cure the patient, but what you will do is place their body into state of natural balance, allowing the natural abilities of the body to work correctly again. Thus it is enabled to heal itself!. At this point it is also good to let the patient know or at least explain the laws of cure.

First some general rules for the holistic practitioner.

1. The holistic practitioner does not cure or heal. Their aim is to trigger or assist the patients body to heal itself.
2. The object is to use the absolute minimum stimulation by whatever means to start the healing process.
3. The body must cure itself in a progressive manor.
4. Once the heeling process has started it must be left alone.
5. Follow the direction of cure.

The Five Laws of Cure.

- a). Top to bottom.
- b). Inside to outside.
- c). In reverse order of appearance.
- d). From vital to less vital organs.
- e) Funneling in.

As long as the symptoms follow one or a combination of the above positive progression is being made. So the patient understands the proposed treatment, is specifically designed to re-balance their own body, and is almost always totally individual to themselves. One always hopes that one treatment will be enough, although follow up consultations must be done for over view purposes. These will be looked at later within this paper.

The tools of procedure for the above would be as follows for the practitioner:

1. Observation.

While taking the case it is important for the practitioner to take many variants into consideration. These will include the state of the patient on arrival to the clinic. Is the patient breathing heavily from physical exertion, are they sweating, pale or is the skin dry, damp, hot or cold? What mode of transport has been used to get to you. Is the traffic particularly bad at that time of day? What is the weather like for the time of year and how are they dressed. Dark or bright colors, as this can support the diagnosis with regard to the Chinese Five Element system used during acupuncture and confirm the element, as well as the meridian which is most likely to be blocked or over stimulated.

It is also advisable to use one or two techniques from other therapies such as Cognitive Therapy. If the patient is having difficulty through emotion or is not really willing to talk about some thing or other, it will only become an issue if the practitioner tries to force it.

By using Cognitive Therapy techniques while taking the case and keeping calm, a steady pace and tone can offer the oppertunity to pass over a question the patient has found to be stressful. At some point when the patient has become relaxed over the next few minutes, or during the next few questions, the same

question that was found to be awkward to answer, can be asked in a subtly different way several times. When the patient actually answers the question and comes out with an answer, the practitioner will make a sharp noise or shock the patient. This emphasizes to the patient the importance of opening up, allowing some deeper held emotions to surface. This often results in the patient then releasing much of their inner feelings and anxieties. Offering the practitioner, a greater opportunity with this information, to understand the environment the patient exists within. This point is known as “fixing” when timed properly the patient’s concentration is thrown off balance and information is often very forthcoming. The success of this can be as high as 90% and a great release for the patient.

Neuro Linguistic Programming techniques are also extremely useful - by following the eye and body movement a lot of information can be gained as to how the patient feels emotionally. With regard to certain moments of time in their past, you are asking them to remember. It maybe a time at which they were injured or a point in their lives where a major event took place. The facial expression, hand movements as well as leg and foot movements can also render much information. While making these observations notes can be taken in key word form in the margin of the note pad, offering reminders and patterns of the patient’s reactions to certain events of the past.

2. Asking.

The first thing we must remember is the way we intend to physically ask question. Depending on whether we require a one-word answer, either yes or no, or would we prefer an answer of description. This would require an open question to be asked for example an open question may be “Where and when do you find the complaint to be most aggravating?” This would require a descriptive response offering information verbally as well as physically, as most people will use their hands and body when answering this type of question.

We must always be aware that the practitioner remains in control and does not allow the patient to then use the consultation period as a counseling session. Although a small amount of counseling will always be required. Closed question are simply used to invoke a simple, yes or no when that is the indicator or response required.

The way the practitioner acquires information from the patient is also very important! This is because different individuals have different upbringings, belief systems and ways of life. For example, it would be totally inappropriate to ask a person of the Hindu religion if he or she enjoyed beef products in their diet, the same for a person of the Jewish faith, would be most offended if you were to suggest pork would be a sensible addition to their diet. It would also suggest to the patient that the practitioner was not particularly interested in them, and therefore how can that practitioner honestly be sincere in their intent with regard to helping the patient find or initiate the healing process. So, although taking the case is a methodical process, at all times listening to what has been divulged is most important. While gathering information from the patient, a calm and natural soothing voice should have maintained. This again shows confidence in the practitioner’s ability and is also reassuring for the patient.

The area being used for the consultation should be clean, comfortable, relaxing and warm. If the practitioner has a desk, it is found that the patient will be more forthcoming with information if they are not placed on the opposite side of the desk. Preferably to one side as this helps to remove any psychological barriers, that may well have been built up over years during their life experience.

To assist the flow of the questions being asked, it is best to follow a “Schema” which is a basic pre-set list of questions. The practitioner from their observations will often deviate from the schema as certain questions will be, irrelevant to different individuals as identified by observation.

So, prior to a physical examination, we complete notes on the type of person we are dealing with. For example, in the form of attitude, colour, elemental, emotional, general fitness and exercise routines. The type of work they do, or do not carry out and their willingness for change. A general psychological profile and appreciation as to whether the patient actually would choose to recover, or are they palliating

a more dominant person within their regular environment. During this period the patient can also be assessed on the tone of their voice. It maybe that their voice when speaking is ringing, weepy, sad or happy. All different forms of sound will again assist the practitioner in working out which of the meridians the difficulty lies within.

At the same time, he needs to be looking to asses the patient with regard to Yin and Yang. If for examples the patient is very Yang, we must locate where the Yin is. As always, balance is the key. Once all the above is complete an elemental drawing should be used, to analyze the information already gained using your knowledge and various tables available. It can be assessed as to whether the cycles of the five elements is Generative and correct, or whether we have a control situation i.e. Water to Fire, Fire to Metal, Metal to Wood, Wood to Earth and Earth to Water. It can also be the case that the elements can be destroying themselves ie. Fire over Water, Water over Earth, Earth over Wood, Wood over Metal and Metal over Fire. This should all be assessed before moving on to the examination of the patient.

3. **Palpation.**

Once all the above has been completed a light physical examination should take place. From the information gathered. There will be specific areas of concern that can be mentioned to the patient.

These can be, due the contralateral law, as far as the opposite end of the body in relation to the symptoms complained of. If this is the case, then the reasoning should be explained as well as what you anticipate finding and why.

It maybe an “Asha” point which is an acupuncture point on a meridian line where the flow of “Qi” is blocked. (Qi being the vital energy) It may also be the case, that blemishes, lumps or discolorations are found as markings on the skins surface, as the physical body could be trying to express the difficulty and trying to throw it out, from the body in its own way.

During this examination kinetics can be used in two different ways to gain confirmation for the suspected diagnosis. Firstly, it can be used to confirm allergies to anything that has been mentioned during the taking of the case, (no contact for the patient to the substance is required) Secondly kinetics can be used to confirm or prove a weakness within the patients body. A good look at the patient’s nails will also act as confirmation of many different things. These can include low mineral salts and vitamins, low calcium or zinc, possible tubercular problems. The body is suffering from exhaustion from recent illnesses, malnutrition as well as mineral shortages. Impaired blood circulation or cardiovascular difficulties. They can also offer information on anxiety, hypertension, stress, difficulties with the liver, kidneys and lymphatic system. Many other things can be spotted and confirmed with a short but inquiring glance.

It is also important to check the gate, movement and stance of a person. Cross referencing again can be carried out when the structure and movement is observed, cross referencing again can be carried out. It may become evident that structural work is required, or another form of specialty treatment would be the best tool to initiate the healing process, or a combination of acupuncture, and another specialty would possibly offer a better combination for the patient. As the patient moves, listening and watching is again a crucial requirement.

The twelve pulses will and should confirm any conclusions that have been reached at this point and can again be retaken after treatment to confirm the desired change has been initiated within the patients body.

Final physical confirmations can be made using auricular techniques as well as observations of the tongue. Using the ear, we can confirm diagnosis by probing specific points of the ear. These are well mapped out in many different reference books and are very specific. It is not difficult to follow although every person’s ear has a slightly different shape, it is not difficult to follow. The ear can also be used during treatment as a treatment point, or to reinforce the treatment being carried out else where on the body.

The tongue again can be used during taking the case. Many reference books are available on the subject. Depending on the coating, cracking and dimpling much can be confirmed during the taking of the case. The color of the tongue also offers many clues of the tongue, as well as possible confirmations when taking the case. The colour defines which organ or meridian is at a low, as well as assisting in showing which of the five elements the body is in phase with. For example, if the tongue is black in color it would be associated with the element of water, and so it would be assumed a problem with the Kidneys or Bladder exist. If other things during the consultation have been observed such as, gentleness or fear (being Yin & Yang of each other) or the body scent is putrid, they tend to groan or make the sound of “whooooo” a lot, or prefer the season of winter. It would be expected to include trouble with the Bladder or Kidney functions.

It is at the same time advisable to remember that in all cases if a person is very Yang or very Yin that the opposite still exists. You must find it to be able to rebalance the system. As ever the body can not heal itself unless in balance and the correct environment as well as nourishment is then taken on by the patient.

When asking the patient to move, observation will show limitations of movement, and the facial expression will give the practitioner an idea when it is painful to move. It is also important to establish at what time of day the difficulty or pain is greatest. Explaining during the physical examination the “Chinese” twenty-four-hour clock theory, with regard to Qi flow through each specific meridian, in relation to the Earths movement around the Sun

A brief explanation of the “Mother, Son law” (never punish a sick child) this means wherever possible use the bilateral meridian, to the one blocked. Either the bilateral or the meridian that is Yin or Yang to this, but in the same element with. Which is the contralateral law again.

The meridians have been found to follow the rotation of the earth rather than a lunar cycle such as the tides. This is why in Chinese medicine, and this form of acupuncture it is best to treat a particular meridian when it is at its optimum either yin or yang. This to gain the greatest desired effect. To give a quick idea, the heart meridian is at its most yang at noon and so most yin at midnight, the Small Intestine is most yang at 1400 hrs and most yin at 0200 hrs. The Bladder is most yang at 1600 hrs and therefore yin at 0400 hrs. Obviously this list goes on right through the twelve bilateral meridians.

With all of the above it is essential that the practitioner is well presented and speaks to the patient with clarity and at a level they can understand. The ability to listen, observe and make clear precise notes. The consultation is expected to take up to two hours, so making sure the patient is physically comfortable and at ease as this will assist the practitioner in drawing out the verbal and natural mannerisms that would be displayed by the patient in their regular environment, be it at home work or at play. If the patient is under sixteen then the parent or guardian should be with them at all times, unless the patient requests otherwise and the parent or guardian agrees.

Errors.

As ever it is always possible to make errors, so a few rules of thumb should always be taken into consideration. If unsure at any point of the best treatment, or to the actual cause of the symptoms, seek another opinion.

The “three-legged stool rule” is a great safe guard. When you have come to a conclusion about the original cause of the patient’s symptoms, confirm this diagnosis by at least two other methods.

Many methods are mentioned in this paper and as long as three are used at least and each stands up on its own as valid and solid, then you can be quite sure your diagnosis is correct. Information at some level is missing. If at least three tools of taking the case do not support each other and come to the same conclusion, then information at some level is missing. Treatment must not go ahead.

Always be professional and ensure that any equipment to be used is always clean or sterile depending on the tool or tools that are being used. If unsure about anything recheck your notes and go over the point if necessary with the patient. Safety and integrity for the patient and practitioner is essential at all times, as well as a well displayed copy of valid insurance certificate for the practice.

Secondary Consultation. After the first treatment given, a follow up appointment should be made. Usually this would be arranged for a month to six weeks after the first treatment.

The patient should feel welcome to be able to arrange an earlier appointment if an adverse reaction has taken place. When the patient visits, the practitioner should have taken time, to reacquaint themselves with the case records kept on file. Once this has been done, a brief consultation should take place. Remembering the five laws of cure and revising the case with the patient. It may be that the patient is progressing well, then no treatment is required. This would be the best possible result. Then also the patient may only require a few suggestions to assist the process of healing. For example, the diet may have altered since the original treatment, as the body requires different nutrients to enable the required repair. So, assistance and cooperation from the patient is necessary. It is also essential to find out what changes have occurred over the weeks since treatment, anything from a physical accident, through to increased or decreased stress levels at work or in the home. These stresses again must be thought of in environmental, mental and physical terms, all will, and do alter and change every second. So it is very important to include them during the follow up case. If no further treatment is required, the patient should be given a brief resume of the situation ensuring they leave with a positive attitude.

If however a further treatment is required a short consultation should be gone over, sticking to key points. It should take no longer than twenty minutes or so, but as ever observation of the physical body, its reactions to stimulus are essential. Again, color of the skin and colour of clothing will offer many clues. The patients progress in healing with regard to the five elements, which cycle or which element the body is indicating must be taken into consideration. The skin odour, breath and tongue color should all be rechecked against previous notes. This again will give information regarding the five elements and the seasonal affects to the patient's body.

The last thing we must also remember in this form of medicine is "It is, unless it is not".

This is to say that there is no final rule of right or wrong. All patients and persons are different. So, the same treatment to enable the body to heal itself will never be exactly the same. Great care must have taken to remember this. Everybody is an individual, with different experiences from their environment, mental, physical and psychologically which force different actions and reactions from an individual. Although past experience will cause some patterns to develop no one body or person will ever react to stimulus in exactly the same way. It must be taken into consideration that all forms of medication are in actual fact a form of stimulation or sedation- this is the final "Dichotomy" of taking the case.

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