Patients & Physicians

The patients and Physicians window presents options for managing your patients' information, treatment records and much more. It is also possible to manage the physicians' information and security.

Patients List: the complete patients' list is in the table on the left side of the window. Selecting any of the names will present the patient's information on the top right side of the window, along with any treatment sessions existing for that patient.

Right-click on any patient name in the list to get a menu for quick access to some of the main functions, such as adding or editing a patient, creating new invoice or accepting payment from that patient and more.

The panel on the top right lists the information of the selected patient. It is possible to click the email address in order to automatically open the default email application. Please note the default email application has to be correctly set on the operating system in order for this option to work.

Treatment Sessions: this part is where the physician can write any necessary information when treating the patient.

Note: the sessions are added automatically when setting an appointment in the scheduling window.

Each appointment that was set in the scheduling window will appear as one session. The tab on the top of that session will show the date of the appointment.
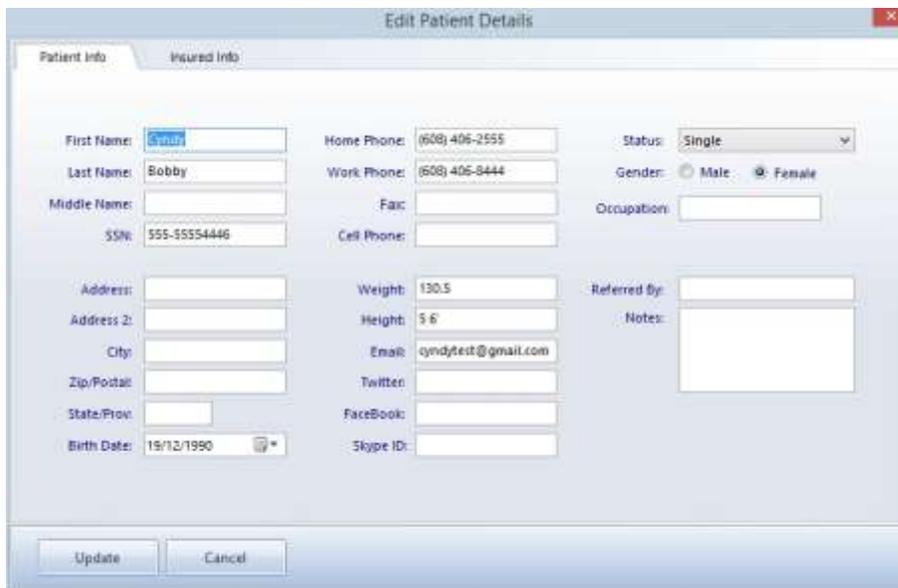
The session editor provides rich-text ability (RTF) using the toolbar at the bottom or the various standard keyboard shortcuts.

Note: once a change is made, such as adding new text or formatting text, it is important to click the Save Document button, found just above the editor.

This button is enabled when a change is made, and is disabled (grayed) after the new text is saved. Since the text is also saved automatically from time to time, for example, when clicking the sessions tabs and changing to another session of the same patient, the button will be disabled by itself, adjusting to the automatic save action. PatientBooks will try to save the changes automatically when needed but to be sure not to lose any newly inserted text it is always a good idea to click Save Document.

To open any or all of the sessions in ms-word document, or delete the session, right click the tab of a session and choose from the popup menu.

Add / Edit / Delete Patient: click, or right-click over any patient name in the list to add a new patient, edit, or delete the selected patient.

Export patients: the Manage Patients button on the top toolbar also presents the Export Patients menu, to allow exporting the list in the following formats: Html, Text, Comma Separated Text, Tab-Separated Text, SYLK. Either the Comma Separated Text or SYLK formats can be used in order to export the list to Excel.

You can Email or Archive a patient by using the right-click popup menu. It is also possible to email a patient by simply clicking the email address that appears in the patient information on the top right side of the window. Please note that the default email program should be set correctly in windows in order for this option to work.

Questionnaire: patient medical questionnaire is used to analyze a patient's medical condition. It includes family health, medical history, habits, nutrition, medical tests, and specific medical problems.

Click the Questionnaire button on the top toolbar and select Manage Questionnaire, or right click over the selected patient from the list and choose Manage Questionnaire from the popup menu:
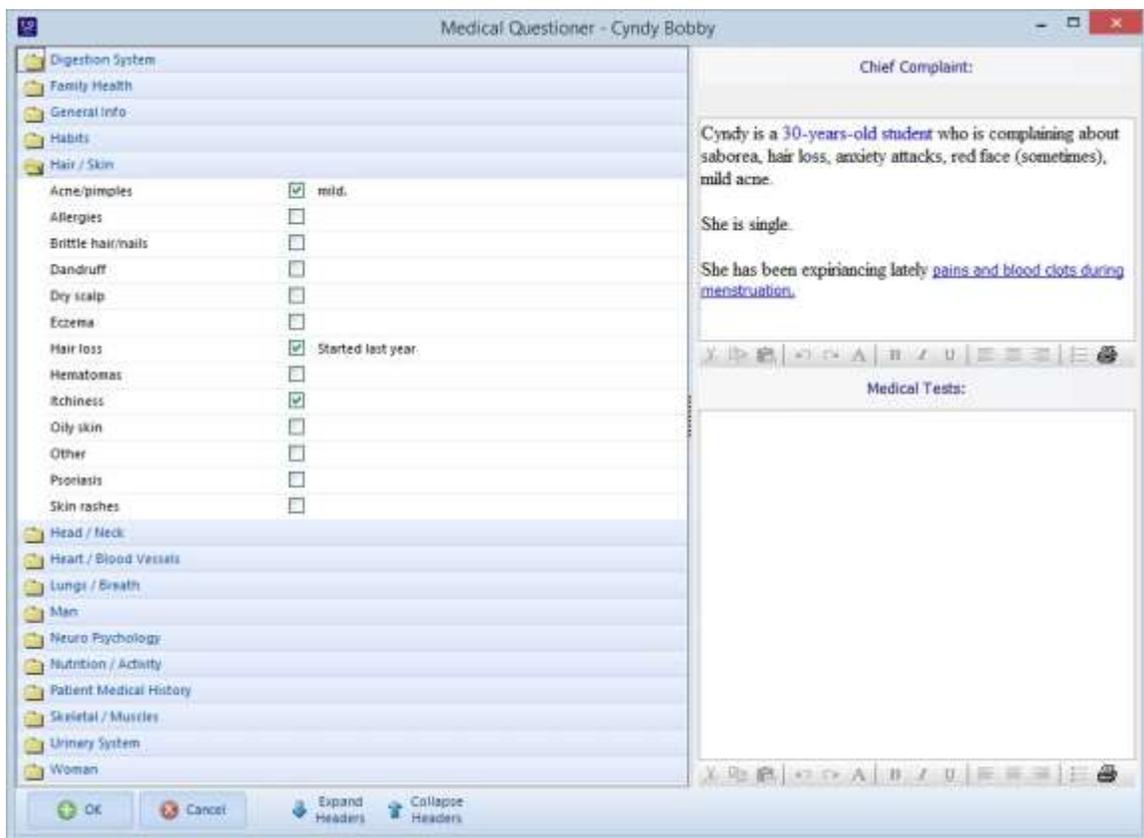
The questionnaire window is divided into topic headers list on the left side and two rich-text editors on the right. Each topic header can be expanded to list the related medical condition options available under that topic. If any of the listed medical conditions apply to the patient it can be clicked on the selection box. It is also possible to add free text next to the box if a description is necessary.

The top editor on the right is for inserting the chief complaint of the patient. The bottom editor is for any medical tests description for the patient.

SOAP: the SOAP notes is a basic record keeping method employed by doctors and other health care providers. It is an acronym for Subjective, Objective, Assessment, and Plan.

The SOAP notes can serve as a place for the overall assessment and treatment descriptions etc, while the Treatment Sessions editor in the Patients main window will serve as a description for each appointment.

Notes: when there is a need to save some extra text, not related to Treatment Sessions or SOAP notes, the notes window can be used. It is available from the Notes button at the top toolbar.
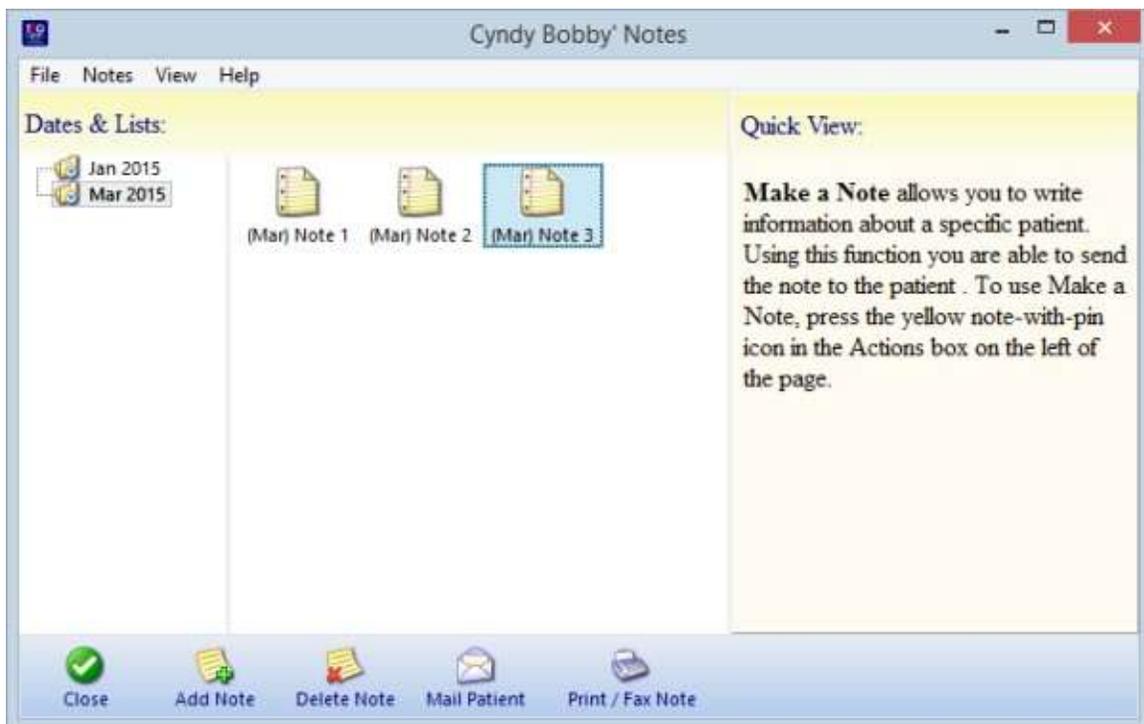
Notes can be added or deleted from the buttons in the bottom, or double-clicked for editing. The notes will be automatically arranged by months.

Stems & Branches Analysis: This system automatically performs the required calculations, and enables the practitioner to diagnose the patient's condition in context with his surroundings, and the cycle of heaven and earth. ("All laws of acupuncture must be based on the sun, moon, planets, stars and four seasons." [Qi Bo - Yellow Emperor]).

 Stems and Branches, helps the practitioner arrive at a map that clarifies a person's energetic nature according to the conditions of heaven at the time of his birth, his overall condition and weak points, and the organs requiring special attention to maintain health.

Clicking the S & B button on the top toolbar, or right-click over a selected patient and choosing Stems and Branches, will calculate and draw the stems and branches chart.

Note: in order to accurately calculate it, it is required that the correct birth date of the patient will be inserted in the patient file.

The Great Movement (G.M.) depicts the relationships among the Five Elements on the Planet Earth during any given year. This relationship is created by the movement of the Earth in conjunction with the movement of five planets around the Sun (Mercury, Mars, Venus, Jupiter and Saturn). Each one of these planets of the Solar System represents one of the Five Elements (Water, Fire, Metal, Wood and Earth).

The movement of the planets around the Sun is manifested each year as Great Movement (G.M.), which creates a dynamic imbalance on the Earth.

The Celestial Stem depicts the energetic connections among the 10 Organs of the body (the Pericardium and Triple Burner are not counted as organs) and the Five Elements.

The Four Possibilities depict the potential disharmonies (imbalances) of the Five Elements that may result from the combination of the energy of the Great Movement with those of the Celestial Stem and the Deep Energy.

This disharmony or imbalance is often at the root of human illness and will manifest clinically with clear signs and symptoms, both physical and emotional. These will be evident on diagnosis, by observation and from the pulse.

The possibilities change each year. Generally, a patient will have a permanent imbalance that manifests with varying degrees of intensity at different times, but there are also instances of different possibilities manifesting during different periods of a person's life. We may even see changes during the course of a treatment period, as the treatment progresses.

Deep Energy (D.E.) depicts the physiological functioning of the Organ, as manifested by the quality of the Qi flowing through the Organ Channel. This quality of Qi differs from the quality of the Celestial Stem of the Organ and is determined by the order of the flow of Qi in the Channels, in accordance with the movement of the biological clock.

Division Energy depicts the "internal climate" of the individual and indicates whether there is a tendency to excess of Heat, Dampness, Dryness, Cold or Wind, according to the Six-Channel Theory. Each year there is an excessive influence of one of the climatic energies on Earth, which causes the climate in the second half of the year to be diametrically opposed to that in the first half. Thus, an individual born during the first half of the year will have an "internal climate" different from an individual born during the second half of the year.

The Earthly Branch describes the karmic connection of an individual to one of the 12 animals of the Chinese zodiac. The animals define the various "behavioral molds" related to the spiritual development of an individual. Often, psychological or emotional problems result from conflicts created when an individual has to contend with his or her basic behavioral mold. Treatment of such problems will often reveal that the patient has qualities of the animal that is "opposite" to his or her Earthly Branch animal.

The function of Corrective Energy is to balance the excesses of climatic energies. If the clinical picture is one in which the Division Energy is too dominant and the "internal climate" is not in balance, a balancing influence may be attained by selecting an acupoint with Deep Energy as the Corrective Energy.

The Deficient Organs table shows the weak systems in the human energetic structure. These systems are often deficient in Qi, which will lead to the development of symptoms and illnesses during an individual's lifetime.

The deficient Elements (EL) are deduced from the birth chart. These are the Elements that are not represented by the Great Movement, the Celestial Stem, the Earthly Branch or the Division Energy.

The deficient Energies (EN) are also deduced from the birth chart. These are the Deep Energies that are not represented by the Celestial Stem, the Earthly Branch or the Division Energy. Combining the deficient Elements (EL) and the deficient Energies (EN) will give us an indication of the deficient Organs.

If an Element is not represented, neither on the elemental level or the Deep Energy level, this is indicative of a congenital deficiency of the Element itself. This usually manifests systemically and should be treated accordingly, including recommending life-style changes that will support creation of the Element that is lacking.

Progress Evaluation Graph: the Progress Evaluation Graph is used to monitor the improvement of a patient and to see the effectiveness of each session. You are also able to view the improvement through different types of graphs.

When the Progress button is clicked on the top toolbar the Evaluation Graph window is opened and the Health Condition Progress graph is displayed in the center of the page. There is a left column with tools to edit the graph or view it in different formats.

Enter Values: lets you rank each of your treatment sessions with your patient ranging from –100 to 100. This option opens up a box in between the icons and the graph. This box lists all the treatment sessions with the selected patient, ordered by dates in a descending order. The next

column has a space for values where you can enter in your subjective scores / ranks. Alternatively it is possible to select a session and the move the value bar at the bottom, left or right. When ranking each session, the Health Condition Progress graph changes accordingly.
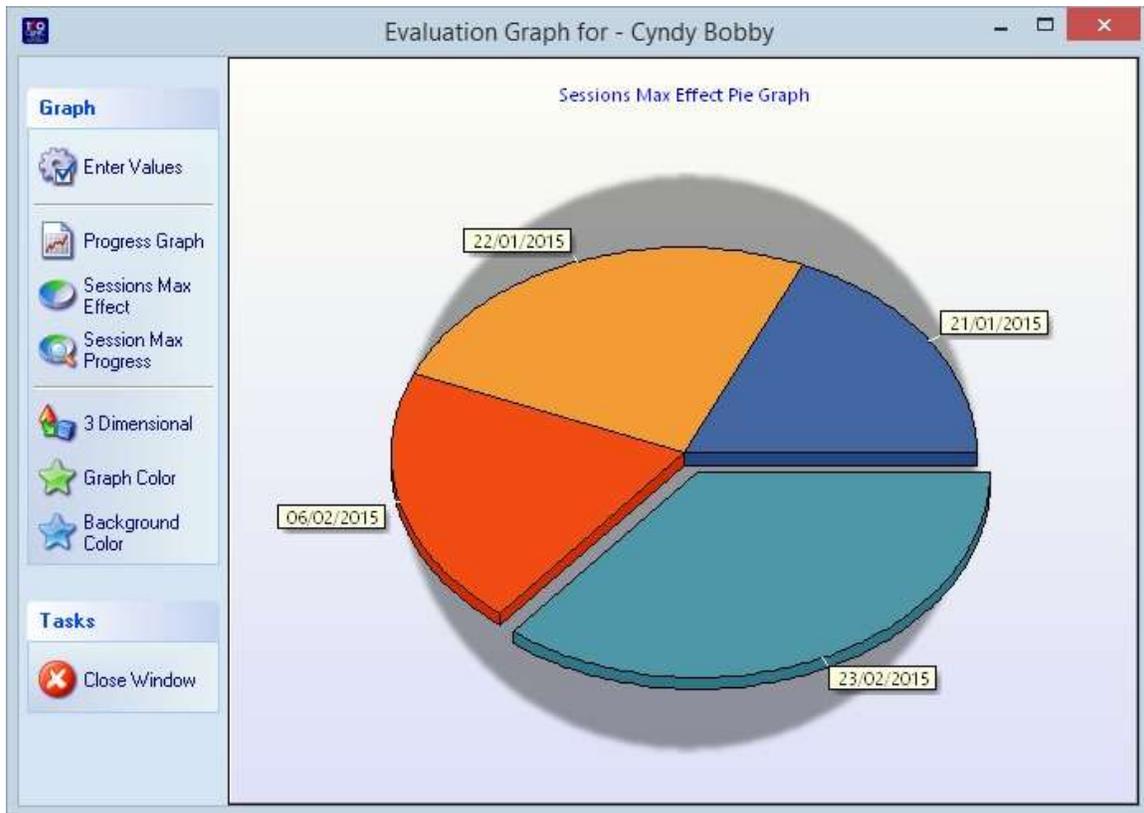

The Sessions Max Effect Graph is a pie graph, to visually perceive the effect of each treatment. The size of the slice indicates the treatment effect. The portion that is slightly removed from the pie represents the session with the highest effect.

3-Dimensional button lets you change a 3-dimentional pie to become flat and vice versa.

Graph Color button lets you choose the color of the lines in the Health Condition Progress graph.

Back Color button lets you change the background color in the Health Condition Progress graph and in the Sessions Effect Graph.

Manage Physicians: click the Manage Physician button on the top toolbar in the Physician & Patients window to get into the physician management window.
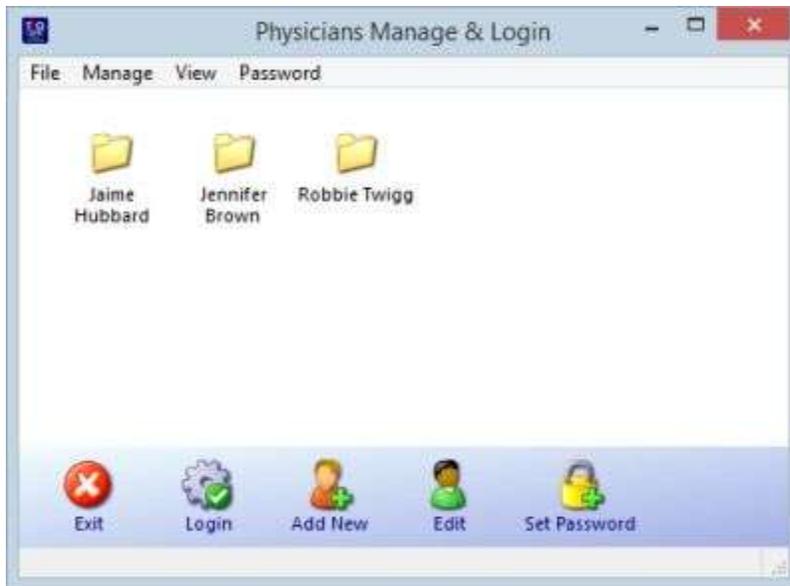
The Physician Manage & Login window is where you can add, edit and delete physician. This is also the login window that appears when the application is started. If only one physician is registered then PatientBooks knows to skip this window and save unnecessary steps on startup.

In case more than one physician is registered, this login window will appear and the physician account to login with is needed to be selected. The required physician account is chosen by double-clicking the folder icon with the requested name, or by selecting that folder and clicking the Login button at the bottom toolbar.

In case a password was created for the login physician it is necessary to key it in. The login and password information is highly protected and encrypted to allow a high security and full protection of the information in the application.

Note: once a password is set for a specific account, there will be no way to access the application without login with the correct password. It is advised to keep a copy of the password in a safe and hidden place in order not to lose the ability to login into the application.

Add New Physician is the function that is used to register a new physician account. The Add / Edit Physician page will appear allowing to enter information about the new physician.

Edit Physician is used to change or update information about a selected physician.

Use the Set Password button to set or unset a password for the selected physician account. When setting a new password please remember to save a copy of it in a safe hidden place. Keeping the information highly secured PatientBooks will not allow to login without a password once it is set. It is possible to remove the password from an account by using the Remove Password option from the Password menu; however, to remove a previously existing password it is first required to key in that password so that the security and safety of the information will not be breached or mishandled by an unauthorized entity.