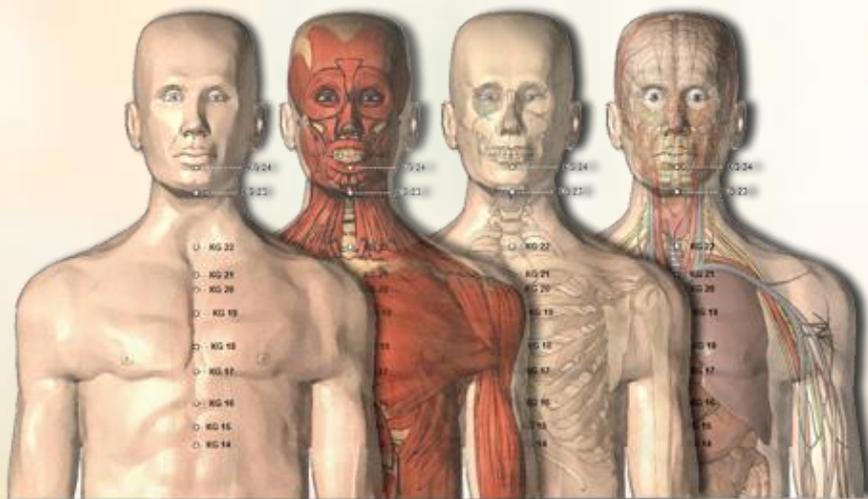


ShenProfessional 3.1- Quick Start Guide

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1 ShenProfessional – Quick Start Guide

ShenProfessional provides extensive and strong features. With the Quick Start Guide, we would like to enable you, to get fast access to the most important features.

If you have any more question or suggestion, don't hesitate to contact J.Bschaden@shenprofessional.com.

2 Options

The following settings should be edited or at least be known:

Shen documents

Shen documents (invoices and reminder) are documents, which are printed with the internal print option (not with MS Word). Enter your letter head (graphic file), your letter foot and sender at this category.

Currency

Enter your currency.

MS Word- and E-Mail-documents

Use this category to change the templates, which are necessary for the export to MS Word.

The templates for the e-mail message or the appointment's confirmation can be edited here.

Calendar

Choose the time units / h and the start time of the Calendar.

Practice data

Enter your practice data. They will be used automatically for the export to MS Word (for example with invoices).

There are two additional free fields at your disposal, which can be used to enter any text. The content of these free fields is exported to MS Word also.

Billing

Use the dropdown field *Payment method* to enter the defaults, which shall be used in Billing folder.

Options in ShenProfessional:

Edit your practice data, the defaults for the dropdown fields and much more at the options.

Patient data

Avoid unnecessary paper work: At category patient data, enter the defaults for the dropdown fields of register Address, Insurance and Misc of Patient folder.

Use Return on your keyboard to divide several entries.

3 TCM Theory

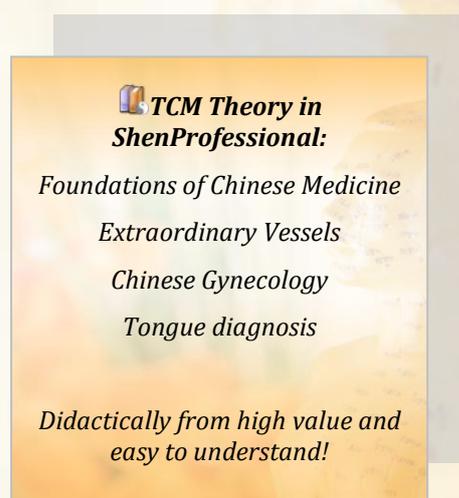
At the left side you find the table of contents and on the right side the content is displayed.

TCM beginner

As beginner Chinese medicine, it is recommended to study ShenProfessional's TCM Theory from top to bottom.

TCM advanced

Benefit from the search function and find specific content. The content is interlinked. This enables you to reach several topics – depending on your interest – from one document.



4 TCM Tutorial

TCM Tutorial contains comprehensive knowledge and functions. It consists of three registers: TCM, Acupuncture and Symptoms.

4.1 TCM (TCM Tutorial)

At TCM register of TCM Tutorial you find at the left side the TCM Catalogue with TCM diagnosis and TCM terms.

On the right side, you find the three docking folders TCM Information, Acupuncture Charts and Point Search.

To display the content of these docking folders, highlight a TCM diagnosis or TCM term in the TCM Catalogue. For this, just click with the mouse on a TCM diagnosis or TCM term.

4.1.1 TCM Information

At TCM Information docking folder, you find the symptoms of each TCM diagnosis, the causes, treatment tips, root and branch and a specific point combination for the treatment of the TCM diagnosis.

Additionally, own notes can be added to the TCM Information. Therefore use the Notes register.

With help of the TCM diagnosis context menu (right mouse button) you have always access to the TCM Information docking folder.

4.1.2 Acupuncture Charts

At TCM Register of the TCM Tutorial, the Acupuncture Charts display the treatment points of the associated TCM diagnosis.

The Acupuncture Charts associated with Yuan Source Point, display all Yuan Source Points (see: [4.2.2 Acupuncture Charts](#))

4.1.3 Point Search

After you have highlighted a TCM diagnosis or a TCM term, it is already displayed in the selection of the Point Search.

Click on Result register, the treatment points of this TCM diagnosis are displayed.

The Point Search of ShenProfessional offers possibilities, which are beyond the possibilities of a literature research.

Example:

Search for Luo-Connecting Points in combination with Kidney Yin Deficiency:

Step 1:

 Open the TCM Catalogue and select Luo-Connecting Point and Kidney Yin Deficiency.

Step 2:

 Click on this button to perform an AND-Point Search.

Step 3:

At Result register, all Luo-Connecting Points, which tonify the Kidney Yin are displayed.

Point Search

ShenProfessional's Point Search is comparable with a search engine.

With the search engine, several search terms are combined with AND (or with OR).

The combination with AND searches for points, which contain all search terms.

4.2 Acupuncture (TCM Tutorial)

The Acupuncture Catalogue is located at the left side of Acupuncture register of TCM Tutorial. At the right side, the docking folders Point Information and Acupuncture Charts are displayed.

Highlight an Acupuncture point to get access to the Point Information and Acupuncture Charts.

4.2.1 Point Information

At Point Information docking folder you have access to the name, location, function, indication, an explanation of the Chinese point name and to information about needling and moxibustion of each acupuncture point.

Additionally, own notes can be added to the Point Information. Therefore use the Notes register.

Use the full text search to search through the Point Information comfortably.

With help of the Acupuncture Point's context menu (right mouse button) you have always access to the Point Information docking folder.

4.2.2 Acupuncture Charts

Highlight an Acupuncture Point to display the Acupuncture Charts.

- ⇒ With help of the regulators on the left side of the Acupuncture Charts, determine the anatomical representation (skin, muscles, bones, inner organs with vessels and nerves) of the Acupuncture charts.

Acupuncture Charts displaying one single point

Use the acupuncture point's context menu (right mouse button) in the Acupuncture Catalogue to display only one point on the Acupuncture Chart.

4.3 Symptoms (TCM Tutorial)

The Symptoms Catalogue is located at the left side of Symptoms register of TCM Tutorial.

Highlight a symptom to get the TCM diagnosis.

- ⇒ Take some time to get familiar with the content of Symptoms Catalogue. The more familiar you get, the easier it is to find the necessary symptoms and diseases.
- ⇒ Click through the tree structure or enter a search item in the prefix search below, to quickly find the symptom. Use the F3 key of your keyboard to continue the search.

Symptoms Catalogue

ShenProfessional's Symptom Catalogue contains over 4000 symptoms and western diseases.

Get the TCM diagnosis to each symptom with a single click.

- ⇒ The Symptom Catalogue is very sophisticated. Often, a disease is differentiated by additional symptoms, which have to be enquired by your patient.

There are many orthopedic diseases, but you don't find knee pain. All pain conditions are located in category orthopedic/pain in the musculoskeletal system and they are differentiated by course of the channels..

This has the consequence that a knee pain has to be characterized by the affected channels. That's the only way to get a precise TCM diagnosis and an effective point combination.

4.3.1 TCM diagnoses

The TCM diagnoses of a symptom are displayed in TCM Diagnoses docking folder.

- ⇒ **Organs**
The colored organs indicate which organs are involved.
- ⇒ **Root and Branch**
The highest number below the root symbol indicates, which TCM diagnosis is the most often root.

The highest number below the branch symbol indicates, which TCM diagnosis is the most often branch.
- ⇒ **Use the context menu**
The TCM diagnoses context menu allows access to the TCM Information of each TCM diagnosis and much more.

5 Patients

The Patient folder is necessary for the administration of patient data and the documentation of diagnosis and treatment. You can also create mail merge documents and you are connected with the Billing folder.

The Patient folder consists of the three registers Patient, Diagnoses and Treatment.

No diagnosis and no treatment without appointment!

You need an appointment with the patient in order to work in the register "Diagnosis" or "Treatment" of the Patient folder.

5.1 Patients

The register „Patients“ in the Patient folder consists of the Patient’s file on the left side and the docking folder Patients data on the right side.

Mark a patient in the patient file on the right side, if you would like to view or edit his data.

5.1.1 Patients data

The docking folder “Patients data” consists of the fields „Address“, „Contact“, „Health Insurance“ and „Misc“. Every completed field of this docking folder is available with the MS Word export.

- ⇒  *Add new patients*
Use this button to add a new patient. The surname of the patient is mandatory.
- ⇒  *Delete patients*
Use this button to delete a patient. Any data will be deleted, including invoice data.
- ⇒ *Prescriptions or patient letters*
The prescription is set as default. In “Options” you can edit the MS Word template and choose “Patient Letter” for example.

You will need the data of your practice, the patient’s address, the patient’s date of birth and the field „Note“ of the register „Misc“ for the prescription. Please insert the content of the prescription in the field “Notes”. The text will be automatically transferred to the prescription template in MS Word.

5.2 Diagnosis

The register „Diagnosis“ in the Patient folder includes an overview of the diagnosis dates of the respective patient on the left side and the docking folders “Examination and Diagnosis”, “Billing data” and “Symptom Progress” on the right side.

You need an appointment with the patient in order to work in the register “Diagnosis” and in the respective docking files.

Follow these steps:

Step 1

Mark the respective patient in the register “Patients”.

Step 2

In order to complete an examination and a diagnosis, your patient will need an appointment.

- ⇒ Schedule the appointment in the Calendar. You can see the appointment immediately in the Patient folder.

No appointment scheduled?

When you start inserting the chief complain, ShenProfessional will ask you if the appointment shall be created automatically.

Confirm by clicking on “OK”.

- ⇒ Mark the patient's surname in the register "Diagnosis" and insert the chief complaint.

ShenProfessional will ask you if the appointment shall be created automatically. Confirm by clicking on "OK".

5.2.1 Examination and Diagnosis

The docking file „Examination and Diagnosis“ consists of the three registers "Examinations", "Symptoms" and "Diagnosis".

You will need this docking folder to document examinations, to save the symptoms of the respective patient and to receive the TCM diagnostic analysis of the chosen symptoms.

In order to use the docking folder "Examination and Diagnosis", you will need a patient who has already an appointment (please see: [5.2 Diagnosis](#)).

Step 1

Insert the chief complaint, the medical history, medications etc. in the provided fields.

Step 2

Change to the register "Symptoms" and open the Symptom Catalogue with this button . Select your patient's symptoms. The better you know the Symptoms Catalogue the easier it is to process the list.

If you consider a symptom as very important, you can mark it as "very important". Just click with the right mouse button on the symptom and choose „very important“.

A TCM diagnosis, which is the result of „very important symptoms“, will be later marked with a red exclamation mark.

Step 3

Change to the register „Diagnosis“. There you will receive the TCM diagnostic analysis of the symptoms you have chosen in step 2.

The TCM diagnostic analysis consists of the TCM Diagnoses and three series of numbers.

Meaning of the series of numbers in Diagnosis register:

- ⇒ first series of numbers = most common TCM diagnosis
- ⇒ second series of numbers = most common root
- ⇒ third series of numbers = most common branch

TCM diagnostics

*A precise TCM diagnostics is a work of art. Know how, intuition and experiences are necessary.
ShenProfessional supports you, but in the end, you have to decide, which treatment strategy will be the best for your patient.*

In the simplest case, you include the most common TCM diagnosis, the most common root and the most common branch in your therapy.

After marking symptoms as very important, a red exclamation mark will appear in front of the respective TCM diagnosis. We recommend taking also the most common TCM diagnosis into consideration.

Use the context menu (right mouse button) for TCM diagnosis and review the TCM Information.

5.2.2 Billing data

You will need the docking folder "Billing data" in the register "Diagnosis", in order to bill the appointment and the measures taken.

The docking folder "Invoices" consists of the registers "Billing codes" and "Products".

In order to use the docking folder "Billing data", you will need a patient who has already an appointment (please see [5.2 Diagnosis](#)).

To bill an appointment, please proceed as follows:

Step 1:

Mark the appointment, to which you would like to allocate a billing code or a product.

Step 2:

Choose from the drop-down fields "Billing Code" or "Description" the billing code you want to invoice.

- ⇒ Please use this button , if you want to invoice another billing code
- ⇒ Please use this button , if you want to delete a billing code
- ⇒ It is the same procedure in the register "Products".

Collective invoice

At Billing folder an invoice will be prepared from the allocated billing codes and products.

Step 3:

Every allocated billing code is immediately available in accounting. You can finalize the invoice without delay or summarize several appointments.

- ⇒ Mark the patient's surname in the Billing folder and click on „Collective Invoice“ (right mouse button or field below).
- ⇒ The invoice is completed and can be printed.

5.2.3 Symptom Progress

The docking file „Symptom Progress“ will show you, which symptoms were present or were not present at the saved diagnosis dates. This will give you a graphical overview of the success of the therapy.

5.3 Treatment

The register „Treatment“ in the Patient folder consists of the general view over treatment appointments of the respective patient on the left side and the docking files „Treatment“, „Billing data“ and „Point Search“ on the right side.

The description of how to use the Point Search can be found under 4.1.3 Point Search of the TCM register in the TCM Tutorial.

In order to work in the register „Treatment“ and to use the respective docking folders, you will need a patient who has already an appointment.

Please proceed as follows:

Step 1:

Mark the respective patient in the register „Patients“.

Step 2:

Your patient will need an appointment to apply a treatment.

Please schedule the appointment in the Calendar. You can see the appointment immediately in the Patient folder.

- ⇒ Mark the patient's name in the register „Treatment“ and insert the TCM diagnosis.
- ⇒ ShenProfessional will ask you if the appointment shall be created automatically. Confirm by clicking on „OK“.

5.3.1 Treatment

The docking folder „Treatment“ consists of the registers „Information“ and „Acupuncture“.

You need the docking file „Treatment“ to document information and acupuncture points of the therapy.

In order to use the docking folder „Treatment“, you will need a patient who has already an appointment (please see: 5.3 Treatment).

Step 1:

Insert the TCM diagnosis and the treatment principle in the respective fields. There are further fields for the evaluation of the treatment and for further comments.

Step 2:

Change to the register „Acupuncture“ and save the acupuncture points you are using in treatment for the respective patient.

You have different options to save acupuncture points:

- ⇒ Open the Acupuncture Catalogue by this button  and choose the points
- ⇒ Drag & drop the acupuncture points from any other sector of ShenProfessional into the docking folder “Treatment”
For example, from the Points combinations in the TCM Information or from the results of the Point Search or from the Acupuncture Catalogue in the TCM Tutorial.

How to Drag and drop?

-> use the left mouse button to click on an acupuncture point and hold the mouse button.

-> drag the point into the overview of treatment points.

-> release the left mouse button.

5.3.2 Billing data

You will need the docking folder “Billing data” in the register “Treatment”, in order to bill the appointment and the measures taken.

The docking folder “Billing data” consists of the registers “Billing codes” and “Products”.

In order to use the docking folder “Billing data”, you will need a patient who has already an appointment (please see [5.3 Treatment](#)).

To bill an appointment, please proceed as follows:

Step 1:

Mark the appointment, to which you would like to allocate a billing code or a product.

Step 2:

Choose from the drop-down fields “Code” or “Description” the billing code you want to invoice.

- ⇒ Please use this button , if you want to invoice another billing code
- ⇒ Please use this button , if you want to delete a billing code
- ⇒ It is the same procedure in the register “Products”.

Step 3:

Every allocated billing code is immediately available in billing folder. You can finalize the invoice without delay or summarize several appointments.

Mark the patient’s surname in the billing folder and click on „Collective Invoice“ (right mouse button or button below).

The invoice is completed and can be printed.

6 Calendar

You can manage your appointments comfortably in the Calendar. It consists of the register "Calendar" and the docking folder "Appointments" with the register "Day", "5 days week", "7 days week" and "Month".

How to use the Calendar:

Step 1:

Double-click on the appointment you want to schedule. The appointment assistant opens. Date, start time and end time of the appointment is already filled in. You can amend them, if necessary.

Step 2:

Please define the subject of the appointment. Choose between diagnosis appointment or/and treatment appointment and they will be immediately available in the Patient's folder.

Step 3:

Open the Patient folder by clicking on this button  and choose a patient. Click on "OK".

- ⇒ If you want to schedule an appointment for a new patient, please use this button  and insert at least the surname and telephone number of the patient. Click on "OK".
- ⇒ Close the appointment assistant by clicking on "OK". The appointment is scheduled.

How to schedule several appointments:

Mark an appointment, copy it with STRG+C and paste the appointment with STRG+V.

How to postpone an appointment:

Use drag and drop to postpone an appointment within the 7 days view.

Or use STRG+X to cut and STRG+V to paste the appointment at another date.

7 Billing folder

The Billing folder is necessary to prepare and edit invoices. It consists of the overview of the invoice data and the docking folder "Invoices".

In the overview of the invoice data you will find the following information – if they were filled in:

- ⇒  **Due billing**
= No invoices have been prepared for items of an invoice, which are due for billing

If you have allocated a billing code or a product to an appointment, an item of an invoice, which is due for billing was created. In the Billing folder, invoices are created from due billing items.

- ⇒  **Due Payment**
= unpaid invoices without date of payment

- ⇒  **Paid invoices**
= paid invoices with date of payment

What is an item of an invoice?

An item of an invoice is a billing code or a product, allocated to your patient.

Invoice items are necessary to create an invoice.

What is due billing?

Due billing means, that a billing code or a product is allocated to a patient, but the invoice is not yet prepared.

7.1 How to prepare a collective invoice:

All items of an invoice, which are due for billing, are summarized in a collective invoice.

Step 1:

Allocate one or more billing codes to one or more appointments in the docking folder „Billing data“ of the Patient folder. Please see also [5.2.2](#) or [5.3.2](#) for an exact description.

Step 2:

Open the Billing folder via the filter "Due Billing" or choose the respective patient via this button . The allocated billing codes are immediately visible.

Step 3:

Click with the right mouse button on the patient's name and choose the command „Collective Invoice“. The invoice is completed and can be printed .

7.2 How to prepare an “Independent Invoice”:

You do not need an appointment in the Patient folder for an independent invoice.

Step 1:

Open the Billing folder and choose a patient by clicking on this button .

Step 2:

Insert a new invoice by clicking on this button .

Step 3:

Change to the register “Items of an Invoice” and allocate the billing codes or products you want to invoice. The invoice is completed and can be printed .