

# SUCCESSFUL DIFFERENTIATION AND DIAGNOSIS in Chinese Medicine

*with Jeremy Ross*

*This discussion is not about how to take the pulse or analyse the tongue, it is about one thing, correctly differentiating and prioritizing Chinese syndromes.*

*If you do this correctly you get clinical success. If you don't do this right, the patient stays sick or gets worse.*

## 8 STAGES

1. understand Chinese organ system <i>functions</i>
2. learn Chinese organ system <i>syndromes</i>
3. learn to recognize <i>combinations</i> of syndromes
4. learn the possible syndromes for a particular <i>disease group</i>
5. differentiate between <i>similar syndromes</i> : learn to ask <i>differentiating questions</i>
6. learn how to take a <i>case history</i>
7. learn to <i>prioritize syndromes</i> , while taking a case history
8. learn to <i>persist</i> with questions, but ask the correct ones!

### 1. UNDERSTAND CHINESE ORGAN SYSTEM *Functions*

In order to understand the Syndromes of a Chinese organ system, you must understand the *Functions* of that organ.

Chinese organ system syndromes are just what happens when an organ system function goes wrong (pathology). So you must first thoroughly understand what does the function do in health (physiology).

## Example: Dispersing function of Lung

Lung Qi Stagnation is what happens when the Dispersing function of the Lung is obstructed. So you must first understand what the Dispersing function of the Lung really does.

Then you can *predict* what will be the signs and symptoms, tongue and pulse of the resulting syndrome.

**Dispersing function of the Lung** is associated with dispersal of Qi through the body, and with the 6 functional aspects in the Table below.

**Symptoms of Lung Qi Stagnation** if any of the 6 aspects of Lung Dispersing function are obstructed, then they will result in the corresponding symptom of Lung Stagnant Qi.

Functional aspect	Resulting symptom
<b>1. movements of breathing</b>	difficult breathing, asthma, sensation of blockage or fullness in the chest, pain or discomfort in the chest
<b>2. movement of air in the alveoli:</b> - to distribute oxygen to the blood vessels of the alveoli walls  - to prevent accumulation of toxins	reduced movement of air in the alveoli:  - lack of energy, can only do small amounts of exercise  - feeling generally ill, skin rashes
<b>3. movement of Defensive Qi</b> in the respiratory system and at the surface of the body	reduced immune resistance to disease, accumulation of Retained Pathogen, recurring respiratory infections
<b>4. regulation and movement of Fluids,</b> including sweating	a. excessive or insufficient sweating, certain forms of edema, <i>or</i> .  b. dryness in the respiratory passages
<b>5. movement of mucus</b> in the bronchioles to prevent accumulation	excessive phlegm in nose, throat, or bronchii
<b>6. normal flow of the Lung emotion</b> of 'letting go' (grieving)	obstruction of the necessary emotional process 'letting go', with resulting accumulation of grief, maybe with sighing and sensations of fullness in chest

*So if you have memorized and really understand the Function, you do not need to learn symptoms for the corresponding Syndrome, because you can already predict them!*

## 2. LEARN CHINESE ORGAN SYSTEM Syndromes

### Learn all the Chinese syndromes

In the beginning, you need to memorize the signs and symptoms, pulse and tongue for all the Chinese organ system syndromes- sorry, but that's medicine!

Later, when you really understand the organ system Functions, *in depth*, you don't need to *learn* them, because you can *predict* them.

### Example: Lung syndromes

For example, here is a list the main Lung syndromes:

<ul style="list-style-type: none"><li>● <b>Lung Deficient Qi</b><ul style="list-style-type: none"><li>+ Lung Deficient Yang</li><li>+ Deficient Defensive Qi</li><li>+ Retained Pathogen in Lung</li></ul></li></ul>
<ul style="list-style-type: none"><li>● <b>Lung Stagnant Qi</b></li></ul>
<ul style="list-style-type: none"><li>● <b>Invasion of Lung by Exterior Wind</b> (Wind Heat, Wind Dryness, Wind Cold, Wind Damp)</li></ul>
<ul style="list-style-type: none"><li>● <b>Lung Phlegm</b> (Phlegm Heat, Phlegm Cold, or Phlegm Damp)</li></ul>
<ul style="list-style-type: none"><li>● <b>Lung Deficient Yin</b> (with Lung Dryness)</li></ul>

### What you need to learn for each syndrome

You need to learn the signs and symptoms, pulse and tongue for each Chinese syndrome. For example, for *Lung Qi Stagnation*:

**Signs and symptoms**      see *Symptoms of Lung Stagnant Qi* above.

**Pulse**                      maybe wiry, or with sensation of restriction, in Lung position,  
maybe deep due to emotional restraint keeping Qi inside,  
maybe slippery in Lung position due to accumulation of phlegm

**Tongue**                    maybe purplish due to Stagnant Qi  
maybe greasy due to phlegm accumulation

### 3. LEARN TO RECOGNIZE **Combinations OF SYNDROMES**

*Chinese syndromes rarely occur singly.*

#### Examples

##### **Within one organ system**

If you understand the relationship between the different functions of *one* particular organ system, *then you can predict which syndromes of that organ are likely to occur together.*

For example, if Lung Qi is Deficient, then often *Defensive Qi* will be Deficient also.

This means that invasion of the *Lung by Exterior Wind* becomes more likely.

It also means that *Retained Pathogen* is likely, especially if there is repeated antibiotic use for the frequent respiratory infections.

So if you think that the patient has Lung Deficient Qi, you should question the patient to check if the other syndromes are there too.

##### **Between two organ systems**

Similarly, if you understand the functional relationships between *two different* organ systems, *then you can predict which syndromes of the two organs are likely to occur together.*

For example, if the Lung is Deficient, the *Spleen*, the mother of the Lung according to Five Elements, may also be Deficient. It is the Spleen that must supply nourishment to the Lung.

So if you think that the patient has Lung Deficient Qi, you should question the patient to check if this is related to Spleen Deficiency.

## 4. LEARN ALL POSSIBLE SYNDROMES FOR A *Disease group*

### Example: headache

We can take the example of *headache* and look at the Chinese syndromes for 10 common types of headache.

#### Liver Hyperactive Yang (LHY) + Additional syndrome

In each of these 10 types of headache, there is Liver Hyperactive Yang combined with one or more additional syndrome.

So in the Table below, in order to differentiate between the headache types, we emphasize the signs and symptoms of the *additional* syndrome.

Remember that the patient will also have one or more signs of LHY, such as irritability. These are listed below.

#### Signs and symptoms of LHY

- distending headache, maybe at temples, vertex, or around the eyes
- dizziness, tinnitus, irritability and anger, hypersensitivity to bright lights or loud noise, maybe raised blood pressure
- wiry pulse, especially in Liver position
- tongue may tremble

There may be underlying Deficiency, with tiredness, and more or less forceless pulse.

## Table of Chinese syndromes for 10 headache types

<b>EXTERIOR WIND</b>		
<b>LHY + Wind Cold</b> <span style="float: right;"><b>headache + myalgia</b></span>		
<i>Signs and symptoms</i>	acute or recurring headache with ache and stiffness in the muscles of the neck and shoulders  can be associated with: exposure to wind and cold, influenza or common cold, or increased nervous tension	
<i>Pulse</i>	wiry, maybe empty in superficial level	<i>Tongue</i> maybe pale
<b>PHLEGM</b>		
<b>LHY + Lung Phlegm Cold</b> <span style="float: right;"><b>headache + sinusitis</b></span>		
<i>Signs and symptoms</i>	sinus congestion with frontal headache, white nasal discharge, sensation of heaviness in head, mental dullness, sensation of cold	
<i>Pulse</i>	wiry, slippery in LU position	
<i>Tongue</i>	maybe pale, greasy white coat	
<b>LHY + Lung Phlegm Heat</b> <span style="float: right;"><b>headache + sinusitis</b></span>		
<i>Signs and symptoms</i>	sinus congestion with frontal headache, yellow or green nasal discharge, sensation of heaviness in head, maybe mental dullness, sensation of heat	
<i>Pulse</i>	wiry, slippery in LU position	
<i>Tongue</i>	red, maybe dry, greasy yellow coat	
<b>HEAT</b>		
<b>LHY + Liver Heat</b> <span style="float: right;"><b>headache + hypertension</b></span>		
<i>Signs and symptoms</i>	severe headache with distending or bursting sensation, anger and shouting, maybe body shaking, maybe hypertension  whole face red, whole body hot, thirst, bitter taste	
<i>Pulse</i>	wiry, full or flooding, rapid	<i>Tongue</i> scarlet, dry
<b>DISTURBANCE</b>		
<b>LHY + Heart Spirit Disturbance</b> <span style="float: right;"><b>headache + anxiety</b></span>		
<i>Signs and symptoms</i>	headache with distending sensation, at vertex or temples, worse with nervous tension, anxiety, or fearfulness, maybe insomnia, and palpitations	
<i>Pulse</i>	wiry especially in LR position, irregular, rapid	
<i>Tongue</i>	red, or red (spots on) tip/ edges, maybe trembling	

**STAGNATION****LHY + Stagnant Blood in channels**      *headache + trauma*

*Signs and symptoms*      localized headache following trauma, maybe with severe or stabbing pain, near site of injury, maybe delayed shock

*Pulse*      wiry, maybe choppy      *Tongue*      maybe purplish or with purple area

**LHY + Liver Stagnant Qi**      *headache + premenstrual syndrome + depression*

*Signs and symptoms*      headache with distending sensation, at vertex or temples, worse with emotional constraint, frustration, or depression

maybe digestive disorders with belching, nausea, or abdominal distension

maybe premenstrual syndrome, menstrual irregularity, or pain

*Pulse*      wiry, especially in LR (and SP) positions      *Tongue*      maybe purplish

**DEFICIENCY****LHY + Deficient Blood**      *headache + anemia*

*Signs and symptoms*      headache with dull ache and sensation of emptiness in the head

anemia, exhaustion, maybe dizziness, floaters in visual field, maybe sensations of cold

delayed menstruation, or headache after menstruation

*Pulse*      more or less wiry, choppy, thin      *Tongue*      thin, pale, maybe dry

**LHY + Spleen Deficient Qi**      *headache + hypoglycemia*

*Signs and symptoms*      headache with faintness, lack of concentration and irritability, especially by not eating sufficiently frequently, tendency to hypoglycemia

*Pulse*      more or less wiry, especially at LR position, more or less empty, especially at SP position

*Tongue*      pale, toothmarks, maybe trembling

**LHY + Kidney Deficient Qi**      *headache + tinnitus*

*Signs and symptoms*      dull headache with drained feeling, especially after sex or physical labor, exhaustion, dizziness, weak lower back, urinary frequency

*Pulse*      more or less wiry, especially at LR position, but more or less empty, especially at KI position

*Tongue*      pale, flabby, toothmarks, maybe swollen

## 5. DIFFERENTIATE BETWEEN SIMILAR SYNDROMES: LEARN TO ASK DIFFERENTIATING QUESTIONS

You need to learn the difference between similar Chinese syndromes, so that in a Consultation with a patient *you know what questions to ask to differentiate between these similar syndromes.*

### Example

You are not sure whether the patient has Lung Deficient Qi or Lung Stagnant Qi. What is the difference? Do you know?

It is important, *because your Principle of Treatment will be different:* to tonify Deficiency or to move Stagnation.

### Essential difference

The essential difference is that:

- the signs of Lung *Deficiency* are signs of *weakness*
- the signs of Lung *Stagnation* are signs of *blockage* and maybe accumulation.

	Lung Deficiency	Lung Stagnation
<b>SYMPTOMS</b>		
<i>voice</i>	weak	maybe phlegmy
<i>cough</i>	weak, maybe no pain	maybe difficult expectoration, maybe pain
<i>sensation in chest</i>	emptiness	obstruction or fullness
<i>breathing</i>	weak or shallow, shortness of breath	dyspnoea with discomfort or pain, asthma
<i>energy</i>	low energy, worse with exercise	energy better with exercise
<i>skin</i>	maybe dry	maybe rashes or boils
<i>immune resistance</i>	low resistance, frequent infections	frequent infections, but energy not so low
<i>perspiration</i>	excessive even with little exercise	maybe normal
<i>emotions</i>	withdrawal, living in the past	blocked grief, sensation of fullness in chest
<b>PULSE</b>	empty in LU position	wiry or 'restricted' in LU position
<b>TONGUE</b>	pale, thin or with hollow in LU area	maybe purplish

## Differentiating question

So a good example of a differentiating question is to ask the patient:

*“If you do a moderate amount of physical exercise, how do you feel, more energetic or less?”*

If the patient says:

*“Oh, I feel so tired and weak after even a little exercise, and I get so breathless, and I sweat so much.”*

Then it is Lung *Deficient* Qi, and your Principle of Treatment is to *tonify*, and not to *move*.

## 6. LEARN HOW TO TAKE A CASE HISTORY

### All your questions are to differentiate between Chinese syndromes

*It is rather useless to ask a lot of questions without a clear idea of where you are going with them, and then try to analyse the mess afterwards.*

When a patient opens the door of your consulting room, by the time they have walked to the chair and sat down, you should already have some idea of where to start with your questions.

For example, which of the 4 main Qi Imbalances is their primary problem?

- Deficiency
- Excess
- Stagnation
- Disturbance

Then which organ system syndromes do they have?

*All the questions that you ask, should be designed to differentiate between specific Chinese syndromes.*

### What are the Chinese syndromes of the main complaint?

If the patient says that their main problem is headache, then your questions, *from the beginning of the consultation*, are designed to differentiate between the 10 possible headache syndromes in the Table above, and also to see if there are any other related syndromes.

## Do-not-act-like-a-machine!

Please do not act like a machine and ask-them-about-their-bowels, and just write down whatever they say.

If you already have an idea that it is either a Liver Qi Stagnation headache or a Liver Excess Heat headache, your bowel question is very specific:

“Which of these two do you have?”

- abdominal distension with constipation, loose stools, or an alternation between the two *(LR Stagnant Qi)*
- constipation with dryness and perhaps hemorrhoids that bleed when you strain? *(LR Excess Heat)”*

## Please see the special Case history documents

- Case history record
- Case history explanation

## 7. LEARN HOW TO PRIORITIZE SYNDROMES

### Primary and Secondary syndromes

A Chinese syndrome of *primary* importance is one with *more signs and symptoms*, or *more severe* signs and symptoms, than a secondary syndrome.

It is vitally important to prioritize the Chinese syndromes, because the greater the importance of a syndrome, *the more herbs or acupuncture points* will be included to treat it in the herb combination or acupuncture point combination.

### Prioritize right from the start of the consultation

Prioritization should not be done at the end when the patient has left, because then it is too late. *It should be done while you are questioning the patient.*

You must design questions specifically to determine the relative importance of the syndromes, and ask them *while the patient is still there* to answer you..

### Example 1: Spleen and Kidney

#### Diagnosis

In the case of a patient with digestive disorders, tiredness, and depression, the practitioner correctly identifies the patient's syndromes as Kidney Deficient Qi and Spleen Stagnant Qi.

But, the practitioner then makes a mistake, and decides that Kidney Deficient Qi is primary and Spleen Stagnant Qi is secondary.

### **Prescription**

#### *Mistake!*

The practitioner prescribes a herb combination with:

- **five** sweet tonics for the **Kidney** Deficiency
- **two** aromatic herbs for the **Spleen** Stagnation.

The result is that the patient feels more tired, more heavy and lethargic, more depressed, and loses appetite, has abdominal distension, discomfort and flatulence.

#### *Correct*

In reality, for this patient, Spleen Stagnation is primary, and Kidney Deficiency is secondary, so the herb combination should have contained:

- **four to five** aromatic, acrid, or bitter herbs for **Spleen** Stagnation
- **two to three** sweet herbs for the **Kidney** Deficiency.

### **How the mistakes were made**

*In the example above, the practitioner was not sufficiently thorough in collecting the data.*

### **Relative importance of Spleen and Kidney**

In fact, the patient had six indications of Spleen Stagnation and only three indications of Kidney Qi Deficiency.

#### *Spleen*

The Spleen Stagnation indications were:

1. loss of appetite
2. epigastric discomfort
3. abdominal distension
4. tiredness with a sense of heaviness
5. tiredness after meals
6. depression with obsessive thinking and mental stagnation

#### *Kidney*

The Kidney Deficiency indications were:

1. lack of motivation and ambition
2. lack of sex drive
3. chronic lower back weakness

## 8. Persist WITH YOUR QUESTIONS, but ask the Right ones!

In Example 1 above, the practitioner recorded Spleen indications Numbers 4. – 5. as Kidney indications, and so made the mistake with prioritization.

- practitioner was not careful enough with the questions
- practitioner did not ask enough questions and they did not ask the right questions
- practitioner did not *PERSIST* with their questions, until they had differentiated between the two possible syndromes as clearly as possible.

### Example 1: Spleen and Kidney (see above)

#### Tiredness

##### First question

The practitioner asked 'do you feel tired in the afternoon?' and the patient said 'yes'. So the practitioner recorded this as Kidney Deficiency.

##### Second question

The practitioner should have asked a **second question** 'is the tiredness in the afternoon just after lunch, or is it around 3-4 pm?'

The patient then would have said 'it's only after lunch, I am not tired at 3-4 pm'.

##### Third question

The practitioner should then have asked a **third question** 'is your tiredness with a sensation of emptiness or with a sensation of heaviness and fullness?'

The patient would have said 'with both, but especially with heaviness'. This indicates that the tiredness is due to Stagnation and not only Deficiency.

So the practitioner scored 1 for Kidney when they should have scored 2 for Spleen.

#### Depression

##### First question

The practitioner asked 'are you depressed and tired', the patient said 'yes' and the practitioner recorded this as Kidney Deficiency.

##### Second question

The practitioner did not persist with their questions; they should have asked a **second question** 'when you feel depressed, do you have worry or obsessive thinking, or do you feel fear?'

Then the patient's partner, who was in the room, would have said 'he is always worrying and obsessing unnecessarily'.

##### Third question

The practitioner should have a third question 'when you feel depressed do you feel empty inside or sort of stuck and bogged down, either in your mind or in your life?' and the patient would have said 'stuck'.

So the practitioner scored the depression as Kidney Deficiency, when it should have been scored as Spleen Stagnation.

## Example 2: differentiate between combinations of syndromes of one organ

### Diagnosis

The patient said 'I am depressed'.

The practitioner correctly, in this case, recorded this as **Liver Stagnant Qi**, because the patient reported feelings of fullness and obstruction in the hypogastrium and difficulty digesting fatty foods.

### Mistake!

But the practitioner did not go far enough, and should have made further observations or asked further questions:

*to distinguish between the different possible combinations of Liver syndromes that can be associated with depression*

3 are shown in the table below, but there are others- what are they?:

Liver syndromes	Patient indications
LR Stagnant Qi + LR Hyperactive Yang	depression + irritability and impatience
LR Stagnant Qi + LR-GB Deficient Qi	depression + self-doubt and indecision
LR Stagnant Qi + LR Deficient Blood	depression + emotional fragility and exhaustion
LR Stagnant Qi + ?	depression + ?
LR Stagnant Qi + ?	depression + ?

What further questions should the practitioner have asked, to distinguish between:

- LR Hyperactive Yang ?
- LR Deficient Qi ?
- LR Deficient Blood ?

### Example 3: differentiate between syndromes of *more than one organ*

#### Practitioner half-asleep

Another patient came to the same practitioner and said 'I'm depressed', and the practitioner, without too much thought, decided on depression due to Liver Stagnant Qi.

*BUT depression can be associated with a large number of Chinese syndromes!*

#### Chinese syndromes associated with depression

Depression can be due to Deficiency or Stagnation of any of the Chinese organ systems, and can be associated with other factors also. For example:

<ul style="list-style-type: none"><li>• Heart Deficient Qi and/or Yang</li><li>• Spleen Deficient Qi and/or Yang</li><li>• Lung Deficient Qi and/or Yang</li><li>• Kidney Deficient Qi and/or Yang</li><li>• Liver Deficient Qi and/or Yang</li></ul>
<ul style="list-style-type: none"><li>• Heart Stagnant Qi</li><li>• Spleen Stagnant Qi</li><li>• Lung Stagnant Qi</li><li>• Kidney Stagnant Qi</li><li>• Liver Stagnant Qi</li></ul>
<ul style="list-style-type: none"><li>• Sinking of Qi</li></ul>
<ul style="list-style-type: none"><li>• Deficient Blood</li></ul>
<ul style="list-style-type: none"><li>• Damp and Phlegm</li></ul>
<ul style="list-style-type: none"><li>• Cold</li></ul>
<ul style="list-style-type: none"><li>• Heat</li></ul>

### Example 3: Depression due to Heart or Lung Stagnation?

The patient says 'I am depressed with a feeling of obstruction and fullness in the chest', but the patient has no pain in the chest and no phlegm.

*The practitioner must ask questions to differentiate between Heart Stagnant Qi and Lung Stagnant Qi.*

#### *First question*

The practitioner can ask 'have you had a relatively recent grief or loss?' If the patient says 'no' then the possibility of Lung Stagnation is less likely. But check the Lung pulse, because they may say 'no' because they don't want to talk about it.

#### *Second question*

The practitioner can ask a second question 'are you having difficulty in expressing or communicating your feelings in a close personal relationship?'

The patient says 'yes, I am fond of my girlfriend but I get embarrassed, and just don't know how to show my emotions, and they just seem to accumulate inside me, and I feel uncomfortable and I get depressed. And I find it really difficult to talk about it.'

So the diagnosis is [Heart Qi Stagnation](#).

### Example 4: Depression due to Kidney or Heart Deficiency?

For example, the patient says 'I'm depressed and I am tired and I lack interest in life'. But is this lack of interest due to Heart or Kidney Deficiency?

#### *First question*

The practitioner asks 'is it that you lack enthusiasm and *joie de vivre*, or is it that you lack motivation and drive, so that you can't focus on goals and finish tasks?'

The patient says 'I just seem to have no will power, I know that I should get on with my work, but I just can't seem to get started, and that makes me depressed'.

#### *Second question*

The practitioner records Kidney Deficient Qi, but asks a further question 'yes, but do you *also* feel lonely and want people to come and entertain you and make you laugh?' The patient says 'yes I feel sad and sort of empty inside my chest- I would like a bit of affection.'

The practitioner records Deficiency of both Heart and Kidney Qi, and includes herbs for each in the prescription.