

NEXTGEN PAST MEDICAL, SOCIAL, & FAMILY HISTORY DEMONSTRATION

This demonstration reviews documentation of most everything you can enter on the **Histories Tab** in NextGen.

This has been prepared for EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

The **Histories** tab is where most all past medical, social, & family history is entered. There are several sections on this tab, which you can navigate through in several ways using the collapsible panels.

The screenshot shows a web application interface for medical history. At the top, there's a browser tab labeled "02/26/2014 04:45 PM : 'USA Histories'". Below that, the interface includes a header with "Specialty" set to "Family Practice" and "Visit Type" set to "Office Visit". A navigation bar contains tabs for "Intake", "Histories" (which is highlighted), "SOAP", "Finalize", and "Checkout". Below the navigation bar, there are several sections: "Demographics", "Order Management", "Document Library", and "Chart Abstraction". A "Care Guidelines" section is visible, with "Global Days" and "History Review" (which is highlighted) as sub-sections. A note under "History Review" states: "All History Review details are to be reviewed and included in visit note unless user indicates otherwise". To the right of this section is a "Panel Control" area with buttons for "Toggle", "Cycle", and a refresh icon. Below this is a "Problem List" section with a "0" indicator. It includes checkboxes for "Show chronic", "Show my tracked problem", "No active problems", and "Reviewed". The main area of the "Problem List" is a table with columns for "Problem Description", "Side", "Notes", and "Addtl". The table is currently empty.

We'll start with the **Problem List**. To add a problem, click **Add**.

Refresh

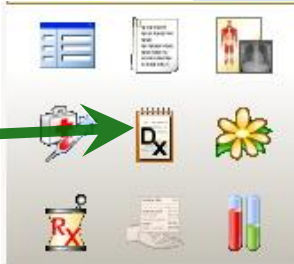
Add

Edit

The screenshot shows the 'Problems' module interface. At the top, there are two tabs: 'Problem List' (highlighted with a green box) and 'Billing ICD List'. Below the tabs is a toolbar with 'Refresh' (circular arrow icon), 'Preferences' (gear icon), 'Show All Statuses' (dropdown menu), and two checkboxes: 'Show My Tracked Problems Only' and 'Show Chronic Problems Only'. A status bar below the toolbar reads 'No Active Problems'. The main area is a table with columns: 'Concept Id', 'Description', 'Fully Specified Name', and 'Chronic'. At the bottom, there is a secondary toolbar with buttons: 'Add Problem' (plus icon), 'Re-Code', 'Resolve' (circular arrow icon), 'Set Chronic', 'Delete' (X icon), 'Resources' (globe icon), 'View/Add Notes', 'View History', and 'Reconcile'. Below this is another row of buttons: 'Add to Billing ICD List', 'Add to My Tracked Problems', and 'Remove from My Tracked Problems'.

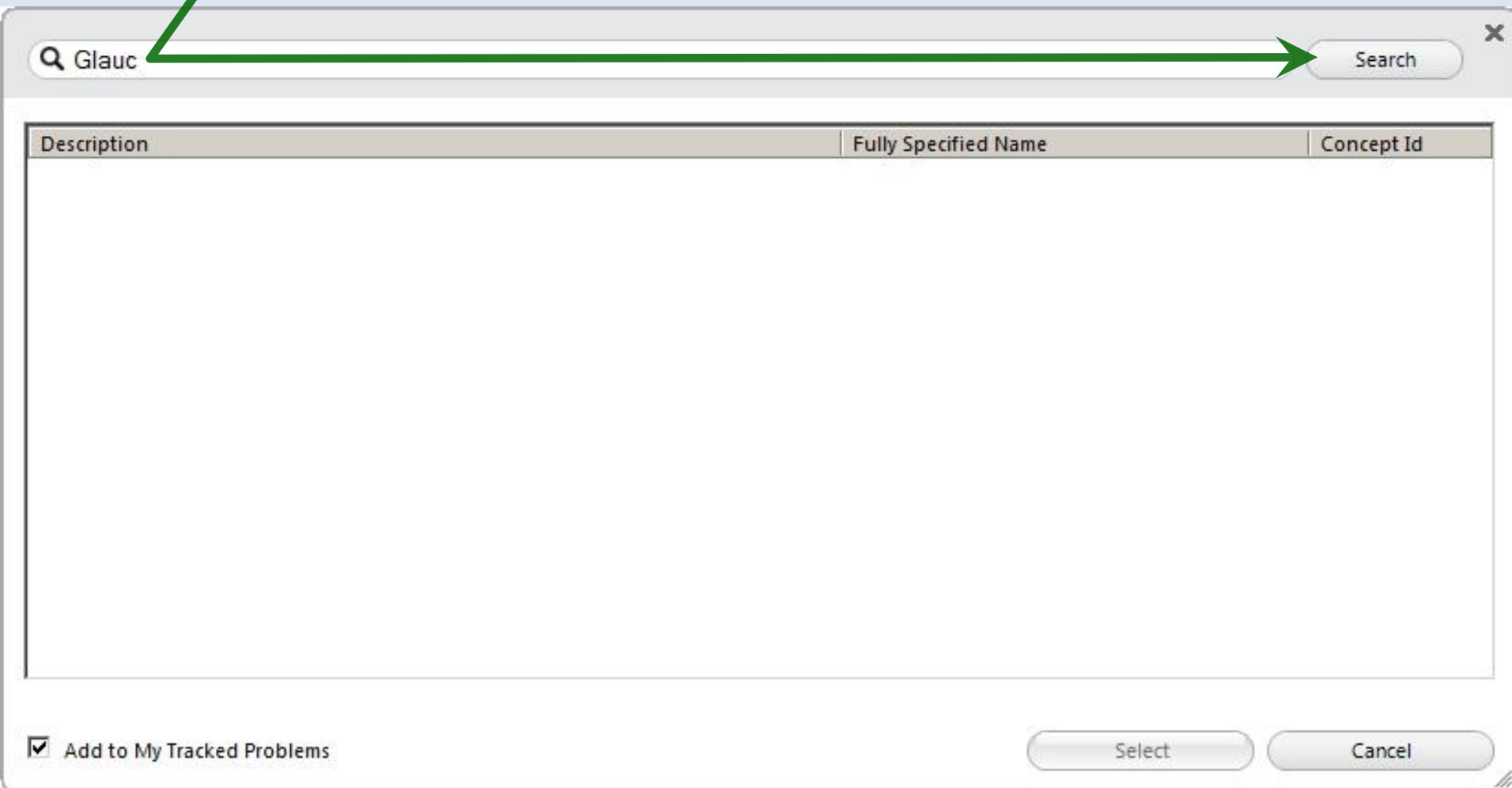
The Problems Module opens, focused on the Problem List Tab.

This is sometimes called the **Diagnosis Module** because of the **Dx Icon** that will open it from the tic-tac-toe board.



To add a new problem, logically enough, click **Add Problem**.

The diagnosis search popup appears. Let's find glaucoma. Click in the search field, type glauc, then click Search.



Q Glauc Search

Description	Fully Specified Name	Concept Id
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Add to My Tracked Problems

Select Cancel

A list of results appears. Notice you didn't even have to type a complete word—though the more you type, the shorter your results list will be, & the quicker it will appear. We'll select **Open-angle glaucoma** by double-clicking on it.

Q Glauc

Search

Description	Fully Specified Name	Concept Id
Interval angle-closure glaucoma	Intermittent angle-closure glaucoma	65460003
Lens particle glaucoma	Lens particle glaucoma	404648005
Lens swelling glaucoma	Phacomorphic glaucoma	392300000
Lens-particle glaucoma	Lens particle glaucoma	404648005
Nicotiana glauca poisoning	Nicotiana glauca poisoning	83086008
Normal pressure glaucoma	Low tension glaucoma	50485007
Open cleft glaucoma	Open-angle glaucoma	84494001
Open-angle glaucoma	Open-angle glaucoma	84494001
Phacogenic glaucoma	Phacogenic glaucoma	84333006
Phacomorphic glaucoma	Phacomorphic glaucoma	392300000
POAG - Primary open-angle glaucoma	Primary open angle glaucoma	77075001
Postoperative angle-closure glaucoma	Postoperative angle-closure glaucoma	89215000
Primary angle closure glaucoma	Primary angle-closure glaucoma	392288006

96 rows returned

Add to My Tracked Problems

Select

Cancel

Problems

Problem List | Billing ICD List

Refresh Preferences Show All Statuses Show My Tracked Problems Only Show Chronic Problems Only

Concept Id	Description	Fully Specified Name	Chronic	Secondary Con
Active				
Open-angle glaucoma				
84494001	Open cleft glaucoma	Open-angle glaucoma	<input type="checkbox"/>	<input type="checkbox"/>

The diagnosis appears on the **Active** problem list.

There are a lot of details that can be added below, some of which you may use, & some of which you may ignore.

Add Problem Re-Code Resolve Set Chronic Delete Resources View/Add Notes View History Reconcile

Add to Billing ICD List Add to My Tracked Problems Remove from My Tracked Problems

Accept Cancel

Concept Id: 84494001

Description: Open cleft glaucoma Fully Specified Name: Open-angle glaucoma

Onset Date: 03/01/2014 Resolved Date: 03/01/2014 Last Addressed:

Resolved By: Resolved Reason:

Problem Status: Active Clinical Status:

Chronic: Recorded Elsewhere: Source: EHR

Secondary Condition:

Provider: ROBERT LAMAR DUFFY, Location: USA FAMILY MEDICINE

Side: Site:

Concept Id	Description	Fully Specified Name	Chronic	Secondary Con
Active				
Open-angle glaucoma				
84494001	Open cleft glaucoma	Open-angle glaucoma	<input type="checkbox"/>	<input type="checkbox"/>

First look at **Onset Date**. Today's date is entered by default, but unless this is truly the first day this diagnosis is being made (usually *not* the case), you'll want to change this. If you know a date of onset, you can click the dropdown arrow to add one; you may need to approximate. But if you don't know the onset date or it is immaterial, just click the checkbox to clear it.

Concept Id:

Description:
 Fully Specified Name:

Onset Date: 03/01/2014
 Resolved Date: 03/01/2014
 Last Addressed:

Resolved By:
 Resolved Reason:

Problem Status:
 Clinical Status:

Chronic:
 Recorded Elsewhere:
 Source:

Secondary Condition:

Provider:
 Location:

Side:
 Site:

The very nature of a "Problem List" would seem to imply "chronic," but NextGen provides the option of distinguishing "chronic" from "not chronic"—though I'm not sure I'd go to the trouble to add something here that is not chronic.

Anyway, to indicate the diagnosis is chronic, click **Set Chronic** or the **Chronic** checkbox.

The screenshot shows the 'Problems' form in NextGen. At the top, there are tabs for 'Problem List' and 'Billing ICD List'. Below the tabs is a toolbar with buttons for 'Refresh', 'Preferences', 'Show All Statuses', 'Show My Tracked Problems Only', and 'Show Chronic Problems Only'. The main form area contains the following fields:

- Concept Id: 84494001
- Description: Open cleft glaucoma
- Fully Specified Name: Open-angle glaucoma
- Onset Date: 03/01/2014
- Resolved Date: 03/01/2014
- Last Addressed: (empty)
- Resolved By: (empty)
- Resolved Reason: (empty)
- Problem Status: Active
- Clinical Status: (empty)
- Chronic: (indicated by a green arrow from the text above)
- Recorded Elsewhere:
- Source: EHR
- Secondary Condition:
- Provider: ROBERT LAMAR DUFFY
- Location: USA FAMILY MEDICINE
- Side: (empty)
- Site: (empty)

At the top of the form, there are buttons for 'Add Problem', 'Re-Code', 'Resolve', 'Set Chronic', 'Delete', 'Resources', 'View/Add Notes', 'View History', and 'Reconcile'. Below these are buttons for 'Add to Billing ICD List', 'Add to My Tracked Problems', and 'Remove from My Tracked Problems'. At the bottom left, there are 'Accept' and 'Cancel' buttons.

Problems

Problem List | Billing ICD List

Refresh | Preferences | Show All Statuses | Show My Tracked Problems Only | Show Chronic Problems Only

Concept Id	Description	Fully Specified Name	Chronic	Secondary Co
Active				
Open-angle glaucoma				
84494001	Open cleft glaucoma	Open-angle glaucoma	<input type="checkbox"/>	<input type="checkbox"/>

Notice that you can click the **Resolve** button or **Problem Status** dropdown arrow to resolve a problem, & indicate a **Resolved Reason**. We don't want to do that for this exercise, so we'll leave it **Active**.

Add Problem | Re-Code | Resolve | Set Chronic | Delete | Resources | View/Add Notes | View History | Reconcile

Add to Billing ICD List | Add to My Tracked Problems | Remove from My Tracked Problems

Accept | Cancel

Concept Id: 84494001

Description: Open cleft glaucoma | Fully Specified Name: Open-angle glaucoma

Onset Date: 03/01/2014 | Resolved Date: 03/01/2014 | Last Addressed:

Resolved By:

Problem Status: Active | Resolved Reason:

Chronic: Active | Inactive | Resolved | Clinical Status:

Secondary Condition:

Provider: ROBERT LAMAR DUFFY | Source: EHR

Side: | Location: USA FAMILY MEDICINE | Site:

Problems

Problem List | Billing ICD List

Refresh Preferences Show All Statuses Show My Tracked Problems Only Show Chronic Problems Only

Concept Id	Description	Fully Specified Name	Chronic	Secondary Co
Active				
Open-angle glaucoma				
84494001	Open cleft glaucoma	Open-angle glaucoma	<input type="checkbox"/>	<input type="checkbox"/>

Add Problem Re-Code Resolve Set Chronic Delete Resources View/Add Notes View History Reconcile

Add to Billing ICD List Add to My Tracked Problems Remove from My Tracked Problems

Accept Cancel

Concept Id: 84494001

Description: Open cleft glaucoma Fully Specified Name: Open-angle glaucoma

Onset Date: 03/01/2014 Resolved Date: 03/01/2014 Last Addressed:

Resolved By: Resolved Reason:

Problem Status: Active Clinical Status:

Chronic: Recorded Elsewhere: Source: EHR

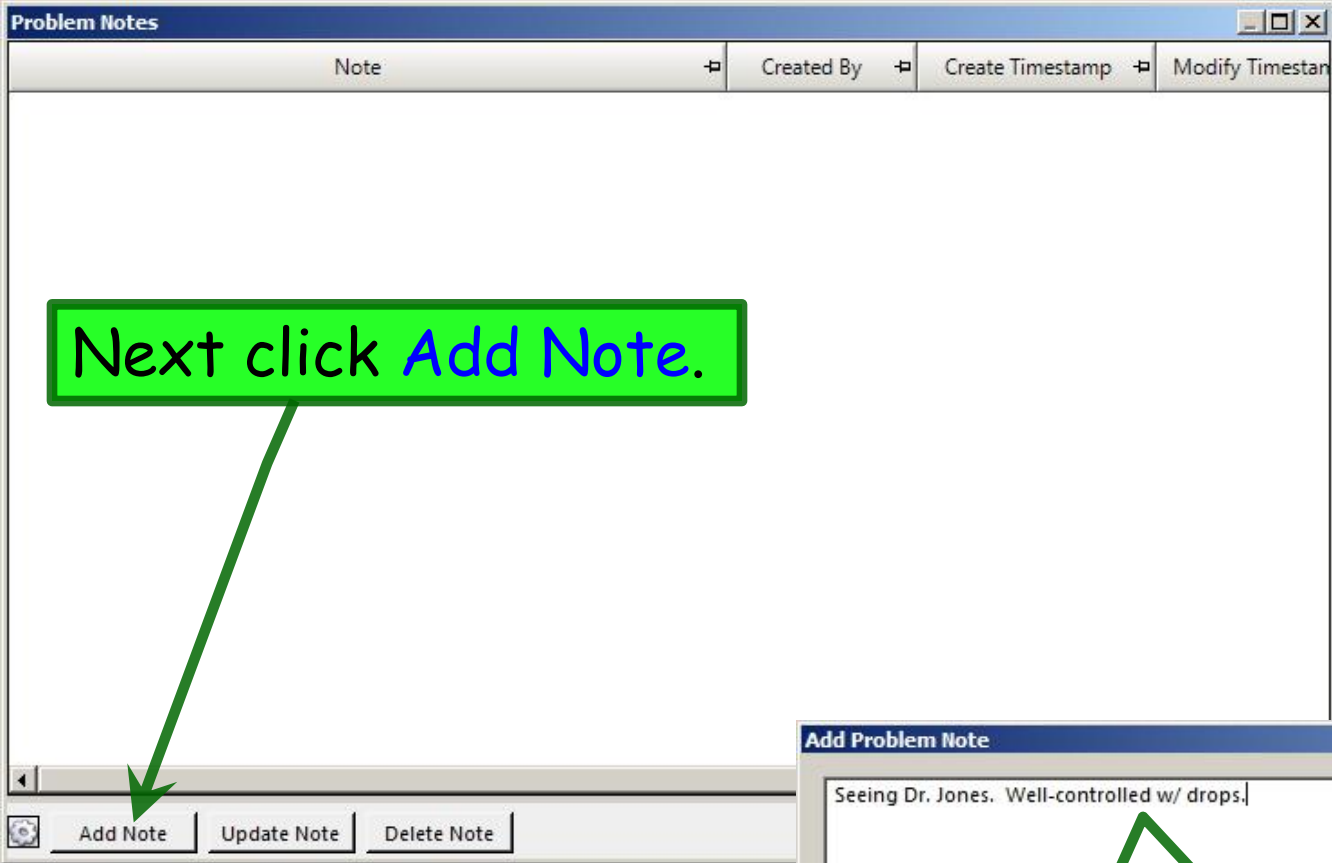
Secondary Condition:

Provider: ROBERT LAMAR DUFFY, Location: USA FAMILY MEDICINE

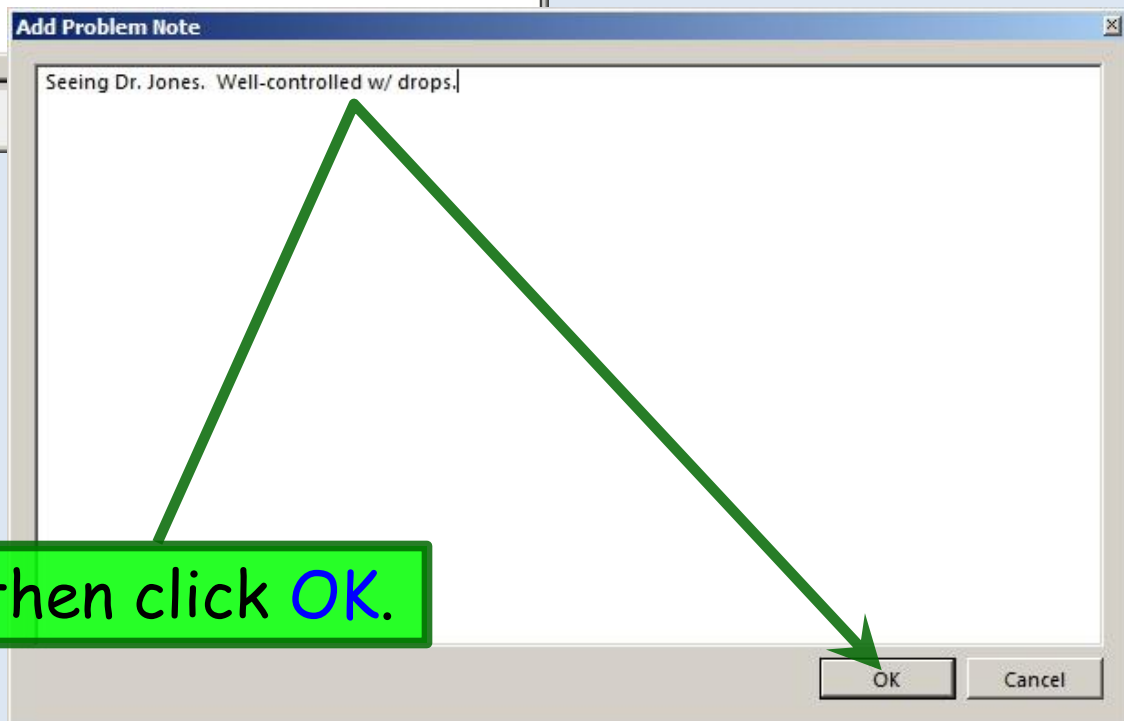
Side: Bilateral Site:

When germane, you can specify **Side & Site**.

You can also add further details. Click **View/Add Notes**.



Next click **Add Note**.



Type your entry, then click **OK**.

Note	Created By	Create Timestamp	Modify Timestamp
Seeing Dr. Jones. Well-controlled w/ drops.	Duffy, Robert L	3/1/2014 5:32:54 PM	3/1/2014 5:32:54

When done, click **Close**.

Add Note | Update Note | Delete Note | Close

Your entry displays. Note that you can update or delete a note.

When done, click **Close**.

Problems

Problem List | Billing ICD List

Refresh Preferences Show All Statuses Show My Tracked Problems Only Show Chronic Problems Only

Concept Id	Description	Fully Specified Name	Chronic	Secondary Con
Active				
Open-angle glaucoma				
84494001	Open cleft glaucoma	Open-angle glaucoma	<input type="checkbox"/>	<input type="checkbox"/>

When you've addressed all the details you need to enter, click **Accept**. You can then add other diagnoses; I'll go ahead & add diabetes & hypertension.

When done, click the **X** to close the **Problems Module**.

Add Problem Re-Code Resolve Set Chronic Delete Resources View/Add Notes View History Reconcile

Add to Billing ICD List Add to My Tracked Problems Remove from My Tracked Problems

Accept **Cancel**

Concept Id: 84494001

Description: Open cleft glaucoma Fully Specified Name: Open-angle glaucoma

Onset Date: 03/01/2014 Resolved Date: 03/01/2014 Last Addressed:

Resolved By: Resolved Reason:

Problem Status: Active Clinical Status:

Specialty Family Practice Visit Type Office Visit

Intake Histories SOAP Finalize Checkout

Your entries display in the grid.

Demographics Order Management Documents

Care Guidelines Global Days History Review

All History Review details are to be reviewed and included in visit note unless user indicates otherwise

Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem

No active problems Reviewed

Problem Description	Side	Notes	Addtl
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Type II diabetes mellitus w/o complication			

Add Edit

Note that you can update an entry by selecting it then clicking the Edit button.

Medical/Surgical/Interim

No relevant past medical/surgical history

All History Review details are to be reviewed and included in visit note unless user indicates otherwise History Review

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome

When support staff and/or providers have reviewed the Problem List, click the Reviewed checkbox. Note that the Problem List is the only section that has its own Reviewed checkbox.

Before we go any further, let's talk about History Review for all the other sections. You'll see a link at the top & at each section (Past Medical, Family, & Social History) for this.

Care Guidelines | Global Days | **History Review**

All History Review details are to be reviewed and included in visit note unless user indicates otherwise

Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem

No active problems Reviewed

Problem Description	Side	Notes	Addtl
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Type II diabetes mellitus w/o complication			

Add

Edit

History Review

History Review

Med/Surg/Interim Hx: Detailed document Reviewed, no changes (last updated 05/04/2014)
 Reviewed, updated History unobtainable:

Family: Detailed document Reviewed, no changes (last updated 05/04/2014)
 Reviewed, updated History unobtainable:

Social: Detailed document Reviewed, no changes (last updated 05/13/2014)
 Reviewed, updated History unobtainable:

Save & Close

Cancel

It brings up this popup.

It is our expectation that all historical elements are at least briefly reviewed at every encounter, so most of these details appear in our notes by default anyway. However, only *basic* Social History details are defaulted into our notes, so if you've added a lot of other details, you need to specifically select **Detailed document** for Social History.

USA History Review

Med/Surg/Interim Hx: Detailed document Reviewed, no changes (last updated 02/26/2014)
 Reviewed, updated History unobtainable:

Family: Detailed document Reviewed, no changes (last updated 02/26/2014)
 Reviewed, updated History unobtainable:

Social: Detailed document Reviewed, no changes (last updated 02/26/2014)
 Reviewed, updated History unobtainable:

Save & Close Cancel

Problem Description	Side	Notes	Addtl
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Type II diabetes mellitus w/o complication			

Add Edit

Side Date Encounter Type Outcome

Specialty ▾ Family Practice Visit Type ▾ Office Visit

🏠
Intake
Histories
SOAP
Finalize
Checkout

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | **History Review** *All History Review details are to be reviewed and included in visit note unless user indicates otherwise*

Panel Control: ⌵ Toggle ⌶ ↺ Cycle ↻

Problem List 3

Now let's move down to **Medical/Surgical/Interim History**. This section is for episodic events, usually surgeries or bouts of medical problems that limited in time frame. Click **Add**.

Add Edit

Medical/Surgical/Interim

No relevant past medical/surgical history *All History Review details are to be reviewed and included in visit note unless user indicates otherwise* [History Review](#)

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome

Interim History **Add** Edit Remove

This popup has a **Medical** section, **Surgical** section, & a grid at the bottom. The **Surgical** section is shown expanded here.

USA Past Medical History 836

Specialty: *Remember to ADD TO GRID then SAVE & CLOSE!* Panel Control:

Surgical

To add comments, click manage. Date: Date: Date:

<input type="checkbox"/> Angioplasty	<input type="checkbox"/> Colectomy	<input type="checkbox"/> Other
<input type="checkbox"/> Appendectomy	<input type="checkbox"/> Colostomy	
<input type="checkbox"/> Arthroscopy	<input type="checkbox"/> Gastric bypass	
<input type="checkbox"/> Back surgery	<input type="checkbox"/> Hernia repair	
<input type="checkbox"/> Blood transfusion	<input type="checkbox"/> Hip replacement	
<input type="checkbox"/> CABG	<input type="checkbox"/> Knee replacement	
<input type="checkbox"/> Cardiac pacemaker	<input type="checkbox"/> LASIK	
<input type="checkbox"/> Carpal tunnel release	<input type="checkbox"/> ORIF	
<input type="checkbox"/> Cataract extraction	<input type="checkbox"/> Thyroidectomy	
<input type="checkbox"/> Cholecystectomy	<input type="checkbox"/> Tonsillectomy	

Medical

Past Medical History Grid

Disease/Disorder	Side	Onset Date	Management	Side	Date	Outcome	Comment

The patient has had an appendectomy & a cholecystectomy, so we'll select those checkboxes.

Specialty: Family Practice

You can enter **date** & can click **Manage** to enter other details as desired.

Surgical

To add comments, click manage.

- Angioplasty
- Appendectomy
- Arthroscopy
- Back surgery
- Blood transfusion
- CABG
- Cardiac pacemaker
- Carpal tunnel release
- Cataract extraction
- Cholecystectomy

Date:

Manage

- Colectomy
- Colostomy
- Gastric bypass
- Hernia repair
- Hip replacement
- Knee replacement
- LASIK
- ORIF
- Thyroidectomy
- Tonsillectomy

Date:

Other

Date:

Add To Grid

Clear

Medical

Past Medical History Grid

Items that are blue lead to other picklists. Click **Arthroscopy**.

Disease/Disorder	Side	Onset Date	Management	Side	Date	Outcome	Comment

Edit

Remove

Save & Close

Cancel

Manage Past Medical History

Disease/Disorder
Disease/disorder:
SNOMED code:
Onset date: / / Side:

Management
Management:
SNOMED code:
Date: / / Side:
Facility:
Provider: (Last) (First)

Outcome/Comments
Outcome:
Comments:
Characteristics:

Ngkbn Get PMH Sec Diag

Diagnosis

- Ankle
- Elbow
- Hip
- Knee
- Shoulder
- Wrist

Refresh OK Cancel

Save to Grid & Close Cancel

Resolved
Resolved

Edi

We'll pick **Knee**, & in the rest of the popup indicate that it was the left in **2002**.



Specialty:

Remember to ADD TO GRID then SAVE & CLOSE!

Panel Control:

Surgical

To add comments, click manage.

Date:

Date:

Date:

 Angioplasty Appendectomy Arthroscopy Back surgery Blood transfusion CABG Cardiac pacemaker Carpal tunnel release Cataract extraction Cholecystectomy Colectomy Colostomy Gastric bypass Hernia repair Hip replacement Knee replacement LASIK ORIF Thyroidectomy Tonsillectomy Other**Medical****Past Medical History Grid**

Disease/Disorder	Side	Onset Date	Management	Side	Date	Outcome	Comment
			Arthroscopy knee	left	2002		RLD 06/10/2014 -

To enter something you don't see here, click **Other**.

Here, through a combination of searching & typing, I've recorded that she had some actinic keratoses frozen from her face in 2011.

Manage Past Medical History

Disease/Disorder
Disease/disorder: Actinic keratosis
SNOMED code: 201101007
Onset date: / / 2011 Side:

Management
Management: Cryo
SNOMED code:
Date: / / 2011 Side:
Facility:
Provider: (Last) (First)

Outcome/Comments
Outcome:
Comments:
RLD 03/01/2014 - On face, forehead.
Characters left: 965

When done click **Save to Grid & Close**.

Save to Grid & Close Cancel

Specialty:

Remember to ADD TO GRID then SAVE & CLOSE!

Panel Control:

 Surgical

To add comments, click manage.

 Angioplasty Appendectomy Arthroscopy Back surgery Blood transfusion CABG Cardiac pacemaker Carpal tunnel release Cataract extraction Cholecystectomy

Date:

 Colectomy Colostomy Gastric bypass Hernia repair Hip replacement Knee replacement LASIK ORIF Thyroidectomy Tonsillectomy Other

Date:

Date:

Medical**Past Medical History Grid**

Disease/Disorder	Side	Onset Date	Management	Side	Date	Outcome	Comments
Actinic keratosis		2001	Cryo		2011		RLD 06/10/2014 - RLD 06/10/2014
			Arthroscopy knee	left	2002		RLD 06/10/2014 -

Let's add some medical history. Click the Medical **Toggle Button**.

Surgical

To add comments, click manage.

 Angioplasty Appendectomy Arthroscopy Back surgery Blood transfusion CABG Cardiac pacemaker Carpal tunnel release Cataract extraction Cholecystectomy

Date:

[Manage](#) Colectomy Colostomy Gastric bypass Hernia repair Hip replacement Knee replacement LASIK ORIF Thyroidectomy Tonsillectomy

Date:

 Other

Date:

Last year the patient had hepatitis A. Click Hepatitis/liver disease.

[Add To Grid](#)[Clear](#)

Medical

Save time & avoid redundant entries: Many items here would be more properly documented on Problem List.

To add comments, click manage.

 Allergies Anemia Angina Anxiety Arthritis Asthma Atrial fibrillation Benign prostatic hypertrophy Blood clots Cancer Cardiac arrhythmia COPD Coronary artery disease Depression Diabetes

Onset Date:

 Elevated lipids Gallbladder disease GERD Headache, migraine Heart disease Heart valve disorder Hepatitis/liver disease Hypertension Irritable bowel disease Myocardial infarction Osteoporosis Renal disease Seizure disorder Stroke Thyroid disease

Onset Date:

 Other

Onset Date:

[Add To Grid](#)[Clear](#)

Disease/Disorder

Disease/disorder:

SNOMED code:

Onset date:

Outcome/Comments

Outcome:

Comments:

RLD 03/01/2014 -

Characters left: 984

Ngkbn Get PMH Sec Diag

Diagnosis

Alcoholic cirrhosis
Biliary cirrhosis, primary
Biliary cirrhosis, secondary
Cirrhosis
Cryoglobulinemia
Cryptogenic cirrhosis
Hemochromatosis, acquired
Hemochromatosis, hereditary
Hepatitis A
Hepatitis B
Hepatitis C
Hepatitis D
Hepatitis E
Hepatitis exposure
Hepatitis F
Hepatitis GBV-C
Hepatitis, alcoholic
Hepatitis, autoimmune

Refresh

OK

Cancel

& Close

Cancel

The next popup presents a list hepatic illnesses.
Double-click **Hepatitis A**.

Enter other details to the extent you know them & they are pertinent.

Manage Past Medical History [X]

Disease/Disorder

Disease/disorder: Hepatitis A

SNOMED code: 40468003

Onset date: 07 / / 2013 Side:

Management

Management: Supportive

SNOMED code:

Date: / / Side:

Facility:

Provider: (Last) (First)

Outcome/Comments

Outcome:
Resolved

Comments:
RLD 03/01/2014 - Briefly hospitalized due to protracted N/V.

Characters left: 940

Save to Grid & Close Cancel

When done click Save to Grid & Close.

- Back surgery
- Blood transfusion
- CABG
- Cardiac pacemaker
- Carpal tunnel release
- Cataract extraction
- Cholecystectomy
- Hernia repair
- Hip replacement
- Knee replacement
- LASIK
- ORIF
- Thyroidectomy
- Tonsillectomy

Add To Grid Clear

Medical

Save time & avoid redundant entries: Many items here would be more properly documented on Problem List.

To add comments, click manage. Onset Date: Onset Date: Onset Date:

- Allergies
- Anemia
- Angina
- Anxiety
- Arthritis
- Asthma
- Atrial fibrillation
- Benign prostatic hypertrophy
- Blood clots
- Cancer
- Cardiac arrhythmia
- COPD
- Coronary artery disease
- Depression
- Diabetes
- Elevated lipids
- Gallbladder disease
- GERD
- Headache, migraine
- Heart disease
- Heart valve disorder
- Hepatitis/liver disease
- Hypertension
- Irritable bowel disease
- Myocardial infarction
- Osteoporosis
- Renal disease
- Seizure disorder
- Stroke
- Thyroid disease
- Other

If you need to add something that's not on the list, click Other.

Add To Grid Clear


Past Medical History Grid

Disease/Disorder	Side	Onset Date	Management	Side	Date	Outcome	Comment
Hepatitis A		07/2013	Supportive				RLD 06/10/2014 -Briefly hospit
Actinic keratosis		2001	Cryo		2011		RLD 06/10/2014 - RLD 06/10/20
			Cholecystectomy				
			Appendectomy				

The patient had meningitis at age 5. To search for this, click the **Dropdown Arrow**.

Manage Past Medical History [X]

Disease/Disorder

Disease/disorder: 

SNOMED code:

Onset date: / / Side:

Management

Management:

SNOMED code:

Date: / / Side:

Facility:

Provider: (Last) (First)

Outcome/Comments

Outcome:

Comments:

Characters left: 984

Type meningitis then click Search.

Q meningitis

Search

Description

Fully Specified Name

Concept Id

Select

Cancel

We don't really know many details,
so just double-click **Meningitis**.

Q meningitis

Search

Description	Fully Specified Name	Concept Id
Meningitis	Meningitis	7180009
Meningitis due to coxsackie virus	Coxsackie meningitis	111878007
Meningitis due to adenovirus	Adenoviral meningitis	111850006
Meningitis due to anaerobic bacteria	Meningitis due to anaerobic bacteria	445059005
Meningitis due to congenital syphilis	Congenital syphilitic meningitis	6267005
Meningitis due to cryptococcus	Cryptococcal meningitis	14232007
Meningitis due to ECHO virus	Echovirus meningitis	192667007
Meningitis due to Escherichia coli	Escherichia coli meningitis	192655005
Meningitis due to gonococcus	Gonococcal meningitis	151004
Meningitis due to Haemophilus influenzae type B	Meningitis due to Haemophilus influenzae ty...	445198003
Meningitis due to herpes simplex virus	Herpes simplex meningitis	23291008
Meningitis due to mumps virus	Mumps meningitis	44201003
Meningitis due to proteus morganii	Morganella morganii meningitis	192659004

Results are limited to top 100. Consider refining search.

Select

Cancel

Manage Past Medical History X

Disease/Disorder

Disease/disorder: Meningitis

SNOMED code: 7180009

Onset date: / / 1967

Side:

Management

Management: Hospitalization

SNOMED code:

Date: / /

Side:

Facility:

Provider: (Last) (First)

Outcome/Comments

Outcome:

Resolved

Comments:

RLD 03/01/2014 -

Characters left: 984

Again, we'll add details as desired, then click **Save to Grid & Close**.



Save to Grid & Close Cancel

Cholecystectomy Tonsillectomy

Add To Grid

Clear

Medical*Save time & avoid redundant entries: Many items here would be more properly documented on Problem List.*

To add comments, click manage.

Onset Date:

Onset Date:

Onset Date:

 Allergies Anemia Angina Anxiety Arthritis Asthma Atrial fibrillation Benign prostatic hypertrophy Blood clots Cancer Cardiac arrhythmia COPD Coronary artery disease Depression Diabetes Elevated lipids Gallbladder disease GERD Headache, migraine Heart disease Heart valve disorder Other

Note everything we've entered has been added to the grid.

Add To Grid

Clear

Past Medical History Grid

Disease/Disorder	Side	Onset Date	Management	Side	Date	Outcome	Comment
Meningitis		1967	Hospitalization			Resolved	RLD 06/10/2014 -
Hepatitis A		07/2013	Supportive				RLD 06/10/2014 -Briefly hospit
Actinic keratosis		2001	Cryo		2011		RLD 06/10/2014 - RLD 06/10/2014
Appendectomy							

When done click **Save & Close**. (We've also added a copy of this button at the top to make navigation easier.)

Edit

Remove

Save & Close

Cancel

Everything we just entered appears on the History Tab. Click **Interim History**.



No relevant past medical/surgical history

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Meningitis		1967	Hospitalization				Resolved
Hepatitis A		07/2013	Supportive				Resolved
Actinic keratosis		2011	Cryo		2011		
			Arthroscopy knee	left	2002		

Interim History Add Edit Remove



You can use the **Interim History** button to make other entries, if you feel so moved.

Add



Encounter type:	Problem:	Management:	Date:
office visit	Glaucoma	Drops	02/17/2014

Provider:	Hospital:	Admit date:	D/C date:
Dr. Jones		//	//

Outcome/detail:

Comments:

Had ophth visit for glaucoma; she says everything was doing well.

We've entered that she's recently seen her eye doctor for a check on her glaucoma. When done, click [Save](#) then [Close](#).

« ‹ Clear For Add Delete Save → »



Specialty Family Practice Visit Type Office Visit

Home Intake **Histories** SOAP Finalize Checkout

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | **History Review** All History Review details are to be reviewed and included in visit note unless user indicates otherwise

Panel Control: Toggle Cycle

Problem List 3

Medical/Surgical/Interim

No relevant past medical/surgical history All History Review details are to be reviewed and included in visit note unless user indicates otherwise [History Review](#)

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
			Arthroscopy knee	left	2002		
Actinic keratosis		2011	Cryo		2011		
Glaucoma			Drops		02/17/2014	office visit	
Hepatitis A		07/2013	Supportive				Resolved
Meningitis		1967	Hospitalization				Resolved

Refresh Interim History Add Edit Remove

Diagnostic Studies

Display: All Specialty

Status	Order	Ordered	Interpretation	Result/Report	Date Performed	Completed	Ordering Comments
--------	-------	---------	----------------	---------------	----------------	-----------	-------------------

Notice that you can click on most column headers to sort top to bottom or bottom to top on that header, which can help when viewing a long list of entries.

Specialty v Family Practice Visit Type v Office Visit

Intake Histories SOAP Finalize Checkout

Demographics | Order Management | Document Library | Chart Abstraction

In the next section, **Diagnostic Studies**, you can manually enter a variety of test results. This would probably be most appropriate when a patient brings in a test result from another facility. Here, we can get most of our study results electronically through Soarian, so you probably won't need to do this very often. I'll skip on down.



Refresh Interim History Add Edit Remove

Diagnostic Studies

Display: All Specialty

Status	Order	Ordered	Interpretation	Result/Report	Date Performed	Completed	Ordering Comments

Add

Notice how you can collapse panels as desired; this is often faster than using the scrollbar to move down the template.

The screenshot shows a web-based medical history template. At the top, there's a browser tab for "02/26/2014 04:45 PM : 'USA Histories'". Below that, the interface includes a "Specialty" dropdown set to "Family Practice" and a "Visit Type" dropdown set to "Office Visit". A navigation bar contains buttons for "Intake", "Histories" (which is highlighted), "SOAP", "Finalize", and "Checkout". Below this, there are sub-sections for "Demographics", "Order Management", "Document Library", and "Chart Abstraction".

The main content area is divided into several panels. The "History Review" panel is currently active, showing a "Problem List" with 3 items, "Medical/Surgical/Interim", and "Diagnostic Studies". To the right of this panel, there are "Panel Control" options: "Toggle", "Cycle", and a "Cycle" button with a refresh icon. A green circle highlights three downward-pointing arrows on the right side of the "Problem List" section, indicating that these panels can be collapsed.

Below the "History Review" panel is the "Family" section. It includes two checkboxes: "No relevant family history" and "Adopted - no family history known". To the right, there's a note: "All History Review details are to be reviewed and included in visit note unless user indicates otherwise" and a "History Review" link. Below this is a table with the following columns: "Relationship", "Family Member Name", "Deceased", "Age at Death", "Condition", "Onset Age", "Cause of Death", and "Comments". The table is currently empty. At the bottom of the "Family" section, there are three buttons: "Add", "Edit", and "Remove". A green arrow points from the "Add" button to a text box at the bottom of the page.

Next is the Family History section. Click the **Add** button.

Family Health History

Specialty:

No family history of:

Relationship:

Family member name:

- ADD/ADHD
- Alcoholism
- Allergies
- Alzheimer's disease
- Arthritis
- Asthma
- Blood disorder
- Cancer
- Cardiovascular disease
- Coronary artery disease
- Coronary artery disease, prema...
- Depression
- Developmental delay
- Diabetes
- Eczema

Onset age: Cause of death:

Elevated lipids

Family relation [X]

- Brother
- Daughter
- Father
- Friend
- Half brother (M)
- Half brother (P)
- Half sister (M)
- Half sister (P)
- Maternal aunt
- Maternal grandfather
- Maternal grandmother
- Maternal uncle
- Mother
- Nephew
- Niece
- Paternal aunt
- Paternal grandfather
- Paternal grandmother
- Paternal uncle
- Sister
- Son
- Spouse
- Twin brother
- Twin sister

Close

First click in the Relationship box & choose a relative; you can type in a designation if you don't see what you need on the list. Here we'll pick father.

Relationship	Family Mem

Condition	Onset Age	Cause of Death	Comments

Save to Grid Clear

Edit Remove

Save & Close Cancel

Note that some entries are simple black checkboxes. For these, it is easy to select several at once. Here I've entered that her father had **Coronary artery disease & Hypertension**.

Specialty:

No family history of:

Relationship:

- ADD/ADHD
- Alcoholism
- Allergies
- Alzheimer's disease
- Arthritis
- Asthma
- Blood disorder
- Cancer
- Cardiovascular disease
- Coronary artery disease
- Coronary artery disease, premenopausal
- Depression
- Developmental delay
- Diabetes
- Eczema
- Elevated lipids
- Genetic disease
- Hearing deficiency
- Hypertension
- Irritable bowel disease
- Learning disability
- Mental illness
- Migraines
- Obesity
- Osteoporosis
- Peripheral vascular disease
- Renal disease
- Seizure disorder
- Stroke
- Thyroid disorder
- Other

Family member name:
Age: Onset age:
Deceased Cause of death:

Comments

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments

Click **Save to Grid**.

Specialty:

No family history of:

Relationship:

Family member name:

Alive and well Deceased

- ADD/AD
- Alcoholi
- Allergies
- Alzheim
- Arthritis
- Asthma
- Blood di
- Cancer
- Cardio
- Coronar
- Coronar
- Depress
- Develop
- Diabetes
- Eczema

Family History Expanded Conditions

Cancer

Relationship: Father Name:

Condition:	Onset age:	Cause of death:
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Comments

Ngkbn Get Family Sec Diag

Diagnosis

- Basal cell
- Bladder
- Bone
- Brain
- Breast, first degree relative, male or female
- Breast, other female relative
- Breast, other male relative
- Cervical
- Colon
- Endometrial
- Esophageal
- Gastric
- Glioblastoma
- Hodgkin's disease
- Kidney
- Leukemia
- Liver
- Lung
- Lymphoma

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments
Father				Coronary artery disease		N	
Father				Hypertension		N	

Click in the **Condition** box & you'll get another popup that allows you to specify what kind of cancer. Select **Lung**.

We'll also add that it was the Cause of death, at age 65.

No family history of:

Relationship: Family member name:

Alive and well Deceased

- ADD/AD
- Alcoholi
- Allergies
- Alzheim
- Arthritis
- Asthma
- Blood di
- Cancer
- Cardio
- Coronar
- Coronar
- Depress
- Develop
- Diabetes
- Eczema

Family History Expanded Conditions

Cancer

Relationship: Name:

Condition:	Onset age:	Cause of death:
<input type="text" value="Lung"/>	<input type="text" value="65"/>	<input checked="" type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Cause of death

Cause of death:

Onset age: Cause of death:

Other

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments
Father				Coronary artery disease		N	
Father				Hypertension		N	

When done, click Save to Grid & Close.

Family Health History

Specialty: Family Practice

No family history of:

Relationship: _____

You can also indicate a negative family history by checking **No family history of**. (You can choose a specific relative if desired, or not.)

- ADD/ADHD
- Alcoholism
- Allergies
- Alzheimer's disease
- Arthritis
- Asthma
- Blood disorder
- Cancer
- Cardiovascular disease
- Coronary artery disease
- Coronary artery disease, prema...
- Depression
- Developmental delay
- Diabetes
- Eczema

- Elevated lipids
- Genetic disease
- Hearing deficiency
- Hypertension
- Irritable bowel disease
- Learning disability
- Mental illness
- Migraines
- Obesity
- Osteoporosis
- Peripheral vascular disease
- Renal disease
- Seizure disorder
- Stroke
- Thyroid disorder

Other

Save to Grid Clear

Here I'll select **Alcoholism**, then click **Save to Grid**.

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments
Father				Coronary artery disease		N	
Father				Hypertension		N	
Father				Cancer, lung	65	Y	
Father		Y					

Edit Remove

Save & Close Cancel

Your entries display on the Histories Tab, & we can continue down to the Social History section.

Demographics
Care Guidelines
Problem List 3

Medical/Surgical/Interim
Diagnostic Studies
Family

No relevant family history Adopted - no family history known *All History Review details are to be reviewed and included in visit note unless user indicates otherwise* [History Review](#)

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments
				No family history of Alcoholism		N	
				No family history of Diabetes mellitus		N	
Father		Y					
Father				Coronary artery disease		N	
Father				Hypertension		N	
Father		Y		Cancer, lung	65	Y	
Mother				Irritable bowel disease		N	
Mother				Asperger's syndrome		N	
Sister				Chronic pain		N	

In this example we'll demonstrate the entry of adult social history. (At the end of the lesson, we'll look at some aspects that differ for pediatric social history.)

Social History

Substances	Encounter Date	Tobacco Use	Tobacco Type	Smoking Status	Usage Per Day	Pack Years	Date Quit
<ul style="list-style-type: none"> Tobacco Alcohol/Caffeine 							
<ul style="list-style-type: none"> Statuses Lifestyle Occupation Comment Diet History Environmental 	Encounter Date:Time						

Click Add.

- ❖ Tobacco
- ❖ Alcohol/Cocaine
- ❖ Statuses
- ❖ Lifestyle
- ❖ Occupation
- ❖ Comments
- ❖ Diet History
- ❖ Environmental



Save & Close

Panel Control:

Toggle



Cycle



Tobacco Use

Have you ever used tobacco? No/never Yes Unknown [Exclusions](#) Reviewed

Updated:

/ /

Smoking Tobacco Use

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Pack year:	Age started:	Age stopped:	Tobacco type:	Use daily:	Usage per day:	Years used:	Age started:	Age stopped:

The Social History popup opens. Note the left-side navigation that allows you to move among several aspects of social history. It begins at the top with Tobacco.

[Click here to see tobacco history prior to 7.9.1](#)

Encounter Date	Tobacco Type	Usage Per Day	Years Used	Pack Year	Status	Age Started	Age Stopped
----------------	--------------	---------------	------------	-----------	--------	-------------	-------------

Note also that some of the popups have a good bit of vertical navigation, which can be easy to overlook.

Efforts To Quit Tobacco

Have you ever tried to quit using tobacco? No/never Yes Unknown

Tobacco type:	Month:	Day:	Year:	Longest tobacco free:	Cessation method:	Relapse reason:
<input type="text"/>	Quit:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add

Update

Clear

- ❖ Tobacco
- ❖ Alcohol/Caffeine
- ❖ Statuses
- ❖ Lifestyle
- ❖ Occupation
- ❖ Comments
- ❖ Diet History
- ❖ Environmental



Save & Close

Panel Control:

Toggle



Cycle



Tobacco Use

 Have you ever used tobacco? No/never Yes Unknown [Exclusions](#)
 Reviewed

Updated:

/ /

Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Pack year:	Age started:	Age stopped:
<input type="checkbox"/> Cigarette	<input type="checkbox"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigarillo	<input type="checkbox"/>	<input type="text"/> cigarillos	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigar	<input type="checkbox"/>	<input type="text"/> cigars	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Pipe	<input type="checkbox"/>	<input type="text"/> pipes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Smoking status:

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Age started:	Age stopped:
<input type="checkbox"/> Chewing	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Smokeless	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Snuff	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tobacco use status:

Historical Use

[Click here to see tobacco history prior to 7.9.1](#)

Encounter Date	Tobacco Type	Usage Per Day	Years Used	Pack Year	Status	Age Started	Age Stopped

One thing that may be a little counterintuitive is that there is both a **Smoking Status** & **Tobacco Status**. This is because, while you would like to document all forms of tobacco abuse, Meaningful Use rules specifically reference smoking. These two status interact, but there may be some times when you will need to manually intervene to make sure both statuses are properly documented.

- ❖ Tobacco
- ❖ Alcohol/Caffeine
- ❖ Statuses
- ❖ Lifestyle
- ❖ Occupation
- ❖ Comments
- ❖ Diet History
- ❖ Environmental

Tobacco Use

Have you ever used tobacco? No/never Yes Unknown [Exclusions](#) Reviewed Updated:

Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Pack year:	Age started:	Age stopped:
<input type="checkbox"/> Cigarette	<input type="checkbox"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigarillo	<input type="checkbox"/>	<input type="text"/> cigarillos	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigar	<input type="checkbox"/>	<input type="text"/> cigars	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Pipe	<input type="checkbox"/>	<input type="text"/> pipes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Smoking status:

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Age started:	Age stopped:
<input type="checkbox"/> Chewing	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Smokeless	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Snuff	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tobacco use status:

Efforts To Quit Tobacco

Have you ever tried to quit using tobacco? No/never Yes Unknown

Tobacco type:	Month:	Day:	Year:	Longest tobacco free:	Cessation method:	Relapse reason:
<input type="text"/>	Quit:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Update Clear

Save & Close Panel Control: Toggle Cycle

Historical Use

Encounter Date	Tobacco Type	Usage Per Day	Years Used	Pack Year	Status	Age Started	Age Stopped
----------------	--------------	---------------	------------	-----------	--------	-------------	-------------

If smoking/tobacco history has been previously entered, & nothing has changed, just click the **Reviewed** checkbox, then **Save & Close** the popup.

- ❖ Tobacco
- ❖ Alcohol/Caffeine
- ❖ Statuses
- ❖ Lifestyle
- ❖ Occupation
- ❖ Comments
- ❖ Diet History
- ❖ Environmental



Save & Close

Panel Control:

Toggle



Cycle



Tobacco Use

 Have you ever used tobacco? No/never Yes Unknown [Exclusions](#)
 ReviewedUpdated:

Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Pack year:	Age started:	Age stopped:
<input type="checkbox"/> Cigarette	<input type="checkbox"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigarillo	<input type="checkbox"/>	<input type="text"/> cigarillos	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigar	<input type="checkbox"/>	<input type="text"/> cigars	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Pipe	<input type="checkbox"/>	<input type="text"/> pipes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Smoking status:

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Age started:	Age stopped:
<input type="checkbox"/> Chewing	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Smokeless	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Snuff	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tobacco use status:

Historical Use

[Click here to see tobacco history prior to 7.9.1](#)

Encounter Date	Tobacco Type	Usage Per Day	Years Used	Pack Year	Status	Age Started	Age Stopped

But when you need to enter this history, first address the **Have you ever used tobacco** question. If the answer is **No/never**, you're done. In this example, the answer is **Yes**.

 Tobacco type: Month: Day: Year: Longest tobacco free: Cessation method: Relapse reason:

Quit:

Add

Update

Clear

- ❖ Tobacco
- ❖ Alcohol/Caffeine
- ❖ Statuses
- ❖ Lifestyle
- ❖ Occupation
- ❖ Comments
- ❖ Diet History
- ❖ Environmental

Now complete details to the extent they are known. Click the **Cigarette** checkbox.

Tobacco Use

Have you ever used tobacco? No/never Yes Unknown [Exclusions](#)

Reviewed Updated: 03/02/2014

Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Pack year:	Age started:	Age stopped:
<input type="checkbox"/> Cigarette	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigarillo	<input type="checkbox"/>	<input type="text"/> cigarillos	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigar	<input type="checkbox"/>	<input type="text"/> cigars	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Pipe	<input type="checkbox"/>	<input type="text"/> pipes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Smoking status:

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Age started:	Age stopped:
<input type="checkbox"/> Chewing	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Smokeless	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Snuff	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tobacco use status:

Historical Use

Then click the **Use daily** checkbox.

Encounter Date	Day	Age Started	Age Stopped

Efforts To Quit Tobacco

Have you ever tried to quit using tobacco? No/never Yes Unknown

Tobacco type:	Month:	Day:	Year:	Longest tobacco free:	Cessation method:	Relapse reason:
<input type="text"/>	Quit: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Our patient smokes 1 pack per day. Click in the Usage box & enter 1 in the ensuing popup.

Usage per day

7	8	9	+
4	5	6	
1	2	3	
0	.	-	

Clear

OK Cancel

Cigarettes packs/units

Cigarettes Packs

Close

Then click in the per day box & select Packs in the next popup.

Social History

- Tobacco
- Alcohol/...
- Statuses
- Lifestyle
- Occupation
- Comments
- Diet History
- Environmental

Tobacco Use

Have you ever used tobacco? No/never Yes Unknown Exclusions Reviewed Updated: 03/02/2014

Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Pack year:	Age started:	Age stopped:
<input type="checkbox"/> Cigarette	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigarillo	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigarillos	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Cigars	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Pipes	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Smoking status: Smoker, current status unk

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Age started:	Age stopped:
<input type="checkbox"/> Chewing	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Smokeless	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Snuff	<input type="checkbox"/>	<input type="text"/> units	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tobacco use status:

Click here to see tobacco history prior to 7.9.1

Date	Tobacco Type	Usage	Start	Status	Age Started	Age Stopped
------	--------------	-------	-------	--------	-------------	-------------

Efforts To Quit Tobacco

Have you ever tried to quit tobacco? No Yes

Tobacco type: Quit: Relapse reason:

Add Update Clear

- ❖ Tobacco
- ❖ Alcohol/Caffeine
- ❖ Statuses
- ❖ Lifestyle
- ❖ Occupation
- ❖ Comments
- ❖ Diet History
- ❖ Environmental

35 Pack Years will be calculated.

Tobacco Use

Have you ever used tobacco? No/never Yes Unknown [Exclusions](#)

Panel Control:

Reviewed Updated: 03/02/2014

Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Pack year	Age started:	Age stopped:
<input checked="" type="checkbox"/> Cigarette	<input checked="" type="checkbox"/>	1 Packs	35	35.00		
<input type="checkbox"/> Cigarillo	<input type="checkbox"/>	cigarillos				
<input type="checkbox"/> Cigar	<input type="checkbox"/>	cigars				
<input type="checkbox"/> Pipe	<input type="checkbox"/>	pipes				

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:	Years used:	Age started:	Age stopped:
<input type="checkbox"/> Chewing	<input type="checkbox"/>	units			
<input type="checkbox"/> Smokeless	<input type="checkbox"/>	units			
<input type="checkbox"/> Snuff	<input type="checkbox"/>	units			

*Smoking status: Heavy tobacco smoker

Tobacco use status: Heavy cigarette smoker (20-39 cigs/day)

Notice that both **Smoking & Tobacco Status** have been updated (though you can manually enter them using the dropdown arrows if that's ever necessary).

Then scroll down to review **Tobacco Cessation data**.

Efforts To Quit Tobacco

Have you ever tried to quit using tobacco? No/never Yes Unknown

Tobacco type:	Month:	Day:	Year:	Longest tobacco free:	Cessation method:	Relapse reason:
<input type="text"/>	Quit:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

You can document all sorts of details about efforts to quit smoking. With a brief amount of practice you'll figure that out, so I'm not going into that at the moment.

Efforts To Quit Tobacco

Have you ever tried to quit using tobacco? No/never Yes Unknown

Tobacco type: Month: Day: Year: Longest tobacco free: Cessation method: Relapse reason:

Quit:

Encounter Date	Tobacco Type	Date Quit	Longest Tobacco Free	Cessation Method	Relapse Reason

Tobacco Cessation Information

Tobacco cessation discussed:

[+ Tobacco Cessation](#)

Date	Counseled By	Order	Status	Description	Code	Tobac

Passive Smoke Exposure

But look at the Tobacco cessation discussed checkbox.

Your clinic may have a policy that nurses rooming patients always advise tobacco users to quit. If so, the nurse can click the **Tobacco cessation discussed** checkbox.

Tobacco type: Month: Day: Year: Longest tobacco free: Cessation method: Relapse reason:

Quit:

Encounter Date	Tobacco Type	Date Quit	Longest Tobacco Free	Cessation Method	Relapse Reason

Tobacco Cessation Information

Tobacco cessation discussed:

Date	Counseled By	Order	Status	Description	Code	Tobac

A sample dialog might go as follows:
"Do you still smoke? Of course, we recommend that everyone quit smoking. [Check the **Tobacco cessation discussed** checkbox.] Would you like to talk to the doctor today about help quitting?"
If the answer is YES, add **Smoking Cessation** to today's **Reasons For Visit**.

Passive Smoke Exposure

In the ensuing popup, click the Tobacco cessation discussion dropdown arrow.

Have you ever tried to quit using tobacco? No/never Yes Unknown

Tobacco Cessation Discussed

Tobacco cessation discussion:

Year: Longest tobacco free: Cessation method: Relapse reason:

History of Tobacco Cessation Discussions

Completed Date	Discussion

Longest Tobacco Free	Cessation Method	Relapse Reason
----------------------	------------------	----------------

Ngkbn Get Dbpicklist Items

List Item
Pregnancy smoking education
Referral to stop-smoking clinic
Smoking cessation education
Smoking effects education

Choose from the picklist; here we'll select Smoking cessation education.

Date	Counseled By	Order

Passive Smoke Exposure

*Smoking status: Heavy tobacco smoker

Tobacco use status: Heavy cigarette smoker (20-39 cigs/day)

Historical Use

Efforts To Quit Tobacco

Click Add, then Save & Close.

Tobacco Cessation Discussed

Tobacco cessation discussion:
Smoking cessation education

Add Update Clear

History of Tobacco Cessation Discussions

Completed Date	Discussion

Remove

Save & Close Cancel

...e: Cessation method: Relapse reason:

Add Update Clear

Cessation Method	Relapse Reason

Remove

✦ Tobacco Cessation

Date	Counseled By	Order	Status	Description	Code	Tobac

Passive Smoke Exposure

Save & Close Cancel

Tobacco type: Month: Day: Year: Longest tobacco free: Cessation method: Relapse reason:
Quit:

Encounter Date	Tobacco Type	Date Quit	Longest Tobacco Free	Cessation Method	Relapse Reason
----------------	--------------	-----------	----------------------	------------------	----------------

While we're here, note that passive smoke exposure can be documented.

Tobacco Cessation Information
 Tobacco cessation discussed: [Tobacco Cessation](#)

Date	Counseled By	Order	Status	Description	Code	Tobac
------	--------------	-------	--------	-------------	------	-------

Passive Smoke Exposure

Have you ever had passive smoke exposure? No/never Yes
Exposure in home environment: No Yes
Other exposure locations: Comments:

But enough of this. If we were done, we could just click Save & Close. But let's scroll back to the top & move to the Alcohol/Caffeine heading.

- ◆ Tobacco
- ◆ Alcohol/Caffeine
- ◆ Statuses
- ◆ Lifestyle
- ◆ Occupation
- ◆ Comments
- ◆ Diet History
- ◆ Environmental

Alcohol:
Do you drink alcohol? No Yes Formerly
Type of alcohol: Frequency: Amount: Last drink:

Caffeine:
Do you drink/consume caffeine? No Yes
Type of caffeine: Caffeine per day:

Save & Close Cancel

Enter detail to the degree it is known & pertinent. There are several popups that offer to help you with this, but often it is easiest just to type in a brief entry like this.

Typically one would enter at least tobacco & alcohol history. But let's review the other offerings. Move to the **Statuses** heading.

- ◆ Tobacco
- ◆ Alcohol/Caffeine
- ◆ **Statuses**
- ◆ Lifestyle
- ◆ Occupation
- ◆ Comments
- ◆ Diet History
- ◆ Pediatric/adolescent Social History
- ◆ Environmental

Detailed document Reviewed, updated Reviewed, no change

Race: Ethnicity:

Preferred language: Language spoken at home:

Country of birth: Hand dominance:

Education/Employment/Occupation/Military Experience:

Employment: Degree obtained:

Occupational hazards:

Household:

Current status:

Previous divorce:

Housing status:

Comments:

Enter details to the degree they're known or pertinent. Some demographic info may already display. In particular, note that we need to record language, since it is one of the Meaningful Use criteria. Occupation is a bit redundant, since there is a separate section for that.

Note the **Pediatric/adolescent Social History** link. This gives you the chance to toggle to & from the pediatric version of the social history—particularly useful for adolescents. It's a little odd that the **Statuses** heading is the only place you see it.

Now move to **Lifestyle**.

Save & Close

Cancel

- ◆ Tobacco
- ◆ Alcohol/Caffeine
- ◆ Statuses
- ◆ Lifestyle
- ◆ Occupation
- ◆ Comments
- ◆ Diet History
- ◆ Environmental

Sleep Patterns:Changes in sleep patterns: No Yes[Details](#)**Lifestyle:**Activity level: [Cultural Practices](#)Health club member: Now Previously NeverType of exercise: Exercise frequency: Hours/week:Hobbies/activities: Diet history: Animals in the home: No Yes**Religious/Spiritual:**Do you have a religious affiliation? No YesDo you practice your religion? No YesDo you have spiritual beliefs? No YesReligion: Is religion/spirituality an important part of your life? No YesAgrees to blood/blood products? No Yes**Home Environment/Safety:**Smoke detectors in home? No YesCarbon monoxide detectors in home? No YesIs the patient at risk for falls? No YesFalls in the last year? No YesDid the fall(s) result in injury? No YesRadon in the home? No YesFirearms at home? No Yes**Recent Travel:** Out of state Out of country Travel exposure

As before, enter as much detail as desired, then move to Occupation.

[Exclusions](#)[Fall Risk Plan](#)Pool/spa at home: No YesSeat belt use? No YesHome heating: Number/falls: Details: Treated Untested[Save & Close](#)[Cancel](#)

Social History - Occupation X

- ◆ Tobacco
- ◆ Alcohol/Caffeine
- ◆ Statuses
- ◆ Lifestyle
- ◆ Occupation
- ◆ Comments
- ◆ Diet History
- ◆ Environmental

Employment:

Phone:
 Ext:

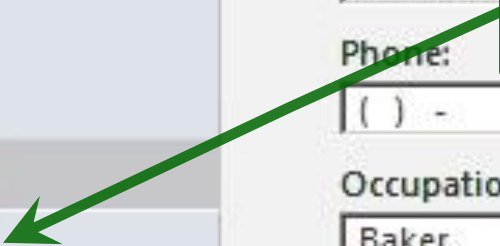
Occupation:

Employment status:

Restrictions:

Retired:

Enter occupational data as desired, then move to **Comments**.



Social History - Comments

- ◆ Tobacco
- ◆ Alcohol/Caffeine
- ◆ Statuses
- ◆ Lifestyle
- ◆ Occupation
- ◆ Comments
- ◆ Diet History
- ◆ Environmental

Comments:

Crimean War reenactor & trebuchet enthusiast.

While you've got all these headings, it's nice to have a spot to be able to free-type other social history notes.

Diet History gives you a tedious way to record meals that seems impractical, unless that is the entire focus of the visit, so instead let's move to [Environmental](#).

- ◆ Tobacco
- ◆ Alcohol/Caffeine
- ◆ Statuses
- ◆ Lifestyle
- ◆ Occupation
- ◆ Comments
- ◆ Diet History
- ◆ Environmental

Panel Control: Toggle ↶ ↷ Cycle ↺**Residence**Residence: 1 2Type of residence: Age of building: Length of time at current address: years monthsSmoker in home: No YesRelationship to smoker: Central heating/cooling: No YesType of heat: Type of bed: Down bedding: No Yes Dust mite cover on mattress: No YesDust mite cover on pillow: No YesBedroom contents: Type of floors: Vacuum: Damp moldy areas of house: No YesAllergy symptoms increased at work: No YesYard: Animals at home: No Yes Number of animals:

Add

Update

Clear

Enter data to your heart's content. When done, save everything & close this popup to return to the Histories Tab.

AnimalsResidence: 1 2Animal type: How long owned?: years monthsKept inside: No YesKept in bedroom: No Yes

Add

Update

Clear

Encounter Date	Residence #	Animal Type	How Long Owned	Kept Inside	Kept in Bedroom

Your entries display on the **Histories Tab**. You can filter data by selecting headings on the left.

(Note that only a subset of the data displays here, since it would be impossible to display everything in this limited space. If you need to review or edit other details, click the **Add** button again.)

Last documented All 

Some basics appear in visit notes; further details appear only if popups reviewed [History Review](#)

Substances	Encounter Date	Smoking Status	Ever Used Tobacco?	Tobacco Type	Usage Per Day	Pack Years	Date Quit
<input checked="" type="checkbox"/> Tobacco	04/13/2014	Heavy tobacco smoker	Yes	Cigarette	1 Packs	35.00	
<input type="checkbox"/> Alcohol/Caffeine							
Statures							
Lifestyle							
Occupation							
Comment							
Diet History							
Environmental							

Developmental History

Confidential History

Add

Now click the **Confidential History** button.

Intake Note

Confidential - Alcohol/Drug [X]

Include all confidential information in the social history document with patient permission

Alcohol/Drug

Psychiatric

Abuse/Incarceration

Sexual Practices/STI's

Provider Comments

Alcohol Use:

Age started: Years

Sought treatment for alcohol abuse: No Yes

Involved in a 12-step program? No Yes

Have you had withdrawal problems, seizures or blackouts from alcohol or drugs? No Yes

Emergency medical attention required due to intoxication: No Yes

Family HX of alcoholism: No Yes

Drug Use/Abuse: [Cultural Activities](#)

Uses drugs: No Yes Formerly

Type: <input type="text"/>	Freq: <input type="text"/>	Route: <input type="text"/>	<input type="checkbox"/> Quit:
Type: <input type="text"/>	Freq: <input type="text"/>	Route: <input type="text"/>	<input type="checkbox"/> Quit:
Type: <input type="text"/>	Freq: <input type="text"/>	Route: <input type="text"/>	<input type="checkbox"/> Quit:

Sought treatment for drug abuse: No Yes

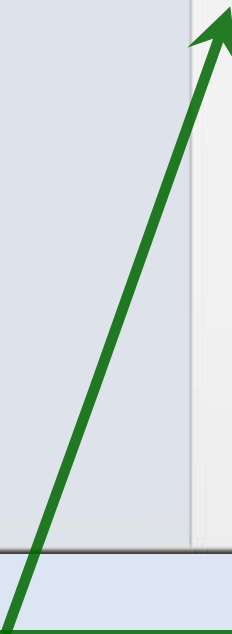
Outpatient Inpatient

Involved in a 12-step program? No Yes

Emergency medical attention required due to drug use: No Yes

Family HX of drug abuse: No Yes

Ok Cancel



Here you have the opportunity to document other aspects of the social history that are not included on the previous popups.

Include all confidential information in the social history document with patient permission

Alcohol/Drug

Psychiatric

Abuse/Incarceration

Sexual Practices/STI's

Provider Comments

Alcohol Use:

Age started: YearsSought treatment for alcohol abuse: No YesInvolved in a 12-step program? No YesHave you had withdrawal problems, seizures or blackouts from alcohol or drugs? No YesEmergency medical attention required due to intoxication: No YesFamily Hx of alcoholism: No Yes

Now perhaps you're thinking "Isn't all medical information confidential?" Yes, of course, & many of the issues listed here are things we would commonly ask. A better way to think of this popup is information that is not subject to subpoena. Unless you click the **Include all...** checkbox, this info won't be included in your visit note. This is done so you could theoretically generate notes that could be turned over to the court without further review.

At USA any requested records are reviewed & redacted as appropriate; since information here is often necessary for thorough documentation of a visit, feel free to include this in your visit notes as appropriate.

Specialty Family Practice Visit Type Office Visit

Intake Histories SOAP Finalize Checkout

Demographics Order Management Document Library Chart Abstraction

Care Guidelines Global Days History Review

All History Review details are to be reviewed and included in visit note unless user indicates otherwise

Panel Control: Toggle Cycle

Problem List 3

Medical/Surgical/Interim
Diagnosis
Family
Social

Note that information you've entered via Confidential History doesn't display on the Histories Tab; you'll have to click the Confidential History button again to see it.

History Review All History Review details are to be reviewed and included in visit note unless user indicates otherwise

Last documented All

- Substances
 - Tobacco
 - Alcohol/Caffeine
- Statuses
- Lifestyle
- Occupation
- Comment
- Diet History
- Environmental

Encounter Date	Tobacco Use	Tobacco Type	Smoking Status	Usage Per Day	Pack Years	Date Quit
02/26/2014	Yes	Cigarette	Heavy tobacco smoker	1 Packs	35.00	

Confidential History Add

Intake Note

But now let's go back to the top of the template & talk about a couple other things.

We just recorded a history of smoking, so we'll add Tobacco Abuse to the Problem List, as previously demonstrated.

02/26/2014 04:45 PM : "USA Histories" x

Specialty ▾ Family Practice Visit Type ▾ Office Visit

Intake Histories SOAP Finalize Check out

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review *All History Review details are to be reviewed and included in visit note unless user indicates otherwise*

Panel Control: Toggle Cycle

Problem List 3

Show chronic Show my tracked problem No active problems Reviewed

Problem Description	Side	Notes	Addl
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Type II diabetes mellitus w/o complication			

Add Edit

We can also record her pregnancy history & other gynecologic information by clicking **OBGYN Details** on the Information Bar.

BooBoo Quagmire (F) DOB: 01/04/1962 (52 years) Weight: 156.00 lb (70.76 Kg) Allergies: (2) Problems: (4) Diagnoses: (0) Medications: (0)

Address: 555 Knock Kneer Drive MRN: 000000007767 Emergency Relation: PCP: DUFFY, ROBERT LAMAR ...
Mobile, AL 36604 Insurance: BCBS OF ALABAMA Emergency Phone: Referring:
Contact: (251) 515-1234 (Home) NextMD: No Pharmacy 1: LINCOLN PHARM... Rendering: DUFFY, ROBERT LAMAR ...

Alerts **OBGYN Details** Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

02/26/2014 04:45 PM : "USA Histories" x

Specialty ▾ Family Practice Visit Type ▾ Office Visit **TOB** **HTN** **DM** **CAD** ⚙

Intake **Histories** SOAP Finalize Checkout

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | **History Review** *All History Review details are to be reviewed and included in visit note unless user indicates otherwise* Panel Control: Toggle Cycle

Problem List 4

Show chronic Show my tracked problem No active problems Reviewed

Problem Description	Side	Notes	Addtl
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Tobacco abuse			
Type II diabetes mellitus w/o complication			

OBGYN Synopsis

Detailed document
 Reviewed, no changes
 Reviewed, updated

History unobtainable
Reason:

Last update/detailed doc:

Primary OBGYN provider:

Provider this encounter:

Primary care provider:

Gynecologic History:

Menopausal stage:
 Premenopausal
 Perimenopausal
 Postmenopausal

LMP:

Menopause detail:
Age:
Year:
Type:

Hysterectomy:
 No
 Yes
Type:

Age of Menarche:

Pregnancy History:

G P T P A L

Currently pregnant: No Yes Possible Not pertinent

Details

Safer Sex Information/Contraception History:

Include information in the document

Sexual orientation:

Sexually active:
 No
 Yes
 Previously

Practices safer sex:
 No
 Yes
 Sometimes

Safer sex detail:

Birth control:

Save & Close Cancel

You can enter several details directly. To enter pregnancy history, click the **Details** button.

Enter data in the white boxes, & the program will summarize it in the gray boxes.

Parity Detail

Gravida/Parity:
G: T P A L

Currently pregnant:
 No Yes Possible Not pertinent

Full term: Premature: Abortion induced: Abortion spontaneous: Ectopic: Living: C-section: SVD: Multiple Births:

Pregnancy History:

Pregnancy #	Baby #	Date	Gestational Age	Labor(hrs)	Weight	Sex	Place of Delivery	Delivery Type	Anesthesia

Save & Close Cancel

If desired you can double-click on the **grid** & enter details about each pregnancy.

When done click **Save & Close**.

OBGYN Synopsis

Detailed document
 History unobtainable
 Reviewed, no changes
 Reviewed, updated

Reason:

Last update/detailed doc:

Primary OBGYN provider:

Provider this encounter:

Primary care provider:

Gynecologic History:

Menopausal stage:
 Premenopausal
 Perimenopausal
 Postmenopausal

LMP:

Menopause detail:
Age:
Year:
Type:

Hysterectomy:
 No
 Yes
Type:

Age of Menarche:

Pregnancy History:

G P T P A L

Currently pregnant: No Yes Possible Not pertinent

Enter any other details as desired.
When done click **Save & Close**.

Details

Safer Sex Information/Contraception History:

Include information in the document

Sexual orientation:

Sexually active:
 No
 Yes
 Previously

Practices safer sex:
 No
 Yes
 Sometimes

Safer sex detail:

Birth control:

Finally, notice the **Risk Indicators**, which appear at the top of most templates to alert you to high-risk conditions. The Tobacco risk indicator has already changed to red because of the tobacco history we entered earlier.

The screenshot displays a patient's medical record interface. At the top, patient information is shown: Name: Boo Boo Quagmire (7), DOB: 01/04/1962 (52 years), Weight: 196.88 lb (70.76 kg), Allergies: (0), Problems: (4), Diagnoses: (6), Medications: (6). Below this, contact and insurance details are provided: Address: 555 Knock Knee Drive, Mobile, AL 36604; Contact: (251) 555-1234 (Home); MRN: 00000007767; Insurance: BCBS OF ALABAMA; NextMD: No. Emergency and pharmacy information is also listed: Emergency Relation: (blank), Emergency Phone: (blank), Pharmacy 1: LINCOLN PHARM...; PCP: DUFFY, ROBERT LAMAR ...; Referring: (blank); Rendering: DUFFY, ROBERT LAMAR ...

The main content area shows a visit history for 02/26/2014 04:45 PM. The visit is categorized as Specialty: Family Practice, Visit Type: Office Visit. The navigation bar includes Intake, Histories (selected), SOAP, Finalize, and Checkout. Below the navigation bar, there are tabs for Demographics, Order Management, Document Library, and Chart Abstraction. A section for Care Guidelines, Global Days, and History Review is visible, with a note: "All History Review details are to be reviewed and included in visit note unless user indicates otherwise".

The Risk Indicators section is highlighted with a green oval. It contains four indicators: TOB (Tobacco Use) with a red icon, HTN (Hypertension) with a question mark icon, DM (Diabetes Mellitus) with a question mark icon, and CAD (Coronary Artery Disease) with a question mark icon. A gear icon for configuration is located to the right of these indicators. A green arrow points from the text above to the TOB indicator, and another green arrow points from the text below to the gear icon.

At the bottom of the interface, there are buttons for Refresh, Add, and Edit.

Sometimes, when the wind is right & Jupiter aligns with Mars, some of the other Risk Indicators will convert as you enter the corresponding history. But many times you'll need to click the configure icon to manually set this.


Risk Factors Config

No risk indicators

Tobacco:

Smoking status:

Tobacco use:

Tobacco cessation discussed 

Tobacco Usage:

Enc Date	Use	Type	Total Pk Yrs
02/26/2014	yes	Cigarette	35.00

Hypertension: Yes No Unknown

Diabetes: Yes No Unknown

CAD: Yes No Unknown

While tobacco has been taken care of, we need to click the bullets for Hypertension Yes, Diabetes Yes, & Coronary Artery Disease No. When done click Save & Close.

All Risk Indicators are now configured.

02/26/2014 04:45 PM : "USA Histories" X

Specialty ▾ Family Practice Visit Type ▾ Office Visit

Intake **Histories** SOAP Finalize Checkout

Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | **History Review** *All History Review details are to be reviewed and included in visit note unless user indicates otherwise*

Panel Control: [Dropdown] Toggle [Left Arrow] [Right Arrow] Cycle [Refresh] [Close]

Problem List 4

Show chronic Show my tracked problem No active problems Reviewed

Problem Description	Side	Notes	Addtl
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Tobacco abuse			
Type II diabetes mellitus w/o complication			

Refresh Add Edit

Now, as promised, let's briefly look at **Pediatric Social History** to see how it differs. Click **Add**.

02/07/2014 04:00 PM : "*Histories" x

Specialty ▾ Pediatrics Visit Type ▾ Well child

Intake **Histories** SOAP Finalize Checkou

Birth History | Demographics | Order Management | Document Library | Chart Abstraction

Care Guidelines | Global Days | History Review

Panel Control: Toggle ↕ ↺ Cycle ↻

Problem List 0

Medical/Surgical/Interim

Social

History Review

Substances	Encounter Date:Time	02/07/2014 04:00 PM
Tobacco	Child Care Provider	0
	Days/week	0
► Relationships	Child Care Provider	0
Home Environment	Days/week	0
Education	Child Care Provider	0
Nutrition	Days/week	0
Comment	Child Care Provider	0
Diet History	Days/week	0
Environmental	Child Care Provider	0
	Days/week	0
	Child Care Provider	0

Confidential History Add

The popup initially opens on Relationships. Enter details as desired, then click **Home Environment**.

Pediatric Social History - Relationships

Detailed document Reviewed, updated Reviewed, no changes History unobtainable

Age: Historian: Last updated/detailed doc: ⓘ

Preferred language:

Child Care:

Provider:	Days/week:	Days/weeks:	facility name:
<input type="checkbox"/> Mother	<input type="text"/>	<input checked="" type="checkbox"/> Daycare	<input type="text" value="5"/>
<input type="checkbox"/> Father	<input type="text"/>	<input type="checkbox"/> Sitter	<input type="text"/>
<input type="checkbox"/> Grandparent	<input type="text"/>	<input type="checkbox"/> Self	<input type="text"/>
<input type="checkbox"/> Sibling	<input type="text"/>	<input type="checkbox"/> Relative:	<input type="text"/>
<input type="checkbox"/> Nanny	<input type="text"/>	<input type="checkbox"/> Neighbor/friend	<input type="text"/>

Relationships:

Resides with:
Primary:
Time spent:

Secondary:
Time spent:

Parent/guardian relationship	Occupation
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Maternal depression screening performed
 Maternal depression screening result discussed

Parents' marital status:

Siblings: How many? Birth order:

Relationship with sibling(s):

Cooperates with family/friends: No Yes
Cooperates with teachers: No Yes
Has enough friends: No Yes
Has friends of both sexes: No Yes
Concerns about relationship with family/friends/others: No Yes

Tobacco Exposure:
Smokers at home? No Yes

Once again record your entries,
then move to Education.



- Tobacco
- Relationships
- Home Environment
- Education
- Nutrition/Elimination
- Comments
- Adult Social History

Age: Historian: Last updated/detailed doc: ⓘ

Preferred language: Language spoken at home:

Hand dominance: Right Left Ambidextrous

Home Environment:

Neighborhood:

Housing Status:

Home type:

Home age:

Home affords adequate privacy: No Yes

Home affords adequate safety: No Yes

Water source: Municipal Well Bottle

Is water chlorinated? No Yes

Is water fluoridated? No Yes

Is there lead in home? No Yes Removed Unknown

Safety:

Uses bike/skating helmet: No Yes

Car restraints: Car seat: face rear Booster None

Car seat: face front Seat belt

Carbon monoxide detector: No Yes

Smoke detectors: No Yes

Radon in home: No Yes Untested Treated

Pool/spa at home: No Yes

Pets/animals at home: No Yes Type of animals:

Firearms in the home: No Yes [Firearms](#)

- Tobacco
- Relationships
- Home Environment
- Education
- Nutrition/Elimination
- Comments
- Adult Social History

Note there are a few items here beyond "education."
 When done, go to **Nutrition/Elimination**.

Education:

School name:

Grade in school: Repeated any grades: No Yes Grade(s):

Grades earned: Why?

Performing: Below grade level At grade level Above grade level

Likes school: No Yes Truancy: No Yes

Suspended or expelled: No Yes

Learning disability: No Yes

Special needs: No Yes

Gifted program: No Yes

College prep: No Yes

High school graduate: No Yes

Sleep:

Takes naps: No Yes

Sleeps with parents: No Yes

Sleeps through the night: No Yes

Minimum 8.5 hrs sleep nightly: No Yes

Nightmares/sleep problems: No Yes

Activity:

Hours per day:

Exercise/sports:

TV/computer games:

Internet:

Recent Travel:

Out of state

Out of country

Travel exposure

Comments

Say what you have to say, then go to **Comments**.

- Tobacco
- Relationships
- Home Environment
- Education
- Nutrition/Elimination
- Comments

Detailed document Reviewed, updated Reviewed, no changes History unobtainable

Nutrition:

No concerns

WIC referral: No Yes

Concerns:

Liquid

	Ozs/day:	Type of liquid:	Frequency:	Ozs/feed:
Formula:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Milk:	<input type="text"/>	<input type="text"/>		
Juice:	<input type="text"/>	<input type="text"/>		
Water:	<input type="text"/>	<input type="text"/>		

Drinks from:

Bottle

Cup

Breast: Duration: Frequency:

Prefers one side: Right Left No preference

Solid

Age solids introduced: month

Baby food

Table food

Adequate diet

	Amount:	Measurement:
Fruits:	<input type="text"/>	<input type="text"/>
Vegetables:	<input type="text"/>	<input type="text"/>
Cereals:	<input type="text"/>	<input type="text"/>
Meat:	<input type="text"/>	<input type="text"/>

Elimination:

Bladder

No concerns

Concerns:

Wet diapers/day:

Color:

Bowel

No concerns

Concerns:

BM/day:

Color:

Consistency:

Save & Close

Cancel

Note that you have access to **Tobacco & Adult Social History**, which is particularly useful for adolescents.

Pediatric Social History - Comments

Tobacco

Relationships

Home Environment

Education

Nutrition/Elimination

Comments

Adult Social History

Comments:

This is the first of her children that mother has breast fed.

Save & Close Cancel

When done click **Save & Close**.

This concludes the NextGen Past Medical, Social, & Family History Documentation demonstration.

A conclusion is the place where you got tired of thinking.