MOUNT NITTANY® HEALTH

*Past, Family, and Social History Documentation*

MEDITECH
EXPANSE

This course will guide you through the use of the various tools included in the Expanse Documentation Template System for recording Past Medical and Surgical History, Family History, and Social History.

Subtle on screen elements of the LIVE system may vary from what is shown within this course; however, the functionality is as shown.

Documentation Templates in Expanse may include a section called PFSH. This stands for Past, Family, and Social History. These sections may or may not have information already in them. In this example, we'll use a patient who is new to our practice with no information in these areas. We've opened a template and scrolled down to the PFSH section for you. You'll see 'pop out' icons for each of the four sections in this area. The pop outs, referred to as 'Launch Overlay' icons, for Medical and Surgical History open the same overlay so you can use either. Click on the 'Launch Overlay' icon for Medical History.
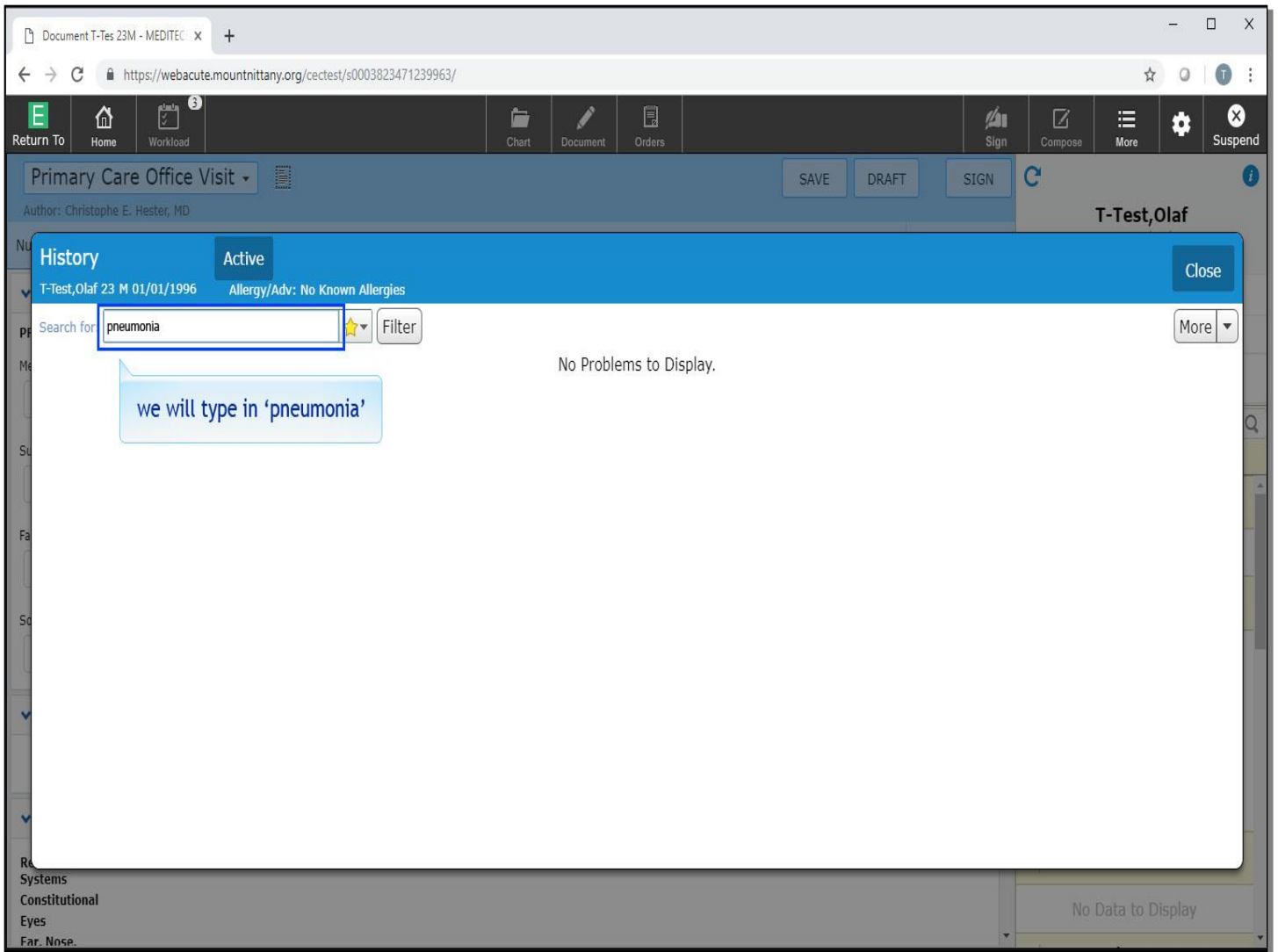
You are now viewing a problem look up screen. The cursor is already in the 'Search for' field. The patient reports a history of pneumonia several years ago. We'll type 'pneumonia' for you.

Here you will view a list of options from which to choose. We will scroll down a little to see if another option better fits what you are looking for.

You could select 'Pneumonia', but it is important to indicate that this was community acquired. Let's look at the powerful search technique that can be used in problem searches. Click in the 'Search for' field.

https://webacute.mountnittany.org/cectest/s0003823471239963/

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Primary Care Office Visit ▾

Author: Christophe E. Hester, MD

T-Test,Olaf

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History | **Active**

T-Test,Olaf 23 M 01/01/1996   Allergy/Adv: No Known Allergies

Close

Search for: `pneumo acq comm` ⭐ ▾ | Filter

More ▾

Add	Ac					Add to Problems	Family	Add to My	Onset	ICD Code	
			Pneumonia as manifestation of parasitic disease	J16.9						Z90.49	
	> Sta		Pneumonia associated with acquired immune deficiency	B20							
	> Th						☑			E04.1	💬
	> Co		*we will type in 'pneumo acq comm'*	J18.9						J18.9	
	☆		**Pneumonia** due to adenovirus	J12.0							
	☆		**Pneumonia** due to aerobic bacteria	J15.6							
	☆		**Pneumonia** due to anaerobes	J15.8							
	☆		**Pneumonia** due to anaerobic bacteria	J15.8							
	☆		**Pneumonia** due to Ascaris species	B77.81							
	☆		**Pneumonia** due to avian influenza	J09.X1							
	☆		**Pneumonia** due to Bordetella parapertussis	A37.11							
	☆		**Pneumonia** due to Chlamydia	J16.0							
	☆		**Pneumonia** due to Chlamydia pneumoniae	J16.0							
	☆		**Pneumonia** due to Chlamydia psittaci	J16.0							
	☆		**Pneumonia** due to Chlamydia species	J16.0							
	☆		**Pneumonia** due to drug resistant Streptococcus pneumoniae	J13							
	☆		**Pneumonia** due to E. coli	J15.5							
	☆		**Pneumonia** due to enterobacter aerogenes	J15.6							

Systems
Constitutional
Eyes
Ear, Nose,

No Data to Display

This time we'll type a few letters of each of the words for a community acquired pneumonia for you. In the 'Search for' field we will type in 'pneumo acq comm'.

Note that regardless of the order of the partial words entered, Expanse was able to find a number of variations of Community Acquired Pneumonia. Click on 'Community Acquired Pneumonia'.

This is now added to the medical history part of the chart. The text is green, indicating that it hasn't been saved yet. We can add more items before saving.

We'll type some shorthand for thyroid cyst. In the 'Search for' field, we will type 'thyr cyst'.

You are presented with options that range from generic, such as Thyroid cyst, to more granular, including Persistent thyroglossal duct cyst. For this example, select 'Thyroid cyst'.

This is now added to the History, but in this case, we want to say more about it. Click on the chevron to the left of 'Thyroid cyst'.

The screen opens to a Problem Detail view which includes a 'Problem Comment' field. Here information about a problem can be entered that will stay with that problem until it is changed or deleted by another user. Click in the 'Problem Comment' field.

This problem has been followed by ultrasound and you want to keep track of this data. We'll type in the information for you.

To close the Thyroid cyst details, click on the chevron next to the problem name.

This Thyroid cyst is also an Active Problem. To have this appear on the Problem List without entering it a second time, click in the check box under 'Add To Problems'.

Problems can have a Status. When a New Problem is added, we've defaulted to a blank Status. To change a Status, click on 'Acute' in the Status column for the 'pneumonia' diagnosis.

The table of options seen here is the same as for the Problem List in Assessment and Plan. The 'Active' column will keep the problem in the visible part of the Past Medical History. 'R I R' refers to Resolved, Inactive, and Ruled Out.

These Problems will no longer be easily visible in the Medical History area. You'll note that deleting problems is handled in this way. For the pneumonia, you would like to keep this in view, but want to specify that this is Resolved. Doing this is optional and not required. Click the 'Resolved' radio button in the Active column.

Next, we'll enter a surgical history item. You don't need to exit the Past Medical History to enter surgical. Just click in the 'Search for' field again.

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Primary Care Office Visit ▾

Author: Christophe E. Hester, MD

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T-Test,Olaf

History   Active

T-Test,Olaf 23 M 01/01/1996   Allergy/Adv: No Known Allergies   Exit | Save

Search for | s/p gall bladder | ⭐▾ | Filter   More ▾

Add	Active		Category	Status	Add to Problems	Family	Add to My	Onset	ICD Code	
📄	› Thyro	we will type in 's/p gall bladder'	Medical	Acute	✔	☐	☐		E04.1	💬 ✕
📄	› Comr		Medical	Resolved	☐	☐	☐		J18.9	✕

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Systems
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Eyes
Ear, Nose,

No Data to Display

We'll type in 's/p gall bladder' for you.

Notice that Expanse has offered you the first two options for Status post cholecystectomy. For this patient, click on 'Status post laparoscopic cholecystectomy'.

Before clicking Save, note that Expanse has appropriately chosen the Surgical category for this procedure. Once you are finished with this simple patient, click the 'Save' button for this overlay.

The medical problems are in the Medical category and the surgical problems are in the Surgical category. Let's enter some Family History. Click the 'Launch Overlay' icon for Family History.
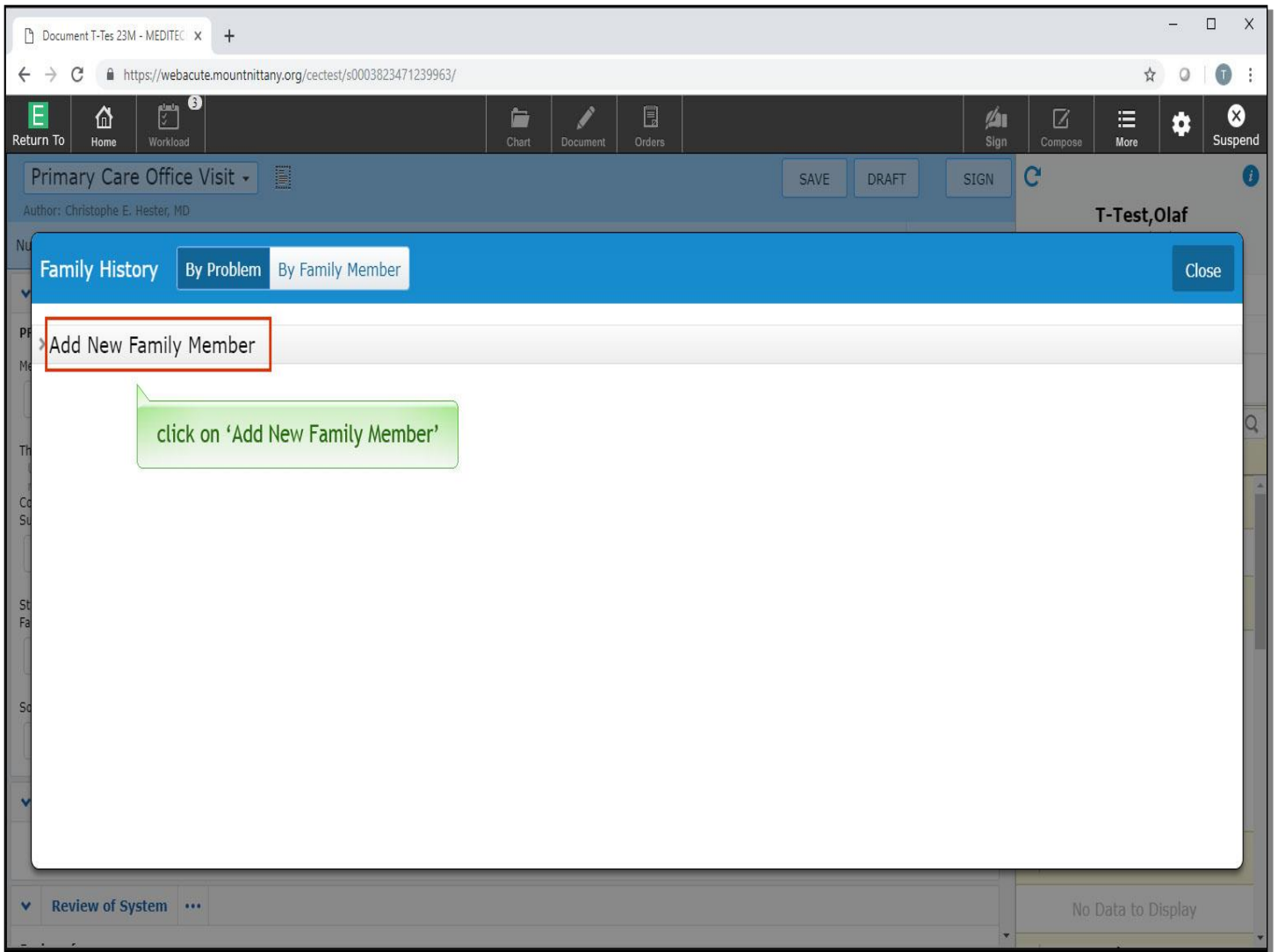
The default view for Family History is to document by family member. This is an easy way to document a specific issue relating to a particular family member. To begin, click on 'Add New Family Member'.

The 'Family Member' field is required, as indicated by the red asterisk. You can search or pick from a drop down. Click the drop down arrow.

Click on 'Father'.

The other fields shown are optional. For Problem Noted, there is a default response of 'No'. If you did nothing else but Save from here, Expanse would record that the patient's father had no medical problems. In this case, the father has a history of colorectal cancer. Click on 'Colorectal Cancer'.

For optional fields to document more details about this problem, click the drop down arrow.
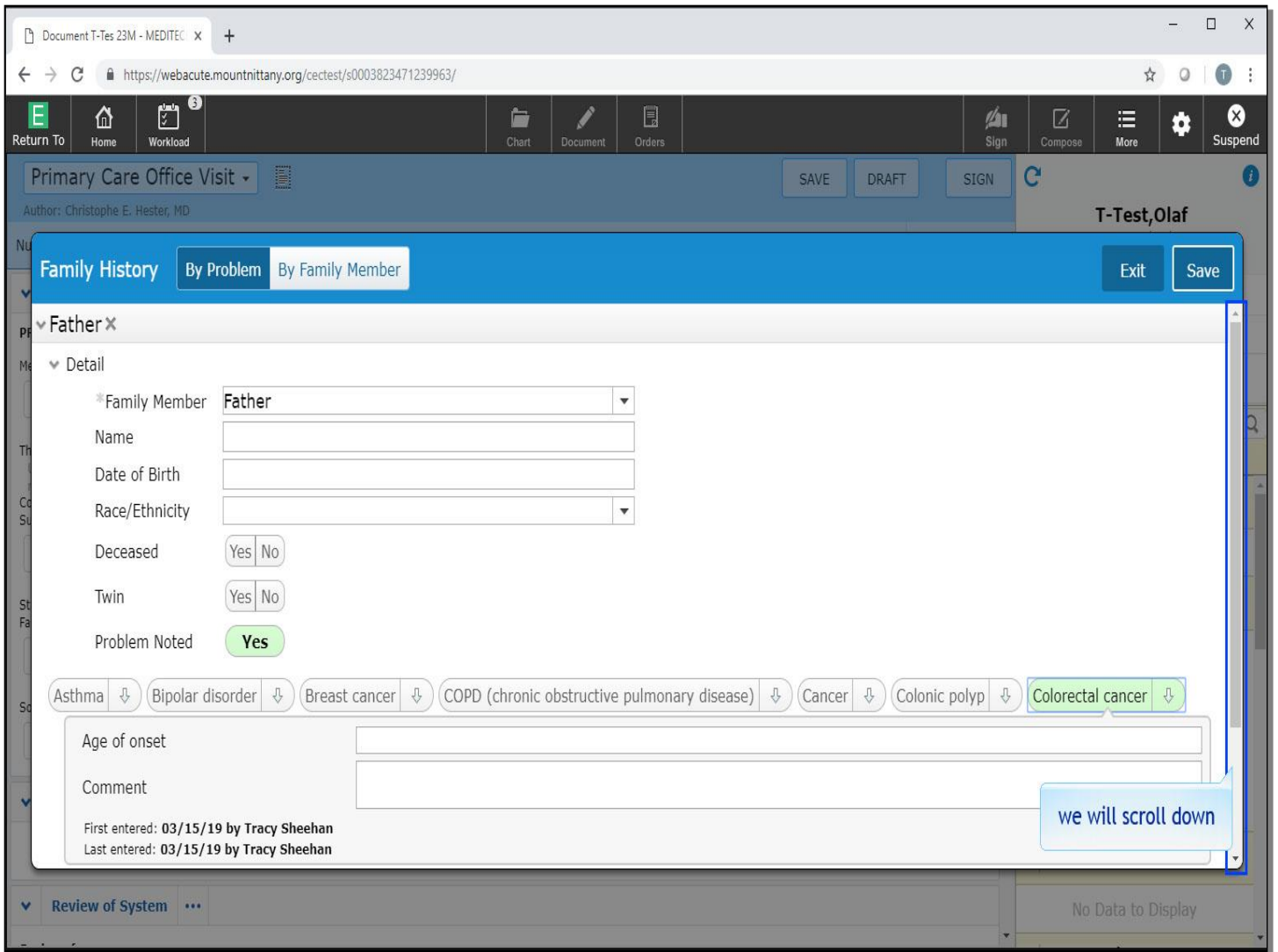
You can see a number of problems are listed as options. You can also add a specific problem that isn't already suggested for you. We'll scroll down for you.

Click on 'Add'.

This will bring up the 'Add New Problem' field. We'll type in 'asbestosis' for you.

Click on 'Asbestosis'.

At the bottom of this overlay, you can see that if you want to, you can add more family members. Another way to handle Family History is to document By Problem. To do this, click the 'By Problem' button at the top of the overlay.

You'll notice a list of possible issues family members might have. An advantage of working from this screen is that this is the easiest way to indicate that a patient has NO family history of a specific problem. For example, click the 'No' option for Diabetes.

This will indicate that there is No known family history of Diabetes for this patient. Click on the chevron for 'COPD'.
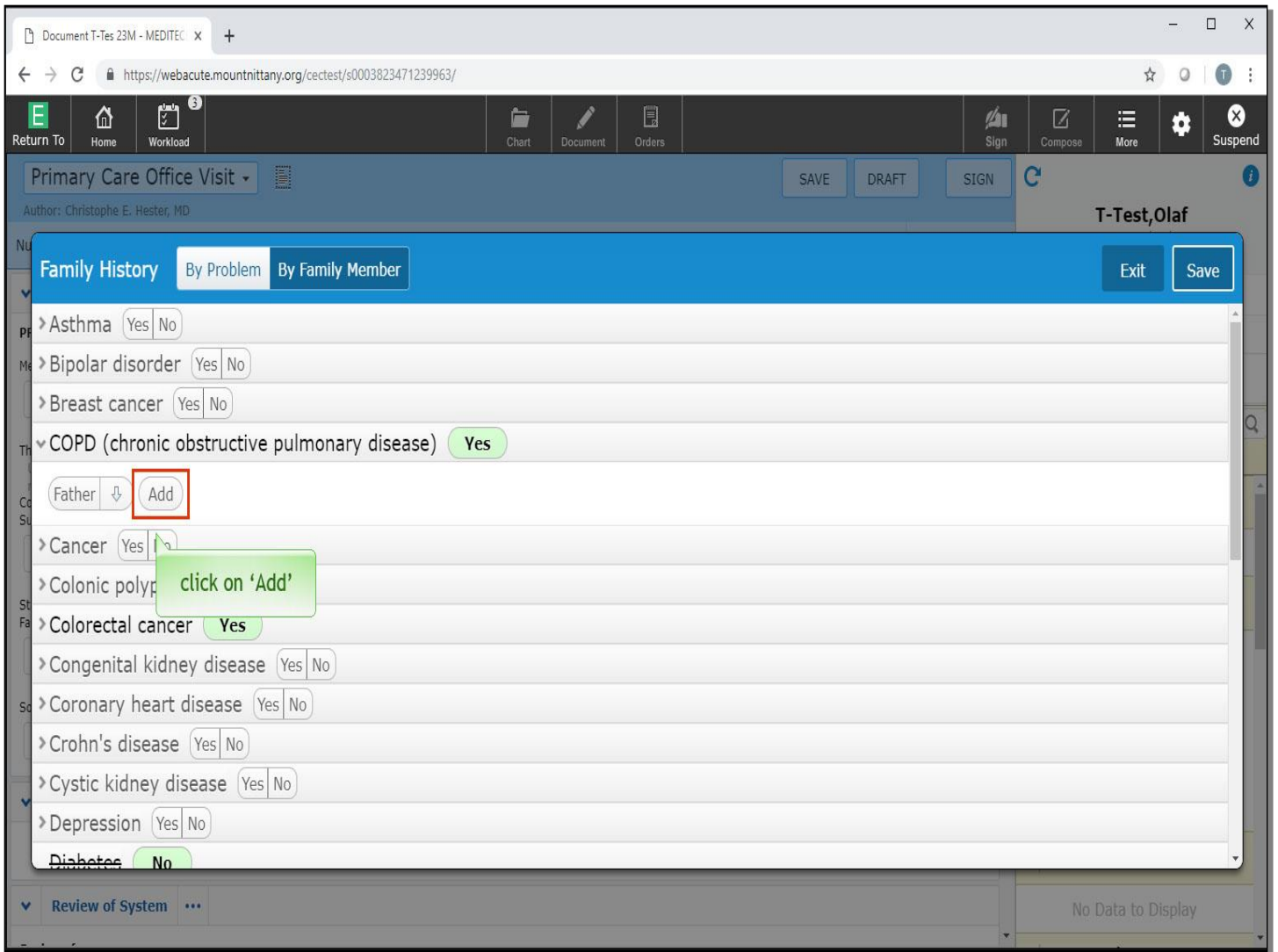
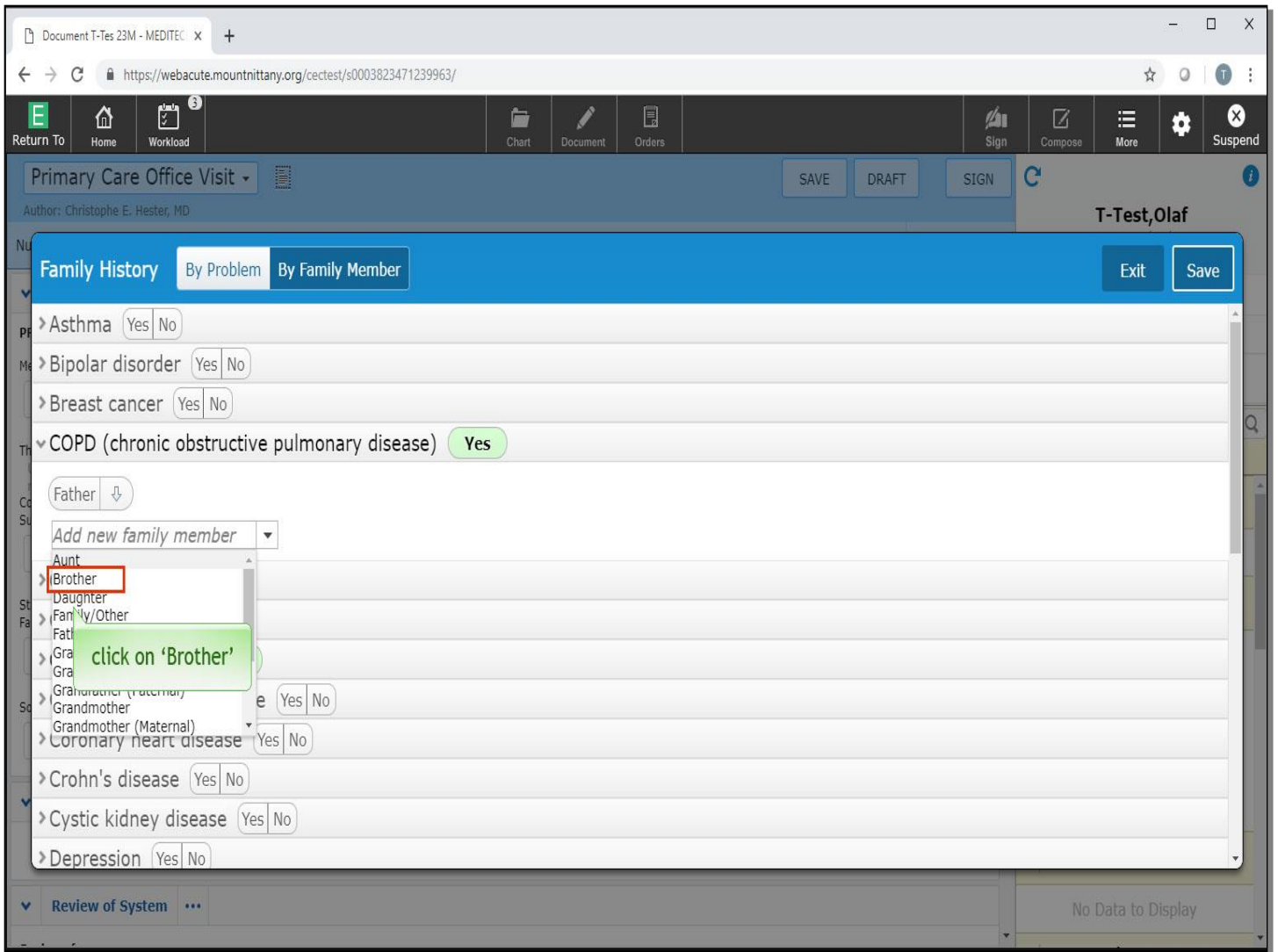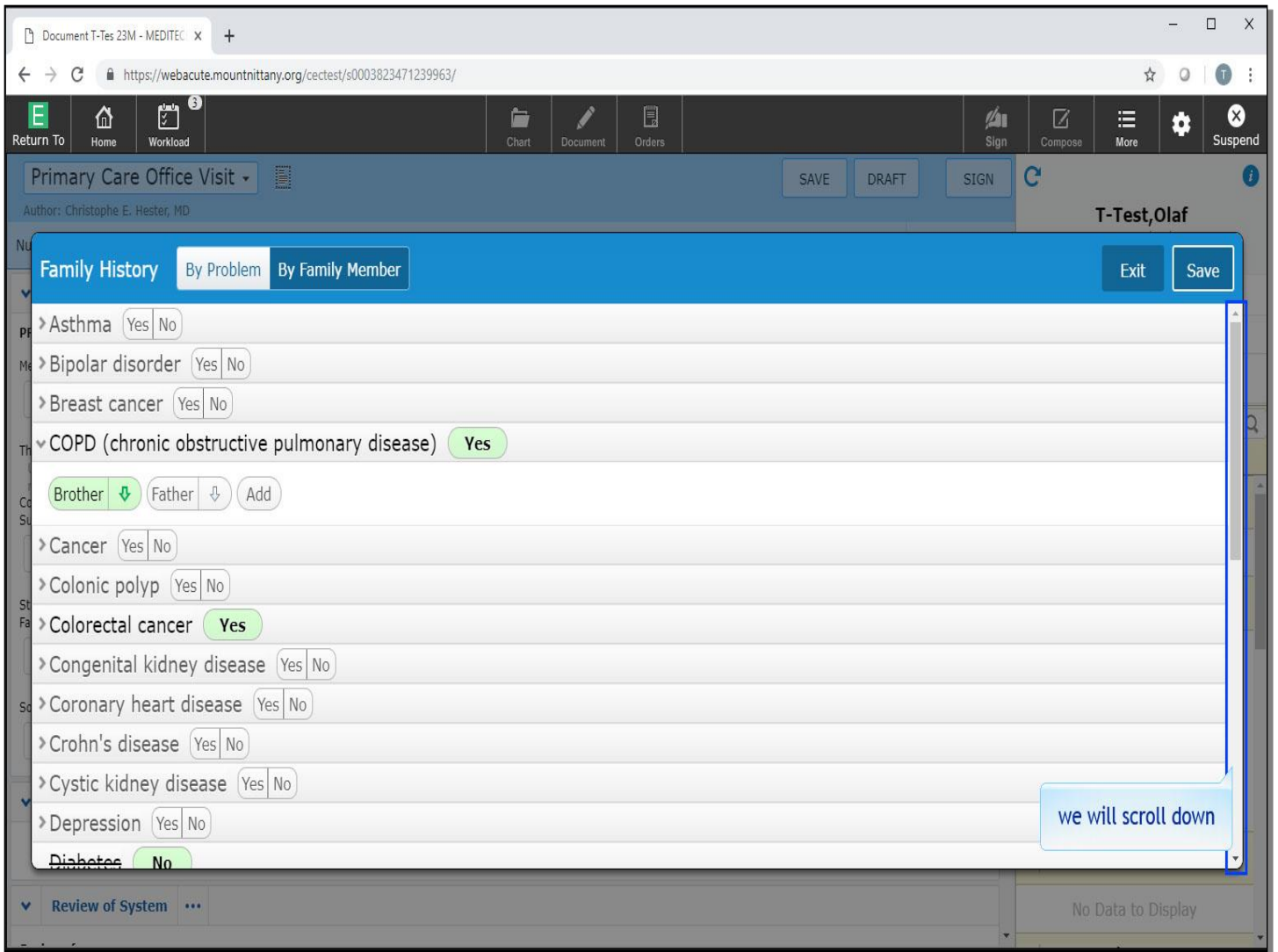Because we've already added the father as a family member, we can include his 'COPD' history with one more click. Click on 'Add'.

Here, we can add the patient's brother by clicking the drop down arrow.

From the options, click on 'Brother'.

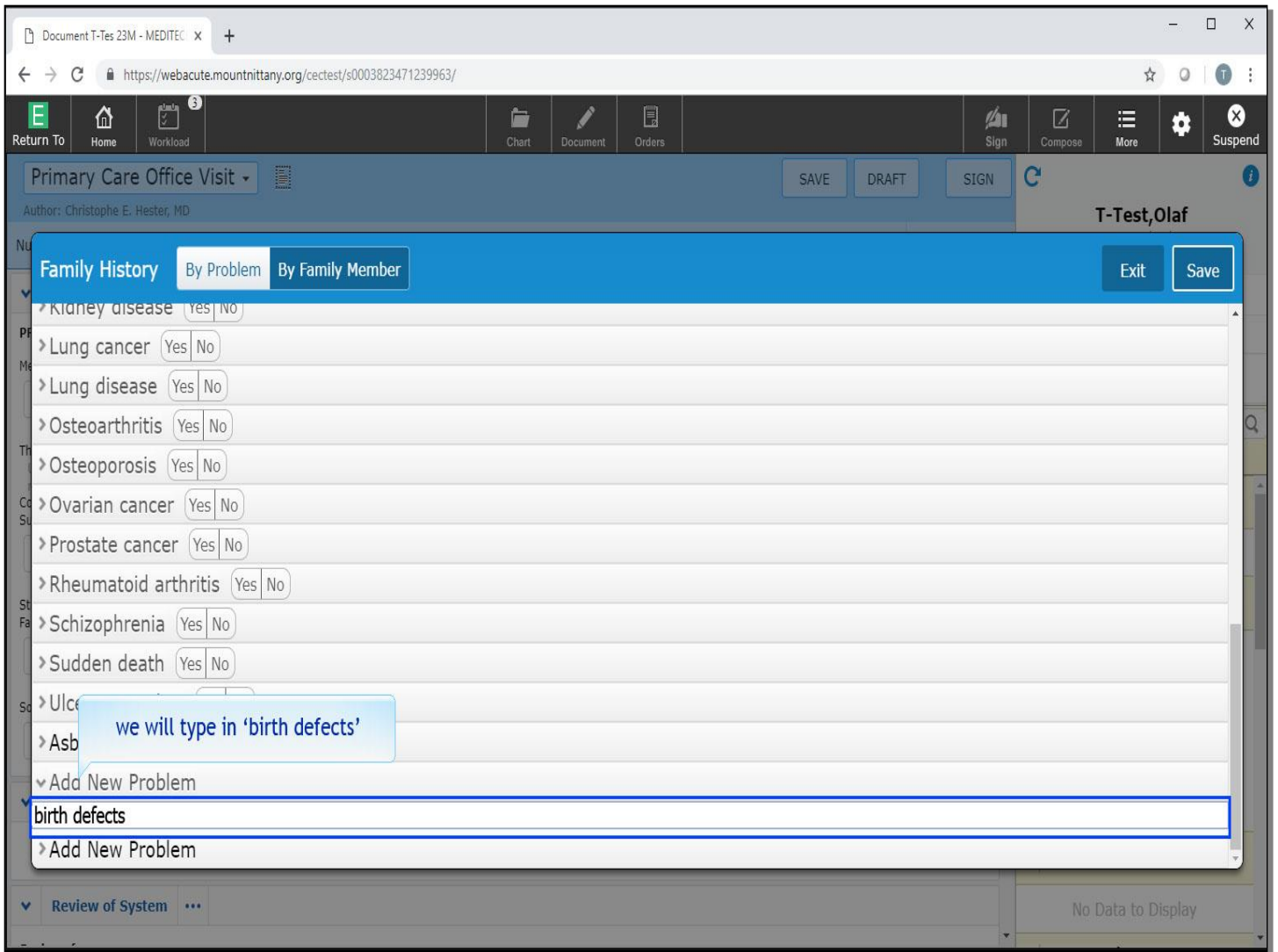Finally, for adding family history by problem, we can add conditions. We'll scroll to the bottom for you.

Click on 'Add New Problem'

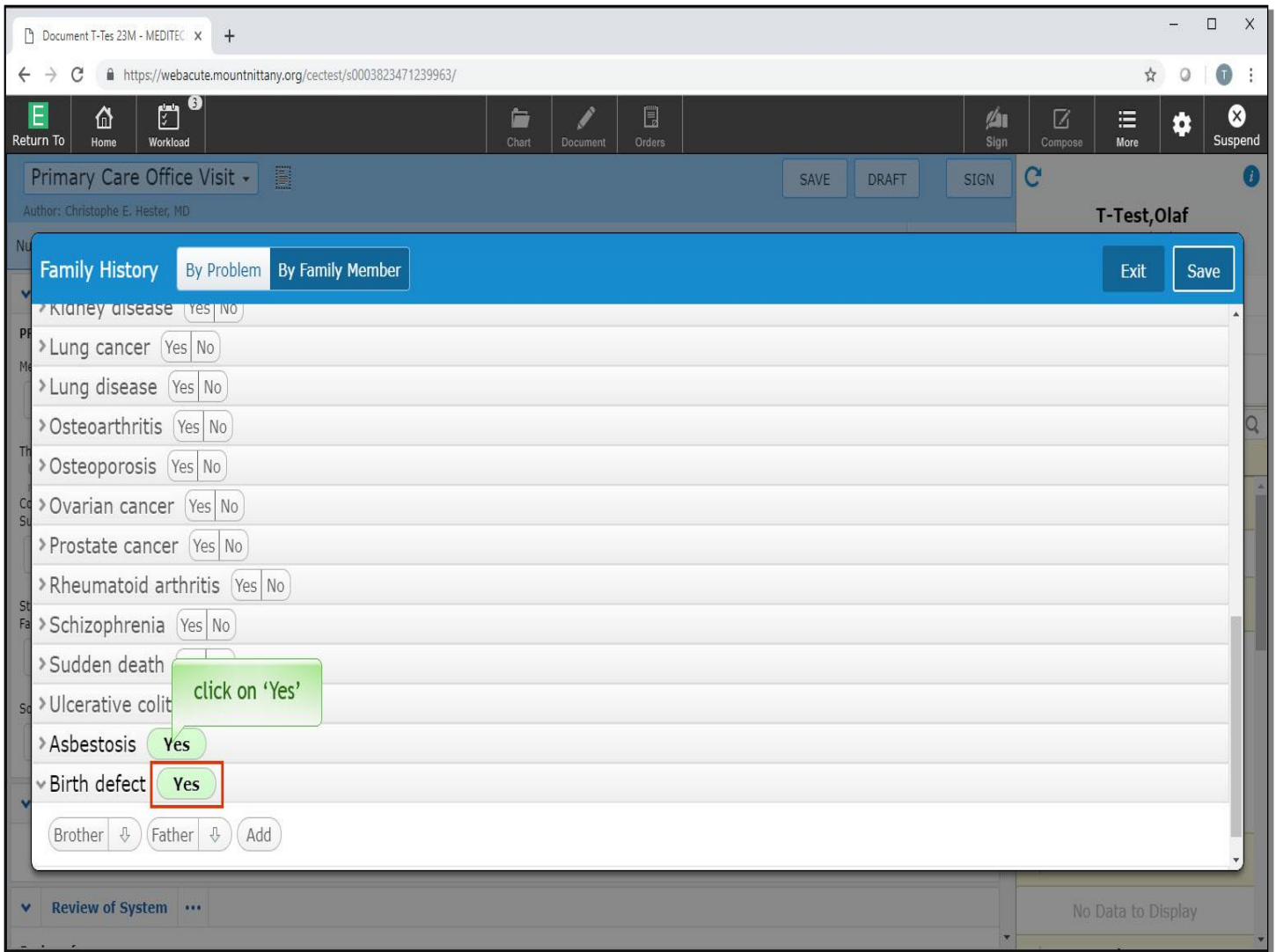The cursor goes straight to the 'Add New Problem' look up field. We'll type in 'birth defects' for you.

For this patient, we wish to indicate NO family history of birth defect. Click on 'Birth Defect' to add it to the list.

Expanse assumes you've added this because of a positive history. It is certainly possible, using this method, to indicate there is a family history of a particular condition without specifying who in the family was afflicted by this condition, but it is also possible to change the 'Yes' to a 'No'. Click on 'Yes'.

'Yes' has been de-selected. Now, click on 'No'.

To save your family history as you've entered it. Click the 'Save' button.

The default view displays family history by family member. To view By Problem, click the 'View By Problem' button.

The display of this information is entirely the option of the provider filling in the note. This information, once entered, will be available for future visits and can be edited and updated as needed. The last part of the PFSH is the Social History section. Click on the 'Launch Overlay' icon for Social History to see what is here.

The Social History has numerous options. Some, like the Preferred Language, is in the form of a search. Click in the 'Preferred Language' field.

We'll type the letter ' P ' in the field for you.

This field works like a drop down but without the arrow. It will also accept Free Text. For this example, click on 'Pennsylvania Dutch'.

A number of other communication related options are available to you. We'll scroll down for you.

Here you can see point and click options for spiritual, religious, and cultural beliefs. Below this is information on the patient's living situation. Click in the 'Marital Status' field.

This field works like the 'Language' field. It works as a look up but can also accept Free Text. We'll type in a letter ' C ' for you.

No options display. So, we will type in 'Co-Habitating'.

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Primary Care Office Visit ▾

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T-Test,Olaf
M · 01/01/1996
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Nursing   Quality   PFSH

REG AMB,
PG.BELIM

▾ PFSH ••• Revie

PFSH

Medical History

⬈ Reviewed

Thyroid cyst
U/S 2/19/18 shows 2.3
repeat recommended in
Community acquired pneumc
Surgical History

⬈ Reviewed Last

Status post laparoscopic chol
Family History

⬈ Reviewed Vie

Asbestosis
COPD (chronic obstructive pu
disease)
Colorectal cancer

Patient denies family history
Birth defect
Diabetes
Social History

⬈ Reviewed

Social History   EXIT | SAVE

⌄ Communication

⌄ Spiritual/Religious/Cultural

Beliefs That Will Affect Care

| None | Religious ⇩ | Spiritual ⇩ |

| Cultural ⇩ |

⌄ Living Situation

marital status
Co-Habitating

marital status details

Current Living Situation

we will scroll down

Alone	Spouse	Parent
Family	Boarding Home	Foster Care
Legal Guardian	Nursing Home	Personal Care Facility
Rehab	Significant Other	Homeless
Other

Current Living Situation Comment

5/19

esus Status
No Hx Avail

ies

ONSET

⌄ ● **Vital Signs**

▾ HPT ⊕ HPI

No Data to Display

We will scroll down to the sections below.

One section is occupational status. We will continue to scroll down.

Other elements in the Social History section include Abuse History, Tobacco History, and Alcohol History. We will scroll to the bottom.
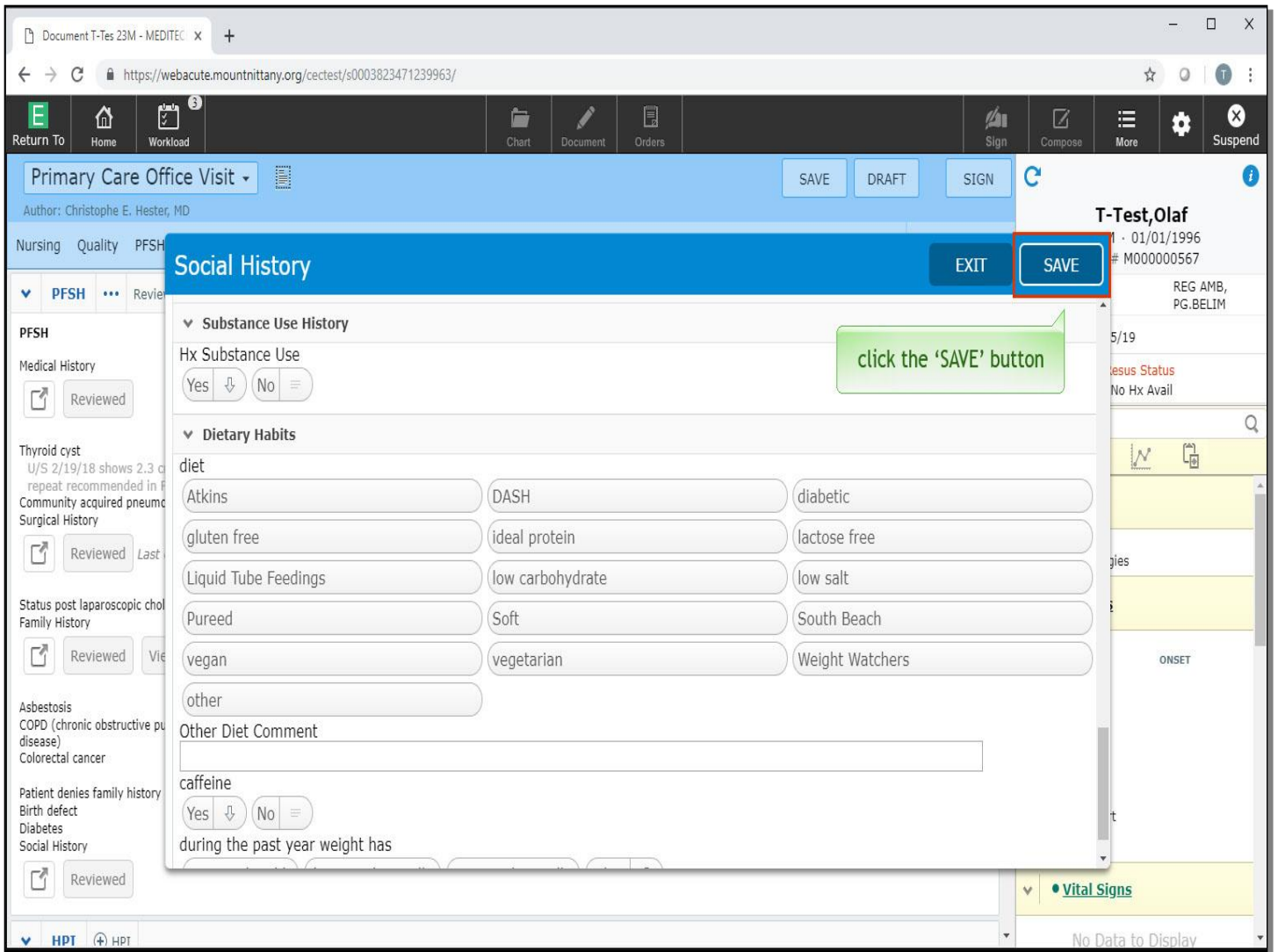
Lastly, Substance Use, Dietary Habits, caffeine and weight status.

All the Social History entries can be carried forward from one visit to the next.

To keep the Social History you have just entered, click the 'Save' button.

Notice the 'Reviewed' button next to each section of PFSH. When you have a visit with a patient and the history requires no changes, you can click the Reviewed button as a way to indicate you have reviewed this information. Click the 'Reviewed' button for Medical History.

You'll see that the button disappears and the date and time the data was Reviewed is recorded. It does not clutter the finished note but the action is captured and reportable.

This concludes the lesson on Past Medical, Family, and Social History.

In this course we learned how to:

- Open a pop up to get into the editing screens for medical and surgical history

- Add problems to the medical and surgical history

- Add a comment which will stay with the problem for future reference

- Indicate that a problem should display on BOTH the past medical and problem list

- Add family history items using two methods on input

- Indicate that there is NO family history of a particular condition

- Open and make edits to the social history

MEDITECH best practice guidelines have been integrated into this lesson.

Please refer to your facility-specific workflows for process questions not covered in this course.

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