From the Office of Health Informatics

Quick Reference Guide (QRG)
Document Histories

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This Quick Reference Guide (QRG) demonstrates the workflow for documenting histories.

Common Buttons & Icons

	Binoculars icon
	Modify icon
	Comments icon
	Add icon
	Quicklist Search icon
...	Ellipsis

Add a Family Member

➢ **From the Workflow menu:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Family** tab below the Histories header.

STEP 3: Click the **Add Family Member** dropdown arrow.

STEP 4: Click the desired family member type to add.

STEP 5: Click the field to document information as needed in the Update Family Member window.

STEP 6: Click OK.

Document Family History

➢ **From the Workflow menu:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Family** tab below the Histories header.

STEP 3: Click the **Histories** header.

STEP 4: Click the **Family Add** icon.

STEP 5: Locate the cell for the condition along the side and the appropriate family member along the top.

STEP 6: Click the gray color to note the family member is positive for the condition.

NOTE: **Clicking the white cell will note that the family member is negative for the condition.**

STEP 7: Double-click the + icon.

STEP 8: Use available fields to document the condition details.

STEP 9: Click OK.

Use Quicklist to Document Family History

➢ **From the Workflow menu:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Family** tab below the Histories header.

STEP 3: Click the **Histories** header.

STEP 4: Click the **Family Add** icon.

STEP 5: Click the **Quicklist Search** icon.

STEP 6: Click the **Search** tab.

NOTE: **The Current Conditions list can also be used. Double-click to select the wanted condition.**

STEP 7: Click the **Search** field.

STEP 8: Type the name of the condition.

STEP 9: Set search parameters.

STEP 10: Press the **Enter** key.

STEP 11: Double-click the desired condition to add.

STEP 12: Click **OK**.

STEP 13: Click the needed cell to document the family history for the condition just added.

Modify Family History

➢ **From the Histories Family tab:**

STEP 1: Use the **Display** dropdown arrow to set what information is included in the list of documented conditions.

STEP 2: Right-click the family member under the desired condition to modify.

STEP 3: Click **Modify Family History**.

STEP 4: Double-click the cell to modify.

STEP 5: Use the various fields to modify the documented information.

STEP 6: Click **OK**.

Document a Historical Procedure

- **From the Workflow menu within the patient's chart:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Procedure** tab under the Histories header.

STEP 3: Click the **Histories** header.

STEP 4: Click the **Add** icon in the Procedures pane.

STEP 5: Click the **Procedure Binoculars** icon.

NOTE: **A free text procedure can be documented; it is best practice to use a codified procedure. See the organizations policies and procedures for further information.**

STEP 6: Click the **Search** field.

STEP 7: Type the desired procedure.

STEP 8: Set the search parameters.

STEP 9: Click **Search by Name** or **Search by Code**.

STEP 10: Navigate to the procedure needed.

STEP 11: Click the procedure.

STEP 12: Click **OK**.

STEP 13: Document the procedure details using the available fields.

NOTE: **Use the Location Binoculars icon to search for an internal location as needed.**

STEP 14: Click **OK**.

STEP 15: Click **Mark all as Reviewed**, as appropriate.

Document Social History

- **From the Workflow menu within the patient's chart:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Social** tab under the Histories header.

STEP 3: Click the **Histories** header.

STEP 4: Click the **Add** icon in the Social pane.

STEP 5: Document the needed sections using the dropdown arrow options, select the appropriate checkboxes, and click the free text fields to add comments.

NOTE: **It is best practice to document as much detail is available. See the organization's policies and procedures for more information.**

STEP 6: Click the – icon to collapse a section.

STEP 7: Click the + icon to expand a section.

Modify Social History Information

- **From the Workflow menu within the patient's chart:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Social** tab under the Histories header.

STEP 3: Click the **Histories** header.

STEP 4: Click the **Display** dropdown arrow.

STEP 5: Click the **Active** option.

STEP 6: Locate the detail that needs to be modified.

STEP 7: Right-click the desired detail to modify.

NOTE: **The right-click menu can be used to add, remove, and view the selected detail.**

STEP 8: Click **Modify**.

STEP 9: Make the needed modifications.

STEP 10: Click **OK**.

Document an Implant

- **From the Workflow menu within the patient's chart:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Histories** header.

STEP 3: Click the **Implants** tab.

STEP 4: Click the Implants **Add** icon.

STEP 5: Click the **Implant description** field.

NOTE: **The Free Text checkbox is selected by default.**

STEP 6: Type the implant description.

STEP 7: Document additional details as they are available. It is best practice to only document fields that information has been provided.

NOTE: If the implant has been removed, click the This was Explanted checkbox.

STEP 8: Select if the **Implant Type**.

STEP 9: Scroll down to the bottom.

STEP 10: Click **OK**.

Document an Implant Using Search

- **From the Workflow menu within the patient's chart:**

STEP 1: Click **Histories** in the Table of Contents.

STEP 2: Click the **Histories** Header.

STEP 3: Click the **Implant** tab.

STEP 4: Click the Implants **Add** icon.

STEP 5: Click the **Free Text** checkbox to unselect.

STEP 6: Click the **ellipsis**.

STEP 7: Set search filters within the Find: All Items window based on known information.

STEP 8: Click the **Find Now** button to run the search.

STEP 9: Click the item from the bottom of the search window that matches the need to select it.

NOTE: If only one item returns in the search it will be selected by default.

STEP 10: Click **OK**.

STEP 11: Continue documenting known information for the implant using the dropdown and free text fields.

STEP 12: Click **OK**.

STEP 13: Click **Mark all as Reviewed**, as appropriate.