

Making the Most Out of Patient History

(1 hour)

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Description

An accurate and complete case history is a crucial aspect in the care of your patient. The case history tells you why the patient is there, directs the course of the exam and many times gives the doctor the key to the puzzle in diagnosing and management. The optometric assistant plays a crucial role in being able to obtain a detailed case history without slowing down patient flow. This interactive presentation will review the key components of a complete case history and some “tricks of the trade” on how to make it efficient and comprehensive.

Learning Objectives:

- List and explain the key elements of a case history
- Understand the importance of a complete medical history
- Identify the common patient ocular and medical conditions

Outline:

Patient History (10 minutes)

- Patient history is the first and many times the most important aspect of the optometric exam
 - allows for an “organized discussion” with the patient
 - informs the clinician why the patient sought professional care
 - directs the clinician in prioritizing the exam
- 3 essential questions that must be answered:
 - 1. Does the patient have a problem?
 - 2. What is the specific problem?
 - 3. What is or will be the effect of the problem on the patient’s performance or physical status?
- 3 maxims must be heeded:
 - 1. The history never ends
 - 2. The history should be complete
 - 3. Listen carefully to the patient

Important Information to Illicit: (5 minutes)

- Basic Demographic Data
 - Date
 - Time
 - Age
 - Sex/gender
 - Race
 - Occupation
 - Avocational needs
 - Referral?
 - Source of history
 - Patient
 - Family
 - Past medical record
 - Reliability of data source?

Case History: Elements **(15 minutes)**

- A comprehensive case history contains the following elements:
 - 1. Chief complaint
 - 2. Patient's medical history
 - 3. Medications and allergies
 - 4. Visual and ocular history
 - 5. Family eye and medical history
 - 6. Vocational or recreational visual needs
- Case History: Psychosocial **(5 minutes)**
 - Psychosocial History:
 - Alcohol?
 - Smoking?
 - Recreational drug use?
 - STD's?

Mini-Mental **(5 minutes)**

- It is important to assess a patients "mental status" and document that.
 - Asking questions during case history
 - such as a patients address, their age, and even the date
 - can give you a patients "orientation to date and place"
 - Assessing a patients general appearance
 - can often give an indication of mental status

The Atypical Patient **(10 minutes)**

- What is an atypical patient?
 - Special populations
 - mentally challenged
 - physically challenged

- Trauma patients with resulting impaired vision
- Elderly patients with reduced vision
- Emergent patients

Q&A / Discussion (10 minutes)