CASE HISTORY ESSENTIALS

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RECOMMENDED READING:
ETTINGER, ER. PROFESSIONAL COMMUNICATIONS IN EYE CARE. 1ST ED. BUTTERWORTH-HEINEMANN: 1994.

DEFINITION:
A RECORD OF A PERSON’S BACKGROUND OR MEDICAL HISTORY KEPT BY A DOCTOR OR SOCIAL WORKER.
PURPOSE
ALLOW FOR GATHERING OF INFORMATION IN ORDER TO:
• OPEN COMMUNICATION BETWEEN DOCTOR AND PATIENT
• ASSIST IN FINDING A DIFFERENTIAL DIAGNOSIS
• ELICIT A CHIEF COMPLAINT

GOALS
BY THE END OF YOUR CASE HISTORY, YOU SHOULD HAVE:
IDENTIFIED THE CHIEF COMPLAINT (CC)
ANY SECONDARY COMPLAINTS (2° C) & CORRESPONDING HISTORY OF PRESENT ILLNESS (HPI)
DEVELOPED A PLAN FOR THE EXAM THAT WILL FOLLOW

GOALS
IS CC POTENTIALLY REFRACTIVE OR MEDICAL?
• BILLING/INSURANCE
• BIG CATEGORIES:
  – Refractive
  – Binocular vision
  – Ocular health
GOALS

USE OPEN-ENDED VS. CLOSED-ENDED QUESTIONING

HISTORY:
EVERYTHING THAT IS DISCUSSED SHOULD BE DOCUMENTED.

CONVENTIONS IN RECORDING
**POSITIVE (+) AND NEGATIVE (-)**

- **POSITIVE = ONGOING DISEASE STATE**
- **NOT USED FOR AN EVENT THAT WAS ISOLATED IN THE PAST OR FOR SURGICAL PROCEDURES**
- **EXAMPLES:** (+) DIABETES
  (+) HYPERTENSION

**HISTORY OF (H/O)**

- **POSITIVE HISTORY OF A DISEASE OR INJURY THAT OCCURRED IN THE PAST**
- **NOT USED WITH ONGOING DISEASE OR SURGERY**
- **EXAMPLES:**
  H/O BLACK EYE OS WITHOUT LASTING SEQUELAE
  H/O MULTIPLE EPISODES OF "PINK EYE" AS A CHILD

**STATUS POST (S/P)**

- **USED AFTER A SURGERY OR MEDICAL PROCEDURE HAS OCCURRED**
- **NOT USED WITH ONGOING DISEASE OR PREVIOUS TRAUMA**
- **EXAMPLE:**
  S/P CATARACT SURGERY OD X 2004
BEFORE THE CASE HISTORY

GREETING THE PATIENT

- AIDS IN ESTABLISHING THE RELATIONSHIP
- PUTS PATIENT AT EASE
- SENSE MOOD/AFFECT/ORIENTATION

OBSERVATION

- ACTIVELY OBSERVE YOUR PATIENT'S BEHAVIOR
- WALK TO THE EXAM ROOM
  - Low vision
  - Driving
  - Blindness
AFFECT/ORIENTATION

- NEUROLOGICAL STATE ASSESSMENT
- AFFECT: EMOTIONS OR MOOD AS EVIDENCED BY BEHAVIOR
- ORIENTATION: A PATIENT’S UNDERSTANDING OF PERSON, PLACE, AND TIME
- EXAMPLES: “DEPRESSED MOOD” OR “AGITATED STATE”
- ENSURE APPROPRIATE CARE OR MAKE A REFERRAL

COMPONENTS OF THE CASE HISTORY

SOCIAL HISTORY

- DEMOGRAPHICS AND IDENTIFYING INFORMATION
- VISUAL DEMANDS
- LIFESTYLE
- LEGAL
- HEALTH BELIEFS, ATTITUDES, AND EXPECTATIONS
- REFUSAL FORM – EXPLAIN RISKS OF DECISION AT EACH VISIT
REASON FOR VISIT

- The patient's reason for coming to an exam may be different than the doctor's.
- The chief complaint/reason for visit should be recorded briefly, often in patient's own words.
- Examples: "red eye," "itchy eyes" "double vision," or "blurry vision."

HISTORY OF PRESENT ILLNESS (HPI)

- Details the chief complaint and any additional concerns or symptoms.
- Should be recorded in medical terminology.
- Clear, complete, and concise.
### USING "FOLDARQ" FOR HPI

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#### FREQUENCY

- Refers to how often a symptom occurs: constant or intermittent?
- If intermittent, how many times a day?
ONSET
• Refers to when the symptoms first started affecting the patient
• Whether the symptoms began gradually or suddenly
• At what point during the day does the symptom occur

LOCATION
• Where the symptom is localized
• If a headache or eye pain, localize more specifically

DURATION
• Applicable to symptoms that are intermittent for “frequency”
• How long symptoms last when they occur – hours, minutes, days
ASSOCIATED FACTORS

- ASSOCIATIONS/MODIFYING FACTORS
- ANYTHING THAT OCCURS CONCURRENTLY WITH THE SYMPTOM OR COMPLAINT
- WITH OR WITHOUT CORRECTION? BETTER WITH GLASSES OR CLS?
- ACTIVITIES OR SPECIFIC VISUAL TASKS ASSOCIATED WITH THE SYMPTOM?

RELIEF

- ANYTHING THE PATIENT DOES TO IMPROVE OR RELIEVE THE SYMPTOMS (MEDS, REST)

QUALITY

- DESCRIPTION AND QUANTIFICATION OF THE SYMPTOM
- SCALES: 1-10 SCALE OR MILD-MODERATE-SEVERE SCALE
CAN YOU FOLDARQ?

CC: “MY EYE IS RED”

PATIENT OCULAR HISTORY
REFRACTIVE HISTORY

• CURRENT USE OF SPECTACLES OR CLS
• HISTORY OF SPECTACLE OR CL WEAR
• AGE WHEN FIRST PRESCRIBED CORRECTION
• AGE OF CURRENT MODE OF CORRECTION
• CHARACTERISTICS OF USE: DISTANCE AND/OR NEAR, CONSTANT OR OCCASIONAL
• LIMITATIONS, IF ANY, ON VISUAL TASKS WITH CURRENT CORRECTION
• EFFECT ON DAILY LIFE

CONTACT LENS HISTORY

• TYPE, BRAND, REPLACEMENT SCHEDULE
• SLEEPING IN LENSES?
• AGE OF CURRENT PAIR
• AVERAGE WEARING TIME, WEAR TIME TODAY
• SOLUTIONS, DROPS, AND CARE PRODUCTS USED
• HISTORY OF INFECTION OR COMPLICATION

PATIENT EYE HEALTH

• LAST EYE EXAM, INCLUDING DOCTOR (IF KNOWN) AND ANY PERTINENT FINDINGS
• PREVIOUSLY DIAGNOSED EYE DISEASE
• CURRENT KNOWN OCULAR CONDITIONS
• PRIOR OCULAR SURGERY OR OTHER TREATMENT
• PRIOR TRAUMA
• TREATMENT OF ANY PRIOR OCULAR PROBLEMS INCLUDING CURRENT SEQUELAE SCHEDULE, LENGTH OF TREATMENT, COMPLIANCE, INDICATION
PATIENT MEDICAL HISTORY

• ANY PAST OR CURRENT ILLNESS OR DISEASE
• CURRENT CARE REGIMEN AND CURRENT STATE OF CONTROL (MEDS, ETC)
• NAME OF PRIMARY CARE DOCTOR / LAST VISIT / INTERVAL BETWEEN VISITS / NEXT PLANNED VISIT

SYSTEMIC HEALTH HISTORY

• ANY PAST OR CURRENT ILLNESS OR DISEASE
• CURRENT CARE REGIMEN AND CURRENT STATE OF CONTROL (MEDS, ETC)
• NAME OF PRIMARY CARE DOCTOR / LAST VISIT / INTERVAL BETWEEN VISITS / NEXT PLANNED VISIT

TRAUMA

• PAST OR CURRENT
• NATURE, SEVERITY, TREATMENT, AFTER-EFFECTS
ALLERGIES

- NKDA = NO KNOWN DRUG ALLERGIES
- NKMA = NO KNOWN MEDICAL ALLERGIES, INCLUDING ANY ADVERSE REACTION AND ITS SEVERITY

REVIEW OF SYSTEMS (ROS)

A COMPREHENSIVE REVIEW OF SYSTEMS (ROS) INCLUDES 13 AREAS:
- GENERAL, HEAD AND NECK, EYES/EARS, NOSE/THROAT/SINUS/MOUTH, MUSCULOSKELETAL SYSTEM, RESPIRATORY/PULMONARY, CARDIOVASCULAR, GASTROINTESTINAL, REPRODUCTIVE/GENITOURINARY, HEMATOLOGICAL, NEUROLOGICAL, ENDOCRINE, PSYCHIATRIC
FAMILY MEDICAL HISTORY

FMHX
- EXPLORE PERTINENT DISEASE IN A FAMILY
- EXAMPLES: DIABETES, HIGH BLOOD PRESSURE, HEART DISEASE, THYROID ISSUES, SICKLE CELL

FAMILY OCULAR HISTORY
FOHX

- Explore pertinent ocular disease in a family
- Presence or absence of glaucoma, strabismus ("eye turn"), amblyopia ("lazy eye"), ARMD, RP, color vision disorders, retinal problems, and/or blindness

- Record who in the family had the disease
- Which side of the family it occurred on
- Examples: MGF = Maternal Grandfather
  PGM = Paternal Grandmother

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**CHIEF COMPLAINT?**

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REFRACTIVE?
BINOCULAR/ACCOMMODATIVE?
OCULAR HEALTH?

POTENTIAL DIAGNOSIS?

FOLDARQ
REFRACTIVE?
BINOCULAR/ACCOMMODATIVE?
OCULAR HEALTH?

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