User's Guide

Medical Tab and History Updates

Medical information at your fingertips from anywhere in the Patient screen

Video - Medical Tab and History Upgrade (requires portal Login)
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# MEDICAL TAB

The Medical tab is designed to facilitate fast access to a patient's medical history.

## Overview
- **Purpose** (see "Purpose of the Medical tab" on page 6)
- **Benefits** (see "Medical tab Benefits" on page 7)
- **Primary Features** (see "Medical tab Primary Features" on page 8)
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## Using
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- **Video - Medical Tab and History Upgrade** (requires portal Login)

Online version of this user guide
Overview of the Medical tab

This Overview section includes introductory information for those new to the Medical tab, including its purpose (see "Purpose of the Medical tab" on page 6), benefits (see "Medical tab Benefits" on page 7), primary features (see "Medical tab Primary Features" on page 8) and requirements for use (see "Medical tab Requirements" on page 9).

Purpose of the Medical tab

The Patient File Medical tab is designed to

- Promote a standardised workflow for patient medical activities.
- Provide exceptionally quick access to patient medical records.
- Provide strong auditing of historical data.

From this tab users can both display and record the patient’s medical details.
**Medical tab Benefits**

Primary benefits include:

**Users have immediate access to information**

The interface has a flattened architecture, providing immediate access to medical information without users having to navigate through multiple menus or screens.

Detailed popup tooltips facilitate this quick access to information.

The primary immediate-access tool is the Medical History Tooltip, available as an instant display from any tab in the interface:

![Medical History Tooltip](image)

**Users instantly notice the primary medical indicators**

Medically significant indicators are specially highlighted and immediately noticeable. For example:

![Medical Status Icon](image)

The medical status icon changes colour and even flashes. Statuses include Alert and Infectious.

**Medical Record Out of Date: 30/10/2006** Status of the Medical Record is clearly indicated.

**Primary medical information is visible from anywhere in the interface**

The most important medical information has been migrated out of the medical interface into the toolbar, so that it is visible from anywhere in the EXACT interface:

From any tab in the interface, hover your mouse cursor over the medical icon in the button bar:

![Tooltip Display](image)

... a tooltip shows the patient's current medical status, medical history, and the most recent notes entered.

**Medical history screens can be customised to suit local requirements**

- Users have the flexibility to create their own medical data entry screens.
- It is possible to search for patients with particular conditions through the contact list queries.
- It is possible to import medical history forms without having to install new software versions.
With a full audit trail it is possible to track changes to the medical records of each patient

The records of each patient display multiple fields, including the Provider who initiated each change. By activating an Audit trail you can also toggle a display of the **voided** items in italic type. For example:

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>User</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>22/05/2012</td>
<td>Notes</td>
<td>DEMO</td>
<td>Pills</td>
</tr>
<tr>
<td>16/05/2012</td>
<td>Med History</td>
<td>DEMO</td>
<td>Heart ✓ RI</td>
</tr>
<tr>
<td></td>
<td>Medical</td>
<td>DEMO</td>
<td>Other ✓ Di</td>
</tr>
<tr>
<td>16/05/2012</td>
<td>Infectious</td>
<td>DEMO</td>
<td>Infectious set</td>
</tr>
<tr>
<td>16/05/2012</td>
<td>Notes</td>
<td>DEMO</td>
<td>Test Quick No</td>
</tr>
<tr>
<td>16/05/2012</td>
<td>Med History</td>
<td>DEMO</td>
<td>Heart ✓ RI</td>
</tr>
<tr>
<td>09/05/2012</td>
<td>Notes</td>
<td>DEMO</td>
<td>Allergy to Peni</td>
</tr>
</tbody>
</table>

**Medical tab Primary Features**

Medical tab primary features include:

- **Automated conversion in the software upgrade**: The software upgrade to version 10.16 automatically transforms existing medical history data into a standard custom screen. Previous medical notes are automatically converted into icon-differentiated format notes with icons.

- **Screens per region**: Custom screens are available for each geographical region, with fields matching those available on the standard medical history forms in those regions.

- **Medical record status bar** (see "Viewing the Medical Record Status" on page 13), with an instantly noticeable coloured status indicator

- **Medical icon** (see "Viewing the Medical Status Icon" on page 11) to clearly show medical status, including
  - Alerts (for issues such as heart problems), and
  - Infectious status (for infections such as hepatitis).

- **Medical History Tooltip** (see "Viewing the Medical History (tooltip)" on page 14) displays when you hover the mouse over the medical icon

- **Medical History List** (see "Viewing and using the Medical History List" on page 17) of changes to Notes, Prescriptions and Medical History.

- An **audit option to re-display records** (see "Showing an Audit Trail of Medical History" on page 19) that were removed from the Medical History List.

- **Update Medical History** (see "Updating patient Medical History" on page 23) button, providing access to quickly-selectable standard options.

- **Add Note** (see "Adding a Medical Note" on page 15) button, for adding notes and pop-up notes to the patient record. The **note type** is differentiated by icon: 📔 📔 📔 📔 📔 📔 📔 📔 📔.

- The Medical tab includes a footer section with the means to view and directly edit patient preferences such as:
  - **Default doctor** (see "Changing default Doctor or adding New Doctor" on page 27). From here you can change default doctor or add new doctors.
  - **Next of Kin** (see "Specifying patient Next Of Kin" on page 28)
  - **Anaesthetic preference** (see "View/set patient Anaesthetic Preference" on page 29)
Medical Tab Requirements

Enhanced functionality is only available from EXACT version 10.16.

An upgrade to version 10.16 includes automated mapping of previous to new functions. For example:

- All existing entries from the Medication notes are moved to Notes (with medication symbol).
- Medical Notes are moved to Notes (with a clipboard symbol).
- The Medical History Text Field is moved to a Note (with a clipboard symbol).
- The Infectious text field is moved to a note with yellow cross.
- Medical History Questionnaires will be shown summarized, with a red cross next to them.
- Prescriptions will be shown with a pill bottle icon next to them.
Using the Medical tab

This section includes the activities most users will perform in the Medical tab.

The Medical Tab screen layout

1. **EXACT Menus**
2. The Workspace Bar This is customisable, and you can Hide/Show it
3. The patient toolbar, with functions that are independent of tabs
4. **Tabs**
5. **Medical Record Status** (see "Viewing the Medical Record Status" on page 13), showing clearly if the patient records are in-date or not
6. **Update patient Medical History** (see "Updating patient Medical History" on page 23)
7. **Add a Medical Note** (see "Adding a Medical Note" on page 15)
8. **Medical History List** (see "Viewing and using the Medical History List" on page 17)
9. **Show an Audit Trail of voided Medical History items** (see "Showing an Audit Trail of Medical History" on page 19)
10. **Change default doctor or add a new doctor** (see "Changing default Doctor or adding New Doctor" on page 27) for patient
11. **Configure the Medical History** (see "Configuring Medical History" on page 30) (requires permission to the Configure-Patient File screen)
12. **View details** (see "Viewing full details of a list item" on page 20) of the highlighted list item, or edit it.
13. **Specify patient Next Of Kin** (see "Specifying patient Next Of Kin" on page 28)
14. **View patient Anaesthetic Preference** (see "View/set patient Anaesthetic Preference" on page 29)
15. Define the **Medical Status Icon** (see "Viewing the Medical Status Icon" on page 11) (appears in the patient toolbar above).

Note: Hover the mouse cursor over this icon to see the Medical History (tooltip) (see "Viewing the Medical History (tooltip)" on page 14)
Viewing the Medical Status Icon

Purpose of the Medical Status Icon:

Instantly view MEDICAL STATUS from any tab:

The medical status icon is accessible from all of the tabs in the Patient file, providing a quick visual indication of the patient's medical condition and the status of their medical record.

Instantly view MEDICAL HISTORY from any tab:

Hover your mouse cursor over the medical icon to display a Medical History (tooltip) (see "Viewing the Medical History (tooltip)" on page 14), showing a summary of the patient’s current medical status, medical history, and the most recent notes entered:

When you move your cursor away, the tooltip disappears. You can also click the icon to open the summary on the screen (you will need to click a Close button to close it).

The Medical Status icon can be activated or changed (see "Activate / change the Medical Status icon" on page 12) from the bottom right of the Medical tab screen.

Icon states:

- There is no medical history information recorded for this patient.
- The medical history is up to date, and there are no alerts (for infectious diseases or medical conditions).
- Medical history up to date, infectious alert.
- Medical history up to date, medical condition alert.
- Flashing between Yellow and Red indicates that both Infectious and Alert have been set.
- Any of the three statuses can also have a note icon attached, which shows the record needs updating. This can be because the medical notes are more than the set number of months overdue, or because someone has ticked the Update Medical History at next opportunity checkbox at the top of the screen.
Activate / change the Medical Status icon

The medical Status icon is an important feature of the EXACT interface, providing instant medical status information, and functioning as a launch point for the Medical History (Tooltip) (see "Viewing the Medical Status Icon" on page 11).

(see Viewing the Medical Status Icon (on page 11))

To activate or change the medical status icon

Open the Medical tab and click the appropriate icon(s) at the bottom right of the screen:

The yellow and red icons can both be active at once, and the user settings configured to alternately flash each one, so that you are aware both conditions apply.

All changes are audited.

Each time that you change this field, the change is written to the medical history list in the form of "Alert set to on" or "Infectious set to off".

The entry is automatically marked as void, so it only shows in the Medical History List (see "Viewing and using the Medical History List" on page 17) when you tick the Show Audit check box (see "Showing an Audit Trail of Medical History" on page 19).

To activate / de-activate the flashing of the Medical Status Icon

The flashing property of this icon can be activated or de-activated per EXACT system user.

1. Select Configure > User settings...

2. From the user Settings screen, under the Patient File area, select or de-select the Med Alert Flashing field:

3. Re-start EXACT for the settings to take effect.
Viewing the Medical Record Status

What is the Medical Record Status?

Medical records need to be kept up to date. The Medical Record Status is a highly visible indication of how in-date a patient's medical record is. It indicates whether the record is in date, needs to be updated, or has not yet been created.

Location

The current status of the patient's medical record, (with the date it was last updated), displays at the top-left of the Medical tab (on page 5) screen, colour-coded for easy visual identification:

![Medical record status screenshot](image)

**Statuses**

- **Medical Record Last Checked: 16/11/2011**
  Records are up-to-date.

- **Medical Record Out of Date: 30/10/2006**
  Records are older than the specified age, or the Update Medical History at next opportunity checkbox next to it is ticked (you can place a tick in this checkbox to force an update of the patient’s medical record).

- **Medical Record not Initialised.**
  Medical details have never been entered (this status may also appear as a blank yellow bar).
Prompt to Update Medical History at next opportunity

You can optionally prompt an update of the medical history form for a patient:

Select (check) this check box to inform the system that the medical history form is out of date (even if it isn't), or the system has no limit set for updating medical histories.

The system will automatically uncheck this checkbox when the medical history is updated.

How do you update the Medical Record?

(See Update / edit the medical history (see "Updating patient Medical History" on page 23))

Either

- Click the Update Medical History button at the top of the Medical tab, or
- Hover the mouse cursor over the medical icon (see "Viewing the Medical Status Icon" on page 11) then click the Update Medical History button there.

Viewing the Medical History (tooltip)

To temporarily display a summary of the Medical History

From any tab in the interface, hover your mouse cursor over the medical icon in the button bar:

... a tooltip shows the patient's current medical status, medical history, and the most recent notes entered >

The tooltip will continue to display as long as the mouse cursor remains over the icon or the tooltip itself.
The tooltip display depends on what medical history has been configured (the top area), and what notes have been created for this patient (the area below the line).

**Scanned History will display in the top of the Medical History tooltip**

If a scanned medical history is the most recent then it displays in the tooltip as the top three quarters of the tooltip, with the notes displaying underneath. If the image is too big, use the scroll bar to scroll to other pages. The notes section and scan document can be scrolled independently. Open the scanned document by double clicking anywhere on it. This will launch the standard windows program for that file type which should let you zoom and print the document as required.

**Actions that you can perform in the Medical History tooltip:**

**To update /Edit the Medical History configuration:**

Click the **Update Medical History** button to open the *Update patient medical history dialog* (see "Updating patient Medical History" on page 23), where you can specify the custom screen used for the medical questionnaire, and customise other settings.

**To add a Note or a pop-up note for this patient:**

Click the **Add Note** button and complete the *Add Note dialog* (see "Adding a Medical Note" on page 15). You can also add a pop-up note so that when you open this patient’s records a note will appear automatically on the screen. See the Popup Notes topic.

**To OPEN a summary of the Medical History**

Click the medical icon in the button bar.

Although the same information is displayed, the tooltip now has a **Close** button, and will continue to be displayed until this button is clicked, or click the **Update Medical History** button to edit the medical history, or the **Add Note** button to add a note.

**Note:** The **Update Medical History** button and **Add Note** button are also available on the Medical tab itself.

**Adding a Medical Note**

The Notes feature enables you to add various notes to a patient’s file to record information, and as reminders to yourself or other staff of important information. Notes can be configured to pop up under specified circumstances.

See also the "Popup Notes" topic.

**To add a medical Note**

1. Access the Add Notes window by any of these means:
   - From anywhere the **Add Note** button is available (is in the menu bar above the tabs), or
   - Click the **Add Note** button on the Medical tab (on page 5) or on the Medical History Tooltip (see "Viewing the Medical History (tooltip)" on page 14), or
Add a Note by means of the Notes tab.

Fields / Features:

Entry Date  
This defaults to today's date when you open the dialog.

Entry Time  
This defaults to the time the 'Add Notes' dialog was first accessed.

Entered By  
This defaults to the name of the currently logged-in user.

Pop-up Note  
Click this checkbox box if the note is to be a pop-up note. This will cause the note to be displayed whenever the patient's record is accessed in EXACT. When 'Pop-up Note' is selected, the pop-up options below become active.

(See also To Create a Pop Up Note)

Colour  
Applies to pop-up notes, and allows you to select a background colour for the note from the drop-down menu.

Pop-up Options  
Click this button to view and select the options governing the pop-up note's behaviour - when it is to be displayed (based on which trigger/s), and for which EXACT users.

Notes  
You can choose a note type by clicking on the appropriate icon above the entry box:

- General note
- Note about a prescription
- Referral letter to/from a specialist
- Notes to/from a doctor
- Notes related to an examination
- Notes regarding patient’s hospitalisation
- Notes regarding infectious or medical conditions

Click a pre-set Quick Note template name in the list at the right, then click the 'Move Left' button to add the note text to the text box. You can then edit the text as required. A highlighted pre-set note can be edited using the button, or deleted from the list using the button. A new note can be created using the button.

When you have finished with the 'Add Note' dialog, click the button to save any changes made, or the button to exit from the dialog without saving any changes.
Viewing and using the Medical History List

The list of medical details and notes (see "Adding a Medical Note" on page 15) is in the main part of the Medical tab (on page 5) screen, arranged by date:

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>User</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>16/05/2012</td>
<td>Notes</td>
<td>DEMO</td>
<td>Patient may have visited local opposition dentist</td>
</tr>
<tr>
<td>16/05/2012</td>
<td>Med History</td>
<td>DEMO</td>
<td>Heart, Rheumatic Fever, High Blood Pressure, Heart Surgery, Angina</td>
</tr>
<tr>
<td>00/05/2012</td>
<td>Notes</td>
<td>DEMO</td>
<td>Allergy to Penicillin</td>
</tr>
</tbody>
</table>
| 22/07/1999 | Prescription | DEMO | AUGMENTIN 500 tab, SEND: 9, LABEL: Take 2 tabs to start, then 1 every 12 hours until limits end. 
                 |           | DIFFLAM 15% oint. SEND: 200ml, LABEL: Rinse 10ml for 30 seconds every 2 hours. 
                 |           | PANADEINE (6mg codeine, 300mg paracetamol), SEND: 30, LABEL: Take 1 or 2 tabs every 6 hours. Panadeine tabs, 40 tabs Panadeine 500mg, 2 tabs 4 hourly for pain |

☐ Show Audit

Doctor: DOCTOR001
Dr Suki

Next of Kin: Patient: Non-patient

Ana. Prof

Drilux

☐ Alert

☐ Infection

☐ Infecious

Medical Tab and History Updates, EXACT v10.16 rev 2, 25 February 2013
List contents

The list contains the patient medical history and notes, including

- Medical History Questionnaires
- Medical History Scanned Forms
- Notes
- Prescriptions

The Type column has a graphic and label to show what medical details were entered on that date:

- The medical history was updated
- General note
- Note about a prescription
- Referral letter to/from a specialist
- Notes to/from a doctor
- Notes related to an examination
- Notes regarding patient's hospitalisation
- Notes regarding infectious or medical conditions

Actions that you can perform in the Medical History List:

To Sort the list

The list is only sorted by Date, by default with the most recent at the top.

Optionally click the Date column header to toggle the sort order:

- Most recent record at the top.
- Oldest record at the top.

To Add a Note or a pop-up note for this patient:

Click the Add Note button and complete the Add Note dialog (see "Adding a Medical Note" on page 15).

You can also add a pop-up note so that when you open this patient's records a note will appear automatically on the screen. See the Popup Notes topic.

To customise the column display:

Click and then hide / show / re-order the display columns (see "Customising the display for the Medical History List" on page 19).

To view the full details of a listed medical history item:

Double-click the listed item, or select / highlight it and then click the button to view all details (see "Viewing full details of a list item" on page 20).

To edit a selected / highlighted list item (apart from a prescription):

Click the button or press CTRL-E.

This will open the record, and after you edit it, it will save under today's date. See Adding a Medical Note (on page 15).
To view the previous (unedited) details, tick the **Show Audit** checkbox. The original record details are distinguished by being shown in italic type.

**To show an Audit trail (history) of items in this list:**

Select **Show Audit**. The *historical details of each item* (see "Showing an Audit Trail of Medical History" on page 19) display in *italic* type. For example:

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>User</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>16/05/2012</td>
<td>Notes</td>
<td>DEMO</td>
<td>Patient may have ...</td>
</tr>
</tbody>
</table>

**To update / edit the Medical History configuration:**

Click the ‘spanner’ button to open the Medical History Configuration dialog, where you can specify the custom screen used for the medical questionnaire, and customise other settings.

### Customising the display for the Medical History List

**To customise the Medical History column display**

2. Click **Column Settings** to display the Column Settings window

3. Follow the instructions in the window and then click **OK**.

**Showing an Audit Trail of Medical History**

To show an Audit trail (history) of voided items in the medical History List

4. Select **Show Audit**.
The historical details of each voided item display in *italic* type. For example:

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>User</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>22/05/12</td>
<td>Notes</td>
<td>DEMO</td>
<td>Pills</td>
</tr>
<tr>
<td>16/05/12</td>
<td>Med History</td>
<td>DEMO</td>
<td>Heart</td>
</tr>
<tr>
<td>16/05/12</td>
<td>Infectious</td>
<td>DEMO</td>
<td>Infectious set</td>
</tr>
<tr>
<td>10/05/12</td>
<td>Notes</td>
<td>DEMO</td>
<td>Patient may have</td>
</tr>
<tr>
<td>10/05/12</td>
<td>Med History</td>
<td>DEMO</td>
<td>Heart</td>
</tr>
<tr>
<td>09/05/12</td>
<td>Notes</td>
<td>DEMO</td>
<td>Allergy to Penicillin</td>
</tr>
</tbody>
</table>

5. To hide the Audit again, de-select **Show Audit**.

### Viewing full details of a list item

*To view the full text of a medical history item*

6. Either double-click the listed item,
   - or -

7. Select it and then click the **i** button.

A read-only pop-up displays full details on that item. For example:
Editing a Medical History List item

Requirements and limitations:

- It is possible to edit all items except prescriptions.

- The edit button is access controlled from the Add/Edit Medical Histories field in Configure > Security:

  ![Medical Tab]
  ![View Medical History Button]
  ![Add/Edit Medical Notes]
  ![Add/Edit Medical Histories]

To edit an item in the Medical History List

8. Select the listed item (except for prescriptions).

9. Click the edit icon and then update the screen that displays (this is the same as that item’s initial creation screen).

   The edit item will be saved with the current date and time, and the current user login.

Viewing FULL or SUMMARISED Medical History

The Medical History Form is often complex and large. To facilitate this form fitting on the screen, by default EXACT displays a summarised version, with just the ticked fields listed.

However, you can optionally change the default value to display the FULL Medical History, as described below.

This setting affects both

...the Medical History Tooltip

(see "Viewing the Medical History (tooltip)" on page 14):

![Medical History Tooltip]

... and the Medical History:

![Medical History]

To toggle between viewing the full Medical History and the summarised version

10. Select Configure > Custom Screens...
11. From the Custom Screens window, either double-click the Medical History, or select it and then click the Edit button:

![Custom Screens window]

12. In the Edit Custom Screen, either select or de-select Do not summarise, depending on which you require:

- Do not summarise
  - This shows the summarised version.
- Do not summarise
  - This shows the full version.

![Edit Custom Screen]

13. Click OK and return to the Main screen.
**Updating patient Medical History**

The system may require you to update the patient’s medical history if you have Prompted to update the Medical History at the next opportunity.

Or you can at any time manually update the patient’s history.

**To update a patient’s Medical History**

14. Click the [Update Medical History] button on either the **Medical tab** (on page 5) or the **Tooltip** (see "Viewing the Medical History (tooltip)" on page 14):

The practice's current medical history custom screen for that patient displays. For example:

<table>
<thead>
<tr>
<th>Medical History (Default)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heart</td>
</tr>
<tr>
<td>- Pneumonia Fever</td>
</tr>
<tr>
<td>- High Blood Pressure</td>
</tr>
<tr>
<td>- Heart Surgery</td>
</tr>
<tr>
<td>- Pacemaker fitted</td>
</tr>
<tr>
<td>- Heart Murmur</td>
</tr>
<tr>
<td>- Angina</td>
</tr>
<tr>
<td>- Thrombosis</td>
</tr>
<tr>
<td>Chest</td>
</tr>
<tr>
<td>- Bronchitis</td>
</tr>
<tr>
<td>- Emphysema</td>
</tr>
<tr>
<td>- Pneumonia</td>
</tr>
<tr>
<td>- Chest Surgery</td>
</tr>
<tr>
<td>- Smoker</td>
</tr>
<tr>
<td>- Cystic Fibrosis</td>
</tr>
<tr>
<td>- Pleurisy</td>
</tr>
<tr>
<td>Blood</td>
</tr>
<tr>
<td>- Bleeding</td>
</tr>
<tr>
<td>- Hepatitis B</td>
</tr>
<tr>
<td>- H.I.V.</td>
</tr>
<tr>
<td>- Anaemia</td>
</tr>
<tr>
<td>- Blood Test</td>
</tr>
<tr>
<td>- Sickle Cell</td>
</tr>
<tr>
<td>- Haemophilia</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>- Serious Childhood Illness</td>
</tr>
<tr>
<td>- Diabetes</td>
</tr>
<tr>
<td>- Liver Disease</td>
</tr>
<tr>
<td>- Kidney Disease</td>
</tr>
<tr>
<td>- Epilepsy</td>
</tr>
<tr>
<td>- Cancer</td>
</tr>
<tr>
<td>- G.A. Experience</td>
</tr>
<tr>
<td>- Hiatus Hernia</td>
</tr>
<tr>
<td>Allergies</td>
</tr>
<tr>
<td>- Penicillin</td>
</tr>
<tr>
<td>- Hay Fever</td>
</tr>
<tr>
<td>- Anti Tetanus Serum</td>
</tr>
<tr>
<td>- Eczema</td>
</tr>
<tr>
<td>- Aspirin</td>
</tr>
<tr>
<td>- Asthmatic</td>
</tr>
<tr>
<td>- Latex Allergy</td>
</tr>
<tr>
<td>Warnings</td>
</tr>
<tr>
<td>- No Local Anaesthetic</td>
</tr>
<tr>
<td>- Anti Biotic Cover</td>
</tr>
<tr>
<td>- Do Not Recline</td>
</tr>
<tr>
<td>- Pregnant</td>
</tr>
<tr>
<td>- Waring Card</td>
</tr>
<tr>
<td>- Artificial Joint</td>
</tr>
<tr>
<td>Special Precautions</td>
</tr>
</tbody>
</table>

This custom screen has been pre-selected from options in the **Medical History Configuration** (see "Configuring Medical History" on page 30) settings.

In most cases, you can update the screen by simply clicking options on-screen. Note that instead of a simple OK button, you are required to confirm changes by means of a dated button:

**Option to update by means of a printed form**

You may wish instead to print out a questionnaire and have the patient fill it out before the appointment, and you can then enter the results into EXACT at a later time.
Printing patient details, with Medical History

When printing out the patients details, you can choose to include the Medical History. This will cause the Medical History section to print as it appears in the Medical History tooltip, showing the current medical history form and all notes.

To print patient details with Medical History

15. Click the Print button from any screens where it is accessible, to display the Print Patient Details print dialog.

16. Select the Print treatment history option.

17. Optionally select the Include chart only items and Include voided items.

18. Select the Print button to print to your default printer.

Further options:

Select the Preview button to view the details rather than printing them. This option is useful to see what each of the report options does to the printed output before you make your final selection and click the 'Print' button.

Select the Export button to export a .CSV file with the patient details (see "Exporting patient details, with Medical History" on page 25).
Exporting patient details, with Medical History

Purpose
This enables a user to export patient details (including medical history) to a .CSV file.

To export patient details and Medical History to a .CSV file

19. Click the Print button from any screens where it is accessible, to display the Print Patient Details print dialog.

20. Select the Print treatment history option.

21. Optionally select the Include chart only items and Include voided items.

22. Select the Export button.

23. Specify a filename and location for the .CSV file, and select the Save button.

24. Follow any prompts that appear.
   The .CSV file will open automatically on creation.

Further options:
Select the Print button to print the selection (see "Printing patient details, with Medical History" on page 24).
Select the Preview button to view the details rather than printing them. This option is useful to see what each of the report options does to the printed output before you make your final selection and click the 'Print' button.
Configuring a printable patient Medical History

You may need to configure a printable version of the questionnaire for a patient to complete, and to allocate time before the patient’s next appointment so that there is time for their history to be updated.

Both of these can be configured from the Medical History Configuration screen, which you access from the Medical tab:

To configure a printable form for the patient’s Medical History:

25. Click the 'spanner' button to open the Medical History Configuration
26. Specify the custom screen used for the medical questionnaire:

27. Choose the Medical Questionnaire required by
   - Entering the appropriate code, or
   - Using the (up/down) buttons, or
   - Click the (List) button to display the available options, select an option, and then click OK:

This questionnaire has been configured from the Patient File Configuration > Custom Medical Questionnaire. If you need to create a new custom screen, or edit an existing one, you can do this (provided you have the appropriate security permissions) via the Configure > Custom Screens menu item.

28. Browse for the Printable Version. This allows you to specify the name of the document template file that can be printed. Enter the name of the template file, or click the button to open the Document Details window to find it or to create a new one.

29. If you wish to have the patient answer a medical questionnaire at their next appointment, you can allow extra time for this prior to their next appointment. To do this, specify how many minutes early they are required to be, in the If MH needed request pt come in x minutes early field.

This extra time consideration propagates through to both SMS and Letter reminders, with a merge field that states “Please arrive XX minutes before your appointment time to update your medical history.”
Changing default Doctor or adding New Doctor

If configured, the patient's default doctor displays at the bottom of the Medical tab screen (see "Medical Tab" on page 5):

To change the default doctor
30. Click in the Doctor text field to display selection controls:

31. Select a doctor by either scrolling the records with the up/down arrows, or clicking the Select a Doctor button and selecting from the View Doctors screen, from which to select a different doctor:

To add a New Doctor
32. Select the View Doctors screen as described above.
33. Click the +1 button to display the Add Doctor dialog:

34. Complete the fields and click OK.
The new Doctor will display in the View Doctors window.

---

**Specifying patient Next Of Kin**

*To specify a non-patient as Next Of Kin*

In the Medical tab, click the Non-patient radio button and then type details in the text box that displays:

*To specify a patient as Next Of Kin*

35. Click the Patient radio button and then *click in the text box* to display the selection controls:

36. Use the (up/down) buttons or use the (List) button to display the View patients window, from where to select the patient’s name:
View/set patient Anaesthetic Preference

If the patient has a particular preference for a specific type of local anaesthetic, view / type it in the Ana. Pref text box at bottom right of the Medical tab screen:

All changes are audited.

Each time that you change this field, the change is written to the medical history list in the form of Date/time, User, and a comment "Ana. Pref changed to xxxx"

The Entry is automatically marked as void, so it **only shows** when you **tick the Show Audit check box** (see "Showing an Audit Trail of Medical History" on page 19).
Configuring the Medical tab

This section includes topics for configuring the Medical Tab and related utilities.

Some configuration requires appropriate security permissions.

## Configuring Medical History

### Purpose:

From the **Medical History Configuration** it is possible to

- Specify the custom screen used for the medical questionnaire (this can also be done from the Configure > Patient File screen).
- Set an alert for overdue medical notes (this can also be done from the Configure > Patient File screen).
- Configure a printable version of the questionnaire.
- Allocate time before the patient's next appointment so that there is time for their history to be updated.

### To edit the Medical History Configuration:

37. From the Medical tab, click the Configure button to open the Medical History Configuration.

   **Note:** Users without permissions to the Configure-Patient File screen will not see this configure icon.

38. Specify the custom screen used for the medical questionnaire (the system comes with a default screen, but this can be customised or you can create new screen options by means of the Configure > Custom Screens menu item):

   ![Medical Questionnaire Configuration](image)

   Choose the Medical Questionnaire required by
   
   o Entering the appropriate code, or
   
   o Using the (up/down) buttons, or
   
   o Click the (List) button to display the available options, select an option, and then click OK:

   ![Custom Screens](image)

   This questionnaire has been configured from the Patient File Configuration > Custom Medical Questionnaire.

   If you need to create a new custom screen, or edit an existing one, you can do this (provided you have the appropriate security permissions) via the Configure > Custom Screens menu item.

39. Complete the remaining fields as follows:
- The Alert if medical notes x months overdue field will cause the Medical Status to display "Medical Record Out of Date", as shown above, once it has been more than that number of months since the medical questionnaire was last updated.

- **Printable Version** allows you to specify the name of the document template file that can be printed if you wish to have the patient fill out a medical questionnaire before their appointment. Enter the name of the template file, or click the [Browse] button to open the Document Details window to find it or to create a new one.

- If you wish to have the patient answer a questionnaire to update their medical history at their next appointment, you can allow extra time for this prior to the appointment. To do this, specify how many minutes early they are required to be, in the **If MH needed request pt come in x minutes early** field. Default is 10 minutes, but the field can accept up to 99 minutes.

---

**Open Medical History on 'Move to Chair'**

**Purpose:**

When a patient moves from reception to the chair in the clinic, it is useful to have the patient’s Medical History open automatically on the clinic screen. Most Providers will particularly want to review this Medical History with **new patients**.

This automated display can be optionally configured from the User Settings window.

If set, this option will cause the medical history tooltip to open in a window when a user selects either of these buttons:

- Patient preview > **Move to chair**.
- Side bar appointment book > **Move to chair**.

**To configure an auto-display of the Medical History on Move To Chair**

40. Select **Configure > User settings** to select the **User Settings window**.

41. Under the Patient File section, select [✓] Automatically open the medical history on 'Move to Chair'.

42. Click the **Save** button at the top of the screen.
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