CHAPTER 8: ENTERING MEDICAL HISTORY

Just below the Patient area of the CID is displayed the most recent medical history of the patient that is currently selected.

In this chapter you will learn how to:

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"Use the Medical History Search Box" on page 3
"Work with the Attachments Window" on page 3
"Use the Enter Medical History Window" on page 3
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"Change Medical History Information" on page 7
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"View and/or Add Medical History Doctor Instructions" on page 8
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Sort Medical History

All Medical History entered for a patient is displayed in the default Chronological view. You may sort your Treatments/Inventory to the appropriate Medical View tabs which appear at the bottom of the Medical History section of the CID. By adding key words or letters, action codes and/or certain report codes, the Medical History will be sorted to the correct tab.
**Chronological**
Displays all medical history sorted by date performed.

**Diagnosis**
Display medical history entries that are part of your Diagnosis List.

**Dietary**
Display items that have either a Z as one of their Action codes, belong to a category name which includes the words Diet or Food.

**Injections**
Inventory items that have the word Inject in the category name or that have either a V or an M as one of their Action codes. Treatments which have the word Inject in the category name or have either a U or an M as one of their Action codes or an I as one of their Report codes/category report codes, will also be included.

**Lab**
Display treatments that have the word Laboratory in the category name or have an L as one of their report codes/category report codes.

**RX**
Display items or treatments that have the letters PHARM or PRESCRIPT as part of the category name or have a P as one of their action codes or P as one of their report codes.

**Reminder**
Display items or treatments performed that have a reminder template defined.

**Surgery**
Display services that have the letters SURGER in the category name or have an S as one of the report codes/category report codes.

**Vaccinations**
Display services that have the word Vaccination in the category name or have a V as one of their action codes.

**X-Ray**
Display treatments that have the words XRay, X-Ray, or Radio in the category name.

**SOAP**
Display treatments for which Medical Condition data has been recorded.

**Photos**
Display items or treatments for which a photograph has been linked.

**Notes**
Display items or treatments which notes have been linked.

**Public**
Display items or treatments which have notes marked as Public in the Enter Medical History window.

**Problems**
Displays problems that have been entered in the patient’s Medical History.

**Attachments**
Displays medical history entries that have associated File Attachments.
Chapter 8: Entering Medical History

**Dental**
Displays medical history entries that have a dental chart attached.

**Use the Medical History Search Box**
When you place the cursor in this box and begin to type, AVImark will limit and display only those treatments and/or inventory items that have been entered that begin with the letters typed.

<table>
<thead>
<tr>
<th>Medical History</th>
<th>Date</th>
<th>Time</th>
<th>Dr.</th>
<th>Type</th>
<th>Code</th>
<th>Description</th>
<th>Qty</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>07-19-07</td>
<td>10:57a</td>
<td>DLM</td>
<td>T</td>
<td>m</td>
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<tr>
<td>07-17-06</td>
<td>1:21p</td>
<td>DLM</td>
<td>T</td>
<td>EXAM</td>
<td>1</td>
<td>Annual Health Exam</td>
<td>1</td>
<td>0.00</td>
</tr>
<tr>
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<td>T</td>
<td>918</td>
<td>EXAM</td>
<td>Needle Aspi Biopsy &amp; Exam</td>
<td>1</td>
<td>30.00</td>
</tr>
<tr>
<td>02-26-05</td>
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<td>DM</td>
<td>T</td>
<td>EXAM</td>
<td>1</td>
<td>Annual Health Exam</td>
<td>1</td>
<td>32.17</td>
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<td>12-06-04</td>
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<td>DM</td>
<td>T</td>
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<td>1</td>
<td>32.17</td>
</tr>
<tr>
<td>04-11-03</td>
<td>8:43a</td>
<td>DM</td>
<td>S</td>
<td>651</td>
<td>EXAM</td>
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<td>1</td>
<td>Annual Health Exam</td>
<td>1</td>
<td>30.00</td>
</tr>
</tbody>
</table>

**Work with the Attachments Window**
If there have been photos, notes, conditions, vaccinations, inventory used or any file attachments specified for the selected entry, those check boxes will be marked accordingly in the Attachment window at the right side of the Medical History area. To display the information attached to the entry simply select the appropriate attachment listed.

**Dental Chart**
Create or view a Dental Chart for the selected entry.

**Form**
Display or create a new form template.

**Inventory Used**
Display or add inventory used with the service.

**Medical Condition**
Display or create a new Medical Condition record.

**More Stuff**
Display or enter Additional Data field information.

**Notes**
Display existing notes or enter new notes.

**Photograph**
Display an enlarged view of a photo linked with a service.

**Attachments**
When in the Medical History area, this will open the History File Attachment window to display all photos, Word documents and spread sheets that have been attached to the selected entry.

**Vaccination**
Display or enter new vaccine information for a treatment.

**Tests**
View or import test results for the selected entry.
DICOM
Send DICOM Imaging requests or view images by accessing the Sound Technologies viewer.

Use the Enter Medical History Window
You may use the Enter Medical History window to enter the information about the treatment you wish to add to the Medical History Area of the patient. Typically you would need to only type the treatment, item, diagnosis or problem code and AVImark would fill in all the other information for you. However, on occasion you may need to make changes to the quantity, price you want to charge or to other default values.

- In the Medical History area, right-click and from the shortcut menu click New to display the Enter Medical History window.

Date
The date the treatment was performed. This date will automatically display today’s date or duplicate the date for the last treatment entered.
- Using the drop down calendar, select the correct date.

Patient
This field is the name of the patient for which to enter the entry into Medical History. AVImark will show the patient currently displayed on the CID.
- If appropriate, use the drop down list and select a different patient.

Code
The treatment, inventory, diagnosis or problem code you wish to enter.
- Type the code for the selected entry.

Description
AVImark will automatically enter the description according to the code which you have entered. You may however, edit the description:
- Type the description if applicable.

Quantity
This field specifies the quantity of treatments or items dispensed. AVImark defaults to a quantity of 1; however, you are able to specify any number to 2 decimal places, for example; 2.67.
- If appropriate, type the quantity.

Amount
AVImark enters the amount for the service as specified in your treatment and inventory lists. You may change the price manually if needed.
- If appropriate, type the amount.

Photos
This field allows you to link a photo related to the medical history entry.
- Double click in this field to link a photo.

Co
The Company number automatically defaults to the client company number, but may be changed manually if needed.
- If appropriate, type the Company number.
Chapter 8: Entering Medical History

At
This is the time that the service was performed. This will be set by AVImark as the current time of day but may be changed manually if necessary.

- If appropriate, type the time.

Type
Denotes the kind of service performed. Although you are able to manually enter the value in this field, it is recommended that you do not alter the setting for a given treatment or item. They are:

- S Non-taxable treatments
- T Taxable treatments
- L Local taxed treatment
- E State taxed treatment
- I Non-taxable inventory
- X Taxable inventory
- C Local taxed inventory
- M State taxed inventory
- D Diagnosis
- P Problem
- O Other
- N Appointment/Follow up notes
- N Notes
- V Visit
- J Journal

Public
This box is defaulted to being checked for you. However, you may uncheck this field if those services are not to be displayed on a Patient Chart that is marked as Public.

Doctor
This is the doctor’s ID who performed the service.

- Using the drop down menu, select the correct doctor.

Form
This field allows you to attach an MS Word form to the Medical History entry.

- Double click in this field to attach a form to the entry.

Xls
You may attach an Excel spreadsheet file to any entry in Medical History.

- Double click in this field to attach an Excel spreadsheet.

Problem
AVImark allows you to associate the medical history entry with whatever problem the patient is being treated for. For detailed discussion on the Problem list, refer to “CHAPTER 13: PROBLEM LIST”.

- Using the drop down menu select the appropriate Open problem.

Decline
This field is used to mark a recommended service as Declined in which the client has refused.

- If appropriate, check this box.

Admitted
This field is used to identify the doctor that admits the patient into the hospital.

- If appropriate, use the drop down menu to select an Admitted Doctor.

Variance
When dispensing a controlled substance, AVImark allows you to specify the amount, if any, that was spilled, broken, leaked, and so on. There are 2 fields provided for this entry; the first for the amount lost, and the second for the code for the reason of loss.

- When applicable, enter the amount and code of the controlled substance which was lost.
By AVImark automatically enters the ID of the employee who is currently logged in. In the case where employees are not entered as users in Users and Security, you will need to manually enter this information.

- Type the employee ID.

Site
The site field, if being used, will allow the person entering the medical history to select the site at which they are currently entering the medical history from. Single site clinics will not be using the Site fields found in the AVImark program.

- If appropriate, use the drop down menu and select the correct site.

Journal
AVImark allows you to attach a Windows Journal file to any Medical History entry.

- Double click in this field to attach a Journal file.

Zip
This field is for clinics in the state of Kansas, Ohio, Georgia, and Washington. Due to different tax laws, this field provides the user with the ability to apply tax, not by what county the clinic is located, but by the area the services are performed in or items are purchased by the client, or by where the client is from.

- Type the zip code for where the services were actually performed.

Add New Medical History
You may add as many Medical History entries for the selected patient into the Medical History Area of the CID as you wish. There are several ways to enter Medical History entries:

Add Medical History entries one at a time

- In the Medical History area, right-click and from the shortcut menu click New to display the
- Enter Medical History window.
- Enter the Code of the treatment, item, diagnosis or problem.
- Using the TAB key, tab to the Description, Quantity and Amount fields which may be changed if you wish.
- Click Done to enter the service into Medical history.

Add Medical History entries using the search method
AVImark will find the service for you when the code is not known.

- From the Medical History area, right-click and from the shortcut menu click New.
- TAB to the Description field and type at least 3 letters for the Treatment, Item or Diagnosis you are looking for.
Chapter 8: Entering Medical History

- Double click the Treatment, Item or Diagnosis.
- Tab to the **Quantity** and **Amount** fields which may be changed if you wish.
- Click **Done** to enter the service into Medical history.

**Add Medical History entries using the Choose method**

You may select treatments, inventory items, problems, and/or diagnoses by first opening the Treatment List, Inventory List, Problem List or Diagnoses List window.

- In the Medical History area, right-click and from the shortcut menu point to **Choose** and click **Treatments**, **Items**, **Diagnosis** or **Problems**.
- Select the correct treatment(s), item(s), problem(s) or diagnosis you wish and click **Done**.

**Enter Treatments for Multiple Patients**

AVImark lets you enter as many treatments, inventory items and diagnoses as you wish for multiple patients that you have selected.

- In the Patient area, right-click and from the shortcut menu click **Choose** to display the Choose Patient window.
- Select a patient and using the keyboard press and hold the CTRL key while selecting other patients to highlight them.
- With the correct patients selected, right-click and from the shortcut menu point to **Choose** and click **Treatments, Items or Diagnosis** to display the correct list.
- Select the correct treatment(s), item(s) or diagnosis you wish and click **Done** to add to the patient(s) Medical History.

**Change Medical History Information**

You may change the information for any Medical History entry. Any field within the Enter Medical History window may be changed with the exception of the code field.

- With the correct entry selected right-click and from the shortcut menu click **Change** to display the Enter Medical History window.
- After you have made the changes click **Done**.

*Changes made after the entry has been posted to accounting will NOT be reflected on the client’s accounting records.*
View and/or Add Medical History Notes

For a detailed discussion on viewing and adding notes, refer to “Error! Reference source not found.”

- With the desired entry selected right-click and from the shortcut menu click Notes.
- To attach notes to this entry select Enter Notes.
- From the Notes right-click shortcut menu select Show All to view all notes, including prescriptions, directly in the Medical History.
- From the Notes shortcut menu select Show All but RX to view all notes except prescriptions.
- Selecting Public Only will display only notes that have been marked as public.
- To cause the notes to not be displayed on the Medical History area select Show None.
- Show All with Note Action will display those instructions that have been added to the entry either from the Treatment or Inventory List, and contain the action code of 2.

View and/or Add Medical History Doctor Instructions

When entering a Treatment, Item, Problem or Diagnosis into the Medical History of a patient, Doctor’s Instructions that are linked to those codes can be viewed and modified from the CID.

- With the correct entry selected right-click and from the shortcut menu click Doctor’s Instructions.
- After you have made the changes click Done.

Delete and Undelete Medical History

AVImark gives you the ability to remove and or undelete medical history entries.

Remove selected medical history

- Select the medical history entry. Right-click and from the shortcut menu click Remove.
- You will need to click Yes to confirm.

Undelete medical history

- In the medical history area, right-click and from the shortcut menu click Undelete to display the Undelete Medical History window.
- You will need to click Yes to search for deleted history.
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Purge Data Files
AVImark gives you the ability to delete (purge) Medical History records older than a specified date, allowing you to completely remove old, unwanted Medical History records from your files. However, we strongly recommend that you DO NOT attempt this without the help of our Support Staff.

Print a Rabies Certificate
Although the certificate would normally be printed automatically at the time you print the client’s invoice, AVImark gives you the ability to print or even reprint a Rabies certificate from the Medical History area.

Decline Medical History Entries
AVImark allows you to identify a recommended treatment that has been declined by the client. These services will appear in medical history as de-highlighted, with the description of the treatment preceded by DECLINED.

---

- Select the entry(s) to be undeleted. Right-click and from the shortcut menu click **Select** for the individual entry or click **Select All** to select all entries.
- Click **Undelete**.

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- Select the entry(s) to be undeleted. Right-click and from the shortcut menu click **Select** for the individual entry or click **Select All** to select all entries.
- Click **Undelete**.
You will need to click **Yes** to confirm.

Discount Medical History Entries
You may specify a discount for any entry in medical history that has not yet been posted to the client’s account.

- Select the medical history entry that is to be discounted. If there are several entries to be discounted, hold down the **Left Mouse** button and move the mouse pointer over the entries you wish to discount.
- Right-click and from the shortcut menu click **Discount** to display the **Apply Discount** window.
- Select the **Retain previously overridden prices** option if you would like the discount to be added to any other discount this client is receiving. Select the **Restore normal price** option if you would like to apply the discount to the normal price of the treatment/item as defined in the treatment/inventory list.
- As a whole number, type the discount percentage you would like to apply. For example, type **10** to indicate **10%**.
- Click **Continue**.

Print an MS Word Document
You may print any MS Word document from the medical history area. If there are any merge words in the text of the document, information about the selected patient and client will be inserted into the document.

- In the medical history area, right-click and from the shortcut menu click **Document** to display the Print Document window.
- Double click in the **Document** field to display the **Open** window.
- Double click on the file name you wish to use.
- In the Print to field, specify the printer to print to and click **Print**. To display the document on screen, select **Preview** and click **Print**.

<table>
<thead>
<tr>
<th>To learn more about:</th>
<th>Search the Help for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rabies Certificate</td>
<td>Rabies certificate; Print certificate</td>
</tr>
<tr>
<td>Printing Documents</td>
<td>Print MS Word document</td>
</tr>
</tbody>
</table>

Print Prescription Labels
You may print a prescription label for any medical history entry.

- Select the correct medical history entry. Right-click and from the shortcut menu click **Drug Label** to display the Drug Label window.
- Type the information you want to appear on the label and click **Print**.

Refill a Prescription
You may refill prescriptions from the patient’s medical history. However, at least 1 day needs to have passed since the original prescription was filled.

- Select the correct medical history entry. Right-click and from the shortcut menu click **Refill** to display the Enter Medical History window.
- Enter or change the quantity and/or provider if appropriate and click **Done** to display the original drug label.
- Enter any changes necessary on the drug label and click **Print**.
Add File Attachments

AVImark gives you the option to attach multiple files to medical history entries, such as documents, images, spreadsheets, and so on.

- In the Medical History area, right-click and from the shortcut menu click **File Attachments** to display the File Attachment window.
- Right-click and from the shortcut menu click **New** to display the New History File Attachment window.
- Use the browse option at the end of the **Filename** field to search for the file you would like to attach.
- Select the file name you would like to attach and click **OK**.
- Attach multiple files using the same procedures.

Enter Medical History Forms

AVImark allows you to use Microsoft Word forms to extend the Medical History record keeping capability. In addition, any forms entered into a patient’s medical history through the use of this feature may be printed following the client invoice.

- Select the correct Medical History entry. Right-click and from the shortcut menu point to **Form** and click **Edit**.
- If no form was previously entered for the selected Medical History entry, click **Yes** at the prompt to display the Open window.
- Select the correct form and click **Open**.
- Enter the information desired on the selected form and then **Save** the document.
- To print the form from the Medical History entry, right-click and from the shortcut menu point to **Form** and click **Print**.

Add Medical History using History Mode

You are able to enter medical history that happened at some time in the past in such a way that the client will not be charged for the entries. In addition, History Mode allows you to maintain the accuracy of the reminding capability of AVImark.

- In the Medical History area, right-click and from the shortcut menu click **History mode**.
- Right-click and from the shortcut menu click **New** to display the Enter Medical History window.
- Enter the **Code** of the Treatment or Inventory item.
- Using the **TAB** key, tab to the **Description**, **Quantity** and **Amount** fields which may be changed if you wish.
- Click **Done** to enter the service into Medical history.
- To exit History Mode, right-click and from the shortcut menu click **History**.
Specify Inventory Used by the Selected Treatment

You may specify inventory usage for any treatment in medical history. Normally, you would have already specified the inventory items used by each treatment when you set up your Treatment List so that when these treatments are performed, the correct inventory item quantities will be relieved.

Specify Inventory Used to a selected treatment

- Select the correct treatment in Medical History. Right-click and from the shortcut menu point to Inventory and click Inventory used to display the Inventory Used window.
- Click Yes at the prompt to display the Inventory List window.
- Select the inventory item(s) to enter into the Inventory Used window and click Done.

Add items and/or change quantities when inventory is already specified for the treatment

- Select the correct treatment in Medical History. Click Inventory Used in the Attachments area of Medical History to display the Inventory Used window.
- Select the correct item in the Inventory Used window. Right-click and from the shortcut menu click Change to change the item or click Choose to display the Inventory List window.
- Click Done.

Move Medical History

You may move a selected medical history entry from one patient to another.

- Select the correct Medical History entry to be moved. Right-click and from the shortcut menu point to Move and click To patient. You will need to click Yes to confirm.
- In the Client Selection window, type the client and patient’s name you would like to move the entry to and click Continue to open the patient’s record.
- Click Yes to confirm the move.

Drag and drop Medical History to other patients

AVImark allows you to move Medical History entries by dragging history to the patient’s tab listed at the bottom of the CID, or if the List Patients view is used, you may drag history to the list of patients in the center of the CID. If multiple clients are open on the CID, you may drag history from one client to another by dragging onto the client tab, and then to the appropriate patient name.

- Select the correct Medical History entry and hold the left mouse button down until you see an attachment at the end of the mouse pointer.
- Drag the attachment to the correct patient tab at the bottom of the CID and continue to hold the mouse button until the record of the patient opens.
  OR
- Drag the attachment to the correct client’s tab and continue to hold the mouse button until that client’s record opens.
- Drag the attachment to the correct patient tab at the bottom of the CID.
- Release the mouse button to display the options to either Move Service(s) or Copy Service(s).
- Click Move Service(s) to move the entry, all included notes, inventory used, SOAP records, and so on.
- Click Copy Service(s) to add the service as if it were a new entry.

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<tr>
<td>Using History Mode</td>
<td>History mode</td>
</tr>
<tr>
<td>Inventory used</td>
<td>Inventory Usage</td>
</tr>
</tbody>
</table>
Change Sequence of Displayed Medical History

You may change the sequence of Medical History entries in one of three methods. These are entries that either have not yet been posted to accounting or do not have a corresponding account entry.

- Select the correct Medical History entry. Right-click and from the shortcut menu point to **Move** and click either **Up (-)** or **Down (+)**. You will need to click **Yes** to confirm.
- OR
- Select the correct Medical History entry and use the (-) and (+) keyboard keys.
- OR
- Select the correct Medical History entry. Hold the left mouse button down until you see an attachment at the end of the mouse pointer and then drag the entry to the desired location.

Link a Photo/Image with the Selected Entry

- Select the correct treatment from Medical History. Right-click and from the shortcut menu click **Photo** to display the AVImark Image Editor.
- Within the Image Editor window select **Get Image** from the **File** menu to copy the image from a camera.
- Select the appropriate image and click **OK**.
- To copy the image from another director select **File**, **Open**.
- Select the appropriate image and click **Open**.
- To attach the photo to this entry select **File**, **Save as**.
- Enter the desired photo name and click **Ok** to save the image in the desired location.

### To learn more about:

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Enter Vaccination Information

Typically vaccination information is entered at the time the vaccination is entered into medical history. This vaccination information is originally entered in the *Vaccine System Tables*. When you enter rabies or any other vaccination for a patient into Medical History, the Vaccination Information window will appear immediately, provided the rabies treatment has an **R** Action Code and other vaccinations have the **V** Action Code.

- Enter the correct vaccine into Medical History to display the Vaccine Information window.
- If appropriate, make any necessary changes.
- If appropriate, use the **Vacc ID** field to enter the **Rabies tag number**.
• In the **Vaccine field**, use the drop down list and select the correct vaccine and click **Done**.

**Work with the WhoGot List**

You may use the Whogot list to view, sort, print, or go to the CID of any patient receiving the selected treatment, item or diagnosis.

• With the correct Medical History entry selected, right-click and from the shortcut menu select click **WhoGot** to display the Treated Patients window.

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