

## Ocular History Taking

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## Role of the technician

- The role of the ophthalmic assistant in obtaining a Hx will vary with the attitudes and opinions of the supervising eye doctor.
- Ask open ended non-leading questions
- Does not interpret the results, but passes them to the doctor

## Signs – vs - symptoms

- The important of the symptom is a difficult task because a symptom is merely an expression if the disorder of function.

## Case History defined

- ⊙ The gathering of patient information on the current medical state and history of present illness
- ⊙ A series of specific and orderly questions directed to solicit information about the patient
- ⊙ By means of the history the doctor attempts to reconstruct the patient's current health state

## Ensuring A Good Case Hx

- ⊙ Review pt chart before the pt arrives
- ⊙ Write down any questions from previous visit
- ⊙ If this is a follow-up visit for a pre-existing medical condition, ask about the state of the condition (improved, same, decline)

The classification or sorting of a pt visit is called?

## Insurance Considerations

- ⊙ What is documented as the reason the patient came to the clinic is what the insurance company is looking to pay you for
- ⊙ Be sure you understand the insurance you are filing (VSP, CMS, BCBS, etc.)
- ⊙ Be thorough, you can't write too much, but you can write too little

## Levels of History

- There are 4 levels of history:
  - Problem focused (PFH)
  - Expanded Problem Focused History
  - Detailed History (DH), CC, Ocular ROS, PFH, Social Hx
  - Comprehensive History (CH)

## Case History

### Chief Complaint

- Reason for the patient visit recorded in Patient's own words
- This is the basic complaint. One area of focus... **does not include HPI**
- If there is no complaint, insurance is not going to pay, so educate the patient they will be financially responsible for the visit

## History of Present Illness

- Ask all the questions necessary to aid your doctor in discovering the root cause of the patient's current condition (ie. Who, what, where, how, how long, How old is patient, pain assessment, is there anything that brings relief, last eye exam, last physical exam, illicit and legal drug use, dosage/frequency, alcohol use/amount, and patient/family medical history)
- Questions must be precise and pertinent to the chief complaint

## HPI Cont... min 4 elements

- Condition
- How long
- Pain Assessment
- Does anything bring relief (glasses, meds,



## HPI Cont...

- Rule out specific ocular problems or conditions
- ✓ surgery
- ✓ injury
- ✓ vision training
- ✓ medications
- ✓ refractive history
- ✓ Medical history
- ✓ Family history



## 14 Elements of an Exam

- |                                     |                             |
|-------------------------------------|-----------------------------|
| 1. Test of Visual Acuity            | 1. Anterior chamber         |
| 2. Confrontation Fields             | 2. Crystalline lens         |
| 3. Ocular Motility                  | 3. IOP measurement          |
| 4. Inspection of the conjunctiva    | 4. Posterior segment        |
| 5. Examination of the Ocular Adnexa | 5. Retina                   |
| 6. Pupil Examination                | 6. Neurological orientation |
| 7. Slit lamp exam of the cornea     | 7. Psychologic – Mood       |

## Questions in logical order

- Have a plan
- Be sure to have a routine/rhythm in which to ask questions
- Be sensitive and listen attentively
- Document any sensitive subjects to for future use



Has anyone ever lost a patient?

## Family Hx

- Adoption Hx
- This identifies a possible predisposition to a chronic disease
  - Eye lid story



## Important Medication questions

- ⊙ What are you taking
- ⊙ For what condition
- ⊙ How long have you had this condition
- ⊙ Amount (2 gtts/hr)
- ⊙ Dosage (tid, bid, prn)
- ⊙ Ask patients to bring a list of meds, copy for their records
- ⊙ Story about glaucoma and blood pressure meds



## What is meaningful use

- Improve quality, safety, efficiency, and reduce health disparities
- Improve care coordination
- Improve population and public health
- Program is mandated by law to receive incentives
- ERx and E-prescribing
- Use of HER technology to submit clinical quality measures

## What is “Meaningful Use”?

- Core set and a menu of objectives that are specific to eligible professionals.
- There are a total of 24 meaningful use objectives, 19 of these 24 objectives must be met
- 14 required core objectives, 5 objectives chosen from a list of 10 menu set objectives

## Meaning Use cont...

- Meeting the measure for each objective
- How to calculate the numerator and denominator for each objective
- How to qualify for an exclusion to an objective
- In-depth definition of terms that clarify objective requirements
- Requirements for attesting each measure

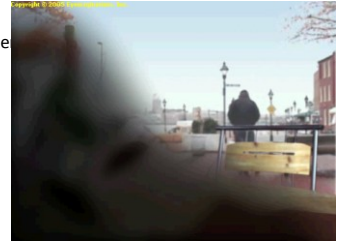
## Benefits of Meaningful Use

- Complete and accurate information
- Better access to information
- Financial support



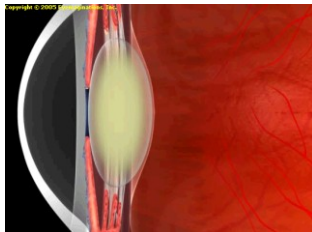
## Ocular Symptoms

- ☐ Ask open ended questions and document what the patient says
- ✓ itching
- ✓ burning
- ✓ tearing
- ✓ redness
- ✓ irritation
- ✓ other symptoms



## Ocular History Cont...

- Rule out specific ocular problems and conditions, such as:
  - glaucoma
  - cataracts
  - keratoconus
  - surgery
  - previous injuries



## Timelines are important

- What goes to Vegas does not always stay in Vegas
- International trips
- Recent vacations



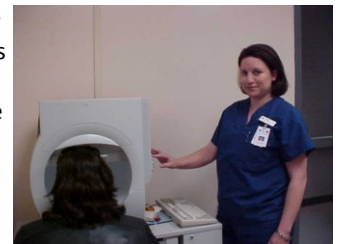
## Pain Assessment

- If the patient is in pain, you must evaluate the level of pain
- Ask if anything relieves the pain...cold, laying down, etc
- Ice...numbs, slows blood flow
- Pain associated with trauma
- Penetrating injuries



## Questions: Set up for testing

- A good Case Hx will set you up to know the test procedures that you need to perform before the patient sees the doctor



## Routine visit or Asymptomatic pt?

- There is no such thing as a routine visit...until the patient is ready to leave your office, you can't say that it was a routine visit



## Important spectacle questions

- Are you wearing your most current Rx
- If no, why not
- If the old ones are broke, did you bring them with you
- Lens warpage!
- Protect doctors chair time



## Cautions

- Insurance requirements must be met
- Don't document Dx
- Watch your time!
- Control the interview
- Be sensitive and professional
- Document everything
- Be clear! Don't make the doctor guess
- Documentation must line up w/CC

## Audience questions

- What is the first question to ask the patient
- What is an example of an open ended question?
- Give an example of a good follow up question
- What is a logical order for questions
- Is it okay to revisit a category of questions

## Quiz

- Which is a part of the Case Hx
  - Chief complaint
  - Family Hx
  - Visual Acuity
  - Medication usage
- If a patient reports having a Hx of color deficiency, what test will you set up for?
  - Suppression test
  - Color vision test
  - Stereo test
  - Cover test

## Quiz

- Diabetic patient says that their vision fluctuates, what is a good follow-up question?
  - Are you a democrat
  - can you field dress a moose
  - Are you taking meds
  - What was your last A1C
- Which of the following test would you use on this pt?
  - Cover test
  - Worth 4-dot test
  - Amsler grid
  - Stereo fly test

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THANK YOU