# THE LONGITUDINAL PRECEPTOR PROGRAM

# Student Course Book Academic Year 2019-2020 Year 1



# **University of Massachusetts Medical School**

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# **TABLE OF CONTENTS**

Course Directors/Program Contacts	3
Welcome	4
General Instructions	5
Helpful Hints for Students	6
Guidelines for Professional Behavior	7
Interview Checklist Sample	8
LPP Objectives Guideline	9
Objectives - Detailed Information	10
Evaluation and Grading	14
APPENDICES	
Why do people go to the doctor?	16
Complete Medical History and Write-up Framework	17
Components of the Medical History	19
Review of Systems – Lay Terms	21
Guidelines for Presentations	25
Problem list, Assessment & Plan guide	27

# LONGITUDINAL PRECEPTOR PROGRAM CONTACTS

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## Welcome to the LPP!

The Longitudinal Preceptor Program (LPP) is designed to give you an opportunity to interview and examine patients as well as to experience the practice of medicine firsthand. You will participate in actual clinical sessions with a physician, assisting them in the care of their patients. We hope that you will find this to be a valuable and rewarding part of your medical education, as well as being "one of the best things about medical school" according to your fellow students!

You are required to participate in 11 precepting sessions for the academic year (AY) in order to receive course credit. You and a partner will be assigned to 2 different preceptors: 1) a primary care preceptor (internal medicine, family medicine, hospitalist, or emergency medicine) and 2) a specialist or pediatrician. The goal of doing this is to broaden your experience. You will spend 6 sessions with 1 physician and 5 with the other for a total of 11 sessions between the 2 preceptors. You and your partner should work out how to contact your preceptors together and coordinate when each of you will be going to your sessions.

Therefore, it is important to maintain good communication with your preceptors. No matter how busy your preceptors may be, they will always appreciate you keeping them informed if you will be late or unable to attend a session. Email or cell phone are the preferred methods of communication. It makes for a smoother experience for both of you. Make the most of it! While there are clear course objectives that you must meet, we encourage you to think about any personal goals that you would like to achieve during this year-long experience and to discuss those with your preceptor as well.

The LPP is an opportunity to practice interviewing, develop a rapport with patients, and observe how a physician practices. One of the first lessons is to understand why people go to visit a doctor in the first place! While this may seem intuitive there are common presentations that are helpful to keep in mind. A useful outline in the appendix can help you to organize your thoughts around a particular patient interaction.

The learning objectives of the LPP are met by placing students in a variety of clinical settings and specialties. Therefore, *you can expect differences* between your experience and those of your classmates. As long as you are meeting your basic educational goals then you are on the right track. If this is not happening, or you are having other difficulties with your LPP assignment, let us know.

Sincerely,

Peggy, Wu, M.D. Carly Eressy

Course Coordinator Educational Specialist II

Link to the LPP website for preceptors and students:

http://www.umassmed.edu/oume/curriculum/longitudinal-preceptor-program/

# **General Instructions/Requirements**

- 1. A total of 11 precepting sessions are required for LPP year 1. Ideally one session every other week. Plan the entire year in the beginning; planning ahead will make it easier for you and in most cases for your preceptor as well.
- 2. As mentioned above, you will split your 11 sessions between 2 preceptors. There will be another student also assigned to the same 2 preceptors so it's easiest to work with that student and decide on the timing/attendance your sessions together (each student should attend individual sessions with their assigned preceptors).
- 3. Record each visit on an online checklist via the OASIS application. One checklist should be filled out and submitted online after each visit via OASIS. (Instructions are on Blackboard in FM 104)
- **4.** You are **required** to call your preceptor to schedule an initial meeting (approximately 15-20 minutes) to arrange your schedule before you formally start seeing patients. **Contact your preceptors (after discussion with your partner) to schedule this first meeting ASAP.** Ideally, this should occur before you start your first precepting session, but it may be that your preceptor prefers to meet by having you arrive early on your first day. Email or cell phone (or both) are typically the preferred method of communication with your preceptor. Discuss this at your first meeting.
- 5. The initial meeting is to schedule your precepting times, to review the course book and your educational goals with your preceptor.
- **6.** In November, **you will receive a self-evaluation** through OASIS. You will need to review and discuss with your preceptor. **These evaluations are due back no later than the end of December**.
- 7. Finally, it is important to recognize that although you are a student you are becoming a medical professional. You will be expected to dress and act accordingly. Please review the medical school's guidelines for professional behavior on the page 7 of this syllabus prior to your first clinical encounter.

# **Helpful Hints for Students**

The following are some helpful hints for you as you begin your LPP experience:

- 1. It is your responsibility to contact the preceptor and arrange on-site visits. Discuss with your preceptor the best way to communicate with him/her phone, email, etc.
- 2. In regard to attire, this is best discussed with your preceptor. Some preceptors may wear white coats and prefer that you wear them as well. Some may prefer ties, and *jeans are not* appropriate.
- 3. Punctuality remember, many of your preceptors have very busy practices. Please be on time for scheduled visits or notify your preceptor if you will be late.
- 4. Get to know the staff at your preceptor's office. Physicians, even in a solo practice, do not work alone. The office staff may include nurses, receptionists, lab personnel, and office workers. Let them know who you are as soon as possible. In many instances, these people can be very helpful, supportive and instructive.
- 5. How should you introduce yourself? Most preceptors will introduce you to patients and staff as a student/doctor or medical student. You can clarify this with your preceptor.
- 6. School ID badge Always wear an identifying name badge, especially when dealing with patients in a clinic or hospital setting.
- 7. Some preceptors are busier than others and may not have the time to discuss individual patients with you during patient hours. Ask your preceptor <u>when</u> is the best time to ask questions or discuss things. Also <u>ask</u> your preceptor for feedback on your progress if he/she does not voluntarily give this to you!
- 8. It may help to jot things down on a small note pad during your visit (or use the note sheet in this coursebook). In this way, you can keep a record of your questions, what things to "look up" later, or to discuss in your small group session, or to ask your preceptor at the end of the session. Please use the checklists to help you to evaluate what you've done at each session and what goals you have for the next session.
- 9. **Confidentiality** In order to ensure the confidentiality of the doctor-patient experience, any discussion of patient-related issues must be conducted in an appropriate private setting and <u>only with those individuals directly concerned with patient care.</u>
- 10. **Please! Please!!** Review the complete medical history framework this is the format you will use for the rest of your career! Please note: this format is the same for obtaining the history, orally presenting the history, and writing up the history. Learn it now and learn it well!

Most importantly, **Enjoy this opportunity!** 

If you have any questions or problems, please contact Carly Eressy at LPP@umassmed.edu.

# **GUIDELINES FOR PROFESSIONAL BEHAVIOR**

The Faculty and Student Body of the University of Massachusetts Medical School regard the following as guidelines for professional behavior. These areas are derived from the school's Technical Standards (see Student Handbook). Students are expected to show professional behavior with or in front of patients, members of the health care team, and others in the professional environment (school, hospital, clinic, office) including members of the faculty and administration, other students, standardized patients, and staff. Faculty members and administrators are expected to abide by similar standards.

#### PROFESSIONAL ATTRIBUTES

#### **Displaying honesty and integrity**

- Never misrepresents or falsifies information and/or actions (i.e. cheating)
- Does not engage in other unethical behavior

#### Showing respect for patient's dignity and rights

- Makes appropriate attempts to establish rapport with patients or families.
- Shows sensitivity to the patient's or families' feelings, needs, or wishes.
- Demonstrates appropriate empathy.
- Shows respect for patient autonomy.
- Maintains confidentiality of patient information.

#### Maintaining a professional demeanor

- Maintains professional demeanor even when stressed; not verbally hostile, abusive, dismissive or inappropriately angry.
- Never expresses anger physically.
- Accepts professionally accepted boundaries for patient relationships.
- Never uses his or her professional position to engage in romantic or sexual relationships with patients or members of their families; never misuses professional position for personal gain.
- Conforms to policies governing behavior such as sexual harassment, consensual amorous relationships, hazing, use of alcohol, and any other existing policy of the medical school.
- Is not arrogant or insolent.
- Appearance, dress, professional behavior follow generally accepted professional norms.

#### **Recognizing limits & when to seek help**

- Appears aware of own inadequacies; correctly estimates own abilities or knowledge with supervision.
- Recognizes own limits, and when to seek help.

#### RELATIONSHIP TO OTHERS

#### Responding to supervision

- Accepts and incorporates feedback in a non-resistant and non-defensive manner.
- Accepts responsibility for failure or errors.

#### Demonstrating dependability and appropriate initiative

- Completes tasks in a timely fashion (papers, reports, examinations, appointments, patient notes, patient care tasks).
- Does not need reminders about academic responsibilities, responsibilities to patients or to other health care professionals in order to complete them.
- Appropriately available for professional responsibilities (i.e. required activities, available on clinical service, responds to pager).
- Takes on appropriate responsibilities willingly (not resistant or defensive).
- Takes on appropriate patient care activities (does not "turf" patients or responsibilities).

#### Interacting with other members of the team

- Communicates with other members of the health care team in a timely manner.
- Shows sensitivity to the needs, feelings, and wishes of health care team members.
- Relates and cooperates well with members of the health care team.

Approved by the Education Policy Committee 11/01



# **SAMPLE - LPP 1 Interview Checklist on OASIS**

# **Session Date:**

# You must submit a separate form for each session! Accomplishments for this LPP session

Please indicate the number of times each of the following occurred.

I observed my preceptor				I performed		d
0 times	1-2 times	≥3 times		0 times	1-2 times	≥3 times
0	0	0	7 Cardinal Features of the HPI	0	0	0
0	0	0	Past Medical History	0	0	0
0	0	0	Social History (including habits)	0	0	0
0	0	0	Family History/Genetic History	0	0	0
0	0	0	Meds/Allergies	0	0	0
0	0	0	Counsel a Patient (e.g., smoking, diet, exercise)	0	0	0
0	0	0	Some Portion of Physical Exam	0	0	0
0	0	0	Obtain Vital Signs	0	0	0
0	0	0	Develop a Patient Problem List	•	0	0
G	(D	()	Other - please specify:	ē	9	0

	0 times	1-2 times	≥3 times
Number of times I was observed by my preceptor	0	0	0
Number of times I was given feedback by my preceptor	0	0	0

# **LPP Year 1 Objective Guidelines**

This grid is to guide you in the specific learning objectives to be completed in LPP year 1. The learning objectives of the LPP are met by placing students in a variety of clinical settings and specialties. Therefore, you can expect differences between your experience and those of your classmates. Some of these guidelines may be difficult to complete depending on your assigned clinical setting. As long as you are meeting your basic educational goals then you are on the right track. If this is not happening, or you are having other difficulties with your LPP assignment, let us know as soon as possible.

- 1. Demonstrate knowledge of work flow of your practice site.
- 2. Describe Communication Skills used by your Preceptor in 1 patient encounter per session.
- 3. Demonstrate the ability to gather the 7 cardinal features.
- 4. Gather a History of Present Illness (HPI).
- 5. Gather components of the complete history: HPI, PMH, Meds, Allergies, FH, SH.
- 6. Demonstrate oral presentation from your LPP's history (see appendix and review Pass One in resources).
- 7. Observe the difference between a chronic/follow-up visit and acute illness visit.
- 8. Participate in a Continuity Patient Encounter if your practice setting is amenable. Options can include: see same patient again, consultant visit, accompany preceptor to home visit, attend procedure.
- 9. Describe the role of another member of the patient care team through working with them during one of your sessions.
- 10. Utilize the patient's Electronic Health Record (EHR) to find vitals, medication list, diagnostic tests, medication allergies.
- 11. Complete preceptor and self-evaluation (due early December for discussion with preceptor at final fall semester visit) to demonstrate self -assessment skills
- 12. Complete and Submit the End of Semester Reflective Write-up via email to LPP@umassmed.edu (your name & class year in the subject line)
- 13. Perform LPP Presentation in DCS small groups spring semester
- 14. Gather the Complete History over the course of the semester: HPI, PMH, Meds, Allergies, FH, SH.
- 15. Discuss the components of Health Maintenance/Disease Screening for patients. system and notes resources In FM 104 to present in DCS; give age appropriate milestones, immunizations and screening.
- 16. Demonstrate counseling skills with a patient (e.g. smoking, exercise, diet).
- 17. Demonstrate components of the physical exam –vitals, HEENT, heart, lung abdomen, musculoskeletal, Neurological.
- 18. Develop and Discuss Problem Lists (listing findings, group findings, problem list), Assessment & Plans for one patient at each session. Review with your preceptor.

# DETAILS OF LPP year 1 OBJECTIVES

- 1. Communication Skills/Interviewing: Observe your preceptor interviewing patients: how s/he introduces him/herself and opens the interview; how the four functions of the medical interview are addressed; how the chief complaint is characterized utilizing the seven cardinal features of the problem; how the preceptor addresses cultural issues and how they affect the patient/physician relationship. Observe how the patient perceives his/her illness and how the various cultural, emotional, and social perspectives through which the patient sees his/her illness influences the office encounter. Practice your interviewing skills (reflection, legitimization, partnership, respect and support) to develop a relationship with the patient and attend to their comfort during the interview.
- 2. History of Present Illness/Complete History: Practice obtaining the components of the medical history, becoming comfortable with the questions and format that is traditionally used. We realize that performing a complete history, using all of the components at one time is a skill that develops over time. Therefore, early in the year we would like you to do as many of the components as you are able to with each patient that you interview. Refer to the components of the medical history in the appendix, for a more detailed review of the specific questions/information in each component. There are several components that comprise the medical history:
  - a. Chief complaint
  - b. History of Present Illness (HPI) utilizing the 7 cardinal features
  - c. Past Medical History, Medications, Allergies
  - d. Family History
  - e. Social History
  - f. Review of Systems
- 3. Demonstrate oral presentation skills: This is one of the ways that you will be communicating with others regarding patients. The oral presentation is a basic skill that you will utilizing throughout your career. This skill takes practice and the LPP setting is a great place to begin learning this skill. Discuss with your preceptor ways you can start practicing the oral presentation with the patients you are seeing. Have them demonstrate how they do an oral presentation. Refer to the appendix for the format of an oral presentation and view the Pass One video that is in the resource section for DCS1 (FM104) on BBL
- 4. Observe the difference between a chronic/follow-up visit and acute illness visit: Identify a patient with an acute illness and discuss with your preceptor how they approach this type of visit. Examples you may encounter include: Upper Respiratory infection, Earache, Sports injury. Identify a patient with a chronic illness and discuss with your preceptor. Examples you may encounter include: Asthma, Neurodevelopment problems, and Cystic fibrosis in children; Hypertension, Diabetes, Psychiatric Conditions and COPD (Chronic obstructive pulmonary disease) in adults. Observe the different approaches they may use during the encounter. Also look for differences in how a preceptor approaches a well-established patient compared to a patient they have never met before.

- 5. Participate in a Continuity Patient Encounter: Discuss with your preceptor to see if the office could arrange a follow up appointment with a patient you have seen at a time when you will be back in the office. Observe the differences in the encounter when you see the same patient a second or third time. You may also want to see if that patient has other medical appointments within the healthcare system and ask to attend those as well. This could be visits with other specialists or other scheduled tests such as radiology procedures, cardiac testing, home visits, or pre-op testing. Not all practice settings (emergency department) are amenable to have continuity with the patients you are seeing so options would be to accompany a patient to the medical floor if admitted or visit them the following day. Patients always seem to remember students they have seen so look for the initial reaction they have when they see you again and get a feel for how you have already established some level of rapport with that patient.
- **6.** Describe the role of another member of the patient care team (IPE or Interprofessional Medical Education): Working with members of the patient's health care team is a valuable experience. This will help you to understand the team members in your preceptor's office and the role they play in the patient's care. Examples could include spending some time with the triage nurse on the phones, working with the health assistants rooming the patients, spending time in the lab or radiology, or working with the front desk staff at registration.
- 7. Electronic Health Record (EHR): Most medical offices and hospitals now utilize some form of a medical record on EHR. Ask your preceptor to guide you through ways he/she uses the EHR in the care of their patients. This will be very helpful as you move into the inpatient setting during your hospital sessions. Try to find vital signs, medication lists, medication allergies, problem lists, health maintenance screening tests.
- **8.** Preceptor and Self Evaluation: In November, you will receive a self-evaluation via OASIS. These evaluations should be filled out and you should schedule a time to review and discuss with your preceptor at your last LPP session of the fall semester. Please be sure to schedule time for this with your preceptor. Preceptors will complete an evaluation on their students in March of 2020.
- 9. End of Fall Semester Reflective Write-Up; <u>DUE 1/31/20 students must submit this</u> reflection to <u>LPP@umassmed.edu</u> with their name and class year in the subject line. This assignment will be forwarded to DCS1 small group leaders for evaluation. This is a grade bearing assignment.

This is an opportunity for you to take some personal time to sit back and reflect on becoming a doctor and doctoring. Please complete a written narrative, reflecting on a specific experience or on your total experience to date with patients. Include any or all of the following reflections: How has working with patients affected you? How, if at all, has your perception of what a doctor is changed? How, if at all, has the way in which you would practice as a physician changed? Have you observed examples of patient advocacy where the doctor has gone out of their way to help a patient? Feel free to comment on any other impact this experience has had for you, either good or bad.

There is no required length to the write-up but we encourage you to be thoughtful and complete. You may want to reflect on your experience over the winter break – so this component is not due until the end of January, but you are encouraged to complete it sooner.

This writing assignment will not be shared with your preceptor (although you are certainly welcome to do so), but your DCS 1 small group facilitators will have the opportunity to review and provide comments.

**10. First years doing LPP have a presentation in DCS 1 small group in the Spring:** This will take place in the spring semester in the DCS 1 small groups. You will be given 5 minutes to present a patient from your LPP Office to your DCS small group. Please use the following to prepare your presentation.

**A. Case Selection:** The goal is for you to reflect upon an experience you had in LPP that was important to you in some way. Some ideas for selecting cases include a case that:

- Taught you something about patient care
- Represents the kind of cases you saw most
- Represents an unusual case
- Illustrates a problem-solving approach
- Let's you use your basic science knowledge when interacting with the patient
- Let's you use your education or counseling skills
- Illustrates the importance of using a population approach to medicine

## **B. Presentation format**: Limited to 5 minutes!

See appendix for an oral case presentation guide. At the conclusion of the presentation, give a 1 minute summary of why you chose this case and allow time for group discussion.

- 11. Gather the Complete History over the course of the semester: HPI, PMH, Meds, Allergies, FH, SH: We realize that performing a complete history for one patient, using all of the components at one time, is a skill that develops over time. It can also be time consuming. You will have a chance to do this in the hospital sessions next year. However, the LPP setting can be an excellent opportunity to start practicing this task. Observe your preceptor and how they manage to do a complete medical history on either patient they already know or new patients they are seeing for the first time. Observe the different approaches for these patients. Discuss with your preceptor setting up a patient for you to practice the complete history.
- 12. Perform a Health Maintenance/Disease Screening visit: Identify a patient who presents for a check-up (yearly health maintenance visit) and record on the 'Health Maintenance/Disease Screening Note' that follows in the appendix. Prevention and screening examples you may encounter include a well child visit, cancer screening, immunizations, high risk population screening (e.g. HIV testing for those with high risk behavior) or a variety of other issues (cholesterol, vision, hearing, dental, sun exposure). These visits will provide a basis for your DCS small group discussions. Review the health maintenance section on the patients EHR and observe how these screening indicators are recorded. Does the practice or the EHR have built in reminders to alert the provider or patients when something is due?
- **13. Demonstrate counseling skills with a patient:** You can discuss this with your preceptor to help find a patient that might need counseling to help change a behavior (e.g. smoking, diet, or exercise). You can utilize the skills you will learn in the spring semester in your DCS1

small groups on the 5 A'a of counseling and motivational interviewing. You may want to role play this with your preceptor first before trying with a real patient.

- 14. Demonstrate components of the physical exam: You will be introduced to physical exam skills in the Physical Diagnosis course which runs from November through February (vitals, HEENT, heart, lung abdomen, musculoskeletal, Neurological). However, be prepared with your stethoscope at your first visit. Your preceptor will likely introduce the physical exam early in your sessions so be prepared and take advantage of this clinical setting to practice your exam skills. Your preceptor may use different techniques from what you are learning in the physical diagnosis course. Also, discuss with your preceptor how they decide what exam to do? Is it a focused exam based on the HPI or the patients' medical history? Is it a yearly physical exam so all exam components are performed?
- 15. Develop and Discuss Problem List (list findings or group findings), Assessment and Plans: As you progress through the year start working on this with your preceptor and complete these details on at least one patient per session. This is your opportunity to use critical thinking skills, i.e. putting it all together in terms of what the patient's problems are, how to evaluate them and how to treat them. Ask your preceptor to review with you. Ask how your they use the problem list. To help you problem solve a case, you may want to first list your findings and then group common elements so you can better understand what is going on and how best to develop an assessment and plan. These concepts will also be reviewed in your DCS 1 small groups.

# 2019-2020 EVALUATION/GRADING

The following components are used to determine the LPP grade and are **required to pass.** You must receive a passing LPP grade in order to receive credit for the DCS course (The LPP accounts for 20% of your Doctoring and Clinical Skills (DCS) course grade).

#### LPP REQUIREMENTS DUE MAY 2020

- 1. Attend 11 Preceptor Sessions; submit via OASIS 11 Checklists one for each session, completed at the end of each session
- 2. Review LPP1 Objectives Guideline
- 3. Preceptor Evaluation (due in March)
- 4. Self-Evaluation (due in December)
- 5. Complete a Reflective Write-up (due 1/31/20 via email submission to the <u>LPP@umassmed.edu</u> mailbox, but feel free to turn in early. These will also be distributed to DCS-1 small group leaders. Be sure to list your name and class year in the subject line.)

You must receive a passing LPP grade in order to receive credit for the DCS course. Failure to have assignments completed will result in a **No Credit** grade. All coursework for DCS and its components (LPP checklists, evaluations, reflection) must be completed by **May 22, 2020** in order for you to move to Year 2. If you have not completed the assignments, you will receive a No Credit for the course.

If you have requested an extension in writing, you will receive a temporary grade of Incomplete until your outstanding assignments are turned in. Request for extensions may be made to LPP@umassmed.edu in writing or by email by **May 1, 2020**.

# **APPENDICES**

Notes about the medical history that you will find helpful and should refer to frequently!

## WHY DO PEOPLE GO TO THE DOCTOR?

There are many reasons why people go to the doctor. In addition to the traditional "sick" visit, people also seek their physician for follow-up of chronic problems, and health maintenance. These visit types differ based upon patient age and sex. It is important to understand the physician's responsibility for their patients' health besides providing care when they are sick.

The following charts are a guide to understand why people go to the doctor, while not meant to be comprehensive – they provide an outline for what you will see in your preceptor's office.

<u>CHILDREN</u>	ADULTS
1) Sick Visits	1) Chronic Problem
2) Health Maintenance/Screening (check-ups)	2) Sick Visits
3) Chronic Problems	3) Health Maintenance/Screen (check-ups)

Adults are seen more commonly for chronic problems - children more for sick visits and 'check-ups'.

#### 'SICK' VISIT examples

<u>CHILDREN</u>	<u>ADULTS</u>
1) Fever	1) Upper Respiratory infection
2) Otitis media/upper respiratory infection	2) Musculoskeletal injuries
3) Gastrointestinal distress	3) Gastrointestinal distress
4) Injuries	

#### CHRONIC DISEASE FOLLOW-UP VISITS

<u>CHILDREN</u>	ADULTS
1) Asthma	1) Hypertension
2) Neurodevelopment problems	2) Diabetes
	3) Psychiatric Conditions
	4) Asthma/COPD(Chronic obstructive
	pulmonary disease)

### HEALTH MAINTENANCE / DISEASE SCREENING VISITS

<u>INFANTS/CHILDREN</u>	ADULTS
1) Immunization	1) Cancer Screening
2) Growth and Development	2) Chronic Disease Screening, (Hypertension, Diabetes, Hypercholesterolemia)
3) Safety Issues	3) Substance Abuse
4) Substance Abuse (Adolescents/Teens)	

# **Outline of the Complete Medical History and Write-up**

## I. Chief Complaint (CC)

## II. History of Present Illness (HPI)

- A. 7 Cardinal Features of the presenting symptom (CC)
  - 1. Quality
  - 2. Location
  - 3. Chronology
  - 4. Setting and Onset
  - 5. Severity
  - 6. Modifying Factors
  - 7. Associated Symptoms

<u>Include Pertinent Positives</u> - a symptom, risk factor or risk behavior associated with pathological conditions presenting with such a chief complaint *which is present* in the patient.

<u>Include Pertinent Negatives -</u> a symptom, risk factor or risk behavior associated with pathological conditions presenting with such a chief complaint <u>which is absent</u> in the patient.

## III. Past Medical and Past Surgical History (PMSH)

- A. Medical Illnesses/ Hospitalizations
- B. Surgical History
- C. Psychiatric History
- D. Childhood Illnesses
- D1. (Add Birth and Developmental History to a Pediatric History)
- E. Injuries
- F. Medications
- G. Allergies
- H. Transfusions
- I. Pregnancies

# IV. Social History/Habits and Risk Behavior

- A. Birthplace
- B. Education
- C. Work and Work History including exposure to hazardous materials
- D. Marital/Relationship Status
- E. Quality/Quantity of Social Relationships
- F. Diet
- G. Exercise
- H. Tobacco Use
- I. Alcohol Use
- J. Drug Use
- K. Sexual Behaviors History
- L. Domestic Violence
- M. Injury Prevention (seat belts, bicycle helmets, etc.)

# V. Family History

A. Significant **Illnesses** in 2-3 generations of family – Document -

Ages and health status of siblings

Ages and health status of parents

Ages and health status of grandparents

Ages and health status of children

- B. Ask about Common **Diseases** with known genetic links
  - 1) familial incidence of arthritis, cancer, diabetes, hypertension, myocardial infarction, stroke, mental illness, alcoholism
  - 2) any other illness that runs in the family

# VI. **Health Care Maintenance** (Prevention and Screening)

- A. Cancer Screening
- B. Immunizations
- C. High Risk Population Screening (e.g. HIV testing for those with high risk behavior)
- D. Other (cholesterol, vision, hearing, dental, sun exposure)
- E. Health Care Proxy

# VII. Review of Systems (ROS) A Constitutional B Skin

A.	Constitutional	В.	Skin
C.	Head	D.	Eyes
E.	Ears	F.	Nose
G.	Mouth	H.	Throat
I.	Breasts	J.	Respiratory
K.	Cardiovascular	L.	Gastrointestinal
M.	Urinary	N.	Genital
O.	Menstrual-Reproduc	ctive P.	Endocrine
Q.	Musculoskeletal	R.	Hematological
S.	Nervous System	T.	Psychiatric

#### COMPONENTS OF THE MEDICAL HISTORY DESCRIBED

**I. Chief Complaint (CC):** The patient's stated reason for the medical encounter

**II. History Present Illness (HPI):** Characterize the chief complaint according to the principles of interviewing that you learned in the Physician Patient and Society course. This includes the 7 cardinal features of the symptom (quality, location, chronology, associated symptoms, modifying factors, setting and onset, and severity) as well as asking all questions in the past medical history (PMH), family history (FH), social history (SH) and review of systems (ROS) that directly relate to the chief complaint. Therefore, if a patient is experiencing shortness of breath, you should characterize the complaint and then include any pertinent PMH, FH, SH, and cardiorespiratory review of systems in your HPI since most causes of SOB can be traced to these two systems. Therefore, at the end of the HPI, it is worthwhile to ask yourself: "have I characterized the chief complaint and asked the relevant questions from the appropriate past medical history, family history, social history and review of systems"?

The HPI is the most demanding part of the history. It details completely and concisely all of the features of the illness or symptom complex that brought the patient to the hospital or the physician's office. It should be detailed in chronological order and in literate fashion so that details and time sequence are understandable to the reader. This is a task of potentially extraordinary complexity. It requires that you get the full details as outlined above, as well as the care that the patient has sought for the symptoms, diagnostic tests performed, physician's and patient's impressions of the symptoms and the plan that has been outlined thus far.

While not expected for this course work, keep in mind during the time that you are doing clinical rotations, you will also be asked to review previous medical records to supplement the information that the patient has given you and confirm the details of the tests that the patient has had leading up to the hospitalization. While this list of questions and issues that need to be addressed seem to be daunting, they can all be seen as a part of the time course of the illness for which the patient presents.

Events should be related temporally but attention should be paid to the avoidance of skipping back and forth between the details of symptoms in different organ systems. If a patient has an illness that has multiple symptoms from different organ systems, it is often helpful to detail the symptoms separately followed by their time course, features, pertinent positives and negatives. In addition, if the patient has had multiple episodes of a symptom complex or multiple exacerbation's of one disease, it is often helpful to get the full details of a typical episode, record the frequency of episodes and record how the current episode may differ from a typical episode if it does.

There clearly is judgment involved in deciding whether an item belongs in the HPI. A rule of thumb is to include all the symptoms from the Review of Systems in which the patient's chief complaint falls as well as any diseases that relate to that system. As you take the history and form ideas or hypotheses about what disease entities that the symptoms might represent, be careful to then include questions from the systems that these diseases involve. This requires that you begin to integrate the knowledge that you have gained in the Pathophysiology course with the symptoms that the patient reports to you. You should not include the details of illnesses that are not related to the HPI here as this information belongs in the PMH.

III. Past Medical History (PMH): In this section, you should detail the patient's previous medical and surgical problems. To be included in this section, it should be a clear diagnosis, not only a symptom or symptom complex. In addition, if a patient tells you that they have had a certain disease; you should typically ask about the presenting symptoms, diagnostic tests used to arrive at the diagnosis, and subsequent course of the disease. This information allows you to include only clearly established diagnoses. The more varied that the disease presentation can be, the more critical it is that you record the details completely. You can use a short hand method of recording the PMH/PSH by listing the diagnosis followed by the date that the diagnosis was made and the details that you have collected. An example is given below.

- a. Essential Hypertension 1986, diagnosed on routine PE, without complications, treated with ACE Inhibitor, Vasotec
- b. Systemic Lupus Erythematous 1989, presenting with diffuse arthralgia and arthritis as well as skin rash, diagnosed clinically and treated with Naprosyn for his/her joint pain

Also included in this section are numerous subheadings that pertain to previous problems or health history. These include:

- a. Past Illness (examples above)
- b. Past Surgeries
- c. Childhood Illnesses
- d Injuries
- e. Immunizations
- f. Allergies (include a description of the reaction)
- g. Transfusions
- h. Pregnancies
- i. Medications include doses and frequency

**IV. Family History (FH):** Diseases that can be inherited are a critical part of the history. You should record the health status and health problems, concentrating on those that are known to have genetic links, of the patient's grandparents, parents, siblings and children. If any of these persons are deceased, record the cause of death and the age at which that occurred. While history of the grandparents may be hard to obtain, it is important to attempt to get information for at least two generations of the family that have lived long enough to get heritable diseases. This can be recorded in long hand or in family tree format being sure to identify which one is the patient if a family tree is used. In addition to whatever format is being utilized, you should also ask about the major disease categories that are known to have genetic links such as Diabetes Mellitus, Hypertension, Myocardial Infarction, Stroke, Arthritis, Asthma and Cancer.

**V. Social History (SH):** This section should attempt to detail prominent features in the life of the person that you are examining. It should include a comment on where the person was born, when and how they came to be in their current community, their marital status, current work, some comment on the quality and quantity of their social relationships and their means of emotional support. By convention, this is the section of the write-up where the smoking history, alcohol history, sexual history, and drug use history are recorded.

VI. Review of Systems (ROS): This is a systematic, comprehensive review of multiple symptoms that the patient may have experienced. The areas that you have to question can be conveniently grouped according to the pathophysiological system in which they fall. A list of systems follows this section. There are several critical items that need to be mentioned with regard to the recording of the ROS in the write-up. If a patient tells you that they have experienced a certain symptom, pursue that positive answer to determine whether it is a current problem, an acute problem that will need attention during this visit, or a fleeting or past problem that does not require attention at all. Do not simply record that symptom as "positive." Conversely, it does not suffice to describe a whole system as negative while not recording the items that you asked the patient. This is the case because recording the system as negative does not adequately characterize what items you asked the patient about. This is generally referred to as "pertinent positive" and "pertinent negative" review of system as applied to the chief complaint.

**A NOTE ABOUT TIMING** - ROS questions are asked in many situations. It is important to be clear why you are asking them, and what time period you want the patient to consider in answering the question. If the patient is an outpatient who you will follow over time, you are really asking whether a patient has had significant symptoms recently (and in some circumstances like hemoptysis or sudden

asymmetric weakness or loss of consciousness, ever), and then pursuing enough detail to determine whether you might be able to make a diagnosis or need to do some tests, or be aware of these symptoms for a later visit. If the patient is an inpatient who you will follow during the hospitalization, your question really has to do with whether the patient has experienced symptoms in ROS recently, and significantly enough that you need to focus on it (either testing or treatment) during this hospitalization. You are not asking whether a patient has ever had a rash, or ever had epistaxis (bloody nose) or heartburn

What follows is a list of questions from various organ systems that should be addressed in the ROS.

- 1. **CONSTITUTIONAL SYMPTOMS:** Fever, night sweats, chills, fatigue, anorexia, insomnia, weight change, weakness, irritability.
- 2. **SKIN:** Change in moisture, temperature, color or texture, lesions, rashes, itching, bruising, bleeding disorders, changes in hair or nails.
- 3. **HEAD:** Change in head size, headache, trauma.
- 4. **EYES:** Vision changes, glasses, blurring, eye pain, diplopia (double vision), scotomata (blind spots), flashes of lights, injury, irritation, discharge, photophobia, excessive tearing.
- 5. **EARS:** Hearing loss, pain, infections, discharge, tinnitus, vertigo.
- 6. **NOSE:** Dryness, bleeding, pain, discharge, coryza, epistaxis, obstruction, sinus pain, change in smell.
- 7. **MOUTH:** Condition of teeth, pain in mouth or tongue, bleeding gums, lesions in mouth, tongue or lips.
- 8. **THROAT:** Soreness, hoarseness, dysphagia.
- 9. **BREASTS:** (both sexes) Pain, swelling, discharge, masses.
- 10. **RESPIRATORY:** Cough (acute or chronic), sputum production, hemoptysis, dyspnea, wheezing, chest pain, pleurisy, orthopnea.
- 11. **CARDIOVASCULAR SYSTEM:** Chest pain, exertional dyspnea (shortness of breath), paroxysmal nocturnal dyspnea, orthopnea, palpitations, syncope, peripheral edema, cyanosis, murmur, intermittent claudication, Raynaud's phenomenon, varicose veins, phlebitis.
- 12. **GASTRO-INTESTINAL TRACT:** Dysphagia, odynophagia, appetite, heart burn (acid indigestion), eructation (belching), regurgitation, bloating, abdominal pain or discomfort, fullness, distention, pain, nausea, vomiting, hematemesis, jaundice, bowel habit change, rectal pain, hemorrhoids, hernia, hematochezia, melena, diarrhea, constipation.
- 13. **URINARY SYSTEMS:** Dysuria, frequency, urgency, polyuria, nocturia, incontinence, flank pain, hematuria, retention, dribbling, hesitancy, poor stream, back or costovertebral angle (CVA) tenderness.

#### 14. GENITAL SYSTEM:

- a. Gynecological: discharge, itching, genital lesions
- b. Male Genitalia: pain, lumps, urethral discharge, testicular pain or swelling
- c. Sexual Problems: dissatisfaction, dyspareunia, potency, recent change in pattern.
- 15. **MENSTRUAL-REPRODUCTIVE HISTORY:** Dysmenorrhea, intermenstrual bleeding, changes in cycle, amenorrhea, menorrhagia, metrorrhagia. Peri-menopausal symptoms like hot flashes, sweating, post-menopausal bleeding. Emotional reaction to menarche and menopause.
- 16. **ENDOCRINE SYSTEM:** General (weight change, easy fatigue, behavioral changes), thyroid disease (goiter, heat or cold intolerance, sweating, exophthalmos, tremor, skin and hair changes), diabetes (polyuria, polydipsia, vaginal discharge and itching, skin infections), pituitary disease (change of facial features, hands, feet). Secondary sex characteristics, habitus, hair distribution. Impotence, libido, sterility.
- 17. **MUSCULO-SKELETAL SYSTEM:** Bone pain, tenderness, swelling, stiffness, limitation of movement of neck, trunk, extremities. Weakness. Trauma, fracture. Swelling backache and leg cramps.
- 18. **HEMATOLOGICAL:** Lymph node enlargement, pain, bleeding, bruising.
- 19. **NERVOUS SYSTEM:** Syncope (faint), dizziness, convulsions, vertigo, difficulty with speech or swallowing, localized or generalized symptoms, tremor, weakness, pain, numbness, paresthesia, incoordination, difficulty with bladder or bowel control.
  - a. Cranial nerve symptoms: change in smell, Diplopia, change in vision, blind spots, difficulty with speech, swallowing, or chewing, facial numbness or drooping, change in hearing, tinnitus
  - b. Motor system: paralysis, atrophy, involuntary movements, seizures, gait, incoordination
  - c. Sensory system: pain, paresthesia, hyperesthesia, anesthesia
  - d. Mentation: orientation, memory. Reading and writing. Loss of consciousness.
- 20. **PSYCHIATRIC:** Rapid changes in mood, memory loss, phobias, hallucinations, sleep disturbances, problems with coping, suicide, (attempts or thoughts), anhedonia, frequent crying

## **Review of Systems - Lay terms**

GENERAL: Any problems with your sleep? energy level? appetite? Any recent change in your weight? Any fever, chills? Any problem with excess thirst? Does the heat or cold bother you more than it bothers most people?

SKIN: Any problem with your skin...itching, bruising, growths? changes in moles or a freckle? Any problem with skin moisture...too dry, too oily?

HEAD: Any problem with headaches, dizziness, blackouts?

EYES: Do you have any trouble with your vision? blurred vision? double vision? Do you ever see spots or flashes? Any problem with discharge, redness, itchiness, or tearing?) Do bright lights bother your eyes?

EARS: Do you have any difficulty with your hearing or ringing in your ears? pain in your ears? itching? drainage? Do you have any difficulty with dizziness? a sensation that the room is spinning around you?

NOSE/THROAT/MOUTH: Any mouth or throat problems...hoarseness, difficulty swallowing, pain, or swelling? Any problems with your teeth or gums?

BREASTS: Any problems with pain, swelling in your breast? Any discharge? lumps?

RESPIRATORY: Do you get short of breath or have pain with breathing? Do you get short of breath with activity? Do you ever wheeze? Do you ever wake up at night short of breath? (Can you go up one/two flights of stairs without stopping? Would you have to stop to catch your breath at the top?) Do you cough up phlegm or blood?

CARDIOVASCULAR: Do you ever have chest pain? Do you ever wake up in the middle of the night short of breath? Have you increased the number of pillows that you sleep on to help you breath at night? Do you have skipped or rapid beating of your heart? Have you ever passed out? Do you have a problem with swelling or cramping in your legs? Have you ever noticed a color change in your fingers or toes when exposed to cold temperature? Do you have varicose veins

GI: Do you ever have trouble swallowing or painful swallowing? Any problems with heart burn? Have you been sick to your stomach? Have you vomited? ever vomited blood? Do you have belly pain, cramps or bloating? Any problems with bowel movements? (Diarrhea? Constipation? Noticed any blood in your stools or black or tarry stools.

GU: Do you have any problems with urination? (Any burning when you pass your urine? Are you passing urine more frequently? When you feel the urge to urinate, do you feel like you have to go right away? Is the force of your urine stream as strong as it always was? Do you have incontinence...trouble controlling your urine?) Do you have or have you had blood in your urine?

#### **GENITAL SYSTEM:**

- a. Gynecological Do you have any vaginal discharge, itching, growths or lumps?
- b. Male Genitalia Do you have any discharge from your penis? pain, lumps, or growths? testicular pain or swelling?
- c. Sexual Problems Are you satisfied with your sexual function? What difficulties do you have, if any? Has your desire for sexual activity changed recently? Do you have pain with intercourse?

MENSTRUAL-REPRODUCTIVE HISTORY: Do you have any difficulties with your periods? pain? bleeding between periods? irregular cycles? intervals without periods? heavy bleeding? prolonged periods? Have your periods stopped? Are you having any hot flashes or sweating as your periods are changing? bleeding after menopause completed? Do you have any emotional reactions to beginning (menarche( or ending your periods (menopause)?

ENDOCRINE SYSTEM: Do you have any change in weight? energy level? unexplained changes in behavior? Any neck growths? feelings of warmth or cold when others are not? excessive sweating? eye bulging? shaking of your hands that is not voluntary? loss or thinning of hair? Any excessive thirst? frequency of urination? Any change in facial features/appearance? size of hands or feet? Any loss of pubic hair? hair growth in locations you haven't had it before?

MUSCULO-SKELETAL SYSTEM: Do you have any bony pain? tenderness? joint pain? swelling? or stiffness? Do you have limited movement of any joint or in neck/back that seems greater than others? Do you have any weakness? back pain?

HEMATOLOGICAL: Do you have any lumps in your neck? under your arms? or in your groin? History of bleeding or bruising?

NERVOUS SYSTEM: Do you have any fainting, dizziness, convulsions/seizures or "fits"? difficulty with or change in speech? swallowing? hand or head shaking that isn't voluntary? localized weakness, pain, numbness or tingling? difficulty with balance? bladder or bowel control?

- a. Cranial nerve symptoms Do you have any change in smell? vision (double vision, blurry vision?) speech, swallowing, chewing? Any drooping of the face or eyes? change in hearing? ringing or buzzing in your ears?
- b. b. Motor system Any paralyzed part of the body? loss of muscle bulk? involuntary movements? difficulty with walking? coordination?
- c. Sensory system Any pain, numbness, tingling, or increased sensitivity of a body part?
- d. Mentation Any change in your thinking? sense of where you are? your memory? reading or writing ability?

PSYCHIATRIC: Any change in mood? new fears/phobias? Do you ever see or hear things that aren't there? Do you have any difficulty sleeping? coping with life stresses? feelings about ending your life? plans to end your life? Do you cry frequently and for no reason? Do you no longer get pleasure from things that used to give you pleasure?

## GUIDELINES FOR ORAL PRESENTATIONS (for case-type presentation) for DCS 1

<u>Chief Complaint/Opening Line/Orienting Statement, includes</u> identifying information and the chief complaint

HPI-should reflect the chief complaint, its features (7 cardinal features)

You should at least detail:

- 1. The seven cardinal features of the presenting symptom.
- 2. PMH that could be related to diseases that present with the chief complaint
- 3. FH that could be related to the chief complaint
- 4. SH that could be related to the chief complaint
- 5. Summary statement
  - a. Must start with pt demographics (Gender, Age) and end summary sentence with as much of a "commitment" your proposed diagnosis as you are able to give at your level of training.

<u>Chief Complaint/Opening Line/Orienting Statement, includes</u> identifying information and the chief complaint (see opening line notes below, <u>which chiefly pertain to DCS2</u>)

Your <u>opening line</u> will vary depending on the audience, the situation, and the purpose of the presentation. It should orient the listener to key elements of the chief complaint and how it relates to the broader case. Consider the following situations.

- 1. In a new patient who presents with symptoms of cough, you should make sure that the chief complaint is in the first sentence of your presentation. "This is a 32 year old man who presents to the hospital with shortness of breath and cough."
- 2. You do not need to present all the details of the Past Medical History in the first line of the presentation, but you should consider whether some aspects of the medical history would influence the listener's thinking and is **so** important that you should include it in the first sentence. For example, one would think differently if the opening line of the presentation above were: "This is a 32 year old man with a 12 year history of HIV infection and progression to AIDS who now presents with shortness of breath and cough."

HPI-should reflect the chief complaint, its features (7 cardinal features)

You should at least detail:

- The seven cardinal features of the presenting symptom.
- Pertinent Review of Systems (ROS questions from the system(s) in which chief complaint may fall)
- PMH that could be related to diseases that present with the chief complaint
- FH that could be related to the chief complaint
- SH that could be related to the chief complaint
- Condition specific data- detailed (disease based) information about specific conditions that don't fit into above categories (nausea in patient with headache is something that you likely need to think of migraine or elevated intracranial pressure which then makes you ask and then report on nausea.)

NOTE: Risk factors for disorders that could present with the chief complaint is a broad term that includes items from many of the above categories (something from the PMH, FH, SH, or medications that makes a particular diagnosis more likely, i.e. heavy drinking from SH or aspirin from medications are risk factors for a bleeding ulcer. FH of MI or PMH of HTN are risk factors for MI).

NOTE: Collectively, the information beyond the 7 cardinal features represents **pertinent positives** (pertinent positive is a symptom, risk factor or risk behavior associated with pathological conditions

presenting with such a chief complaint that is present in the patient) and **pertinent negatives** (pertinent negative is a symptom, risk factor, or risk behavior associated with pathological conditions presenting with such a chief complaint that is absent in the patient). The pertinent positives and negatives depend on your knowledge of pathophysiology.

<u>Medications\*</u>-list the medication and doses that the patient is taking.

Allergies\*-list agent and type of reaction.

By the end of the HPI presentation, the listener should have some idea of the diagnostic possibilities that you are considering.

\*Some advocate for presenting Meds/allergies in all patients to encourage you to think about whether meds or allergies could be related to HPI

#### **Summary statement**

- Must start with pt demographics (Gender, Age)
- Most pertinent PMH, FH, SH, i.e. if is is immediately related to the chief complaint
- End summary sentence with as much of a "commitment" to your proposed diagnosis as you are able to give at your level of training. For instance, in the case above, you may say "32 year old male with a 12 year history of AIDS who now presents with fever and cough (will add physical exam and labs as you perform more complete exams), suspicious for PCP pneumonia". You may only be able to narrow down your most likely diagnosis after the history and physical (you will likely be doing more, i.e. labs, XRAYs, to further clarify). For instance, "18 month old full term male with 2 days of cough and wheeze, and now 1 day of increased work of breathing, consistent with either asthma or bronchiolitis"
- Do not have your summary statement be a rehashing of the HPI!

#### **Adaptations for the Complete Presentation**

If oral presentation is a complete presentation of a full History and Physical (like you will perform in DCS2 Hospital sessions and in the clinical years), you will present full details of PMH, Meds/All, FH, SH, ROS in more complete fashion, but with less detail than information from these categories that are related to the HPI

<u>Review of systems</u>-for the presentation; you should only give those positive symptoms that will need to be addressed during the admission or at the end of the outpatient visit.

<u>Physical Examination</u>-patient's general appearance (uncomfortable appearing woman in respiratory distress), a complete set of vitals, all parts of the exam that could have abnormalities produced by diseases that are on your differential.

# PROBLEM LIST, ASSESSMENT AND PLAN

After you have written up a complete history, ROS, physical exam, and labs, the problem list, assessment and plan is what comes next.

Below is a description and examples for each component.

#### **Problem List**

Those issues which the patient and/or you identify as concerns. These may be physical, psychological or social. There may be several at each visit.

#### Example:

- 1. Chest pain
- 2. Weight gain
- 3. Tobacco Abuse

#### Assessment

This is what you think is causing the problem (i.e. the diagnosis) or a list of multiple possible causes (i.e. the differential diagnosis).

#### Example:

- 1. Chest pain atypical in nature, heartburn-like, occurring only supine easily relieved with antacids. Differential diagnosis includes: GI probably GERD, most likely because of previous mentioned characteristics, musculoskeletal still most likely GI but given chest wall tender to palpation on exam suggests component of costochondritis (inflammation of joint spaces between sternum and ribs) as well, cardiac but less likely because no significant risk factors and atypical pain, pulmonary very unlikely, no symptoms referable to this system.
- 2. Weight gain patient does not watch diet or exercise regularly. (note not a diagnosis but a description of the cause)
- 3. Tobacco abuse long-time smoker, does not want to quit. (note not a diagnosis but a description of the pattern)

#### Plan

This is what you are going to do about each problem. This includes diagnostic test, if indicated, and treatment.

#### Example:

- 1. Chest pain
  - -start H2 blocker
  - -call in 2 weeks to report progress
  - -will hold NSAIDS for now for costochondritis till reflux improved
  - -followup as indicated, may need UGI if no significant improvement with H2 blocker
- 2. Weight gain
  - -patient interested in starting weight watchers, encouraged to do so
  - -patient agrees to daily walking program of twenty minutes
  - -return visit 3 months
- Tobacco abuse
  - -long discussion with patient regarding importance of quitting, patient unwilling to quit at this time,
  - will discuss at future appointments

Put it all together and it looks like this:

- 1. Chest pain atypical in nature, heartburn-like, occurring only supine, easily relieved with antacids. Differential diagnosis includes: GI probably GERD, most likely because of previous mentioned characteristics, musculoskeletal still most likely GI but given chest wall tender to palpation on exam suggests component of costochondritis (inflammation of joint spaces between sternum and ribs) as well, cardiac but less likely because no significant risk factors and atypical pain, pulmonary very unlikely, no symptoms referable to this system
  - -start H2 blocker
  - -call in 2 weeks to report progress
  - -will hold NSAIDS for now for costochondritis till reflux improved
  - -followup as indicated, may need UGI if no significant improvement with H2 blocker
- 2. Weight gain patient does not watch diet or exercise regularly
  - -patient interested in started weight watchers, encouraged to do so
  - -patient agrees to daily walking program of twenty minutes
  - -return visit 3 months
- 3. Tobacco abuse long-time smoker, does not want to quit
  - -long discussion with patient regarding importance of quitting, patient unwilling to quit at this time, will discuss at future appointments

H2 Blockers – acid blocking medications such as ranitidine (Zantac)

GI - gastrointestinal

UGI – upper gastrointestinal series – x-ray study to rule out ulcers or gastritis

GERD – Gastroesophageal reflux disease

NSAIDs – non-steroidal antiinflammatory drugs – such as ibuprofen (Motrin, Advil).