Chapter 3: Client Processes
Section 3: Assessment
Lesson: Health History

Objectives:

Upon completion of this lesson the user will be able to:

- correctly select and complete appropriate questionnaires;
- interview clients using the health history questions; and
- demonstrate how the CPA reviewed field is correctly used.

Oregon Policies:

- ♦ 450 Confidentiality
- ♦ 625 Nutritional Risk Assessment
- ♦ 640 Documentation Requirements

Overview:

In TWIST, the “Health History – Questionnaire” screen is one of the first steps used to determine nutrition and health status of a WIC participant. Information collected on this screen can be updated when needed and all historical information is available for you to review at the click of a button.

In this lesson you will learn how to select, complete, update and view health history information.

Instruction:

Completing the Questionnaire

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Health History

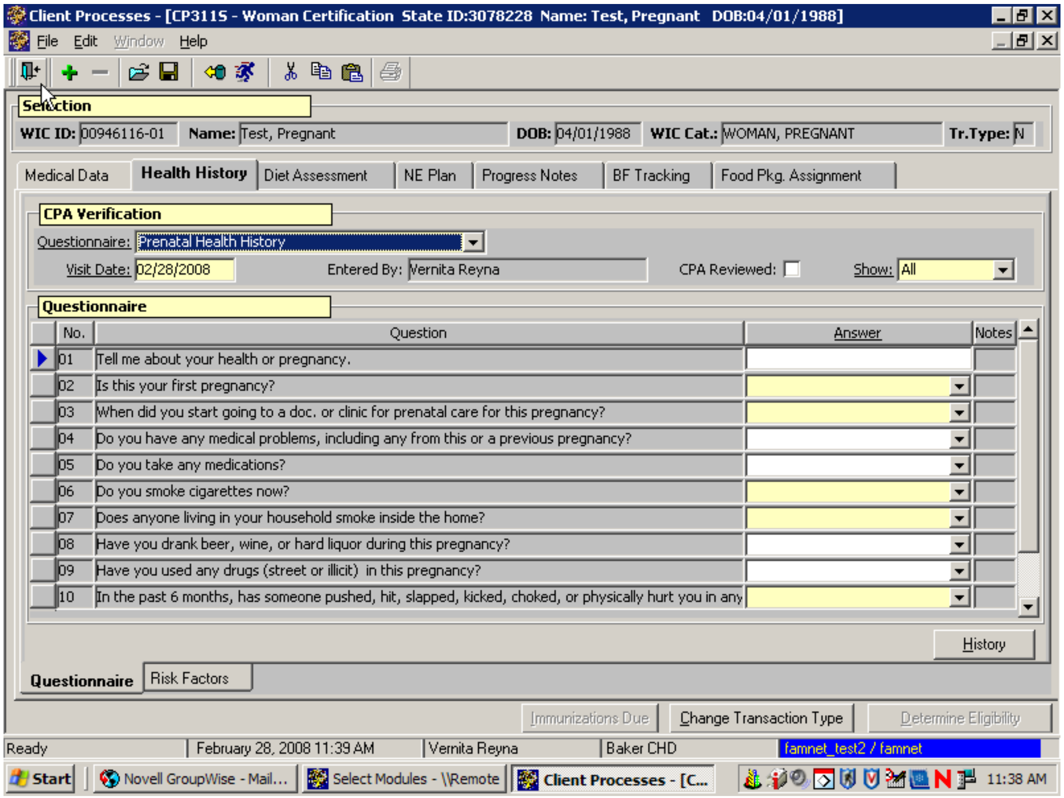

Figure 1: "Health History – Questionnaire" Screen

1. **Retrieve the client for whom you want to enter health history information.**

2. **From the "Questionnaire" field, select the appropriate questionnaire from the drop down list.**

3. **Tab to the "Visit Date" field.**

   - This field defaults to today's date but may be modified.
   - The "**Entered By**" field defaults to the current user based on their User ID.

4. **Tab to the "show" field.**

   - From this drop down menu you may select to display "**All**" questions or only "**mandatory**" questions.
   - The questions will be displayed in the "**Questionnaire**" section of the screen.

5. **Enter the appropriate answer for each question.**

- Click in the question field and scroll over to view the entire question.
- Clicking "**Ok**" will save the answers and close the pop-up.
- Clicking "**Cancel**" will close the pop-up.
- Risks may be generated based on answers entered.
- Certain answers may generate additional questions or pop-ups.

There are three types of answer possibilities:

- multiple choice; the answer is selected from the drop down list of answers.
- masked; the answer is entered in a specific format, such as a date.
- free-form text; the answer is typed in the answer box..

6. **Double click in the "Health History Notes" field.**

- This opens the "**Question Notes**" pop-up and allows you to enter a free form note, as needed.
- A note may be entered for each answer.

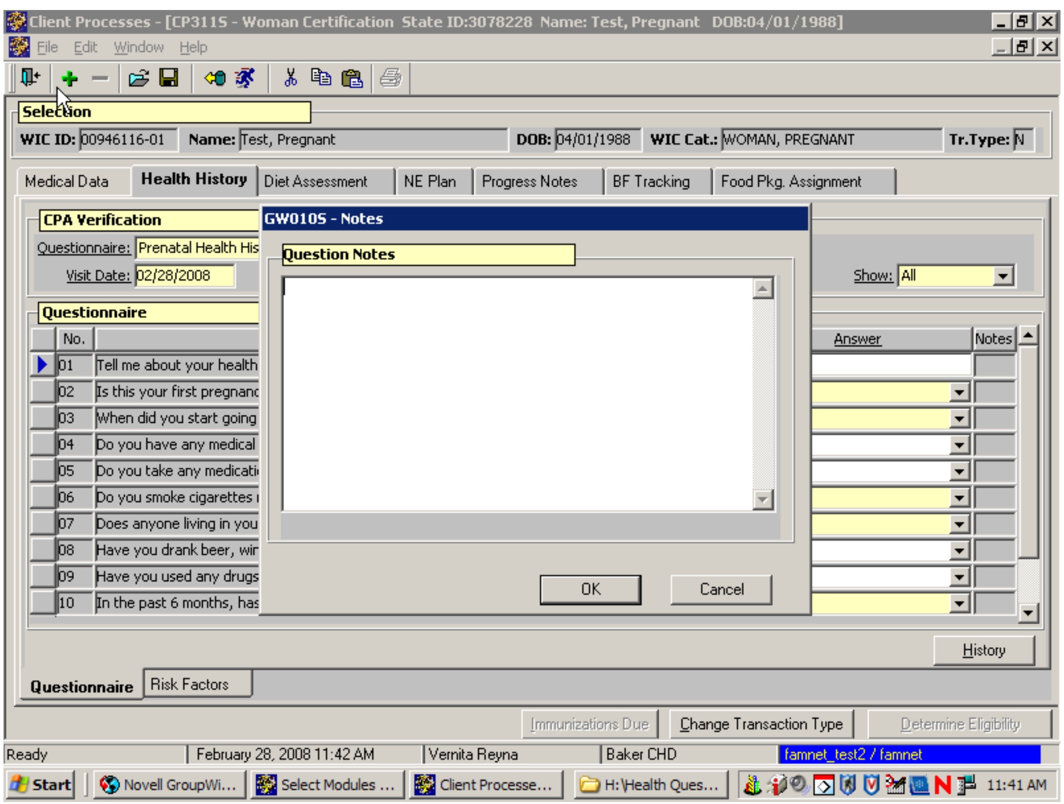

Figure 2: "Health History – Question Notes" Pop-Up

7. **Click “OK” to save the note and close the pop-up.**

   Clicking “**Cancel**” will close the pop-up without saving the note.

8. **View the “CPA Reviewed” checkbox.**

   - A Competent Professional Authority (CPA) must complete this checkbox.
   - If a non-CPA is entering answers to health history questions, a CPA must review the answers before checking the box.
   - The “**Health History**” screen will not be marked off as completed (blue check mark on tab) until this box has been checked and all mandatory questions are answered.
   - The tab can be saved without a CPA checkmark, but the tab will not receive the completed checkmark.

9. **Save.**

   The “**Health History**” tab will now have a checkmark.

➥ *Practice Activity #1:*

Use the information the client from your ☛ Activity Sheet.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Health History

1. Click the “Open” icon to access “Client Search” and select the client from your ☛ Activity Sheet.
2. Click the “Return with Client” button.
3. Select the prenatal health history questionnaire.
4. Leave “Visit Date” as today’s date.
5. Check the “CPA Reviewed” box.
6. Tab to the “Show” field and select All.
7. For the question “Do you have any medical problems?” select yes.
8. Assign Gestational Diabetes and close the pop-up.
9. Complete the rest of the questions.
10. Save your work.

Accessing Questionnaire History

Previous health history questionnaires can be viewed at any time by using the “**History**” button.

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Health History ⇨ Questionnaire

1. **Retrieve the client for whom you want to view health history information.**

2. **On the "Questionnaire" screen, click the "History" button.**

The "Questionnaire History" pop-up is displayed.

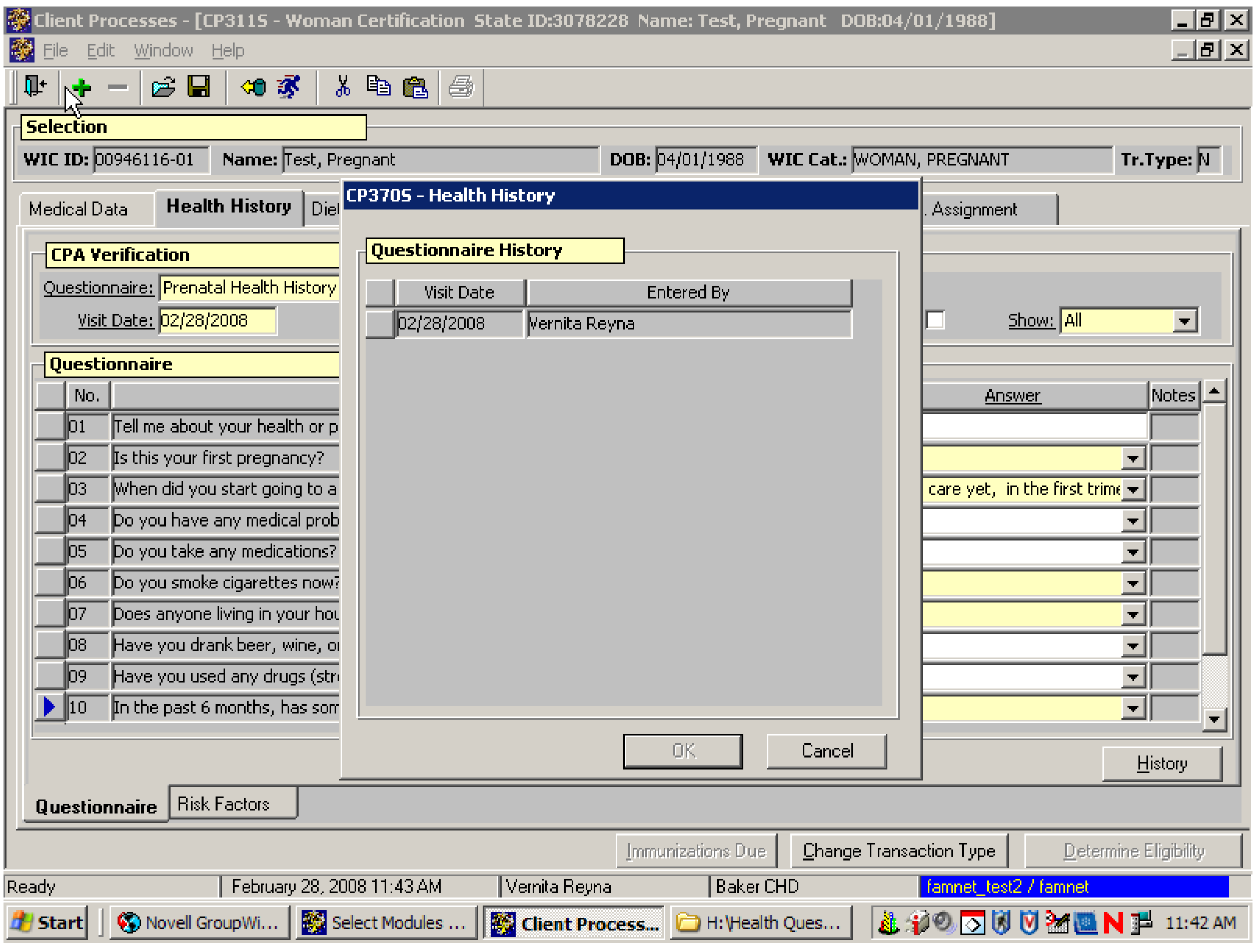

Figure 3: "Health History – Questionnaire – History" Pop-Up

3. **Select the questionnaire you want to view and click "OK."**

- The questionnaire is displayed.
- The questionnaire is view only and cannot be modified unless it was created today.
- To close the pop-up without selecting a questionnaire, click "**Cancel**."

- To view another questionnaire, click the "**History**" button and repeat the process.

4. **Exit the screen.**

➥ *Practice Activity #2:*

Use the information the client from your ☛ Activity Sheet.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Health History

1. Click the "Open" icon to access "Client Search" and select the client from your ☛ Activity Sheet.
2. Click the "Return with Client" button.
3. Click the "History" button.
4. Select the oldest "Visit Date" and click OK.
5. View the questionnaire.

✂ *Tips and Shortcuts:*

- After the questionnaire has been completed and saved you can view the risks by clicking on the "Risk Factors" tab.
- In order to get the medical conditions pop-up after the questionnaire has been completed, just change the answer back to "no," then change it again to "yes." This will bring the pop-up back again and allow you to change or make additional selections.
- You will be able to change answers to a questionnaire until the end of the day that the questionnaire was originally completed.
- To add a questionnaire (i.e.; for a follow-up visit), click on the "+" icon and select a questionnaire from the drop down menu.

✓*Skill Check:*

1. Find a partner for this Skill Check. You will be taking turns interviewing each other and entering answers on the "Health History - Questionnaire" screen.
2. Since you have already completed a Health History Questionnaire for yourself you will need to create a new pregnant client.
3. Using this new client, complete the "Health History - Questionnaire" screen for this pregnant woman as you interview your partner. Do a screen print of the completed questionnaire. Then switch, and allow your partner to interview you.

4. The client has come in for a Nutrition Education appointment. You’d like to view the original Health History Questionnaire from this certification. Find the questionnaire on TWIST and do a screen print.
5. Write your name on the screen prints and turn them into your instructor.

✍ Notes:

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