

# Optimizing Patient Histories in PM&R General Clinic with Intake Forms

Alpha Anders, MD; Mason Kay, MD; Arieen Loo Hernandez, DO; Zack Richard, MD; Brandon Savage, MD; Alex Thibadeoux, MD; Marc Raj, MD  
LSU Health

## Background

### Key HPI Components:

1. Onset
2. Location
3. Radiation
4. Duration of sx
5. Timing of sx
6. Character/quality
7. Aggravating factors
8. Alleviating factors
9. Severity
10. Previous treatments
11. Associated signs and symptoms.

- HPI is foundational in making the correct diagnosis
- Obtaining a thorough history can be time consuming
- Intake forms provide patients with time in the waiting room to express their chief complaint and related history
- Chart review of HPIs in the month prior to study revealed every note had at least one missing key component

## Objectives

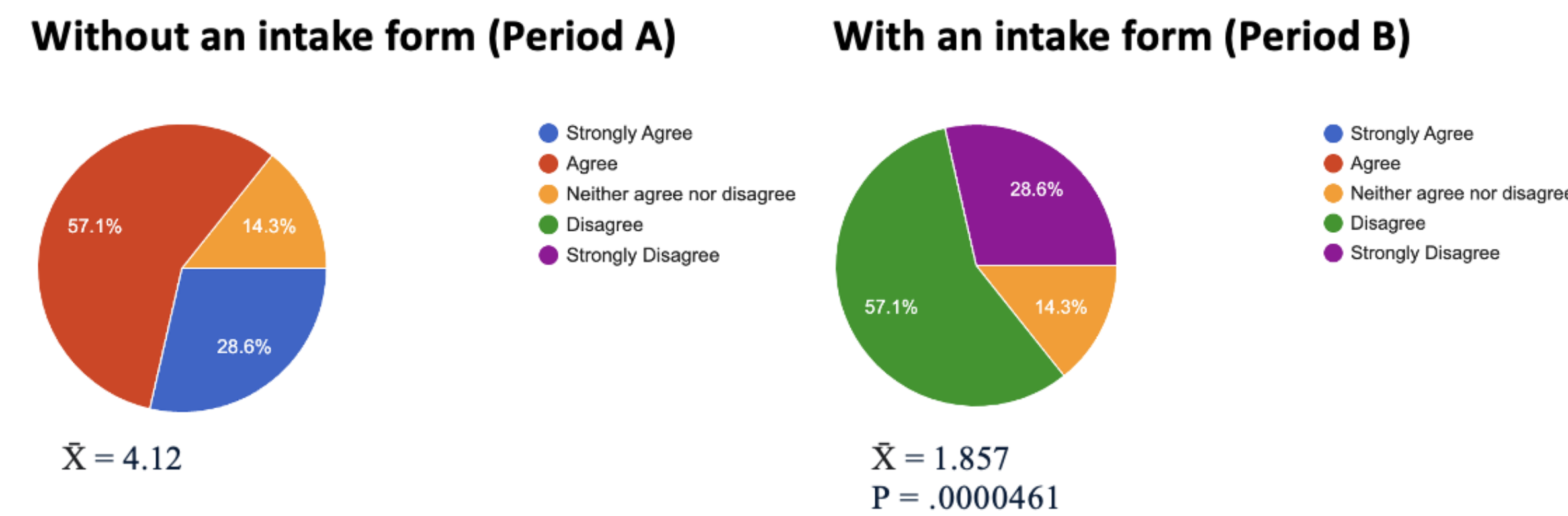
- Optimize history efficiency and thoroughness
- Reduce waste
  - Correct diagnosis
  - Correct treatment
  - Patient time and physician time
- Improve equity
  - Standardize history process

## Methods

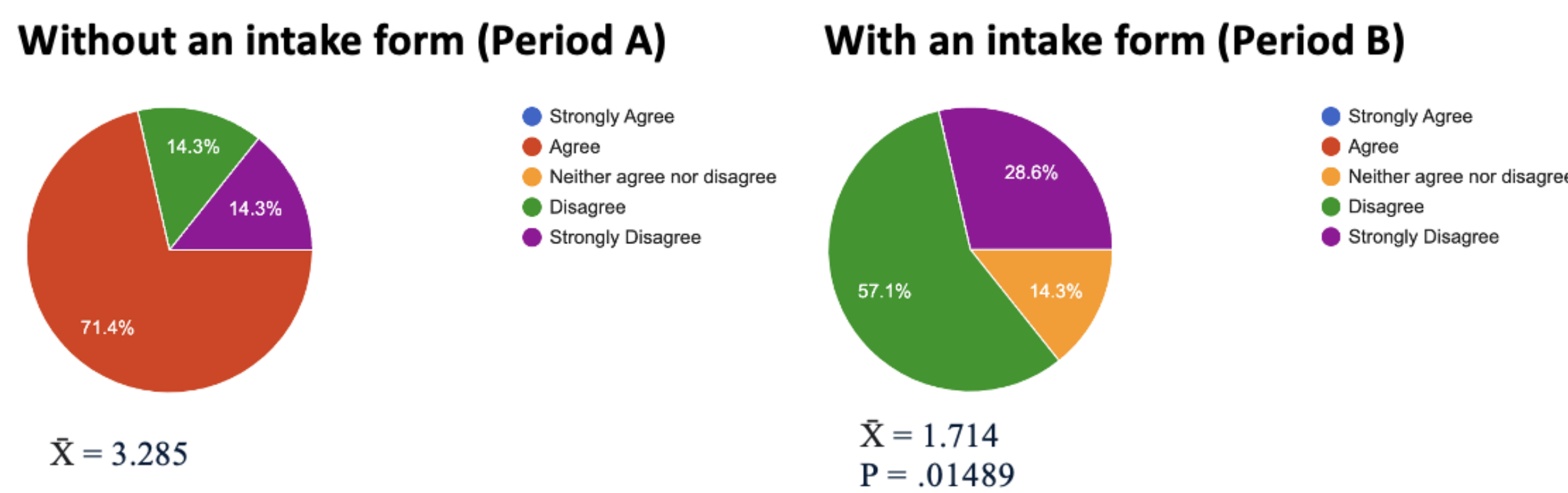
- Data gathered from January 2023- March 2023
- Inclusion: New patients, chief complaint of localized pain seen in Wednesday general PM&R clinic
- Each month separated into two periods
  - Period A: First and Second Wednesday
    - 30 Patients seen in period A
  - Period B: Third and Fourth Period
    - 26 patients seen in period B
- Completeness of documented histories
  - $\bar{X}$  Included HPI key components/note
  - $\bar{X}$  Missing HPI key components/note
- Resident Perception Via Survey

## Results

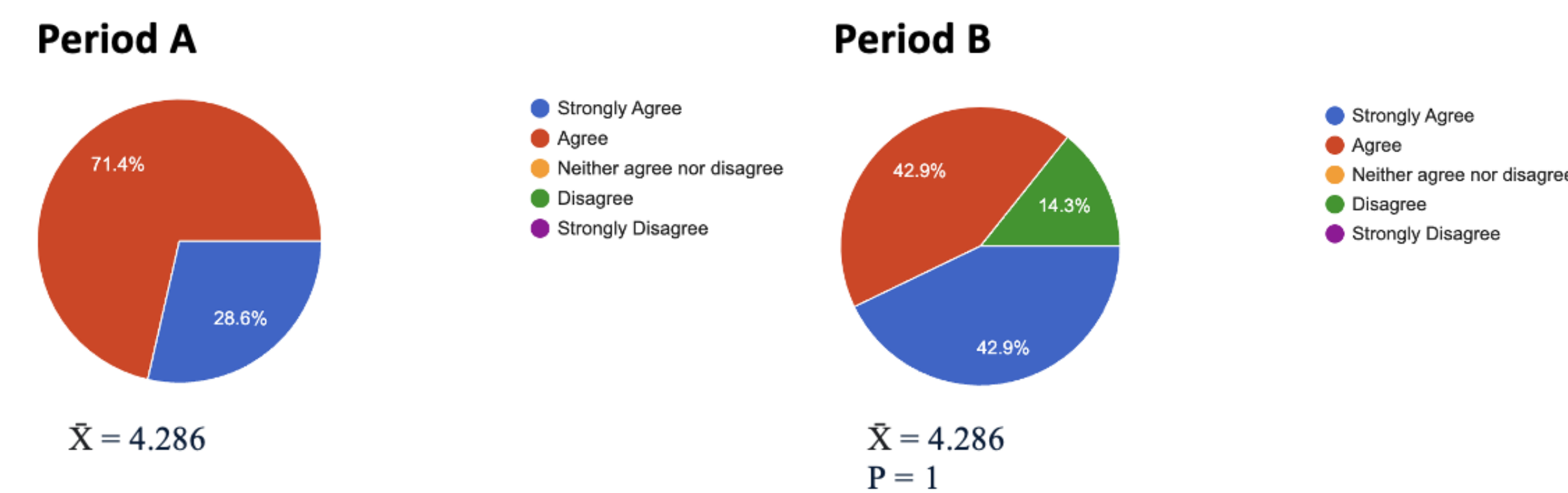
### “Obtaining a history regarding pain is time consuming”



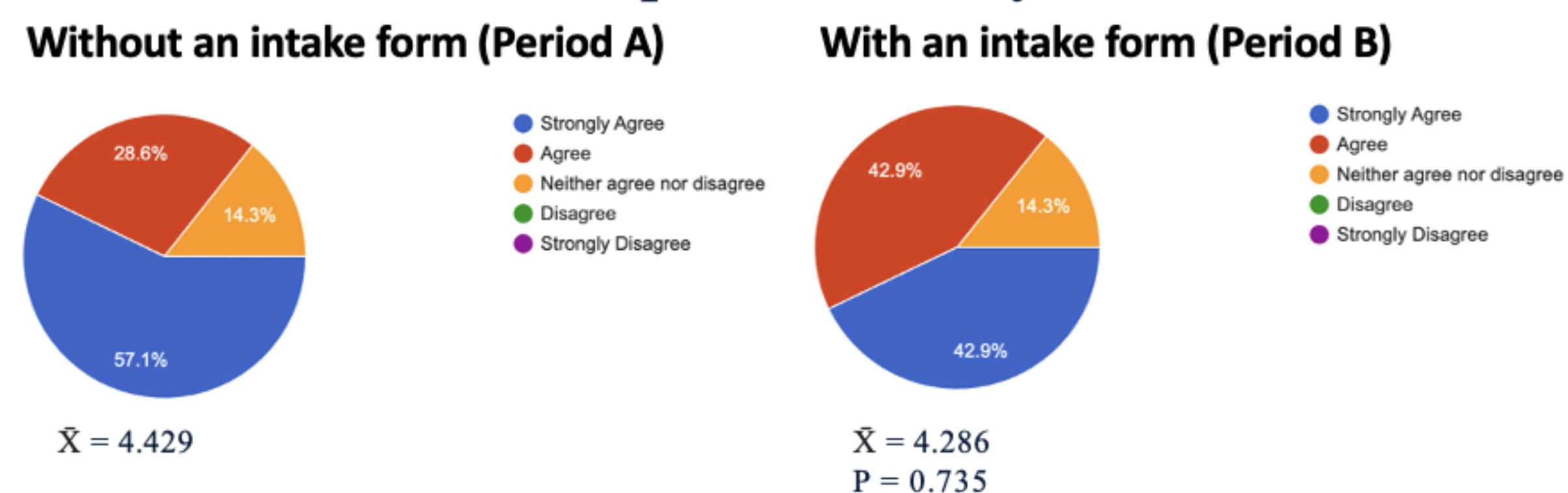
### “Sometimes my history doesn’t include 1 or more of the [Key Components]”



### “HPI Intake forms expedite the history process”

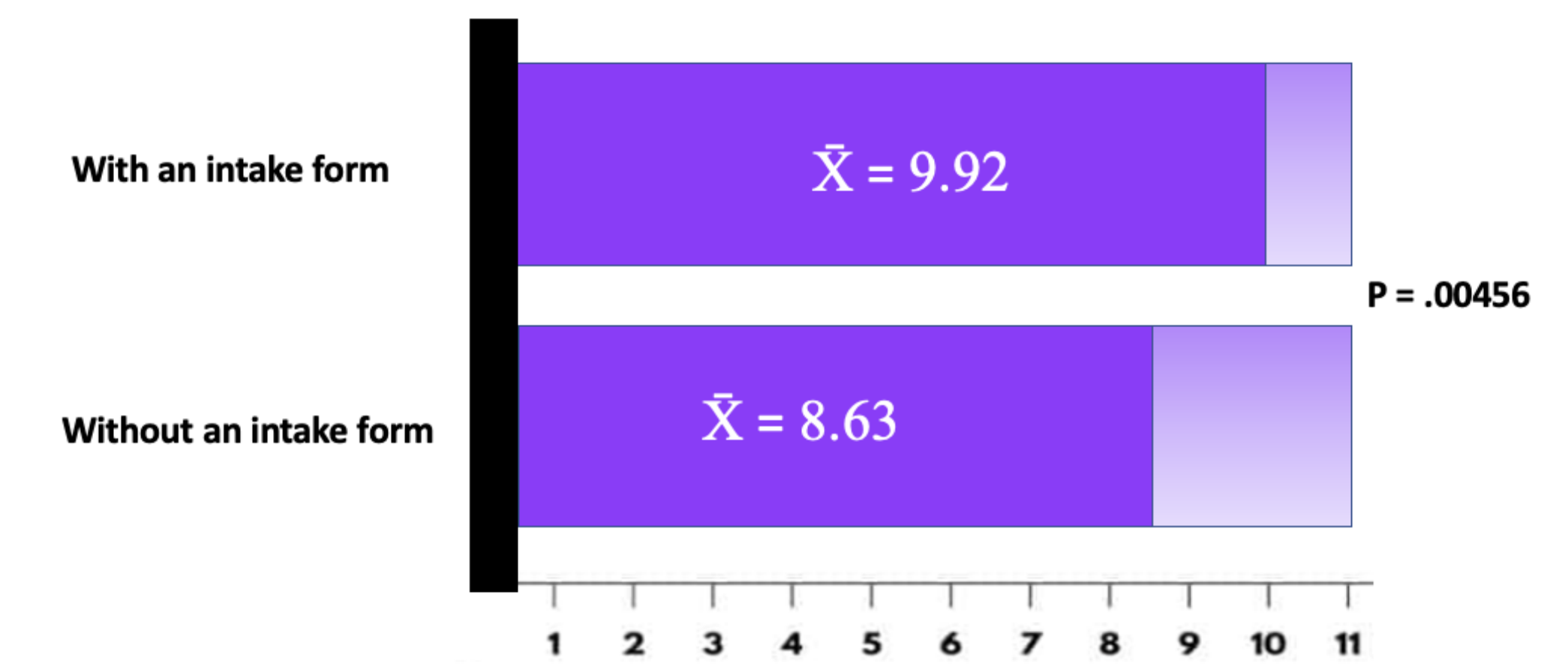


### “HPI Intake forms help me write my notes”



## Results

### Average Number of Included Key HPI Components



## Conclusions

- PM&R Intake overall positive impact on UMC’s PM&R general clinic
- Notes in Period B had significantly more key HPI components
- Residents overall had a positive perception of the intake form and its utility
  - History taking without an intake form was time consuming
  - Intake forms made history taking more efficient
  - Intake forms helped with writing notes

## References

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2. Richmond, C., Jordan , S., Bischof, G., & Sauer, E. (2014). Effects of Solution-Focused Versus Problem-Focused Intake Questions on Pre-treatment Change. Journal of Systemic Therapies. <https://doi.org/10.1521/jsyt.2014.33.1.33>
3. Wilkinson, J., & Elmieh, N. (2019). EXMINING THE EFFECTS OF INTRODUCING AN INFORMATION INTAKE FORM ON DOCTOR-PATIENT COMMUNICATION AND APPOINTMENT EFFICIENCY: A PILOT STUDY.