Contents

Accessing Workflow Histories Component

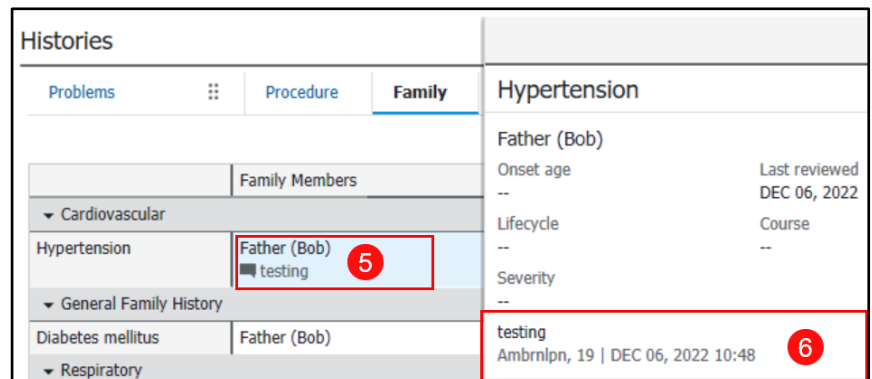1. Click on the Ambulatory Nursing Workflow.
2. Click on the Histories Component.
3. Click on the Family tab.
4. Select the desired view.
   a. Condition view: The Condition is displayed as the row header and the Family Member is displayed as the column.
   b. Family Member view: The Family Member is displayed as the row header and the Condition is displayed as the column.

5. Select a family member or condition row to open the detail pane.

6. The most recently submitted comment is displayed at the bottom of the detail pane. If there are other documented comments, click Show All to display.

Managing Patient Requests

Patient requests to add a family history item display Add in the Requests column.

Complete the following steps to add or decline patient requests to add family history items (the process is the same from either the Condition View or the Family Member View:

- The system displays the existing data in the Verified Local Record Data section and pending patient requests in the Unverified Data From Outside Sources section.
- To accept the suggested family history item, click Add.
- To eliminate the suggested family history item, click Decline.

Note: If the patient adds a family history item from a version of the patient portal older than HealtheLife 1.1, the system does not display the Add or Decline options; instead, the Acknowledge option is displayed.

Changing the Column Display

To change the column display:

1. Click on the Histories hyperlink while the Family tab is selected.
2. From the Family tab right-click on Family Member Information.
3. Select Properties from the drop-down.
4. From the Available Columns list, select desired columns and click Add.
5. To remove a column, select it from the Current Columns list and click Remove.
6. When finished, click OK.
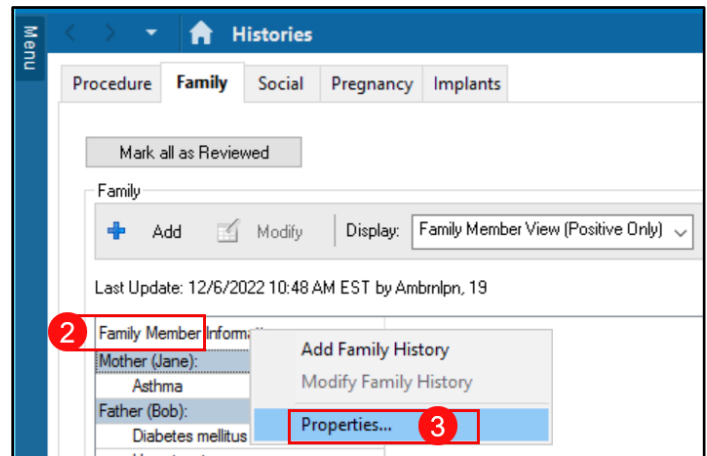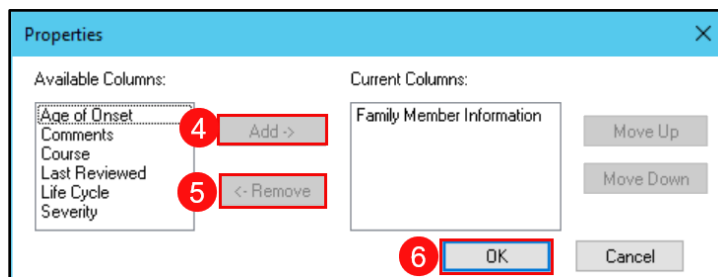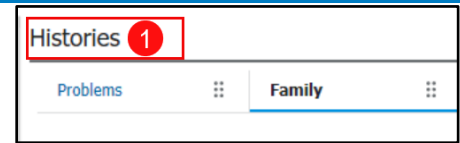
Marking Family History

1. Select one of the following:
   a. Negative: If the patient's family history is negative the Negative box can be checked.
   b. Unable to Obtain: Use Unable to Obtain for cases in which the patient is incapacitated and no one knowledgeable is available to supply any family medical history.
   c. Unknown: Use this option if the patient's biological family history is unknown.
   d. Patient Adopted: Use this option when the patient's family history is unknow due to adoption.
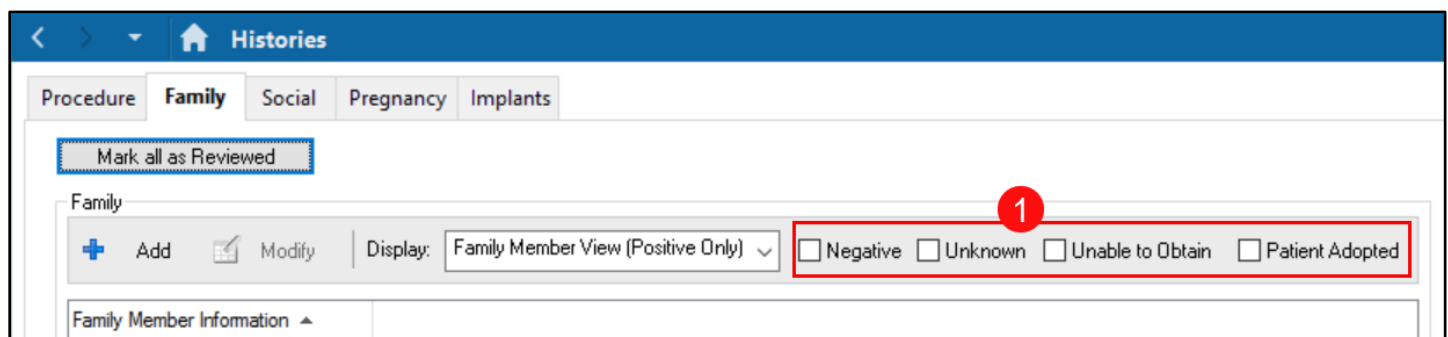
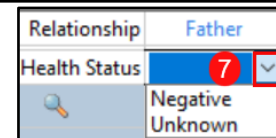# Family History Component Overview for Providers and Clinical Staff

Adding Family Members

To add a family member:

1. Click + Add.

2. Click Add Family Members.

3. Select the relationship to the patient to add.

4. Click on the desired Relationship hyperlink.
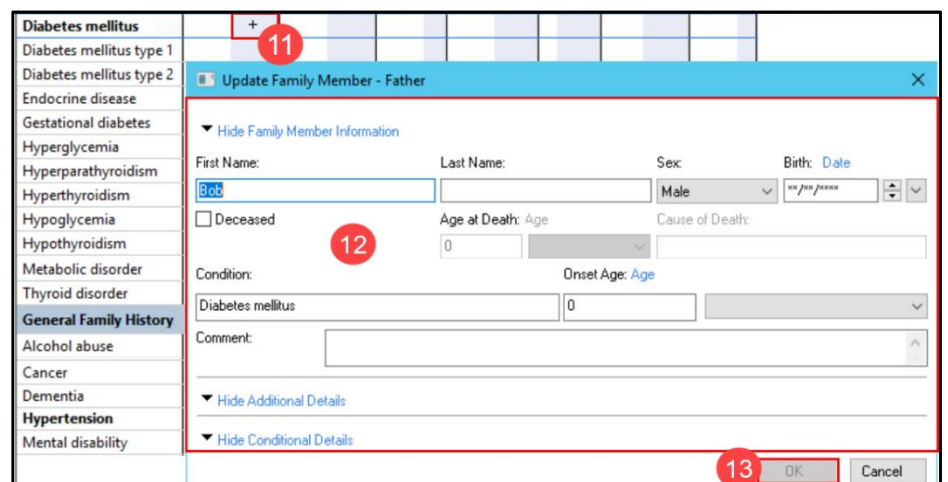
5. Complete appropriate fields.

6. Click OK.
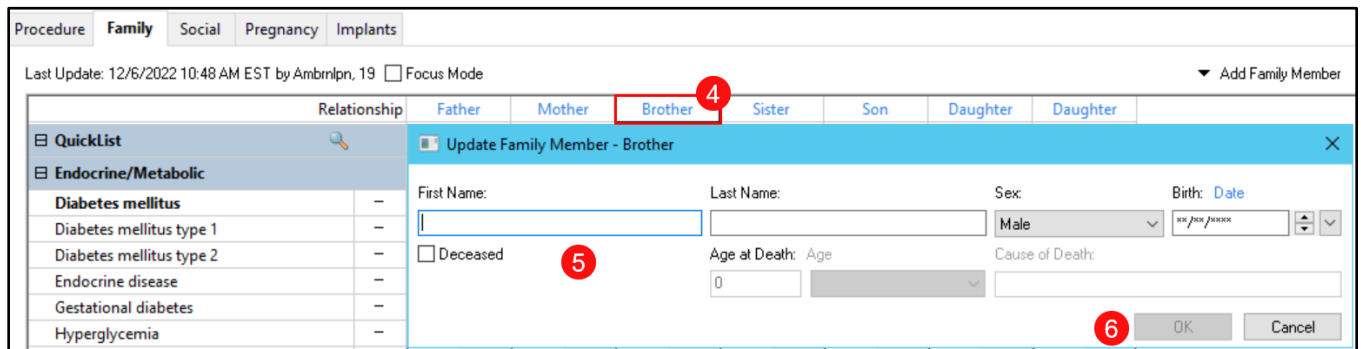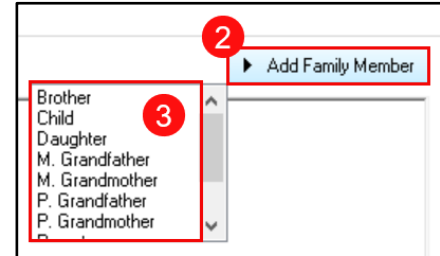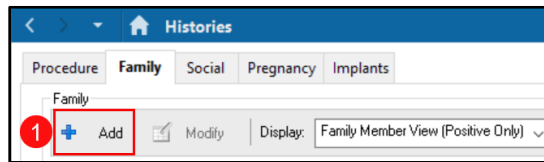
7. Click on the drop-down arrow in the Health Status row to select the family member's history as Negative or Unknown.

8. To mark a condition as Negative for all listed family members, click the negative next to the condition.

9. To mark a condition as Negative for an individual, click the (-) box in the white column under their name.

10. To mark a condition as Positive for an individual, click the (+) box in the blue column under their name.

11. Double-click the plus (+) sign identified in Step a, above. The Update Family Member dialog box opens.

12. Enter information in the fields, as needed.
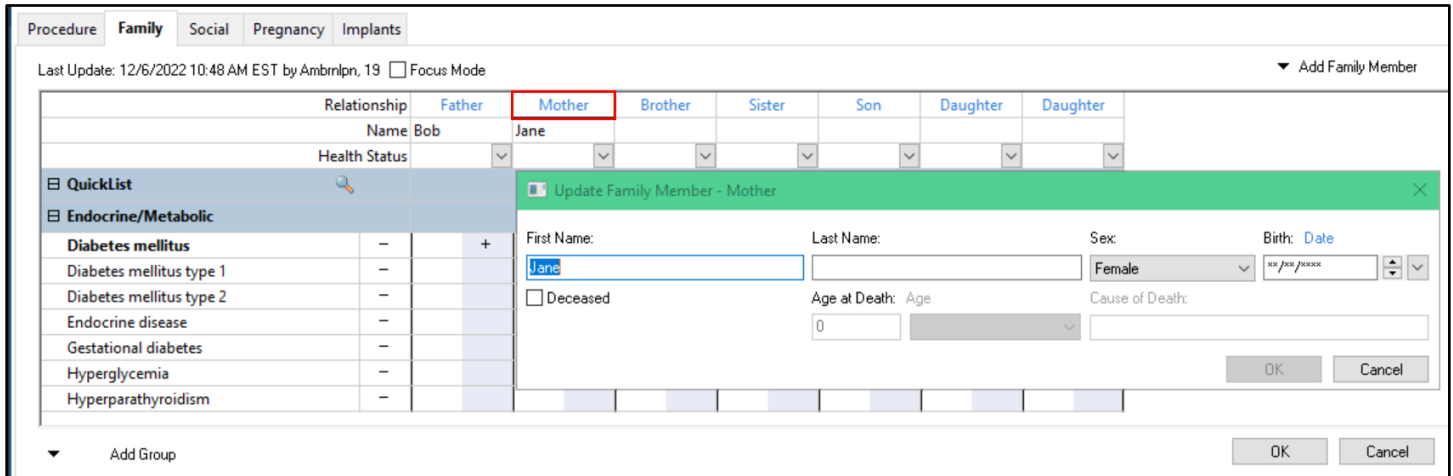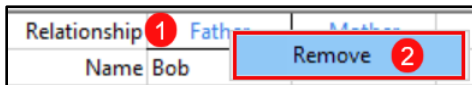
13. When finished, click OK.

Modifying Family Member Details

Click on the Relationship hyperlink to open the Update Family Member window. Make the appropriate corrections and then click OK.

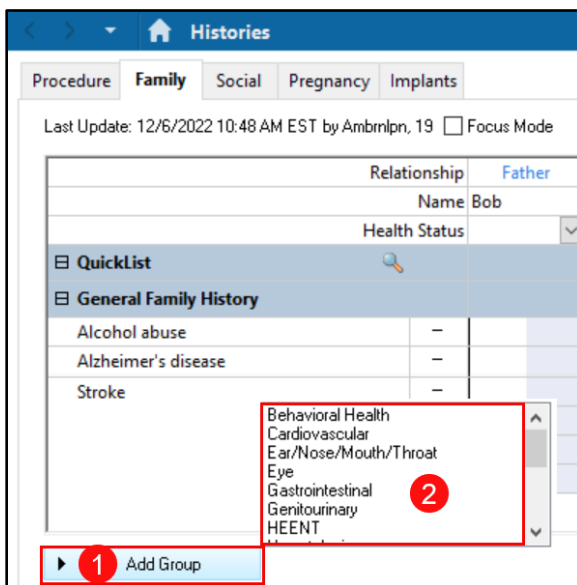## Removing Family Members from Family History

From the Ambulatory Workflow, open the History Component, select the Family tab, click on the Histories hyperlink and click Add.

1. Right-click on Relationship of the person to be removed.
2. Click on Remove.

Adding a Group of Conditions

From the Ambulatory Workflow, open the History Component, select the Family tab, click on the Histories hyperlink and click Add.

1. Click Add Group.
2. Select the desired Group of Conditions to add.
3. To remove right-click on the group name.
4. Click Remove.

Searching for and Selecting Conditions to Add

From the Ambulatory Workflow, open the History Component, select the Family tab, click on the Histories hyperlink and click Add.

1. Click the magnifying glass icon in QuickList.
2. Click the Search tab.
3. Enter the term in the Search field.
4. Double click on the desired condition.
5. Ensure that the desired condition is listed in the Condition Name column. Repeat steps 2-5 to add additional conditions.
6. Click OK.
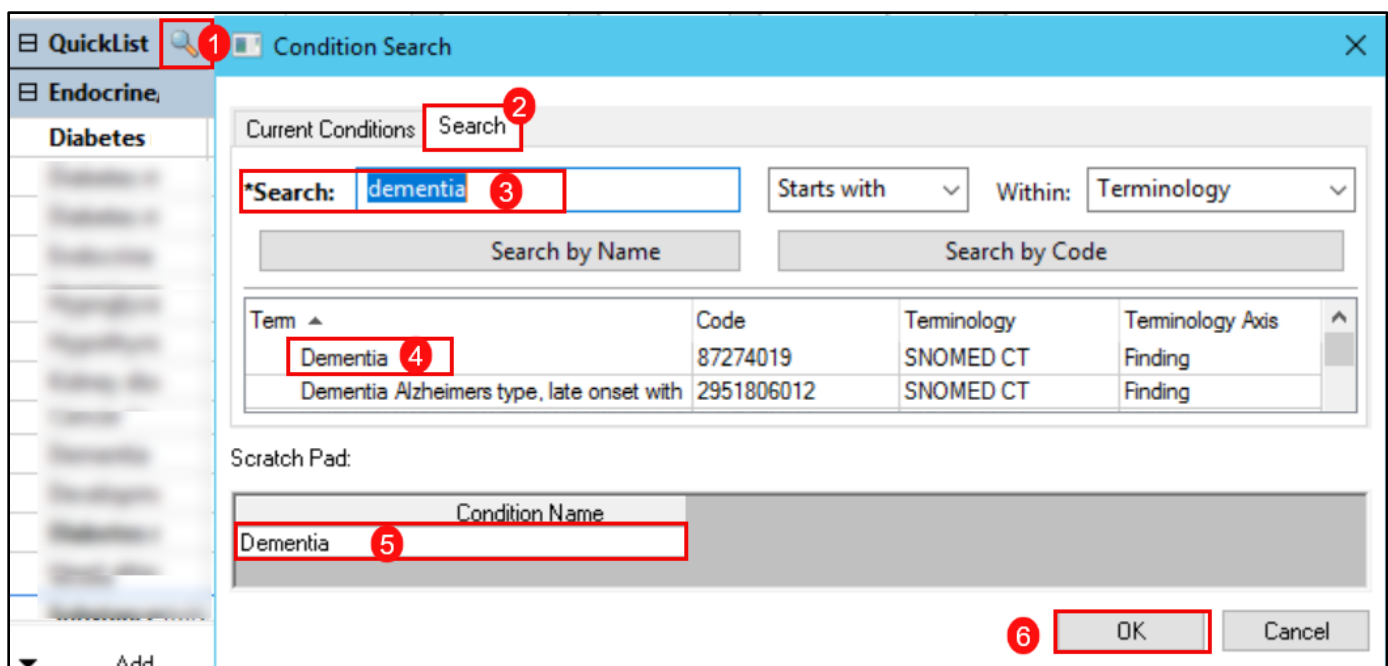
Marking Family History as Reviewed

Clicking Mark all as Reviewed, marks each family history item with the date of the review.