



Case history taking skills and focused systematic inquiry

Case History Skills

What are interpersonal skills in medicine?

These are found within the clinical setting include attributes such as:

- Encouraging the patient to talk freely, and
- Listening attentively whilst making written records

Case History Skills

What are analytical skills in medicine?

For the clinician it implies:

- Listening attentively to what the patient says,
- Understanding what the patient is actually trying to convey across and what it actually means,
- And following up leads with more appropriate questions.

Key points

- Maintain eye contact
- Encourage the patient to speak freely
- Use suitable prompts
- Allow the patient to speak un-interrupted

Preliminary steps

1. Firstly introduce yourself (*who you are and what you do*)
2. Shake hands
3. Explain what you are going to do, and how you are going to do it
4. Ask permission or their agreement if necessary
5. And tell them what may happen at the end of the case history

Describe case history structure

1. Preliminary details
2. Presenting complaint
3. History of presenting complaint
4. Past medical history
5. Systems inquiry
6. Personal and social history
7. Family history
8. Drug history

Preliminary details

- Current date
- Name
- Address & telephone
- Age
- GP name & address
- Occupation
- Weight & height
- Marital status and any children
- Referral

- When describing the nature or history of the presenting complaint what does the acronym **SOCRATES** stand for?



Medical Case History

The nature of the presenting complaint

SOCRATES

S – Site

O – Onset

C – Character

R – Radiation

A – Associated manifestations

T – Time

E – Exacerbating and relieving factors

S – Severity



The nature history of the presenting complaint

(This information will be vital in your differential diagnosis)

- The location of symptoms
- The timing: Onset, duration and frequency of symptoms
- The description or quality of symptoms
- Their perceived intensity or severity
- Any identifiable pattern
- Whether there are any aggravating & relieving factors
- Associated manifestations (such as co-existing signs and symptoms)



Past medical History

- Medical (eg. hepatitis infection)
- Surgical (eg. appendectomy operation)
- Obstetric & Gynaecological (eg. miscarriages and contraception)
- Psychological (eg. history of depression)
- Accidents (eg. trauma and transfusions),

Or alternatively ask about...

- Investigations
- Previous illnesses
- Operations
- Accidents
- Hospitalisations

Why inquire into past medical history?

- To form a complete picture the patient's health status
- To enable you to examine the relationship of the presenting complaint with any previous illnesses
- To exclude the possibility of previous or co-existing conditions, which may affect your subsequent therapeutic programme, and
- Issues of safety

Systems Inquiry Review

- Cardiovascular system
- Respiratory system
- Gastrointestinal system
- Nervous system
- Musculoskeletal system
- Genito-urinary system



Cardiovascular System

- Does the patient suffer from any chest pain?
- Any shortness of breath (dyspnoea)?
- Has the patient noticed any changes or irregularities in their heartbeat (palpitations)?
- Has the patient noticed any ankle swelling or varicose veins?
- Has the patient had any black-outs or faints?
- Does the patient have cold or blue extremities possibly indicating peripheral cyanosis?
- Any previous history of heart attacks, high blood pressure, rheumatic fever?



Respiratory System

- Does the patient suffer from shortness of breath (dyspnoea) at rest?
- Does the patient have a cough of any kind?
- Is the patient a smoker? If so how many and for how long?
- Does the patient cough up any blood (haemoptysis)?
- Has the patient noticed any wheezing?

Respiratory System

- Does the patient suffer from asthma?
- Any recent fevers?
- Any previous history of pneumonia, bronchitis, emphysema or tuberculosis?
- Does the patient have night sweats?
- Has the patient had a recent chest X-ray?

Gastrointestinal System

- Has the patient had any trouble swallowing (dysphagia)?
- Ask the patient if they have noticed any changes in the weight, and any possible reasons for this? (eg. appetite)
- Is the patient troubled by mouth ulcers or a sore tongue?
- Any nausea or vomiting?

Gastrointestinal System

- Does the patient get abdominal pain?
- Has the patient had any bloating or noticeable swelling of their belly? Do they complain of flatulence leading to burping or flatus?
- Have the patients bowel habits changed recently?
- Has the patient ever noticed any yellowing of the skin or eyes indicating jaundice?

Nervous System

- Does the patient get any headaches?
- Has the patient had any fits, faints or blackouts?
- Does the patient ever feel dizzy or experience a sense of rotation as if the room is spinning (vertigo)?
- Any weakness, numbness or pins and needles into the extremities?
- Any clumsiness into the extremities, poor coordination or trouble with walking and balance?

Nervous System

- Has the patient noticed any changes in their special senses (hearing, sight, smell, taste, touch)?
- Has the patient any history of strokes or major head injuries?
- Is there any evidence of memory problems or difficulties?



Genito-urinary System

- Has the patient noticed any changes in passing urine?
 - Any changes in frequency, urgency, volume, colour, smell?
 - Is there a burning pain on passing urine (dysuria)?
 - Any blood in the urine (haematuria)?
 - Is there any delay before they pass urine or dribbling at the end?
 - Does the patient have to get up at night to pass urine (nocturia)?
 - Has the patient noticed any leaking of urine (incontinence)?
- Does the patient have any pain into the back, loin or kidney region?



Genito-urinary System

- Does the patient have any problems with their sex life?
- You may want to find out if the patient is impotent or not?
- With a male patient:
 - Any lumps on your genitals, have they felt any lumps in their testes, penile discharge?
- With a female patient:
 - Have they noticed any changes in their periods?
 - Excessive bleeding or pain, duration, frequency?
 - Any vaginal bleeding between periods, after sex or menopause?
 - Any pregnancies – how many terminations or miscarriages?

Musculoskeletal System

- Is their mobility, work or exercise activities limited due to a problem with their limbs, joints, bones or muscles?
- Does the patient have joint pain? If so then explore its nature
- Has the patient noticed any muscle pain, cramps, weakness?

Musculoskeletal System

- Does the patient have back or neck pain?
- Has the patient had any recent skin rashes, dry eyes or mouth?
- Enquire about any history of injuries and fractures including sports, during work or from road traffic accidents.
- Do they have any joint or limb deformities

PERSONAL AND SOCIAL HISTORY

Ask about:

- Home setting
- Occupation
- Daily patterns
- Sports, recreational and hobby activities

FAMILY HISTORY

- Parents age, state of health or causes of death
- Any hereditary diseases
- Infectious diseases in the family, and
- Any particular conditions that tend to run in ethnic groups

DRUG HISTORY

- Current drugs, dosages, any recent changes and regularity
- Previous long term medications
- Allergies, sensitivities and if they suffered any adverse effects
- Non prescribed medicines
- Nutritional supplements
- Complementary therapies and medicines, and
- Whether they have taken any prohibited substances



End