A Primer for the General Medical and Occupational and Environmental Health History and Physical Form

Template

A. **Purpose**: This template is intended for use by clinicians such as physicians, advance practice providers, or nurses, or nurse practitioners who
   1. Need to provide clinical occupational safety and health services, but do not have a background in this area
   2. Do have a background in occupational medicine or occupational safety and health, but are providing services in contexts that do not support commercially available occupational health history systems.

B. **How to use this form**:
   1. Pages 1-4 are designed to be filled out by the patient prior to meeting with the clinician.
   2. The form could be used in its entirety if both a general history and occupational/environmental history document are required.
   3. Alternatively, pages 2, 3, and 4 could be integrated into a preexisting clinical evaluation form.
   4. The document is provided as a word document so that, if required, additional elements, such as specific chemicals of local importance, can be incorporated into the template.

C. **Notes on the structure of the template**:
   1. The template is structured as a full history and physical examination document to provide clinical end users an idea of where, within the classic history and physical exam structure of demographic, allergy, medication, family history, and physical exam information, the elements related to the occupational and environmental history can fit. Clinicians are reminded of issues surrounding certain aspects of medical information related to the Genetic Information Nondiscrimination Act (GINA), details of which can be found at the following website: [https://www.eeoc.gov/laws/types/genetic.cfm](https://www.eeoc.gov/laws/types/genetic.cfm). If this form is to be used in an occupational medicine clinical setting, careful consideration should be given regarding the inclusion of family history. The collection of family history is a standard part of the general medical evaluation, so it is included for completeness, but the necessity of its use should be evaluated by providers based on the needs of their individual clinical practices.
   2. The Medical History/Review of Systems (ROS) is structured to integrate classic history/ROS and issues about occupational etiologies or concerns, for example asking about detailed dermal related symptoms.

D. **Basis for the template**:
   Information from the occupational health history can assist clinicians and healthcare practitioners in the diagnosis and management of illness and injury related to workplace exposures. Targeted occupational health history tools reported in the literature have focused on specific types of disease or injury, such as asthma (Killorn et al. 2014), or have been designed for use as a self-report questionnaire (Lewis et al. 2002). A general template, available to the broader clinical community for tailoring to specific clinical situations, is presented in the NIOSH General Medical and Occupational Health History Template. This template is based on basic elements of the general occupational and environmental health history found in the *Praeger Handbook of Occupational and Environmental Medicine* (2010), and material incorporated from a search of the literature on occupational exposure-outcome associations. The elements presented in this reference are based on a history tool which provided the means to document workplace physical hazards, a work history, and environmental exposures that may confound or exacerbate health effects due to occupational exposures, developed in coordination with the American Lung Association (Guidotti, 1983). Table 1 presents comments on sections of the template.

References:
<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Demographic, chief complaint, allergies, current medications, family history, hospitalizations or surgeries, habits and sleep</td>
<td>These are the standard sections for these information domains in the clinical examination.</td>
</tr>
<tr>
<td>2</td>
<td>Medical History and Review of Symptoms</td>
<td>This section incorporates elements of both the standard medical history and review of symptoms and elements which would be relevant to occupational illness and injury. The list allows the patient to provide information in a checklist format for rapid review by the clinician. The list was included in the event that a patient did not recall a specific job of significance, but did have a memory triggered, by the listing of occupational groups, of working in one or more occupational groups. These occupations are organized based on the NIOSH National Occupational Research Agenda (NORA) industry sectors, which are also included in this table. This listing is not exhaustive.</td>
</tr>
<tr>
<td>3</td>
<td>Occupational Exposure Inventory and Environmental History</td>
<td>This section asks general questions, answered in a yes/no format, on exposures in the occupational and environmental setting that may be important. The format lends itself to rapid review by the clinician.</td>
</tr>
<tr>
<td>4</td>
<td>Supplemental Questions – can be self-report by patient and reviewed by health care provider, or asked by health care provider</td>
<td>This asks additional general questions, in a yes/no format, on exposures in the occupational and environmental setting. The format lends itself to rapid review by the clinician. There is overlap with questions in the &quot;Occupational Exposure Inventory and Environmental History&quot; section on page 3. Most overlapping questions, however, are asked differently, with the idea that this would ensure some level of response. For example, in the earlier section the patient is asked if they have a hobby, while in this section they are asked specific questions about exposures in work or hobby contexts.</td>
</tr>
<tr>
<td>5</td>
<td>History of Present Illness (HPI), Physical Exam Findings</td>
<td>These sections are the standard HPI and Physical Exam Findings sections of the clinical evaluation.</td>
</tr>
<tr>
<td>6</td>
<td>Laboratory, Radiology and Other Test Results, Assessment and Plan</td>
<td>These sections are the standard test results, assessment and plan sections of the clinical evaluation.</td>
</tr>
</tbody>
</table>