

Patient History - Uncategorized Data

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Understanding Uncategorized History Items

To ensure all selected history items remain visible, practice users should always document a patient's history using the designated **Practice History Template**.

When a user documents history on a template **not used by other practice users**, history items may appear in the **Preview** section as **"Uncategorized."**

- **Why does this happen?** The uncategorized label appears because the items do not exist in the template being used to view the patient's data.
- **How to resolve this?** Switch your user view to the correct **Practice History Template** to ensure all history items are properly categorized.

Look Back Feature to See Dropped Uncategorized Data

If using more than one history template then your history data could be **out of sync**, and some history items may have been inadvertently deleted. You would know this was occurring because you would see Uncategorized data and when you saved the history - those items would just drop out of view. To address this, we have implemented a **look back feature** that allows users to view and manually restore deleted history items.

This feature was necessary to correct a **bug** in our system where:

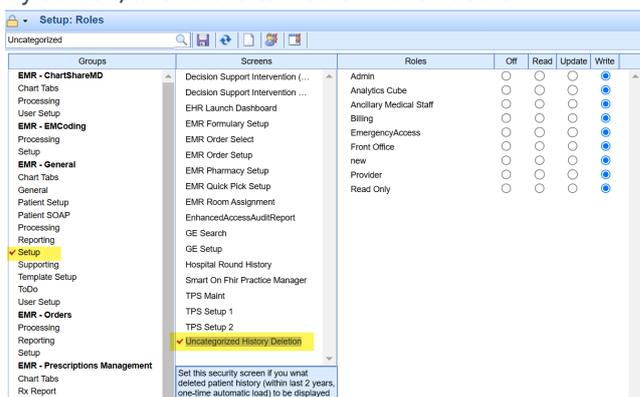
- Previously, if a user **viewed uncategorized history but took no action**, OfficeEMR automatically **removed** those items from this view and placed them in the **patient's history audit log**.
- Now, **uncategorized history remains visible** until a user actively and intentionally updates the history item.

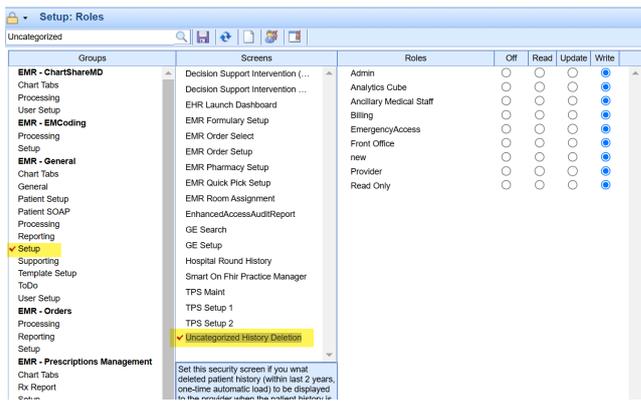
Using the Deleted History Lookback Feature

If your practice has more than one history template in use (uncommon), follow these steps to restore deleted history:

Step 1: Enable Access to the Lookback Feature

- An **admin** must grant your user account the **Role: Uncategorized History Deletion**.
- By default, this role is **turned off** for all users.





Step 2: View Deleted History Items

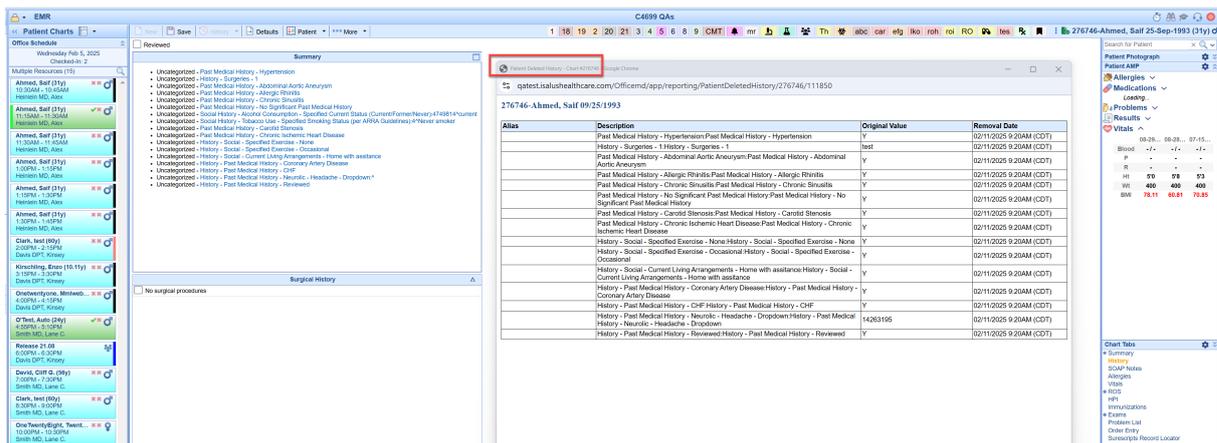
- Once the role is enabled, navigate to the **patient's chart** and access the **History** section.
- A **one-time pop-up window** will appear, displaying any **Deleted History items** found in the patient's **audit log**.

Step 3: Determine Next Steps

- If the **Deleted History window displays "No deleted history,"** there are no missing history items, and you can simply **close** the window.

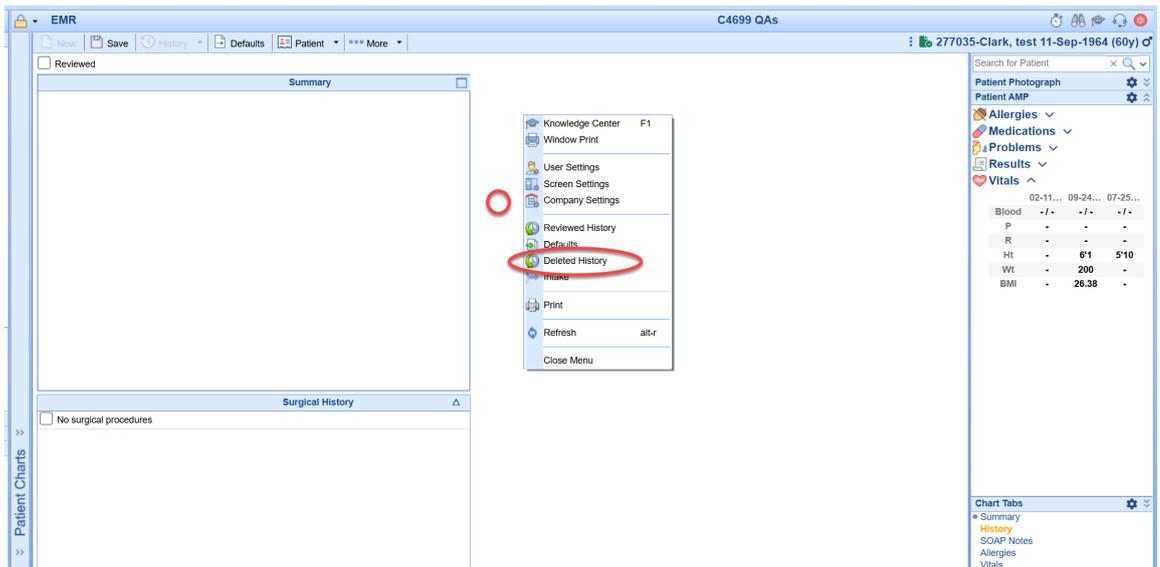


- If **deleted history items are displayed,** compare them with the **patient's current history** and manually **update** their record as needed.



Step 4: Accessing Deleted History Later

- If you **closed the Deleted History window** but need to access it again, simply:
 - Click on the **white space to the right of the History template data**.
 - Select **Deleted History** to reopen the Deleted History screen.



This process ensures accurate documentation of patient history while preventing unintended data loss.
