

# New QuickView Medical Record Reports Tailored to the **Needs of Underwriters**

## CASE OVERVIEW

**Summary Date:** 06.08.2021  
**Case Name:** John Doe  
**Total Pages:** 50 (06.14.2017-06.08.2021)  
**Handwritten/Other Pages:** 3  
**Gender:** Male

The patient is a 68-year-old male with a weight of 187 lbs and a history of depression and sleep apnea. The patient underwent colonoscopies and biopsies over the years, which revealed a sessile serrated polyp, ulcerative colitis, and diverticulosis in the colon, for which Humira Pen was prescribed. Additionally, he suffers from hypertension, hyperlipidemia, and stable coronary heart disease. He underwent cardiac catheterization and stent placement in 2016 and was treated with a variety of medications. Recently, he experienced neuropathy and musculoskeletal pain in the elbow and foot regions. This is managed by Gabapentin and CBD oil.

Tobacco Usage 06.22.2020	Alcohol Usage 02.25.2021	Marijuana Usage 02.25.2021	Substance Abuse Not Found	BMI 31 Avg TY before 06/21
Weight 194lbs Avg TY before 06/21	Height 5'9" Avg TY before 06/21	Blood Pressure 140/75mmHg Avg TY before 06/21	Cholesterol/HDL ratio 2.40 05.30.2020	HDL Cholesterol 55.00mg/dL 05.30.2020
HgA1c Not Found	Total Cholesterol 132.00mg/dL 05.30.2020			

Dynamic color-coded severity visuals for the top eight impairments/categories

Dashboard links provide quick access to key indicators

## CHRONOLOGICAL OVERVIEW

Timeline of information

**Chronological Overview (Life)**  
 Date presented is the first occurrence of a condition or event

- Obesity 2020
- Sleep Apnea Syndrome 2020
- Depression 2020
- Diverticulosis 2019
- Diverticulosis Of Sigmoid Colon 2019
- Hyperlipidemia pre 2019
- Alcohol current user 2017
- Gastrointestinal hemorrhage 2017
- Coronary heart disease 2017
- Herniorrhaphy pre 2017
- Hypertension pre 2017
- Hospitalization 2017
- Angioplasty 2017
- Angina pectoris 2017
- Cardiovascular Disease 2016
- Coronary Stent Placement 2016
- Cardiac catheterization 2016
- Preventive Patient Evaluation 2011
- Ulcerative colitis 2010
- Angioma pre 2010
- Former smoker 1970

Color coded severity guidance to flag areas of underwriting significance

## HABITS SECTION (AND TIMELINE)

Timeline of activities

**Tobacco Usage**  
 Last Mention: 06.22.2020  
 • Former tobacco user (2020)  
 • "2 Packs Per Day (former)" 2020  
 • "Packs/day: 0.25 (former)" (1970)  
 • Negative for Current tobacco user (2019)

**Alcohol Usage**  
 Last Mention: 02.25.2021  
 • Alcohol current user (2021)  
 • Occasional alcohol drinker (2019)

**Marijuana Usage**  
 Last Mention: 02.25.2021

**Substance Abuse**  
 Last Mention: 11.19.2019  
 • Negative For Substance use (2019)

## RECENT HISTORY AND FINDINGS

**Recent Encounters**  
 In the 24 months prior to 10.05.2022

Date	Type	Abstract
12.30.2021	Progress Notes Herman, Martin	The patient is a male right-handed unaccompanied who presents for memory impairment. Over the past several years he has noted a memory problem but it is primarily limited to remembering people's names. He does not feel that this is progressive and he does not associate it with any type of acute event. He does not experience any difficulties in doing his work. The patient is not repetitious. He may occasionally misplace something but it has not been a major problem. He leaves home without his cell phone but never forgets his wallet. He is driving and denies getting lost, accidents or citations. He was diagnosed with obstructive sleep apnea in the past but decided against treatment. He states he may get up to 9 hours of sleep per night. He continues to snore loudly and there are times when he awakes gasping. <a href="#">Go To Transcription</a>   <a href="#">Go To Source Documentation</a>
07.08.2021	Physician Encounter Deora, Sonio	07.08.2021 - Physician Encounter The patient is here for a f/u of results. He has hyperlipidemia, hyperglycemia, vitamin D deficiency, and gastro-esophageal reflux disease without esophagitis. He is getting endoscopy and taking O meprazole 40 mg and Vit D weekly. He will follow up in 6 months. <a href="#">Go To Transcription</a>   <a href="#">Go To Source Documentation</a>

Ties together date, healthcare provider and reason for encounter

## BLOOD AND URINE PROFILES

**Blood Profile**

Title	Date	Value	Cited Status
White blood cell count	03.22.2021	5.60 10 <sup>3</sup> /uL	
Red blood cell count	06.14.2017	4.81	
Hemoglobin measurement	03.22.2021	13.00 mg/dL	
Hematocrit measurement	03.22.2021	39.00 %	
MCV measurement	03.22.2021	84.00 fL	

Red indicates findings outside of normal range

**Chemistry panel**

Title	Date	Value	Cited Status
Glucose measurement	03.22.2021	98.00 mg/dL	
Glucose blood test		▲	
HbA1c measurement		19.00 mg/dL	
		0.70 mg/dL	

**Urine Profile**

Title	Date	Value	Cited Status
Urinalysis	05.30.2020	negative	
Urine glucose measurement			
Urine protein measurement			
Urine albumin measurement			

Organizes and presents lab tests and results with insurance risk assessment in mind