Medical history

Appointment report · Morgan Example

Fictional demonstration. Patient, clinicians, records and source references below are invented to show the deliverable format.

01

Patient & appointment

PatientMorgan Example	Date of birth12 April 1980
Report referenceDEMO-MED-0042	Prepared23 October 2026
Appointment28 October 2026 · Establish primary care	Receiving clinicianDr. Rowan Ellis · Cedar Primary Care
Record period18 May 2022–20 October 2026	File examinedNine fictional documents · 20 pages

Appointment overview

Area	Recorded history	Source
Medication history	Amlodipine and cetirizine appear on the latest supplied medication list. Sertraline is marked discontinued.	F01 p. 2
Conditions	Hypertension; allergic rhinitis; prior depression diagnosis.	F01 pp. 1–2; F02 p. 1
Surgery	Laparoscopic cholecystectomy, 18 May 2022.	F03 pp. 1–2
Family history	Patient-reported diabetes in mother and hypertension in father.	F04 p. 4
Open record questions	Sertraline stop date differs between two records; prior dose-change visit note is absent.	F01 p. 2; F05 p. 1; F06 p. 1

02

Prescription & medication history

Entries below reproduce the fictional supplied records. “Active” describes the source list on its recorded date.

byBrightly accurately represents the supplied material; we do not certify that the information within it is true or correct.

Amlodipine

PatientMorgan Example · DOB 12 April 1980	PrescriptionAmlodipine · 5 mg tablet
Recorded dose5 mg · one tablet	Route / frequencyOral · once daily
PrescriberDr. Leah Morgan · Orchard Family Practice	Start date14 March 2024
End dateNot recorded	Recorded statusListed active on 30 June 2026
Recorded indicationHypertension	SourceF01 p. 2; F02 p. 2

The same 5 mg daily entry appears in the March 2024 and June 2026 lists. These lists do not establish dispensing or adherence.

Cetirizine

PatientMorgan Example · DOB 12 April 1980	PrescriptionCetirizine · 10 mg tablet
Recorded dose10 mg · one tablet	Route / frequencyOral · once daily as needed
Recorded byDr. Leah Morgan · Orchard Family Practice	PrescriberNot identified; listed as over-the-counter
Start dateNot recorded	End dateNot recorded
Recorded statusListed active on 30 June 2026	SourceF01 p. 2

The supplied list records as-needed use for seasonal allergy symptoms. No original start date is supplied.

Sertraline

PatientMorgan Example · DOB 12 April 1980	PrescriptionSertraline · 50 mg tablet at last recorded dose
Recorded dose50 mg · one tablet	Route / frequencyOral · once daily
PrescriberDr. Evan Shaw · Meadow Behavioral Health	Start date10 April 2023 · initial 25 mg dose
Dose change50 mg recorded from 12 July 2023	End dateConflicting entries: 15 December 2025 / January 2026
Recorded statusDiscontinued in supplied records	SourceF05 pp. 1–2; F06 p. 1; F01 p. 2

F05 gives a stop date of 15 December 2025. F01 records “stopped January 2026.” The supplied records do not resolve the difference.

Prescription chronology

Date	Recorded change	Prescriber / source
10 April 2023	Sertraline 25 mg oral once daily started.	Dr. Evan Shaw · F05 p. 2
12 July 2023	Sertraline 50 mg daily appears; dose-change visit note is not supplied.	Dr. Evan Shaw · F06 p. 1
14 March 2024	Amlodipine 5 mg oral once daily started.	Dr. Leah Morgan · F02 p. 2
15 December 2025	Sertraline marked stopped in behavioral-health summary.	Dr. Evan Shaw · F05 p. 1
30 June 2026	Primary-care list records sertraline stopped January 2026; amlodipine and cetirizine listed active.	Dr. Leah Morgan · F01 p. 2

02B

OTC medicines & supplements

Fictional demonstration continued. Clinical-list status, patient-reported use and purchase evidence are shown separately.

Vitamin D3 · Example Essentials

PatientMorgan Example · DOB 12 April 1980	Product / ingredientExample Essentials Vitamin D3 · cholecalciferol
Label strength25 mcg (1,000 IU) per softgel · F08 p. 1	Reported amount / routeOne softgel orally
Reported frequencyOnce daily with breakfast · patient account dated 20 October 2026	Reported reasonGeneral supplementation · patient account
Prescriber / recommenderPatient reports self-selected; no prescriber identified	Start / endApproximately September 2026 / no stop reported
Purchase evidence3 September 2026 · one bottle, 120 softgels · F07 p. 1	Evidence statusPatient-reported current use; label and purchase documented; absent from supplied clinical lists
SourcesF07 p. 1; F08 p. 1; F09 p. 1	

Magnesium glycinate · Example Essentials

PatientMorgan Example · DOB 12 April 1980	Product / ingredientExample Essentials Magnesium Glycinate
Strength / formulationNot established: order title omits elemental magnesium per serving; label not supplied	Amount / route / frequencyNot established
Reason / recommenderNot supplied	Start / endNot established
Purchase evidence3 September 2026 · one bottle, 90 capsules · F07 p. 1	Evidence statusPurchase only; F09 leaves the use question unanswered
Next information neededProduct-label image; whether bought for Morgan; whether used, amount, frequency and dates	SourcesF07 p. 1; F09 p. 1

Cross-check with the clinical list

Cetirizine is identified as OTC in F01 p. 2. In F09 p. 1, Morgan reports one 10 mg tablet orally on allergy-symptom days, most recently 18 October 2026; original start date remains unknown. Vitamin D3 and magnesium do not appear on the supplied June clinical list. The October patient account and September purchase record are later sources.

03

Conditions & care

Condition	First supplied entry	Clinician / record	Latest supplied account
Hypertension	14 March 2024	Dr. Leah Morgan · F02 p. 1	Listed on 30 June 2026 problem list · F01 p. 1
Allergic rhinitis	14 March 2024	Dr. Leah Morgan · F02 p. 1	Seasonal symptoms documented; cetirizine as needed · F01 pp. 1–2
Depression	10 April 2023	Dr. Evan Shaw · F05 p. 2	Treatment history summarized through December 2025; primary-care list retains diagnosis · F05 p. 1; F01 p. 1

“First supplied entry” is the earliest appearance in this sample file, not an established onset date.

04

Surgical history

PatientMorgan Example	ProcedureLaparoscopic cholecystectomy
Date18 May 2022	FacilityValley District Hospital
SurgeonDr. Priya Hale	Recorded indicationSymptomatic gallstones
Recorded outcomeOperation note reports no intraoperative complication; discharged 19 May 2022.	SourceF03 operation note pp. 1–2; discharge p. 3

F03 contains the operation and discharge account. No later surgical follow-up note is included in the supplied sample.

05

Family history

Relative	Recorded history	How recorded	Source
Mother	Type 2 diabetes; age at diagnosis not recorded.	Patient-reported at intake.	F04 p. 4
Father	Hypertension; age at diagnosis not recorded.	Patient-reported at intake.	F04 p. 4
Siblings / children	No entries in the supplied family-history field.	Not established from the supplied record.	F04 p. 4

A blank field does not establish a negative family history. These entries are patient-reported, not independently documented diagnoses of relatives.

Source index & record gaps

ID	Fictional document	Author / provider	Date / pages
F01	Primary-care review, problem and medication lists	Dr. Leah Morgan · Orchard Family Practice	30 June 2026 · 3 pages
F02	Initial hypertension review and medication list	Dr. Leah Morgan · Orchard Family Practice	14 March 2024 · 2 pages
F03	Operation note and discharge summary	Dr. Priya Hale · Valley District Hospital	18–19 May 2022 · 3 pages
F04	New-patient intake, including family history	Dr. Rowan Ellis · Cedar Primary Care	6 June 2025 · 4 pages
F05	Treatment summary and initial prescription entry	Dr. Evan Shaw · Meadow Behavioral Health	15 December 2025; includes 10 April 2023 entry · 3 pages
F06	Prescription review and medication list	Dr. Evan Shaw · Meadow Behavioral Health	12 July 2023 · 2 pages
F07	Online order receipt: vitamin D3 and magnesium products	Example Market · fictional retailer	3 September 2026 · 1 page
F08	Vitamin D3 product-label photograph	Patient-supplied image · fictional product	20 October 2026 · 1 page
F09	Dated medication and supplement account	Morgan Example · patient-reported	20 October 2026 · 1 page

Questions carried forward

Issue	What the supplied file establishes	What remains open
Sertraline stop date	F05: 15 December 2025. F01: January 2026.	Exact stop date is unresolved.
Sertraline dose-change account	F06 lists 50 mg from 12 July 2023.	The visit note explaining the change is absent.
Current medication reconciliation	F01 is the latest supplied list, dated 30 June 2026.	F09 adds an October patient account; later clinical confirmation is not supplied.
Magnesium purchase	F07 documents the product order.	Identity of user, formulation, amount, frequency and use dates remain open.
Surgical follow-up	F03 supplies operation and discharge notes.	Later follow-up is not supplied.