

Information in the Clinical Summary

The clinical summary provides an opportunity for the clinician to verbally review the information with the patient, reinforce the importance of the summary itself, and explain key pieces of information, such as special medication instructions or necessary follow-up care. Don't underestimate the importance of reviewing the summary with patients, as they are more likely to see the value of the summary if it is acknowledged and addressed during the office visit.

Core information in the clinical summary includes:

Patient name	Problem list/current conditions*
Provider name	
Date and location of visit	Medication list*
Reason(s) for visit	Medication allergies*
Vitals (temperature, blood pressure, height, weight, BMI, exercise status in minutes/week)	Diagnostic test/lab results*
	Patient instructions
	Recommended patient decision aids**
Smoking status**	Care plan field**
Demographic information**	

* = required for Stage 1 of meaningful use.

** = required for Stage 2 of meaningful use.

Additional information in the summary may include:

Referrals	Appointments/testing already scheduled
Problem history	
Topics covered during the visit	Medication instructions
Immunizations or medications administered during visit	Personalized instructions/notes
	Links to (or copies of) relevant educational information
When next appointment is recommended	Care gaps
Other appointments/testing that patient needs to schedule	Preventive screenings due
	Personalized message/closing

Healthcare providers may withhold certain information if it is believed that such information would cause substantial harm to the patient or another individual.

Tips for a Successful Clinical Summary

- Use formatting, such as bold type, to highlight important health information.
- Highlight categories or major sections of information, such as health reminders, referrals, procedures, and medications.
- Display actionable information as well as the clinic phone number prominently and clearly.
- Use plain language and define or explain terms that may be difficult for some patients to understand.
- Keep the length to one or two pages.
- Consider the needs of the patient population when deciding what information to include. If possible, involve patients in the development and design to help ensure the desired impact.
- Tailor the content to meet patient needs and preferences. Also, ask for patient feedback during rollout to help ensure that the information/messages are easily understood.

Clinical Summary Example

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After Visit Summary

This document contains confidential information about your health and care. It is provided directly to you for your personal, private use only.

Visit Information				
Appointment Information	Date	Time	Department	Provider
	08/22/2007	1:28 PM	NGT FAMILY PRACTICE	PAULA SMITH, MD
If you have questions or need further information, call this department at 206-527-7100 or send a secure message to your provider.				
Vitals	Blood Pressure	Pulse	Temperature	Height
	160/90	80	98 °F (36.7 °C)	5' 5" (1.65 m)
	Weight	Body Mass Index		
	160 lbs (72.58 kg)	26.63		
Reason for Visit	Diabetes			
	Blood Pressure			
Diagnoses	DM W/O COMPLI FINGER SPRAIN NEED FOR VACC BIRTH CONTROL			
Patient Instructions	Diabetes Cond Learn the basic your blood gluc information abt diabetes. Check out the https://member Home treatmen https://member			
Health Reminders				
This section shows your upcoming office visits and recommended preventative care measures. If you contact your primary care provider.				
Appointments	Date & Time	Provider	Department	
	10/2/2007 9:00 AM	Barbara Detering, Physician	Bm Family Practice	
	11/2/2007 11:00 AM	Barbara Detering, Physician	Bm Family Practice	
For Health Improvement	Name	Due Date		
	ANNUAL LIPID PROFILE FOR DIABETICS	10/20/1987		
	HIGH RISK: 1 YEAR COLONOSCOPY	10/20/1970		
	PAP TEST	07/18/2010		
Upcoming Lab Tests				
This section lists all lab tests you need to do after today. This may include tests ordered at previous Health medical center for these lab tests. For orders with an "available" date, go on that date or as soon as possible.				
Recurring Orders	Order	Provider	Ordered	Inte
	HEMOGLOBIN A1C [83036.001]	DIMER, JANE ANN S	7/11/2007	Even
	LIPOPROTEIN PANEL (GHC) [80061.002]	AFFOLTER, WILLIAM T	8/15/2007	Even
Instructions				
Guidelines to Follow This laboratory test requires fasting prior to specimen collection. For fasting blood you must not eat or drink anything, except water, after 10:00 P.M. the night before the lab. This includes gum, candy, tea, and coffee.				