

## Providing Patients in Ambulatory Care Settings with a Clinical Summary of the Office Visit

A core meaningful use requirement for patient and family engagement is to provide patients with a clinical summary of the office visit. This summary supports continuity of patient care by providing patients and their families with relevant and actionable information. Also, it can reduce calls and extra work for you.

It is designed to be given to patients at the end of an office medical visit as a summary of what happened during the visit and to provide information and instructions to guide their next healthcare steps. An office visit is any billable visit, including concurrent care or transfer of care visits, consultant visits, or prolonged physician service without direct (face-to-face) patient contact, such as telehealth.

You may deliver the summary through an electronic health record (EHR) patient portal, secure e-mail, electronic media (such as a CD or USB flash drive), or as a printed copy. If the patient requests it, the healthcare provider must provide a printed copy. Although the clinical summary should be available

electronically, there is real value in providing the patient with a printed copy as a way to communicate important information at the end of the office visit.



### Importance of the Printed Copy

*During recent conversations with a large integrated health system about “going green” and reducing the use of paper in their facilities, the consensus was that the clinical summary is the one paper document they will definitely continue using, as it is an invaluable communication tool.*

### 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
- Provider name
- Date and location of visit
- Reason(s) for visit
- Vitals (temperature, blood pressure, height, weight, BMI, exercise status in minutes/week)
- Problem list/current conditions\*
- Medication list\*
- Medication allergies\*
- Diagnostic test/lab results\*
- Patient instructions

*\*Required for Stage 1 of Meaningful Use*

Additional information in the summary may include:

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

## 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.

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

### Clinical Summary Example

**Jill Ellis (03000144)**

#### 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				
<b>Appointment Information</b>	<b>Date</b>	<b>Time</b>	<b>Department</b>	<b>Provider</b>
	08/22/2007	1:28 PM	NOT 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				
<b>Blood Pressure</b>	<b>Pulse</b>	<b>Temperature</b>	<b>Height</b>	<b>Weight</b>
160/90	80	98 °F (36.7 °C)	5' 5" (1.65 m)	160 lbs (72.56 kg)

**Body Mass Index**  
26.63

Health Reminders				
This section shows your upcoming office visits and recommended preventative care measures. If you contact your primary care provider.				
<b>Reason for Visit:</b>	Diabetes Blood Pressure	<b>Appointments</b>	<b>Date &amp; Time</b>	<b>Provider</b>
			10/2/2007 9:00 AM	Barbara Detering, Physician
			11/22/07 11:00 AM	Barbara Detering, Physician
				Sm Family Practice
				sm Family Practice
<b>Diagnoses</b>	DM W/O COMPL FINGER SPRAIN NEED FOR VACC BIRTH CONTROL	<b>For Health Improvement</b>	<b>Name</b>	<b>Due Date</b>
			ANNUAL LIPID PROFILE FOR DIABETICS	10/20/08
			HIGH RISK 1 YEAR COLONOSCOPY	10/20/08
			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 a date.				
<b>Recurring Orders</b>	<b>Order</b>	<b>Provider</b>	<b>Ordered</b>	<b>Job</b>
	HEMOGLOBIN A1C (83036.001)	DIMER, JANE ANN S	7/11/2007	Ev
	LIPOPROTEIN PANEL (GHC) (80061.002)	AFFOLTER, WILLIAM T	8/15/2007	Ev
	Instructions			
<b>Guidelines to Follow</b> This laboratory test requires fasting prior to specimen collection. For fasting 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.				

Patient Instructions	
Diabetes Conc	Learn the basic your blood glu information ab diabetes.
	Check out the <a href="https://member">https://member</a>
	Home treatme <a href="https://member">https://member</a>