# STATE OF THE NOTE SUMMIT 2021 MEDICAL SPECIALTY DO'S AND DONT'S

# **STOP WRITING THIS**

	PATIENT: MRN: CSN: DOB: 2/29/2021				
	Visit Date: 03/29/21				
	Chief Complaint: Chief Complaint Parlient presents with Follow Up LT KINEE INJECTION F/U				
HPE Jack & Quick is a 60 yac, year old malk who intums for evaluation and treatment of left keep pain. The placetest propriors begin 2 years aga. The pain is raided as (2 ha good improvement for a cough of month their started weating off. Patient has no other concerns. Patient requesting another injection.					
	Since the last office visit the patient states that the symptoms have begun to increase. Patient tells me that he is getting 2 to 4 months of relief from his injections.				
	Subjective Subjective:				
	Past Medical History: Disgnosis Arthritis shoulder, hip	Date			
GERD (gastroesophageal reflux disease)					
	HTN (hypertension)				
	Hyperlipidemia				
	Past Surgical History: Procedure PR COLONOSCOPY FLX DX W/COLLJ	Laterality N/A	Date 4/17/2015		
	SPEC WHEN PERMD				
	COLONOSCOPY performed by Loer Gutz, DO at CTHG ENDO				
	Social History				
	Socioeconomic History Marital status:	Single			
	Spouse name:	Not on file			
	Number of children: Years of education:	Not on file Not on file			
	Years of education: Highest education level:	Not on file Not on file			
	Occupational History Employer:	SELF-EMPLOYED			
	Tobacco Lise				
	Smoking status: Quit date:	Former Smoker A/8/1995			
	Quit date: Years since guitting	4/8/1995			
	Smokeless tobacco:	Never Used			
	Vaping Use				
	Vaping Use:	Never used			

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# THINGS TO FOCUS ON

#### History of Present Illness

A section of pertinent clinical details, relevant to the diagnoses being addressed in the visit is **essential**, **useful**, **and valuable** for many of the notes' recipients.

#### Assessment and Plan

Include **any details that affect the plan for the patient's conditions**, their challenges (both medical and social) and your medical decision making process. The age of narrative notes is now!

# **THINGS TO RECONSIDER**

#### Chief Complaint

History of present illness will often repeat the chief complaint, or just state it in a clearer way. **Don't repeat it**, and if you keep it, don't use shorthand.

### Relevant Physical Exam Data

There is no requirement to include the entire Physical Exam, including vitals. However, **pulling in the relevant items to the diagnoses** and current state of the patient is important to the clinical utility of the note.

#### **Patient Instructions**

Generally, your assessment and plan, and instructions have significant overlap, with one written for the patient and the other for yourself. **Consider combining** them and simply writing a more easily interpreted plan.

#### Abbreviations

Patients will see your notes, **be thoughtful about when abbreviations will be easily understood**, and when the full phrase is more understandable. Software should help with this!

#### Time Spent

Your time in the chart should be **tracked in the EHR**, and you are not required to list your complete time in your note. However, this is an issue that varies by organization and payer.

# THINGS TO DROP FROM YOUR NOTE

## Complete Reviews, Prior Histories, Clinical Lists, & Procedure Notes

You are no longer required to document the work you did for review as part of medical decision making in the note. **Keep the items that are relevant** to your History of Present Illness, or Assessment and Plan, but let the rest be shown elsewhere.

# WRITE THIS INSTEAD

#### **History of Present Illness**

Jack B Quick is a 60 y.o. year old male who returns for evaluation and treatment of left knee pain. The patient's symptoms began 3 years ago. The pain is rated as 6/10. Treatment to date has been Injection. Last injection performed last visit (11/18/2020), with good improvement for a couple of months then started wearing off. Since the last office visit the patient states that the symptoms have begun to increase. Patient tells me that he is getting 3 to 4 months of relief from his injections. Patient has no other concerns.

#### Objective

Vital Signs: Resp 16 | Ht 5' 11" (1.803 m) | Wt 132.5 kg (292 lb) | BMI 40.73 kg/m<sup>2</sup>

#### **General Exam**

Extremities: Examination left knee reveals tenderness diffuse over the medial joint line.Edema absent. Effusion absent. Positive crepitus. Ambulates without limp.

Imaging Studies None obtained today.

#### Assessment and Plan

Left knee moderate osteoarthritis with medial meniscal pathology. Patient is doing well with conservative treatment would like to continue with this. He is getting good relief from cortisone injections and like for this be repeated today. He was given intra-articular steroid injection as requested. We will see him back in 3 months for reevaluation (around 6/29/2021).



Available in the health record.

# **FIVE RECOMMENDATIONS FOR EHRs**

- Automate writing in SOAP, and reviewing in APSO
- 2 Combine Patient Instructions and A&P
- 3 Expand abbreviations for patient-facing documents
- 4 Allow linking out to data that is elsewhere in the EMR
- 5 Allow for simple inclusion of discrete exam data

