

# Writing Patient-Friendly Notes

*Sharing notes with patients helps strengthen the provider-patient partnership, enhances patient safety and empowers patients to take an active role in their health and health care. You may keep these suggestions in mind when composing patient-friendly notes.*

## Reinforce the Plan of Care

- **Include topics you discussed** with your patients to help reinforce the plan of care

## Use a Conversational Tone

- **Write your note as if you are speaking** with your patient

## Keep It Simple

- **Avoid excessive medical jargon and abbreviations**, especially ones that might easily be misinterpreted or may offend patients (use “short of breath” rather than “SOB” or “patient chooses not to...” rather than “patient is noncompliant”)
- **Consider briefly defining or simplifying medical terms** (for instance, you might use “short of breath” rather than “dyspneic” and “enlarged heart” rather than “cardiomyopathy” when you think it is appropriate)

## Provide Context

- **Incorporate some key lab or test results** to provide patients with a complete picture of their health, yet try to avoid making the note too long
- **Include educational materials or links** to reliable online sources that can help patients learn more about their diagnosis

## Highlight Patient Strengths/Achievements

- **Focus on the patient’s strengths and achievements** alongside their symptoms and clinical issues to motivate patients toward positive change

## Address Concerns Directly and Respectfully

Be direct and respectful when addressing potentially sensitive topics, such as mental health and illness; obesity; substance abuse; elder, child or spousal abuse; or suspicions of a life-threatening illness. Complement sensitive topics with descriptive terms and a caring tone to avoid labeling and judgment. Suggestions include:

- **Obesity:** Review patient’s body mass index and the definitions for overweight, obese and morbidly obese. Focus on positive changes the patient has made in diet, exercise and weight loss.
- **Possible Cancer:** Outline specific symptoms concerning for cancer and note that you will expedite a referral for prompt diagnosis
- **Substance Abuse:** Explain the connection of substance abuse and the patient’s condition
- **Mental Health:** Acknowledge feelings and use a caring tone. Encourage patients to check in with their counselor.

## Include Patients in the Note-Writing Process

Including your patients in the note-writing process can help avoid confusion and gives patients an opportunity to ask questions while still in your office.

- **Turn the computer screen toward the patient** to show what you are typing
- **Read aloud** what you are typing in the note while the patient is present
- **If using Dragon** to dictate the note, consider dictating with your patient in the room
- **Check for understanding and accuracy** of the note during the visit

*These guidelines have been adapted from an article in The American Journal of Medicine. [Click here](#) for the full article.*