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.*

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