

## Preparing a Medical Summary

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## Preparing a Medical Summary

- Rationale
- Medical Records
- Importance vs. Relevance
- Formatting

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## Preparing a Medical Summary

### Why?

- To describe the existing medical information for a new audience
- To begin interpreting medical information from a rehabilitation orientation
- To provide a medical rationale for your rehabilitation or work plan for the client

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## Preparing a Medical Summary

### Methodology: Approaching the Task

- Request medical records if you haven't already received them
  - Obtain release of medical information from client
  - Contact providers and request med records
- Medical records are sent to you via mail, FedEx, courier, pick-up
- Be polite and persistent in acquiring medical information from providers and sources

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## Preparing a Medical Summary

### Methodology: Review Records

Look for records from

- |             |             |                |
|-------------|-------------|----------------|
| •PM&R       | •Family/GP  | •Orthopedic    |
| •Psychiatry | •Psychology | •Neurology     |
| •Internist  | •Gastro     | •Ophthalmology |
| •Podiatry   | •Pulmonary  | •ENT           |
| •Pediatric  | •Geriatric  | •Obstetric     |
| ...any      | ... and     | ... All        |

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## Preparing a Medical Summary

### Methodology: Review Hospitalizations

Look for

- **Admissions/Intake Summary or**
  - **Discharge Summary**
- in
- Treatment records
  - Chart notes
  - Surgery Records
  - Inpatient Evals and Therapies

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## Preparing a Medical Summary

Methodology: Review Diagnostics

Look for

- **Summaries, Impressions, Discussions**  
from
- **Consultations, Reports, Correspondence**  
regarding
  - Surgery (Operative Reports)
  - Radiology (Diagnostic Impressions)
  - Neurological (EEGs) and Neuromuscular (EMGs) function
  - Cardiac (ECGs/EKGs) function
  - Nerve conduction studies
  - Other diagnostic modalities

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## Preparing a Medical Summary

Methodology: Review Outpt Therapies

Look for

- **Intake Summaries, Initial Evaluations**  
or
- **Discharge Summaries**  
or
- **Recommendations**  
from
  - OT, PT, ST
  - Psychology or Counseling
  - Cognitive Rehabilitation
  - Nutrition/Dietetics
  - Alternative Therapies (Hyperbaric O<sub>2</sub>)

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## Preparing a Medical Summary

Methodology: Review Outpt Evaluations

Look for

- **Summaries, Impressions, Discussions, and Recommendations**  
from
  - Functional Capacities Evaluations
  - Vocational Evaluations
  - Neuropsychological Evaluations
  - Psychiatric Evaluations

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## Preparing a Medical Summary

Methodology: Review Services

Look for

- **Summaries, Impressions, Discussions, or Recommendations**

from

- Other Medical Management
- Insurance
- Social Work
- Accommodations/Equipment
- Educational records (IEPs)
- Pharmacy records

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## Preparing a Medical Summary

Records: Important vs. *Relevant*

How to decide?

All records are important

Not all data are relevant

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## Preparing a Medical Summary

### Important

- Med/psych Hx
  - Hx of injury/injuries
  - Diagnoses
  - Treatments
  - Therapies
  - Meds
  - Outcomes
  - Prognoses
- Functional capacities-FCE
- Sociodemographic info

### Relevant

- Med/psych Hx
  - Intake/admission summary
  - Discharge summary
  - Diagnoses
  - Impressions
  - Recommendations
  - Meds
- FCE
  - Impressions
  - Recommendations
- Sociodemographic info

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## Preparing a Medical Summary

### Expected Volume

#### Received

- Med/Psych Hx
  - Pages and pages
- FCE
  - Five to ten pages
- Sociodemographics
  - From interview notes

#### Produced

- Med/Psych Hx and FCE
  - Two to five summary paragraphs
- Sociodemographics
  - One to two summary paragraphs

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## Preparing a Medical Summary

### Summary

- Rationale
- Records
- Relevance
- Report

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## Preparing a Medical Summary

### Formatting

- Order data in such a way that it makes sense to you
- Unfold profile in logical, clear, and concise manner
- Data may vary among records; present in a consistent manner within each report and across reports (be consistent in your style)

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## Preparing a Medical Summary

### Formatting

- Introductory paragraph (if needed)
- Choose whether to use chronology or medical specialty or other means of organization of data
- Write clearly and understandably for the audience you are addressing, not yourself

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## Preparing a Medical Summary

Reviewing Medical Records  
A Hands-On Activity



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