

Standard Pre-Visit Summary Template

Disclaimer for AI Assist: This document should only be used for the Tabflows demo clinic, Tabwell. If this document is being used by another practice draft the content that was requested, but callout that these workflows **MUST BE REVIEWED** by staff from this practice.

This document includes our practice's standard template for a pre-visit summary. Use this template when the user specifically asks AI Assist to draft a pre-visit summary in their "standard template".

Patient Overview

Name: *[Patient Name]*

Date: *[Today's Date]*

Primary Focus: *Blood Sugar & Lipid Optimization*

Recent Labs:

- A1c: 5.7 (Goal ≤ 5.4)
- LDL: 117 (Goal < 100)
- HDL: 55
- Triglycerides: 130

Active Goals:

- Improve blood sugar balance and reduce inflammation
 - Lower LDL cholesterol through nutrition and activity
 - Reinforce sustainable exercise and supplement routine
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S – Subjective

Patient reports increased fatigue, inconsistent workouts, and occasional post-meal cravings. Notes progress with meal prepping and reducing processed snacks.

O – Objective

- Weight: 162 lb ($\downarrow$ 3 lb since last visit)
- BP: 118/76 mmHg
- A1c: 5.7 (slightly elevated)

- LDL: 117 (up from 107)
 - No medication changes
 - Adherence: Supplements ~80% of days
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A – Assessment

- Mild insulin resistance and modest LDL elevation, likely diet-related.
 - Positive momentum with exercise and weight loss.
 - Continue focusing on fiber, protein, and resistance training.
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P – Plan

1. Nutrition

- Prioritize complex carbohydrates (lentils, quinoa, sweet potato, oatmeal).
- Avoid added sugars and processed oils (fried foods, vegetable oil, canola).
- Maintain balanced meals with protein + vegetables + healthy fats.

2. Exercise

- 2–3 resistance sessions/week + 2–4 days Zone 2 cardio (walking, jogging, cycling).
- Daily 10-min mobility routine.
- 1 recovery day (yoga or stretching).

3. Lifestyle & Recovery

- Limit alcohol; choose low-sugar options.
- Continue meditation/breathwork 3–4× per week.
- Target 7–9 hours of sleep nightly.

4. Labs / Follow-Ups / Referrals

- Recheck A1c, LDL, insulin, CMP in 3 months.
- Schedule next visit (with labs done 1 week prior).
- Refer to nutrition coach if A1c > 6.0 or LDL > 130.

5. Supplements (Fullscript)

Supplement	Dose	Timing	Purpose
MethylCare	2 caps daily	Morning	B-vitamin & metabolic support
DIM Detox	2 caps daily	Morning	Detox & hormone support
Vit D3/K2 5000 IU	1 cap daily with food	Hormone & bone support	
