Professional Practice Brief
PPB – 0120.21

How to Write an Effective Briefing Note

A professional practice brief consists of two major categories, both designed as professional development (PD) tools to advance health information professional practice and standards to support the delivery of quality health care. A PPB may relate to either category or both. The two major categories are as follows:

☑ Guidelines for Practice ☑ Professional Resource

Table of Contents

July 2021

How to Write an Effective Briefing Note

Preface

This professional practice brief (PPB) is intended to guide health information professionals and others looking to write a briefing note. This PPB explains the purpose of a briefing note, describes the types and structures, and guides the user through the process of writing one.

Introduction

A briefing note is a templated document informing decision-makers about an issue by succinctly summarizing the issue and background information while describing key considerations, options to address the issue, and recommended actions (Health Evidence, 2009). It can be defined as a short, concise, and clear document that summarizes an issue effectively, informs through fact-based evidence, and can spur change.

The briefing note is often used for high-level strategic discussions and decision-making. It is also used in administrative settings for instructional or informative purposes. It provides detailed background information to inform the reader of the situation or issue to be addressed. According to Doyle (2013), briefing notes are typically written for senior-level decision-makers who are often tasked with learning and retaining information about a wide range of topics that are constantly changing.

There are various types of briefing notes, each with a specific purpose based on the type of communication. Briefing notes can be written solely to provide information or to provide recommendations and arrive at decisions. The following are the most common types of briefing notes (How to Write Briefing Notes, n.d.):

- **Information Briefing Notes**: "An information briefing note presents facts in a form the audience can easily understand. It does not include conclusions or recommendations, nor does it result in

decisions" (Information Briefing, 2014). This type of briefing note conveys information on a subject such as describing a new policy or initiative, providing a projection, updating on a matter, or explaining an event (Fonberg, 2020). The information briefing note generally focuses on the background, status, and the discussion or analysis (McWhinney, 2016). Ideas are arranged in a logical sequence, from general to most specific, and address anticipated questions from the reader.

- **Direction/Decision Briefing Notes:** The purpose of the decision briefing note is to present decision-makers with the problem and then, based on the research and analysis presented within the note, aid readers to arrive at an answer or decision. This type of briefing note "presents options so the official can make a decision or determine the direction [that needs] to be taken" (McWhinney, 2016, p. 13). The options provided must be valid, relevant, and necessary, and one recommendation must be made, along with the rationale for it. In addition, a request should be made that a decision be provided. If more than one recommendation is feasible, both should be included, along with a summary of the pros and cons of each.

- **Response Briefing Notes:** According to McWhinney (2016), the response briefing note is "used to prepare the minister to speak about issues in the legislature or parliament or in media interviews" (p. 14). Conversely, it is used by health officials for the same purpose. This briefing note typically reviews the issue, explains the background and status, addresses anticipated questions, and finally, provides suggested responses.

- **Meeting Briefing Notes:** This type of briefing note is primarily used to prepare a minister or an official for a meeting. It typically contains meeting details, including the date and time, the agenda, a list of attendees, and may include speaking points (McWhinney, 2016).

The main parties involved in the briefing-note process are the writers, who have the most significant amount of knowledge on the subject; the initiator, who will present the brief; and the decision-

maker/reader for whom the brief is intended (McWhinney, 2016). Depending on the type of brief and the issue at hand, there may be several other parties involved. Stakeholders may be required to provide consultations and subject matter expertise. Other departments and/or organizations may be interested in and benefit from the proposed action items, and staff and patients may be affected by the process and/or budget changes (McWhinney, 2016).

Stages of Writing a Briefing Note

There are four key stages in the briefing-note writing process: planning, research, writing the draft, and finalizing the note. While these stages are different in terms of objectives and outcome, it is important that the production of each section happens somewhat in parallel (Fonberg, 2020).

Planning

The first step in the planning stage is to gain a comprehensive understanding of the problem or issue and gather enough information to determine if the briefing-note format is the most effective way to address the issue. Before beginning the process, the writer must have an extensive understanding of the briefing-note topic, the goal of the brief, and timelines. This knowledge ensures both the content, and the information delivery are appropriate to the topic.

Arguably, this important stage is also the one that requires the most time and attention. It's during the planning stage that the writer establishes the paper's objective; identifies the audience, its level of knowledge of the topic, and how it's prone to consuming information; determines what information needs to be presented, and how that information needs to be structured (Doyle, 2013).

Objective

There are two main aspects to consider when establishing the objective of the briefing note: the desired outcome of the note (e.g., to arrive at a decision, to provide information, or to request input); and then, based on that outcome, what information should be included. The objective captures the strategic content that matters to the reader and links the issue to other events, developments, or decisions

(Graham, n.d.). Without a clear objective, the briefing note may not contain the right level of detail for the reader (Fonberg, 2020).

Audience

Determining the audience is another key step in the planning stage. The writer needs to identify the key stakeholders, decision-makers, and influencers to determine what information to include and at what level of detail. It is important to consider the direct recipients and indirect recipients, which could include those in other departments or organizations who would be impacted by the outcome of the briefing note as well as external parties the reader may consult with (Fonberg, 2020). By identifying the readers, or audience, and determining their current level of knowledge, the writer(s) can ensure they provide the appropriate level of detail within the briefing note.

At this stage, the writer also needs to consider readers' interests, views, and concerns and try to anticipate their reactions. Anticipated questions or concerns should be addressed within the briefing note (Fonberg, 2020).

Contributors

The drafting of a briefing note is a team effort; often, there can be more than one writer, and the document may need to be approved and vetted by multiple levels of management. Furthermore, depending on the topic and the level of impact the brief may have, subject matter experts and stakeholders may need to be consulted. "While the originator of a briefing note may be the best person to initially frame the advice, it will pass through many layers of editing and approval before reaching its reader" (Graham, n.d., p. 3). Key to meeting deadlines is—early in the note planning and drafting stage—identifying all contributors and supplying them with both an outline of their responsibilities and a timeline for deliverables.

Research

The reader does not have the time to do the research; therefore, they need to count on the

writer(s) to provide them with all relevant perspectives on the given issue (Fonberg, 2020). In the research stage, reliable and factual sources of information are gathered, reviewed, and selected. The information needs to be verified and a thorough review of the factual accuracy and relevancy needs to be completed.

Subject matter experts can provide consultation and assist with selecting the most appropriate and pertinent sources. "The decision-makers who read the briefing note need to receive advice based on appropriate research and detailed consultations" (Fonberg, 2020, p. 6). To make a fully informed decision, the reader needs to be confident the information presented is thorough, complete, and accurate.

Drafting

While drafting the briefing note, the writer reviews all facts gathered in the research stage; prioritizes the points by considering what will have the most impact on the reader; and develops a document outline. A review is completed to ensure the key points or issues are addressed and the information selected for use in the briefing note fully supports the argument, suggested outcome, or recommendation. The reader needs to be informed of any missing information or any questions about the information (Doyle, 2013); to ensure the delivery of a credible, fulsome document, rationale must be provided when information is excluded or omitted. Subsequently, the writer needs to review the main objective of the document to ensure the points support that objective and ultimately aid in leading the readers or audience to informed decision-making.

Once the key points are selected, they are added, in point form, to the briefing-note template. Every department and organization may use its own template, "The main sections or elements of briefing notes will vary depending on the purpose and type of note being written" (How to Write Briefing Notes, n.d.).

A well-organized briefing note follows a top-down approach, with the most important information supplied first. While drafting the briefing note, all relevant points raised in the analysis and research should be included, however, organizing the points according to the level of their expected impact and relevancy

creates a more persuasive document (Fonberg, 2020).

While there is no one set style for the briefing note, there are a few key points to keep in mind. The note is a very short document, ideally no more than two to three pages. When it comes to supplying information to senior leaders with busy schedules, less is more: many don't have time to read briefing notes longer than two pages (Mitchell, 2021). Include only content that is directly relevant to the topic, keep sentences short and to the point, and use simple, jargon-free language (Miscampbell, 2021).

While many sections of the briefing note are written in point or bullet form, some sections can be written in paragraph form. When writing a paragraph, there are two types to consider for a briefing note: analytical and narrative. Analytical paragraphs describe the strategy or the argument through the expression of an informed opinion; a complex idea is presented in a series of points, and an argument is posited, defended by rationales. In an analytical paragraph, the connections between ideas may be presented in cause-and-effect relationships. Narrative style, on the other hand, explores past, present, or future events with more focus on explaining detailed background information of the event, situation, or issue. This style typically features a chronological or linear format (Fonberg, 2020).

Finalizing

Once a draft of the briefing note is complete, it is essential to review it for content, clarity, grammar, and language. It is crucial to keep in mind the value of using simple vocabulary; avoiding repetition; and removing any jargon, acronyms, or technical terms (Fonberg, 2020). It should be noted, too, that a briefing note conveys professional advice—not personal opinions.

During the review, focus on shortening and condensing sentences and removing extra words where possible. Conciseness and clarity are essential features of the briefing note. Use specific, accessible vocabulary and group together those sentences and points related in meaning (Fonberg, 2020). Reviewing of key points to ensure relevancy to the issue/topic is imperative; and so is the removal of anything that is not contributing to the overall goal of the briefing note. A document that lacks focus and fails to build

connection with readers results in too much work for readers in their attempts to understand the content presented (Doyle, 2013).

To ensure sentences and paragraphs are well written and well-formed, the writer can use the following techniques: (Fonberg, 2020)

- Emphasize major points and key issues

- Vary word order to avoid repetition and maintain reader interest

- Vary sentence length and turns of phrase

- Use connecting words and linking expressions, which help create transitions and ensure the text flows

- Ensure content is relevant and to the point

- Avoid acronyms, technical language, and organizational terms

- Avoid side issues, insider references, and complicated language

Finally, review the document and consider if it takes into account the perceived perspective of the reader, not just that of the writer. (Mitchell, 2021). The aim is to inform readers and encourage them to endorse the objective. A review of the briefing note considering the reader's perspective helps determine whether the content, style, and tone may resonate with readers. The focus should be on the reader's needs, not the writer's desire to be stylistically or substantively outstanding (Graham, n.d.).

Upon completion, the briefing note is submitted to the appropriate person for approval; often, there are multiple levels of leadership approving a brief. At this point, the writer needs to be prepared to address questions, make clarifications and adjustments, or entertain discussions with senior leadership (Fonberg, 2020).

Briefing Note Structure

There are various structures of briefing notes; the format and layout will vary depending on the author, audience, topic, and type of brief. In most cases, briefing notes follow a set format as outlined by

a given organization; there is little departure from the form (Graham, n.d.).

When writing a briefing note, the importance of a strong writing style and technique cannot be overemphasized, but the key marker of success is ensuring the brief has a succinct focus that outlines the full context of the topic being explored.

The note is comprised of three main sections: the introduction, body, and conclusion. These main parts are included in the sections and subsections of the brief template. Within each of these sections, there will be subsections that vary depending on the content of the brief and the format of the organization's briefing-note template.

The introduction should state the motive and the purpose of the briefing note and explain why it should be read. This section presents the issue, key facts, and, most importantly, the writer's advice and recommendations (Mitchell, 2021). This section contains the core content of the brief and provides the reader with all the pertinent details they need to consider. The reader's attention must be captured here; otherwise, they may not continue to read the rest of the briefing note.

The body of the briefing note is typically comprised of multiple subsections; the format depends on the content (How to Write Briefing Notes, n.d.). This section describes the issue through research findings and provides the key points and facts required for and presented in such a way as to enable readers to make recommendations or decisions. Variables, options, considerations, and potential risks are discussed within the body of the briefing note. (Fonberg, 2020). It is here that arguments, alternatives, advantages and disadvantages, should be considered and addressed.

The conclusion should concisely summarize the main points, present relevant perspectives from identified stakeholders, and address the arguments or recommendations. Recommendations should be feasible, straightforward, and to the point; the proposed solution should be obvious to the reader. The primary purpose of a briefing note is to convince others to assist with and agree on the issue and help with its resolution; potential solutions should be presented in a persuasive manner. In addition, the

conclusion should also address any possible consequences for taking or not taking action (Fonberg, 2020). A good conclusion addresses next steps by proposing the best course of action. Any request for a decision or approval should be clearly and concisely stated. The decision-maker needs to know exactly what they are being asked to do (Fonberg, 2020).

It is key to remember that any briefing note only has sections that are relevant to the specific purpose and audience (Doyle, 2013). The headings most commonly used in a briefing note (and which are included in the Sample Briefing Note Template in Appendix A) are:

Title: The briefing note title should be self-explanatory, informative, and describe the type of brief and the topic being addressed. When a briefing-note identifier is issued, such as a number, this would also be included in the title (Health Evidence, 2009). By accurately describing the topic of the note in a title, the reader immediately understands what the document is about (Fonberg, 2020).

Issue Statement: Also referred to as the topic, purpose, or issue, the issue statement introduces the brief. It is a concise summary of the issue, problem, or proposal being addressed and should highlight why the brief should be read. The issue statement can be posed as either a statement or a question and should be no longer than one to two sentences (Health Evidence, 2009). The issue statement aims to capture the reader's attention and inspire interest in the topic.

Summary: The summary, or introduction, is optional, and if included, should succinctly explain the situation and content of the brief. It expands on the Issue Statement by addressing the issue, the proposed action, the rationale behind the proposed action, and the urgency of the situation (Fonberg, 2020).

Background: The background provides the reader with the results of the analysis of the issue and includes the following:

- How the situation arose

- A history of previous problems or decisions

- Actions that have already been taken

- Events that led to the problem or issue

- Details on how the current issue has evolved (Health Evidence, 2009)

This section provides readers with the details required to understand fully how the current problem arose and what, to date, has been done to address it. In addition, the background presents the positions of various stakeholders and speaks to other similar issues, if they exist. The key events should be provided in chronological order, starting with the most recent events, and ending with the oldest (Fonberg, 2020). It is important to note that this section should not include information that will be provided in the Current Status section.

Current Status: This section outlines what is happening right now with regards to the matter; details who is involved; and highlights any actions currently being taken (Doyle, 2013). This section describes only the present state of the matter and does not speak to the past or future.

Key Considerations: This is a summary of the facts, developments, and evidence that need to be taken into consideration (Doyle, 2013). Include only the details that will help lead readers to an informed decision. The reader's needs are the priority when determining what information to include, and their current level of knowledge and position on the topic need to be considered as well. This section also presents the pros and cons and should draw inferences about the issue in an unbiased manner.

The evidence provided will vary depending on the issue but generally will be comprised of both scientific and research-based evidence, as well as colloquial evidence. This can include evidence from organizations, the health care sector, subject matter experts, legislation, and the community (Health Evidence, 2009). All statements must be substantiated and supported by fact, while additional or contributing details can be attached to the brief as appendices.

Options: The options section of the brief provides readers with the possible courses of action. Based on the key considerations, each viable option should be explored, detailing what the option is, what implementing that option would entail, the pros and cons, the impact, and next steps (Doyle, 2013). A

fulsome understanding of the issues and repercussions that could result from each option must be demonstrated, along with addressing the feasibility of each option. To add consistency and credibility, rely on consistent criteria when evaluating and presenting possible options. It is recommended that any relevant alternatives that were not previously included are presented, along with an explanation as to why they were dismissed (Fonberg, 2020). Alternatively, if no options or only one option exists, provide an explanation as to why (Graham, n.d.); and avoid including unrealistic or non-viable options for the sole purpose of providing additional options.

Recommendation: Also referred to as the conclusion or action, the recommendation offers a summary of the main points, reiterates the purpose of the briefing note, and states the proposed course of action. This solution should be clear, concise, and substantiated by the facts provided within the briefing note (Doyle, 2013).

The advice provided in this section represents the writer's opinion and should align with the detail provided in the summary of the briefing note (Graham, n.d.). In addition to the recommendation, this section should include proposed timelines and next steps, should the reader choose to proceed.

It is imperative that the requested course of action is clear to the decision-maker and that the briefing note provides enough information to enable a well-informed decision (Fonberg, 2020). In addition, where required, next steps and action items should be provided in a clear and straightforward manner.

Many readers choose to skip to the recommendation section, so the recommendation and the possible consequences for both acting and not acting must be clear, direct, and substantiated by the facts (Health Evidence, 2009). This section must cover all the points the reader needs to be aware of in order to make an informed decision.

Role of HIM Professional

In the health care industry, briefing notes can be used to address and provide information on legislative and policy change; request decision making on financial, fiscal, organizational, and process change; and inform on a variety of topics. While decision-making is typically reserved for senior-level management and boards of directors in the health care industry, Health Information Management (HIM) professionals may be called on in various ways to lend to the development of briefing notes. An example of a potential financial decision-making briefing note from a health information management perspective is shown in Appendix B.

HIM professionals may participate on a team involved in developing proposals, research papers, and budgets or participating in the review and self-assessment of accreditation standards. They must be able to recognize trends and understand the changes that affect health information within the health care system (Learning Outcomes for Health Information Management, 2015, p. 8). HIM professionals' extensive knowledge of the health care industry enables them to contribute to briefing notes in a variety of ways. Examples of this are:

- Research: HIM professionals can be responsible for extracting data from the health record, providing statistics and analysis on various data sets.

- Background Information: HIM professionals can provide insight on data collection and grouping, data quality, records management, departmental procedures, privacy legislation, and data analytics.

- Subject matter expert: In some cases, the HIM professional can be called upon to assist with the research stage, the writing process or to review the document for accuracy.

As stated by Abrams (Cited in Learning Outcomes for Health Information Management, 2015, p. 10) HIMs can assist with the "translation of data into usable forms of information for the advancement of health and health care of individuals and populations." The briefing note is an invaluable tool that can be

used in the health sector to convey vital information, express ideas, recommend a change, and identify and analyze issues.

As demonstrated above, the briefing note structure, style, content, and use can vary greatly depending on the situation, audience, organization, and sector. The briefing note is a tool that provides the writer with the means to produce a professional, unbiased, concise document that informs on an issue, and, when required, effectively leads decision-makers to select the best course of action through well-informed and supported decision-making.

References

Doyle, S. (2013). *How to write a briefing note*.

https://web.uvic.ca/~sdoyle/E302/Notes/WritingBriefingNotes.html.

Fonberg, R. (2020, June). *Practical Guide to Writing a Briefing Note in the Government of Canada*.

https://uwaterloo.ca/defence-security-foresight-group/sites/ca.defence-security-foresight-

group/files/uploads/files/dsfg_policy_brief_writing_guide_v2.pdf.

Graham, A. (n.d.). *GovTalk Get to the Point*.

https://www.queensu.ca/sps/sites/webpublish.queensu.ca.spswww/files/files/Resources/GovTal

k/1_1Style%20Guide%20.pdf.

Health Evidence Briefing Note: Decisions, Rationale and Key Findings Summary. (2009, November 25).

https://healthevidence.org/practice-tools.aspx#PT6://uwaterloo.ca/defence-security-foresight-

group/sites/ca.defence-security-foresight-

group/files/uploads/files/dsfg_policy_brief_writing_guide_v2.pdf.

How To Write Briefing Notes. (n.d.). https://www.publicsectorwriting.com/?page_id=6.

Learning Outcomes for Health Information Management (Version 3). CHIMA. (2015, June).

https://www.echima.ca/wp-content/uploads/2019/10/LOHIM_V3-June-2015.pdf.

McWhinney, H. (2016). *Writing A Briefing Note*.

https://www.schoolofpublicpolicy.sk.ca/students/resources/useful-links-and-

documents.php#JSGSdocuments.

Miscampbell, G. (2021, March 6). *Writing a Briefing Note*.

http://www.atlas101.ca/pm/concepts/writing-a-briefing-note/.

Mitchell, J. R. (2021, March 5). *How to Write a Briefing Note*. Atlas of Public Management.

http://www.atlas101.ca/pm/wp-content/uploads/2021/03/How-to-Write-a-Briefing-Note-James-

Mitchell-2021.pdf.

Appendix A

Sample Brief Template

Name of Organization

For: Approval   Input   Information

MEMORANDUM TO _____ (Who the brief has been prepared for – organization or individual)

Title of Briefing Note (OPTIONAL: Briefing Note #)

Issue Statement:	Explains in one or two sentences the topic or issue of the brief. The goal is to capture the readers attention and convince them to keep reading.
Summary (OPTIONAL):	Expands on the Issue Statement by indicating the urgency of the situation, what the proposed action is, and the rationale behind the proposed action.

Background:

- Summary of:
- How the situation arose
- A history of previous problems or decisions
- Actions that have already been taken
- Events that led to the problem or issue
- Details on how the current issue has evolved

Current Status:

- What is happening now – what is currently being done
- Who is involved
- What is the current state of the matter

Key Considerations:

- A summary of the facts, developments, and evidence to be taken into consideration
- Include pros and cons
- Include evidence gathered from organizations, the health care sector, subject matter experts, legislation and from the community
- Prioritize points by impact and relevancy

Options:

- List all viable options along with supporting rationale; explain why each option is being presented and the feasibility and possible repercussions of each.
- If any options were omitted from the brief note, explain why

Recommendation:

- Provide a brief summary of the main points and the purpose of the document
- Highlight the proposed course of action — provide evidence and facts to support this option
- If seeking approval, clearly state that approval is being requested
- Include any next steps and/or action items

Submitted by: _____ (Name) _____(Contact Information)

Submitted to: _____(Name) _____(Contact Information)

Appendix B

Executive Team Briefing Note

To: Executive Team
From: <<Insert name of Leader bringing BN forward>>
Date: March 15, 2021
Re: SAN Migration

Decision   Input   Information

Situation: (Brief Explanation of the Current Issue)

The current <<Insert name of current model>> Storage Area Network (SAN) is reaching EoSL (End-of-Service-Life) and will no longer be supported by the vendor as of December 2021. The SAN currently fulfills the data storage needs of the entire organization including email, user/departmental files, and server attached storage.

Background: (Overview of Relevant History including previous attempts to address issue)

A SAN is a dedicated network for data storage. In addition to storing data, SANs allow for the automatic replication of data, data redundancy, the monitoring of the storage as well as the backup process. A SAN is a combination of hardware and software. <<Insert name of Health Organization>> uses <<Insert name of current model>> SAN as part of its strategic IT infrastructure. The <<Insert model name>> currently provides the majority of the storage required by <<Insert name of Health Organization>> File and Application servers. It was originally purchased in November 2014 as part of a lease agreement between <<Insert distributor name>> and <<Insert Leasing Company name>>. The SAN was then leased back to <<Insert name of Health Organization>> with an end date of December 2019. The current monthly charge for both the capital equipment and the ongoing support was approximately $3,800.00 per month with a buyout value of $1.00. That lease payment schedule terminated in December 2019, and the SAN then became the property of <<Insert name of Health Organization>>.

Assessment: (Your objective assessment of the situation after consideration of the background and current context)

As part of IT's capital budget submission for 2019/2020, it was identified that a migration would need to occur that would transfer the storage currently on the <<Insert name of current SAN>> to the newer and faster <<Insert name of new SAN>>. The <<Insert name of new SAN>> currently has 11.6 TB storage with 4.5 TB free. This needs to happen before December 2021, as it poses a risk to the organization to have a critical component of the IT infrastructure in an unsupported state. In addition to the SAN equipment, we also need to replace the Fiber Channel Switches that provide the connectivity between the SAN itself and all the devices requiring access to the disk drives such as application servers and virtual file servers. Included in the requirements are an upgrade to the <<Insert name of current HIS>> O/S. The <<Insert name of new SAN>> has support for the existing configuration paid up until March 2022 as part of the original purchase. The capacity of the new SAN should include multi-year support on all components and include not only useable space for all the data migrated from the <<Insert name of current SAN>> but also allow for at least 2 years of organic

growth.

Recommendation: (Your objective assessment of the situation after consideration of the background and current context)

The data currently stored on the <<Insert name of current SAN>> needs to be moved to a supported platform as it comprises a critical component of the IT infrastructure, including the data for the <<Insert name of current HIS>> EMR. It is essential that the storage for all <<Insert name of Health Organization>> systems is on infrastructure that is supported and provides a level of availability to allow for continuous access and redundancy to protect from data loss. The attached quote allows for 5 years support on all hardware and software components including subscription services to allow for the software and firmware upgrades to remain current. It also includes the Professional Services required to complete the migration.

The recommendation is to have the migration included in the 2020/2021 capital budget or as a capital lease item. The cost for the migration, including additional disk space, new FC switches, Professional Services and the <<Insert name of HIS>> upgrade is approximately 251K. The cost for the lease option over a 5-year term will be approximately $4,850.00/month

Special Thanks to the Authors and Reviewers

Authors:

Danielle Dalziel, HIM Student

Kanwal Javed, M.D., MBA Exec, HIM Student

Reviewers:

Tiffany Jones, BA

Andrew Quayle, BA, CHIM

Maria Muia, MHSc, BHA, CHE, CHIM

R. Eric Sutherland, M.Math

Editors:

Paula Weisflock, BHA (HIM), MAEd, CHIM

Suvathe Kulenthiran, HBSc, CHIM

Tracy Picha, MA

For more information:

To learn more about this or any other professional practice brief (PPB), including how to earn continuing professional education (CPE) credits from their use, please contact the Canadian Health Information Management Association (CHIMA) at:

Email: general@echima.ca

Tel: 519-438-6700   Toll free: 1-888-402-4462   Website: www.echima.ca

The publication of professional practice briefs (PPB) is a lengthy process due to the time it takes for authors to complete their research and write a draft of the brief. Subject matter expert reviewers are then called upon to review the PPB and provide feedback to the authors to consider incorporating into their work. Information within the PPB is deemed current at the time of writing, though new information is always coming available and readers should take this into account. The content within this PPB reflects the opinions of the professionals who developed it. Scientific validation through research is not a part of the process. The links within this publication were current and valid as of the date of creation; however, webpage addresses and the information on them may change at any time.