

Clarifying the Purpose of the Executive Summary

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January/February 2009

When multidisciplinary assessments are scheduled, sometimes the insurer also requests an Executive Summary. The purpose of the Executive Summary is to act as a reference tool for the insurer. It begins by stating the purpose of the assessments (i.e., the disability test question), as well as the type of assessments performed, assessor names, and the date of each assessment.

Next, it provides background information about the motor vehicle accident and the client's history. After this background information, the Executive Summary then provides an overview of the findings from each assessment. This overview concludes with the answer to the disability test question.

By summarizing the findings from each assessment in one report, the Executive Summary substantiates the conclusion/answer to the disability test question. For example, in cases where consensus is reached, the consensus opinion is stated in the Executive Summary. In cases where there is no consensus, specific findings indicate why not.

Consider the Executive Summary as a reference tool that *compliments* the multiple reports. Based on the summary of the findings in the Executive Summary, each report can then be reviewed within this context to learn the in-depth details provided in each assessment report.

To be useful as a reference tool it is important that the Executive Summary is brief (e.g., maximum 2-3 pages) and accurate, including correct names and assessment dates, and that it includes valuable summary information.

Please see the attachment for an overview of what should be included in a useful Executive Summary.

Making sure the Executive Summary works for you as a useful Reference Tool

To be useful, it is important that the Executive Summary is brief and accurate and includes the following information:

<ul style="list-style-type: none">• Purpose of the Assessment / Disability Test Question
<ul style="list-style-type: none">• Listing of each assessment conducted, assessor names and assessment dates
<ul style="list-style-type: none">• Description of the motor vehicle accident and client history using direct quotes from the reports (e.g., education/employment, complaints, treatment)
<ul style="list-style-type: none">• Brief summary of the findings from each assessment
<ul style="list-style-type: none">• Answer regarding the Assessment Purpose / Disability Test Question