

Referral Cover Sheet

Patient: Avery Morgan
Date of Birth: 04/17/1981
Referring clinician: Dana Patel, MD
Destination: Cardiology Associates Intake Desk
Reason: Evaluation of intermittent palpitations and exertional shortness of breath.

Please review the attached visit summary, current medication list, and recent lab results. Patient reports symptoms beginning approximately six weeks ago, with no syncope and no current chest pain.

Requested follow-up: non-urgent cardiology consultation within 2-3 weeks. Please fax appointment confirmation to the referring office.

Office Notes

Insurance authorization not required for initial consult. Patient prefers morning appointments.

Visit Summary And Vitals

Visit date: 05/01/2026
Chief concern: Palpitations, fatigue, shortness of breath with stairs
History: No known prior cardiac disease. Family history notable for hypertension.

Metric	Value	Reference	Status
Blood pressure	128/78	Normal	Monitor
Heart rate	84 bpm	60-100	Normal
Oxygen saturation	98%	>=95%	Normal
Weight	168 lb	Prior 166 lb	Stable

Assessment: symptoms are intermittent and stable. ECG in office showed normal sinus rhythm. Patient was advised to seek urgent care for chest pain, fainting, or worsening shortness of breath.

Plan: cardiology referral, consider ambulatory rhythm monitoring, continue hydration, reduce excess caffeine, and bring symptom log to specialist visit.

Medication And Lab Snapshot

Medication	Dose	Frequency	Notes
Lisinopril	10 mg	Daily	Long-term
Vitamin D3	1000 IU	Daily	OTC
Albuterol inhaler	90 mcg	As needed	Rare use

Lab	Result	Range	Date
TSH	2.1	0.4-4.0	04/22/2026
Hemoglobin	13.7	12.0-15.5	04/22/2026
Potassium	4.2	3.5-5.1	04/22/2026
Creatinine	0.9	0.6-1.2	04/22/2026

Signature

Dana Patel, MD