Welcome & Introductions

Liz Salmi
Senior Strategist, OpenNotes

Beth Israel Deaconess Medical Center

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Open Notes in the Safety Net

1. **Quick background** on open notes
2. **Sharing Notes at the Institute for Family Health** with Nandini Shroff, MPH & Ruth Lesnewski, MD
3. **Q&A**

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OpenNotes

Who is OpenNotes & what is open notes?

Cait DesRoches, DrPH

Executive Director, OpenNotes

Associate Professor of Medicine, Harvard Medical School

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WHO IS OPENNOTES?

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GORDON AND BETTY MOORE FOUNDATION

CAMBIA health foundation

PETER G. PETERSON FOUNDATION

The Commonwealth Fund

crico

Robert Wood Johnson Foundation

WHAT IS OPEN NOTES?

When patients can easily read visit notes.

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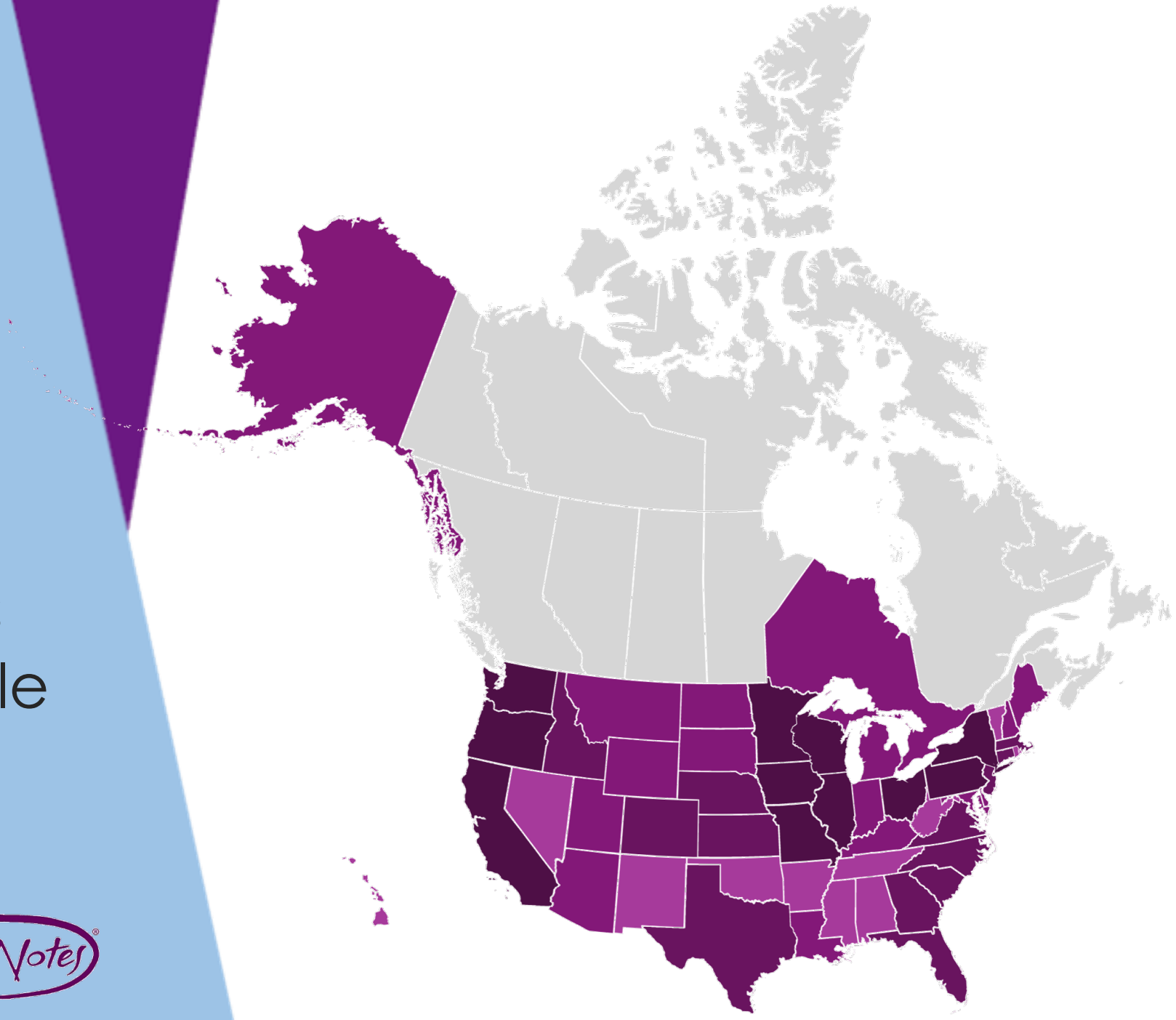
Open Notes Across North America

- ✓ **260** organizations
- ✓ **54 MILLION** people



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April 5, 2021

An official website of the United States government Here's how you know

ONC's Cures Act Final Rule

MENU

Home > Final Rule Policy > Patient Access

Empowering Patients in the U.S. Health Care System

Patients in the U.S. need better access to information about their care – information ranging from their medical records to data about the costs and quality of the care they receive.

The Cures Act aims to empower Americans with their health data, delivered conveniently to computers, cell phones, and mobile applications.

Nationwide, patient-centric health IT, once achieved, can deliver a variety of benefits to patients, including:

- Transparency into the cost and outcomes of their care
- Competitive options in getting medical care
- Modern smartphone apps to provide convenient access to their records
- An app economy that provides patients with innovation and choice

Under HIPAA, patients already have a legal right to their data electronically. The ONC Cures Act Final Rule is one step in this process by enhancing access to clinical data.

USCDI

Clinical Notes *NEW

1. Consultation Note
2. Discharge Summary Note
3. History & Physical
4. Imaging Narrative
5. Laboratory Report Narrative
6. Pathology Report Narrative
7. Procedure Note
8. Progress Note

https://www.healthit.gov/curesrule/final-rule-policy/empowering-patients-us-health-care-system

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Federal "Preventing Harm Exception"

(See 45 CFR § 171.201)

- There are 4 scenarios in which a provider may block information under the "Preventing Harm Exception".

- Under **each** of these 4 scenarios:

  - The provider must reasonably believe that blocking access to information will substantially reduce the risk of harm to the patient or another person.

  - Blocking access to information should be no broader than necessary to substantially reduce the risk of harm.

Sharing Notes at the Institute for Family Health

Nandini Shroff, MPH
Research Committee Administrator
and Grants Manager,
The Institute for Family Health

Ruth Lesnewski, MD
Clinical Director,
MyChart MyHealth,
The Institute for Family Health

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IMPLEMENTING OPENNOTES

Ruth Lesnewski, MD

Nandini Shroff, MPH

THE INSTITUTE FOR FAMILY HEALTH

Who We Are

- The Institute has 32 sites across New York City and the Mid-Hudson regions
- Provide primary care, mental health, and dental to over 115,000 patients annually
- EHR System: Epic since 2003
- OpenNotes Rationale:
  - Increased engagement in care
  - Improve health outcomes

Patient Profile

- Primarily serve the medically underserved population
  - 29% identify as Black/African American
  - 38% identify as Hispanic/Latino
  - 12% are aged 65 and older
  - 13% speak a language other than English
    - 7% of our active MyChart users indicate Spanish as their primary language
  - Insurance
    - 48% have Medicaid
    - 13% are uninsured

OpenNotes Implementation

- Share notes across five Institute departments:
  - Primary care
  - Behavioral health
  - Dental care
  - Nursing
  - Social support services
- Planning phase: Year 1 (August – July)
  - Qualitative focus groups with patients
  - Staff trainings
  - Complete technical build
- Implementation & post-implementation phase: Year 2
  - Go-live
  - Feedback (surveys and data reports)

Pre-Implementation Activities

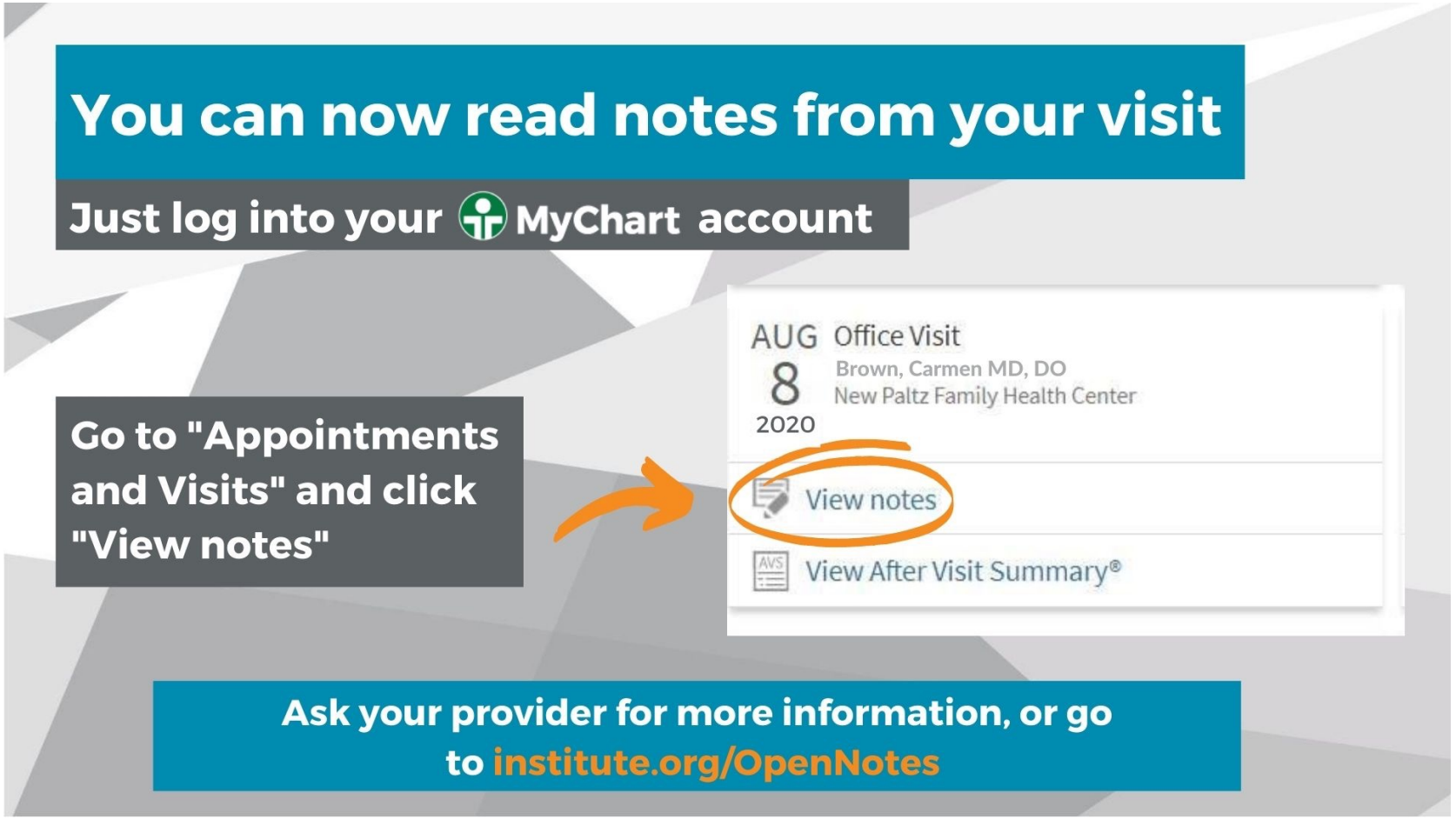
- 3 focus groups across our NYC sites
  - 13 participants in total
  - Findings
    - Increased transparency; better communication; more informed about their care
    - Concerns regarding privacy, language used by providers, shorter/non-comprehensive notes
- Trainings
  - Utilized and adapted materials from the OpenNotes website: PowerPoint presentation, a one-pager (OpenNotes by Numbers), and a brief "Info Sheet" for reference
  - Presented on OpenNotes at 17 different meetings with a total of 170 participants
  - Provider concerns around increased workload

Implementation

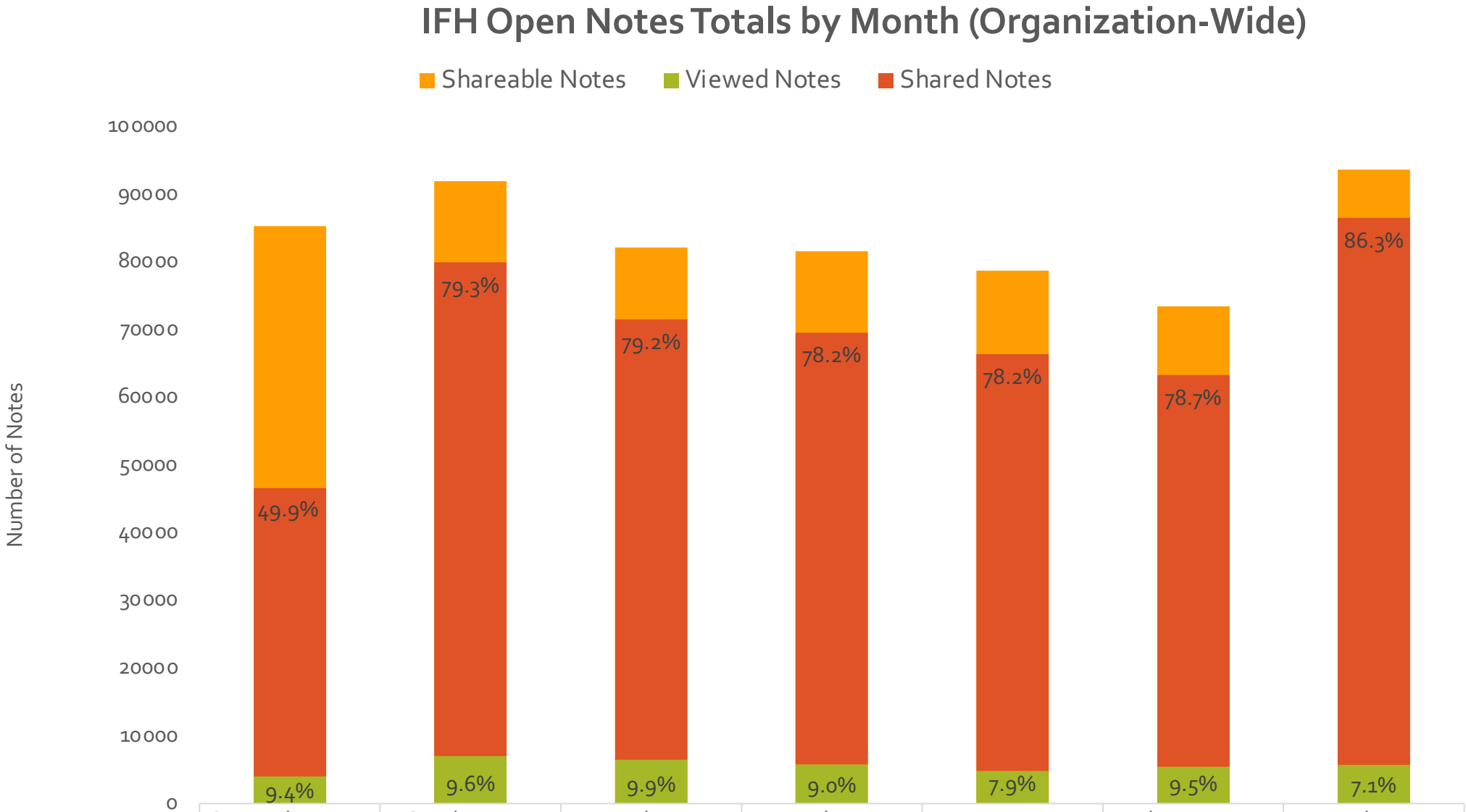
- Go-live date: September 12, 2020
- As of April 2021, all providers have to state a reason for not sharing notes

Implementation

- Developed promotional materials for patients , including a "TV slide" and patient FAQs about OpenNotes

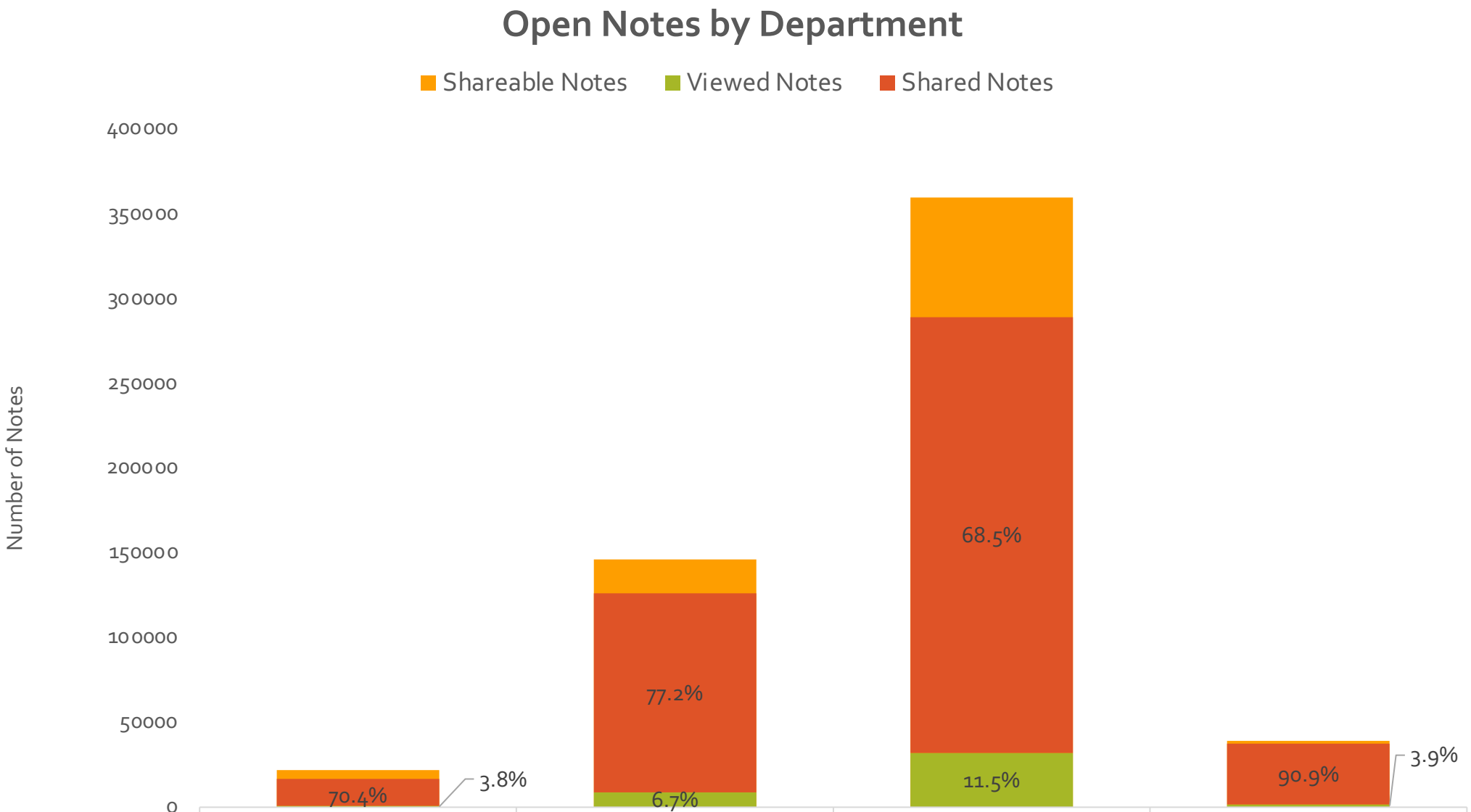


Data & Trends



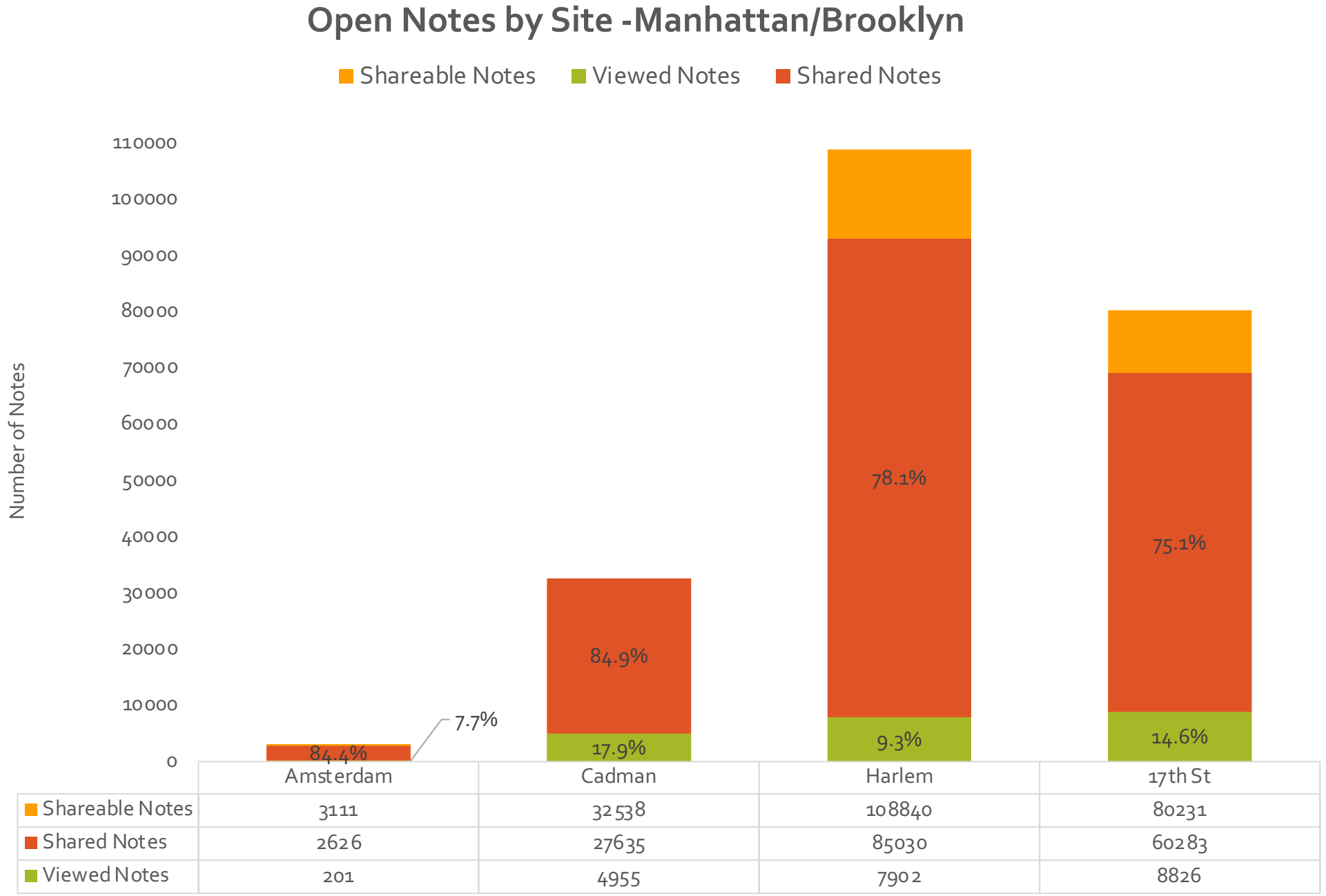
	September 2020	October 2020	November 2020	December 2020	January 2021	February 2021	March 2021
Shareable Notes	85269	91940	82114	81581	78683	73452	93638
Shared Notes	42590	72910	65053	63784	61524	57815	80813
Viewed Notes	3996	7005	6441	5760	4852	5471	5714

Data & Trends



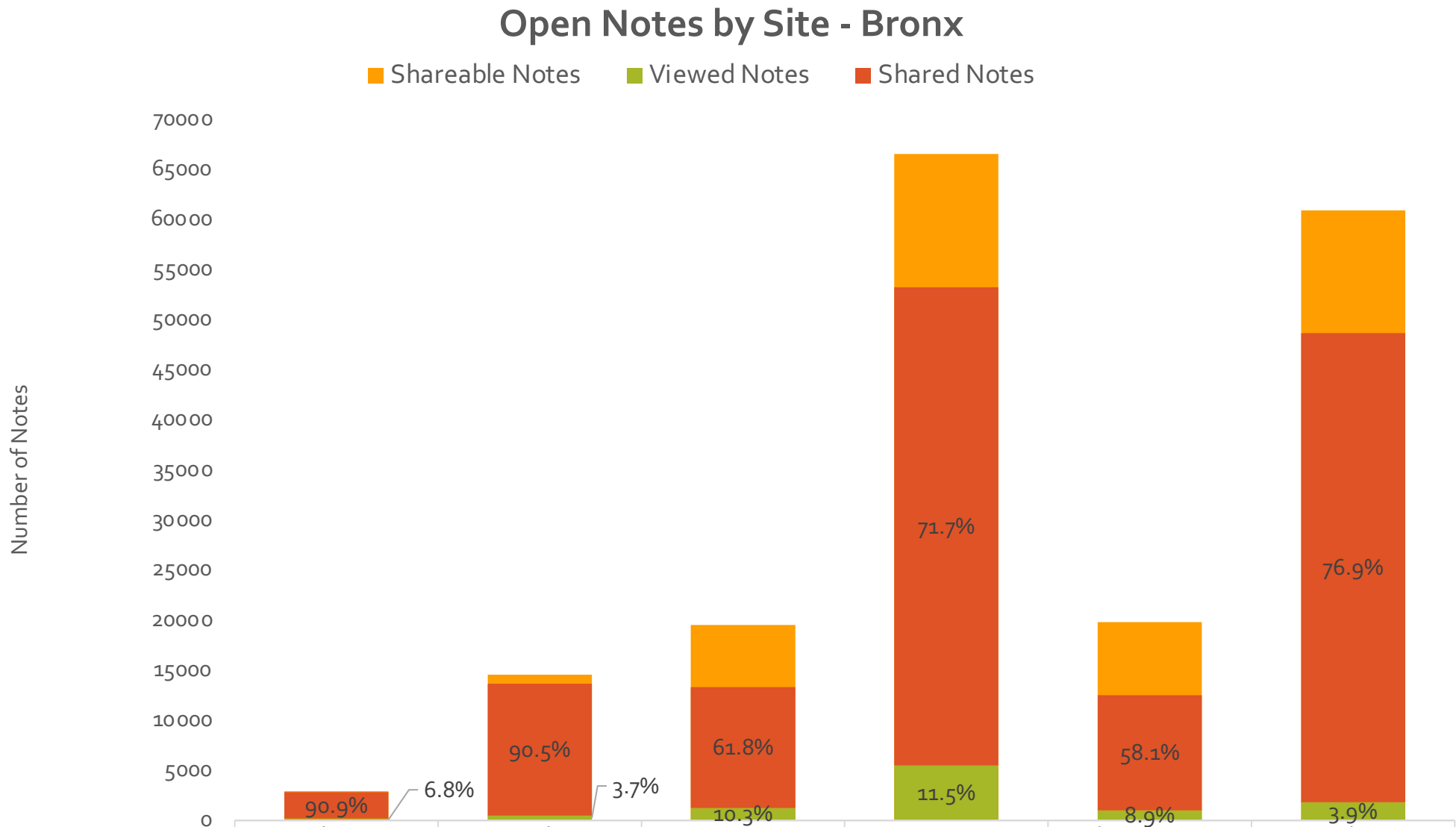
	Care/Case Management	Behavioral Health	Primary Care	Dental
Shareable Notes	21954	146055	359718	39054
Shared Notes	16010	117427	256831	35779
Viewed Notes	692	8708	32141	1680

Data & Trends



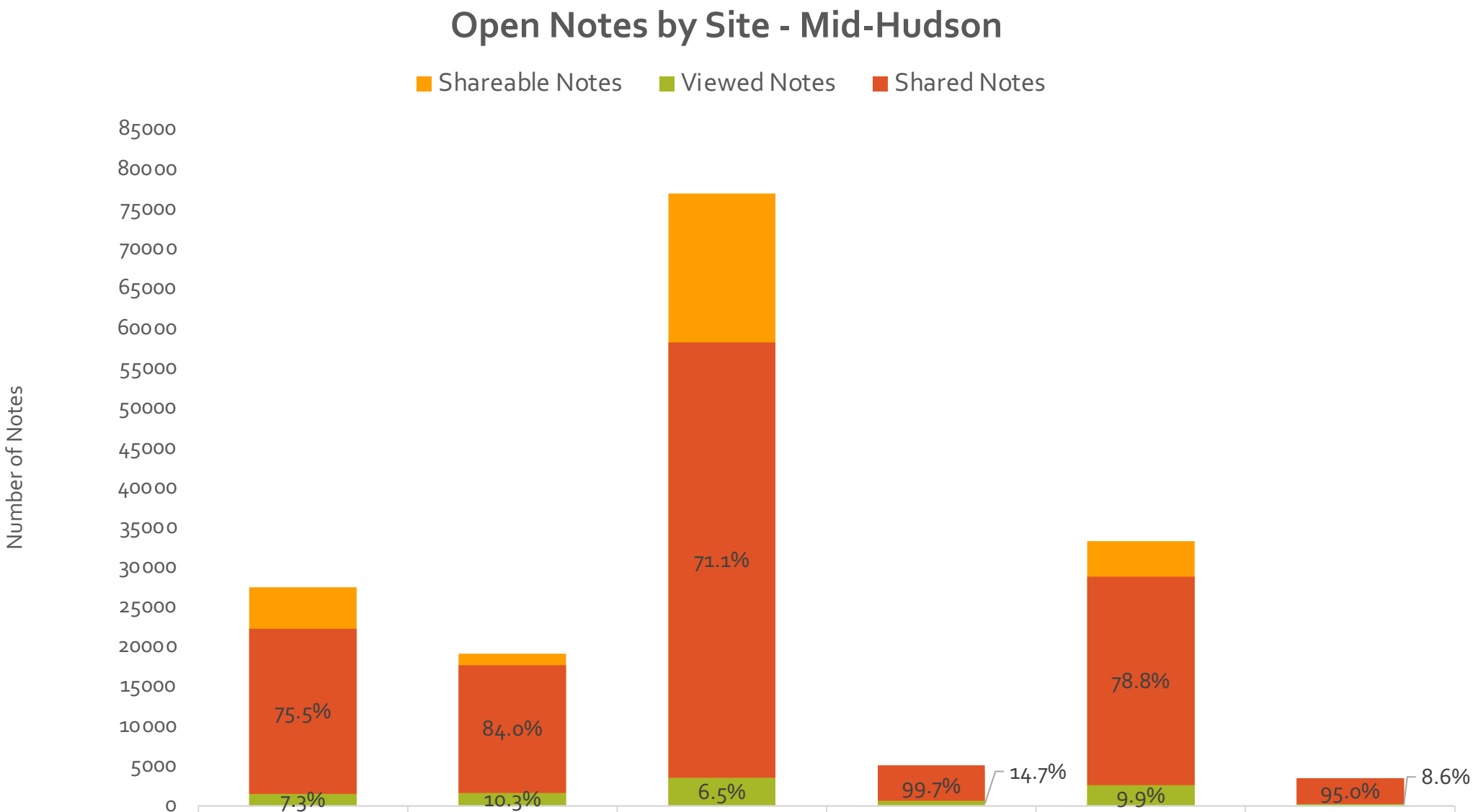
	Amsterdam	Cadman	Harlem	17th St
Shareable Notes	3111	32538	108840	80231
Shared Notes	2626	27635	85030	60283
Viewed Notes	201	4955	7902	8826

Data & Trends



	Westchester Sq	Frisby	Mt. Hope	Stevenson	Urban Horizons	Walton
Shareable Notes	2899	14570	19536	66585	19818	60934
Shared Notes	2635	13181	12075	47740	11506	46859
Viewed Notes	178	492	1246	5498	1021	1811

Data & Trends

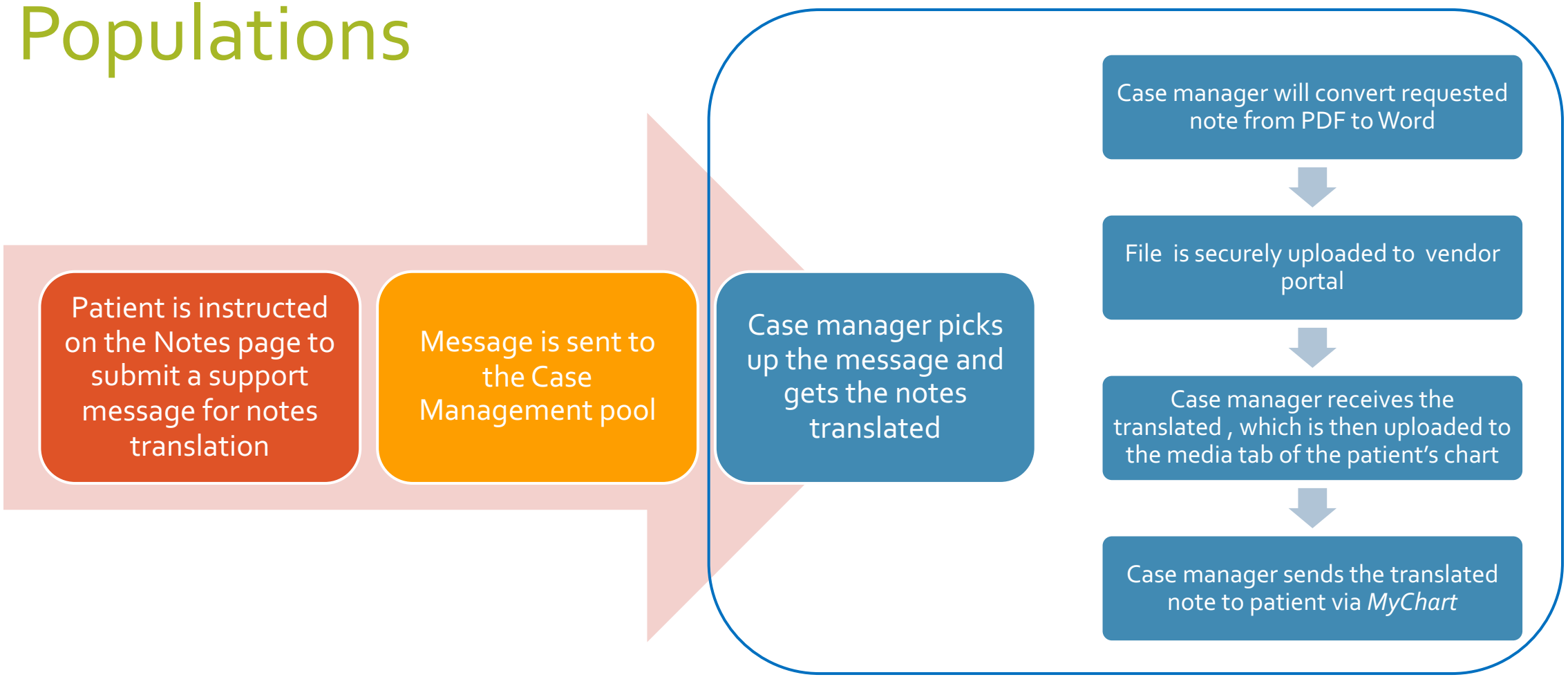


	Ellenville	Hyde Park	Kingston	Kingston SCC	New Paltz	Port Ewen
Shareable Notes	27470	19112	76946	4484	33263	3370
Shared Notes	20752	16049	54702	4471	26203	3200
Viewed Notes	1521	1660	3567	657	2603	274

Anecdotal Feedback

- Overall, no concerns raised from either staff or patients
- Providers
  - Less feedback from patients than anticipated
  - Transition to shared notes fairly seamless
- Patients
  - Feel good about having access to certain parts of their notes
  - Raise their notes during appointments

OpenNotes for Non-English Speaking Populations

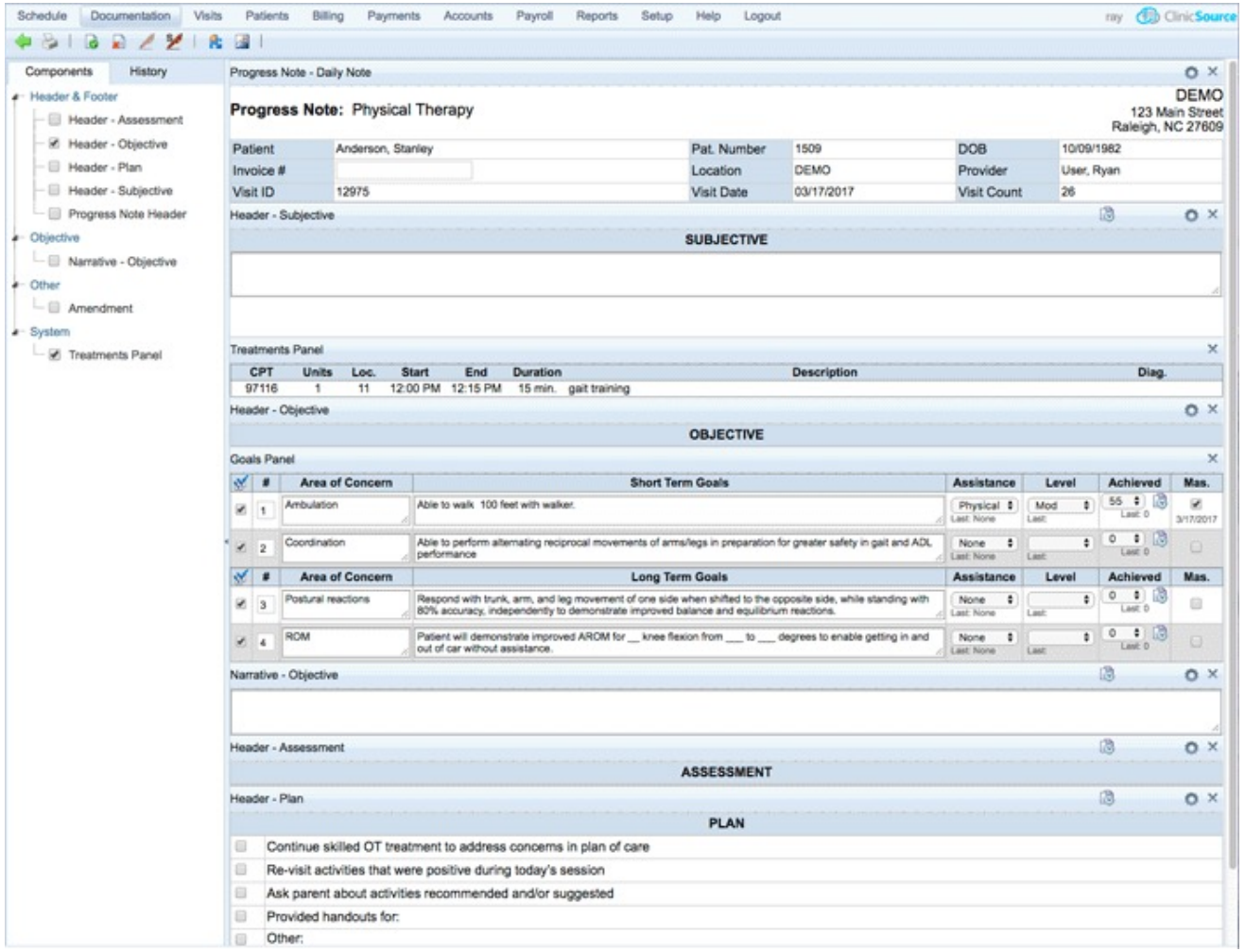


Challenges

- COVID-19 and impact on our pre-implementation activities
- Focus groups
  - We were unable to obtain representation from our Mid-Hudson region before the start of COVID-19 pandemic
- Postponed our OpenNotes implementation from August 2020 to September 12, 2020 based on feedback from clinical leadership

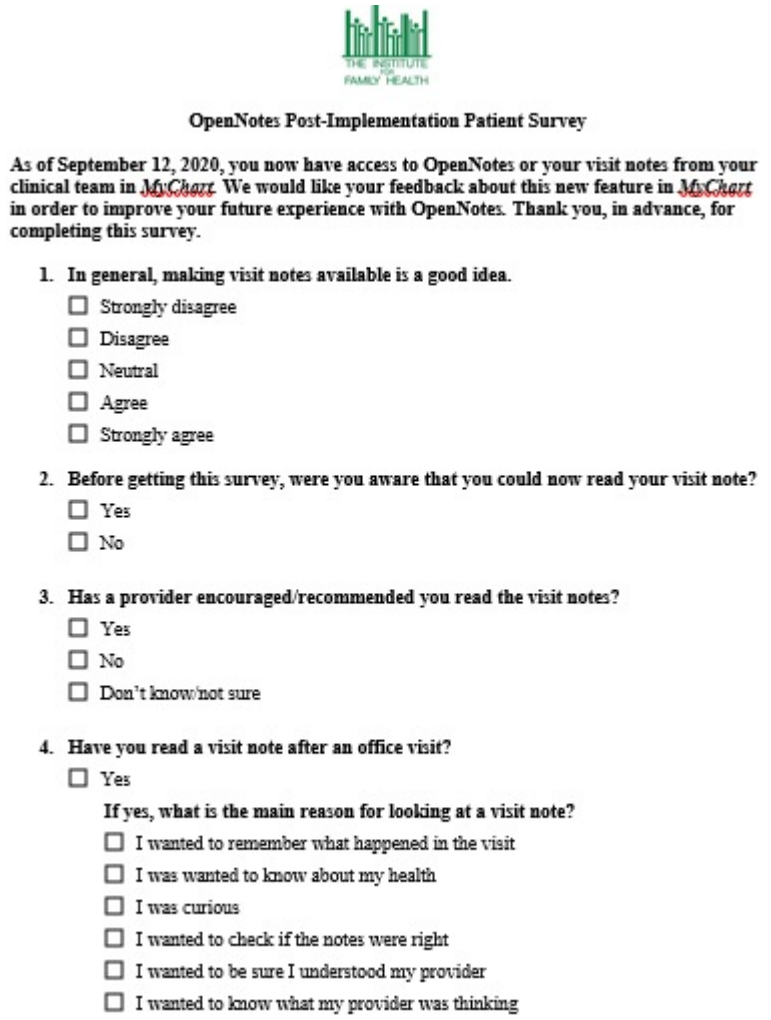
Other Advantages

- Thoroughly reviewed some of our note-writing templates and other EHR features (i.e. best practice alerts) to ensure they are patient-friendly (i.e. easy to understand, appropriate terminology is used)
- Leveraging the pandemic and the implementation of OpenNotes to boost our patient portal (*MyChart MyHealth)* enrollment



Next Steps

- Conduct feedback surveys (support staff, providers, and patients) – May 2021
- Implement the translation services workflow – June 2021
- Analyze OpenNotes data on a routine basis and share with appropriate leadership for QI
  - Identify the most common reasons for not sharing visit notes
- Possibly develop a white paper and/or case study about our experiences with OpenNotes and disseminate it to various audiences



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OpenNotes Post-Implementation Patient Survey

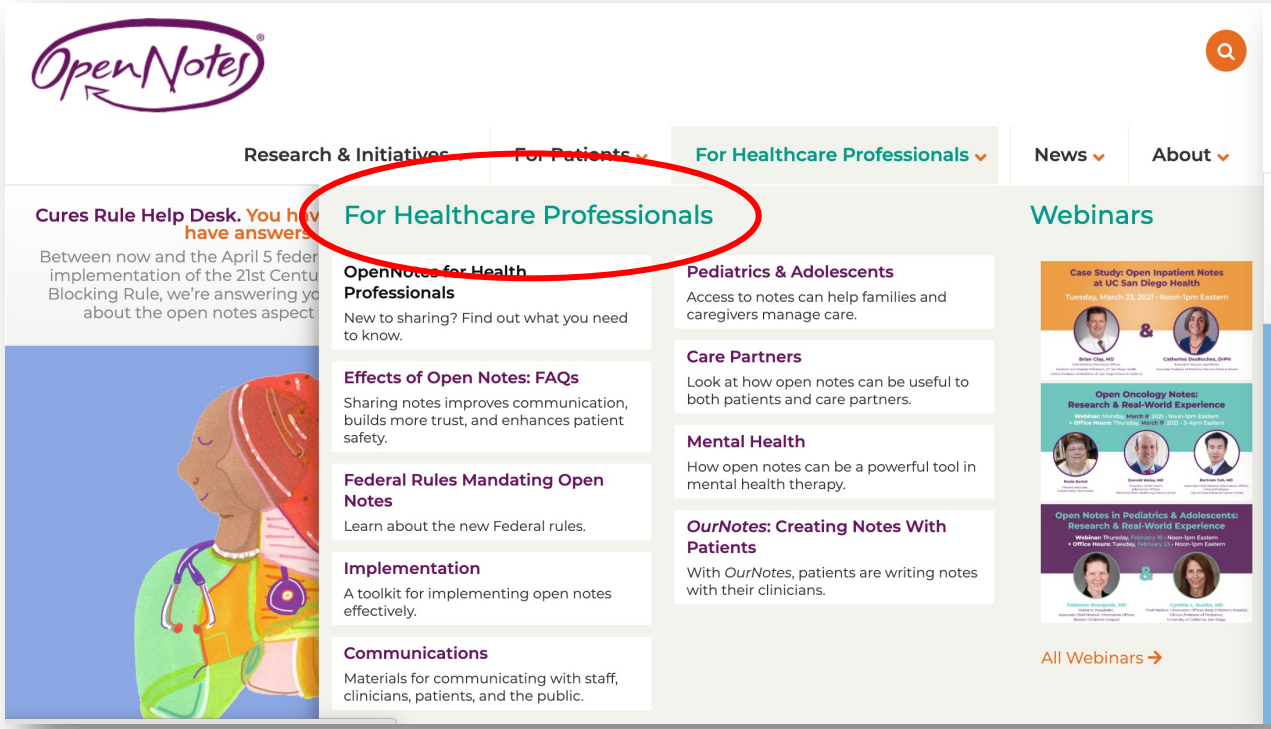
As of September 12, 2020, you now have access to OpenNotes or your visit notes from your clinical team in MyChart. We would like your feedback about this new feature in MyChart in order to improve your future experience with OpenNotes. Thank you, in advance, for completing this survey.

1. **In general, making visit notes available is a good idea.**
   - ☐ Strongly disagree
   - ☐ Disagree
   - ☐ Neutral
   - ☐ Agree
   - ☐ Strongly agree
2. **Before getting this survey, were you aware that you could now read your visit note?**
   - ☐ Yes
   - ☐ No
3. **Has a provider encouraged/recommended you read the visit notes?**
   - ☐ Yes
   - ☐ No
   - ☐ Don't know/not sure
4. **Have you read a visit note after an office visit?**
   - ☐ Yes

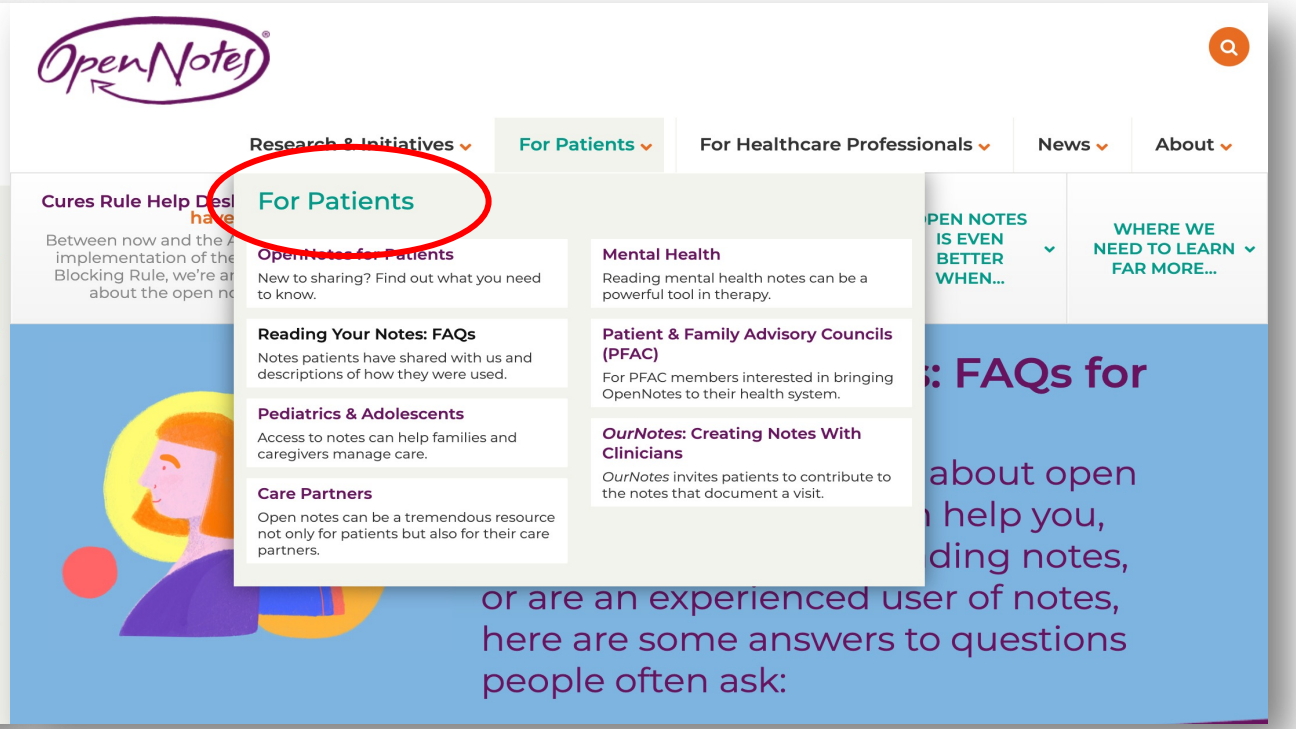
   If yes, what is the main reason for looking at a visit note?
   - ☐ I wanted to remember what happened in the visit
   - ☐ I was wanted to know about my health
   - ☐ I was curious
   - ☐ I wanted to check if the notes were right
   - ☐ I wanted to be sure I understood my provider
   - ☐ I wanted to know what my provider was thinking

Information & Tools: opennotes.org

For clinicians…



For patients…



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Thank you!

Q&A: Open Discussion

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