The OpenNotes Patient Feedback Tool: What Patients Say about Reading Notes

M. Gerard, MD, J. Walker, RN, MBA, P. Folcarelli, RN, PhD, S.K. Bell, MD

Beth Israel Deaconess Medical Center, Harvard Medical School, Boston MA

Beth Israel Deaconess Medical Center

HARVARD MEDICAL SCHOOL TEACHING HOSPITAL

OpenNotes

Research Objectives

➢ **OpenNotes** is a national initiative that invites patients to read their clinicians' visit notes online
➢ Starting with 20,000 patients, about **8 million** patients have online access to notes today
➢ **Patients are increasingly seeking their health data**, but there are few mechanisms for them to provide feedback on documentation errors
➢ **We developed a patient feedback tool** to learn more about patient experiences with reading their visit notes
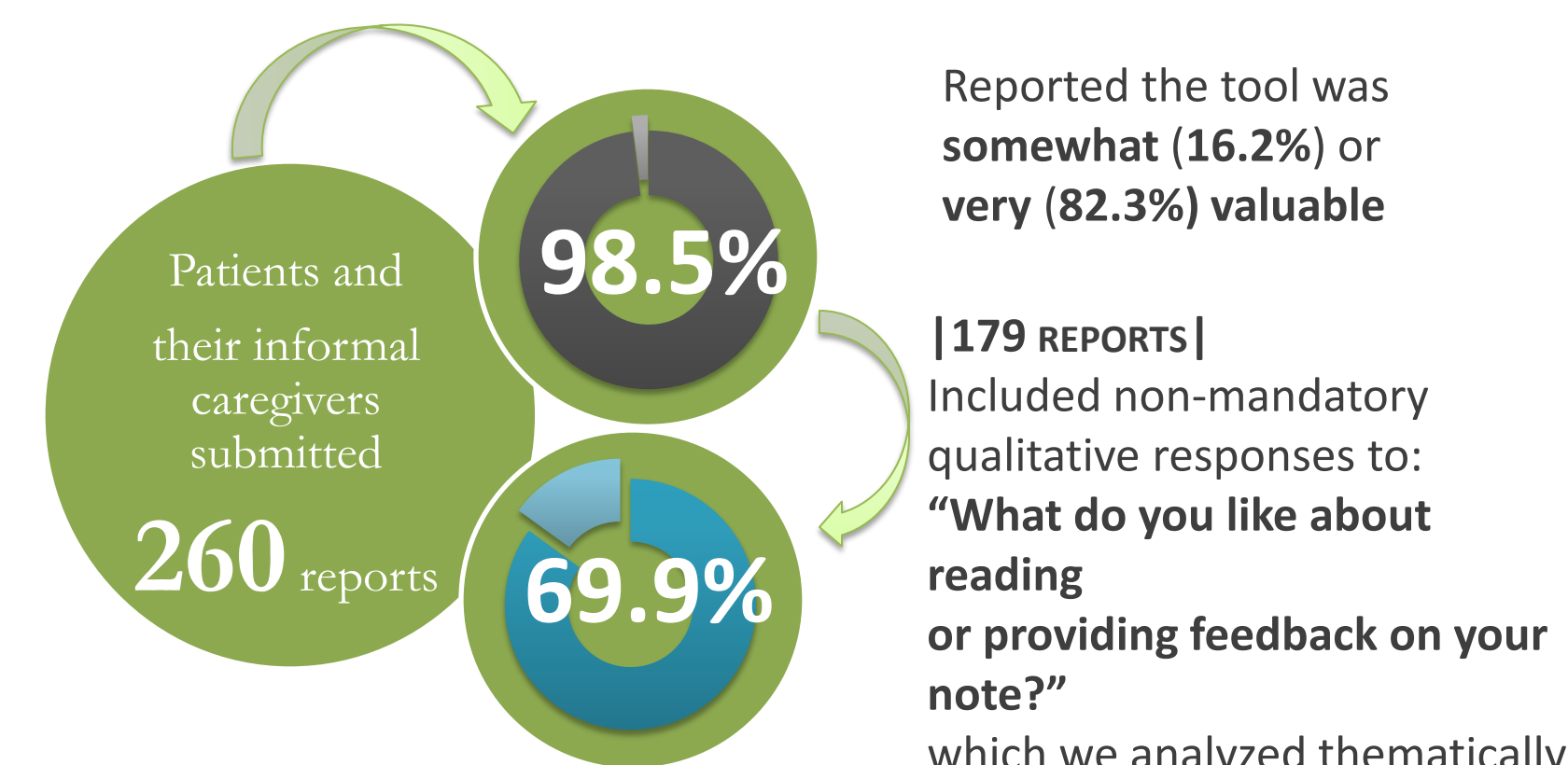
Study Design

➢ All (6225) patients with portal access seen by 41 participating providers in our hospital-based primary care clinic during Aug 2014-15
➢ A "MyFeedback" link at the end of the note led to a 9-item survey
➢ Two team members coded the qualitative responses (kappa 0.74) to **"What do you like about reading or providing feedback on your note?"**
➢ We compared feedback tool reporting rates to our ambulatory online adverse event reporting system

OPENNOTES PATIENT FEEDBACK TOOL

1. Please tell us about yourself:
    ○ I am the patient   ○ I am the informal caregiver of a patient

2. How well did you understand the note?
    Not at all   1 2 3 4 5   Completely

2a. How well did the note describe what happened at your visit?
    Not at all   1 2 3 4 5   Complete and accurate

3. Did you understand what your provider wants you to do next (your care plan)?
    ○ Yes   ○ No

4. If you have had a positive experience with your provider or with open notes, please share your thoughts here:

5. Did you notice anything you thought may be an inaccuracy in your note (not counting misspellings and typographical errors)?
    ○ Yes   ○ No   ○ I am not sure

5a. What kind of possible inaccuracy did you find?

6. Some patients find they learn more about their health, how their health care provider is thinking about their health, or the health care system in general by reading their notes. What did you learn as a result of reading your note?

7. How valuable was the opportunity to read and provide feedback on your note?
    ○ Very valuable- I would do it again
    ○ Somewhat valuable
    ○ Not at all valuable- I would not do this again

7a. What do you like about reading or providing feedback on your note?

8. How can we make your open notes most helpful to you? Please share any ideas you may have about how open notes can help you work together with your health care provider to improve your care even more in the future.

9. Would you be willing to be contacted by our team so we can learn more about how to best include patients in improving care?
    ○ Yes   ○ No

Principal Findings

Patients and their informal caregivers submitted **260** reports

98.5%

69.9%

Reported the tool was **somewhat (16.2%)** or **very (82.3%)** valuable

|179 REPORTS|
Included non-mandatory qualitative responses to: **"What do you like about reading or providing feedback on your note?"** which we analyzed thematically

OPENNOTES FEEDBACK TOOL VS. AMBULATORY ADVERSE EVENT REPORTING

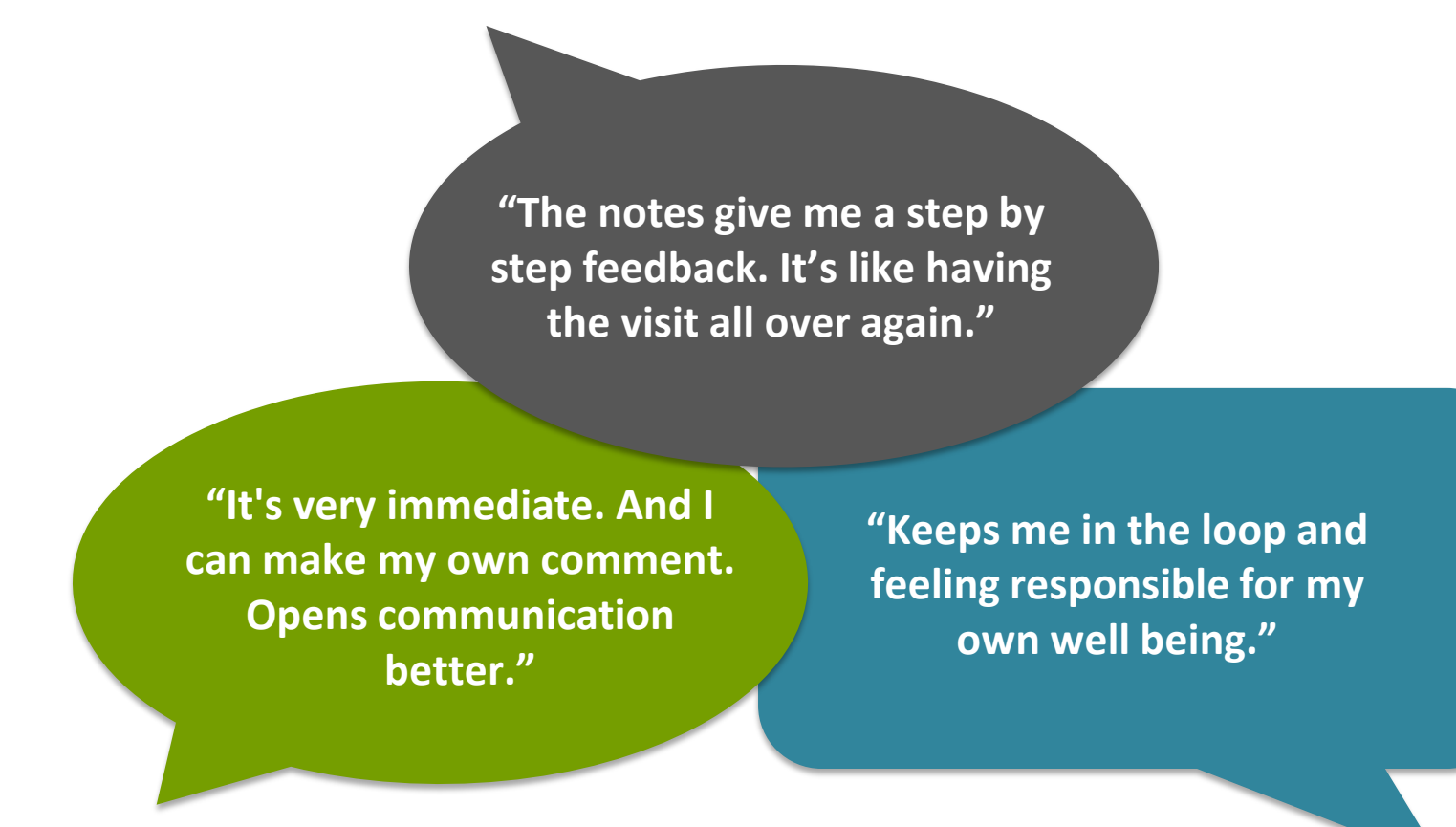|	OpenNotes Patient Feedback Tool N= 6225 patients	Clinician Ambulatory Adverse Event Reporting System* N=41,000 patients
Total reports	260	123
Reports/ patient Reports/ read note	4.2% 9.5%	0.3% NA
Potential safety concerns/visit**	0.6%	0.12%

*Reports in same primary care clinic in same year (FY15)
**10,039 PatientSite user visits with participating providers during feedback tool pilot; 96,934 annual visits in FY15

THEMES: WHAT PATIENTS AND FAMILIES ARE SAYING ABOUT READING NOTES

I. CONFIRM AND REMEMBER NEXT STEPS
"I sometimes have white coat syndrome where I am a little nervous in the doctor's office and then cannot remember all that was said. Reading the notes after my visits confirms what I have heard."

II. QUICKER ACCESS/RESULTS
"I like knowing what the results of my tests mean. The records [laboratory results] show the numbers but the notes provide the interpretation in regards to my personal health status."

III. PARTNERSHIP AND ENGAGEMENT
"I like ...the ability to see the doctor's thought process. The more open communication there is, the better care I, as an active participant, have access to."

IV. ACCURACY AND MISTAKES
"Seeing my notes allows me to see how well I am communicating my issues, which leads to how well my doctors are hearing and documenting my issues. It also allows me to catch errors."

V. SHARING INFORMATION WITH CAREGIVERS
"We are grateful...to be able to review the visit and procedures (if any) performed. Especially helpful for older patients who may have hearing and/or some cognitive/memory loss."

VI. POSITIVE EMOTIONS
"I like reading my notes because they keep me uplifted."

VII. ENHANCED COMMUNICATION AND EDUCATION
"I like the educational and improvement potential of the process. I learn. My provider learns. All good."

VIII. IMPORTANCE OF FEEDBACK
"Having the opportunity to provide feedback is important to moving the program forward and helps stimulate innovation."

Conclusions and Policy Relevance

➢ Nearly all patients and their informal caregivers found the feedback tool valuable, enabling P/F engagement in ambulatory care
➢ What patients/caregivers liked about reading open notes and the feedback tool has **safety implications:**
  • **Better remembering next steps**
  • **Timely result notification**
  • **Patient activation**
  • **Identification of documentation errors**
➢ An OpenNotes feedback tool can:
  • **Engage patients and families**
  • **Enhance communication and safety partnerships between patients and providers**
  • **Inform organizations of improvement opportunities**
  • **Increase ambulatory reporting**

Now and Looking Ahead...

➢ OpenNotes and the feedback tool as a "visit extender"
➢ Implications for patient accountability
➢ Mechanism for bidirectional communication

"The notes give me a step by step feedback. It's like having the visit all over again."

"It's very immediate. And I can make my own comment. Opens communication better."

"Keeps me in the loop and feeling responsible for my own well being."

Research Funder

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