



## Site Overview #2

Learn how Geisinger Health System implemented OpenNotes

### OpenNotes at Geisinger Health System

Geisinger Health System is an integrated health services organization that serves more than 3 million residents throughout 45 counties in central, south-central, and northeast Pennsylvania, and also in southern New Jersey at AtlantiCare (not yet launched), a Malcolm Baldrige National Quality Award recipient. In 2017, the Geisinger Commonwealth School of Medicine became the newest member of the Geisinger Family. The physician-led system is comprised of approximately 30,000 employees, including nearly 1,600 employed physicians, 12 hospital campuses, two research centers, and a 551,000-member health plan, all of which leverage an estimated \$10.5 billion positive impact on the Pennsylvania and New Jersey economies.

Widely recognized for its innovative use of the electronic health record (Epic) and the development of innovative care delivery models such as ProvenHealth Navigator®, ProvenCare® and ProvenExperience®, Geisinger also uses Epic for its patient portal.

As one of three initial OpenNotes study sites, Geisinger began sharing visit notes in 2010 with 24 primary care physicians and over 8,000 patients. By November 2016, over 2,100 Geisinger physicians and advanced practitioners were routinely sharing their notes with over 355,000 patients. Geisinger currently limits the program to outpatient visits, and will expand to inpatient stays and emergency room visits in the future.

#### Key Features:

- Geisinger includes only notes signed after the OpenNotes start date.
- Clinicians share notes with over 99% of patients who are active in the online portal (MyGeisinger), but can choose to exclude individual patients where they perceive the risk for that individual may outweigh the benefit.
- To preserve the doctor-patient relationship and respect adolescent and young adult privacy related to specific topics, Geisinger excludes patients between ages 12 and 17.
- Geisinger gives patients' family caregivers access to their notes online via separate "proxy" accounts.

#### Who Is Sharing Notes?

- OpenNotes is regularly utilized in most outpatient departments, but generally excluded in departments with high-risk information, such as Psychiatry.
- All medical residents and fellows participate in OpenNotes.

#### How Are Notes Being Shared?

- Patients and family caregivers access notes via a secure, online patient portal called MyGeisinger.



## How did Geisinger Introduce OpenNotes to Patients and Clinicians?

- Educational presentations on Geisinger's OpenNotes initiatives were made by clinical champions at department meetings.

## Lessons Learned from Implementation:

- IT's ideal to engage departments and physician leaders directly through face-to-face presentations.
- Use an evidence-based approach (positive impact on patients and the negligible burden on providers) to make the case for adopting OpenNotes.
- Reduce provider anxiety by assuring them it is okay to exclude patients at any time. Refrain from suggesting changes to their current documentation practices. Emphasize that most patients value seeing their documentation as it is currently written. If clinicians feel patients cannot handle their unedited notes, advise them to exclude those patients.
- Use early adopters to reassure other providers that OpenNotes represents a negligible burden, including no increase in portal messages from the patients.
- Start preparing the technology early; it takes time for technology staff to make notes readable on smartphones and for physicians to exclude specific patient groups.
- Set a "roll out" schedule to avoid overwhelming technology staff and to ensure the application develops in a stable manner.

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