

# IMPLEMENTING OPENNOTES

## *THE INSTITUTE FOR FAMILY HEALTH EXPERIENCE*

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# OpenNotes Implementation

- OpenNotes Rationale:
  - Increased engagement in care
  - Improve health outcomes
- Share notes across five Institute departments:
  - Primary care
  - Behavioral health
  - Dental care
  - Nursing
  - Social support services
- Received 2-year grant from the NYS Health Foundation
  - 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)



# Engaging Patients and Staff Pre-Implementation

- 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
    - Would use Google translate or other resources for translation
- 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



# IFH MyChart Users

- 48% of Institute patients are active users
- Almost 90% of active users are between 18-65 years of age
- Race/Ethnicity – Whites (33%), Blacks/African Americans (25%), Hispanic/Latino (30%)
- Gender – 64% Females and 35% Males
- 7% of our active MyChart users indicate Spanish as their primary language



# Sharing Adolescent Notes

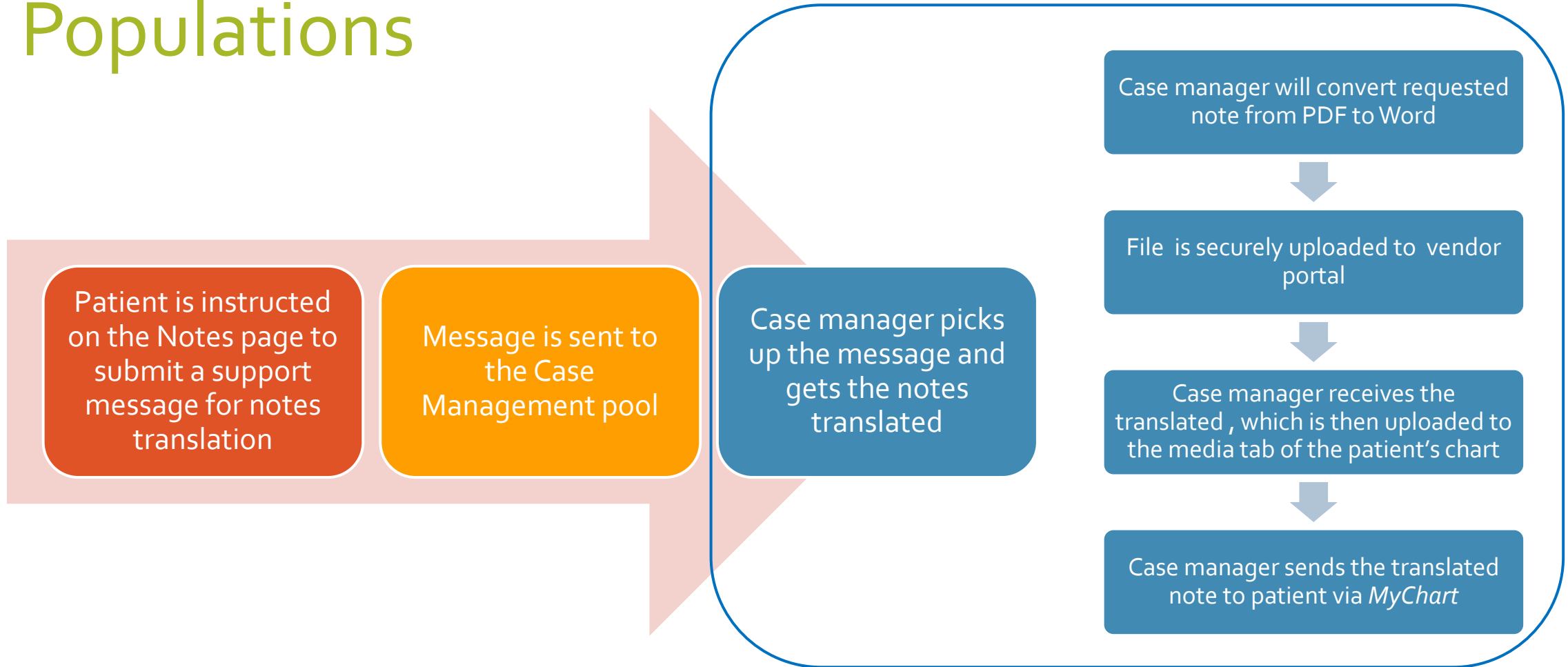
- Based on our MyChart policy
  - Parents get limited access to a child's chart, including medical notes, after age 10
  - Parents/legal guardians are required to apply for proxy access in order to view their child's chart
    - Note: Parents can still get access to a paper copy of full chart (barring confidential information as determined by law) if requested
  - Current number of MyChart users age 10-17: 2,759



# Health Literacy and Impact of COVID-19

- 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
  - Intensive effort to help patients connect online (i.e. helping create email addresses, patient portal logins)

# OpenNotes for Non-English Speaking Populations



# Implementation

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



# Implementation

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

# Quantitative Assessment

- Nearly 100% of our notes are shared (that are deemed to be shareable)
- Of these, 10-13% of the notes are read by patients
- No patients have yet requested notes in another language
- Post-implementation feedback surveys for staff, clinicians and patients



## 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. Completing this survey is optional and your care will not be affected if you do not submit it.

**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

# Post-Implementation Evaluation

- Provider feedback
  - Response rate: 24.4% (N=95)
  - 93% of providers aware of OpenNotes before survey
  - 48% strongly agree/agree that making visit notes available is a good idea
  - 55% of providers have changed how they write their notes
  - 17% strongly agree/agree that patients who read their visit notes are better prepared
  - 49% of providers said patients never brought up something about a note they had written
  - Beneficial: more transparency, encourages clinician accountability
  - Challenges: possible harm (i.e. increases paranoia or anxiousness leading to less openness), more in-depth documentation, increase in messages/phone calls

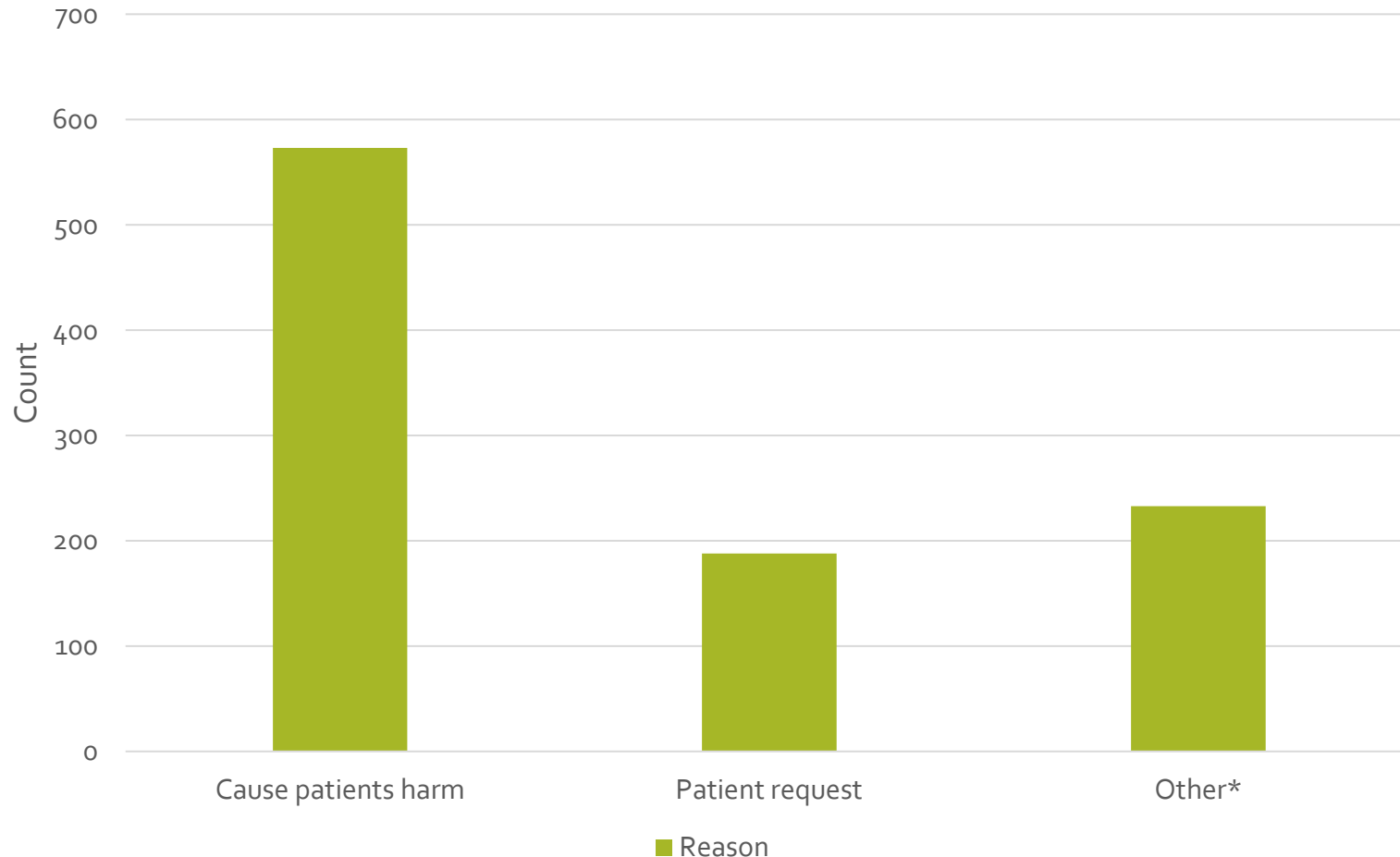


# Post-Implementation Evaluation

- Support staff feedback
  - Response rate: 28% (N=47)
  - 83% of support staff aware of OpenNotes before survey
  - 60% strongly agree/agree that making visit notes available is a good idea
  - 62% said patients never asked about OpenNotes in general
  - 66% said they never received complaints from patients about what was written in their visit notes
  - Types of complaints: misinformation, not understanding information in the chart, not liking what was written or believed there was a misdiagnosis
  - If they were unable to answer any questions, they referred patients to their providers or asked for assistance from a co-worker or manager



# Reasons for not sharing a note



\*Other reasons include:

- Patient does not have MyChart
- Supervision
- Administrative notes

# Patient Feedback

- Total N = 36
  - English-speaking = 20 (56%)
  - Spanish-speaking = 16 (44%)

Measure	Total	English-speaking respondents	Spanish-speaking respondents
Strongly agreed or agreed that making visit notes available is a good idea	31 (86%)	16 (80%)	15 (94%)
Aware that they could view their notes	25 (69%)	15 (75%)	10 (63%)
They read their notes after every or most visits	27 (75%)	14 (70%)	13 (81%)
Strongly agreed or agreed that the notes accurately described their visit	29 (81%)	16 (80%)	13 (81%)

# Patient Feedback

Measure	Total	English-speaking respondents	Spanish-speaking respondents
Visit notes are easy to read and understand	24 (67%)	13 (65%)	11 (69%)
Contacted their provider about a visit note	9 (25%)	4 (20%)	5 (31%)
Strongly agree or agree that they remember and follow care plan better	28 (78%)	14 (70%)	14 (88%)
Strongly agree or agree that they understand their health and medical conditions better	24 (67%)	13 (65%)	11 (69%)
Strongly agree or agree that they feel more in control of their health	25 (69%)	13 (65%)	12 (75%)
Strongly agree or agree that OpenNotes changed the way they feel about their provider	7 (19%)	3 (15%)	4 (25%)

**THANK YOU**

**QUESTIONS?**