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to improve health care and health



# FAQs Related to the Northwest OpenNotes Consortium

**April 2014**

## **Why was the Northwest OpenNotes Consortium organized?**

In February 2013, at We Can Do Better's 5<sup>th</sup> Annual Conference, Dr. John Santa (an Oregon physician and director of the Consumer Reports Health Rating Center) presented information about a movement called OpenNotes. OpenNotes advocates for patients to have full and easy access to the notes written in their medical records by their doctors and other clinicians. Based on feedback from attendees, and with support and direction from its Board, We Can Do Better (WCDB) decided to adopt OpenNotes as a major initiative in support of improving the health of all Oregonians.

In June 2013, WCDB brought together Oregon's health systems, consumer groups, and policy makers to meet with Dr. Santa and Tom Delbanco and Jan Walker, co-directors of the OpenNotes program.

Attendees were enthusiastic and decided to develop a consortium focusing on offering open notes to their patients. WCDB asked recently retired Kaiser Permanente Associate Medical Director for Medical Informatics, Dr. Homer Chin, to join them as the champion and chairperson for this effort. By September 2013, the group reconvened to form the Northwest OpenNotes Consortium. WCDB subsequently secured funding for these activities from Cambia Health Foundation and from the Robert Wood Johnson Foundation. WCDB will bring this topic full circle at their 6th Annual Conference on April 24, 2014, with a lunch panel of local providers who have now opened their notes to patients.

## **Why create a consortium to do this work?**

The organizations were clear: They wanted to collaborate together to offer their patients open notes through their own patient portals. This level of cooperation is unusual, given that these organizations may compete for many of the same patients, especially in the Portland Metro area. By coming together, they are focusing on a common goal: What is best for patients in the collective community of Oregon and Southwest Washington? As participants began to educate and gain buy-in within their own organizations, they shared their experience and knowledge, supporting their respective organization's ability to move forward. In addition, the Portland VA Medical Center, which had 10 years' experience with open notes even before the national VA Veterans Health Administration opened notes nationally in January 2013, has acted as an important mentor for the group.

Participants in the consortium have made remarkable progress in a relatively short period of time.

### **Who is participating?**

Current members are:

- Kaiser Permanente Northwest
- Legacy Health System
- OCHIN, Inc.
- Oregon Health & Science University
- The Portland Clinic
- Portland VA Medical Center
- Providence Medical Group - Oregon
- Salem Health
- The Vancouver Clinic

### **Are the Consortium members receiving external funding to open notes to their patients?**

No. All the health systems are funding their efforts with internal funding.

### **Are any of the software vendors who produce electronic medical records directly involved in the Consortium?**

No. There are multiple software systems that can be used to implement OpenNotes. Although most of the current consortium participants use electronic medical records from Epic Systems, other healthcare organizations have implemented OpenNotes using other software systems. The Portland VA Medical Center has implemented OpenNotes using their own VA VistA system. We welcome all healthcare organizations to join our consortium irrespective of what electronic health record system they use.

### **How expensive is it to implement OpenNotes?**

Software expenses have, so far, not been a major barrier to implementation.

OpenNotes requires time and effort on the part of the leaders and providers of care in healthcare organizations, especially physicians. They need to learn about, and prepare for, the changes that will take place as patients gain easy access to their records. It is the time and effort needed to make this culture change that is resource intensive.

### **Are there charges to patients to access their notes?**

No one involved in a current OpenNotes project has charged patients or insurers to provide patients easy access to their visit notes. The costs for electronic access are usually quite low especially on a per person basis. There are no additional charges to patients to access their notes online. It is possible that if notes cannot be provided

electronically that there may be copying costs or costs involved in providing a disc or memory stick.

### **What else needs to be done in order to open notes to patients?**

Each organization must decide how it is going to implement OpenNotes, and not all will do it the same way. The important thing is to begin the journey! Some questions Consortium members will be considering:

- Will we require all doctors to open their notes? What about nurses, physician assistants, physical therapists, and other clinicians?
- Should our clinicians have the option to hide some notes? Should they be able to exclude some patients from seeing their notes online?
- Will our system notify a patient each time a new note is made available?
- How should we educate patients about how best to use their notes?
- If patients don't want to see their notes online, what can they do?
- If a patient finds an error in a note, what should he or she do?

### **What is next?**

The Consortium plans to reach out to other local organizations, particularly smaller groups of physicians, to advocate and support adoption of open notes. We will also support Consortium members in research related to fully transparent medical records, such as their impact on patient safety, quality of care, and the utilization of health care services. We plan also to share what we learn with others in the national OpenNotes movement and to engage with, and support, other communities pursuing a similar path.