

Open Notes:

Putting Patients at the Center of Their Care

Bill Sonterre, Stratis Health

Lynn McFarling, MD, CentraCare

Health Care Homes Presentation

July 18, 2018



Objectives

Participants at this learning event will gain knowledge to:

- Explain how open clinical notes foster patient engagement and activate patients to manage their health care
- Describe current open notes implementation in Minnesota
- Identify and address perceived barriers to open notes in your clinic
- Adapt practices used by one health system providing open notes across its clinic



Open Notes: Presenters



Bill Sonterre

Strategic Account Executive/Senior
Health Information Technology
Consultant, Stratis Health



Lynn McFarling, MD

Chief Medical Information Officer,
CentraCare Health, St. Cloud



What are open notes?

- Sharing complete clinical notes electronically, not just after visit summaries (AVS)
 - History and physical
 - Assessment
 - Care plans
- Not software technology
- OpenNotes is a national movement that supports:
 - Fully engaging and activating patients
 - Helping patients understand and manage their health
 - Improving the quality and safety of care
- Allows patients better control of their health care information
 - Verify accuracy of medical records
 - Edit and add - own your notes

What are open notes?

- Helps patients remember what clinicians said
 - Allows patients to look up unknown terms, medical information
 - Patient can review in between visits/ongoing reminders
- Share information with personal support team/caregivers/family members
- Typically ambulatory setting, moving to inpatient, other settings
- Research shows improved adherence, safety, and satisfaction (Beth Israel Deaconess Medical Center, Boston)
- Grants in 2016 from Peterson, RWJF, Moore and Cambia Foundations to spread open notes
- Early adopters include VA, Kaiser, Geisinger, Mayo, Stanford, UCLA, BIDMC

Why open notes?

- Physicians communicate 80% of relevant information; patients remember 50% of that information
- Engage and activate patients
- Help patients understand and manage their health
- Improve overall quality and safety of care

Patient benefits from using open notes

- Remember what clinicians said
- Look up unknown terms, medical information
- Verify accuracy of information
- Control health care information
 - Review between visits
 - Edit and add to own your notes
 - Share with personal support team

From patients.....

- “Sometimes I forget what is said to me because it is emotional and it is so nice to be able to go back and read exactly what my doctor was telling me.”
- “I feel less ‘information overload’ when I can review the clinical notes.”
- “I like to see my clinical notes. Sometimes it clarifies issues I may be confused about...My lab results are important to keep me aware of my condition and any progression. I'm more involved in my own care.”
- “Helps me track my progress and keep abreast of changes in my disease process, as well as prepare for my upcoming appointments.”
- “Allows me to share my medical records (or those of my children or aging parents) with family and physicians outside of Mayo Clinic.”

Stratis Health open notes 2018 Minnesota survey

- Gather current information regarding MN use of open notes
- Support spread of open notes in MN
- Conducted Jan 2018
- 18 organizations surveyed; 16 responded

Minnesota health systems that have implemented open notes

Organization	Number of Clinicians - Minnesota	Year Implemented
Mankato Clinic	131	2011
Mayo	5,357	2012
Avera	147	2014
Altru	141	2015
Essentia	1,342	2015
Sanford	815	2015
Allina	2,632	2017
CentraCare	877	2017
Madison Health	14	2017

Survey findings - open notes implementers

- High percentage of clinicians sharing notes – over 90%
- Notes not shared – primarily mental health notes
- Patient contributed data - demographic changes, questionnaires, blood pressure, glucose, insurance, problem lists, medication lists, medical histories, messages, documents, photos, weights
- Collecting patient feedback on using open notes
- Promoting/providing assistance using open notes – 50%
- Need better metrics – how many are viewing; how are using notes

Implementation challenges

- Clinician concern: getting more questions/messages from patients
 - Did not happen after went live; a non-event
- Clinician concern: patients would not be able to understand their notes
 - Clinicians encouraged to use as opportunity to educate patients/families
- Provider education helped and was important in the process
- A few technical issues, but they got resolved

Implemented organizations - more work to be done

- Still low percentage (<10%) viewing notes; need to increase
- Keep amping up promotion and support for using available notes
- Improve monitoring/metrics to track viewing activity
- Monitor which notes not shared by providers
- Expand/open/share additional type notes - mental health, child/adolescent
- Expand to inpatient care – share notes real-time while patient in hospital
- Expand to other settings – such as long term care facilities

Non-implementers – barriers highlighted from survey results

- Needs to be an organizational priority; competing priorities
- Physician resistance; concerns about increased number of patient calls/questions about the information
- Lack of knowledge about the program
- Technical resources to set up the system
- Need patient portal to share information electronically

Non-implementers – what is being shared currently via patient portals

- Labs, test results, after visit summaries. Not sharing mental health or adolescent information
- Other information/uses – schedule visits, provider questions and communications, health reminders, surveys
- Patient contributed data – 5 responders allow; post hospital follow-ups, pre-visit questionnaires, flowsheets to collect blood sugars, patient surveys

Conclusion

- Organizations have much of the technology infrastructure in place for moving to full open notes sharing, less of a technology issue
- More about need for organizational priority



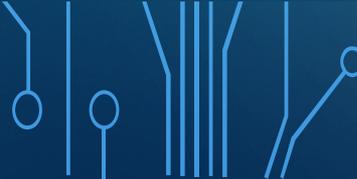
Stratis Health is a nonprofit organization that leads collaboration and innovation in health care quality and safety, and serves as a trusted expert in facilitating improvement for people and communities.

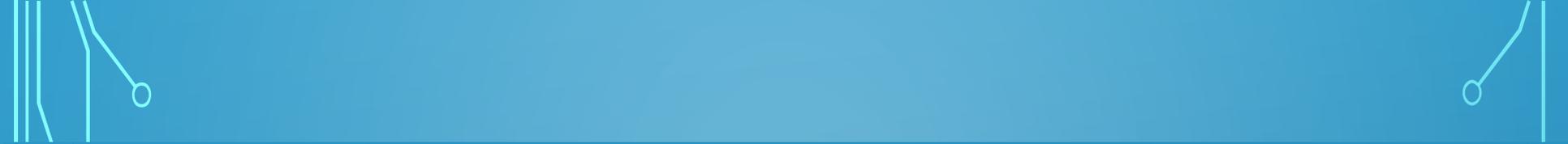




CENTRACARE OPEN NOTES

LYNN MCFARLING MD, CMIO





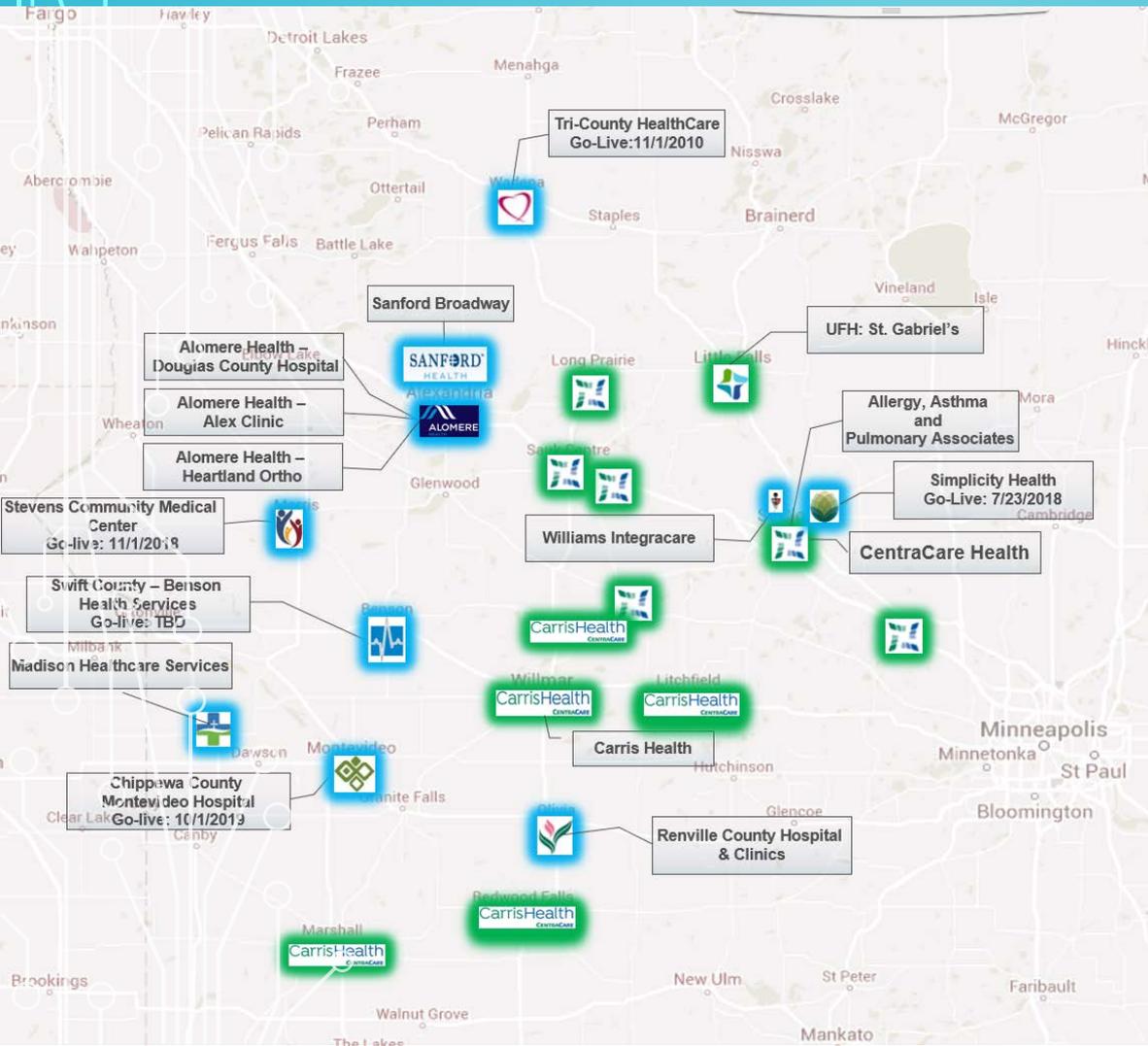
CURRENT CENTRACARE HEALTH & CARRIS HEALTH SITES

1. **St. Cloud Hospital**
 2. CentraCare Health – Long Prairie
 3. CentraCare Health – Melrose
 4. CentraCare Health – Sauk Centre
 5. CentraCare Health – Monticello
 6. CentraCare Health – Paynesville
 7. CentraCare Clinics
 8. Carris Health - Rice Memorial Hospital – Willmar
 9. Carris Health Surgery Center – Willmar
 10. Carris Health Surgery Center – Marshall
 11. Carris Clinics – May 1st, 2019 Epic Go-Live
- 



COMMUNITY CONNECT SITES ON CENTRACARE'S EPIC SYSTEM

1. Sanford Health Broadway Clinic - Alexandria
 2. Allergy, Asthma and Pulmonary Associates – St. Cloud
 3. Williams Integracare – Sartell
 4. Tri-County Health Care – Wadena
 5. Alomere Health - Douglas County Hospital – Alexandria
 6. Alomere Health – Alexandria Clinic – Alexandria
 7. Alomere Health – Heartland Orthopedic – Alexandria
 8. Renville County Hospital & Clinics – Olivia
 9. St. Gabriel's Hospital & Family Medical Center – Little Falls
 10. Little Falls Orthopedics – Little Falls
 11. Madison Healthcare Services – Madison
 12. Monticello Surgery Center – Monticello
- 

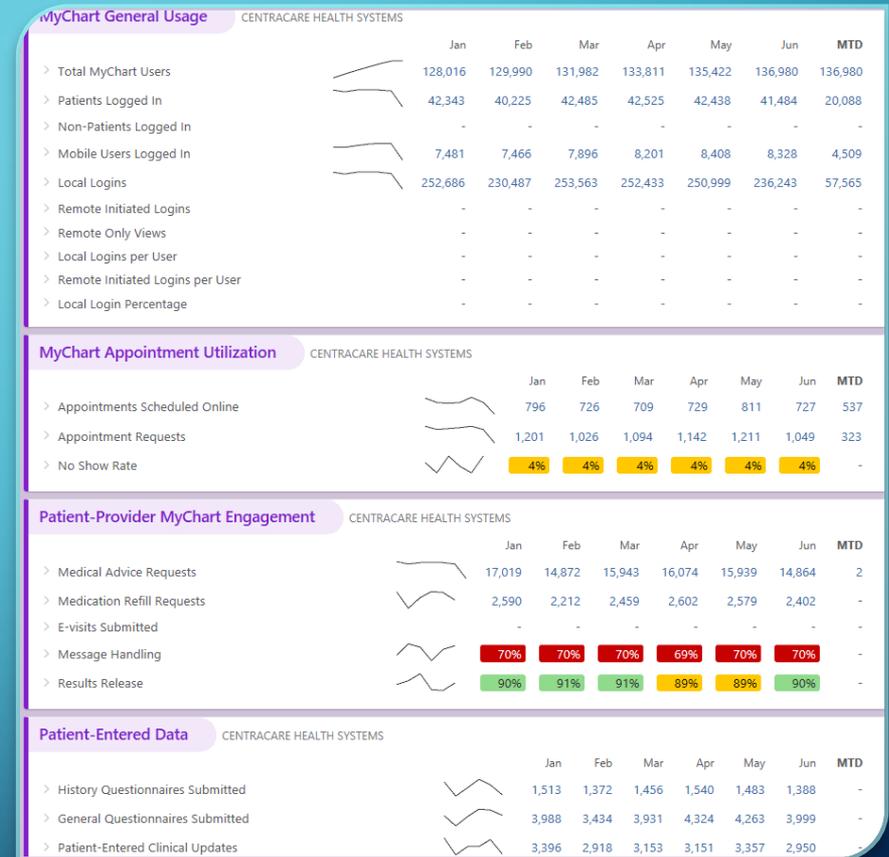


CENTRACARE AND OUR EPIC COMMUNITY CONNECT LOCATIONS

- CentraCare = Green
- Community Connect = Blue

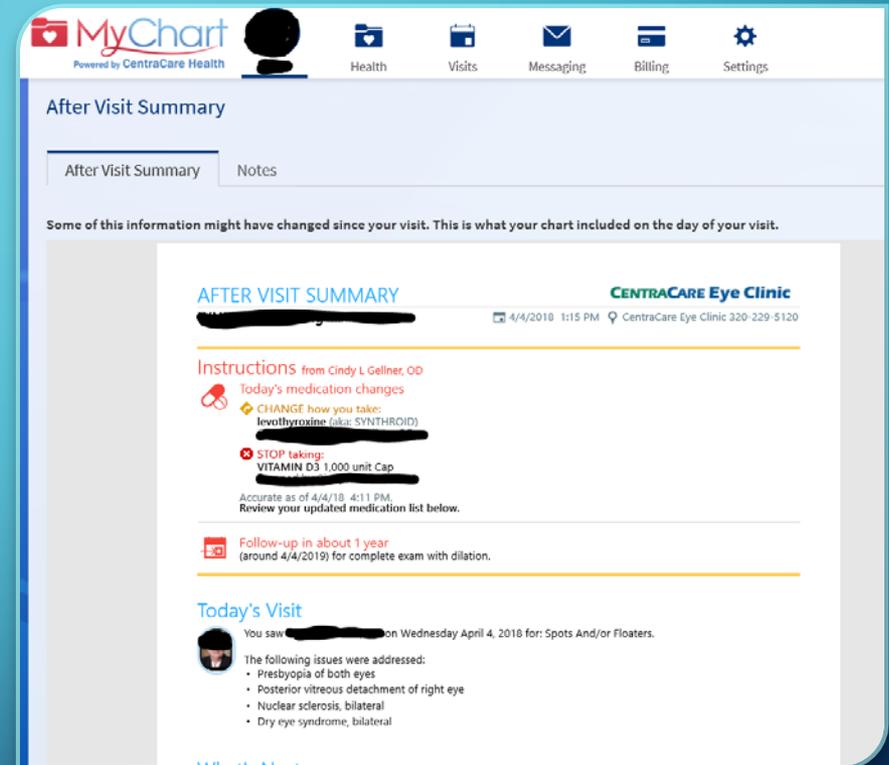
MY CHART PATIENT PORTAL AT CENTRACARE

- Percentage of patients signed up for patient portal varies from 30% to 70%
- Older patients do use patient portals and do review notes and test results
- Percentage of patients that read notes ~ 13%
- High volume of patients messaging clinics for advice



HOW DO PATIENTS FIND THEIR NOTES

- Finding notes is not intuitive
- Ask EMR vendors to make access to notes easier to find
- Improve education to patients that the notes are available



WHAT CAN THE PATIENTS SEE ?

- Lab test results all auto release
- Very few sensitive tests that don't release (HIV, genetic tests, tumor markers)
- Plain x-rays, MRI, CT, nuclear medicine, pathology, cytology and microbiology
- Provider notes including clinic progress notes, H&P, consult notes, procedure notes, telehealth notes, discharge summary and therapy notes
- Not seen: chemical dependency and most behavioral health notes

BENEFITS OF OPEN NOTES

- Studies show that patients correct mistakes in documentation which improves accuracy and safety
- Remind patients why medications are prescribed and improves adherence to medications
- Remind patients of next steps in chronic disease management; upcoming tests, referrals, immunizations and other preventative services
- Builds trust between providers and patients with transparency of information. Patients feel the provider really listened to them when they see their description of symptoms documented in the note
- Stronger relationships between provider and patient lead to improved patient engagement
- Shared decision making is enhanced
- Caregivers benefit too by reviewing notes to better assist in managing care for patients



HEALTH CARE HOME CAN HELP

- Encourage patients and caregivers to sign up for patient portals
- Encourage patients to read their notes
- Explain the benefit of the note to the patient and caregivers
- Encourage patients to send corrections about documentation to the clinical team

Contacts & Resources

Bill Sonterre, Stratis Health

bsonterre@stratishealth.org

www.stratishealth.org

Lynn McFarling, MD, CentraCare

mcfarlingl@centracare.com

<https://www.centracare.com/>

Open Clinical Notes: A Tool for Patient Engagement – MDH LMS

www.health.state.mn.us/healthreform/homes/collaborative/lms

