Kaiser Permanente Northwest Region’s
Road to Sharing Notes

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Open Notes Supports Kaiser Permanente’s Consumer Digital Strategy

Managing My Condition
Accessing Care Anytime Anywhere
Managing My Coverage and Service Integration
Personalization
Security
Social

Joining KP
Staying Healthy
Location Based Services
Mobile
Data Visualization
Data Analytics
It Started with the Member

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Compelling Data

Growing Member Demand

Socializing the Concept

A Bold Move

Open Notes Launch April 2014

July 2013

KPNW present concept to Northwest physician leaders, chiefs and board

Sept. 2013

Recommended full-scale launch

Advisors invited to participate at Board meeting

Nov. 2013

Primary Care Leadership Meeting: Presentations by Dr. Delbanco, Consumer Reports, the VA and members

Dec. 2013

NW Permanente Senior Operations Team decides Open Notes is not just a primary care initiative; the whole region is ‘all in’

Westside Patient Advisory Council Advisors ask for Open Notes as priority

Support grew with presentation to each audience
We Can Do Better

All major Portland, Ore., and Vancouver, Wash., health care organizations involved

Supported by:

Robert Wood Johnson Foundation

Consumer Reports
KPNW Chooses Big Bang Implementation

Includes notes for all office visits and telephone visits after launch

Ability to hide notes

Viewable by those with proxy access

Exclusions:
- Teens (13-17)
- Mental Health, Addiction Medicine, and Occupational Medicine
- Pain Clinic launched September 2015
Patients Invited to Read Notes

Patients notified via secure email tickler sent to e-mail at the time the clinician closes the encounter.
SUPPORTING PROVIDERS TO SHARE NOTES
Workflow Impact Was Minimal

• Providers were given ample notice/communication and support materials
• Worries about fears did not materialize
• Providers maintain control over their notes via the ability to hide notes
Communicate! Communicate! Communicate! (Nobody was surprised by Open Notes)

**Internal: Physicians**
- Chiefs, physicians, executives via email and department presentations

**Internal: Health Plan**
- Manager presentations, emails, huddles, call center FAQs, talking points, Intranet newsletter

**External**
- Press releases, brokers, direct mail, social media, AVS SmartText
Given to Clinicians: Tips for Sharing Progress Notes

**Do**
- Explain to patients what they may expect to see in notes
- Expect patients to read, download and share your notes-write accordingly
- Use situational wording to focus discussion on the problem at hand
- Incorporate lab or study results
- Include educational materials
- Soften certain language:
  - Obesity = BMI too high
  - Heart failure = heart not pumping correctly
  - Poor historian = patient could not recall
  - Patient denies = patient did not report

**Don’t**
- Oversimplify notes
- Omit sensitive issues such as obesity, substance abuse, mental health, suspicions of life-threatening illness, etc.
- Use pejoratives e.g., fat, angry, resistant
- Include jargon or abbreviations such as SOB (easily misinterpreted) or BID (not easily understood)
Provider Fears Did Not Materialize

What we heard from providers:

• Despite trepidation, it was no big deal
• Members already had access to notes — this just makes it easier
• No change to how notes were written or how care was provided
• Minimal contact from patients about their notes

What Did Providers Think Pre- and Post- Launch?

Source: Inviting Patients to Read Their Doctors' Notes: A Quasi-experimental Study and a Look Ahead*, Annals of Internal Medicine, Delbanco, et. al, 2012

KP Provider Voices

“Honestly, I couldn’t believe how few problems we had when we started Open Notes.”

“There's a lot going on in an exam room. Hard for patients to stay focused. Anything we can do to reinforce the message is important. That should be the reason for doing this.”
Hiding Notes is a Rare Event

For example, out of 100 providers ...

10 hide 90% of all hidden notes
1 hides 40% of all hidden notes

Providers maintain control over their notes; very few (<.5%) of notes are hidden

Note: Provider can hide notes regardless of kp.org registration i.e., some notes are hidden for patients that could never view their note.
Eligible Provider types include: Physician, Physician Assistant, Nurse Practitioner, Podiatrist, Certified Nurse Midwife, Chiropractor
MEMBER USAGE AND EXPERIENCE
Members Are Viewing Notes, Email Traffic Remained Stable

Visits to part of kp.org that holds Open Note increased 3 times

Source: Webtrends Data; WPP-Consumer Rollup-Northwest; Content Appealing, Pages; Aug 2013-Dec 31, 2015
Members Surveyed for Their Experiences

The purpose of the survey was to understand:
- Are notes confusing for members? Do they find them to be accurate?
- Do members find value from reading notes?
- Are notes important to decisions related to future health plans?

NW: Surveyed 1,500 members, 20% response rate
SCAL: Surveyed 700 members, 19% response rate

Surveys were conducted six months post launch with members who had a visit in an eligible department in the prior week
Members Report Notes are Accurate & Easy to Understand

“My notes are accurate”

“I can understand my notes”

% Somewhat/Strongly Agree

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Reading Notes Engages Members in Care

“I understand my health conditions better.”

“I know what to do to take better care of myself.”

“I feel more in control of my own health care.”

“I think my relationship with my doctor will improve.”

“My overall opinion of my doctor has improved.”

“I am more likely to take my medication as prescribed.”
Notes Are Important in Future Health Plan Decisions

Even for members who did not log on to view notes, notes are an important distinguishing feature in future health plan decisions.
CLOSING & DISCUSSION
Voice of the Member

• “Now, after reading the chart notes, I feel like my doctor cares about me!!!!”

• “For me, the chart notes are like Paul Harvey states 'THE REST OF THE STORY' "

• “I told my doctor I ran every day and now I think he knows I REALLY DON'T. This may hold me more accountable to myself and my doctor.”

• “I wanted my doctor to treat my mind, body, and spirit. I am convinced that is happening based on reading the notes.”

• “The total picture of my health will help me heal.”
In Conclusion

Implementation was easy; it has been a non-event for providers

“Honestly, I couldn’t believe how few problems we had when we started OpenNotes.”

“For us, in general, I think it’s been a non-event.”

“Don't worry about it. Sharing notes is a step in the right direction.”

Members report great value in reading notes

“Makes me feel like I’m more a part of the care...now I've been brought in right away. I’m more connected with what's going on.”

“Having these notes...means everything to me.”

“I have a serious medical condition. Reading my notes, gave me a better understanding of how I was going to get through this.”

Providers continued to provide care “business as usual”

“Don’t change way you write the language; it should always be clear in medical terminology.”

“I was nervous ... but not a single patient contacted me about a note, and I do a lot of clinic work.”

“It's been business as usual, people continue to do their work. It was one of the most seamless implementations I think we've done in a long time.”
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