



## AGENDA

### FACULTY

**Catherine DesRoches, DrPH**, Executive Director, OpenNotes, Boston, MA  
**Beverley H. Johnson**, President/CEO, Institute for Patient- and Family-Centered Care, Bethesda, MD

**Jonathan Bullock**, Principal Consultant, Kaiser Permanente's National Service Quality, Oakland, CA

**Amy Cohen, PhD, BCBA, PMP**, PFCC Program Manager, Jeffords Institute for Quality, University of Vermont Medical Center, Burlington VT

**Kerry Litman, MD, CPPS**, Family Physician, Physician Lead for PFCC, Quality Director, Kaiser Permanente, San Bernardino County Medical Center, San Bernardino, CA

**Stephen F. O'Neill, BCD, JD**, Behavioral Health Specialist, OpenNotes, Boston, MA

**Podge Reed**, Patient and Family Advisor, Johns Hopkins Hospital, Baltimore, MD

**Liz Salmi**, Senior Multimedia Communications Manager, OpenNotes, Sacramento, CA

**John Santa, MD, MPH**, Director of Dissemination, OpenNotes Portland, OR

**Deborah Wachenheim, MPP**, Manager of Stakeholder Engagement, OpenNotes, Boston, MA

**James Wallace, MD**, Chief of Radiation Oncology, Leader of Cancer Service Line, University of Vermont Medical Center, Burlington VT

### OBJECTIVES

- Develop a shared understanding of the core concepts and strategies of patient- and family-centered care and OpenNotes and how they can enhance quality, safety, the experience of care, and the work experience for clinicians and staff.
- Describe practical strategies for partnering with patients and families in:
  - Information access/transparency.
  - Care planning, decision-making, medication management, self-management support, and care coordination.
- Describe the innovation of OpenNotes: the research, and its use in ambulatory care settings, including mental health.

- Discuss OpenNotes implementation and the lessons learned.
- Describe future implications of OpenNotes: OurNotes, Safety/Diagnostic Error Correction and Prevention, Interoperability.
- Describe practical strategies for involving patient and family advisors and consumer organizations in advancing the practice of patient- and family-centered care, and the use of OpenNotes in ambulatory settings.

<b>7:30 am</b>	Registration, Networking, and Continental Breakfast
<b>8:00 am</b>	<b>Welcome and Introductions</b> <i>(Cait DesRoches)</i> <i>(Bev Johnson)</i>
<b>8:20 am</b>	<b>OpenNotes: A Patient Perspective</b> <i>(Liz Salmi)</i>
<b>8:35 am</b>	<b>University of Vermont Health Network: Ambulatory Care Implementation Strategies for PFCC and Open Notes</b> <i>(Jim Wallace and Amy Cohen)</i>
<b>9:05 am</b>	<b>OpenNotes Research: Patient Outcomes</b> <i>(Liz Salmi)</i>
<b>9:20 am</b>	<b>Patient and Family Advisors and OpenNotes: A Personal Story and a Health System Story</b> <i>(Jonathan Bullock and Podge Reed)</i>
<b>9:45 am</b>	Group dialogue/Q&A
<b>10:00 am</b>	<b>BREAK</b>
<b>10:15 am</b>	<b>OpenNotes and Culture Change: A Clinician Perspective</b> <i>(Kerry Litman)</i>
<b>10:45 am</b>	<b>Sharing Mental Health Notes</b> <i>(Steve O'Neill)</i>
<b>11:20 am</b>	Brief reports from implementers
<b>11:50 am</b>	Group dialogue/Q&A
<b>12:15 pm</b>	<b>IPFCC and OpenNotes Resources</b> <i>(Deb Wachenheim and Bev Johnson)</i>

**12:30-1:30 pm**

**LUNCH**

Facilitated table discussions of concerns, questions, and hot topics. Bring to breakouts.

**1:30-3:30 pm**

**TRACK #1 Building the Commitment to PFCC and the Transparency of Open Notes within Health Systems**

Facilitated by a faculty team (*Deb Wachenheim, Bev Johnson, Amy Cohen, Jim Wallace, Jonathan Bullock, Steve O'Neill, Kerry Litman, and Podge Reed*)

**Luncheon Tabletop Issues for Discussion**

**PFCC Related Issues**—The Care Act/Care Partners, Welcome Policies and Practices, Self-Management Support and Patient Activation, Advanced Care Planning

**Roles of PFACs**—In Planning, Implementation, and Evaluation of OpenNotes and Designing the Communication to Patients and Families

**How Vendors Can Support Patient- and Family-Centered Practices in Ambulatory Settings**

**Exploring the Implementation Hot Topics**—Clinician resistance, mental health, adolescent issues (proxy), opt out/opt in, hiding notes, reminders, strategies to promote the use by patients and clinicians

**OpenNotes and Reaching Culturally Diverse and Traditionally Underserved Communities**

**Enhancing Safety through PFCC and OpenNotes**

**Wrap Up/Next Steps**

**1:30-3:30 pm**

**TRACK #2 Policy and Consumer Organizations (Breakout)**

Facilitated by a faculty team (*John Santa, Cait DesRoches, Steve O'Neill, Liz Salmi, IPFCC faculty*)

## **Luncheon Tabletop Issues for Discussion**

**Issues for Vendor Consideration**—best practices, required support, PFAC involvement in EMR design, availability to small clinician practices

**Strategies for Building Awareness of OpenNotes Availability and How Patients and Families Can Use Notes**—50% of OpenNotes implementers are not informing patients of notes availability (Opportunity for PFACs to help design how this information is communicated to patients and families)

**Mental/Behavioral Health**—A growing gap in information sharing. How to approach from a policy point of view

**Certification of OpenNotes implementation**—Evaluating the quality and impact of an OpenNotes Implementation

**PFCC Related Issues**—The Care Act/Care Partners, Welcome Policies and Practices, Self- Management Support and Patient Activation, Advanced Care Planning

**OpenNotes and Safety**—Diagnostic errors, Malpractice Risk, Risk Management, Early research results

**Wrap Up/Next Steps**

**3:30 pm**

**ADJOURN**