



INSTITUTE FOR PATIENT- AND FAMILY-CENTERED CARE & *OpenNotes*

**Building Mutually Beneficial Partnerships** | October 20, 2017  
Washington, DC



## **Implementing Patient- and Family-Centered Care and OpenNotes: Building Mutually Beneficial Partnerships**

October 20, 2017  
Omni Shoreham Hotel  
Washington, DC

### **Faculty**

Our expert faculty of health care executives, clinicians, staff, and patient and family leaders draw upon their real-world experiences in leading transformation to give you the knowledge, skills, and tools to advance patient- and family-centered care at your organization.

#### **Beverley H. Johnson**



Beverley H. Johnson is President and Chief Executive Officer of the Institute for Patient- and Family-Centered Care (IPFCC) in Bethesda, MD. She has provided technical assistance and consultation for advancing the practice of patient- and family-centered care and creating effective partnerships with patients and families to over 300 hospitals, health systems, federal, state, provincial agencies, military treatment facilities, and community organizations.

Bev served on the inaugural Advisory Board for the American College of Physicians' Center for Patient Partnership in Healthcare. She is currently a member of the Board of Directors for the Patient-Centered Primary Care Collaborative (PCPCC) and has recently been appointed to the Board of Directors for the Association of American Medical Colleges (AAMC). She also serves on the Selection Committee for the American Hospital Quest for Quality Prize.

Bev is a past recipient of the Lloyd Bentsen Award and the Humanitarian Award from Pediatric Nursing. In 2007, she received The Gravens Award for leadership in promoting optimal environments and developmental care for high-risk infants and their families, and The Changemaker Award by the Board for the Center for Health Care Design. In 2008, the National Perinatal Association presented Bev with the Stanley L. Graven Award. More recently, she was a recipient of a Dorland Health 2011 People Award. In 2017, she was recognized by the American College of Physicians with the Edward R. Loveland Memorial Award.

## **John Santa, MD, MPH**



John Santa played a leadership role in starting the Northwest OpenNotes Consortium, and he now directs national dissemination efforts including the organization of regional consortiums focused on implementing OpenNotes. He lives in Oregon but is thrilled to travel throughout the country telling physicians and patients about OpenNotes.

John has over 40 years of experience in clinical medicine and administration, having worked in leadership positions for hospitals, physician groups, insurers and state government. Before coming to OpenNotes, he was Medical Director for the Drug Effectiveness Review Project, one of the country's most robust comparative effectiveness programs, as well as the Director of the Health Ratings Center at Consumer Reports from 2008 to 2014. The Ratings Center focuses on explicit approaches evaluating and comparing health services, products, institutions, and practitioners.

John practiced primary care internal medicine from 1976 to 1992 and 2003 to 2008 and is currently a Board member and Treasurer of the National Physicians Alliance. He has taught in multiple venues—introductory courses to clinical medicine, resident courses in public health, and preventive medicine and health policy courses.

## **Jonathan Bullock**



Jonathan is a principal consultant with Kaiser Permanente's National Service Quality focused on the integration of Person and Family Centered Care with Quality, Care Experience, Safety, and Innovation efforts and practices.

He supports and leads Kaiser Permanente's Patient Partner network and is a coach for Human Centered Design. Jonathan started his career with Kaiser Permanente in 2005 in the Southern California region. In 2012, he relocated to Kaiser Permanente's Northwest region where he was engaged in leading the region's work in patient and family centered care and oversaw a program that included over 200 Patient Partners and multiple Patient and Family Advisory Councils.

Jonathan's passion is improving healthcare by tapping directly into the expertise of patients and their families. Jonathan holds a bachelor's degree from George Fox University and is pursuing a Masters in Healthcare Innovation from Arizona State University.

Jonathan and his family live just outside of Portland, Oregon with their English Springer Spaniel, Bo. In his free time, he enjoys hiking, jet-skiing, wine-tasting, and being the primary cheerleader at his teenage son's sports activities.

### **Amy Cohen, PhD, BCBA, PMP**



Amy Cohen, PhD, BCBA, PMP is the Patient- and Family-Centered Care Program Manager in the Jeffords Institute for Quality at the University of Vermont Medical Center. She joined the Medical Center in January of 2015 after working for 14 years in clinical work in community mental health. While she had prior training in patient- and family-centered care, her greatest preparation for the role has been as the parent of a child with complex special health needs and as a parent advisor and co-chair of the University of Vermont Children's Hospital Patient and Family Advisory Committee.

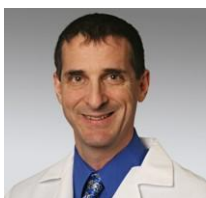
### **Catherine M. DesRoches, DrPH**



Catherine M. (Cait) DesRoches is a distinguished health services researcher with expertise in emerging trends in health care delivery. She came to OpenNotes from Mathematica Policy Research, a national firm with extensive expertise in social policy research, where she was a Senior Fellow studying the use of electronic health records by hospitals and physicians, the effect of health care organizations on physician clinical practice, physician capacity to provide coordinated patient-centered care, and primary care workforce issues. Cait also has extensive experience leading and managing interdisciplinary research aimed at improving health system performance and quality of care.

A graduate of the University of Massachusetts, School of Public Health, and the Joseph P. Mailman School of Public Health at Columbia University where she received her doctoral degree, Cait has worked as research scientist and project director for the Harvard T.H. Chan School of Public Health, and has held faculty positions at Vanderbilt University, Simmons College of Social Work and Harvard Medical School.

### **Kerry Litman, MD, CPPS**



Dr. Kerry Litman is a Family Physician, Physician Quality Director at the Kaiser Permanente San Bernardino County Medical Center, and physician lead for PFCC in the Kaiser Permanente Southern California region.

Kerry has given presentations at Kaiser Permanente National Quality Conferences, the Institute for Healthcare Improvement's National Forums, the Beryl Institute and IPFCC among other venues, presenting on quality and patient engagement work.

He was founder and is physician co-chair of the Kaiser Permanente Southern California Regional Member Advisory Council since 2012, physician founder of the KP Fontana Patient Safety Advisory since 2009, and KP Southern California Video Storytelling program physician champion since 2014. In 2016 he was a co-recipient of the KP Vohs Quality Award for his 'e-Autopsy' program; focused mortality reviews that identify improvement opportunities. Kerry also helped develop

several other programs at his medical center including the Weekly Farmers' Market, Physician Hiking Club, Healthy Catering Program and 'Patient In The Room' video series.

### **Stephen F. O'Neill, BCD, JD**



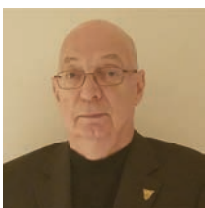
Steve is the Social Work Manager for Psychiatry, Primary Care, Pain Management and Infectious Disease as well as the Associate Director of the Ethics Support Service at Beth Israel Deaconess Medical Center. He completed a Fellowship in Bioethics in the Division of Medical Ethics at Harvard Medical School, is a Clinical Instructor in the Department of Social Medicine and a Faculty Associate in the Center for Bioethics at Harvard Medical School. Steve is also an Adjunct Assistant Professor at Simmons College School of Social Work. He is a Social Work Consultant at the Massachusetts Medical Benevolent Society in Waltham.

He chairs the National Association of Social Work's Massachusetts Chapter's Committee on Ethics and Professional Review, the adjudicatory arm of NASW, and is also a member of the National Ethics Committee of NASW. He helped co-author the NASW Code of Ethics and the NASW Professional Standards.

Steve has extensive teaching experience, numerous committee assignments including the Professional Review Task Force of NASW, Harvard Medical School's Clinical Ethics and Organizational Ethics Consortia and Harvard Medical School's Ethics Leadership Group. He is member of the Preventable Harm to Respect and Dignity initiative within health care at BIDMC as well as a member of BIDMC's Emergency Management Team and the HMS Task Force on Ethical Aspects of Emergency Preparedness. He is the author/co-author of a number of articles, chapters and a book entitled *Legal Issues in Social Work* (2004).

Steve is an expert in Behavioral/Mental Health for the OpenNotes Program and started the first ever program in making behavioral health therapist notes readily available to patients through their personal computers in 2014. He is especially interested in how the transparency of open note writing in behavioral health can foster greater trust and partnership, improve patient engagement and contribute to de-stigmatizing mental illness and behavioral health.

### **Podge M. Reed, Jr.**



In December of 2011, Podge Reed received a bilateral lung transplant at Johns Hopkins. Since his transplant, he has had four medical admissions and two surgical admissions to Hopkins, several ER visits, more than a dozen outpatient procedures, more than 175 outpatient office visits and hundreds of outpatient lab tests, radiology and other studies.

In 2013, Podge enrolled in Hopkins' patient electronic medical record program, MyChart. Upon enrolling, he did an extensive review of the MyChart electronic medical record and wrote an evaluation of it from the patient's perspective, resulting in his appointment to the MyChart Q&A Squad. MyChart has become a key tool in the coordination of his care and for ensuring compliance with his plan of care. In 2014, he wrote a Second Opinion article on OpenNotes for Hopkins Medicine Magazine, stating that OpenNotes would provide better information to patients.

Podge has been a member of the Johns Hopkins Patient and Family Advisory Council (PFAC) since 2012 and currently serves on its executive committee. He has served on the Johns Hopkins Home Health Group Patient and Family Advisory Council and as the patient representative to the Johns Hopkins Emergency Department in the development and implementation of the Emergency Department PFAC.

Podge spent 13 years of his military career as a Medical Service Corps officer. Following his military service, he joined the staff of the American Hospital Association, serving as the Director of Region 3 (seven mid-Atlantic states) and as VP/Special Assistant to the President. Prior to his professional retirement in 2005, he was senior VP to a consulting firm specializing in physician practice management with emphasis on medical record documentation and Medicare billing.

## **Liz Salmi**



Liz Salmi is the OpenNotes Senior Multimedia Communications Manager. She's also a patient who does not have access to her notes.

After receiving a brain cancer diagnosis one week after her 29th birthday, Liz began blogging about her patient experience. From 2008 to 2016, her 500 blog posts (or "patient notes") mirror her 4,800-page medical record. Liz is featured in *The Open Patient: Healing Through Sharing*, a documentary about patients seeking access to their own health data. If people had access to their notes, Liz believes people could be more actively engaged in their health sooner, younger, or before the diagnosis of a serious or chronic condition.

Liz comes to OpenNotes from the Coalition for Compassionate Care of California where she was Director of Communications. She is a 2017 fellow of the Salzburg Global Seminar, a 2016 TEDMED Frontline Scholar, and 2016 Stanford Medicine X e-Patient Scholar. She speaks regularly on how health care professionals and patients are connecting through digital media, including in a 2013 TEDx Talk on how patients are using the Internet to form their own support networks.

Liz lives in Sacramento, California. She serves on the Patient Advisory panel for the BMJ, the Medical Advisory Board for the National Brain Tumor Society, and is a patient reviewer for the Patient-Centered Outcomes Research Institute (PCORI). Her interests include citizen science, the quantified self, open source health data, and neuroscience.

## **Deborah Wachenheim, MPP**



As part of the OpenNotes dissemination team, Deborah helps to spread the implementation of OpenNotes across the country. She has a Masters in Public Policy from the Harvard Kennedy School and a BS from Cornell University.

Deborah has a background in consumer engagement in health care and is working to involve consumers in advocating for Open Notes implementation. Prior to working at OpenNotes, she worked at Health Care For All, a statewide consumer health advocacy organization, engaging consumers in speaking up about the need to improve the quality of health care. She also oversaw the successful consumer campaign to mandate that all Massachusetts hospitals establish Patient and Family Advisory Councils (PFACs) and then she developed a statewide PFAC network to provide technical assistance and resources to PFACs in Massachusetts.

Deborah previously worked at Jewish Vocational Service of Greater Boston, where she developed and ran a food stamp outreach and education program. Before that she coordinated a campus social justice program through the Jewish Community Relations Council of Greater Boston. Deb also worked at RESOLVE, the national infertility organization, as the Director of Government Relations.

## **James Wallace, MD**



Dr. Jim Wallace is the Chief of Radiation Oncology and Leader of the Cancer Service Line at the University of Vermont Medical Center. He is an executive sponsor of Patient and Family Centered Care at the Medical Center and was the physician leader of the Open Notes initiative at UVMMC. His clinical interests include the treatment of genitourinary cancers and his ongoing research focuses on risk-adapted methods of prostate cancer screening and developing new markers for detection of clinically aggressive prostate cancers. He is a native of Burlington, Vermont and enjoys the four seasons and the opportunities they bring to appreciate the outdoors.