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Provider **Inform**atics Group (PIG)
We improve physician and team wellness and effectiveness
by building extraordinary relationships and innovative tools.

OurNotes – patients co-authoring progress notes with providers

To increase patient engagement and provider efficiency: system-wide proposal. Feb 2022, CT Lin

Executive Summary: We seek leadership support on expanding **OurNotes** MHC (My Health Connection patient portal) questionnaire system-wide for all clinics. This supports the strategic priorities for increasing patient engagement, capturing the patient's illness narrative, improving provider efficiency and reducing EHR burden.

WHAT: OurNotes is sent to patients 2 days prior to their appointment to complete an HPI and up to 3 questions. We auto-insert this into providers' progress notes. Patients are informed that responses are NOT seen until appointment. OurNotes is live and well-received across all UCHealth Primary Care return visits.

> **Example** auto inserted in progress note
> HPI
> **Patient Entered Data: How have you been since your last visit?**
> *DIZZINESS, while laying in bed, just turning head will bring it on. Saturday was first day. symptoms returned Sunday and maintained a low grade dizziness through the day. This morning experienced same dizziness laying in bed, rising slowly does not diminish symptoms, currently at office desk and experiencing dizziness and slight pressure headache (behind eyes)*
> **What are the top 3 questions for your visit?**
> *Q1. dizziness*

The WHY (additional rationale):

- Recent federal rule change means there is no longer a need for HPI or ROS for billing
- Open ended questions promote a narrative reply, not "counting bullets"
- OurNotes auto-inserts patient reply into provider's progress note for ease of use
- Patient words within progress notes promotes a sense of patient co-authorship
- We can seek patient input across all clinical areas without building highly specialized questionnaires for every specialty and clinic (high overhead cost and maintenance)
- OurNotes has been successful at the system-level for Mass General Brigham, Beth Israel Deaconness, Geisinger Health, Harborview Seattle, Sanford Health.
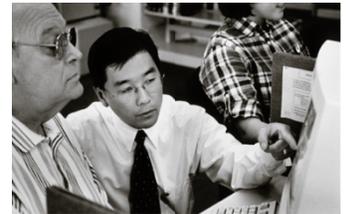
Berwick, "Escape Fire" The Value of Information Access, 1999

When:

2018: QI project at 2 clinics, 2000 patients and 40 primary care providers
2020: Expanded to return visits for ALL primary care practices system-wide
Feb 15, 2022: Plan to add New Patients for ALL primary care practices system-wide

Usage: **38%** of all visits have an OurNotes reply from pt as of 1/2022. Baseline for other pt surveys is ~10%

PROVIDERS Satisfaction

| **100%** agree Does not take more time | **90%** agree Pt HPI useful | **95%** agree Pt questions & priority useful | **Provider**: *…it was helpful … it allowed me to prioritize certain items and make sure the patient was satisfied... It was also helpful when we were short on time … I was able to say "well, we don't have time to talk about everything, but at least we covered your main concern.* |

PATIENTS Satisfaction

| **73%** agree Q help me prep for visit | **87%** agree Sending health update: good idea | **43%** agree Changed convo. w provider | **Patient**: *The very simple nature of the questions and the immediacy just before the visit are very well done … this [is] a no-brainer to do for every patient before every visit. If nothing else, it prompts the patient to think about their care before showing up at the doctor's office.* |

Assessment/Recommendations:

- **Support the expansion of OurNotes across all primary care (new in addition to existing return visits)**
- **Support the gradual deployment of OurNotes to Specialty clinics w Sprint team assistance in FY22.**
- **Support in FY23 deploying OurNotes systemwide** in all clinics, by building consensus among clinical leaders and patient-center care leaders.
- **Physician Informatics, Epic IT and Operational teams will build education tools**, newsletter broadcasts and attend physician leadership meetings to disseminate this change.