OpenNotes Safe Patient Interaction Procedures

Standard Patient Procedure

1. Ask if patient is using or familiar with MyChart and OpenNotes
2. Inform/remind patients that visit notes, including medications lists and histories are available through the MyChart portal, and viewable by anyone with access to their account
3. If the patient indicates that no one else has access to their account, then there is no need to pursue the issue further
4. If the patient states that someone else does have access to their account, or does not give any indication, begin taking patient's history by stating that they have the right to ask anything they say not be shared
5. Review auto populated and copy/pasted notes with patient to ensure accuracy and check that patient wants everything to remain in their notes
6. Refer to ABR list, and check if patients want any ABR topics blocked

Reported/Suspected Abuse or Sexual Assault Procedure

1. Ask if patient is using or familiar with MyChart and OpenNotes
2. Inform/remind patients that visit notes, including medications lists and histories are available through the MyChart portal, and viewable by anyone with access to their account
3. If the patient indicates that no one else has access to their account, then there is no need to pursue the issue further
4. If the patient states that someone else does have access to their account, or does not give any indication, begin taking history by stating that they have the right to ask anything they say not be charted
5. Review auto populated and copy/pasted notes with patient to ensure accuracy and check that patient wants everything to remain in their notes
6. Refer to ABR list, and check patients wants any ABR topics blocked
7. If abuse is reported, confirm with patient whether their abuser might have access or proxy access to their MyChart - especially in the case of elderly patients abused by caretakers
8. If the abuser has access, create a second visit note detailing other parts of the patient visit, with the discussion/assessment of abuse redacted for normal release into the patient portal

Adolescents in Non-Pediatric Settings Procedure

1. Ask if patient is using or familiar with MyChart and OpenNotes
2. Remind accompanying guardians that they can (must) make a separate proxy account to access their child's health information
3. Ask patient's guardian to step out EARLY in the visit
4. Carefully review auto-populated portions of the note, including medications lists, with the patient and ask if they wish for those to appear without restriction in their MyChart portal, while the guardians are outside the room

5. Inform adolescents about their health care rights and confidentiality protections under state law, as well as the information their parents can see and access through MyChart during a time when guardians have left the room

6. Inform adolescents that they have the right to ask anything they say not be released in their portal, or to disclose anything sensitive to the provider before their guardian is invited back into the room.

7. If the guardian of a minor asked something they disclose be kept private from another parent and/or their child, place it in a separate confidential note within the child's records