Hackensack
Meridian *Health*

Pediatrics OpenNotes FAQ

For more information and background on Open Notes and 21st Century Cures, please visit
HMHMaestro.org/OpenNotes or https://www.opennotes.org/.

When did Open Notes take effect?
Initial, partial implementation took effect on March 31, 2021, beginning a 3-month transition period
that ended at midnight on July 1, 2021. MyChart Teen Access launched on January 12, 2022 (*see page
7).*

Why is Open Notes different for pediatric patients compared to other patients?
Pediatric care requires involvement of a parent or a guardian. The patient's family and social history
may contain information reported by one person. This information can be viewed by someone else
like another parent or guardian, or the adolescent. For example, the parent may report a family
history of substance use disorder which will be viewable by the teen when they access their record.
The table below outlines some of the different ways private information may be viewed in MyChart by
a proxy. *Please note, parent is used as a generic term for any adult with rights of guardianship for
the minor and proxy access to the child's MyChart.*

	Reported by	Read by	Privacy/Harm risk
Adult	Self	Self	N/A
Pediatric	Parent A	Parent A	N/A
	Parent A	Parent B	Parent A
	Parent A	Teen < 18 years	Both
	Parent A	Teen ≥ 18 years	Both
	Teen < 18 years	Parent proxy A	Teen < 18 years
	Teen < 18 years	Teen ≥ 18 years	N/A

Why did pediatrics have a 3-month transition period?
The 3-month transition period allowed pediatric providers to work on their templates, and remove or
modify any access/auto-generated information. For example if the patient's "social history" is
automatically pulled from their chart, it may include information that does not need to be in every
note. This transition also gave providers a chance to familiarize themselves with the "share note"
feature. The goal should be to review each note and determine if it is safe to "share" the
note/information with the patient/proxy.

What happened with Open Notes during the transition period?
No note written between **March 31, 2021** and **June 30, 2021** for a patient younger than 18 years will be visible in MyChart to the patient or their designated proxy. Notes written during this time period for patients 17 and younger <u>will never</u> be released or viewable in MyChart by the patient or the proxy.

March 31, 2021 - June 30, 2021
What providers see in Epic:
- The note will have the "share with patient" status by default, which is indicated by a pink color of the 'screen icon' in the note writing activity module in Epic. A provider can manually change this status if a required justification can be documented.

What patients see in MyChart is age dependent:
- For patients 18 years and older, their notes will be visible in MyChart and available for the patient to view if they have activated their MyChart account.
- For patients 17 years and younger, notes written during this transition period <u>will never</u> be visible in MyChart.

July 1, 2021 and beyond
What providers will see in Epic:
- Notes will be marked as "share with patient" by default.

What patients will see in MyChart is age dependent:
- For patients 18 years and older, any "share with patient" notes will be visible in their MyChart if they have activated their account.
- For patients 12 - 17 years, notes will be filtered (i.e.: hidden from their view from within MyChart) for both the patient and their proxy. Upon the patient's 18th birthday, the notes written during this period will be visible to the patient if and when they activate MyChart as an adult. The former proxy will automatically cease to have access.
- For patients younger than 12 years, the notes will be visible in MyChart and available to view if the parent has activated MyChart as the child's proxy.

Age as of 03/31/21	Date Note Written	
	March 31, 2021 – June 30, 2021	July 1, 2021 Onwards
0-11	Shared but never viewable in MyChart	Shared **and** viewable by Proxy in MyChart
12-17	Shared but never viewable in MyChart	Shared and viewable by patient **upon patient turning 18**. Notes are **never** visible to proxy.
18+	Shared **and** viewable by patient in MyChart	

After the note is signed, when will it be visible to pediatric patients or their proxies?
Visibility time frame depends on the patient's age and service location (ambulatory vs. inpatient):

Ambulatory
Notes written between March 31, 2021 and June 30, 2021 and marked for "Share with patient"
- Patients 17 years and younger: Upon signing, notes will remain hidden from view in MyChart by an internal setting within MyChart.
- Patients 18 years and older: Upon signing, notes will be visible to the patient within MyChart.

Notes written July 1, 2021 and later are marked for "Share with patient":
- Patients younger than 12 years: Upon signing, notes will be visible to the proxy in MyChart when the note is signed.

- Patients 12 - 17 years old: Upon signing, notes <u>will not</u> be visible in MyChart. When the patient is 18 years old and activates their own MyChart, they will be able to view the note.

Inpatient
Notes written between March 31, 2021 and June 30, 2021:
- Patients younger than 18 years: Notes are hidden from MyChart regardless of "Share with patient" status indicator.
- Patients 18 years and older: Notes will be visible in MyChart upon discharge.

Notes written July 1, 2021 and after:
- Patients younger than 12 years: Notes will be available to the patient's proxy in MyChart 24 hours after signature.
- Patients 12-17 years old: Notes will remain hidden by an internal Epic setting until the patient turns 18 years of age. Upon the patient's 18th birthday, notes become available in MyChart to the patient only (proxy access is discontinued).
- Patients 18 years and older: Notes will be visible to the patient in their MyChart 24 hours after the note is signed.

How can I share potentially sensitive information with fellow clinicians without sharing with the proxy?
Due to the unique sensitivities facing pediatric notes, the following confidential note types have been created in Epic (see table below). These note types enable clinicians to share family information with fellow clinicians, payors, etc. without making that confidential history available to the patient's proxy(s).

	Note Type ID	Doc Type ID	Release to MyChart	Release to Patient (18+)	Release to Proxy	ROI to Payors, Coding, Billing, Legal, Clinicians, etc.	Cosign Requirements
Confidential Patient History/Document	30434157	100083	Yes (to patient only)**	Yes**	No*	Yes**	Same as Progress Notes
Confidential Maternal/Family History/Document	30434158	100084	No*	No*	No*	Yes**	Same as Progress Notes

Information will <u>not</u> be released to proxy and/or patient via MyChart or HIM request.
**Information will be released and can be accessed through MyChart and HIM and MyChart.*

Where can potentially private/sensitive information be viewed in MyChart?
Private and sensitive information may be visible in the following sections of MyChart:
- Notes
- Health Summary: This section contains a limited view of the patient's problem list, medications, allergies, immunizations and preventative care. A problem will only be visible in this section of MyChart if the box marked "share with patient" is checked.
- Questionnaires: This section includes patient-reported answers to questionnaires.
- Medical and Family History: This section includes patient medical history, family history and social history.
- Appointments and Visits: This section includes past and upcoming visits.
- Test Results
- Upcoming Tests and Procedures
- Document Center: This section includes scanned documents.

Additionally, providers may include information in a note via SmartLink. SmartLinks do not account for patient sharing selections. For example, a problem that is flagged as "not to be shared" with the patient will be visible in a note if a SmartLink brings all problems into the note. The same is true for any component of family history, social history, medication lists, etc.

Adolescents who turn 18 years and activate MyChart may see private information that had previously been reported by a parent. If both parents have proxy access, they may be able to see private information about each other.

What if I blocked a note that I want to share?
You can later choose to share the note with the patient by going back creating an addendum on that note and selecting share with patient. These notes are available upon request to our HIM departments and are part of the legal medical record. A reminder that notes for patients 12-17 years will not be visible in MyChart until the patient is 18 years or older and establishes their own MyChart account.

Will the proxy see that a note is blocked?
No. When a note is blocked, it does not appear in MyChart. A blocked notification is not listed or given to the patient or proxy.

Is MyChart information available for all HMH hospitals? Other Epic sites not in HMH?
MyChart is available for all fully owned, acute HMH hospitals as well as all Medical Group practices on Epic. It is currently not available at Hackensack Meridian *Health* Mountainside or Pascack Valley Medical Centers. It is also not currently available at Carrier Clinic.

Can notes be accessed or viewed by the patient or proxy before being completed or signed?
No. Notes are only visible upon finalization. Please note, notes from residents and Physician Assistants (PAs) are immediately available regardless of co-signature status while Medical Students notes will be available to patients as soon as the co-signer has added his or her final signature.

What are considerations I should make when writing a note?
Approach each note as if it will be viewed by the parent, a proxy or the patient. Examples of things to watch for:
- Content that does not contribute to medical decision-making
- Potentially derogatory or judgmental language
  - Examples: non-compliant, angry, not cooperative
- Differential diagnoses that have not been discussed with the family
  - Examples: cancer, abuse, neglect
- Privacy issues
  - Examples: questions of paternity, parental history of substance abuse, prior abortions, gravida/parity, sensitive genetic information

If the information is necessary for clinical care, you can leave the note "as is" and choose to not share with the patient. You can also consider using a confidential note type that contains the sensitive information which prevents release of the sensitive information to those parties whom you wish to <u>not</u> see the note.

Additionally, if your cell phone number is in your note, consider removing it from your template if you do not want patients calling you directly. You can do this by right clicking on a SmartLink which will enable you to edit the information and remove potentially private information like a cell phone number.

What notes are visible in MyChart?
- Admission Assessment (LPN)
- Anesthesia Pre- and PostProcedure Evaluation
- Bioethics Consult
- Bone Density
- Brief Op Note
- Cardiology Notes
- Care Plan
- Code Documentation Notes
- Consults, including Follow-Up
- Discharge Summary
- ED Notes
    - ED Admit Note
    - ED Discharge Note
    - ED Provider Notes
    - ED Transfer Notes
    - ED Triage Notes
- H&P
- L&D Delivery Note
- Medical Student Notes, after signed by the attending physician

- Miscellaneous
- Note to Patient via Portal
- Nursing notes
- OB Delivery Note
- Observation Provider Note
- Operative Report
    - OR Notes
    - OR Anesthesia
    - OR Nursing
    - OR Pre- & Post-Op
    - OR Surgeon
    - OR Transplant Note
- Patient Care Conference
- Patient Instructions
- Procedures
- Progress Notes
- Rehab H&P
- Transitional Care Note
- Treatment Plan

What notes will not be visible in MyChart?
- Transfer record
- Student notes without co-signature
- Psychiatric and psychotherapy notes
- Inpatient self-administration sheet
- Outpatient self-administration sheet
- Inpatient medication chart
- Outpatient medication chart
- Clinical documentation queries
- Pharmacy
- Anesthesia MIPS/Macra

- Supplementary Notes
- Notes deemed by the clinician to potentially:
    - Cause Patient Harm
    - Contain violations of patient or individual privacy
    - Contain unexpected or sensitive information

What if there is information in the note that should not be shared?

If the note contains information that is potentially harmful if viewed, it can be blocked from release. By default, the note will be marked as "Share w/Patient". To block release of the note, click on the "Share w/Patient" button and select a reason why the note should be blocked (Click to see the full Knowledge Builder for blocking release of a note). You will receive a pop-up notification asking for your reason for blocking.
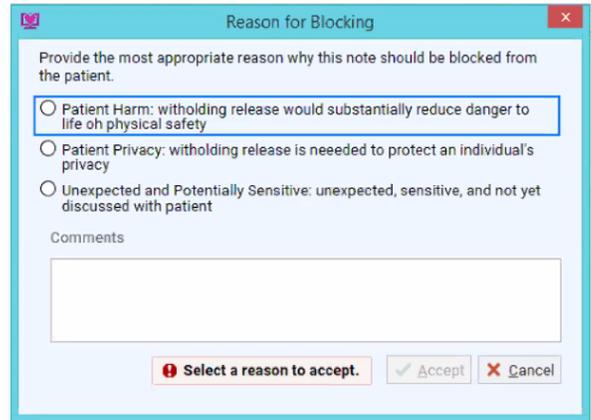
Another option is to consider if there is extraneous information that should be removed from the note. If the specific documentation is not needed to inform clinical decision making, don't put it in the note.
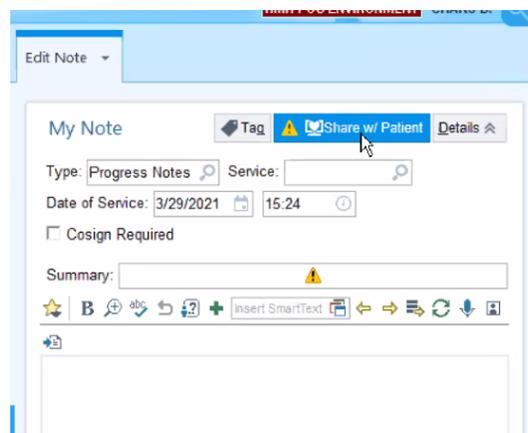
Phrases such as "I have reviewed the social history with the patient" may be enough for documentation and coding.

What if I blocked a note that I want to share?
To release a note that was previously blocked, you can addend any note after July 1, 2021 and change the status to "share with patient". Notes for patients 12-17 years will not be visible in MyChart until the patient is 18 years or older and establishes their own MyChart account.

**Are other encounters shared like telephone and office encounters?**
- Office Encounters: The Progress Note documents what occurred with the patient present; this is a billable encounter and is released to MyChart unless the option to not share is selected.
- Telephone Encounters: The Telephone Note documents what occurred when the patient is on the phone. It is currently billable when used in lieu of a face-to-face visit (CMS waiver for COVID). This is not released to MyChart.
- Documentation Encounters: The Progress Note is for documentation of events that occur outside of an encounter. This is not generally billable but is released to MyChart unless the option to not share is selected.

Will there be new confidential note templates available in Epic?
Yes, new confidential note templates are available. The new templates are:
- NICUHP
- NEWBORNHP
- MATERNALHISTORYCONFIDENTIALNOTE
- DELIVERYROOMATTENDANCENNOTE
- CONFIDENTIALADOLPATIENTNOTE

We encourage the use of these note templates. If you need to document additional information, add it to the note but be mindful of how that specific note is shared.
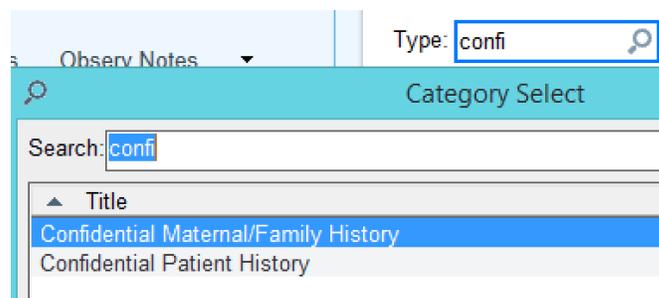
To add maternal history to a baby's chart or to document confidential information about an adolescent, you must select a confidential note type and then choose the appropriate template. If you select the template without selecting a confidential note type then the note will not be a confidential note and will follow standard release practices.

About MyChart Teen

What is MyChart Teen Access?
MyChart Teen Access is a new class of MyChart access that will be used for patients aged 12-17. MyChart Teen Access will enable our teenaged patients and their proxies to access their medical information while also maintaining privacy around sensitive issues.

MyChart Teen Chart *Age as of 01/01/22*		
	Patient (12-17)	**Proxy**
Demographics	Access to: ● Demographics ● Sexuality ● Gender	Access to: ● Demographics Hidden from proxy: ● Sexuality ● Gender
Notes	Shared and viewable by patient **upon patient turning 18.**	Notes are **never** visible to proxy.
Visit Specialties	All visits are visible.	Hidden from proxy: ● Behavioral Health (i.e. mental health, substance abuse, etc.) ● OB-Gyn ● Adolescent Medicine
Medicines	All medicines visible.	Hidden from proxy: ● Plan B - Levonorgestrel ● Ella - ulitristal acetate ● Antiretrovirals (HIV) ● IUD ● Depo-provera ● Etonogestrel ● Oral Contraceptive Pills (OCP) ● Misoprostol ● Mifepristone
Imaging	All imaging visible.	Defaulted to Manual Release for anatomical females: ● Pelvic ultrasound

These new MyChart rules are network-wide and apply to both pediatrics and non-pediatric physicians (i.e. family medicine). If there is risk of harm from release of health information, clinicians are able to opt out of release and designate the reason. The Problem List will be released unless the clinician selects "do not share with patient."

How is MyChart Teen Access activated?
At the patient's first visit following their 12th birthday, the patient and proxy will be provided a new MyChart form to fill out. This new form will ensure HMH is taking the appropriate steps to secure patient privacy while maintaining access. If the new form is not filled out and submitted, the patient and their proxy will have restricted proxy access until the new form is filled out. Under restricted

access, proxies and patients will only have access to limited information like demographics and immunizations.

When a patient turns 18, their proxy will be automatically notified that they no longer have access to their teen's MyChart account. The 18-year-old will then receive full access to their MyChart, including notes.

Who is responsible for assessing the patient and proxy for MyChart Teen Access?
It is the physician's and/or mid-level practitioner's responsibility to assess the patient and approve access to MyChart Teen. If the provider does not feel capable of properly making this assessment, they should refer the patient to their HMH PCP.