Template email introducing OpenNotes to patients

*Use the template email message below to introduce OpenNotes to your patients. Remember to insert the name of the patient portal you use in your practice and adapt the highlighted sections to match your launch date and the terminology used by your patient portal platform. You should also identify a contact person and provide an email address so patients can reach out if they have any questions. The module toolkit includes a patient FAQ that you can provide as a handout or link to through your patient portal depending on your system’s capabilities.*

**Subject: OpenNotes is coming to [patient portal name] [date]**

We are pleased to announce that starting [date], you will be given online access to the health care notes your doctors, nurses or other clinicians write after your appointment. We call this OpenNotes. You will be invited to read your notes on [patient portal name] – your secure, confidential patient website. Please read the brief introduction to OpenNotes below, and see our patient FAQ handout for more information.

**What’s in the notes?**

Each time you have an appointment or discussion with your clinician, he or she describes what happened in a note. Notes often start by listing the symptoms or questions you have. Some also list the medications you take or medications prescribed during a visit, findings of your physical exam (such as blood pressure or how your lungs sound), lab tests ordered, and the overall plan for taking care of you. Notes become a part of your medical record.

**Why are we sharing notes with you?**

We know from research that patients both like and use OpenNotes. They report that reading their notes is a way to better understand and feel more in control of their health care.

**When will you see a note and how will it work?**

You will receive a [patient portal name] message when a new note is available for you to read. To see your notes, you will select the “Records” button on the left side of the screen, and then select the “Notes” button.

**How do we know the notes are private and confidential?**

OpenNotes will not change the confidential nature of the notes your clinicians write. Only you and the clinicians involved in your care have access to these notes. Here are steps you can take to help keep your information secure:

* Remember to keep your [patient portal name] login name and password private. You can change your password any time by selecting the “Settings” button.
* Wherever you look at your account, always exit the [patient portal name] by selecting “Sign out” when you are finished and close the browser window.

**What if you do not want to see your notes online?**

You may request not to see your notes online. To opt out, please email [contact name] at [email address].

**To learn more about OpenNotes**

Please click the link below to see our Patient FAQ. If your question is not included in the FAQ, please email [contact name] at [email address]. You can also learn more at opennotes.org*.*

Example provided courtesy of OpenNotes and adapted for STEPS Forward™.

Source: *AMA. Practice transformation series: OpenNotes. 2017.*