

**Harvard Medical School  
CURRICULUM VITAE**

**Date Prepared:** March 2022

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**Education:**

1973	B Music, <i>high honors</i> , Wichita State University
1977	BSN, <i>summa cum laude</i> , University of Kansas
1984	MBA, <i>high honors</i> , Boston University

**Faculty Academic Appointments:**

1994-2004	Research Associate in Medicine, Harvard Medical School
2004-2012	Instructor in Medicine, Harvard Medical School
2012-2013	Principal Associate in Medicine, Harvard Medical School
2013-2017	Assistant Professor of Medicine, Harvard Medical School
2017-	Associate Professor of Medicine, Harvard Medical School

**Appointments at Hospitals / Affiliated Institutions:**

Past:

1977-1982 Allied Health with Privileges, Boston City Hospital

Current:

2007- Research Faculty, Division of General Medicine and Primary Care  
Beth Israel Deaconess Medical Center

**Other Professional Positions:**

1977-1980	Staff Nurse, Boston City Hospital, Boston, MA
1980-1982	Head Nurse, Coronary Care and Progressive Care Units Boston City Hospital, Boston, MA
1984-1985	Senior Analyst, Health Data Institute, Wellesley, MA
1986-1987	Project Manager, Health Data Institute, Lexington, MA
1987-1988	Unit Manager, Health Data Institute, Lexington, MA

1988-1989 Senior Consultant, Health Data Institute, Lexington, MA

**Major Administrative Leadership Positions:**

Local:

1990-1994 Assistant Director, Picker/Commonwealth Program for Patient-Centered Care, Beth Israel Hospital  
1994-1997 Director, Survey Services, The Picker Institute, Boston, MA  
1997-1999 Vice President, Client Services, The Picker Institute, Boston, MA  
1999-2001 Vice President, Client Services & Research, The Picker Institute Boston, MA  
2002-2006 Executive Director, Center for Information Technology Leadership Partners HealthCare System  
2007-2011 Director of Research and Evaluation, The Albert Schweitzer Fellowship Beth Israel Deaconess Medical Center  
2009- Co-Founder OpenNotes, Beth Israel Deaconess Medical Center  
2009-2016 Co-Director, OpenNotes, Beth Israel Deaconess Medical Center

**Committee Service:**

Local:

2007-2008 Strategic Planning Group, Member, The Albert Schweitzer Fellowship Beth Israel Deaconess Medical Center  
2009-2010 Evaluation Work Group, Chair, The Albert Schweitzer Fellowship Beth Israel Deaconess Medical Center  
2011 Research Group for Standard Operating Procedures, Member, Division of General Medicine and Primary Care, Beth Israel Deaconess Medical Center  
2013-2015 Executive Committee, Member, OpenNotes/PatientSite, Beth Israel Deaconess Medical Center

National:

1997-1998; Picker Europe Strategy Group, Member, Picker Institute  
2006 Annual Patient Safety and Health Information Technology Conference Track Co-Chair, Assessing Value and Evaluating Health Information Technology, Agency for Healthcare Research and Quality  
2013 Member, Review Panel for Clinical Data Research Networks, Patient-Centered Outcomes Research Institute (PCORI), Washington, DC (agency-funded by the Affordable Care Act)

**Professional Societies:**

2002-2005 Academy Health, Member  
2002-2006 Health Information and Management Systems Society, Member  
2002-2019 Society of General Internal Medicine, Member  
2002-2007; American Medical Informatics Association

2010-	
2005	Poster Subcommittee, Scientific Program Committee, Annual Meeting
2015	Reviewer, 2015 Annual Symposium
2013-2018	American Organization of Nurse Executives, Member
2013-2018	American Nurses Association, Member

### Editorial Activities:

#### Ad hoc Reviewer:

2005-	Health Affairs
2005-	Journal of General Internal Medicine
2011-	Journal of Health Care for the Poor and Underserved
2012-	Journal of Medical Internet Research
2012 -	International Journal of Medical Informatics
2013-	New England Journal of Medicine
2013-	Annals of Internal Medicine
2014-	The Milbank Quarterly
2014-	Journal of Oncology Practice
2016-	Patient Education and Counseling
2018-	Clinical Medicine
2018-	Journal of Medical Internet Research Mental Health
2019-	BMJ Open
2019-	Journal of Cancer Survivorship
2019	JMIR Research Protocols
2019-	Pediatrics
2020-	Journal of Asthma

#### Other Editorial Roles:

1992-1993	Editor, <i>Patient-Centered Care News</i> , Picker-Commonwealth Program for Patient-Centered Care, Beth Israel Hospital
2014-2019	Deputy Editor, Journal of General Internal Medicine

### Honors and Prizes:

1973	Mortar Board Senior Honor Society, Wichita State University
1973	Phi Kappa Phi, Wichita State University
1984	Beta Gamma Sigma Business Honor Society, Boston University
2013	Massachusetts Innovator of the Year 2013 Healthcare: Doctor's Notes Demystified, <i>The Boston Globe</i> , Globe 100, Best of Massachusetts Business, May 19, 2013, one of 13 individuals recognized
2014	John Q. Sherman Award for Excellence in Patient Engagement, awarded to the OpenNotes Collaborative, National Patient Safety Foundation
2017	Health Data Liberators Award, awarded to Tom Delbanco, Jan Walker, and the OpenNotes Initiative, by AcademyHealth

### REPORT OF FUNDED AND UNFUNDED PROJECTS

**Funding Information:**Past Funding:

- 1993-1994     *National Survey of Patient-Centered Care with Development and Testing of a Short Survey Instrument*  
The Commonwealth Fund  
Co-Principal Investigator (Co-PI: Paul D. Cleary, PhD)  
The major goal of the study was to validate a short survey instrument against results of a longer version. My role was to develop the short instrument.
- 1995-1996     *Development and Testing of a Survey Instrument to Evaluate Consumer-Centered Home and Community Care*  
The Commonwealth Fund  
Co-Principal Investigator (Co-PI: Penny Hollander Feldman, PhD)  
The major goal of the study was to develop and test a survey instrument that could evaluate patients' experiences with home care. My role was to characterize the home care industry and convene a meeting of providers representing major provider segments.
- 1997            *Incorporating Patient-Reported Quality of Care into Outcomes-Based Quality Improvement: Planning Phase*  
Robert Wood Johnson Foundation  
Principal Investigator (\$30,000)  
The major goal of the study was to review the literature, assay national activities in home care, and develop a proposal for a national survey of home care. After exploration, we determined a national survey was not feasible given the resources available.
- 1999-2000     *Development of a Hospital Employee Survey Instrument*  
The Commonwealth Fund  
Project Co-Director (PI: Susan Edgman-Levitan)  
The purpose of the project was to develop a survey instrument for hospital employees that would evaluate factors associated with delivery of patient-centered care. I advised project scientists on development of interview guides survey items.
- 2002-2003     *Value of Ambulatory Computerized Provider Order Entry in California*  
California HealthCare Foundation  
Co-Principal Investigator (Co-PI: Blackford Middleton, MD) (\$64,706)  
The major goal of the study was to research the clinical, financial, and organizational value of ambulatory computerized physician order entry in California. My role was to oversee analysis and writing of the project report.
- 2003-2004     *Assessing the Value of Healthcare Information Exchange*

*and Interoperability*

Foundation for eHealth Initiative

Project Director (PI: Blackford Middleton, MD) (\$75,000)

The goal of this grant was to define a value proposition for national electronic healthcare information exchange and interoperability. My role was to develop a value model for public health application, to oversee the project, and to write a paper documenting our findings (published in *Health Affairs*, citation #12).

- 2004-2005 *Value of Healthcare Information Technology in Chronic Disease Management*  
Robert Wood Johnson Foundation  
Project Director (PI: Blackford Middleton, MD) (\$297,504)  
The goal of this grant was to define a value proposition for information technologies in chronic disease management. My role was to oversee analytic progress, to write sections of the final report, and to help prepare manuscripts.
- 2004-2006 *Health Information Technology Resource Center*  
Agency for Healthcare Research and Quality, contract 290-04-0016  
Site Principal Investigator (Master Contractor: National Opinion Research Center, PI: Dan Gaylin, MPA) (total direct costs unknown)  
The goal of this contract was to provide support to AHRQ-funded health information technology grantees and to provide a website for disseminating findings. My role was to oversee contributions of the Center for IT Leadership at Partners Healthcare System. Specifically, we led the development of tools for evaluation of health information technology projects.
- 2006-2007 *Patient Computing: Insights from Consumers, Patients, and Health Professionals*  
Robert Wood Johnson Foundation, research grant 56392  
Project Director (PI: Tom Delbanco, MD) (\$178,651)  
The major goal of this qualitative study was to learn about people's expectations about the use of information technologies in health care. My role was to develop discussion guides, define subject characteristics and supervise focus group subcontractors in 4 sites, interpret the data, and lead preparation of a manuscript (published in *JGIM*, citation #17).
- 2007-2008 *Healthcare Resource Use, Quality of Care, and Patient Perceptions of Care: Planning Grant*  
MDVIP, Inc., investigator-initiated research project  
Co-Investigator/Project Director (PI: Russell Phillips, MD) (\$57,586)  
The goal of this project was to develop a proposal for evaluating healthcare utilization, quality of care, and patients' experiences in retainer or "concierge" care. My role was to develop the background, survey proposal, and project budget. Unfortunately, our request to AHRQ for funding of the full proposal was unsuccessful and the project did not move forward.

- 2008-2009     *OpenNotes: Planning Phase*  
Robert Wood Johnson Foundation, research grant 64990  
Co-Principal Investigator/Project Director (Co-PI: Tom Delbanco, MD)  
(\$118,240)  
The goal of the project was to develop a proposal for a multi-site demonstration and evaluation in which primary care physicians would share visit notes with patients. My roles were to develop the overall project plan, survey and qualitative research plan, intervention parameters and project budget.
- 2009-2011     *OpenNotes: Demonstrating and Evaluating Transparency in Primary Care (Phase 2)*  
Robert Wood Johnson Foundation, research grant 65921  
Co-Principal Investigator/Project Director (Co-PI: Tom Delbanco, MD. Dr. Delbanco was the Principal Clinical Investigator and I was the Principal Research Investigator) (\$1,397,370)  
The major goal of the study was to evaluate the impact on patients and physicians of opening primary care visit notes to patients on a secure website. My roles were to direct overall activities of the three sites (in Massachusetts, Pennsylvania and Washington State), to obtain IRB approvals, to develop survey instruments that measure attitudes and experiences, to interpret qualitative data from participants, to design and oversee the operational flow of the intervention at BIDMC, to coordinate the overall evaluation, and to lead authorship in the principal manuscripts reporting results in peer-reviewed scientific journals (citations #18, #20, and #21).
- 2011-2012     *Evolution of OpenNotes: Documenting and Evaluating Transparency in Primary Care (Phase 3)*  
Robert Wood Johnson Foundation, research grant 69488  
Co-Principal Investigator/Project Director (Co-PI: Tom Delbanco, MD. Dr. Delbanco was the Principal Clinical Investigator and I was the Principal Research Investigator) (\$657,392)  
The objectives of this phase of the OpenNotes initiative were to evaluate the OpenNotes intervention in three sites, to expand OpenNotes beyond the patients, doctors, and institutions involved in the initial experiment, and to engage the public and policymakers in the idea of OpenNotes as a standard of care. My role was to lead research activities and staffing, group interviews, social media coordination, and production of peer-reviewed papers (citations #21 and #22).
- I was also Principal Investigator of a separate pilot study funded in this grant. The objective of *Getting My Records*, a study in which we were collaborating with Consumer Reports, was to determine what steps patients go through to obtain copies of their medical records. Unfortunately, few Consumer Reports members responded to the call for participation and the study was terminated before completion.

- 2012-2013 *OpenNotes: Demonstrating and Evaluating Transparency in Primary Care (Phase 4)*  
Robert Wood Johnson Foundation, research grant 70632  
Co-Principal Investigator/Project Director (Co-PI: Tom Delbanco, MD. Dr. Delbanco was the Principal Clinical Investigator and I was the Principal Research Investigator) (\$449,680)  
The primary objective of this phase was to plan a strategy with the Robert Wood Johnson Foundation and others to propel OpenNotes toward becoming a national standard of care. The planning culminated in a new grant proposal (*Phase 5*) to implement the strategy. Another objective was to publish additional papers from the study database.
- 2013-2015 *OpenNotes: Supporting Expansion of the Practice of Giving Patients Access to Physicians' Medical Notes (Phase 5)*  
Robert Wood Johnson Foundation, research grant 71082  
Co-Principal Investigator/Project Director (Co-PI: Tom Delbanco, MD. Dr. Delbanco was the Principal Clinical Investigator and I was the Principal Research Investigator) (\$2,144,240)  
Our primary objective was for the nation to reach a tipping point that leads OpenNotes to become a national standard of care. We did this by: a) building a "movement" that focused on both health professionals and consumers, b) pursuing an adoption strategy that targeted high profile providers, c) developing resources that facilitated change: e.g., toolkits, webinars, a national conference, website, d) adding to the OpenNotes knowledge base by disseminating findings from the process and outcomes of our ambulatory care interventions, and e) promoting and facilitating the evolution of future leaders to support and study the further effects of transparency in health care.
- 2013-2015 *Transparency through OpenNotes: Sharing Visit Notes to Decrease Diagnostic Error and Enhance Patient Safety*  
CRICO / Risk Management Foundation of the Harvard Medical Institutions, Inc. (RMF)  
Co-Investigator (PI: Sigall Bell, MD) (\$498,521)  
The objectives were to assess the potential for patients' online access to clinician notes to decrease diagnostic error, improve patient safety and activation and reduce claims.
- 2013-2018\* *InfoSAGE: Information Sharing across Generations and Environments*  
Agency for Healthcare Research & Quality, research grant 1R01HS021495-01A1  
Co-Investigator (PI: Charles Safran, MD) (\$2,407,309)  
The objectives were 1) to identify information needs of elders and those caring for them, 2) to develop an online environment (InfoSAGE) to foster needed communication, 3) to study information management behaviors using InfoSAGE, and 4) to evaluate the extent to which InfoSAGE improves communication, coordination, and collaboration for elders and families. My role was to design, direct, and study focus groups that would identify information and services needed by elders and their adult

children, and to illuminate how they find health information currently and with whom they share it. \*My work was completed in 2015; two papers have been published (citations #29 and #36).

- 2015-2016 *The OpenNotes Safety Initiative: A Multi-Site Expansion*  
 CRICO /Risk Management Foundation of the Harvard Medical Institutions, Inc. (RMF)  
 Co-Investigator (PI: Sigall Bell, MD) (\$470,361)  
 The objectives were to expand a patient safety reporting mechanism beyond primary care at BIDMC, to implement the system at Boston Children’s Hospital, and to evaluate its impact in these new patient populations.
- 2015-2018 *OpenNotes: Spread, Discovery and Measurement*  
 Cambia Health Foundation (Transforming Health Care Track)  
 Investigator (PI: Tom Delbanco, MD) (\$1,075,200)  
 The objectives are as listed in a previous entry, with special emphasis on work in Idaho, Washington State, Oregon, and Utah.
- 2015-2019 *OpenNotes: Spread, Discovery and Measurement*  
 Gordon and Betty Moore Foundation, research grant #4926  
 Principal Investigator (\$3,750,000)  
 We have three major objectives: 1) establishing OpenNotes as a national standard of care through multiple organized advocacy efforts, raising the number of patients with access to notes from 5 million today to 50 million in three years, 2) continuing to innovate using OpenNotes and transparency with new populations (e.g., patients with mental illness, family caregivers), new uses (e.g., using transparency to catch mistakes before they become medical errors, using notes in patient education), and new sites (e.g., inpatient care, long term care), and 3) evaluating the impact of OpenNotes through research and program evaluation.
- 2015-2019 *OpenNotes: Spread, Discovery and Measurement*  
 Robert Wood Johnson Foundation, research grant #73038  
 Principal Investigator (\$3,750,000)  
 The objectives are as listed above.
- 2015-2019 *OpenNotes: Spread, Discovery and Measurement*  
 Peterson Center on Healthcare, #16019  
 Principal Investigator (\$1,500,000)  
 The objectives are as listed above.
- 2015-2020 *OurNotes: A New Strategy to Improve Care for Complex Patients*  
 The Commonwealth Fund, grant #20140639  
 Principal Investigator (\$457,309)  
 The objectives of this 4-site study are to design and pilot approaches to having patients and their family caregivers contribute to their notes online.
- 2019-2020 *OpenNotes and OurNotes*



Cambia Health Foundation  
Investigator (PI : Cait DesRoches) (\$350,029)  
The objective is to support dissemination in 4 states.

2019-2020     *Embedding OpenNotes into the culture of medicine: Moving beyond early adopters*  
Gordon and Betty Moore Foundation  
Investigator (PI: Cait DesRoches) (\$950,000)  
The objective is to support dissemination of OpenNotes and OurNotes and to develop intervention case studies.

Current Funding:

2018-2022     *Patient Priorities Care: Dissemination and Scaling*  
The John A. Hartford Foundation grant #2018-0064, sub-award from Yale University  
Site principal investigator (\$672,511)  
The BIDMC objective is to test an online version of Patient Priorities Care, developed by Yale investigators, in a clinical practice and to pilot it alongside OurNotes in a patient portal.

**REPORT OF LOCAL TEACHING AND TRAINING**

**Teaching of Students:**

1994-2001     Quality of Care from the Patient's Perspective (Lecturer)  
MBA students  
Boston University School of Management  
90 minute lecture

2003            Assessing Value in Healthcare Information Technology (Lecturer)  
MBA students  
Boston University School of Management  
90 minute lecture

2004            Electronic Order Entry in Ambulatory Care (Lecturer)  
MBA students  
Boston University School of Management  
90 minute lecture

2005            The Value of Electronic Information Exchange and Interoperability in Health Care (Lecturer)  
MBA students  
Boston University School of Management  
90 minute lecture

2014            Transparent Medical Records (Lecturer)

- MBA students  
Boston University School of Management  
90 minute lecture
- 2016 Transparency in Care (Lecturer)  
MBA students  
Boston University Questrom School of Business  
90 minute lecture
- 2017 Can We Change the Standard of Care?  
MBA students  
Boston University Questrom School of Business  
90 minute lecture
- 2017 Where Will Fully Transparent Records Take Us?  
HMS students  
Center for Primary Care, Harvard Medical School  
90 minute lecture and discussion
- 2018 Basic Survey and Qualitative Methods  
HMS General Internal Medicine fellows  
60 minute lecture and discussion
- 2018 The New Transparency in Care  
MBA students  
Boston University Questrom School of Business  
90 minute lecture and discussion
- 2018 Transparency in Care: OpenNotes Advocacy & Research  
PhD nursing students and faculty  
Scholarly Dialogues series  
College of Nursing and Health Sciences, University of Massachusetts,  
Boston  
60 minute lecture and discussion
- 2019 Basic Survey and Qualitative Methods  
HMS General Internal Medicine fellows  
60 minute lecture and discussion

**Research Supervisory and Training Responsibilities:**

- 1994 Supervisor/Mentor, Graduate Student Internship  
Boston University Graduate School of Management  
Advisee: Maureen Farrell  
Four hours per week for 3 months  
The internship is a degree requirement. The purpose of the mentoring was to introduce the intern to corporate marketing and to guide completion of market research that would inform decisions about planned growth of the Picker Institute.

- 1997      Advisor, Students, Harvard Business School  
Advisees: four students in HBS Strategic Planning course  
20 hours over 2 months  
I collaborated in preparation of a new strategic plan for the Picker Institute, which was examining whether or not to expand.
- 1998      Supervisor/Mentor, Graduate Student Internship  
Boston University Graduate School of Management  
Advisee: Melinda Katzman  
Four hours per week for 3 months  
The internship is a degree requirement. The purpose of the mentoring was to introduce the intern to the corporate senior management environment and to guide development of a business plan for a new Picker Institute hospital survey product.
- 2004-2006      Advisor to Research Fellow, Center for Information Technology Leadership (CITL)  
Boston Area Biomedical Informatics Training Program  
Harvard University  
Advisee: David Kendrick, MD  
One hour weekly averaged over 2 years  
I advised Dr. Kendrick on development of value models for health information technologies.
- 2012      Advisor to Coumadin Clinic  
Beth Israel Deaconess Medical Center  
Four hours over 2 months  
Survey assessment program
- 2014      Advisor/Mentor to PhD Nursing Student  
Advisee: Jacob K. Kariuki, PhD candidate, Research Fellow  
Currently Assistant Professor at the University of Pittsburgh School of Nursing  
20 hours over 6 months  
Advised on design and implementation of a qualitative study of ambulatory nursing documentation.
- 2014-2015      Supervisor/Mentor, Graduate Student Internship  
SDA Bocconi School of Management, Bocconi University, Milan, Italy  
Advisee: Luisa Lentini  
Two hours per week for 5 months  
The internship is a degree requirement in the Master of International Health Economics and Policy program. The goals of the internship were to introduce the intern to the U.S. healthcare system and to develop an expanded marketing plan for OpenNotes.
- 2014-2015      Advisor to Nurse Practitioner  
Beth Israel Deaconess Medical Center

Advisee: Meghan Shanahan, RN, NP  
20 hours over 6 months  
Advised on development of surveys of patients and providers in the  
BIDMC Department of Psychiatry.

2016            Supervisor/Mentor  
Summer Student Internship (summer between graduation  
from BU and starting BU medical school)  
Advisee: Jacqueline You  
4 hours per week for 2 months  
The goal of this internship was to complete background research for a  
potential paper on the capabilities of different electronic medical records  
and patient portals.

**Mentored Trainees and Faculty:**

- 2008-2009    Mohammad Al Redha, MD, Research Fellow  
*Career stage:* Clinical Informatics Fellow, HMS and BIDMC  
Currently Director, Executive Office for Organizational Transformation,  
Dubai Health Authority  
*Mentoring role:* advisor/mentor (8 hours in total)  
*Accomplishments:* Advised on all aspects of focus group research, in  
preparation for groups with Dubai patients and physicians addressing  
diabetes care.
- 2008-2009    Shane Reti, MD, MP, Research Fellow  
*Career stage:* Clinical Informatics Fellow, HMS and BIDMC  
Currently MP in New Zealand Parliament  
*Mentoring role:* advisor/mentor (8 hours in total)  
*Accomplishments:* In preparation for a series of interviews about personal  
health records, advised about what patients are looking for in PHRs and  
helped structure the interview protocol.
- 2008-2009    Karen Luxford, PhD, Research Fellow  
*Career stage:* Harkness Fellow, HMS and BIDMC  
Currently, Lecturer, University of New South Wales (UNSW) Australia,  
and Director, Patient-Based Care, Clinical Excellence Commission of  
Sydney, Australia  
*Mentoring role:* advisor/mentor (20 hours in total)  
*Accomplishments:* Advised on interview questions, obtaining IRB  
approvals, and analysis of qualitative data from a series of discussions  
with CEOs and other leaders about quality improvement, assisted with  
preparation of manuscript.
- 2011-2012    Carrie Morgenstein, MD, Research student  
*Career stage:* Senior medical resident, BIDMC  
Currently, Hospitalist, Newton-Wellesley Hospital  
*Mentoring role:* advisor/mentor (8 hours in total)

*Accomplishments:* Advised on developing and conducting a survey about trainees' career plans related to primary care.

- 2011-2015 Bradley H. Crotty, MD, MPH, Research Fellow  
*Career stage:* General Medicine fellow at HMS and BIDMC 2011-2013; BIDMC Information Systems Clinical Liaison 2013-2016.  
 Currently, Assistant Professor of Medicine, Medical College of Wisconsin, Internal Medicine/Clinical Informatics, Inception Health/Froedtert Hospital, Milwaukee, WI  
*Mentoring role:* advisor to fellow/junior faculty mentor

2011	20 hours
2014	80 hours
2015	100 hours

*Accomplishments:* Mentored 1) in 2011 on a study testing microblog technology at hospital discharge, 2) in 2014-2015 on study questions, design, and preparation of a paper on the impact of OpenNotes on trainees, and 3) in 2015 on all aspects of qualitative data analysis and preparation of 2 papers in a study of elders' and their families' use of information technology.

- 2012-2013 Michelle L. Dossett, MD, PhD, MPH, Research Fellow  
*Career stage:* general medicine fellow at HMS and BIDMC  
 Currently, Assistant Professor of Medicine, Harvard Medical School/Physician, Benson-Henry Institute for Mind-Body Medicine, Massachusetts General Hospital, Boston, MA  
*Mentoring role:* advisor/mentor

2012	2 hours
2013	2 hours

*Accomplishments:* Advised on qualitative data analysis and preparation of a program evaluation paper.

- 2013 Lydia A. Flier, MD, Research student  
*Career stage:* HMS student  
 Currently Clinical Fellow in Medicine, Beth Israel Deaconess Medical Center, HMS  
*Mentoring role:* advisor/mentor

2013	4 hours
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*Accomplishments:* Advised on data collection, analysis, and preparation of a paper on a qualitative study related to graduate medical education.

- 2013-2014 Tobias Esch, MD, Research Fellow  
*Career stage:* Harkness Fellow, HMS/BIDMC  
 Currently Professor of Integrative Primary Health Care, Faculty of Health/School of Medicine, Witten/Herdecke University, Germany  
*Mentoring role:* faculty mentor

2013	25 hours
2014	25 hours

*Accomplishments:* Mentored on design, obtaining IRB approval, analysis of qualitative data, and preparation of a paper on an in-depth social analysis of patient attitudes toward open visit notes.

2013-2017

John N. Mafi, MD, MPH, Research Fellow

*Career stage:* General Medicine fellow at HMS and BIDMC 2012-2016; moved to UCLA in the fall, 2016. I continued to mentor him in preparing a manuscript, now published in the Annals of Internal Medicine. Currently Assistant Professor of Medicine, University of California Los Angeles (UCLA)

*Mentoring role:* advisor/mentor

2013	20 hours
2014	40 hours
2015	40 hours
2016	100 hours
2017	80 hours

*Accomplishments:* I mentored 1) in 2013-2015 on preparation of 2 abstracts and a quantitative analysis paper on note reading behaviors of patients, 2) in 2014 on preparation of a grant proposal for OurNotes submitted to and funded by The Commonwealth Fund, 3) in 2015 on interview protocols and methods, and 4) in 2016-2017 on all aspects of qualitative data analysis as well as preparation of a paper (published in Annals of Internal Medicine) reporting on a series of expert interviews.

2017-2018

Matthew Germak, MD, Research Fellow

*Career stage:* CRICO/HMS Fellow in Patient Safety and Quality, Beth Israel Deaconess Medical Center and Harvard Medical School

*Mentoring role:* faculty mentor

2017	60 hours
2018	60 hours

*Accomplishments:* Mentoring on a pilot of OurNotes in BIDMC Healthcare Associates and at the University of Colorado, Dartmouth Hitchcock Medical Center, and the University of Washington, from design through deployment, evaluation, and writing results papers. Collaborated on 2018 SGIM workshop preparation and presentation.

2019

Brynn Marks, MD, Endocrinology Fellow

*Career stage:* Endocrinology Fellow, Boston Children's Hospital

*Mentoring role:* Faculty advisor

2019	2 hours
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*Accomplishments:* Advised on effective approaches to feedback and advocacy to expand uptake of new insulin pump technology among patients and parents.

2019-2020

Maria Hägglund, PhD, Research Fellow

*Career stage:* Lecturer in Medicine and Keane Scholar, Harvard Medical School

*Mentoring role:* Faculty advisor

2019	40 hours
2020	20 hours

*Accomplishments:* Advised on patient access in US healthcare system and potential structure of a series of case studies.

2019-2021 Charlotte Blease, PhD, Research Fellow  
*Career stage:* Keane Scholar, Harvard Medical School  
*Mentoring role:* Faculty advisor

2019	40 hours
2020	60 hours
2021	50 hours

*Accomplishments:* Advised on writing papers related to transparency in US healthcare.

**Local Invited Presentations:**

*Those presentations below sponsored by outside entities are so noted and the sponsors are identified*

- 1995      Designing a Patient Feedback System to Meet Your Needs:  
 Methodological Issues  
 Seminar  
 Picker Institute, National Conference, Boston, MA
  
- 1996      Designing a Patient Feedback System to Meet Your Needs  
 Seminar Series  
 Picker Institute, Boston, MA
  
- 1999      Listening to Patients: Surveys and Beyond  
 Seminar  
 Picker Institute Seminar, Boston, MA
  
- 2007      Electronic Data Exchange and Interoperability  
 General Medicine Research Faculty Meeting  
 Presenter/Discussant  
 Beth Israel Deaconess Medical Center faculty, fellows, and house staff  
 Division of General Medicine and Primary Care  
 Beth Israel Deaconess Medical Center
  
- 2008      Feedback on the Schweitzer Fellowship Program  
 Presenter/Discussant  
 The Albert Schweitzer Fellowship, National Program Directors Meeting  
 Boston, MA
  
- 2009      OpenNotes Initiative  
 Healthcare Associates Faculty Meeting  
 Co-Presenter/Discussant  
 Beth Israel Deaconess Medical Center faculty, fellows, and house staff  
 Division of General Medicine and Primary Care  
 Beth Israel Deaconess Medical Center

- 2010      The Albert Schweitzer Fellowship: Health Professional Students in  
Community Service  
Healthcare Associates Faculty Meeting  
Presenter/Discussant  
Beth Israel Deaconess Medical Center faculty, fellows, and house staff  
Division of General Medicine and Primary Care  
Beth Israel Deaconess Medical Center
- 2012      Whose Medical Record Is It, Anyway?  
Ethics Support Service Monthly Case Conference  
Presenter/Discussant  
Beth Israel Deaconess Medical Center faculty, fellows, and house staff  
Division of General Medicine and Primary Care  
Beth Israel Deaconess Medical Center
- 2012      Lessons from the OpenNotes Program  
Seminar  
Presenter/Discussant  
Massachusetts General Hospital faculty, fellow, and house staff  
John D. Stoeckle Center for Primary Care Innovation  
Massachusetts General Hospital
- 2013      OpenNotes in Nursing  
Keynote Presentation  
4<sup>th</sup> Annual Joyce C. Clifford Seminar in Nursing  
Beth Israel Deaconess Medical Center
- 2017      OpenNotes: Patients and Clinicians Sharing Fully Transparent Medical  
Records  
HMS faculty, fellows, and house staff  
Ariadne Labs, Brigham and Women's Hospital/Harvard T.H. Chan School  
of Public Health
- 2018      Participatory Medicine: Transparency in Care from the Patient's  
Perspective  
Presenter/Discussant  
New England Healthcare Executive Network
- 2018      OpenNotes Movement  
Presenter/Discussant  
Ash Center for Democratic Governance and Innovation, Harvard Kennedy  
School
- 2019      OpenNotes Update  
Presenter  
General Medicine Research Conference, Beth Israel Deaconess Medical  
Center



## REPORT OF REGIONAL, NATIONAL AND INTERNATIONAL INVITED TEACHING AND PRESENTATIONS

*Those presentations below sponsored by outside entities are so noted and the sponsors are identified*

### **Regional:**

- 1995      Enhancing Value through Clinical Outcomes Measurement:  
Measuring Patient Satisfaction: Choosing the Best Approach  
Invited Lecture  
University of Massachusetts Medical Center, Marlboro, MA
- 2012      Innovative Approaches to Partnering with Patients  
Presenter/Discussant  
The Schwartz Center for Compassionate Healthcare/CRICO  
Boston, MA
- 2013      Engaging Patients Using OpenNotes  
Presenter/Discussant  
New England Nursing Informatics Consortium Annual Symposium  
Waltham, MA  
Honorarium received
- 2014      OpenNotes in Ambulatory Care  
Plenary Speaker  
Rhode Island Chronic Care Sustainability Initiative, Annual Learning  
Collaborative  
Warwick, RI
- 2015      OpenNotes as a New Standard of Care  
Presenter/Discussant  
Vermont Information Technology Leaders Annual Summit  
Burlington, VT
- 2015      Special Meeting: OpenNotes  
Presenter/Discussant  
Care Transformation Collaborative (CTC) of Rhode Island  
Providence, RI
- 2015      Implementing OpenNotes  
Presenter/Discussant  
Annual Learning Collaborative, Care Transformation Collaborative (CTC)  
of Rhode Island  
Providence, RI  
Honorarium received
- 2015      Portals and Open Records  
Presenter/Discussant  
athenahealth, Watertown, MA

- 2017 From OpenNotes to OurNotes  
Presenter/Discussant  
2017 Fall Retreat  
Dartmouth Institute Microsystem Academy  
Hanover, NH
- 2018 OpenNotes: Advancing Patient Safety and Patient Engagement  
Presenter/Discussant  
Hospital Quality Institute (California) and CHPSO  
Webinar
- 2021 The 21<sup>st</sup> Century Cures Act, Open Notes, and Nursing  
Co-Presenter/Discussant  
New England Nursing Informatics Consortium  
Boston, MA (online)
- National:**
- 1994 How to Interpret Your Hospital's Survey Results  
Invited Lecture  
Patient-Centered Care Consortium, United Hospital Fund  
New York City, NY
- 1996 Assuring Quality in the Continuum of Services  
Seminar  
American Association of Homes and Services for the Aging  
Annual Meeting, Philadelphia, PA
- 1998 Improving Design Quality and Consumer Satisfaction by  
Assessing the Built Environment  
Seminar  
Annual Symposium on Healthcare Design, San Francisco, CA
- 2003 The Value of Computerized Order Entry in Ambulatory Settings  
Seminar  
Health Information Management and Systems Society  
Summer Conference, Chicago, IL
- 2003 Modeling the Value of Healthcare Information Technology  
Tutorial  
American Medical Informatics Association, Annual Meeting  
Washington, DC
- 2003 Symposium on Ambulatory Computerized Provider Order Entry  
Seminar  
Health Information and Management Systems Society  
Annual Conference, Orlando, FL
- 2004 The Value of Healthcare Information Exchange and Interoperability

- Seminar  
Association for Advancement of Medical Instrumentation (AAMI)  
Annual National Meeting, Boston, MA
- 2004      Modeling the Impact of Healthcare Information Technologies  
Tutorial  
International Medical Informatics Association, Annual Meeting  
San Francisco, CA
- 2005      Costs and Benefits of Digitizing and Transmitting Health Information  
Invited Lecture  
New York Health Information/Management Systems Society/  
Association of Medical Directors of Information Systems  
Joint Conference, New York City, NY
- 2005      Information Technology: The Agenda in New York State  
Invited Lecture  
Transforming Health Care in New York, United Hospital Fund  
New York, NY
- 2005      Is There a Doctor in the Mouse: Using Information Technology to  
Improve Health Care  
Invited Testimony before Subcommittee on Federal Workforce and  
Agency Organization, U.S. House of Representatives  
Washington, DC
- 2005      A State Model of Health Information Technology Value  
Invited Lecture  
eHealth Initiative Teleconference: Connecting Communities Work Group  
Albany, NY
- 2005      Evaluation in Action: A Case-Based Approach to Evaluating  
Health Information Technology  
Tutorial  
Agency for Healthcare Research and Quality, Grantee Symposium  
Chicago, IL
- 2005      Interoperable Health Information Exchange in New York  
Invited Lecture  
United Hospital Fund, HIT Incentives, Albany, NY
- 2005      Health Information Technology and Information Exchange Networks:  
The State of Play and Potential Models for Sustainability  
Invited Lecturer/Panelist  
Medicare Health Care Quality Demonstration Public Meeting MMA  
Section 646, Washington, DC
- 2006      Examples of the Quality and Business Case for the Electronic  
Transmission of Patient Information

- Invited Lecture  
Utah Health Information Network, Salt Lake City, UT
- 2006 Health Information Technology, Health Information Exchange, and the Future of Health Care – Taking a Hard Look at Potential Costs and Benefits for Colorado  
Keynote Lecture  
Colorado Health Institute, Denver, CO
- 2006 Benefits and Cost of Electronic Data Exchange in Health Care  
Invited Lecture  
Louisiana eHealth Conference, Baton Rouge, LA
- 2007 Patient Computing: Insights from Consumers, Patients, and Health Professionals.  
Workshop Leader  
Project HealthDesign, Vanderbilt Center for Better Health  
Nashville, TN
- 2008 What Patients Want from Health Information Technology  
Presenter/Discussant  
Pioneer Portfolio Group, Robert Wood Johnson Foundation  
Princeton, NJ
- 2009 Opening Medical Records to Patients  
Presenter/Discussant  
General Medicine Research Group  
Harborview Medical Center, Seattle, WA
- 2011 Opening Medical Records to Patients  
Presenter/Discussant  
Institute for Cancer Care Excellence  
MD Anderson Cancer Center, Houston, TX
- 2012 OpenNotes Public Meeting  
Presenter/Discussant  
OpenNotes Stakeholder Meeting, Washington, DC
- 2013 OpenNotes  
Presenter/Discussant  
American Nurses Association, Organizational Affiliates Meeting  
Crystal City, VA
- 2013 Transforming Patients' Engagement with Health Care  
Presenter/Discussant  
Robert Wood Johnson Human Capital Network Webinar  
Live-streamed from Princeton, NJ to a national audience
- 2013 Promising Practices for Providers Implementing Blue Button

- Panelist  
HHS/ONC 2013 Consumer Health IT Summit: Accelerating the Blue Button Movement, Washington, DC
- 2013 Innovation in Patient Engagement and Primary Care  
Panelist  
Harkness Fellowships in Health Care Policy and Practice, Orientation  
The Commonwealth Fund  
New York City, NY  
Honorarium received
- 2013 Fully Transparent Medical Records: Prospects and Problems  
Special Interest Keynote  
IHI National Forum  
Orlando, FL
- 2013 On the Road to Shared Visit Notes: Early Insights from OpenNotes  
Presenter/Discussant  
OCHIN, Oregon Medical Association, and Oregon Health Network:  
eHealth Innovation Symposium  
Portland, OR
- 2014 OpenNotes: Patients and Doctors on the Same Page  
Co-Presenter/Discussant  
Lancaster General Hospital Medical & Dental Staff Meeting  
Lancaster, PA
- 2014 OpenNotes: Toward a New Standard of Care  
Keynote  
American Medical Students Association, Annual Meeting  
New Orleans, LA
- 2014 OpenNotes: Toward a New Standard of Care  
Presenter/Discussant  
American Association of Nurse Executives Annual Meeting & Exposition  
Orlando, FL
- 2014 OpenNotes: Patients and Clinicians on the Same Page  
Co-Presenter/Discussant  
Institute for Patient- and Family-Centered Care, Intensive Training  
Seminar, Cambridge, MA
- 2014 Filling in Transparency: Where are Medical Records Going, and Why?  
Co-Presenter/Discussant  
National Council of Physician and Pharmacist Executives  
BlueCross BlueShield Association  
Chicago, IL
- 2015 OpenNotes: Toward a New Standard of Care  
Presenter/Discussant

- Healthcare Information and Management Systems Society (HIMSS)  
Connected Patient Community webinar  
Live-streamed from Chicago, IL to a national audience
- 2015 OpenNotes: Engaging Patients through Fully Transparent  
Medical Records  
Presenter/Discussant  
Second National Summit on Health Care Price, Cost, and Quality  
Washington, DC
- 2015 OpenNotes and OurNotes  
Presenter/Discussant  
Healthcare Information and Management Systems Society (HIMSS)  
Patient-Generated Health Data Task Force webinar  
Live-streamed from Chicago, IL to a national audience
- 2015 OpenNotes: SHC Strategic Leadership  
Co-Presenter/Discussant  
Stanford Health Care  
Palo Alto, CA
- 2015 Opening Our Notes & Our Data  
Co-Presenter/Discussant  
Nursing Informatics Symposium: Healthcare Information and  
Management Systems Society (HIMSS) 2015 Annual Conference  
Chicago, IL  
Honorarium received
- 2015 Access to Data – Patient Portals, Blue Button, Open Notes  
Co-Presenter/Discussant  
Patient Engagement Symposium: Healthcare Information and  
Management Systems Society (HIMSS) 2015 Annual Conference  
Chicago, IL  
Honorarium received
- 2015 Talking about OpenNotes and Records  
Presenter/Discussant  
Robert Wood Johnson Foundation “First Friday Hangout” Series  
Live-streamed from Boston, MA, national video chat
- 2015 Moving Towards Fully Transparent Medical Records  
Co-Presenter/Discussant  
Innovation Learning Network Webinar  
Live-streamed from Oakland, CA to a national audience
- 2015 OpenNotes National Update  
Presenter/Discussant  
Scottsdale Institute Teleconference  
Live-streamed from Maple Grove, MN to a national audience

- 2016      Opening Online Clinician Notes to Patients: Lessons Learned from Widespread Implementation in Adult and Pediatric Settings  
Invited Co-Presenter/Discussant  
American Organization of Nurse Executives (AONE)  
Fort Worth, TX
- 2016      Engaging and Empowering Consumers  
Roundtable with HHS Secretary Sylvia Mathews Burwell  
Presenter/Discussant  
U.S. Department of Health and Human Services, Washington, DC
- 2016      OpenNotes Pilot at NYC Health & Hospitals  
Co-Presenter/Discussant  
NYC Health & Hospitals, New York City, NY
- 2016      OpenNotes: Update and Future Think  
Presenter/Discussant  
National Council of Physician Executives  
BlueCross BlueShield Association  
Chicago, IL
- 2016      OpenNotes and Patient Engagement  
Presenter/Discussant  
Silverlink Clinical Advisory Board  
Boston, MA
- 2017      Progress with the OpenNotes Initiative  
Presenter/Discussant  
27<sup>th</sup> Summer Institute in Nursing Informatics  
University of Maryland School of Nursing  
Baltimore, MD
- 2018      OurNotes: Promoting Active Patient Engagement Through Patient-Doctor Collaborations on Medical Records  
Co-Presenter/Workshop: Clinical Care Redesign  
Society of General Internal Medicine, annual national meeting  
Denver, CO

**International:**

- 1998      Hearing Patients' Perspectives on Care  
Workshop  
Picker Institute Europe  
London, England
- 1998      Listening to Patients about Their Care  
Plenary Presentation  
Healthcare Management Conference  
Stockholm, Sweden

- 1998 Through the Patient's Eyes  
Plenary Presentation  
Spris Sjukhusdirektorskonferens  
Gothenburg, Sweden
- 2000 Patient Survey Methodologies  
Workshop  
Picker Institute Europe  
Oxford, England
- 2004 The Value of Clinical Information Technology  
Invited Lecture  
Department of Health and Environment, University of Linköping  
Linköping, Sweden
- 2017 Changing the Culture of Care  
Invited Lecture and Panel Discussion  
Canada Health Infoway  
Toronto, Canada
- 2017 Toward a Shared Culture of Health: Enriching and Charting the Patient-  
Clinician Relationship  
Lecturer and core faculty  
Salzburg Global Seminar  
Salzburg, Austria
- 2018 Next Steps in Transparency  
Presenter/Discussant  
German Congress of Health Services Research  
Berlin, Germany

## **REPORT OF CLINICAL ACTIVITIES AND INNOVATIONS**

### **Current Licensure and Certification:**

1977-2019 RN License, Commonwealth of Massachusetts

### **Practice Activities:**

1977-1980 Staff Nurse, Medical Unit and Medical Intensive Care Unit  
Boston City Hospital, 40 hours per week

1980-1982 Head Nurse, Coronary Care and Progressive Care Units  
Boston City Hospital, 40 hours per week

## **REPORT OF EDUCATION OF PATIENTS AND SERVICE TO THE COMMUNITY**

*Those presentations below sponsored by outside entities are so noted and the sponsors are identified*

### **Activities:**



2005-2010 Pianist in annual chamber music concerts raising more than \$200,000 for Outer Cape Health Services in support of the underserved

## REPORT OF SCHOLARSHIP

### Peer-Review Scholarship in Print or Other Media:

#### Research Investigations:

1. Jencks SF, Daley J, Draper D, Thomas N, Lenhart G, **Walker J**. Interpreting hospital mortality data: the role of clinical risk adjustment. *JAMA* 1988; 260(24):3611-3616.
2. Daley J, Jencks S, Draper D, Lenhart G, Thomas N, **Walker J**. Predicting hospital-associated mortality for Medicare patients: a method for patients with stroke, pneumonia, acute myocardial infarction, and congestive heart failure. *JAMA* 1988; 260(24):3617-3624.
3. Cleary PD, Edgman-Levitan S, Roberts M, Moloney TW, McMullen W, **Walker JD**, Delbanco TL. Patients evaluate their hospital care: a national survey. *Health Aff* 1991; 10(4):254-267.
4. Gerteis M, Edgman-Levitan S, **Walker JD**, Stokes DM, Cleary PD, Delbanco TL. What patients really want. *Health Manage Q* 1993 third quarter; 15:2-6.
5. Cleary PD, Edgman-Levitan S, **Walker JD**, Gerteis M, Delbanco TL. Using patient reports to improve medical care: a preliminary report from ten hospitals. *Qual Manag Health Care* 1993; 2(1):31-38.
6. Delbanco TL, Stokes DM, Cleary PD, Edgman-Levitan S, **Walker JD**, Gerteis M, Daley J. Medical patients' assessments of their care during hospitalization: insights for internists. *J Gen Intern Med* 1995; 10(12):679-685.
7. vom Eigen KA, **Walker JD**, Edgman-Levitan S, Cleary PD, Delbanco TL. Carepartner experiences with hospital care. *Med Care* 1999; 37(1):33-38.
8. Fowler E, MacRae S, Stern A, Harrison T, Gerteis M, **Walker J**, Edgman-Levitan S, Ruga W. The built environment as a component of quality of care: understanding and including the patient's perspective. *Jt Comm J Qual Improv* 1999; 25:352-362.
9. vom Eigen KA, **Walker JD**, Edgman-Levitan S, Cleary PD, Delbanco TL. A comparison of carepartner and patient experiences with hospital care. *Fam Syst Health* 2000; 18(2):191-202.

10. Hargraves JL, Wilson IB, Zaslavsky A, James C, **Walker JD**, Rogers G, Cleary PD. Adjusting for patient characteristics when analyzing reports from patients about hospital care. *Med Care* 2001; 39:635-641.
11. Stern A, MacRae S, Harrison T, Fowler E, Gerteis M, **Walker J**, Edgman-Levitan S, Ruga W. Understanding the consumer perspective to improve design quality. *J Archit Plan Res* 2003; 20(1):16-28.
12. **Walker J**, Pan E, Johnston D, Adler-Milstein J, Bates DW, Middleton B. The value of health care information exchange and interoperability. *Health Aff (Millwood)* 2005 Jan-Jun; Suppl Web Exclusives: W5-10-W5-18. *Eighth among Health Affairs' 25 most-read articles of 2005.*
13. Bu D, Pan E, **Walker J**, Adler-Milstein J, Kendrick D, Hook JM, Cusack C, Bates DW, Middleton B. Benefits of information technology-enabled diabetes management. *Diab Care* 2007 May; 30(5):1137-1142.
14. Adler-Milstein J, Bu D, Pan E, **Walker J**, Kendrick D, Hook J, Bates DW, Middleton B. The cost of information technology-enabled diabetes management. *Dis Manag* 2007 Jun; 10(3):115-128.
15. Timpka T, Bang M, Delbanco T, **Walker J**. Information infrastructure for inter-organizational mental health services: an actor network theory analysis of psychiatric rehabilitation. *J Biomed Inform* 2007 Aug; 40(4):429-437.
16. Sprivulis P, **Walker J**, Johnston D, Pan E, Adler-Milstein J, Middleton B, Bates DW. The economic benefits of health information exchange interoperability for Australia. *Aust Health Rev* 2007 Nov; 31(4):531-539.
17. **Walker J**, Ahern DK, Le LX, Delbanco T. Insights for internists: "I want the computer to know who I am." *J Gen Intern Med* 2009 Jun; 24(6):727-732. *Chosen for 2009 Robert Wood Johnson Foundation Year in Research publication.*
18. Delbanco T, **Walker J**, Darer JD, Elmore JG, Feldman HJ, Leveille SG, Ralston JD, Ross SE, Vodicka E, Weber VD. OpenNotes: doctors and patients signing on. *Ann Intern Med* 2010 Jul 20; 153(2):121-125.
19. **Walker J**, Hannibal K, Johnson ML, Davis RB, Forrow L. Health professional students in community service: insights from trainees and their mentors. *J Health Care Poor Underserved* 2010; 21(2010):1292-1303.
20. **Walker J**, Leveille SG, Ngo L, Vodicka E, Darer JD, Dhanireddy S, Elmore JG, Feldman HJ, Lichtenfeld MJ, Oster N, Ralston JD, Ross SE, Delbanco T. Inviting patients to read their doctors' notes: doctors and patients look ahead. *Ann Intern Med* 2011; 155:811-819.

[Editorial]: Feeley TW, Shine KI. Access to the medical record for patients and involved providers: transparency through electronic tools. *Ann Intern Med* 2011; 155:853-854.

21. Leveille SG, **Walker J**, Ralston JD, Ross SE, Elmore JG, Delbanco T. Evaluating the impact of patients' online access to doctors' visit notes: designing and executing the OpenNotes project. *BMC Med Inform Decis Mak* 2012; 12:32.
22. Delbanco T\*, **Walker J\*** [co-first], Bell SK, Darer JD, Elmore JG, Farag N, Feldman HJ, Mejilla R, Ngo L, Ralston JD, Ross SE, Trivedi N, Vodicka E, Leveille SG. Inviting patients to read their doctors' notes: a year's experience and a look ahead. *Ann Intern Med* 2012; 157:461-470. #2 among *Robert Wood Johnson Foundation's Most Influential Research Articles of 2012*.  
  
 [Editorial]: Goldzweig CL. Pushing the envelope of electronic patient portals to engage patients in their care. *Ann Intern Med* 2012; 157:525-526.  
  
 [Commentary]: Meltsner M. A patient's view of OpenNotes. *Ann Intern Med* 2012; 157:523-524.
23. **Walker J**, Delbanco T. Interval examination: moving toward open notes. *J Gen Intern Med* 2013; 28(7):965-969.
24. Vodicka E, Mejilla R, Leveille SG, Ralston JD, Darer JD, Delbanco T, **Walker J**, Elmore JG. Online access to doctors' notes: patients' concerns about privacy. *J Med Internet Res* 2013; 15(9):e208.
25. Dhanireddy S, **Walker J**, Reisch L, Oster N, Delbanco T, Elmore JG. The urban underserved: attitudes toward gaining full access to electronic medical records. *Health Expect* 2014 Oct; 17(5):724-32.
26. Jackson SL, Mejilla R, Darer FD, Oster NV, Ralston JD, Leveille SG, **Walker J**, Delbanco T, Elmore JG. Patients who share transparent visit notes with others: characteristics, risks and benefits. *J Med Internet Res* 2014 Nov 12; 16(11):e24.
27. Oster NV, Jackson SL, Dhanireddy S, Mejilla R, Ralston JD, Leveille S, Delbanco T, **Walker J**, Bell SK, Elmore JG. Patient access to online visit notes: perceptions of doctors and patients at an urban HIV/AIDS clinic. *J Int Assoc Provid AIDS Care* 2015 Jul-Aug; 14(4):306-12.
28. Bell SK, Folcarelli PH, Anselmo MK, Crotty BH,\*\* Flier LA,\*\* **Walker J**. Connecting patients and clinicians: the anticipated effects of open notes on patient safety and quality of care. *Jt Comm J Qual Patient Saf* 2015; 41(8):378-384.
29. Crotty BH,\*\* **Walker J**, Dierks M, Lipsitz L, O'Brien J, Fischer S, Slack WV, Safran C. Information sharing preferences of older patients and their families. *JAMA Int Med* 2015; 175(9):1492-1497.  
  
 [Commentary]: Nath PA, Sharp CD. A user-centered design approach to information sharing for older patients and their families. *JAMA Int Med* 2015; 175(9):1498-1499.

30. Wright EA, Darer JD, Tang X, Thompson J, Tusing LD, Fossa A, Delbanco T, Ngo L, \* **Walker J**\* (co-last). Effect of sharing physician notes on adherence to medications. *J Med Internet Res* 2015; 17(10):e226.
31. Crotty BH,\*\* Anselmo M, Clarke DN, Famiglio LM, Flier L, Green JA, Leveille S, Mejilla R, Stametz RA, Thompson M, **Walker J**, Bell SK. Opening notes to patients: a qualitative study of resident and faculty physician attitudes on OpenNotes implementation in graduate medical education. *Acad Med* 2016; 91:418-426.
32. Leveille SG, Mejilla R, Ngo L, Elmore JG, Darer J, Ralston JD, Delbanco T, **Walker J**. Do patients who access clinical information on patient internet portals have more primary care visits? *Med Care* 2016 Jan; 54(1):17-23.
33. Root J, Oster N, Jackson S, Mejilla R, **Walker J**, Elmore J. Characteristics of patients who report confusion after reading their primary care clinic notes online. *Health Commun* 2016; 31(6):778-781.
34. Esch TE,\*\* Mejilla R, Anselmo M, Podtschaske B, Delbanco T, **Walker J**. Engaging patients through open notes: an evaluation using mixed methods. *BMJ Open* 2016; 6:e010034. doi: 10.1136/bmjopen-2015-010034.
35. Mafi JN,\*\* Mejilla R, Feldman H, Ngo L, Delbanco T, Darer J, Wee C, **Walker J**. Patients learning to read their doctors' notes: the importance of reminders. *J Am Med Inform Assoc* 2016 Sep; 23(5):951-955.
36. **Walker J**, Crotty BH,\*\* O'Brien J, Dierks MM, Lipsitz L, Safran C. Addressing the challenges of aging: how elders and their care partners seek information. *The Gerontologist* 2017; 57(5):955-962, <https://doi.org/10.1093/geront/gnw060>,
37. Peacock S, Reddy A, Leveille SG, **Walker J**, Payne TH, Oster NV, Elmore JG. Patient portals and personal health information online: Perception, access, and use by U.S. adults. *J Am Med Inform Assoc* 2017 Apr 1; 24(e1):e173-e177. Jul 12. pii: ocw095. doi: 10.1093/jamia/ocw095. [Epub ahead of print].
38. Wolff JL, Darer JD, Berger A, Clarke D, Green JA, Stametz RA, Delbanco T, **Walker J**. Inviting patients and care partners to read doctors' notes: OpenNotes and shared access to electronic medical records. *J Am Med Inform Assoc* 2017 Apr 1; 24(e1):e166-e172. 2016 Aug 7. pii: ocw108. doi: 10.1093/jamia/ocw108. [Epub ahead of print].
39. Bell S, Mejilla R, Anselmo M, Darer J, Elmore J, Leveille S, Ngo L, Ralston J, Delbanco T, **Walker J**. When doctors share visit notes with patients: a study of patient and doctor perceptions of documentation errors, safety opportunities, and the patient-doctor relationship. *BMJ Qual Saf* 2017 Apr; 26(4):262-270. Published Online First: 26 May 2016 doi:10.1136/bmjqs-2015-004697.

40. Bell SK, Gerard M, Fossa A, Delbanco T, Folcarelli P, Sands K, Lee BS, **Walker J**. A patient feedback reporting tool for OpenNotes: Implications for patient-clinician safety and quality partnerships. *BMJ Qual Saf* 2017 Apr; 26(4):312-322; 2016 Dec 13. doi: 10.1136/bmjqs-2016-006020. [Epub ahead of print].
41. Anderson M, Jackson S, Oster NV, Peacock S, Chen GY, **Walker J**, Elmore JG. Patients typing their own visit agendas into an electronic medical record: Pilot in a safety-net clinic. *Ann Fam Med* 2017;15(2):158-161.
42. Lee BS, Oster NV, Chen GY, Ding LL, **Walker JD**, Elmore JG. Ophthalmology patients' interest in online access to clinic notes at three US clinics. *Ophthalmic Physiol Opt* 2017 July; 37(4):420-427. 2017 doi: 10.1111/opo.12367.
43. Gerard M, Fossa A, Folcarelli PH, **Walker J**, Bell SK. What patients value about reading visit notes: a qualitative inquiry study of patient experiences with their health information. *J Med Internet Res* 2017; 19(7):e237. doi:10.2196/jmir.7212.
44. Mafi JN,\*\* Gerard M, Chimowitz H, Anselmo M, Delbanco T, **Walker J**. Patients contributing to their doctors' notes: insights from expert interviews. *Ann Intern Med* 14 Nov 2017. doi:10.7326/M17-0583.  
  
[Editorial] Safford MM. A new chapter in patient-centered care: sharing the medical note? *Ann Intern Med* 14 Nov 2017. doi:10.7326/M17-2802
45. DesRoches CM, Bell SK, Dong Z, Elmore J, Fernandez L, Fitzgerald P, Liao JM, Payne TH, Delbanco T,\* **Walker J**.\* (co-senior). Patients managing medications and reading their visit notes: A survey of OpenNotes participants. *Ann Intern Med*, Brief Research Report, 28 May 2019.
46. **Walker J**,\* Leveille S\* (co-first), Bell S, Chimowitz H, Dong Z, Elmore JG, Fernandez L, Fossa A, Gerard M, Fitzgerald P, Harcourt K, Jackson S, Payne TH, Perez J, Shucard H, Stametz R, DesRoches C, Delbanco T. OpenNotes after 7 years: Patient experiences with ongoing access to their clinicians' outpatient visit notes. *J Med Internet Res* 2019;21(5):e13876 doi:10.2196/13876.
47. Chimowitz H, O'Neill S, Leveille S, Welch K, **Walker J**. Sharing psychotherapy notes with patients: Therapists' attitudes and experiences. *Soc Work* 2020;65(2):159-168.
48. O'Neill S, Chimowitz H, Leveille S, **Walker J**. Embracing the new age of transparency: mental health patients reading their psychotherapy notes online, *J Mental Health*, 2019;28(5):527-535. DOI: 10.1080/09638237.2019.1644490.
49. DesRoches C, Leveille S, Bell SK, Dong ZJ, Elmore JG, Fernandez L, Harcourt K, Fitzgerald P, Payne TH, Stametz R, Delbanco T, **Walker J**. The views and experiences of clinicians sharing medical record notes with patients. *JAMA Network Open* 2020; 3(3):e201753. doi:10.1001/jamanetworkopen.2020.1753.

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51. Bell SK, Delbanco T, Elmore JG, Fitzgerald PS, Fossa A, Harcourt K, Leveille SG, Payne TH, Stametz RA, **Walker J**, DesRoches CM. Frequency and types of patient-reported errors in electronic health record ambulatory care notes. *JAMA Network Open* 2020 Jun 3(6):e205867. DOI: 10.1001/jamanetworkopen.2020.5867. *A best paper in clinical research informatics, IMIA Yearbook of Medical Informatics 2021*.
52. Leveille SG, Fitzgerald P, Harcourt K, Dong Z, Bell S, O'Neill S, DesRoches C, Fernandez L, Jackson SL, Klein JW, Stametz R, Delbanco T, **Walker J**. Patients evaluate visit notes written by their clinicians: A mixed methods investigation. *J Gen Intern Med* 2020. DOI: 10.1007/s11606-020-06014-7.
53. Blease CR,\*\* Delbanco T, Torous J, Ponten M, DesRoches CM, Hagglund M,\*\* **Walker J**,\* Kirsch I\* (joint senior). Sharing clinical notes, and placebo and nocebo effects: Can documentation affect patient health? *J Health Psychol* 2020. DOI: 10.1177/1359105320948588.
54. Wright JA, Leveille S, Chimowitz H, Fossa A, Stametz R, Clarke D, **Walker J**. Validation of a brief scale to assess ambulatory patients' perceptions of reading visit notes: A scale development study. *BMJ Open* 2020;10:e034517, doi:10.1136/bmjopen-2019-034517.
55. DesRoches CM, **Walker J**, Delbanco T. Care partners and patient portals—Faulty access, threats to privacy, and ample opportunity. *JAMA Int Med* 2020;180(6).
56. Blease C,\*\* Dong Z, Torous J, **Walker J**, Hägglund M,\*\* DesRoches CM. Association of patients reading clinical notes with perception of medication adherence among persons with serious mental illness [research letter]. *JAMA Netw Open*. 2021 Mar 1;4(3):e212823. doi:10.1001/jamanetworkopen.2021.2823.
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#### Letters to the Editor:

1. Bell SK, Folcarelli PH, **Walker J**. Soliciting patient feedback on visit notes: an educational opportunity [letter to the editor]. *Acad Med* 2016;91(4):451-452.

#### **Professional Educational Materials or Reports:**

1. *Patient-Centered Care News*, nationally distributed newsletter of the Picker-Commonwealth Program for Patient-Centered Care, Beth Israel Hospital, Boston, MA;1992-1993 [Editor].
2. *Through the Patient's Eyes* [videotape], Volume 1 – Inpatient Care. The Picker Institute, Boston, MA. (1995 Telly Award, 1995 Silver Cindy Award). Boston: The Picker Institute; 1995 [Co-Creator/Editor].
3. *Through the Patient's Eyes* [videotape], Volume 2 – Ambulatory Care. The Picker Institute, Boston, MA. Boston: The Picker Institute; 1998 [Co-Creator/Editor].

#### **Abstracts, Poster Presentations and Exhibits Presented at Professional Meetings:**

1. **Walker J**, DesRoches C, Elmore J. Helping the helper: how care partners use and perceive electronic access to patient notes [poster]. Presented at the Society of General Internal Medicine, annual national meeting, Denver, CO; April 2018.
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