



FROM GOOD TO GREAT: IMPROVING ACCESS TO AND USE OF PATIENT VISIT NOTES GRANT APPLICATION INSTRUCTIONS

Deadline: December 17, 2021 (by 1 p.m.)

PREPARATION

Please read these instructions before starting the application submission process.

All applications must be submitted through [NYSHealth's online grantee portal system](#). Remember that some requested information may require collaboration from other departments in your organization.

Helpful tips:

- **Timing Out** – The grantee portal is set to time out after one hour. Please *regularly* save while working.
- **Complete as a Word Document** – It is suggested that you complete the application as a Word document first; then copy and paste into the appropriate online fields. Each section lists a maximum character limit.
- **Online Formatting** – Narrative fields in the online application form are plain text format and do not support any formatting. List any references/footnotes parenthetically in the text.
- **Save and Return** – You do not have to complete the application all at once. You can save your work and return at a later time by logging back on to the grantee portal.

GRANTEE SUPPORT

Interested organizations are encouraged to contact Foundation staff if they have questions about projects. Programmatic questions should be addressed to OpenNotesRFP@NYSHealth.org or Deborah Wachenheim, Assistant Director, Dissemination, OpenNotes, at dwachenh@bidmc.harvard.edu.

If you have questions or difficulties using the grantee portal, please contact Keenen Willis, NYSHealth Grants Assistant, at willis@nyshealth.org or call (212) 584-7675; please leave your telephone number.

GRANTEE PORTAL LOGIN

Returning Users: If you have applied through NYSHealth's online system before, use your existing credentials to log in. Use the credentials you created during your application process to log in (do not create a new account).

- **Forgot Your Password?** Click on "[Can't access your account?](#)" to receive a temporary password.
- **Forgot Your Username?** Please contact NYSHealth Grants Management as listed above.

New Users (first-time applicant): If you are a first-time applicant, create a user registration to log in. Click on "New User" link and follow the instructions.



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ACCESSING THE OPENNOTES APPLICATION

Once logged in, you will see this dashboard. Go to the **Explore Grant Opportunities** tab at the top, select the “From Good to Great: Improving Access to and Use of Patient Visit Notes” Online Application, and click on Create Application button.

The screenshot shows the 'Grantee Dashboard' with tabs for 'Grantee Dashboard', 'Explore Grant Opportunities', and 'Profile'. The 'Requests' section is active, showing 'Open Items' and 'Closed Items'. A search bar is present. Below is a table with one row of data:

Title of Project	Request Number	Program	Priority Area	Status	Submission Date/Time
-	21-13463	Open Notes	Consumer Empowerment	Application Invited	

COMPLETING THE FROM GOOD TO GREAT: IMPROVING ACCESS TO AND USE OF PATIENT VISIT NOTES APPLICATION

I. Organization Information

This section reflects information created during your user registration process.

- Organization Legal Name (pre-populated from your registration information)
- Organization AKA Name (If your organization name is different from your organization’s legal name)
- Employer Identification (EIN) Number
- Address (pre-populated from your registration information)
- Organization Type 1 (select from drop-down menu)
- Organization Type 2 (select from drop-down menu)
- Region
- Website URL
- Organization Information (*Maximum length: 2,000 characters with spaces*):
Description of your hospital, including size; communities and populations served; hospital system affiliation; and proportion of Medicaid, uninsured, and/or dual-eligible populations served.
- Annual Operating Budget: Do not include a \$ sign in this field; only include numbers.
- Year Established
- Number of Employees

Please click on **Save and Next** to go on to the next section.



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II. Contact Information

This section reflects contact information created during your user registration process. Please click on **Save and Next** to go on to the next section. If the primary contact for this grant needs to be updated, click on the fields with the highlighted red bars and edit.

*Please Note: If the contact information you are looking at is not yours, you have logged in as someone else. This is common if you decide to share login credentials. Please **DO NOT** edit the contact details in this section if you are not this person. You must log in under your own credentials and update your contact details there.*

Please click on **Save and Next** to go on to the next section.

III. Application Summary

1. Project Title (*Maximum length: 120 characters with spaces*).
2. Amount Requested (NYSHealth will award grants of \$30,000 per selected hospital. Please reach out to OpenNotesRFP@NYSHealth.org if you would like to apply for more than one location)
3. Start Date
4. End Date

Please click on **Save and Next** to go on to the next section.

IV. Narrative

The following outlines the required sections and lengths for each. Please provide concise responses for questions in each section in the order they are listed.

1. **Implementation Plan** (*4,000 characters with spaces*)

- How many patients do you serve?
- Describe the makeup of your patient population, including any relevant demographic information related to age, race, ethnicity, primary language, insurance status, or other key factors. Describe your hospital's progress to date in implementing open notes.
 - What types of notes are you sharing? Are there any types you are not sharing?
 - Have you taken steps to communicate with providers and staff about open notes? What have you done?
 - Have you done any open notes trainings for providers and staff? If yes, please describe.
 - Have you employed a formal communications strategy to inform patients/care partners about open notes? If yes, please describe.
- Which electronic health record (EHR) platform does your system use? Have you encountered any EHR barriers related to open notes? What percentage of your patient population is registered on the patient portal?



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- Have you solicited patient feedback and input in your open notes implementation process? If yes, please describe.

2. Statement of Need (*Maximum length: 1,500 characters with spaces*)

- Provide a statement of interest and describe executive leadership support for participation in this technical assistance and learning network program. What do you hope to gain from participating in the program?

3. Project Management (*Maximum length: 3,500 characters with spaces*)

- Describe the staff that will comprise the project team. Applicants are required to engage a project team of 3-4 members for participation. Potential roles to consider include: patient experience/engagement leaders, physician leaders, EHR implementation or IT leads, and staff and patient educators. NYSHHealth strongly encourages organizations to include at least one patient partner and/or advisor on their teams.
- Describe any creative patient engagement approaches you have implemented or would be interested in implementing during the technical assistance program.

4. Barriers and Obstacles (*Maximum length: 2,000 characters with spaces*).

Describe any barriers and/or obstacles you expect to encounter in your open notes implementation; applicant responses will help inform the technical assistance provided through this program.

V. Grant Terms and Conditions

1. Download the Grant Terms and Conditions from **the Attachments Tab**. Review the grant terms carefully.
2. Upload a signed copy in the **Attachments Tab**.
3. Fill out the fields in the **Grant Terms and Conditions Tab**. The name, title, and signature date on the Terms and Conditions document must match these fields.

Please click on **Save and Next** to go on to the next section.

VI. Head of Organization Contact Information

Please enter the contact information of the person who leads your organization.

Please click on **Save and Next** to go on to the next section.

VII. Attachments

Upload the following to your application. Referenced NYSHHealth templates are available in the online application.



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Application Supporting Materials

1. Budget (Required)

Download and complete the Budget Template, then upload it here. Please ensure that your budget fits an 8.5 X 11 sheet of paper and full number/dollar amounts are visible in each cell. If a worksheet is “protected,” the password is “nyshf.”

Please list how you anticipate using the grant funds. Funds can be used for a range of costs associated with open notes implementation, including, but not limited to, staff support, training, education, EHR configuration, and/or patient marketing and engagement. NYSHHealth understands spending plans may change and you will have the opportunity to amend if awarded a grant.

2. Charts & Tables (Optional)

This upload field is available to applicants who may have charts and/or tables that are not supported in the online application narrative fields. This attachment is limited to two pages maximum. Please note this upload is not **provided for additional narrative space** and **will not be included** with your application review

Application Due Diligence Materials

1. Grant Terms and Conditions (Required)

Please review, sign, and upload one copy of the grant terms to your online application. **Important:** Ensure that the fields in the **Grant Terms and Conditions Tab** are completed and match the uploaded document.

2. IRS Determination Letter (Required)

If your organization does not have an IRS Determination letter, please upload a document that explains your status.

VIII. Review/Submit

When you have finished entering and saving all the necessary information under the various tabs, click **Review/Submit** at the top. You will then see your application in its entirety.

If you need to make changes or edits, click **Back to Record** and update accordingly. Once you have reviewed all your information and have no other changes, click **Submit**. Select **Print** if you would like a printed copy of your application. You will receive an automated e-mail indicating that you have successfully submitted the application. **If you do not receive this e-mail, please check your spam or junk mail folders.**

Not ready to submit? Click **Back to Record** and **Save**. Log back on to the grantee portal to continue editing at a later time.



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FEEDBACK

We welcome and encourage your comments about your online experience. Please send your feedback to grantsmanagement@nyshealth.org.