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## Bree Collaborative | Shared Decision Making Workgroup

June 28<sup>th</sup>, 2019 | 9:00-10:30

Foundation for Health Care Quality

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### Members Present

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Emily Transue, MD, MHA, Associate Medical Director, Washington State Health Care Authority (Chair)

David Buchholz, MD, Medical Director, Premera

Leah Hole-Marshall,\* JD, General Counsel and Chief Strategist, Washington Health Benefit Exchange

Andrew Kartunen, MPH, Program Director, Growth & Strategy, Virginia Mason Medical System

Dan Kent, MD,\* Medical Director, United Health Care

Dan Lessler,\* MD, MHA, Physician Executive for Community Engagement and Leadership, Comagine Health

Jessica Martinson, MS, Director of Clinical Education and Professional Development, Washington State Medical Association

Karen Merrikin, JD, Consultant, Washington State Health Care Authority

Randal Moseley,\* MD, Medical Director of Quality Confluence Health

Karen Posner, PhD, Research Professor, Laura Cheney Professor in Patient Safety, Department of Anesthesiology & Pain Medicine, University of Washington

Angie Sparks,\* MD, Family Physician and Medical Director Clinical Knowledge Development Kaiser Permanente

Anita Sulaiman,\* Patient Advisor & Consultant, IBEX

### Staff and Members of the Public

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Steve Levy,\* Washington Patient Safety Coalition

Alicia Parris, Bree Collaborative

Sarah Pearson,\* Washington State Health Care Authority

Ginny Weir, MPH, Bree Collaborative

Emily Wittenhagen,\* Washington Patient Safety Coalition

\* By phone/web conference

### CHAIR REPORT AND APPROVAL OF MINUTES

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Emily Transue, MD, MHA, Washington State Health Care Authority, and Ginny Weir, MPH, Bree Collaborative opened the meeting those present introduced themselves.

*Motion:* Approval of 5/24/19 Minutes.

*Outcome:* Unanimously approved with corrections

### DETERMINING NEXT STEPS FOR ADOPTION

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Workgroup viewed *Draft Recommendations Shared Decision Making* and discussed:

- In *Background* under “four priority focus areas” group added documentation and coding to the final bullet
  - Possibly adding language about enhanced liability from informed consent
  - Highlighting benefits from a patient perspective
- Ms. Weir asked the group for feedback on the *Figure X: Appropriateness of Shared Decision Making*
  - Group agreed Figure could possibly misinterpreted as is
    - Should be populated with different/more examples

- Showing as a continuum with evidence for, evidence against, and a band of shared decision making appropriate conditions in the middle
  - Including the key phrase “preference sensitive”
  - Adding a footnote that patient may always decline treatment
  - Adding a graphic of the hallmarks of shared decision making
- Group agreed to add a definition of when shared decision making is appropriate
  - Preference sensitive
  - Strong evidence for multiple treatments
  - Ambiguous evidence for multiple treatments
  - Some amount of uncertainty
  - Including watchful waiting as an option
    - Group won't be able to be comprehensive in all the scenarios where shared decision making can be made
      - Age can effect which medically appropriate treatment options there are
      - A great deal of nuance
- Recommending health care systems to consider where in the work-stream or referral process to implement the decision aid
  - May be appropriate at multiple points
- Group agreed to provide examples but to remain general

**Action Item: Jessica Martinson, MS, Director of Clinical Education and Professional Development Washington State Medical Association and Dan Kent, MD, Medical Director, United Health Care will draft diagram of primary and secondary drivers of adoption of shared decision making**

- Group agreed to include HCA decision aid certification criteria rather than full IPDAS (International Patient Decision Aid Standards) criteria as an appendix
  - Including an link to criteria on HCA website so that up-to-date criteria are accessible as they evolve
  - HCA list is manageable and concise
  - HCA criteria asks about availability of multiple languages and readability

**Action Item: Karen Merrikin, JD, Consultant, Washington State Health Care Authority, will draft language regarding the certification criteria, additionally a description of shared decision making law, key definitions, and documentation requirements**

- Changed sentence from “do not use in lieu of medical advice” to “these recommendations are not intended for use in lieu of medical advice”
- Group considered how to build in inclusion of consumer assisters, advocates, liability carriers or other groups
- How to reference professional and specialty associations, liability carriers
  - Disseminating information to clinicians
  - Funding access to aids
  - Angie Sparks, MD, Family Physician and Medical Director Clinical Knowledge Development Kaiser Permanente, advised state certifications as specialty organizations may be biased toward certain interventions that may be reflected in the aid

- Andrew Kartunen, MPH, Program Director, Growth & Strategy, Virginia Mason Medical System, pointed out it would not be possible for providers to accomplish objectives under *Providers* without system support
  - Group considered ways to combine *Providers* and *Health Systems* while still preserving the different roles

Group considered possible metrics and discussed:

- How workgroup member organizations currently track use of decision aids
  - Dr. Sparks shared that her organization actively measures decision aid use with joint replacement
    - Difficult to measure due to the usage of multiple delivery methods (e.g. mail and online)
    - Do not measure engagement
      - Multiple organizations used to test patients on their knowledge of their condition but discontinued because it was burdensome to patients
  - Tracking decisions being made
    - Complexity of tracking decisions made due to confounding factors (e.g. incentivizing breast cancer screenings) confounding results

**Action Item: Ms. Weir will look into how Medicare tracks use of decision aids where shared decision making is required**

**Action Item: Ms. Merrikin will look into CMS documentation requirements where shared decision making is required**

#### **NEXT STEPS AND PUBLIC COMMENTS**

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Dr. Transue and Ms. Weir asked for final comments and thanked all for attending. The meeting adjourned.