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- Please use the 'Raise Hand' if you wish to speak (click 'Participants' icon, then click 'Raise Hand' at the bottom of the participant list)
- Please use the chat feature to communicate with NQF staff
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# Leveraging Electronic Health Record (EHR) - Sourced Measures to Improve Care Communication and Coordination Option Year

## Web Meeting 1

November 8, 2021

*This project is funded by the Centers for Medicare & Medicaid Services under contract HHSM-500-2017-00060I –75FCMC20F0004– Leveraging EHR Sourced Measures to Improve Care Communication and Coordination*

# Welcoming Remarks

Dana Gelb Safran, President and CEO, National Quality Forum (NQF)

Richard Antonelli, EHR Care Coordination Committee Co-chair

Gerri Lamb, EHR Care Coordination Committee Co-chair



## Agenda



# Introductions and Meeting Objectives

Chelsea Lynch, Director, NQF

## NQF Project Staff

- **Chelsea Lynch**, MPH, MSN, RN, CIC, Director, Quality Innovation
- **Udara Perera**, DrPHc, MPH, Senior Manager, Quality Measurement
- **Monika Harvey**, MBA, PMP, Project Manager, Quality Measurement
- **Victoria Freire**, MPH, CHES, Analyst, Quality Measurement
- **Jesse Pines**, MD, MBA, NQF Consultant
- **Maha Taylor**, MHA, PMP, Managing Director, Quality Measurement



## CMS Staff

- **Kimberly Rawlings**, TO COR, CCSQ, CMS
- **Gequincia Polk**, IDIQ COR, Interim TO COR, CCSQ, CMS

## Meeting Objectives

- Reintroduce the goals of the project Option Year
- Obtain feedback on themes from the Base Year discussions, Environmental Scan Report, and Literature Review
- Discuss recommendations related to how EHRs could better facilitate care communication and care coordination





## Ground Rules

No rank in the room

Participate

Share your experiences

Be respectful

Refrain from political  
comments

Learn from others

# Attendance and Disclosure of Interests

Victoria Freire, Analyst, NQF

## Disclosures of Interest (DOI)

- State your name, title, organization, brief bio, and acknowledge the disclosure(s) you listed in your DOI form if applicable
- Briefly note any of the following disclosures relevant to the project:
  - ▣ Engagement with project sponsors (*Centers for Medicare & Medicaid Services*)
  - ▣ Research funding, consulting/speaking fees, honoraria
  - ▣ Ownership interest
  - ▣ Relationships, activities, affiliations, or roles

*Example: I'm Joan Smith, Chief Medical Officer of ABC Healthcare. I am also a Principal Investigator for a research project examining care coordination and health outcomes funded by XYZ Organization.*

## Roster

- **Richard Antonelli, MD, MS (Co-Chair)**
- **Gerri Lamb, PhD, RN, FAAN (Co-Chair)**
- Kathleen Balestracci, PhD, MSW
- David Burianek
- Brian Buys, RN, MBA
- Sherri Costa, MS, RN, AOCNS
- Cynthia Cullen, MS, MBA, PMP
- Keith Horvath, MD
- David Key
- Joseph Kunisch, PhD, RN-BC, CPHQ
- Russell Leftwich, MD
- Michael Lieberman, MD, MS
- Brent Peery, DMin
- Rebecca Perez, MSN, RN, CCM
- Ann Polich, MD, MPH, MBA
- Walter Rosenberg, MSW, MHSM, LCSW
- Stacie Schilling, MPH
- Suellen Shea, MSN, RN, LSSGB, CPHQ, CPPS
- Colleen Skau, PhD
- Alexis Snyder
- Maurine Stuart
- Jason Wiesner, MD, MBA
- Dorothy Winningham
- Kim Yu, MD, FAAFP
- Andrew Zinkel, MD, MBA

## Federal Liaisons

- **Joel Andress, PhD**, Centers for Medicare & Medicaid Services
- **Tiffany Gillis Brown, JD**, Health Resources and Services Administration
- **Kyle Cobb, MS**, Office of the National Coordinator for Health Information Technology
- **Chris Dymek, EdD**, Agency for Healthcare Research and Quality
- **Tara McMullen, PhD, MPH**, Department of Veterans Affairs
- **Carly Medosch, MBA, PMP**, Centers for Medicare & Medicaid Services
- **Francine Sandrow, MD, MSSM, FAMIA**, Department of Veterans Affairs
- **Kenneth P. Yale, DDS, JD**, Department of Defense

# Overview of Project, Timeline, and Roles and Responsibilities

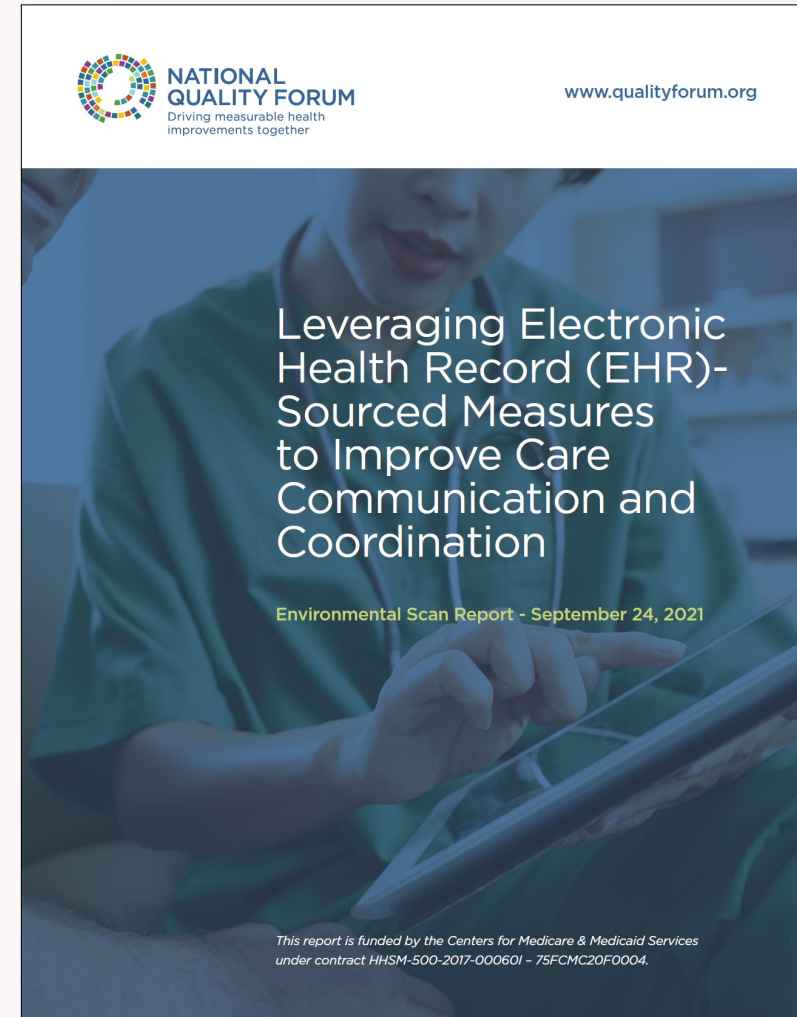
Udara Perera, Senior Manager, NQF

## Project Purpose

- To identify best practices for leverage EHR-sourced measures to improve care communication and care coordination quality measurement in an all-payer, cross-setting, and fully electronic manner
- The Base Year resulted in an environmental scan that describes current practices in use by a variety of stakeholders (e.g., clinicians, organizations, payers, patients, and technology companies) to leverage EHRs to both measure and improve care communication and care coordination
- The Option Year (OY) builds on the foundational work established in the Base Year to develop consensus-based recommendations that facilitate and improve EHR-based care communication and care coordination quality measurement in an all-payer, cross-setting, and fully electronic manner
  - Recommendations will be presented in a Final Recommendations Report

## Environmental Scan Report Topics

- Consensus definitions for care communication and care coordination
- Relationships between care communication and care coordination, EHRs, and improved health outcomes
- Impact on social determinants of health (SDOH) on care communication and care coordination and measurement
- Advantages and challenges of measuring care communication and care coordination in EHRs
- Existing care communication and care coordination measures





## Intent of the Option Year

- Through six, two-hour web meetings, the Committee will develop consensus-based recommendations for:
  - ▣ How EHRs could better facilitate care communication and care coordination
  - ▣ How existing and future development of EHR-sourced measures can be leveraged to improve care communication and care coordination
  - ▣ Addressing SDOH data collection by EHRs as it relates to care communication and care coordination
  - ▣ Possible EHR-sourced measure concepts related to care communication and care coordination (novel or re-specified existing measures)
- Recommendations will be conveyed in a Final Recommendations Report

### Measure Concept

An idea for a measure that includes a description of the measure, including planned focus and target population

### Measure

A fully developed metric that includes detailed specifications and may have undergone scientific testing

## Project Timeline



## Role of Committee Members

- Serve as subject matter experts working with NQF staff to achieve the goals of the project
- Review meeting materials in advance and participate in all meetings
- Work towards meaningful consensus with fellow Committee members
- Review draft deliverables, provide input and offer guidance on recommendations for the final report
- Provide additional feedback and input on deliverables, as needed
- Respond to public comments submitted during the review period

## Providing Input

- **How to provide input during the web meetings?** Provide timely input on major deliverables during facilitated discussion in the Committee meetings by:
  - ▣ Verbally sharing with the Committee
  - ▣ Using the chat box
  
- **How to provide input outside the meetings?**
  - ▣ Submit additional input and feedback related to Committee discussions via email before or after Committee meetings
  - ▣ Provide written comments on draft deliverables during Committee review (May and July 2022)
  - ▣ Participate in offline work (e.g., survey questions, interviews), as applicable

## Role of Committee Co-Chairs

- Facilitate Committee meetings and participate as Committee members;
- Keep the Committee on track to meet project goals without hindering critical discussions and/or input; and
- Assist NQF in anticipating questions and identifying additional information that may be useful to the Committee.

## Role of Federal Liaisons

- Serve as a resource to supplement Committee discussions, providing input on important topics such as federal program details, statutory requirements, practical consideration of data needs, and ongoing challenges confronting federal programs, etc.
- Review and evaluate project deliverables (i.e., factual accuracy of technical descriptions of how quality measures are used in specific federal programs)

## Role of NQF Project Staff

- Work with the Committee to achieve project goals:
  - ❑ Facilitate meetings and conference calls
  - ❑ Ensure communication among all project participants
  - ❑ Facilitate necessary communication and collaboration between different NQF projects and external stakeholders
  - ❑ Respond to NQF member and public queries about the project
  - ❑ Maintain documentation of project activities
  - ❑ Draft and edit reports and project materials
  - ❑ Publish final report

## NQF Members and the Public

- NQF membership and the public can engage in the work by:
  - ▣ Reviewing draft reports and providing feedback to NQF and the Committee (July 2022)
  - ▣ Participating in web meetings during opportunities for public comment



**Comments or Questions?**

# Base Year Themes Overview and Discussion

Chelsea Lynch, Richard Antonelli, and Gerri Lamb



## Themes

Availability of Data  
in EHRs

Sharing EHR Data

Barriers in Using  
and Sharing EHR  
Data

Equity  
Considerations

Need for a  
Single/Overall Care  
Plan

Role of EHR-Based  
Tools

Measurement  
Considerations

Measure  
Endorsement  
Barriers

Need for  
Standardizing  
SDOH Data  
Collection

Considerations for  
Machine-Learning  
Algorithms

## Discussion Questions

- What are the gaps in the base year themes presented?
- Which themes should be refined or expanded?
- Which topics should be prioritized for recommendation development?
- Which themes are overarching and should be considered across all recommendations?
  - ▣ Equity
  - ▣ Patient-centeredness
- What are some recommendations related to the themes?
- What additional topics not currently identified that should be included for recommendation development?

## Availability of Data in EHRs

- How to incorporate data from clinicians, mobile devices, wearables and other sources
- How to capture activities for those who do not document in an EHR
- How to capture community-based activities
- How to identify all team members in the EHR involved in patient care, both healthcare providers and non-healthcare providers
  - For communication/coordination and accountability/attribution
- Standard data set for all care transitions
- Training for how to use the EHR

## Sharing EHR Data

- Lack of interoperability to share and access data (e.g., across different health systems, with independent organizations, etc. and with different EHR vendors)
- Impact of health information exchanges (HIEs), especially for non-hospital settings
- Democratized data
- Integrating with rapid innovation in health information technology (IT)
- Connecting data with social service providers and tracking with the EHR

## Barriers to Using and Sharing EHR Data

- Lack of interoperability
- Lack of standards for structured data
- Use of unstructured data
- Use of inconsistent coding
- Competition in the EHR market

## Equity Considerations

- Advancing equity as a lens for all recommendations
- Provider access to EHRs (e.g., some EHRs are more advanced than others)
- Digital divide/issues related to high-speed internet infrastructure and patient access to technology
- Enabling standardizing SDOH data collection within EHRs
- Availability of SDOH data within EHRs for measure stratification



## Need for a Single/Overall Care Plan

- Example: skilled nursing facilities Comprehensive Minimum Data Set
- Identified care communication and care coordination activities:
  - ▣ Improving patient and caregiver engagement
  - ▣ Developing and implementing care plans including the patient's goals
  - ▣ Enhancing transitions in care
  - ▣ Promoting cross-disciplinary coordination to integrate care
  - ▣ Using closed-loop communication
  - ▣ Deploying risk assessments and stratifications
  - ▣ Participating in case management
  - ▣ Encouraging patients and caregivers to use navigation resources
  - ▣ Using shared decision making
  - ▣ Delivering team-based care

## Role of EHR-Based Tools

- Examples: patient portals, decision support/electronic triggers
- Patient portal considerations:
  - ▣ Must be used and usable
  - ▣ Need alternatives for patients who do not find portals to be feasible or practical

## Measurement Considerations

- Prioritization of specific types of measures (e.g., outcomes, structural, process, utilization)
- How to have measures beyond using a “check-box” to indicate an activity occurred
- How can EHR data be used to improve current measures
  - ▣ More detailed data/more precise specifications
  - ▣ Measure outcomes that are not as directly observable in claims data
  - ▣ Use of EHR-based tools to improve care communication and care coordination
- Measuring patient/family experience from the EHR
- Measuring provider experience from the EHR

## Measure Endorsement Barriers

- Care communication and care coordination processes lack sufficient evidence to link them to clinical outcomes (e.g., readmissions)
- Limited uptake of process measures resulting in limited or no data for analysis to demonstrate usability or feasibility

## Need for Standardizing SDOH Data Collection

- SDOH assessment not routinely part of the medical evaluation
- Data not captured in the EHR as it is not built into the system
- Inconsistent and/or inaccurate language used in unstructured notes
- Identifying responsibility for who should collect, assess, and address the SDOH data
- Collection of race, ethnicity, language, and disability (R/E/L/D) data
- Reimbursement for collecting this data
- Where to store the SDOH data
- Ability to share SDOH data across systems

## Considerations for Machine-Learning Algorithms

- How the algorithms are created
- What data might be missing from the algorithms
- Concern algorithms may amplify disparities by preferentially assessing risk or targeting interventions

# Recommendations Discussion

Udara Perera and Gerri Lamb

## Discussion Questions

- What are the ideal capabilities and capacities an EHR needs to capture, facilitate, and measure care communication and care coordination?
- Which EHR-based tools are important for communicating and coordinating care?



# NQF Member and Public Comment

Victoria Freire

# Next Steps

Victoria Freire

## Next Steps (Cont.)

- Submit any additional input on the base year themes and ideal capabilities and capacities of EHRs via email to the project inbox
- Next web meeting will be held on Thursday, January 13, 2022, from 2:00-4:00pm ET
- Save the date for all web meetings
- Contact the project team with any questions, or if you did not receive any of the meeting invitations
- Project inbox: [EHRCareCoordination@qualityforum.org](mailto:EHRCareCoordination@qualityforum.org)

# THANK YOU.

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