Improving Physician Goals of Care Discussion Documentation for Hematology Oncology Patients in the Outpatient Oncology Clinic

Kathryn Gold, MD
UC San Diego Health, Moores Cancer Center
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Institutional Overview
UC San Diego Health Cancer Services

Moores Cancer Center
Multi-Specialty, Blood & Marrow Transplant Clinics
Infusion Center
Radiation Oncology
Clinical Trials Office - Precision Medicine
Basic Research Laboratories
Patient & Family Support Services

Koman Outpatient Pavilion
Comprehensive Breast Health Center (Imaging, Clinic, Infusion)
Urology Institute

Hillcrest
Multi-Specialty Clinic
Infusion Center

North County
Encinitas/Vista Cancer Services (Clinic, Infusion, Radiation)

Community Partnerships/ Affiliations
Eisenhower Medical Center
Radiation Oncology (3 locations) + Proton Center

TOTAL CLINIC ROOMS: 92
TOTAL INFUSION CHAIRS: 128
TOTAL VAULTS: 5 Linear Accelerators + Brachytherapy
TOTAL INPATIENT BEDS: 108
Patients seen by a Hematology Oncology physician in clinic
- If admitted – primary team is the hospitalist team
- Oncology consult team involved if needed

Issues: Multiple handoffs and patients are often cared for by providers who have not seen them in the outpatient setting
# Team Members

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor</td>
<td>Joseph Califano, MD</td>
<td>Physician in Chief, Moores Cancer Center</td>
</tr>
<tr>
<td>Team Leader</td>
<td>Kathryn Gold, MD</td>
<td>Medical Director, Cancer Quality Thoracic Medical Oncologist</td>
</tr>
<tr>
<td>Team Member</td>
<td>Kira Skavinski, DO</td>
<td>Associate Director, Palliative Care Services Palliative Care Physician</td>
</tr>
<tr>
<td>Team Member</td>
<td>Shelly Kane, MPH</td>
<td>Administrative Director, Cancer Quality</td>
</tr>
<tr>
<td>Team Member</td>
<td>Katherine Coakley, MD</td>
<td>Fellow, Gynecologic Oncology</td>
</tr>
<tr>
<td>QTP Improvement Coach</td>
<td>Ashraf Mohamed, MD</td>
<td>ASCO QTP Improvement Coach</td>
</tr>
</tbody>
</table>
Physician Goals of Care discussions with Hematology Oncology patients starting a new regimen of IV outpatient chemotherapy are poorly documented in the Advance Care Planning (ACP) tab in Epic (5.2%), adversely affecting care coordination at key transitions of care and leading to delay in executing patient care according to their goals of care (GOC) plan.
Cause & Effect Diagram for Poor Documentation of Goals of Care Discussions

- **Technology**
  - ACP tab defaults to RN questions
  - No function to copy GOC note to ACP tab
  - No function to add a smart button for billing

- **Policy**
  - Lack of policy to enforce utilization
  - Conflicting GOC measures

- **Environment**
  - Competing administrative priorities
  - Different providers involved in patient care

- **Process**
  - ACP tab not well integrated into workflow
  - Additional clicks required
  - Must sign note to proceed w/2nd note in same

- **Providers**
  - Additional time/documentation
  - Value of ACP tab not recognized
  - Varying MD comfort with GOC discussion

5.2% Compliance
Reasons for no GOC Documentation in ACP Tab

- Value of ACP tab not recognized
- Additional clicks required
- Additional time/documentation
- ACP tab not well integrated into workflow
- Varying MD comfort with GOC discussion
- ACP tab defaults to RN questions
- Lack of policy to enforce utilization
- Conflicting GOC measures
- Competing administrative priorities
- Must sign note to proceed w/2nd note in same encounter

Defects

Causes

0%
20%
40%
60%
80%
100%

0
5
10
15
20
25
30

Vital Few
Useful Many
Cumulative%
Cut Off %
Aim Statement

By December 2021, 25% of Hematology Oncology patients starting a new regimen of IV outpatient chemotherapy will have physician documented Goals of Care discussions within the Advance Care Planning Tab in Epic within 1 month of treatment start.
### Outcome Measure

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outcome Measure:</strong></td>
<td>% of patients initiating a new chemotherapy regimen with a documented provider goals of care note in the ACP tab within 1 month of treatment start date</td>
</tr>
<tr>
<td><strong>Patient population:</strong></td>
<td>Patients initiating a new chemotherapy regimen, with a Hematology Oncology ordering physician. (Exclusion: patients treated by BMT physicians)</td>
</tr>
</tbody>
</table>
| **Calculation methodology:**              | **Numerator:** patients initiating a new chemotherapy regimen with a documented provider goals of care note in the ACP tab within 1 month of treatment start date  

**Denominator:** All patients starting new regimen of outpatient IV chemotherapy with a Hematology Oncology ordering physician. |
| **Data source:**                          | Electronic Health Record (Epic) Advance Care Planning Tab                                                                                   |
| **Data collection frequency:**            | Baseline data collected one time, for treatment start dates June 14-30, 2021. Post-intervention data collected monthly.                       |
Baseline Data

Outcome Measure: Baseline Data Summary

7 out of 128 patients (5.2%) had a physician-documented GOC note in the ACP tab within 30 days following their IV chemotherapy new regimen start date.
### Process Measure #1: Physician Education

<table>
<thead>
<tr>
<th>Item</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Process Measure:</td>
<td>% of oncology physicians who received education for GOC discussion documentation</td>
</tr>
<tr>
<td>Population:</td>
<td>Physicians in the Division of Hematology/Oncology who see patients in clinic</td>
</tr>
<tr>
<td>Calculation methodology:</td>
<td>Numerator: Physicians who have received education for GOC discussions Denominator: Total number of physicians</td>
</tr>
<tr>
<td>Data source:</td>
<td>Attendance logs from meetings where GOC was presented</td>
</tr>
<tr>
<td>Data collection frequency:</td>
<td>Approximately monthly, following each meeting where this topic is presented</td>
</tr>
</tbody>
</table>

**Measure performance**

- 85% (29/34) of physicians received a formal demonstration and training in a meeting setting

*Expected performance of 100% by end of December 2021.*
### Process Measure 2: SmartPhrase Utilization

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Measure:</td>
<td># of Oncology physicians who have used the SmartPhrase out of total eligible MDs.</td>
</tr>
<tr>
<td>Population:</td>
<td>Physicians in the Division of Hematology/Oncology who see patients in clinic</td>
</tr>
<tr>
<td>Calculation methodology:</td>
<td>Numerator: Physicians who have used the SmartPhrase</td>
</tr>
<tr>
<td></td>
<td>Denominator: Total number of physicians</td>
</tr>
<tr>
<td>Data source:</td>
<td>Epic Utilization Report</td>
</tr>
<tr>
<td>Data collection frequency:</td>
<td>Monthly</td>
</tr>
</tbody>
</table>

**Measure performance**
- 50% (17/34) of physicians have used the Physician goals of care SmartPhrase
## Process Measure #3: Performance Reporting

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Process Measure:</td>
<td>% of oncology physicians who receives quarterly feedback about their compliance with GOC documentation</td>
</tr>
<tr>
<td>Patient population:</td>
<td>Physicians in the Division of Hematology/Oncology who see patients in clinic</td>
</tr>
<tr>
<td>Calculation methodology:</td>
<td>Numerator: Physicians who have received at least a quarterly communication (email or meeting) with their individual performance. Denominator: Total number of physicians</td>
</tr>
<tr>
<td>Data source:</td>
<td>Communication log that documents performance report recipients</td>
</tr>
<tr>
<td>Data collection frequency:</td>
<td>Monthly</td>
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</tbody>
</table>

**Measure Performance**
- 100% (34/34) of physicians received performance data as of 12/7/2021
**Prioritized List of Changes**

<table>
<thead>
<tr>
<th>High Impact</th>
<th>Easy</th>
<th>Difficult</th>
</tr>
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<tbody>
<tr>
<td>• Communicate value and ease of GOC documentation in ACP tab at MD meetings</td>
<td>• Create MD GOC SmartPhrase and tip sheet</td>
<td></td>
</tr>
<tr>
<td>• Encourage utilization via incentivized MD goals and data reporting</td>
<td>[\text{Low Impact}]</td>
<td>• Implement solution to prevent MD from double documentation in visit note and ACP tab</td>
</tr>
<tr>
<td>• Populate MD-specific goals of care template in ACP tab for all MDs.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date of PDSA Cycle</td>
<td>Description of Intervention</td>
<td>Results</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>5/1/21 – 5/21/21</td>
<td>Create, Implement, Communicate re: GOC SmartPhrase and tip sheet creation</td>
<td>100% (34/34) Template created, with tip sheet; introduced at leadership meeting and via cancer center-wide email</td>
</tr>
<tr>
<td>8/9/2021</td>
<td>Selection of financially incentivized Cancer Center goal for increasing MD GOC documentation</td>
<td>Goal selected and communicated</td>
</tr>
<tr>
<td>9/12/21 – 11/18/21</td>
<td>Provider Education with documentation demo at individual disease team meetings</td>
<td>85% (29/34) Documentation workflow demonstrated, billing clarified.</td>
</tr>
<tr>
<td>10/14/2021</td>
<td>Updated ACP tab default content for all MD's to show MD-specific goals of care template</td>
<td>100% (34/34)</td>
</tr>
<tr>
<td>12/7/21</td>
<td>Initiated monthly Performance Reporting</td>
<td>100% (34/34) Individual physicians receive monthly summary of their utilization of the GOC SmartPhrase</td>
</tr>
</tbody>
</table>
With their permission, I had a discussion with @NAME@ today regarding their disease, ***. Additional people present at the time of discussion: ***.

The goal of treatment is {curative, non-curative, other:***}. Anticipated cancer trajectory shared with the patient: ***.

Patient’s Health Care Agent: ***@HEALTHCAREAGENTS@

Total time spent face to face with patient and/or surrogate in Advance Care Planning: *** min.

+ instructions for time-based billing of GOC discussions
% of patients initiating a new chemotherapy regimen with a documented provider goals of care note in the ACP tab within 1 month of treatment start date.
Early Successes

- IT engagement and structure supported efficient SmartPhrase creation
- Engaged billing team to provide education on billing codes/workflows, and for clarification on allowable practices
- Engaged hospitalists and Inpatient Palliative Care teams for feedback on proposed change
- Engaged early physician adopters for feedback
Conclusions

• Aim of 25% GOC documentation by December 2021
  ▪ Baseline performance: 5.2%
  ▪ September – November performance: 8.2%

• Did not achieve aim of 25%, but there has been significant impact on process measures, showing positive progress on the project overall
  ▪ Physician Education
  ▪ Physician Utilization of SmartPhrase
  ▪ Performance Reporting
Next Steps/Plan for Sustainability

• Continued performance feedback and individual outreach to understand barriers and opportunities to documentation
AIM: By December 2021, 25% of Hematology Oncology patients starting a new regimen of IV outpatient chemotherapy will have provider (physician/APP) documented Goals of Care discussions within the Advance Care Planning Tab in Epic within 1 month of treatment start.

TEAM:
- Kathryn Gold, MD
- Kira Skavinski, DO
- Shelly Kane, MPH
- Katherine Coakley, MD

INTERVENTION:
- Create and implement a goals of care (GOC) smartphrase and tip sheet for Outpatient Oncology MDs
- Designate a financially incentivized Cancer Center goal for MD GOC documentation
- Complete physician education at team meetings, including an Epic demo and billing guidelines
- Update the default content in the Epic Advance Care Planning tab to show MD-specific GOC template
- Initiate monthly performance reporting to provide individual physicians with their utilization data

RESULTS:
- Baseline GOC documentation was 5.2%. Aim was set at 25% by December 2021.
- Weekly data showed increases up to 15% documentation.
- Process measures showed significant impact and overall project progress.
- Anticipate meeting goal in CY2022.

CONCLUSIONS:
- Baseline GOC documentation was 5.2%. Aim was set at 25% by December 2021.
- Weekly data showed increases up to 15% documentation.
- Process measures showed significant impact and overall project progress.
- Anticipate meeting goal in CY2022.

NEXT STEPS:
- Continued performance reporting and individual MD feedback will support ongoing tests of change and optimization