

## **OPTN Transplant Coordinators Committee**

### **Meeting Summary**

**June 20, 2024**

**Conference Call**

**Stacy McKean, RN, BSN, MHA, CCTC, Chair**  
**Christine Brenner, RN, BSN, CPTC, CCTC, Vice Chair**

### **Introduction**

The OPTN Transplant Coordinators Committee (the Committee) met via Cisco Webex teleconference on 06/20/2024 to discuss the following agenda items:

1. Policy Operationalization Checklist Project
2. Closing Remarks

The following is a summary of the Committee's discussions.

### **1. Policy Operationalization Checklist Project**

The Committee continued their work developing and refining questions for the policy operationalization checklist project.

#### Summary of presentation:

The Committee reviewed the following questions and feedback submitted prior to the meeting:

#### Resources

- Programs and OPOs:
  - Questions to assess whether additional staff will be needed
  - What additional requirements will the policy change require for evaluations or re-evaluations?
- OPTN resources:
  - What tools are needed to understand policy requirements?
  - What are the tools that will be made available to assist in policy implementation?

#### Programming/IT changes

- Are the new data elements clear discrete fields (i.e., date, value, Yes/No) without the possibility of individual member interpretation that could lead to issues of subjective data and problems with auditing and need for subsequent revision?
- Do the new data elements to be collected align with current EMR documentation practices or will members need to update EMR to capture this data?
- Does the current API form uploading to Unet support the data elements and if not, what is the anticipated time to manually input the new data fields?
- If there are changes needed to member EMR and vendor API interfaces, are there any anticipated build or training costs associated with the new policy?

Summary of discussion:

The Committee agreed on the following topics for the checklist:

- Compliance
- Programming/IT changes
- Process changes
- Resources

The Committee also agreed that the above questions are sufficient as they relate to the Programming/IT changes and recommended that additional questions be added under Resources that pertain to implementation vs. ongoing needs.

One member proposed splitting the question relating to resources into two, asking about what resources are needed for implementation, and what resources are needed for ongoing maintenance of the policy. Other members agreed with this assessment.

A member asked how this checklist/work product will be used, looking for clarity on the projects path. They were informed that this checklist would be incorporated into the policy development process, other Committees would review these questions when developing policy to ensure implementation is smooth and consistent.

That member offered that an added question to ask would be “what is the future auditing potential of this policy” or “will this policy be eventually audited.” Other members agreed that knowing this up front could be helpful. A member pointed out a potential issue with standard policy language. While policies often state that documentation is needed to show compliance, they are not always clear about what specific documentation is required. They raised concerns about two issues. First, the required documentation can vary depending on the specific policy. Second, when OPTN Contractor site surveyors inspect facilities, their interpretation of the policy might differ from how the programs understood it.

It was suggested to have more information on the specifics of how compliance will be monitored and how audits will be conducted, something beyond standard language related to documentation. Members advised involving the community in defining compliance criteria. This would help ensure that site surveyors and programs have a shared understanding of what constitutes compliance.

A member recommended that for IT changes and programming expectations, the policies need to be as discrete as possible. The goal should be to ease the data burden, therefore the data requested needs to also be reportable later. They highlighted that having the infrastructure for a policy is what can ease the operationalization of it.

The Vice Chair made a suggestion about learning from past successes. They proposed examining previous policies that were well-implemented, such as some Living Donor policies. The goal would be to identify what worked well and what did not. These insights could then be applied to improve future policies.

Members agreed with this along with the other points brought up all add to the successful implementation of policy.

Next steps:

The Committee will continue this discussion during future meetings, designing and refining questions as they pertain to successful policy operationalizations and implementations.

## **2. Closing Remarks**

The Committee said goodbye to members rolling off this cycle and were also reminded of upcoming important dates such as: New Member Orientation during the next Committee meeting, the beginning of the Summer Public Comment cycle on July 31<sup>st</sup>, and the upcoming Committee in-person meeting on September 5<sup>th</sup>. Members were reminded to book travel.

### **Upcoming Meetings**

- July 18<sup>th</sup>, 2024
- August 15<sup>th</sup>, 2024
- September 5<sup>th</sup>, 2024 (in-person)

## Attendance

- **Committee Members**
  - Amy Olsen
  - Ashley Cardenas
  - Brandy Baldwin
  - Eve Cabatan
  - Gertrude Okelezo
  - Heather Bastardi
  - Katherine Meneses
  - Kati Robinson
  - Kelsey McCauley
  - Stewart Jusim
  - Christine Brenner
  - Karl Neumann
- **UNOS Staff**
  - Cole Fox
  - Stryker-Ann Vosteen