

AGENCY FOR HEALTHCARE RESEARCH AND QUALITY

National Center for Excellence in Primary Care Research Presents Innovative Use of Technology in Primary Care Delivery

September 14, 2023

Presented by:

Anjana Estelle Sharma, MD, MAS Adrian Aguilera, PhD Ryan J Coller, MD, MPH Nicole Werner, PhD

Moderated by:

Edwin Lomotan, MD AHRQ

NCEPCR Webinar Series



The views expressed in this webinar do not represent official views of the U.S. Department of Health and Human Services or the Agency for Healthcare Research and Quality.







Matthew Simpson, MD

Physician, Division of Practice Improvement, Center for Evidence and Practice Improvement AHRQ

One Hundred Sixth Congress of the United States of America

AT THE FIRST SESSION

Begun and held at the City of Washington on Wednesday, the sixth day of January, one thousand nine hundred and ninety-nine

An Act

To amend title IX of the Public Health Service Act to revise and extend the Agency for Healthcare Policy and Research.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,

SECTION 1. SHORT TITLE.

This Act may be cited as the "Healthcare Research and Quality Act of 1999".

SEC. 2. AMENDMENT TO THE PUBLIC HEALTH SERVICE ACT.

(a) IN GENERAL.—Title IX of the Public Health Service Act (42 U.S.C. 299 et seq.) is amended to read as follows:

"TITLE IX—AGENCY FOR HEALTHCARE RESEARCH AND QUALITY

"PART A-ESTABLISHMENT AND GENERAL DUTIES



"(1) IN GENERAL.—There is established within the Agency a Center for Primary Care Research (referred to in this subsection as the 'Center') that shall serve as the principal source of funding for primary care practice research in the Department of Health and Human Services. For purposes of this paragraph,

primary care research focuses on the first contact when illness or health concerns arise, the diagnosis, treatment or referral to specialty care, preventive care, and the relationship between the clinician and the patient in the context of the family and community.

"(2) RESEARCH.—In carrying out this section, the Center shall conduct and support research concerning—

"(A) the nature and characteristics of primary care practice;

"(B) the management of commonly occurring clinical problems;

"(C) the management of undifferentiated clinical problems; and

"(D) the continuity and coordination of health services.



NATIONAL CENTER FOR EXCELLENCE IN PRIMARY CARE RESEARCH



Working to:

- Develop a more coordinated primary care research portfolio & agenda
- Create more targeted primary care research funding opportunities
- Support & expand a diverse primary care research workforce
- Build a more robust & systematic dissemination strategy

NCEPCR Webinar Series



Strengthening Primary Care Research Webinar Series

Innovative Use of Technology in Primary Care Delivery

Today's Webinar Objectives



Innovative Use of Technology in Primary Care Delivery

1. Introduce examples of AHRQ-funded grants that research the use of innovative technology in primary care delivery

2. Describe how the use of technology in primary care delivery advances AHRQ's mission (to make healthcare safer, higher quality, more accessible, equitable, and affordable)

Moderator





Edwin Lomotan, MD

Senior Advisor for Clinical Informatics, Center for Evidence and Practice Improvement AHRQ

Today's Webinar Presenters



- Anjana Estelle Sharma, MD, MAS (University of California, San Francisco, School of Medicine), ExPERTS-PC: Engaging Patients in Event Reporting for Safety in Primary Care
- Adrian Aguilera, PhD (University of California, Berkeley, School of Social Welfare; and University of California, San Francisco), Improving Diabetes and Depression Self-management Via Adaptive Mobile Messaging
- Ryan J Coller, MD, MPH (University of Wisconsin, Madison; School of Medicine and Public Health) and Nicole E. Werner, PhD (Indiana University School of Public Health-Bloomington), Improving Medication Safety for Medically Complex Children with mHealth Across Caregiving Networks

Presentation 1



ExPERTS-PC: Engaging Patients in Event ReporTing for Safety in Primary Care Development of a mobile safety event reporting tool



Anjana Sharma, MD, MAS Department of Family & Community Medicine, University of California, San Francisco

Background



- Ambulatory adverse events cause significant morbidity and mortality
 - ► 5% of US adult outpatients may have experienced a diagnostic error annually
 - 4.5 million ambulatory care visits annually in US may have been related to an adverse drug event.
- Primary care patients and caregivers are drivers of safe outpatient care, but are not usually involved in safety solutions
- We sought to involve patients and stakeholders in a patient-safety reporting tool in this K08

Technology Being Studied



- Text-messaging has shown promise in patient safety work
- Benefits: easy, accessible, high cell phone uptake even in lowincome populations
- Precedent work has found text-message safety reporting to be feasible in the inpatient pediatric setting [Bardach et al, J Hosp Med 2022]

Stakeholder Advisory Research Council: 2019-2023





Iterative, User-Centered Design Process





Process maps, focus groups and interviews (pre-K08): Need for more communication regarding potential safety concerns

Iterative, User-Centered Design Process





Phase 1: 10 primary care patients trialed the initial "FIQS" tool and provided usability interviews

Inclusion criteria: SF Public Health Network, patients, age 18+, Englishspeaking, own smartphone, experience with insulin, opioids, blood thinners

Text-messaging mobile reporting tool



Text message ask anything to share (`		by study team and triaged to primary care
Hello Hello	Choose the category that best fits your experience.	Delly Sefety Survey
At San Francisco	Medications, Infusions, Food, or > Formula	Daily Safety Survey
General Hospital, we	Hospital Room and Equipment >	WHAT WENT WELL
care about safety. Have you experienced safety	Q Communication >	In your words, please tells us your story:
issues today (Friday, April 16, 2021)? If yes:	Infection Prevention >	
click the link below. If	IVs, Procedures, or Tests >	
no, text N.	(?) Other >	When did it happen?
https://ggen.run/ y2r08c	₩hat Went Well >	 Afternoon (1pm-7pm) Evening (7pm-1am) Night (1am-7am)
O (Mensaje de texto		< Next

Development of Our Tool



Phase 1 Testing

Participant Characteristics (n=10)

Participant characteristics	N (%)
Gender Female Male	6 (60%) 4 (40%)
Age 18-30 31-45 46-60 61-70	1 (10%) 3 (30%) 3 (30%) 3 (30%)
Race/ethnicity African American Hispanic/Latinx American Indian White Asian	5 (50%) 2 (20%) 1 (10%) 1 (10%) 1 (10%)

Reports Submitted by Category (n=16)

Category	N=16 (%)
Other	6 (37.5%)
Communication	4 (25%)
Hospital Room and Equipment	2 (12.5%)
What Went Well	2 (12.5%)
Infection Prevention	1 (6.25%)
IVs, Procedures, or Tests	1 (6.25%)

Two reports of chest pain! --> Phase 1 halted

Usability Themes



Themes	Examples
Ease of Use	 simple/user friendly Non-repetitive Feels like someone is "looking out for me" and "Cared for" Really like the "N" and "Y" because so short Prefer not talking to someone on phone Can stay home in COVID
Barriers to Use	 too much going on immigrants/undocumented may feel less comfortable Confusion about reporting symptoms vs reporting SAFETY No follow up leads to lack of knowledge of where info is going
Why used for emergency?	 Felt alone, no other options for how to communicate Because it's in text, feels more accessible Didn't consider it an acute emergency, more of chronic Didn't understand Wanted quick response Felt ppl on other side cared
Ideas for improvement	 Significant changes to orientation protocol Multiple stopgaps to ensure not emergency Wording, color, display suggestions

Iterative, User-Centered Design Process





We reviewed the Phase 1 results with SARC and modified the tool based on the findings and recommendations.



At UCSF Benioff Children's Hospital, we care about safety. Have you experienced safety issues today? If yes: click the link below. If no, text N.

dev.studydata.net

FIQS2 TOOL



At UCSF/ZSFG, we care about your safety. Have you experienced any medical safety issues today? If yes, please click the link below. If no, please text N. https://www.studydata.net/qgen/ MSurvey.php? key=275c809e2b%3Aexpc%3Ab58d f446fa8d4dc6c7ee36&qri=584f389c d4fd3bcdf3c7ecec349e68e7

EXPERTS-PC TOOL





Choose the category that best fits your experience.





ZUCKERBERG SAN FRANCISCO GENERAL Hospital and Trauma Center

Choose the category that best fits your experience.



Medication/Pharmacy >

- Communication/Respectful Care >
 - Diagnosis, Procedures, or Tests >
- S Delay/Timing of Care >

Other >

What Went Well >





EXPERTS-PC TOOL



Iterative, User-Centered Design Process





Phase 2 Testing: Went back to our stakeholder advisory council and asked them to trial the updated tool, now called EXPERTS-PC

Phase 2 Testing



e-Health Literacy Questionnaire Scores

(n=9, 5 patients/caregivers + 4 providers)

Role	Mean	Sum of SDs
Patient	6.4	3.383
Provider/Healthcare staff	7.4	3.766

System Usability Score of EXPERTS-PC

(n=6, 5 patients/caregivers + 1 provider)

Median	72.5
Mean	75
SD	10.36822

System Usability Score



Changes in Phase 3



Daily Safety Survey



Today is: 06/08/23

Attention

This tool is for non-urgent medical issues.

If you need immediate medical attention, please call your doctor's office or 911.

Examples of emergency symptoms that are not for this tool here

Submissions are reviewed every 24 - 72 hours.

Report submitted. Thank You

If you would like to submit another report, then please hit "Next". Otherwise, you can close this window.

Changes included:

- 1. adding link to emergency situations
- 2. streamlined navigation/loop for multiple reports

Next >

Iterative, User-Centered Design Process





Phase 3 Testing: We made additional modifications, and then rolled out Phase 3 testing with a new cohort of adult outpatients



- Phase 3 Testing to-date
- Total enrolled = 8 patients, 1 caregiver to-date, goal N=30
- Total reports to-date: 17

Patient characteristics	N (%)
Gender Female Male	4 (44%) 5 (56%)
Age 18-30 31-45 46-60 61-70	1 (11%) 2(22%) 3 (33%) 3 (33%)

Benefits and Challenges



- Very rich engagement from stakeholder advisors
- Public health site serving lowincome, racially diverse population
- Remote enrollment and participation - allows more diverse population to participate in study

- Significant delays due to COVID, IRB, and staffing transitions
- Thoughtful work takes time!
- Patients desire more follow-up than this tool can provide
- Getting more difficult to recruit over the phone



Future Integration into Primary Care



Tailored application for higher-risk populations (eg, hospital discharge)

Embedding into existing systems

Smart, safe use of chatbots/AI?

Thank you



Our wonderful SARC Members

UCSF Study Staff: Amber Tran, Adriana Najmabadi, Hiba Elkhatib, Beatrice Huang

K08 Mentors Urmimala Sarkar and Naomi Bardach

Funded by AHRQ K08HS028477

Contact: Anjana.sharma@ucsf.edu Send Card



Scan or click to preview

Presentation 2



Improving Diabetes and Depression Self-management Via Adaptive Mobile Messaging



Adrian Aguilera, PhD University of California, Berkeley, School of Social Welfare; and University of California, San Francisco

Acknowledgement



Co-PI: Courtney Lyles, PhD

Center for Healthcare Policy and

Research, University of California, Davis



DIAMANTE

DIAbetes & Mental Health Adaptive Notifications TExting Study

- Interventions for Depression and Diabetes are siloed
- Physical activity is a core mechanism for both
- Mobile health interventions need to be:
 - Personalized
 - Integrated into care
 - Developed with vulnerable populations

DIAMANTE Reinforcement Learning Intervention



- Primary Project Aim is to increase physical activity via:
 - Smartphone Passive Sensing of steps
 - Personalized messaging using a reinforcement learning algorithm
 - Target individual's specific motivators

DIAMANTE App



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*	DIAMAN	TE: This We	ek 🗖
20000			 Daily Goal Daily Steps
16000			
12000	11294		
8000		6714 6808	80
4000			4292 3008 30
0 2019	Feb 16, 2019	Feb 18, 2019	Feb 20, 2019
Frida	y: February 22,	2019	3008 Steps
Thur	sday: February	21, 2019	4292 Steps
Wednesday: February 20, 2019		6808 Steps	
Tues	day: February 1	9, 2019	6714 Steps
Monday: February 18, 2019		11293 Steps	
Sunday: February 17, 2019		10149 Steps	
Saturday: February 16, 2019		6719 Steps	
Friday: February 15, 2019		14905 Steps	
Thursday: February 14, 2019		20513 Steps	
Wed	nesday: Februa	ry 13, 2019	10015 Steps
Tues	Tuesday: Febr <u>uary 12, 2019</u>		12306 Steps



COM-B Behavioral Change Wheel



COM-B Behavioural Change Wheel

(2011) Michie, Stranlen and West






Reinforcement Learning





Important Terms



Action variable: Actions to be taken by algorithm (Feedback, Message, Time)



<u>Contextual variables</u>: A participant's state (characteristics, behavior, surroundings)



Reward: Outcome

<u>Model:</u> How we predict what the potential reward might be, as a function of the action and contextual variables.



Every morning, algorithm is re-trained on data of all participants



Actions predicted not to be the best ones will still be tested (Boltzmann/ Thompson Sampling)

Methods



- Participants & Setting
 - Low-income patients from primary care clinic at public hospital
 - English or Spanish speakers
 - Diabetes diagnosis and depression symptoms
 - Varying digital literacy levels
 - 1 year design phase
- COVID-19 & Recruitment issues
 - Social Media (Craigslist, Facebook, Google Ads)
 - Half of sample
- Sent step and PHQ-9 data to PCP via EHR messages

DIAMANTE Trial Design





	Adaptive	Random	Control
Download the app	Х	X	x
Weekly mood message	Х	x	x
Daily health promotion message. Non adaptive.		х	
 Reinforcement learning to adapt and optimize text messaging: feedback step count/goal motivational 	x		

Participants



	Adaptive	Random	Control
N	59	55	59
Age (years), mean (SD)	47.5 (12.0)	48.6 (11.1)	50.12 (52)
Female %	54%	67%	61%
Spanish lang Intervention %	22%	22%	29%
Race/ethnicity %			
Asian or Pacific Islander	9%	7%	7%
Black or African American	14%	16%	19%
White	34%	29%	24%
Latine/x	37%	36%	41%

Participants



	Adaptive	Random	Control
N	59	55	59
Education, %			
No formal edu to 8 th grade	7%	7%	12%
H.S. Grad, GED, or some H.S	27%	24%	20%
Some college	32%	31%	15%
College graduate	25%	27%	40%
Graduate degree	9%	9%	12%
Employment Status, %			
Full Time (>35 hrs/wk)	39%	35%	34%
Part Time	12%	25%	15%
Unemployed	19%	16%	15%
Disability	17%	11%	12%

Physical Activity



5,000.00 4,000.00 Steps 3,000.00 2,000.00 1,000.00 0.00 Adaptive Random Control

Pre-intervention Steps Average

Linear Mixed Model





Implications



- Text messaging and low-burden digital tools can be used to promote behavior change among vulnerable populations
- Personalized and Adaptive digital health interventions may be most effective at increasing physical activity than general digital health tools
- Need to work on integration into care and EHR for improved implementation

Presentation 3



Improving Medication Safety for Medically Complex Children with mHealth Across Caregiving Networks



Ryan J Coller, MD, MPH University of Wisconsin, Madison, School of Medicine and Public Health



Nicole E. Werner, PhD Indiana University School of Public Health-Bloomington

Medication Safety in Pediatrics



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- More than half of US children take \geq 1 med / week
 - ► >20% dose deviation by ~half of caregivers
 - ► >40% dose deviation by ~quarter of caregivers
- >90% of 300K annual med errors reported to US poison control centers occur at home
 - Every 8 minutes, a child experiences a medication error during routine care at home

Medical Complexity = Unique Vulnerability



- Extreme polypharmacy, medical fragility, complex regimens
 - Median 8 medications + PRNs in our cohort
 - Variable timing, formulations, routes
 - Weight-based dosing, liquid concentration
 - Narrow therapeutic windows
 - Drug-drug interactions
- 5x higher odds of an adverse drug event (ADE) leading to an ED visit than other children
 - ► > 1 in 50 CMC ED visits are associated with ADE
 - > 1 in 3 CMC ED ADE visits result in hospital admission





Modifiable Root Causes





AHRR Agency for Health

MRCI = *Medication Regimen Complexity Index* – *a weighted measure of formulation, frequency, and special instructions*

Modifiable Root Causes





Key Knowledge Gaps





Key Knowledge Gaps



- Despite the high risk and complex nature of CMC medication management, no tools...
 - ...are designed to <u>support CMC caregivers'</u> <u>medication administration accuracy</u>
 - support management across the network of other people involved in daily care

Prototypes - Caregiver Perceptions



 It's a one-stop...one area where they can have all this information...and that can make life simpler and cut down on human errors –between caregivers and spouses





Preliminary mHealth data



@HOME is a <u>usable</u> platform, and longitudinal use is <u>feasible</u>

Hospital Pedi	atrics	Со	ntent 🗸	Authors/Reviewers	∽ Blogs	
Volume 10, Issue 8 August 2020	RESEARCH ARTICLES AUGUST 01 20		a Mob	ile Application	to Support	
Hospital Pediatrics	Family-Delivered Enteral Tube Care FREE					
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Aims



- Aim 1: Design the MedS@HOME intervention through participatory co-design with stakeholders
 - Three design teams: Primary caregivers, Secondary caregivers, Experts in medication safety / CMC clinical care
- Aim 2: Evaluate the effectiveness of MedS@HOME on medication administration accuracy
 - ► RCT to test hypothesis that MedS@HOME improves medication administration for

Co-Designers



- 1. Primary caregivers (n=8)
- 2. Secondary caregivers
 - School nurse
 - Home health nurse
- 3. Clinicians who care for CMC
 - 2 nurses
 - 1 complex care pediatrician
 - 2 pediatric clinical pharmacists
 - 1 home health company representative

Gender	Woman 14 (87.5%)
N (%)	Man 2 (12.5%)
Race	White/Caucasian 16
M(SD)	(100%)
Age	37.6 (10.0)
M(SD)	
Geographic Area (Primary caregivers)	N (%)
Rural	3 (37.5)
Suburban	4 (50)
Urban	1 (12.5)
Household Income (Primary Caregivers)	N (%)
20,000-24,999	1 (12.5)
50,000-74,999	3 (37.5)
100,000 and above	3 (37.5)
CMC Clinical Characteristics	M(SD)
# of caregivers per month	10.8 (SD=7.1)
Daily medications	10 (6.2)
Hospitalized days in past year N (%)	
None	3 (37.5)
1-4	3 (37.5)
5-10	1 (12.5)
11-20	1 (12.5)

Co-Design of Meds@HOME



Design Stage	Problem Identification	Solution Generation	Convergence	Prototyping	Evaluation	
	Aug 2022	Sept 2022	Oct 2022	Nov 2022	Dec 2022	
Primary	Session 1	Session 2	Session 3	Session 4	ndividual	
Secondary		Session 1			Session 2	
Clinician	Se	Session 1			Session 2	
Research team	Weekly debrief, consensus discussion, and planning for next session *User experience designer and software developers made prototype changes within and between sessions					
Example Prompts	with medication administration?" "What have you o	nedicationneed to ensurewhat you rnistration?"safe medicationmedicationdelivery acrosschild?child?t have you done to keepall caregivers?"How easy		"Do these feature what you need medication safe child? "How easy to us prototype?"	ed to ensure afety for your	
Design activities	Journaling Brainstorming		Consensus building Live prototyping	Think-aloud pro walkthrough	ototype	

Co-Design of Meds@HOME



Giving the right medications at the right time

"Some of these medications can be very dangerous if he gets too much... I've even caught medications that someone has drawn up wrong, or even medications that I've drawn up wrong." (primary)

Communicating about medications

"Lack of communication about whether a medication was given can lead to double dosing." (primary)

Accommodating complex medical needs

"It may be nice to have a central place where we can describe things that are happening. Like, this child had ten seizures today...And then parents, rather than trying to remember what we said, or how we said it, or what we described the seizure looked like, can take [the app] to their clinician." (secondary)

Meds@HOME Overview Video





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Aim 2



- Evaluate the effectiveness of MedS@HOME on medication administration accuracy.
 - Hypothesis: medication administration accuracy is improved with use of MedS@HOME within networks caring for CMC ages 0-17 years, who use high-risk medications
 - Aim 2a. Evaluate MedS@HOME's effect on *primary caregiver* medication administration accuracy.
 - Aim 2b. Evaluate MedS@HOME's effect on secondary caregiver medication administration accuracy.

Research Trajectory



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Integration into Primary Care



- Platform for many other aspects of "caregiver work"
 - Shed light on the "invisible system" of care at home
 - Understand this work system through data
 - Support this work system / Learning Health System

EHR integration

- Communication between caregiving team and clinical team
- Opportunity for primary care recommendations, remote monitoring, AI to identify risk, etc

Key unknowns

- İmplementation of the technology across populations
 - Through clinicians? Family and stakeholder organizations?
 - Free availability / word of mouth?
- Sustaining technology infrastructure

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- Family and community co-designers
- Noble Applications Inc
- Funding from AHRQ R18HS028409







Questions







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Please complete the short evaluation poll after this webinar!