Shared Decision Making in Primary Care

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The remaining activity faculty or planners have no financial relationships to disclose.

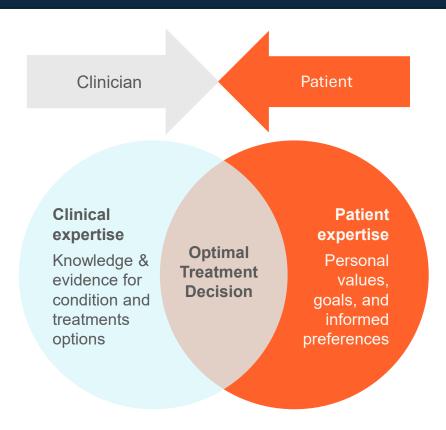
Learning Objectives

- Define shared decision making (SDM) and understanding the 'what', 'why', and 'how'?
- Identify key components and tools enabling effective SDM
- Recognize challenges and opportunities to implementing SDM in routine clinical practice
- Describe opportunities for impact of SDM in primary care
- Learn real-world strategies from case studies and approaches to successful integration of SDM

What is the concept of shared decision-making (SDM)?

SDM combines the realms of clinical expertise with patient expertise through effective communication to arrive at informed care delivery decisions aligned with a patient's values, goals, and preferences

- Clear
- Accurate
- Unbiased / Impartial
- Tailored
- Comprehensive*

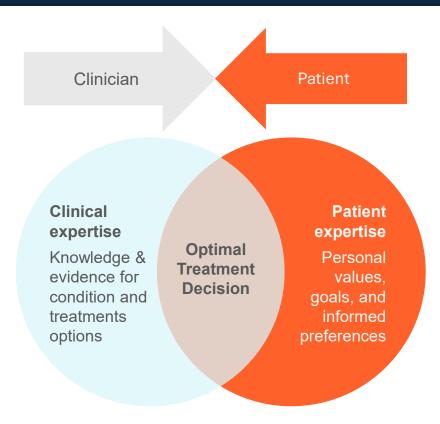


- Appropriate time
- Sufficient space
- Promoting agency
- Adapted to situation
- Iterative approach

Why is there a spotlight on SDM in current health care?

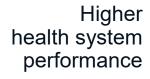
SDM is ethically the right thing to do, serves as "perfected" informed consent, and enables better value care (i.e., health outcomes relative to total costs of care)

- Improved health outcomes
- Improved decision quality
- Greater patient agency
- Greater patient concordance



- More appropriate utilization
- Lower Costs
- Reduced health disparities
- Greater patient experience

US Health Care: Population-level performance in crisis



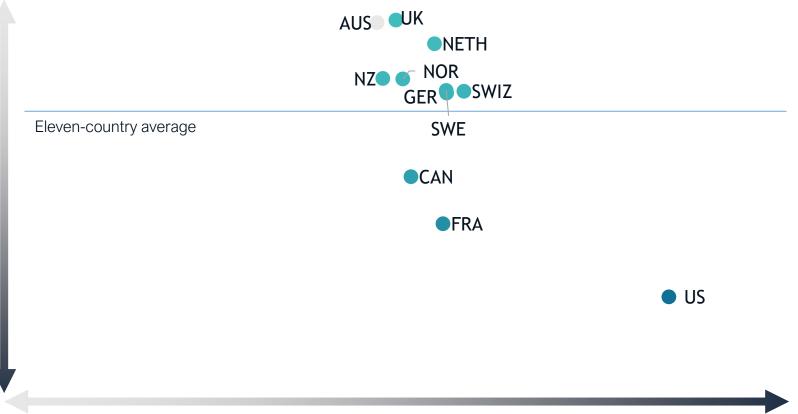
72 Indicators across 5 Domains

1. Care process
2. Access

3. Administrative efficiency 4. Equity

5. Health care outcomes

Lower health system performance



Higher health care spending

Mirror, Mirror 2017: International

Comparison Reflects Flaws and

THE AMERICAN

HEALTH CARE

PARADOX
WHY SPENDING MORE

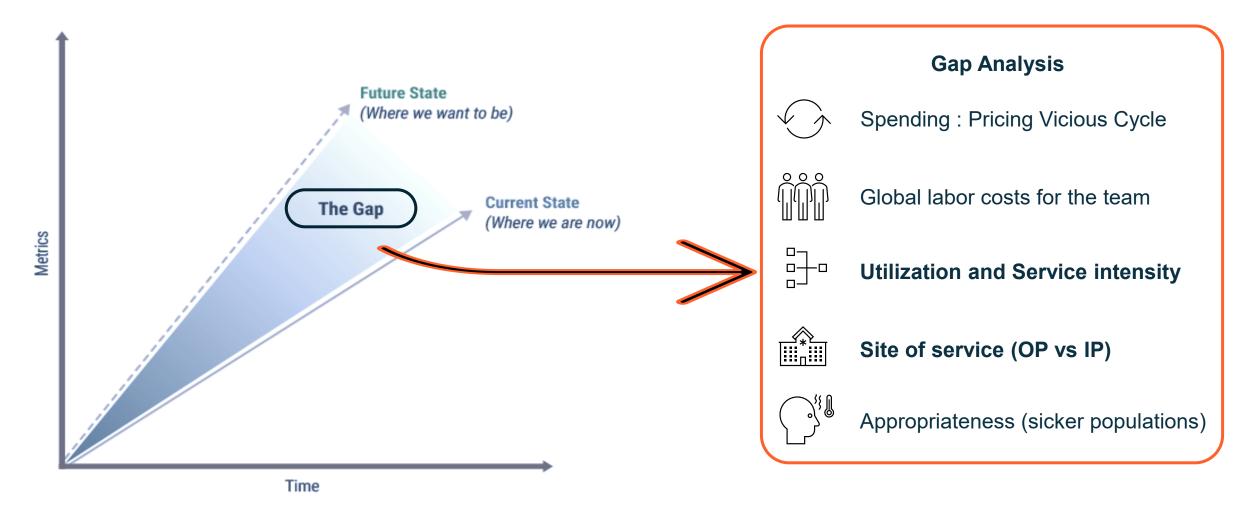
IS GETTING US LESS

Opportunities for Better U.S. Health

Note: Health care spending as a percent of GDP. Source: Spending data are from OECD for the year 2014 and exclude spending on capital formation of health care providers.

Lower health care spending

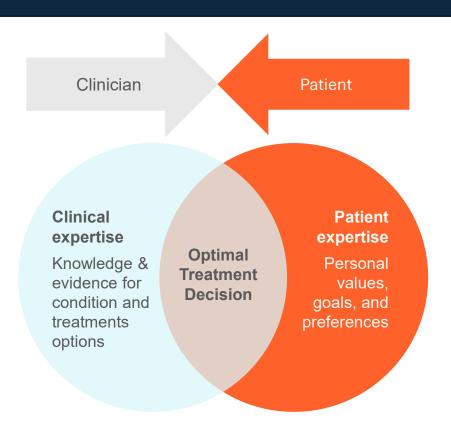
Closing the Gap by Understanding the Root Causes



^{*} OECD Health Statistics Data / US National Health Care Expenditure estimates; 44% higher rates of MRI; 62% higher rates of CT; Higher rates of post-acute care / specialty outpatient care

SDM is enabled by several tools and technologies

Enabling tools and technologies include those that are clinician focused or both patient and clinician focused



Enabling Tools and Technologies for SDM

Clinician-focused

- Decision Coaching Tools (Skills Training)
- Decision Support Analysis Tools
- Patient reported outcome measurements (PROMs)
- Decision Quality Instruments (DQMs)

Patient and clinician focused

- Patient Decision Aids (PDAs)
- PROM-enabled Decision Aids (PRO-DAs)*
- Al-enabled Decision Aids (Al-DAs)*

Decision Coaching Tools

			. , ,			
OPDG	Decision Coaching					
Step	Elements	Process	Suggested Language			
	Build skills in deliberation/ communication	Introduce and explain the OPDG. Be ready to record responses on the form as you facilitate discussion of the options.				
Step 1. Clarify	Assess/discuss decision-making	Clarify the decision: Make sure that the person knows exactly what decision they are facing.	Tell me about the decision you are facing. What are your reasons for making this decision			
the decision	needs	Assess stage of decision making	When do you need to make a choice? How far along are you in making a choice?			
Step 2. Explore the decision	Assess understanding	Assess facts: options, benefits, harms/risks/side effects, probabilities	Tell me about the options you have. Tell me what you know about the reasons to choose an option (benefits). What do you know about the reasons to avoid an option (harms/risks/side effects)?			
	Provide information	Provide clarify/reinforce facts and realign expectations	That's right; You've got it. Did you know? The research shows			
	Clarify values	Assess values/importance of outcomes of options	Which benefits are most important to you? Which harms (risks/side effects) do you want to avoid?			
		Clarify and facilitate communication of values	On a scale of 0 (not at all important) to 5 (extremely important), how would you rate th importance of the benefits. And of the harms?			
		Preferred option	Thinking about your ratings, what option do yo prefer?			
	Assess/discuss decision making needs	Assess the involvement of others in the decision (opinions, support, pressure)	Who else is involved in the decision? Are you feeling pressure from anyone to choose a specific option? How could they support you?			
		Develop skills/confidence in steps of decision making, communicating preferences to others, and handling pressure	Whose opinion is most important to you? Can you block out opinions that don't matter? What role do you prefer in making the choice?			
Step 3. Identify decision making needs		(Re-)assess decisional needs using the SURE scale items	Do you know the benefits and risks of each option? Are you clear about which benefits and risks matter most to you? Do you have enough support and advice to make a choice? Do you feel sure about the best choice for you			
Step 4. Plan next steps based on identified needs	Facilitate progress in decision making	Facilitate development of a plan for next steps to address unresolved decisional needs:	What else do you need to make a choice? What do you think are the next steps? When do you plan to?"			
	Screen for implementation needs	Determine what is needed to implement the preferred choice	What do you need to carry out the choice?			
	Facilitate progress in decision making	Discuss sharing his/her preferences with their health care practitioner. Encourage him/her to take the OPDG to their next appointment.	Do you have questions you want to ask to clar the options? Do you feel comfortable sharing your preferred option with your practitioner?			
	Build skills in deliberation, communication, and accessing support	NOTE: if 2 people are involved, highlight areas of agreement/disagreement on values, pressure and support. Make sure each person has a chance to express their response to the questions. If one person is more vulnerable, then have that person respond first (e.g., child then parent; frail elderly then caregiver)				



Clarify your decis	sion.								
What decision do you face?									
What are your reasons for making this decision?									
When do you need to ma	ake a c	hoice?							
How far along are you w	ith mak	ing a choice?	_		ught about it g about it	_	lose to choo lade a choic	-	
Explore your dec	ision.								
Knowledge List the options and bendand risks you know.	efits	using sta	Values ch benefit a ars (★) to s ch one ma	show h	ow	Choose the optio most to you. Avoithat matter most	d the option:		
		easons to Ch this Optior fits / Advantage	1	matt 0★	w much it ers to you: not at all a great deal	Reasons to this Opti Risks / Disadvanta	on	matte 0★	much it rs to you not at all great dea
Option #2									
Option #3									
Which option do you pre	fer?	Option #	! 1		ption #2	Option #3		Unsure	
Support									
Who else is involved?									
Which option do they pre	efer?								
Is this person pressuring	you?	☐ Yes	□ No	0	☐ Yes	☐ No	☐ Yes		No
How can they support yo	ou?								
What role do you prefer making the choice?	in	☐ Share th			g views of				

Identify your decision making needs. Adapted from The SURE Test © 2008 O'Connor & Léga ✓ ✓ ✓ ✓ Adapted from The SURE Test © 2008 O'Connor & Léga ✓ Adapted from The SURE Test © 2008 O'Connor & Léga ✓ Adapted from The SURE Test © 2008 O'Connor & Léga The Sure Test © 20								
	Knowledge	Do you know the benefits and risks of each option?	☐ Yes ☐ No					
4	Values	Are you clear about which benefits and risks matter most to you?						
99	Support	Do you have enough support and advice to make a choice?	☐ Yes ☐ No					
	Certainty	Do you feel sure about the best choice for you?	Yes No					
f you answer 'no' to any question, you can work through steps two on and four on focusing on your needs. Power to one or more of these questions are more likely to delay their decision, change their mind, feel regret about the holice or blame others for bad outcomes.								
9 Plan t	he next steps b	sed on your needs.						
Decision n	naking needs	✓ Things you could try						
R.	Knowledge	☐ Find out more about the options and the chances of the ber	☐ Find out more about the options and the chances of the benefits and risks.					
f you feel v	ou do NOT have	List your questions.						
enough fac		List where to find the answers (e.g. library, health professional	s, counsellors):					
4	Values	Review the stars in step two 9 to see what matters most to	•					
	IOT sure which	☐ Find people who know what it is like to experience the bene ☐ Talk to others who have made the decision.	ofits and risks.					
enefits an nost to you	d risks matter J	Read stories of what mattered most to others.						
		Discuss with others what matters most to you.						
88	Support	Discuss your options with a trusted person (e.g. health profes friends).	ssional, counsellor, family,					
f you feel y enough sup	ou do NOT have	Find help to support your choice (e.g. funds, transport, child ca	are).					
	PRESSURE from	Focus on the views of others who matter most.						
tners to m hoice	ake a specific	☐ Share your guide with others.						
		Ask others to fill in this guide. (See where you agree. If you disinformation. If you disagree on what matters most, consider the ot to listen to what the other person says matters most to them.)						
		Find a person to help you and others involved.						
B	Certainty	☐ Work through steps two ● and four ●, focusing on your ne	eds.					
	JNSURE about oice for you							
Other facto	rs making the	List anything else you could try:						
iecision Di	FFICOLI							

Decision Support Analysis Tools

User Manual -10-item Decision Support Analysis Tool (DSAT-10)

Definition

The 'Decision Support Analysis Tool' was originally developed to evaluate healthcare professional's use of decision support and communication skills during a clinical encounter [1]. The DSAT can also be used to evaluate the quality of decision support provided to patients by decision coaches whose role is to prepare them for decision-making with their health care provider. In 2008, the original DSAT was revised to the DSAT-10 that focuses on decision support only and uses a simpler coding system [2].

Sample Tool -DSAT-10

Element	Assessment Criteria	Hear acknowledge or assess	Intervened	Comments / Notes / Examples
Decision making status	Identify uncertainty about making a decision	(1 point)		
	Timing for when decision needs to be made is discussed / acknowledged	(1 point)		
	Stage of decision making: assessed or self-evident	(1 poi		
Knowledge of	Options AND Potential benefits of options AND Potential harms of options	(if all checked	(if all checked	
Values / preference associated with	Discuss importance of benefits AND Discuss importance of harms	(if all checke	 	
Others' involvement in the decision	Discuss preferred role in decision making, others involvement and their opinions AND Discuss pressure or support from others	(if all checked	(if all checked	
Next steps	Near end of the encounter, summarize the next steps to address patient's decision making needs	(1 point)	l	
	TOTAL SCORE		out of 10	

- Audio / video analysis
- Clinician-patient
- Listen twice
- Score
- Link dialogue to element

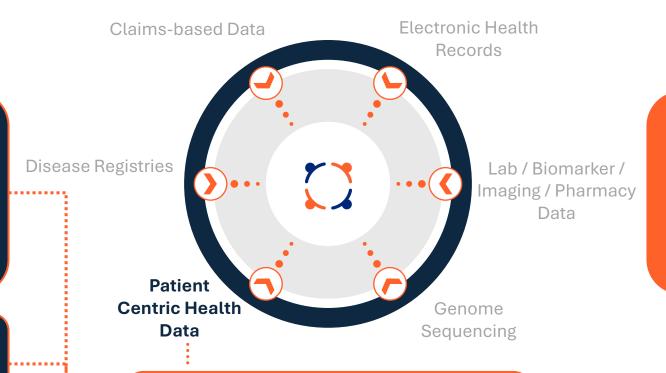
Patient centric health data are the 'gold standard' in defining value in health across the health information ecosystem

Patient-reported outcome measures (PROMs)

"Subjective, validated, quantifiable, self-reported measures of health status based on a direct report from patients without any interpretation or modification by a clinician or anyone else."

Decision Measures (SDMs)

- Decision quality
- · Decision conflict
- Decision regret



Digital Phenotyping

"The moment-by-moment quantification of the individual-level human phenotype in situ using activity, behavior, communications data from personal digital devices including smartphones / sensors"

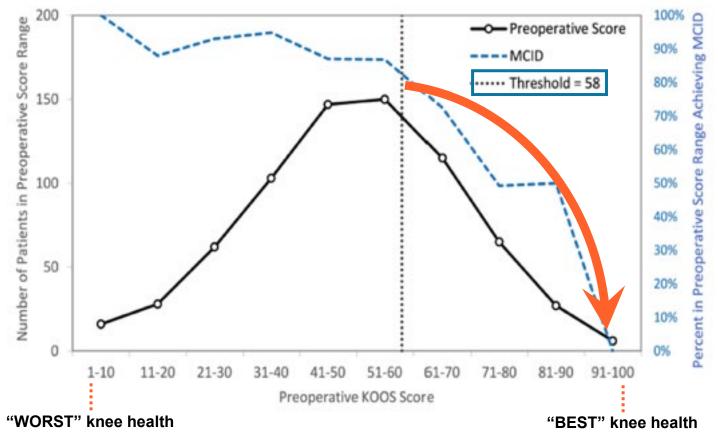
Actively Captured

 Patient Reported Measures (Surveys / Ratings)

Passively Captured

- Internet
- Wearables
- Apps / Social Media

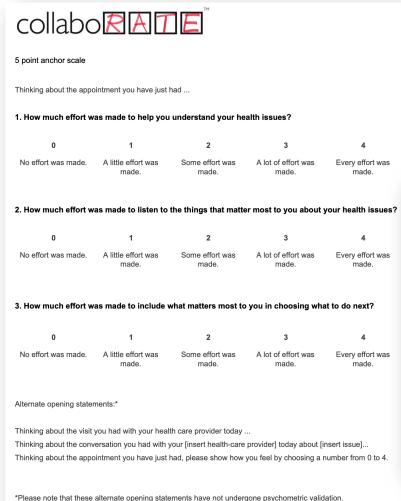
PROM-based clinical thresholds can advance decision support



Pre-operative PROM for knee health (KOOS Score) predicts the likelihood of benefit following joint replacement surgery for knee OA <u>and</u> the threshold (58) beyond which there are lower chances of clinical benefit

DQMs provide direct insights into key aspects of SDM

Collaborative Decision Support



Deliberation and Choice Awareness

Please think about the decision you made about after talking to your doctor, surgeon, nurse, health professional, etc.]. Please show how you feel about these statements by circling a number from 1 (strongly agree) to 5 (strongly disagree).						
1. It was	the right decision	1 Strongly Agree	2 Agree	3 Neither Agree Nor Disagree	4 Disagree	5 Strongly Disagree
2. I regre made	t the choice that was	1 Strongly Agree	2 Agree	3 Neither Agree Nor Disagree	4 Disagree	5 Strongly Disagree
	d go for the same if I had to do it over	1 Strongly Agree	2 Agree	3 Neither Agree Nor Disagree	4 Disagree	5 Strongly Disagree
ch n cally	oice did me a lot of	1 Strongly Agree	2 Agree	3 Neither Agree Nor Disagree	4 Disagree	5 Strongly Disagree
de 0	ecision was a wise one	1 Strongly Agree	2 Agree	3 Neither Agree Nor Disagree	4 Disagree	5 Strongly Disagree
Reg	ret Scale © AM O'Connor, 1996	University of Otta	wa			

Decision Regret Scale

SURE Test version for clinical practice

Yes equals 1 point No equals 0 point

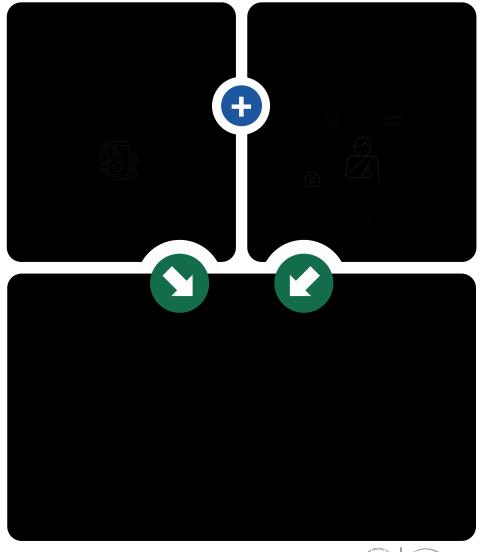
If the total score is less than 4, it indicates the probability that a patient experiences clinical significant decisional conflict.

		Yes [1]	NO [0]
Sure of myself	Do you feel SURE about the best choice for you?		
Understand information	Do you know the benefits and risks of each option?		
R isk-benefit ratio	Are you clear about which benefits and risks matter most to you?		
Encouragement	Do you have enough support and advice to make a choice?		

The SURE Test © O'Connor and Légaré, 2008 CollaboRATE survey. https://www.glynelwyn.com/collaborate.html

[Despite a wide range of tools and technologies] patient and clinician ratings of patient involvement in decision-making is highly variable and often misaligned. Clinicians frequently misperceive level of patient participation in decision-making. Critical need for improved implementation of decision support solutions with greater user engagement, experience, and alignment in SDM

Combining clinical decision support with patient centric care



 $^{^{1} \ \} Osheroff, Teich, Levick \ et \ al., 2012. Improving \ outcomes \ with CDS: an implementer's \ guide, Second \ Edition.$

² Dullabh P, Sandberg SF, Heaney-Huls K, Hovey LS, Lobach DF, Boxwala A, Desai PJ, Berliner E, Dymek C, Harrison MI, Swiger J. Challenges and opportunities for advancing patient-centered clinical decision supportfindings from a horizon scan. Journal of the American Medical Informatics Association, 2022 Jul 1297/17235-43.



Challenges and opportunities for advancement in patient centric clinical decision support



• **Culture** of clinicians not fully understanding SDM concept and experiencing the benefits of SDM first-hand at the point of care

"I already make good decisions"

"Why do I need a decision aid...my patients trust my decisions"

- Clinician education and value of SDM
- Multi-level promotion / marketing of decision quality and other health measures in clinical practice



Cost of implementation, licenses (especially PRO-DAs or AI-DAs)

"It's too expensive to integrate these tools in the EMR"

"It's a big lift to expect our clinicians and nurses take this on"

- Cost effective licensing, tech infrastructure, EMR integration, smart interfaces, and services
- Optimizing SDM culture through maximizing payment updates (PRO-DAs), quality requirements, VBP models



Technical

Complexity of accessing decision aids / PROs with just in time / real-time visualization of patient information

"It seems challenging to access SDM tools in busy clinics" "These tools are yet another system we need to navigate" Intelligent SDM integration protocols, UX/UI, data visualization



 Complexity of operational burden of SDM tools and technologies potentially slowing down clinic efficiency

"I can imagine my clinic running behind"

"It feels too disruptive to the workflow to do SDM"

- Q.I initiative / workflow redesign (SDM champions); Intelligent dashboards with metrics of clinic times alongside experience ratings
- Operationalize SDM approach during intake / patient outreach

Rationale for improving patient centric decision support

Current decision support solutions often care lack personalization and person-specific guidance informed by clinical and patient-level data

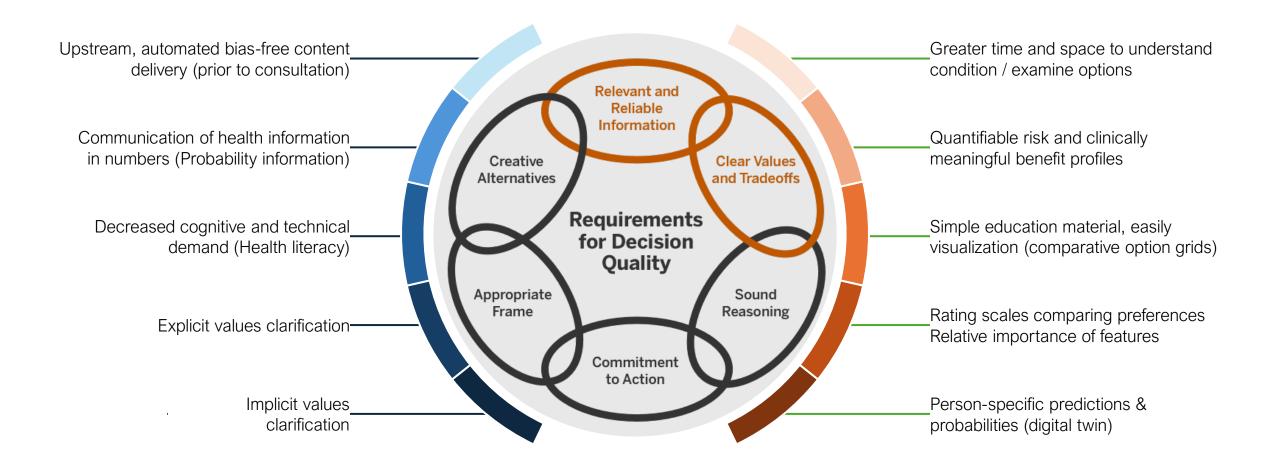
SDM / PC-CDS approaches remain **highly** variable with lack of universal integration and adoption at the POC

Current decision support solutions rarely relieve systematic pressures (FFS) or actively drive whole person care strategies

Marked variation in SDM decision aid **quality**, ability to **integrate** into clinical workflows and digital health records

100s decision aids but they mostly focus on patient education alone rather than clinician-patient engagement

What makes a good decision and patient decision aid?



A Five-Step Process for PC-CDS through effective SDM













SEEK your patient's participation

Communicate that choices exist & encourage patient involvement in conversations

HELP your patient compare treatment options

Communicate health information including benefits, harms & risks of each option

ASSESS your patient values & preferences

Take active account of what matters most to your patient & their valued life activities

REACH a decision with your patient

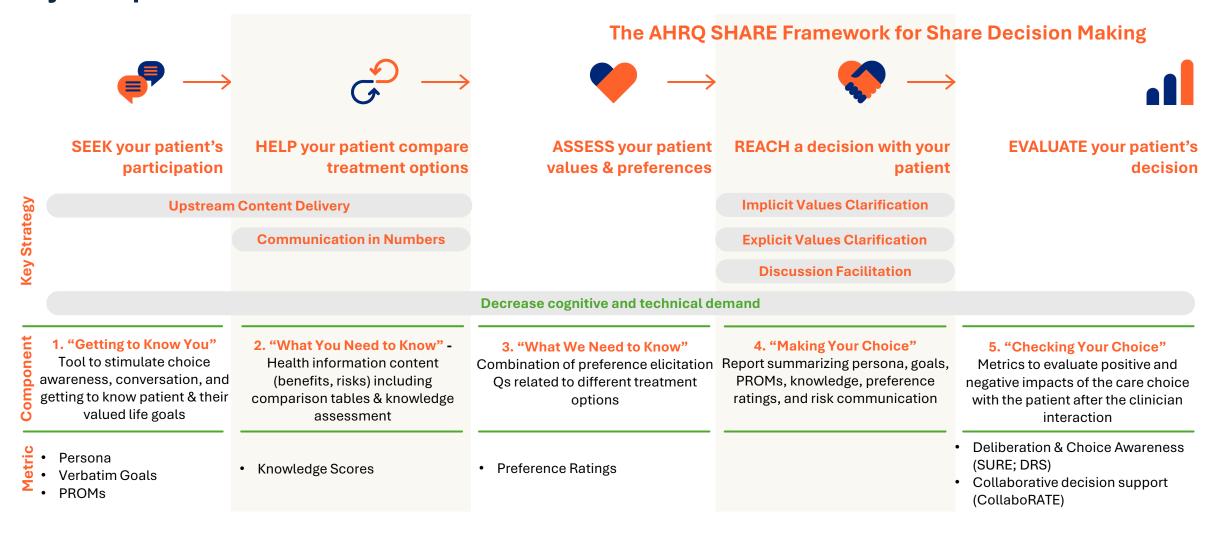
Take time to decide the best care choice or set of choices with the patient

EVALUATE your patient's decision

Assess the positive and negative impacts of the care choice with the patient

Adapting this approach to shift the concept of shared decision making (SDM) from a provider-led, clinical concept to a consumer-focused, direct-to-patient, decision support solution accessible across the continuum of care

Redesigning the SDM capability with 6 Must-have strategies that can be applied to 5 key components and health choice metrics



The patient journey using PC-CDS



different scales

Selects preferences / goals related to

different treatment strategies using

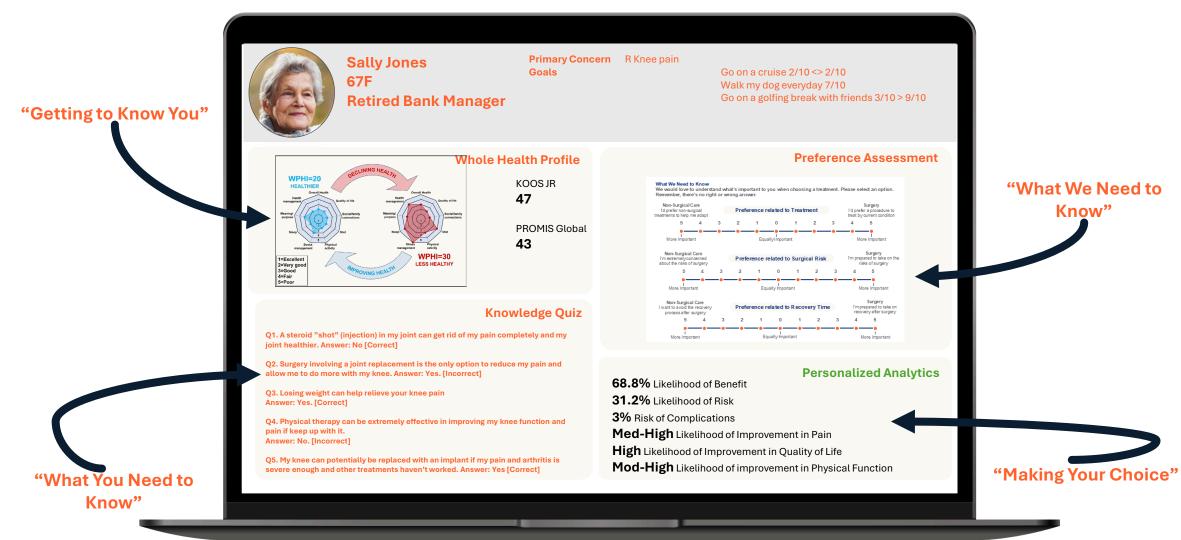
"Getting to Know You"

Provided a link to the complete global health measures and completes initial survey including PROMs for general health status Patient Centric Decision Making

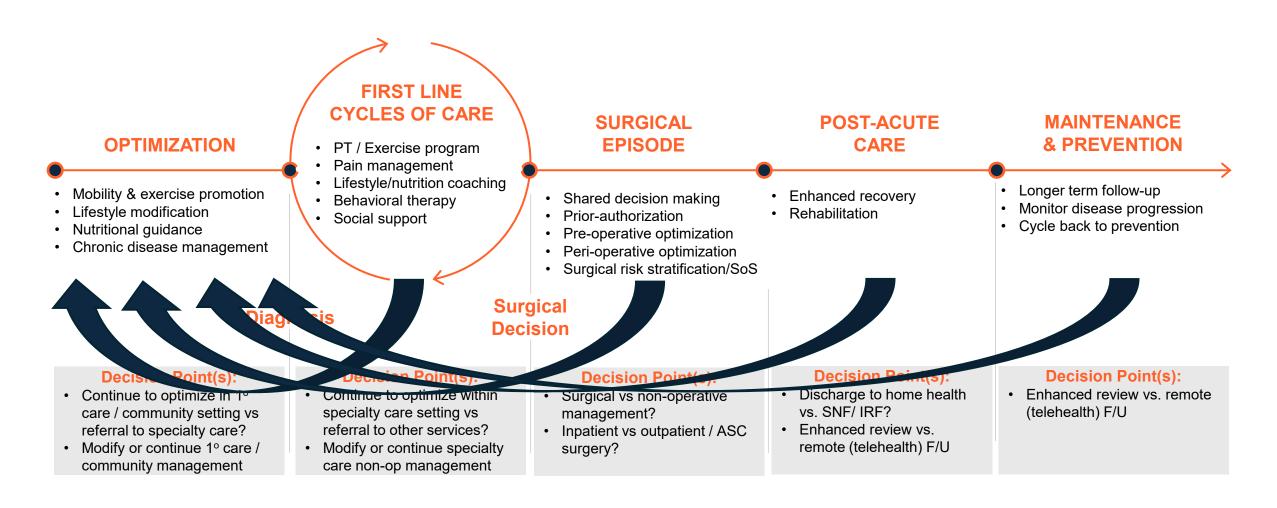
Sally and her clinician engage in a patient centric decision making conversation to arrive at an appropriate health choice

Stock photo used.

Future Scope: Component 4. "Making Your Choice"



Upstreaming health information and opportunities for patient centric clinical decision support



SDM in Primary Care

Patients with multi-morbidity and making complex care decisions with a PCP. SDM is a fundamental concept in health promotion and prioritizing care for complex needs populations. Four core attributes: Partnership based on mutual trust (sufficient consult time); Multidimensional information exchange (decision aid design); Complex trade-offs (efficient utilization medical resources); Iterative communication and evaluation by PCPs (skills training) ¹

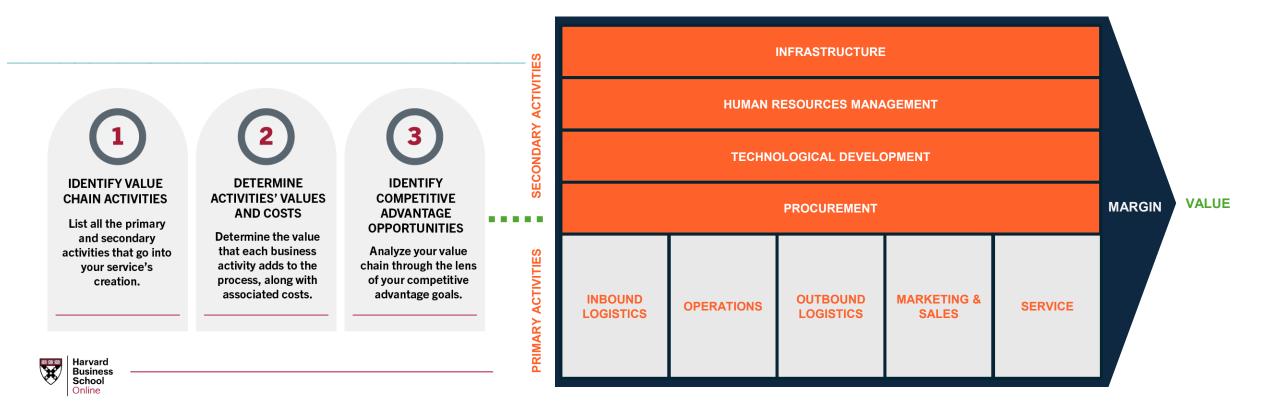
PCPs play a central role in shifting from a compliance-oriented model to active participatory model for cardiovascular care through SDM (5Ps): Predictive, preventive, participatory, personalized, precision medicine. SDM can underscore patient empowerment of their condition, self-management. ²

PCPs can benefit from using SDM in collaborative care models for improving the management of acute and chronic pain. An SDM can effectively reduce opioid consumption without compromising self-reported pain levels. Patient satisfaction, QoL, and patient—provider communication are also likely improved. 4

PCPs engaged in management of mental and social health concerns can benefit from utilizing SDM strategies in shifting from a biomedical to a biopsychosocial (human rights) based model of care. There is a critical need for PCP champions; PCP-led therapeutic alliance; ability to adapt to fluctuating capacity; shift in behavior and attitudes toward SDM key ³

PCP engagement in SDM spans acute and long-term medical co-management alongside preference sensitive discretionary care

How can we optimize the implementation of SDM?



Defining a value chain to accelerate SDM implementation

INFRASTRUCTURE

Institutional overhead, management, financing and planning to implement platform

HUMAN RESOURCES MANAGEMENT

Core Team (Clinician + Local IT + Operational / Implementation + Platform champion) + Broader Transformation Team

TECHNOLOGICAL DEVELOPMENT

IT infrastructure and systems; Data sharing; Partnership with EMR; Point of care resources; Security / Risk; A.I-enablement

PROCUREMENT

Costs (Platform; FTEs; Data collection, storage, analysis, viz; Licensing); Set-up and maintenance; Human service support

INBOUND LOGISTICS

- Define measures & measurement goals
- Streamlining administration and & intake / capture
- Parsimonious measurement sets

OPERATIONS

- Navigator frontlines
- Embed in decision making workflow
- Sharing / communicating across systems

OUTBOUND LOGISTICS

- Link to actionable guidance /to patient (UX/UI)
- Real-time reporting / Registry / feedback
- POC functions

MARKETING & SALES

- KLT (Bob Burg)
- Promotion / ads
- Prove efficiency, experience, outcomes, utilization
 *metrics of success)

SERVICE

- Workflow integration
- Define human, technical, system facilitators
- Stakeholder education
- Driving advocacy



MARGIN

VALUE

Shared Decision Making with PROs

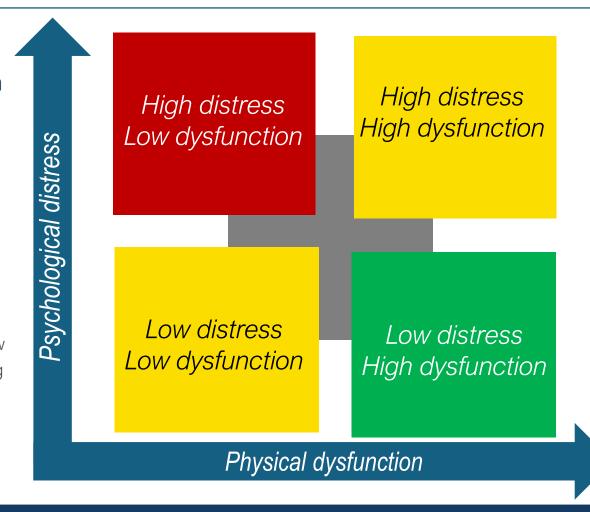
Can be simplified along the two domains of physical function and psychological distress

Not a biomedical problem

This patient's does not have a primary MSK problem. Their psychological distress is likely the primary driver of their pain.

Assess Expectations

This patient is at risk of having a low incremental benefit or not achieving the MCID. Their expectations may be high either appropriately or inappropriately



Behavioral health co-management

This patient may be an appropriate candidate for surgery but also has high psych distress and would benefit from at a minimum co-management of the psych distress.

Ideal surgical candidate

Likely to meet the MCID, problem is most likely biomedical in origin.

What are the domains of psychological distress?

More heterogeneous, and more specific than mood disorders

Negative Mood

Constructs measured:

- Depression
- Anxiety
- Anger

Fear Avoidance

Constructs measured

- Fear avoidance
- Pain Catastrophizing
- Fear of movement
- Pain Anxiety

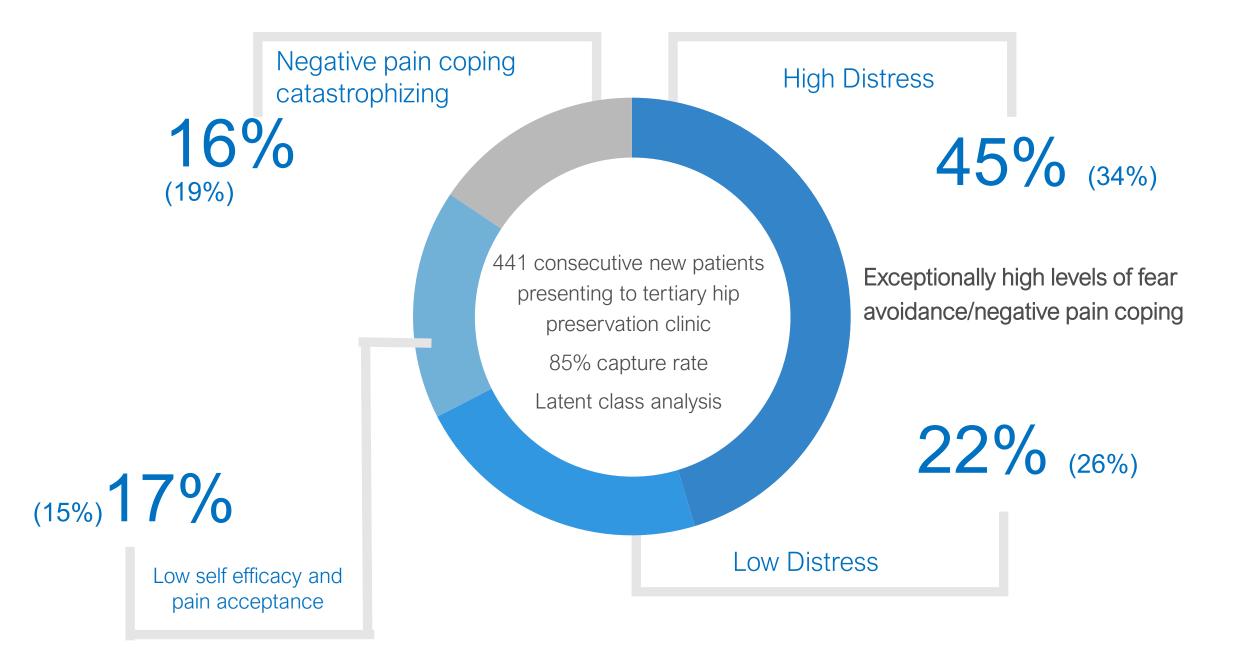
Negative Pain Coping

Constructs measured:

- Self-Efficacy for managing pain
- Self Efficacy for participating in Rehab
- Chronic Pain Acceptance







16%

Negative pain coping fear avoidance

High Distress

45%

"What about the tear" (MRI disease)

"Will I develop OA"

Address what pain means, risk of injury, etc.

Avoid MRI when possible – not benign but harmful as it allows for biomedical fixation

"When will I be pain-free/100%/perfect?"

Important to highlight pain is expected part of life, use personal stories

Talk about sleep

Understand barriers to care

17%

Low self efficacy & pain acceptance



Negative pain coping fear avoidance





Low self efficacy & pain acceptance

High Distress

Lean heavier on non-op/rehab

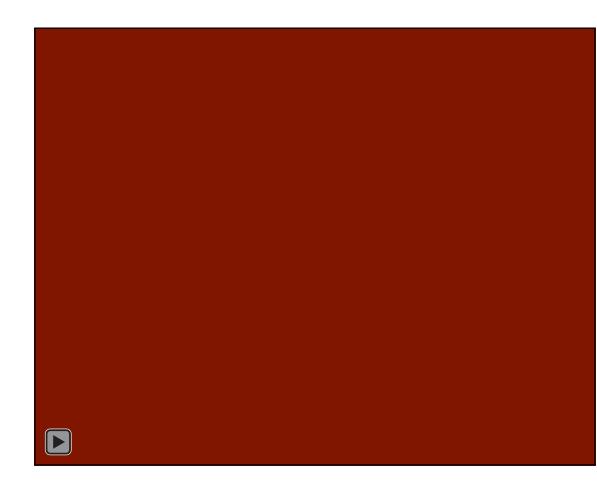
Incorporating psychological distress into decision making



Low Distress

Case example

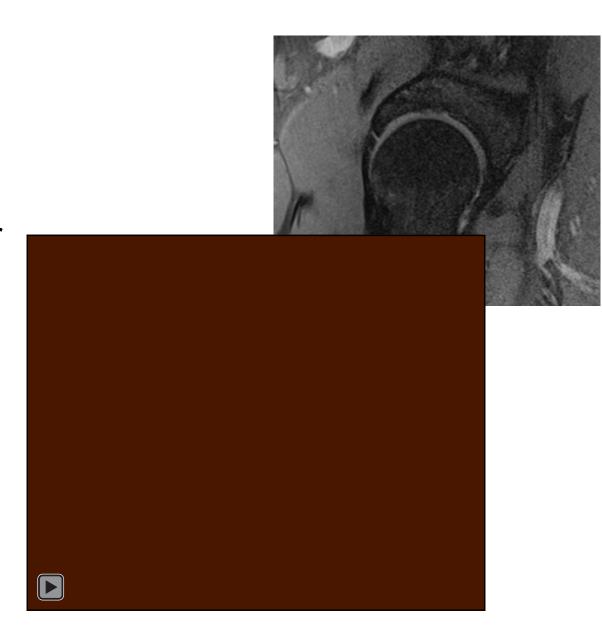
- 59 yo woman
- Referred by respected TJA partner
- 1 year of symptoms
- Multiple PT sessions over a few months
- 30 BMI
- No significant medical comorbidities
- Good social support

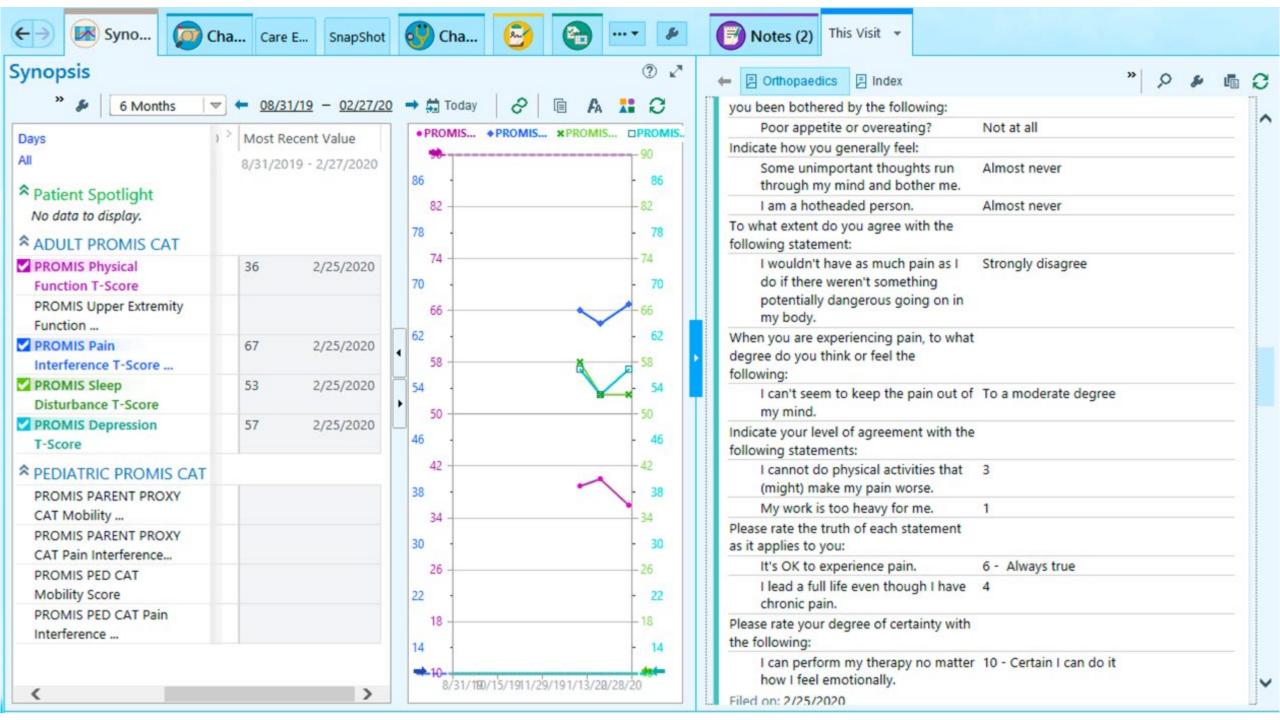




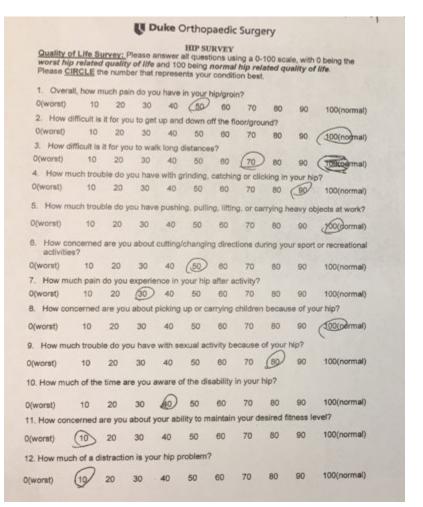
Case Example

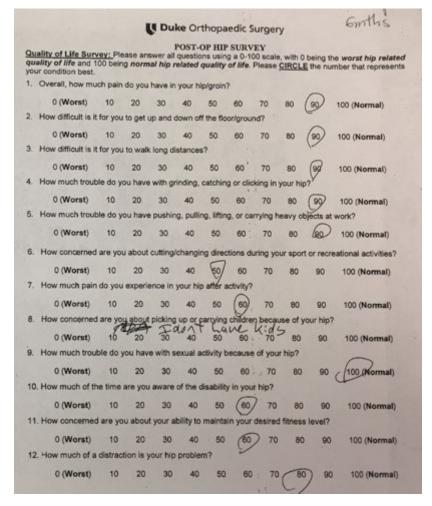
- 38 yo F
- 35 BMI
- Evaluated and treated by my PA for FAIS
- Failed non-operative treatment
- Here for surgical evaluation and discussion





Summary score trap







Current score = 60 Rescaled preop = 52 Current score = 78 (18 point gain)
Rescaled gain = 26
Worst preop scores = 50 & 70 point gains

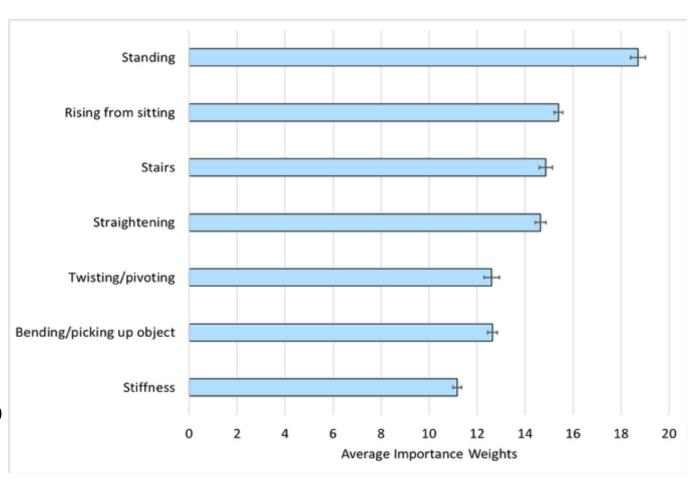
Preference weighting - KOOS Jr

Standing almost twice as important as stiffness

Patients value gains when starting from low functional levels more

Preference **E**valuation **R**esearch Group





Work in progress

Synopsis

- Strong evidence for SDM enabling high value across the care continuum
- Primary care and PCPs are well-positioned to engage in SDM
- Upstreaming offers several benefits to patients and all HCPs across episodes of care
- Implementation is the key and workflow integration critical for success
- SDM is all about trust and PDAs are the tools that can augment the process



