

Interdisciplinary Heart Team (IHT) Model – Factors for Consideration

The following checklist has been developed to support the successful adoption of the Interdisciplinary Heart Team Model and includes numerous items to be considered when operationalizing Interdisciplinary Heart Team (IHT) integrated decision making forums.

1. IHT Forum Purpose

- What disease state will be the focus of the IHT?
 - Aortic Valve Disease
 - Mitral Valve Disease
 - Coronary Artery Disease (Atherosclerosis)
 - Other

- What are the objectives of your IHT?
 - Ensure that all appropriate diagnostic tests, all suitable treatment options, and the most appropriate treatment recommendations are generated for each patient discussed at the IHT
 - Ensure adherence to relevant best practice guidelines and standards
 - Provide a forum for the continuing education of medical staff and health professionals
 - Contribute to patient care quality improvement activities
 - Contribute to the development of standardized patient management protocols
 - Contribute to the development of patient and family educational material
 - Contribute to innovation, research, and participation in clinical trials
 - Contribute to linkages among regions to ensure appropriate referrals and timely consultation, and optimize patient care

- How will your hospital structure the IHT to meet these objectives?
 - Input and ideals should be encouraged from all members of the IHT
 - Identify training and education opportunities that will increase knowledge and understanding of the goals of the IHT
 - Discuss opportunities for service and quality improvements within the hospital and across referring centres/physicians

- Develop and document standardized patient management protocols
- Develop patient educational materials
- Other
- How will hospital management (administrative and clinical) contribute to the ongoing success of the IHT?
 - Provide supports (e.g. access to well-equipped meeting rooms)
 - Recognition of IHT and members
 - Encourage team cohesion

2. Identification of Patients

- Which patients will be discussed?
 - All patients
 - Specific patients
 - Other
- Who is responsible for identifying patients for discussion?
 - Cardiac surgeon
 - Cardiologist (Electrophysiologist, Interventional, Echocardiologist, Heart Failure Specialist)
 - Other
- How will one refer patients to be discussed at IHT meetings?
 - Submit patient case summary to IHT meeting coordinator by a deadline
 - Other
- Will patients need to be prioritized for the meeting, such that certain cases are discussed?
 - Establish priority categories (e.g. 1,2,3: 1-required to discuss, 3-if enough time, will discuss)
 - Establish criteria for prioritization categories
- How will the required patient information that needs to be reviewed at the IHT be made available?
 - How will radiology/diagnostic cath/echo reports and images be made available?
 - Who will coordinate the patient case specifics for the IHT participants to review?

- What is the minimum amount of information that needs to be summarized for the patient to be effectively reviewed by the IHT?
 - Complete a template of the required information the clinician needs to submit so that the IHT members can understand the patient case
- How will the IHT handle cases that need treatment recommendation prior to the next IHT meeting?
 - Ad hoc meetings
 - Other

3. Roles and Operational Issues

- Who will be the Coordinator and what will his or her responsibilities be?
 - Collect patient summaries
 - Create the list of patient cases, based on the cases forwarded by individual physicians
 - Setting the agenda
 - Notify core and adjunct members of meeting schedules
 - Ensure all relevant up-to-date patient information is available for the meeting
 - Maintain attendance records
 - Track issues and actions (meeting notes) including relevant operational and quality improvement recommendations
- How late can one identify a patient for review in the next IHT meeting?
 - Provide a deadline
- When will the meetings be held and how often?
 - Weekly
 - Biweekly
 - Monthly
 - Other
- How long will the meeting last?
 - One hour
 - Other

- Where will the meeting be held?
 - In-person (meeting room)
 - Teleconference
 - Other
- What equipment and facilities will be needed for the meeting?

4. Terms of Reference & Evaluation

- Who will complete the first ToR to guide the IHT operations and conduct?
 - Person to draft the document (refer to ToR template)
 - Finalize ToR document
- How often will the ToR be reviewed?
 - Annually
 - Biannually
- How/when will the IHT approach and function be evaluated?
 - IHT evaluation form
 - Forum to share IHT model successes
 - Evaluation using validated tool (i.e. The Team Climate Inventory)
- What is the most appropriate data to collect to monitor the IHT success?
 - Documented process for determining patient procedure eligibility
 - IHT outcomes (i.e. appropriate attendance, meeting frequency)

5. Other Considerations

- How will the success of the IHT be measured?
 - Attendance record goals
 - Review of percentage of appropriate IHT reviews
 - IHT member satisfaction survey
 - Percentage of adherence to structural heart Patient Eligibility Criteria Guidelines as developed by CorHealth Ontario