

**OPTN Operations and Safety Committee
Mandatory Usage of Offer Filters Workgroup
Meeting Summary
May 23, 2022
Conference Call**

**Kimberly Koontz, MPH, Co-Chair
Charles Strom, MD, Co-Chair**

Introduction

The Mandatory Usage of Offer Filters Workgroup (the Workgroup) met via Citrix GoToMeeting teleconference on 05/23/2022 to discuss the following agenda items:

1. Concept Paper Outline
2. Offer Filter Options
3. Next Steps

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

1. Concept Paper Outline

The Workgroup reviewed the structure for their concept paper.

Data summary:

The Workgroup voted on changing the title for their concept paper from the Mandatory Usage of Offer Filters to Optimizing the Usage of Offer Filters (6 yes, 3 no, 0 abstain).

Staff reiterated the key discussion points from the previous workgroup call on 5/20/22 and offered new discussion questions.

Summary of discussion:

Two members supported the previous decision to have default filters turned on by default, but offer programs the ability to adjust the recommended filter criteria. Staff added that programs would also have the ability to turn off filters if desired.

The Co-Chair requested feedback on whether pediatrics should be treated differently than adults with regards to filter application. A member noted that pediatrics should not have the filters applied, as both there are a smaller number of donors and programs will likely want to see every possible pediatric offer. Three members supported this opinion.

A member stated that programs should have the ability to assign filters to candidates over a certain age limit, considering that many marginal donors tend to be older. A second member also proposed being able to exclude from filters based off of wait time, as candidates with longer wait times likely will consider more marginal offers.

Staff noted that any exclusion criteria are user-driven by the transplant program, as the model does not automatically exclude any candidates. There is potential in the future for the development of automatic exclusions to be built into the model.

Next steps:

Staff will incorporate the Workgroup feedback into the concept paper.

2. Offer Filter Options

The Workgroup reviewed specific discussion questions for the offer filter options. Additionally, they also reviewed communication strategies for increasing community awareness of offer filters.

Data summary:

- How could a program show a change in behavior in order to modify a mandatory filter?
- What would constitute a change in behavior?
- How could a program modify a filter after a change in behavior?
- Should mandatory filters exclude certain types of candidates?
- How often should the OPTN re-evaluate the mandatory offer filters?
- How should we measure the success of mandatory offer filters?
- Rather than making filters mandatory, should we turn model identified filters on by default?

Staff also gave a brief overview of the awareness opportunities that the Workgroup will be sponsoring moving forward, highlighting specifically regional meetings, where members successfully using voluntary offer filters will present on best practices.

Summary of discussion:

Staff clarified that, within the concept paper, all possible options will be outlined, with the Workgroup recommendation being highlighted.

A member suggested that the awareness presentations should focus on the offer filters explorer, which can show programs exactly what they would be missing with different filters implemented. This would help convince programs who have concerns about missing otherwise acceptable offers.

A Co-Chair wondered how often a program's acceptance criteria should be re-evaluated for programs that turn off all filters. A member also asked how programs would be aware of the changes in behavior necessary to loosen their filter criteria, as they will no longer see offers that met their refusal criteria in the past. A Co-Chair suggested that a quarterly report could be distributed that would highlight the donors that were bypassed by the offer filters. A member added that this could provide programs reassurance that there are continued updates to what the default filters should be. Staff noted that a possibility to allow programs to consider offers that otherwise would have been filtered would be to randomly allow a small percentage of screened offer through. This would give programs the opportunity to consider offers that were outside their traditional acceptance criteria. A member suggested this should be done only during specific times, as it would be confusing if the timeline were not driven by the program.

It was suggested that the report that shows all the offers that were filtered out during a specific time period should be updated with more information, as a member noted it was "glitchy".

Next steps:

Staff will incorporate the Workgroup's feedback into the concept paper.

3. Next Steps

This agenda item was not discussed.

Upcoming Meeting

- June 27, 2022

Attendance

- **Committee Members**
 - Kimberly Koontz
 - Greg Abrahamian
 - Sanjeev Akkina
 - Katherine Audette
 - Jill Campbell
 - Valerie Chipman
 - Reginald Gohh
 - Caroline Jadlowiec
 - Christopher Jones
 - Laura O'Meila
 - Melissa Walker
- **HRSA Representatives**
 - Raelene Skerda
- **UNOS Staff**
 - Sally Aungier
 - Isaac Hager
 - Robert Hunter
 - Carlos Martinez
 - Kerrie Masten
 - Lauren Mauk
 - Brittany Shean
 - Sharon Shepherd
 - Darren Stewart
 - Kaitlin Swanner
 - Joann White