Technical Expert Panels

A *Technical Expert Panel (TEP)* is a group of stakeholders and experts who provide direction and input to the measure developer in every phase of the measure development process. During this process, TEP members may

- Review new measure concepts to help determine which should be selected for further development;
- Review the findings from testing for measures under development;
- Advise the measure developer on which measures should be recommended to CMS based on criteria such as whether patients will find the measure(s) meaningful and important; and
- Advise the developer on other quality measurement and measure development topics (e.g., gap analysis for a program or measure development process improvements).

Convening a TEP ensures transparency in the measure development process and provides developers with input from multiple stakeholders.

TEP members may include patients and family members (caregivers), clinicians (i.e., physicians, pharmacists, registered nurses), statisticians, quality improvement experts, methodologists, and experienced measure developers. TEPs for electronic clinical quality measures (eCQMs) may also include implementers of electronic health record (EHR) systems, clinical informaticists, EHR/information technology vendors, programmers, coding experts, and current EHR users.

Steps to Convening a TEP

When convening a TEP, measure developers typically complete the following steps: [1]

- Draft the TEP charter. The charter contains information about the TEP's goals and objectives, members' scope of responsibility, and how the information gathered from the TEP will be used
- Consider potential TEP members for recruitment
- Notify relevant stakeholder organizations
- Post the call for TEP nominations on an appropriate website
- Select the TEP
- Select a chair or meeting facilitator
- Post the TEP membership list and projected meeting dates
- Arrange TEP meetings
- Send materials to TEP members
- Conduct TEP meetings and take minutes
- Prepare and post a TEP summary report

The order of the steps and the way they are implemented may vary. All steps are described in the Measures Management System (MMS) Blueprint (v13.0 -Chapter 12: Technical Expert Panels).

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[1]Templates for web postings, the call for TEP, nomination form, membership list and TEP charter are available in the MMS Blueprint (v13.0 - Section 4. Forms and Templates).

Best Practices

CMS has consulted with experienced developers to identify best practices about how to prepare for and convene TEPs. When appropriate, the developer may consider using an alternative structure such as a standing TEP.

Selected Best Practices

- Schedule meetings at times that are convenient for participants
- Ensure participants are well prepared for the meeting
- Provide read-ahead materials that are easy to understand
- Develop clear discussion questions
- Communicate with participants between meetings

TEP Recruitment and Composition

- Distribute the call for TEP nominations widely to promote participation from a broad range of relevant experts and stakeholders. TEP members should reflect diversity in terms of background, experience, geography, affiliation, and point of view.
- To encourage patient and caregiver participation, distribute the call for TEP nominations through patient and caregiver advocacy organizations. TEPs should include a patient or caregiver representative to ensure the consideration of quality issues important to patients. Additionally, having at least two such individuals on a panel may help individuals feel more comfortable participating in the discussion.
- Clearly describe how issues of confidentiality (particularly patient confidentiality) will be handled and explain the options which patients and caregivers may choose from to protect their confidentiality. These issues should be covered in the TEP charter and in other materials as applicable.
- Write the call for TEP nominations notice in plain language that non-expert participants can understand. Ensure that all posted materials are accessible to potential members with varied backgrounds and experiences.

Meeting Preparation

- Consider convening the TEP at key points during the development process—beginning shortly after completing early conceptualization activities (environmental scan, literature review)—to ensure that TEP members are involved on the "ground level" and that their feedback is received in time to make a difference.
- Ensure participants are well prepared for the meeting. For patient/caregiver participants, this may involve establishing a staff mentor to provide additional background information on meeting materials in advance of the TEP meeting.
- Provide read-ahead materials that are easy to understand.
- Communicate with participants between meetings.
- Develop clear discussion questions.

Meeting Implementation

- The TEP coordinator should present information in an easy-to-understand format to assist members who may be less knowledgeable about measure development, medical terminology, or other relevant topics.

- The chair or meeting facilitator should have strong facilitation skills and strive to engage all TEP members in the conversation.
- Use graphs and other visual aids whenever possible.
- Provide recommendations from the team and seek feedback (rather than asking the TEP to come up with recommendations from scratch).
- Carefully consider patient/caregiver ideas, comments, and points of view.

For more information on the topic of Technical Expert Panels, please refer to the MMS Blueprint (Chapter 12: Technical Expert Panels).