

Attachment A: Pre-Workflow Toolkit Interview Guide - Practice

[Note: This is the semi-structured interview protocol for the baseline interview with practices.]

Interview Date: _____

Clinic: _____

_____ CLINICIAN

_____ NURSES & OFFICE STAFF

_____ OFFICE MANAGER

_____ HEALTH EDUCATOR/QUALITY DIRECTOR

_____ INFORMATION TECHNOLOGY SPECIALIST

Facilitator: _____

Note Taker: _____

Recording Information/Record: _____

I. Introduction

Thank you for taking the time to meet with me today. Your participation will help us to understand what tools are most helpful when understanding how to integrate health information technology into clinical workflow. We plan to use this information in the evaluation of a particular Workflow toolkit that we'll describe later. Your feedback will help us improve this toolkit before it is shared widely with other primary care practices. The information that you provide will be kept confidential to the extent permitted by law, as will the identity of practice staff members we interview for this study. Our findings will only be reported for the clinic as a whole, and not for individuals.

With your permission we would like to record this interview, is that okay? [Turn on recording device if approval is received.]

We anticipate this interview will take 30 minutes. Do you have any questions before we begin?

II. Questions

1. What does workflow mean to you?

[Wait]

If you can't define it, can you give me an example of a workflow in your practice?

READ: Our working definition is: Workflow is the sequence of physical and mental tasks performed by various people within and between work environments. It can occur at several levels (one person, between people, across organizations) and can occur sequentially or simultaneously.

Public reporting burden for this collection of information is estimated to average 30 minutes per response, the estimated time required to complete the survey. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: AHRQ Reports Clearance Officer Attention: PRA, Paperwork Reduction Project (0935-XXXX) AHRQ, 540 Gaither Road, Room # 5036, Rockville, MD 20850.

For example, the workflow of ordering a medication includes communication between the provider and the patient, the provider's thought process, the physical action by the provider of writing a paper prescription or entering an electronic prescription into an electronic health record and transmitting the order electronically or having the patient take the prescription to the pharmacy to have the prescription filled.

2. Can you tell me how is understanding workflow important in your practice?
 - a. Can you give me an example of when understanding practice workflow was important in your practice?
 - b. How is workflow important in practice change?
 - c. How is workflow important in health information technology implementation? (health information technology includes new electronic health records, changing your electronic health record, or adding new functionality such as e-prescribing or a patient portal)
3. Describe a workflow in your practice.
Prompt: Describe how a new laboratory report is processed when it is received, or how prescription refill requests are handled.
4. Please think about a time when you implemented a health information technology system in your practice. Health IT systems include new electronic health records, changing your electronic health record, or adding new functionality such as e-prescribing or a patient portal. Can you walk me through the steps that were taken to implement this health information technology system in your practice?
 - a. What happened first?
 - b. What happened next?
 - c. Next?
 - d. How did you know when implementation was complete?
5. Do you have any final comments or questions?

III. Conclusion

Thank you for your time and for helping us to better understand this complex issue.