

## Attachment B: Pre-Workflow Toolkit Interview Guide - REC

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

Interview Date: \_\_\_\_\_

Clinic: \_\_\_\_\_

\_\_\_\_\_ REC TECHNICIAN

\_\_\_\_\_ OTHER

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 Health IT Regional Extension Center or REC staff members we interview for this study. Our findings will only be reported for RECs in general, 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 clinical 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.**

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**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 understanding workflow is important to the work of the REC?
  - a. Can you give me an example of when understanding practice workflow was important to the work of the REC?
  - 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 the electronic health record, or adding new functionality such as e-prescribing or a patient portal)
  
3. Describe a workflow in clinical 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 a practice worked with the REC to implement a health information technology system. Can you walk me through the steps that were taken to implement this health information technology system in the 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.