**Attachment F: Post-Workflow Toolkit Interview Guide - REC**
[*Note: This is the semi-structured interview protocol for the post-evaluation interview.*]

**Interview Date: _____**
**Clinic:  _____**
**_____REC TECHNICIAN**
**_____OTHER**

**Facilitator: _____**
**Note Taker: _____**
**Recording Information/Record: _____**

## I. Introduction

Thank you for taking the time to meet with us today.  You probably know that about 10 weeks ago, this clinic started a project to evaluate a toolkit for assessing workflow, with assistance from yourself and the Health IT Regional Extension Centers or REC.  We're here today to learn what you think about the toolkit, your views about how the Workflow toolkit might help assess clinician workflow and manage the change process in clinics and the use of health information technology, and your thoughts about how the toolkit could be improved.  We know that you have had different levels of participation in the project - and that's fine.  We think each of you have important insights to offer.

We will use your comments, along with those from other practices and RECs, to help improve the Workflow toolkit to make it more useful to small- and medium-sized practices and those who help them implement health IT, such as yourself.  Your responses will be kept confidential to the extent permitted by law.  We will not share your identity or the identity of any REC staff member we interview for this study.  Our findings will only be reported for the RECs in general, and comments will not be linked to specific individuals.

We expect this interview will take 30 minutes.  The first part of the interview will be in person and the second part will be at your computer. With your permission we would like to record this interview, is that okay? [*Turn on recording device if approval is received*.]

Do you have any questions before we begin?

## II. Change in knowledge and attitudes

1.  What does workflow mean to you?

    READ: **Our working definition is that 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.**

**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. Thinking of your use of the Workflow toolkit, how has your understanding of workflow changed during this project?
   Prompt: For example, the importance of workflow for practice change or innovation?
   Prompt: For example, the importance of workflow for implementing computer technology?

3. How has your understanding of the importance of assessing workflow changed?
   Prompt: In practice change or innovation?
   Prompt: In health information technology implementation?

**III. Overall impressions about usefulness of Workflow toolkit and suggested changes**

*Note: This portion may be conducted individually or in two- or three-person group interviews, depending on availability. Target those individuals who primarily use the Workflow toolkit.*

READ: **For the next set of questions, we would like you to show me how you used the toolkit. Let's move to a computer and you can walk me through some next steps.**

4. Describe workflows the practice(s) talked about.
   Prompt: For example how a new lab report is handled when it is received, or how prescription refill requests are handled.

5. Walk me through how you used the Workflow toolkit with the practice(s).

6. What changes would you suggest to improve the Workflow toolkit?
   a. What changes to the tools in the toolkit?
   b. What changes to the toolkit itself?

7. What final comments or questions do you have about the workflow toolkit?

## III. Conclusion

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