Attachment A: Observation Guide

The purpose of the non-participant observations is to provide contextually rich details on the overall characteristics of clinical workflow *before*, *during*, and *after* a major health IT implementation in a diverse set of outpatient care settings undergoing practice redesign. These observations will inform the overall study results and will be particularly useful in adding contextual detail and richness to the overall data set.

During the observations, you should pay particular attention to the following activities:

- The clinical workflow of the individual being observed, noting body language, verbal statements and other physical cues when possible.
- The flow of information to and from this individual, noting emphases placed on certain information types or information sources.
- The types of information this individual uses in their work, noting when information is unavailable or difficult to locate or readily available. Be sure to include information from other individuals, including patients.
- The people this individual interacts with during their work (both inside and outside of the clinic), noting the intensity or centrality of these interactions.
- The health IT devices this individual uses and what they are typically used for. Be sure to observe for *all* health IT, not just the health IT being implemented as part of the study.

As you are in the clinic sites, you should not interfere with clinic members' work. The work of the clinic *always* takes priority over study activities. As detailed in your training, non-participant observation is an intense data collection activity and should be approached as such. When you are not observing an individual, you should work on writing your up field notes. You should aim to complete your field notes as much as possible at the study site between observations and finalize field notes on the same day that the observations occur. Your typical day will consist of two half-day observation sessions, allowing approximately 50% of your time for field note documentation and addressing logistical matters (e.g., ensuring that an adequate and representative set of individuals are being observed, allowing time for RAs to organize their work, adjusting for unforeseen contingencies that might arise). An estimated 45 individuals per organization (Billings Clinic and Cabin Creek) will be observed in each observation period, for a total of 90 individuals for each of the pre-, during- and post-implementation observations. All field notes should be kept confidential and secure.

Please use the following template to guide your data collection activities during this study component. If questions arise, please contact your site coordinator or Dr. Lanham at 512.970.0971 or Dr. Zheng at 412.708.2202.

Date/Time: _____ Clinic ID: _____

RA name: _____ Participant ID: _____

Observations	**Interpretations**
Needs clarification:	*Questions for investigator team:*