ATTACHMENT C

Practice Tour Guide

Observer/Interviewer instructions: Please focus on the use of health IT, in particular how the practice uses patient-reported information, and how it impacts the workflow in the practice and in the different phases of a patient visit to his/her doctor. Note whether it affects the environment; the people, and the tasks they perform; and possible changes to the organization of work. Also note what tools and technology are involved.

Can you please walk us through a patient visit in the practice?

During the walk-through, can you explain what different kinds of *health IT you use and, in particular, health IT that patients can use to provide information or communicate with their care team*?

Let's start with the reception, then the intake and waiting room and, finally, the exam rooms. While we do the tour, can you please describe how health IT is used and, in particular, health IT that allows patients to provide medical or health information?

- Do you use ***patient portals*** (sometimes referred to as [electronic] personal health records or PHRs; allow patients to view portions of their medical records [e.g., laboratory test results] and support other health-related tasks such as making appointments or requesting medication refills. Some patient portal applications exist as stand-alone Web sites; other portal applications are integrated into an existing electronic health record [EHR] system) in your practice?
- If yes:
    o How do patient portals fit in the patient's journey? (What happens with information? How is it used?)
    o How do patient portals affect the workflow of the employees in your practice?

- Do you use ***secure messaging*** with patients (use of secure e-mail between patients and clinicians, typically using the secure messaging functionality in the EHR and/or patient portal) in your practice?
- If yes:
    o How does secure messaging fit in the patient's journey? (What happens with information? How is it used?)
    o How does secure messaging affect the workflow of the employees in your practice?

- Do you use *e-forms* (surveys that are administered using computerized media [e.g., tablets, laptops] to collect information from patients using pre-formatted forms before or during patient visits) in your practice?
- If yes:
    o How do e-forms fit in the general patient journey? (What happens with information? How is it used?)
    o How do e-forms they affect the workflow of the people in the practice?

Many thanks for your cooperation!