

Attachment I: Workflow Mapping Preliminary Interview Guide

OVERVIEW:

The purpose of the workflow mapping preliminary interviews is to engage staff from the primary care site to describe what the workflow map might look like, setting a foundation for the workflow mapping group interview (see Attachment J). The investigators will use the findings from these interviews to outline a preliminary workflow map to bring to the subsequent work flow process meeting. Collecting this information individually will help to capture each participant's unique perspectives regarding the workflow at their clinic.

PARTICIPANTS:

Respondents will include primary care staff available at nine different primary care sites. JSI anticipates the participation of eight individuals at each primary care site who will represent a variety of roles such as primary care providers (PCPs), nurse practitioners (NPs), physician assistants (PAs), registered nurses (RNs), licensed practical nurses (LPNs), pharmacists, behavioral health providers, community health workers, and office staff. The participating staff will be based on the staffing of the clinic and their availability to participate.

MATERIALS:

In order to complete the data collection instrument, each participant will be provided the Project Summary for the Re-engineered Visit for Primary Care (AHRQ REV). The interviewers will have the data collection instrument and laptop for interviewer note taking.

INSTRUMENT AND ADMINISTRATION:

The site investigator will conduct brief, one-on-one interviews with primary care staff. Another member of the research team will take notes during these interviews. The interviews are designed to understand the following:

- Role and workflow description - What are the primary care staff's responsibilities to assist hospitalized patients over four time periods: during hospitalization, between hospitalization and the primary care visit, during the primary care visit, and after the primary care visit?
- Consistency of steps in the workflow – To what extent are transitional care activities implemented in the same way for all hospitalized patients?
- Barriers and challenges – What barriers or challenges do staff encounter when implementing transitional care-related duties?

A combination of general and specific probes will be used to explore participants' perceptions of each of these topics. Some examples of such probes include:

- Role and workflow description
 - o What is your role in the clinic?
 - o What are the key tasks you are responsible for with regard to recently hospitalized patients? Can you describe these tasks during hospitalization, between the hospitalization and primary care visit, during the primary care visit, after the primary care visit?
 - o What are the specific steps in [TASK]?
- Consistency of steps in the workflow
 - o Does this vary by patient group (e.g. in network versus out of network, high-risk patients)? In what way?
 - o Is there someone dedicated to [doing TASK]?
 - o Does everyone in your role [perform TASK] the same way? How reliable is this [TOOL/PROCESS]?
 - o How do you get the information you need to [perform TASK]?
 - o Are you able to accomplish [TASK] within the allotted timeframe?
- Barriers and challenges
 - o What are the barriers you experience in accomplishing [TASK]? Are there issues particularly to completing the task effectively, reliably, and on-time?
 - o Is the [TOOL/PROCESS] adequate?

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