

Attachment J: Workflow Mapping Group Interview Guide

OVERVIEW:

The purpose of the workflow mapping group interview is to bring primary care staff together in a group meeting to further define a model of the transitional care activities that take place in their clinic.

PARTICIPANTS:

Respondents will include primary care staff available at nine different primary care sites. John Snow Inc. (JSI) anticipates the participation of ten 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 staff participants will be based on the staffing of the clinic and their availability to participate. Some of these staff may overlap with those staff involved in the workflow mapping preliminary interviews.

There will be no effort to recruit staff based on previous research participation or lack thereof; recruitment will be based on diversity of staff role type and availability.

MATERIALS:

Participants will be provided the Project Summary for Re-engineered Visit for Primary Care (AHRQ REV). Additional materials include data collection instruments to be used by interviewers, laptop for interviewer note-taking, and whiteboard/flipchart to be used by facilitator with the research participants.

INSTRUMENT AND ADMINISTRATION:

A project investigator will facilitate the workflow mapping with the group of primary care staff. The group interview will be a collaborative, iterative process to further define the workflow processes involved in planning for and executing post-hospital follow-up services. These processes will be mapped on a whiteboard or flipchart during the group interview for visual reference.

After introducing the purpose of the group interview and thanking the collective staff for their participation in the preliminary interviews, the project investigator will begin by describing the research team's understanding of the transitional care activities at the site. These activities are likely to include, at minimum, the following:

- Transitional care activities during hospitalization are likely to include:
 - o Receiving notification about hospitalization.
- Between hospitalization and the primary care visit are likely to include:
 - o Scheduling a primary care follow-up appointment; and
 - o Receive a discharge summary from the hospital.
- During the primary care visit are likely to include:
 - o Review of the discharge summary;
 - o Readmission risk assessment;
 - o Medication review and reconciliation;
 - o Patient and family education on steps for self-care;
 - o Review of what to do if symptoms recur;
 - o Review of required tests/studies in follow-up and specific process for scheduling; and
 - o Coordination and/or communication with specialists, including behavioral health.
- After the primary care visit are likely to include:
 - o Phone call to patients; and
 - o Other follow-up care to patients.

The questions in the group interview are designed to align and clarify how the primary care staff view the transitional care activities at their clinic. A combination of general and specific probes will be used to help develop the workflow map.

Some examples of such probes include:

- Does that look/sound like an accurate description of what happens (during hospitalization, between hospitalization and the primary care visit, during the primary care visit, and after the primary care visit)?
- Can you please describe [TASK] in more detail?

Does the process for [TASK] vary depending on where the patient was hospitalized?

- Do all [STAFF ROLE] perform this task in the same way?
- How often does [TASK] happen? For what percentage of patients?
- What happens after [TASK]? Does it always happen? Who does this?

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