

Integrated Care Coordination Information System Interview Guide

Oregon Health and Science University, Portland OR

This is an interview guide designed to be conducted with nurses in an ambulatory setting. The tool includes questions to assess user's perception of electronic health records.

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ICCIS Care Manager Interview

1) Describe, as you see it, the ideal role of a care manager.

- Prompt: How does your role differ from the ideal?
- Prompt: How do you add value to patients? to other members of the care team (including physicians)?
- Prompt: What do you believe are the *advantages and challenges* of a clinic having a care manager?

2) What do you enjoy about being a care manager? What are the negatives?

- Prompt: how much of your time is spent doing care management activities versus traditional clinical nursing activities?
- Prompt: In your ideal role, how much of your time would be spent in care management? How much in other nursing activities? Why?
- Prompt: As a care manager, are there groups or individuals whose values support your role? Who are they? Are there conflicts? With whom and why?

3) How are patients assigned to you?

- Prompt: What is the basis for a referral? What are the characteristics of a good referral? An inappropriate referral?
- Prompt: Can you describe your relationships with the physicians/other team members?

4) How do you prioritize your patients' needs?

- Prompt: Your patients are complex and face many issues: how do you prioritize?
- Prompt: To what degree do your clinic's population-focused initiatives affect your choices?
- Prompt: How much of your role is focused on the overall health of the clinic patients and how much is focused on your patients individually?
- (only if necessary) For example, if a diabetic patient needs an A1c, a flu shot, a depression screen, information about their insulin, and smoking cessation information, how do you decide what to go after first? Does your clinic have initiatives that would affect your decision?

5) Does reimbursement affect your care management activities?

- Prompt: What do you believe are the *advantages and disadvantages* of receiving pay for individual care management activities vs. receiving fixed fees per patient per month?
- Prompt: Are you aware of the ICCIS study reimbursement system? Do you know which activities it reimburses you for?

6) How do IT tools affect your care management activities?

- Prompt: What do you believe are the *advantages and disadvantages* of documenting information and activities in ICCIS as opposed to documenting them in (name of their EHR)?
- Prompt: What factors or circumstances *enable you or make it difficult for you* to document care management information and activities in ICCIS? What about in (name of their EHR)?

- Prompt: Do you use any other IT to track or care manage your patients? If so, why and how?
 - (only if necessary) For example: outlook, excel, other databases, etc
 - Prompt: Do you use any other work flow adaptations to track your patients or meet the goals of the ICCIS study? If so, why and how?
 - (only if necessary) For example: blue sheets, Solutions, Crystal, etc
- 7) What IT functionalities make documenting and sharing your care management activities easier?**
- Prompt: Which ICCIS features are least useful? Which are most useful?
 - Prompt: What additional new features would be most useful?
- 8) Are there any *other issues* that come to mind when you think about documenting information and activities in ICCIS?**
- 9) Overall: how do you think implementation of the Care Management Plus system worked for your clinic?**
- Prompt: What advice or input would you like to share with the Care Management Plus project staff regarding what has worked well and what could be done differently in the implementation of this program?
- 10) What three changes would make you more effective as a care manager?**
- Prompt: What are the barriers to effective care?
 - Prompt: What would be different if these changes were made?
- 11) Does your clinic intend to continue its care management program? Why or why not? If so, how do you plan to document its activities?**

MD Interview

- 1. What are the current barriers to effective care, especially for the chronically ill, for you and the clinic?**
 - Prompt: How does your clinic's care manager help address these needs?
- 2. Describe the real and the ideal role of a care manager.**
 - Prompt: What do you believe are the *advantages and challenges* of a clinic having a care manager?
 - Prompt: How does a care manager add value to your patients? To other members of the clinical team?
- 3. Describe your clinic's efforts to incorporate the care management program into your office practice routine.**
 - Prompt: How often do you engage with your care manager?
 - Prompt: Are there groups or individuals who support this project? Are there conflicts?
- 4. How do you assign patients to your care manager?**
 - Prompt: What is the basis for a referral? What are the characteristics of a good referral? An inappropriate referral?
 - Prompt: To what degree do your referrals reflect your clinic's population-focused initiatives? To what degree are they focused on your patients' individual needs?
- 5. Does reimbursement affect your clinic's care management activities?**
 - Prompt: Are you aware of the ICCIS study reimbursement system? Do you know which activities it reimburses you for?
 - Prompt: What do you believe are the *advantages and disadvantages* of fee-for-service reimbursement (vs per member per month)?
- 6. Are you satisfied with the IT tools used to track care management activities?**
 - Prompt: what systems do you use? How do you learn about a patient's care management activities?
 - Prompt: Have you used the ICCIS application?
 - Prompt (if yes): What do you believe are the *advantages and disadvantages* of documenting information and activities in ICCIS vs. documenting them in your EHR?
 - Prompt (if yes): Which ICCIS features are least useful? Which are most useful?
 - Prompt (if yes): What additional new features would be most useful?
- 7. Overall: how do you think implementation of the Care Management Plus system worked for your clinic?**
 - Prompt: What advice or input would you like to share with the Care Management Plus project staff regarding what has worked well and what could be done differently in the implementation of this program?
- 8. What three changes would make your care management program more effective?**
 - Prompt: What are the barriers to effective care? What would be different if these changes were made?

9. Does your clinic intend to continue its care management program? Why or why not? If so, how do you plan to document its activities?

Office Manager Interview

- 1. What are the current barriers to effective care, especially for the chronically ill, for you and the clinic?**
 - Prompt: How does your clinic's care manager address their needs?
- 2. Describe the real and the ideal role of a care manager.**
 - Prompt: What do you believe are the *advantages and challenges* of a clinic having a care manager?
 - Prompt: How does a care manager add value to patients? To other members of the clinical team?
- 3. Describe your clinic's efforts to incorporate the care management program into your office practice routine.**
 - Prompt: Are there groups or individuals who support this project? Are there conflicts?
- 4. Does reimbursement affect your clinic's care management activities?**
 - Prompt: Are you aware of the ICCIS study reimbursement system? Do you know which activities it reimburses you for?
 - Prompt: What do you believe are the *advantages and disadvantages* of fee-for-service reimbursement (vs per member per month)?
- 5. Are you satisfied with the IT tools used to track care management activities?**
 - Prompt: What IT systems do you use? How do you learn about a patient's care management activities?
 - Prompt: Are you familiar with ICCIS?
 - Prompt (if yes): What functionalities of the system have you used? How often have you used them?
- 6. Overall: how do you think implementation of the Care Management Plus system worked for your clinic?**
 - Prompt: What advice or input would you like to share with the Care Management Plus project staff regarding what has worked well and what could be done differently in the implementation of this program?
- 7. What three changes would make your care management program more effective?**
 - Prompt: What are the barriers to effective care? What would be different if these changes were made?
- 8. Does your clinic intend to continue its care management program? Why or why not? If so, how do you plan to document its activities?**