

## Case Manager Interview Guide

Type of case manager:    KBC Inpatient       KBC Outpatient       KBC TOCC  
    GHP Clinic               GHP SNF               Other: \_\_\_\_\_

Day of interview: \_\_\_\_\_

Gender:       Male               Female

Time of interview:    Beginning: \_\_\_\_\_    End: \_\_\_\_\_

Total duration of interview: \_\_\_\_\_

Interviewers (circle initials):      PC      PH      BA      ASH      RC

**Please note: these questions are open-ended to encourage the respondent to discuss topics related to the study. In such discussions, additional questions and prompts may be used to encourage the respondent to fully explain his or her answer. These questions and prompts include “Can you tell me a bit more?” “I’m not sure I quite understand about [repeat respondent’s words],” “You said [repeat respondent’s words], could I ask you a bit more about that?” or “Could you explain more about what you meant in saying [repeat respondent’s words].”**

### **Introduction:**

In collaboration with Geisinger Health System, our research team at the University of Wisconsin received a grant from the Office of the National Coordinator for Health Information Technology to evaluate the implementation of the health information exchange and the medical home model.

You are being invited for this study because you are a case manager and we are interested in your work activities as they relate to the medical home model. Participation in this study is voluntary. You may change your mind at any time and discontinue your participation in this study. [Hand out another copy of the information sheet to the case manager, if s/he would like to see one.]

There is minimal risk associated with this interview. No identifying information will be collected. Only researchers associated with this project will have access to the information gathered.

Do you have any questions about the study? Are you willing to proceed with the interview?

Do you mind if I audiotape the interview?

# Case Manager Interview Guide

## 1. Background

### 1.1. General background information.

- What is your background? Can you tell us about your work experience?
- Do you have any previous experience as a case manager? YES/NO If yes, please explain what you did.

### 1.2. Preparation for becoming a KBC/GHP case manager.

- Why did you decide to apply for a KBC/GHP case manager position?
- How long have you been working as a KBC/GHP case manager?
- What training did you receive? (methods and duration of training: professional, KBC training, & on the job)
- What about your training do you think went very well?
- What about your training would you improve or do differently?
- How prepared did you feel when you started as a case manager?

## 2. Typical Shift

### 2.1. Typical shift.

- What is your typical work schedule?
- How do you organize your work shift? (Do you more or less have a work routine?)
  - What happens when you arrive?
  - What happens when your shift ends?
- Do you organize your work the way you were trained or by personal preference?
- How many patients do you typically monitor each day? What types of patients?
- How do you get notified about a specific patient? Is there any difference in how you get notified based on patient type (e.g., diagnosis, surgery, payor)? If yes, please explain.

**→Tools/Software**

## Case Manager Interview Guide

### 3. Tools/Software

#### 3.1. Case Management software (e.g., Wisdom).

- Describe how you use the Case Management software.
- What about it is easy to use? Why? – Could you give us specific examples?
- What about it is difficult to use? Why? – Could you give us specific examples?

#### 3.2. Case Management software support for tasks related to monitoring complex patients

- How does it help or hinder your ability to monitor complex patients?
- Could you give us specific examples?

#### 3.3. Are there any other software or technologies that you use?

- Describe how you use them.
- What are the pluses and minuses of these software?
- Do these software help or hinder your ability to do your job? How?

**→ Work System Obstacles and Facilitators**

## Case Manager Interview Guide

### 4. Work System Obstacles and Facilitators

4.1. Please think of instances when you feel your performance was challenged or below par due to problems in your “work system”. These instances may have been related to [*present the list on a card*]. For example, when you perform medication reconciliation, what can occur (or not occur) that can interfere with your ability to efficiently and accurately perform medication reconciliation?

- Workspace or work environment.
- Resources (e.g., equipment, internet access, other workers).
- Information.
- Interactions with patients/family.
- Work schedule.
- Training.
- Policies and procedures..
- Goals and expectations.
- Other \_\_\_\_\_
- Please briefly describe any such instance(s) you experienced by explaining the situation and what you think caused it. You may refer to the list above or identify other causes not listed.**

4.2. Please think of instances when you are able to perform your job very well.

These instances may have been related to [*present the list on a card*]: For example, when you perform medication reconciliation, what might occur (or not occur) helps you efficiently and accurately perform medication reconciliation?

- Workspace or work environment.
- Resources (e.g., equipment, internet access, other workers).
- Information.
- Interactions with patients/family.
- Work schedule.
- Training.
- Policies and procedures..
- Goals and expectations.
- Other \_\_\_\_\_
- Please briefly describe any such instance(s) you experienced by explaining the situation and what you think caused it. You may refer to the list above or identify other causes not listed.**

→Impact on Patient Care and Conclusions

## Case Manager Interview Guide

### 5. Impact on patient care

5.1. What do you think is your role in influencing patient care? / How does your role influence patient care?

- For KBC case managers, ask about each of the following patient groups:*
  - HF patients
  - COPD patients
  - Post-surgical patients

### 6. Conclusion

**I have a few wrap-up questions.**

- What could be done to make your job easier?
- Would access to any tools, software, or technologies make your job easier? (e.g., network access)? What would it provide?
- What else do you think I should be asking you?
- Would you like to add anything else to our discussion?

If, when I review my notes I think of something I should have asked you or need clarification on, do you mind if I contact you? How should I contact you, by email or phone?

**Thank you for your participation!**

When utilizing this document please cite:

1. Hundt, A.S., Carayon, P., Alyousef, B., Cartmill, R.S., Hoonakker, P., Kianfar, S., Tomcavage, J., Salek, D., Petrucci, J., & Walker, J. (2014). Community ergonomics applied to the implementation of a region-wise care coordination program. Proceedings of the 11th International Symposium on Human Factors in Organizational Design and Management (ODAM) Copenhagen, Denmark. pp. 475-480.