Care Manager Survey

Final Version September 7, 2011

We appreciate the time you are taking to complete this questionnaire and hope that the information will help us better understand how new technology influences people.

Instructions

When completing the questionnaire, you can leave blank any questions that you do not want to answer. Remember that your responses are strictly confidential and will be closely guarded. This questionnaire has been designed to gather information about the work you do, the technology you use, and your quality of working life. Please try to answer all of the questions.

To answer the questions, check the appropriate box on the scale. For example:

	Never			It varies			Always
SoftwareName has a negative impact on patient care.	$\square_1$	$\square_2$	$\boxtimes_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$

Some questions will require answers similar to the scale above, while other questions will require different responses. Please try to be as accurate as possible.

Section A. About your job…

1. Please check your current job position: [WBS: Branch: 1,2,3 SKIP Section D, 4: responds to D, see flowchart]

$\square_1$ Beacon Inpatient care manager	$\square_2$ Beacon Community care manager	$\square_3$ Beacon Transition of Care (TOC) care manager	$\square_4$ Medical home case manager	$\square_5$ Community case manager

2.   What software do you currently use? [WBS: Branch: 1: Section B; 2: KeyHIE, 3 and 4: SKIP section B & C (see Flowchart last page of this document)]
(Please check all that apply)

$\square_1$ Wisdom $\square_2$ KeyHIE $\square_3$ EHR $\square_4$ Other

3. How long have you been in this position?   _____ years   _____ months

4. Do you have any prior experience as a case manager? If yes…   _____ years   _____ months

5. With what percentage of your patients do you communicate by email (all e-mail systems: Outlook, Groupwise, MyGeisinger, EPIC, Patient Portal, KeyHIE, etc.)

$\square_1$ None	$\square_2$ 1-10%	$\square_3$ 11-25%	$\square_4$ 26-50%	$\square_5$ More than 50%

6. How many hours do you work at your job in an <u>average</u> week?   _____ hours per week

Section B. About Wisdom

B1. Please check the box that best reflects your <u>acceptance</u> of Wisdom:

Dislike very much and
don't want to use

Like very much and
eager to use

☐₁　　☐₂　　☐₃　　☐₄　　☐₅　　☐₆　　☐₇　　☐₈　　☐₉　　☐₁₀

Please rate the following characteristics of WISDOM.

B2. Learning to operate the system	Difficult	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Easy
B3. Exploring new features by trial and error	Difficult	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Easy
B4. Remembering names and use of commands	Difficult	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Easy
B5. Tasks can be performed in a straightforward manner.	Never	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Always
B6. Help messages on screen	Unhelpful	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Helpful
B7. Supplemental reference/training materials	Confusing	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Clear
B8. Experienced and inexperienced users' needs are taken into consideration	Never	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Always
B9. Correcting your mistakes	Difficult	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇	☐₈	☐₉	☐₁₀	Easy

The following questions ask specifically <u>about WISDOM</u>. Based on your experience, please indicate whether the following statements about WISDOM are true.

	Never			It varies			Always
B10. The *WISDOM* system is reliable – it does its job consistently.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B11. *WISDOM* improves my productivity.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B12. *WISDOM* has a negative impact on patient care.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B13. *WISDOM* reduces patient care errors.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B14. The *WISDOM* system is easy to use.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B15. I feel I had adequate training on *WISDOM*.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B16. *WISDOM* improves the quality of patient care.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B17. System response time on *WISDOM* is slow.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B18. When I have a problem with *WISDOM*, I just ask someone for help.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B19. I feel that I can benefit from refresher classes on *WISDOM*.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B20. When I need help on *WISDOM*, I can find it.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇
B21. Overall, *WISDOM* improves the safety of care I provide.	☐₁	☐₂	☐₃	☐₄	☐₅	☐₆	☐₇

	Never			It varies			Always
B22. Overall, *WISDOM* saves me time.	$\Box_1$	$\Box_2$	$\Box_3$	$\Box_4$	$\Box_5$	$\Box_6$	$\Box_7$
B23. Data I retrieve from WISDOM does make an impact on my decision-making	$\Box_1$	$\Box_2$	$\Box_3$	$\Box_4$	$\Box_5$	$\Box_6$	$\Box_7$
B24. Overall, I am satisfied with the *WISDOM* system.	$\Box_1$	$\Box_2$	$\Box_3$	$\Box_4$	$\Box_5$	$\Box_6$	$\Box_7$

B25. What are the three things you like most about *WISDOM*?

B26. What are the three things you would like to change about *WISDOM* to make it better?

Section C. About Health Information Exchange (KeyHIE)…

	Never (SKIP to C1b)	A few times a year or less, almost never	Once a month or less, rarely	A few times a month, some-times	Once a week, rather often	A few times a week, nearly all the time	Every day
C1a How often do you use KeyHIE?	$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$

C1bWhy do you not use KeyHIE (Please check all that apply)?

a. I was never informed about KeyHIE	$\square_1$
b. I do not think the information in KeyHIE is very useful for me	$\square_1$
c. KeyHIE is too complicated to use	$\square_1$
d. I do not have enough time to use KeyHIE	$\square_1$
e. Using KeyHIE does not fit into my workflow	$\square_1$
f. Other…	$\square_1$

SKIP to SECTION E

C2. How long have you used KeyHIE?   …….year(s)   ……..month(s)

C3. Did you receive training on the use of KeyHIE? $\square_1$ Yes $\square_2$ No *(go to Question C4)*

	Poor	Fair	Good	Very good	Ex-cellent
C3a. Overall, how would you rate the training you received for keyHIE?	$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$

C4. When your own paper or electronic records do not contain all the information you need about a patient, how do you find what you need? (Please check all that apply)
- ○   Telephone other health care providers
- ○   Telephone community resources
- ○   Telephone (community) pharmacy
- ○   Seek other provider or facility paper records/faxes
- ○   Link to a Health Information Exchange
- ○   Link directly into another EHR
- ○   Proceed with whatever information the patient, family or others can provide
- ○   Other (specify)_____

The next questions are about the use of KeyHIE and its usefulness

C5. For what percent of patients do you check KeyHIE for records?	___ %	$\square_1$ Check here if your HIE is not operational
C6. Of the patients you check KeyHIE, for what percentage do you find the patients you are looking for?	___ %	$\square_1$ Check here if your HIE is not operational

C7. For what percent of those patients that you locate in KeyHIE do you find useful patient information? ___ %   □₁ Check here if your HIE is not operational

C8. Please check the box that best reflects your <u>acceptance</u> of KeyHIE:

Dislike very much and
don't want to use

Like very much and
eager to use

| □₁ | □₂ | □₃ | □₄ | □₅ | □₆ | □₇ | □₈ | □₉ | □₁₀ |

C9. <u>Currently,</u> the KeyHIE Website for clinicians (the portal for physicians, nurses, case managers, etc.) ~~in KeyHIE~~ contains different kinds of information. How <u>important</u> is that information to you?

	Hardly or never use it	Use it sometimes	Use it very often	Not Important	Somewhat Important	Very Important
a. Patient History and Physicals (H&Ps)	□₁ SKIP	□₂	□₃	□₃	□₂	□₃
b. Discharge Summaries	□₁ SKIP	□₂	□₃	□₃	□₂	□₃
c. Lab Results	□₁ SKIP	□₂	□₃	□₃	□₂	□₃
d. Radiology Reports	□₁ SKIP	□₂	□₃	□₃	□₂	□₃
e. Patient Demographics	□₁ SKIP	□₂	□₃	□₃	□₂	□₃
f. Outpatient Notes	□₁ SKIP	□₂	□₃	□₃	□₂	□₃

	Usually incomplete	It varies	Usually complete	Do not know
C10. What do you think about the <u>completeness</u> of the information in KeyHIE?	□₁	□₂	□₃	□₃

	Very Inaccurate	It varies	Very accurate	Do not know
C11. What do you think about the <u>accuracy</u> of the information in KeyHIE?	□₁	□₂	□₃	□₃

C12. What are the three things you like most about *KeyHIE*?

C13. What are the three things you would like to change about *KeyHIE* to make it better?

Section D. About future Health Information Exchange (KeyHIE) functions and information…

D1. In the near future (within the next two years), more information will be added to KeyHIE. How important will the following KeyHIE functions be to you? For GHP and PGP CM only (QA1 = 4 or 5); KBC CM (1-3) skip to Section E.

	Not Important	Somewhat Important	Very Important
a. Problem List	☐1	☐2	☐3
b. Medication List	☐1	☐2	☐3
c. Allergies	☐1	☐2	☐3
d. Consult Reports	☐1	☐2	☐3
e. Secure e-Messaging between providers	☐1	☐2	☐3
f. ED Summaries	☐1	☐2	☐3
g. EKGs	☐1	☐2	☐3
h. Pathology Reports	☐1	☐2	☐3
i. Care Plans	☐1	☐2	☐3
j. Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs)	☐1	☐2	☐3
k. Nursing Home Assessments	☐1	☐2	☐3
l. Post-Discharge Level of Care	☐1	☐2	☐3
m. Home Health Assessment	☐1	☐2	☐3

D2. In the long term future (2013 and later), more information may be added to KeyHIE. How important would the following types of information be to you?

	Not Important	Somewhat Important	Very Important
a. Radiology Images	☐1	☐2	☐3
b. Immunization Records	☐1	☐2	☐3
c. Reminders for preventive and other interventions (e.g. LDL check)	☐1	☐2	☐3

	Not Important	Somewhat Important	Very Important
d. Advanced Directives	$\square_1$	$\square_2$	$\square_3$
e. Patient preferences (language, religion)	$\square_1$	$\square_2$	$\square_3$
f. Family History	$\square_1$	$\square_2$	$\square_3$
g. Family and Social Supports	$\square_1$	$\square_2$	$\square_3$
h. Insurance Information	$\square_1$	$\square_2$	$\square_3$
i. Medication History	$\square_1$	$\square_2$	$\square_3$
j. Other, please specify ……………………………	Text-box		

D3. The KeyHIE Website for **patients** will also contain different kinds of information and services. How important is that information and services to you, as a care manager?

	Not Important	Somewhat Important	Very Important
a. Secure e-Mail	$\square_1$	$\square_2$	$\square_3$
b. Patient access to their electronic healthcare records	$\square_1$	$\square_2$	$\square_3$
c. The patient being able to enter data in KeyHIE (for example, their medication list)	$\square_1$	$\square_2$	$\square_3$

Section E. About barriers in your work…

E1. How much of a barrier is each of the following aspects when it comes to the use of *multiple information systems* (local EHRs, EPIC, KeyHIE, WISDOM) in your work?

		Not a barrier	Minor barrier	Major barrier
a.	Remembering usernames and passwords	$\square_1$	$\square_2$	$\square_3$
b.	Computer skills of you and/or your colleagues	$\square_1$	$\square_2$	$\square_3$
c.	Lack of training in the different systems	$\square_1$	$\square_2$	$\square_3$
d.	Lack of computer support for the different systems	$\square_1$	$\square_2$	$\square_3$
e.	Inefficient use of the systems, such as duplicate data entry, because not all the systems are connected	$\square_1$	$\square_2$	$\square_3$
f.	Finding out whether the patient has given universal authorization to transfer his or her data to other information systems	$\square_1$	$\square_2$	$\square_3$
g.	Identifying patients in the system that are eligible for case management	$\square_1$	$\square_2$	$\square_3$
h.	Finding the most accurate patient information in the information system(s) (EHR, KeyHIE, etc.)	$\square_1$	$\square_2$	$\square_3$
i.	Finding the patient's up-to-date contact information in the information system(s)	$\square_1$	$\square_2$	$\square_3$
j.	Finding the correct information to perform a medication reconciliation in the information system(s)	$\square_1$	$\square_2$	$\square_3$
k.	Finding psycho-social background information about the patient in the information system(s)	$\square_1$	$\square_2$	$\square_3$
l.	Finding information about the patient's family background in the information system(s)	$\square_1$	$\square_2$	$\square_3$
m.	Finding and retrieving information that other case managers have created in WISDOM	$\square_1$	$\square_2$	$\square_3$
n.	Using WISDOM to cover for co-workers during their absence and/or re-assignment of case load	$\square_1$	$\square_2$	$\square_3$
o.	Documenting in WISDOM	$\square_1$	$\square_2$	$\square_3$
p.	Transferring data from EPIC or KeyHIE to WISDOM or vice versa	$\square_1$	$\square_2$	$\square_3$

Section F. About your perceptions of work and quality of working life…

F1. How satisfied are you with the care you provide?	totally dissatisfied	$\square_1$ $\square_2$ $\square_3$ $\square_4$ $\square_5$ $\square_6$ $\square_7$	completely satisfied
F2. How would you rate the quality of care you provide?	lowest	$\square_1$ $\square_2$ $\square_3$ $\square_4$ $\square_5$ $\square_6$ $\square_7$	highest

The following questions deal with the workload that you experience in your job. Please put an 'X' on each of the following six scales at the point that matches your overall experience of workload.

Low   High

F3. **Mental demand.** How much mental activity is required to perform your job (thinking, deciding, calculating, remembering, looking, searching, etc…)?

F4. **Physical demand.** How much physical activity is required to perform your job (e.g., pushing, pulling, turning, controlling, activating, etc.)?

F5. **Temporal demand.** How much time pressure do you feel due to the rate or pace at which the tasks or task elements occurred?

F6. **Effort.** How hard do you have to work (mentally and physically) to accomplish your level of performance?

F7. **Performance.** How satisfied are you with your performance at your job?

F8. **Frustration level.** How insecure, discouraged, irritated, stressed and annoyed versus secure, gratified, content, relaxed and complacent do you feel about your job?

F9. How many active cases (patients) do you currently manage?   …… cases

F10. All in all, how satisfied would you say you are with your job?

Not at all satisfied	Not too satisfied	Somewhat satisfied	Very satisfied
$\square_1$	$\square_2$	$\square_3$	$\square_4$

F11. How likely is it that you will actively look for a new job in the next year?

Not at all likely		Somewhat likely		Quite likely		Extremely likely
$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$

How often do the following statements describe how you have been feeling as a result of your job?

	Never	A few times a year or less, almost never	Once a month or less, rarely	A few times a month, some-times	Once a week, rather often	A few times a week, nearly all the time	Every day
F12. I feel emotionally drained from my work.	$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$
F13. I feel used up at the end of the workday.	$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$
F14. I feel fatigued when I get up in the morning and have to face another day on the	$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$

job.							
F15. Working all day is really a strain for me.	$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$
F16. I feel burned out from my work.	$\square_1$	$\square_2$	$\square_3$	$\square_4$	$\square_5$	$\square_6$	$\square_7$

Section G. About you…

G1. What is your gender? $\square_1$ Male $\square_2$ Female

G2. What is the highest level of
education you have completed?

- $\square$ High school/GED
- $\square$ Some college
- $\square$ 2-year college degree (Associate)
- $\square$ 4-year college degree (Bachelor, BA, BS, BSN, etc.)
- $\square$ Certified NACCM care manager
- $\square$ Master's degree (MA, MS)
- $\square$ Professional degree (MD, PharmD)
- $\square$ Doctoral degree (PhD, DNP, etc)

G3. How old are you? $\square_1$ 34 or less $\square_2$ 35-44 $\square_3$ 45-54 $\square_4$ 55+

G4. Are you of Hispanic or Latino origin? $\square_1$ Yes $\square_2$ No

G5. What is your racial background? (Check all that apply)
- $\square_1$ American Indian / Alaska Native
- $\square_2$ Asian
- $\square_3$ Native Hawaiian or Other Pacific Islander
- $\square_4$ Black / African American
- $\square_5$ White
- $\square_6$ Other (please specify):_____

G6. How many years of computer experience do you have? _____ years

G7. What description does best
describe the level of your computer
skills?

- $\square$ **Novice user** (You just started using computers)
- $\square$ **Average user** (You use word processors, spreadsheets, e-mail, surf the Web, etc.)
- $\square$ **Advanced user** (You can install software, setup configurations, etc.)
- $\square$ **Expert user** (You can setup operating systems; know some computer programming languages, etc.)

G8 Please write any comments you may want to share with the research team.

I need a new computer!

Thank you very much for your participation in this study.

KBC CM Survey

BEGIN

Section A

Question A1: Current job position

QA2: What software do you currently use?

QA2: 1 but NOT 2

QA2: 2 but NOT 1

QA2: 1 AND 2

QA2: NOT 1 NOT 2

Section B (WISDOM)

Section C (KeyHIE Current)

[1] Beacon Inpatient care manager
[2] Beacon Community care manager
[3] Transition of Care (TOC) care manager

[4] GHP medical home case manager
[5] PGP case manager

Section D (KeyHIE Future)

Section E Barriers

Section F Quality of Working Life

Section G: About you

END