

Online Supplementary Material

Jaén CR, Crabtree BF, Palmer R, et al. Methods for evaluating practice change toward a patient-centered medical home. *Ann Fam Med*. 2010;8(Suppl 1):S9-S20.

http://www.annfammed.org/cgi/content/full/8/Suppl_1/S9/DC1

Supplemental Appendix 9. NDP Evaluation Team Site Visit Guide

The appendix begins on the next page.

NDP EVALUATION TEAM SITE VISIT GUIDE

PRE-VISIT:

- Send email to practice contacts to establish site visit date. Send follow-up email with specific details of visit: confirm interviews, observation points, patient paths, etc.
- Visit website, review all existing data from facilitators, learning sessions, etc. Learn names, faces, get a "feel" for the practice. Review existing IMPACT models and familiarize self with motivators, resources, challenges, etc.

ON-SITE OBSERVATIONS:

(use the TransforMED Observation Template Guide to complement the following):

- Observation of the external fitness landscape (drive or walk around town, scan phone book and newspapers, look for presence/absence of health systems, ask specifically in interviews about landscape, etc).
- Tour of facility – external/internal (location, appearance, age, condition, lay-out, stories told by person giving the tour, etc)
- Observation of the waiting room (# of pts through in an hour, average wait, presence of roaming drug reps, description of patients, listen to interactions at check-in desk)
- Observation sitting behind front desk (scheduling/check-in process, triage, communications with clinical staff, phone etiquette and demeanor)
- Observation of the "nurse's station" – i.e., the hub of clinical activity (communication b/t staff and physicians, phone responsibilities, huddles? etc)
- Observation of patient path (waiting time, time with staff and providers, communication and interaction of patient and staff/provider, etc)
- Observation of any staff or physician meetings if any occur (how do these people communicate?)
- Observation of any special practice events (e.g., group visits)
- Informal interviews with staff as opportunities become available. (Start with questions about job description and move into questions about changes and their role in those changes. Use the "stories of change" and "critical incident stories" template in the Tmed Practice Interview Guide.)
- **While doing all the above, use the Tmed Observation Template as a guide.**

ON SITE INTERVIEWS:

- Formal interviews with key stakeholders: the lead physician, as many other physicians as possible (formal or informal); practice manager; clinical manager or lead nurse; others as directed by the physician or office manager or data (such as MA's or RN's or outside educator); representative from administration if possible if practice is part of a system.
- Informal interviews with all of the above during times of observation or casual conversation; anyone else encountered throughout visit.

Three guides to these interviews:

1. Tmed Key Stakeholder Interview Guide (Motivation, Stories of Change, Outside Motivators, Fitness Landscape, etc)

2. TMed Model of Care – go around the model and highlight each component; ask them to describe what they are doing. Ascertain what things have been implemented over the past year, then ask them to describe that process.

3a. Root Questions for Facilitated Practices:

- Perceptions about facilitation process & the NDP
 - Let's reflect together. Could you tell me about the TMed process?
 - How helpful has TMed been with the process? Describe.
 - What else could TMed have done?
 - What else would you have liked to have had happen?
 - Learning sessions
 - Facilitation process
 - Support
 - What are your thoughts about transformation and the medical home concept?
 - The TMed model?
 - The change/development strategy?
 - What does a transformed practice look like to you?
 - How are decisions made in this practice? Who does the legwork?

3b. Root Questions for Self-Directed Practices:

- Perceptions about change process as SD practice
 - Let's reflect together about that changes of the past year.
 - Describe your accomplishments... why they worked.
 - Describe your challenges/barriers... what would help?
 - What informed your change process?
 - How would a facilitator be helpful? In what specific ways?
 - What are your thoughts about transformation and the medical home concept?
 - The TMed model?
 - The change/development strategy?
 - What does a transformed practice look like to you?
 - How are decisions made in this practice? Who does the legwork?

POST-VISIT:

- Review notes and interviews/clean-up and organize. Any missing data, contact practice key informant and try to fill in the gaps.
- Follow-through on any requests from practices, such as the request to send them information on a certain model component or connect them to another practice. Some practices asked for feedback based on comparative observations of other practices.