

Supplemental materials for:

Wagner KK, Austin J, Toon L, Barber T, Green LA. Differences in team mental models associated with medical home transformation success. *Ann Fam Med.* 2019;17(Suppl\_1:S50-S56.

Supplemental Appendix 1

Interview Guide Example

Chronic Disease Management focus

These questions act as a general interview guide for the two facilitators. They are not to be asked verbatim or in order, but serve to illustrate the information that should be elicited.

Sweep 1: structure and function. “Describe how chronic disease management is set up in your clinic.” Obtain information about

- Whether they have a panel, one or more registries, which diseases covered, what technology, reports generated, how used, forms (e.g., formal complex care plan)
- Who is involved, in what aspects & roles – both officially and unofficially
- Tacit goals: patient relationships vs “hitting the numbers”

Sweep 2: walk through the process, from initial contact (by patient or team) to followup.

- Recall a specific typical patient, if possible.
- How they book, who sees them when, who does what care and coordination
- Information passed among team, activities done offline or out of visit times
- How needs are determined, gaps caught, where things fall through or go astray

Sweep 3: how has it developed? Probe evolution over time.

- How did the practice get involved?
- How was it explained, and understood? By everyone, some, who?
- Whose roles and relationships changed? How?
- How was it planned, and who was involved?
- How was the work allocated? Who made the decisions, and who had voice in them?
- How do you know when it’s working well, and when it’s not? (probe for specific examples, the who/how as well as what)

Sweep 4: walk through a specific recent change in how CDM is done. (Can be anything; adding a new chronic disease to the mix, changing a practice guideline, making a change based on something not working well or because someone has an idea to try)

- Describe the change itself
- Who decided, who had input, whether there was unspoken resistance
- Why done, how rolled out, what preparation, communication
- Team’s reaction to it, changes in roles and relationships
- Planned follow up, how evaluated, “done deal” or subject to reconsideration