Field Research Conversation Guide – Staff-Facing Check-In Experience

# Overview

We are doing site visits as part of exploratory research for check-in and patient tracking / clinical workflow management, in light of the upcoming deprecation of kiosks and VetLink software.

Research Questions

* What are tools in use for checking patients in and managing workflow? How do staff interact with them?
* What are current barriers to checking patients in, managing patients through the clinical workflow?
* What are the constraints of the physical environment?
* What are competing responsibilities of staff?
* What workarounds have people developed?

# General Site Observations

|  |  |  |
| --- | --- | --- |
| Site | Date | Researcher(s) |

* What check-in options are visible on site? Kiosks? Clerks available at entrances/clinics within the site?
* What are waiting areas like?
  + Is signage in place to support check-in wayfinding?
* How is wifi & mobile coverage?

# Check-In [MSAs, Clerks, Schedulers, PSAs, Lab/Pharm/Enrollment]

## Intro

|  |  |
| --- | --- |
| Clinic | Participant Name, Role |

Hi, my name is [ Name ]. I am working with the Office of Technology to see how we might improve the check-in experience for staff and veterans.

* Do you have 30-45 minutes for me to observe how you check in veterans for their appointments and talk through the process so I can gain a better understanding?
* If yes, thank you for agreeing to talk with me today.

I want to have as little impact on your work today as possible. To start, I’ll ask just a few brief questions, and then, if it’s okay with you, I’ll just observe quietly while you do your job for 20 minutes or so. After that, I’ll ask you a few follow up questions. Overall, it should take between 30 and 45 minutes.

* Can you tell me a little about your role at this site, what do your responsibilities include?
* How long have you been in this role at this site?

## Observation

* What methods are veterans using to check-in?
* What tools are in use by the staff member to manage check in?
  + Digital?
  + Analog?
* What is the typical flow?
  + What makes a check-in ‘atypical’ or lengthy / difficult, etc?
* Does the staff member update Veteran information?
  + When do they update Vet information, vs not?
  + What tools do they use to do this?
* What else is the staff member doing aside from checking in Veterans?
* How do Veterans who are hard of hearing or deaf check-in?
  + What about Veterans who are blind or have limited vision?
  + What about Veterans with other disabilities, such as cognitive disabilities or disabilities that impact mobility?
* Any visible workarounds in use?

## Follow Up Questions

* Fill in gaps from observation:
  + Possible Examples
    - I saw that when … happened, you responded by …. How did you know to do that?
    - I noticed …. How often would you say that happens?
    - How does it feel when …?
* What happens if a Veteran doesn't fully complete the check-in process?
  + What are other ways that check-in goes wrong, how do you remedy them?
* Is there anything else you use this tool for besides checking Veterans in?
* Overall, what do you like about how you currently check in a Veteran?
* What do you dislike about how you currently check in a Veteran?
* If you could change anything about check-in to make it easier for you, what would you change?
* What capabilities of the kiosk and VetLink software (or current check-in system) would you say MUST be included within the new system (the items that can’t be removed)?
* What worries do you have about the Kiosk & Vet link software going away and a new check-in process/system being available in its place?
* If you could design check-in anyway that you wanted, what would that check-in process look like?
* Anything you think I should know about checking in patients that we haven’t discussed?

# Clinic Workflow [MSAs, Nurse, Provider]

## Intro

|  |  |
| --- | --- |
| Clinic | Participant Name, Role |

Hi, my name is [ Name ]. I am working with the Office of Technology to see how we might improve the check-in & patient tracking experience for staff and veterans.

* Do you have 30 minutes for me to observe how you check in veterans for their appointments and talk through the process so I can gain a better understanding?
* If yes, thank you for agreeing to talk with me today.

I want to have as little impact on your work today as possible. To start, I’ll ask just a few brief questions, and then, if it’s okay with you, I’ll just observe quietly while you do your job for 20 minutes or so. After that, I’ll ask you a few follow up questions. Overall, it should take around 30 minutes.

* Can you tell me a little about your role at this site, what do your responsibilities include?
* How long have you been in this role at this site?

## Observation

* What are the systems in use by staff to communicate about where in the process the Veteran is?
  + Digital?
  + Analog?
* What is the typical process?
  + Do patients get called by a staff member?
    - What about hard of hearing, deaf, low vision, blind Veterans?
  + How do staff know who to call?
  + What steps happen from a ‘status’ management perspective between the patient being called and leaving the clinic?
  + Do staff use multiple workstations throughout the clinic?
  + What else do staff do as part of their workflow when communicating about patient status? (ie, do they update charts, change multiple statuses at the same time?)

## Follow Up Questions

* Fill in gaps from observation:
  + Possible Examples
    - I saw that when … happened, you responded by …. How did you know to do that?
    - I noticed …. How often would you say that happens?
    - How does it feel when …?
* Are there scenarios that come up that the current system doesn’t work for?
* What happens if there is a miscommunication between staff about patient status?
  + Why does that usually happen?
* Is there anything else you use this tool for besides communicating patient status?
* Overall, what do you like about how you currently track patients?
* What do you dislike about how you currently track patients?
* If you could change anything about the system to make it easier for you, what would you change?
* What capabilities of the kiosk and VetLink software (or current system) would you say MUST be included within the new system (the items that can’t be removed)?
* *What worries do you have about the Kiosk & Vet link software going away and a new check-in process/system being available in its place?*
* If you could design patient tracking anyway that you wanted, what would that check-in process look like?
* Anything you think I should know about patient tracking that we haven’t discussed?

# Supervisor/Manager/Admin Interview: 30 minutes

## Intro

|  |  |
| --- | --- |
| Clinic | Participant Name, Role |

Hi, my name is [ Name ]. I am working with the Office of Technology to see how we might improve the check-in & patient tracking experience for staff and veterans. The team I'm working with is looking at how VA medical centers and CBOCs currently handle checking Veterans in and tracking Veteran through their appointment or services. As you know, the kiosk tool and VetLink software that many sites use are being deprecated in the next year, and we are talking to staff, as well as Veterans, to make sure that what is built in its place meets the needs of everyone involved.

* In this conversation, we want to hear your honest opinions. There are no right or wrong answers. We just want to improve these tools to better meet staff and Veteran's needs. I will not be offended by any opinions you express, and I welcome your feedback.
* If we’re talking about a particular software tool you use, I may ask you to show me on your computer screen so I can see how you use it. Is that something you’re comfortable with
* If for any reason and at any time you want to stop the session, please let me know.

Okay let’s get started.

* Can you tell me about how check-in works at your site?
  + What about check-in is important to you in your role?
    - How do you access the information you need regarding check-in?
    - What are you looking for in that information?
    - Are there changes that you’ve made to your site based on that information?
  + How has Covid impacted the check in process?
  + Overall, what do you like about how you currently check in a Veteran?
  + What do you dislike about how you currently check in a Veteran?
  + If you could change anything about check-in to make it easier for you, what would you change?
  + If you could design check-in anyway that you wanted, what would that check-in process look like?
  + Anything you think I should know about checking in patients that we haven’t discussed?
* Can you tell me about how staff at your site track a Veteran throughout their appointment or services?
  + What about the system to track Veterans is important to you given your role?
    - How do you access the information you need about patient tracking?
    - What are you looking for in that information?
    - Are there changes that you’ve made to your site based on that information?
    - How has Covid impacted patient tracking?
  + Overall, what do you like about how you currently track patients?
  + What do you dislike about how you currently track patients?
  + If you could change anything about the system to make it easier for you, what would you change?
  + If you could design patient tracking anyway that you wanted, what would that check-in process look like?
  + Anything you think I should know about patient tracking that we haven’t discussed?

If using VetLink:

* What capabilities of the kiosk and VetLink software (or current system) would you say MUST be included within the new system (the items that can’t be removed)?
* What worries do you have about the Kiosk & Vet link software going away and a new check-in process/system being available in its place?

# Thank-You and Closing - 2 minutes

Well we really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to work on these systems and make sure it really works for staff and Veterans.

Thank you so much again, and enjoy the rest of your day!