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## Appendix: Patient and Clinician Interview Guides

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This appendix accompanies a set of resources on developing a prototype for a new digital resource, **How's My Health Dashboard**, which would help patients and health care providers work together to achieve health goals that are important to patients. This project was conducted by United Hospital Fund and supported by a grant from the New York State Health Foundation.

*Patient Interviews.* The main interview objectives (#1-4) included getting to know each participant; learning about their views of the relationship between patient and primary care providers; listening to each person's goals, priorities, role and expectations of health care interactions. Interview #5 collected user feedback on the dashboard prototype.

*Clinician Interviews.* The first interview explored views of the relationship between patient and primary care providers; clinicians' goals, priorities, role and expectations of health care interactions. The second interview collected feedback on the dashboard prototype.

Other resources from this project may be found at [the United Hospital Fund website](#).

# Patient Interview #1

## Interview #1 Agenda

- Introductions (5 mins)
- About the project (5 mins)
- How we'll work together and project timeline (5 mins)
- Starting our work together (45 mins)
  - Checking-in: How are you currently coping with your health? (15 mins)
  - What matters most to you? (15 mins)
  - Sharing stories (15 mins)
- Wrap-up (5 mins)
  - Summary and next steps

## About the project How's My Health Dashboard

- Create a better way for you and your provider to communicate before, during and after a visit, and to share information important to help you manage your health.
- You, as patient will help identify the information that you find most important to share, information that you'd want to have access to easily to manage your health.
- The product will be a digital dashboard that helps you and your provider share information that you can easily access via a computer, tablet, or app.

## How we'll work together

- Five to six one-hour interviews
- What will we talk about during each interview?
  - We will ask for your input and ideas on different topics, all related to helping you and your provider best manage your health and what is most important to you.
- Every time we talk with you, we will agree to:
  - Let you know the theme of the conversation
  - Answer your questions before we start.
  - Start and end meetings on time.
  - We do not judge; we listen and respect all experiences and opinions.
  - Respect that you are free to choose not to answer any question you prefer not to answer.

- Try to stay on topic and use “parking lot” for issues to be addressed at a later time.
- Protect your confidentiality. We will be taking notes but no one’s name will be written down; what you say will remain anonymous.
- Nothing that you say will affect your medical care in any way.
- End each meeting with a summary and next steps.
- Invite you to share any comments about the interview, what worked well for you, what didn’t.

## Timeline

Below is a draft timeline for the interviews – it may change but we will be sure to keep you updated.



## Starting our Work Together (45 mins)

- How are you currently coping with your health? (15 mins)
  - What matters most to you? (15 mins)
  - Sharing stories (15 mins)
1. Checking-in: How are you currently coping with your health – specific changes, challenges?
  2. What matters most to you? (see Meet Dave section below; and Worksheet 1)

In this part of the conversation, we’d like to:

- Identify what matters most to you in your life and health
- Describe what you want your health care to do for you

We’ll guide you through this.

## Meet Dave: What matters most to him?

(Source: Patients Priorities Care<sup>1</sup>)

Four important parts of your life:

Connecting • Enjoying Life • Functioning •  
Managing Health



**Meet Dave!** He's a 74 year old widower with diabetes, heart disease, and arthritis.

Dave is only an example so that you get to better understand what we want to explore with you.

What matters most: Dave's Example

## Connecting

*Family, friends, spirituality/religion, community*

**Which relationships or connections are most important to you?**

My daughter, my dog, friends from church

## Enjoying life

*Recreation, hobbies, play, personal growth, learning, being productive*

**What brings you the most enjoyment or pleasure?**

Taking walks with my dog, going to baseball games

## Functioning

*Taking care of yourself, being independent, not having to depend on others*

**When taking care of yourself, what is most important to you now?**

Being able to walk, not being dependent on others

## Managing health

*Quality and length of life, mind and body health, managing pain and fatigue*

**What do you hope your health care can do for you?**

Allow me to live by myself as long as possible

Now your turn.

## Connecting

*Family, friends, spirituality/religion, community*

**Which relationships or connections are most important to you?**

---

## Enjoying life

*Recreation, hobbies, play, personal growth, learning, being productive*

**What brings you the most enjoyment or pleasure?**

---

## Functioning

*Taking care of yourself, being independent, not having to depend on others*

**When taking care of yourself, what is most important to you now?**

---

## Managing health

*Quality and length of life, mind and body health, managing pain and fatigue*

**What do you hope your health care can do for you?**

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### Sharing Stories (15 minutes)

- We'd like you to talk about two experiences you had either with seeking advice from your clinic team about a health question, concern or problem. This could be before COVID or more recently.
- We'd like to better understand:
  - Why you reached out
  - How and what did you and your provider talk about re. your concern
  - What happened and what was your experience

Take a few minutes to reflect on two experiences interacting with the clinic – one positive and one negative. You can look at Worksheet #2 to get a sense of what we will be exploring with you.

### Worksheet #2: Sharing Stories

Think of two stories related to a concern you had about the main health issues you're managing. And how you reached out to the practice to get advice: 1) the first story will be about a recent (within the past 6 months) interaction with the clinic and your experience was a positive one; and 2) the second will be about an interaction with the clinic and your experience was not so good. Below is a set of questions to help you write down your stories.

	Story of a Positive Experience	Story of a Negative Experience
1. What was your main health concern? (e.g., worry about a new symptom, diet, medications, understanding your test results and what do about them, problems following your clinicians' recommendations from previous visit)		
2. How did you reach out to the practice? (e.g., walked-into the clinic, by phone, call center, MyChart, or e-mail?)		
3. What was your experience with getting in touch with your provider?		

	Story of a Positive Experience	Story of a Negative Experience
4. What was your experience with telling about and resolving your concern? (e.g., the practice didn't help me with I was concerned about; I didn't agree with the advice; we settled on a good plan)		
5. How did you feel about your conversation with the provider? (e.g., I felt heard, I was rushed so I could really explain)		
6. How did you feel after the visit? (e.g., I felt reassured and confident in managing my health; I felt rushed and ignored; I learned exactly what I needed to know and do)		
7. Is there anything you would have wanted to talk about with your clinicians that would have helped both of you discuss your concern and come up with a solution you felt good about and doable?		
8. Was there one thing your provider told you that helped you feel more confident?		
9. Was there something your provider told you to do that made it difficult to meet your goals, or comes in the way of what matters in your life?		



Thank you for sharing each story. Let's take story #1. Thinking about that visit:

1. How much effort was made to help you understand your health issue?

0	1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---	---

No effort

Every effort was made

2. How much effort was made to listen to the things that matter most to you about your health issue?

0      1      2      3      4      5      6      7      8      9

No effort

Every effort was made

3. How much effort was made to include what matters most to you in choosing what to do next?

0      1      2      3      4      5      6      7      8      9

No effort

Every effort was made

Now let's take Story #2 thinking about that visit:

1. How much effort was made to help you understand your health issue?

0      1      2      3      4      5      6      7      8      9

No effort

Every effort was made

2. How much effort was made to listen to the things that matter most to you about your health issue?

0      1      2      3      4      5      6      7      8      9

No effort

Every effort was made

3. How much effort was made to include what matters most to you in choosing what to do next?

0      1      2      3      4      5      6      7      8      9

No effort

Every effort was made

## Summary and next steps

We learned a lot today – thank you.

We now have a better understanding of what matters to you as a person with diabetes and other health ailments, and how you creatively balance many aspects of your life and find ways of juggle sometimes difficult choices given your values.

You also shared examples of your interaction with clinicians from your practice.

We will be summarizing the main learnings from our interviews with the other participants. This will inform our second call with you. That interview will be about hearing what are the most common issues that come up for you as you want to live your life with diabetes. And how you work with your clinical team to achieve your goals.

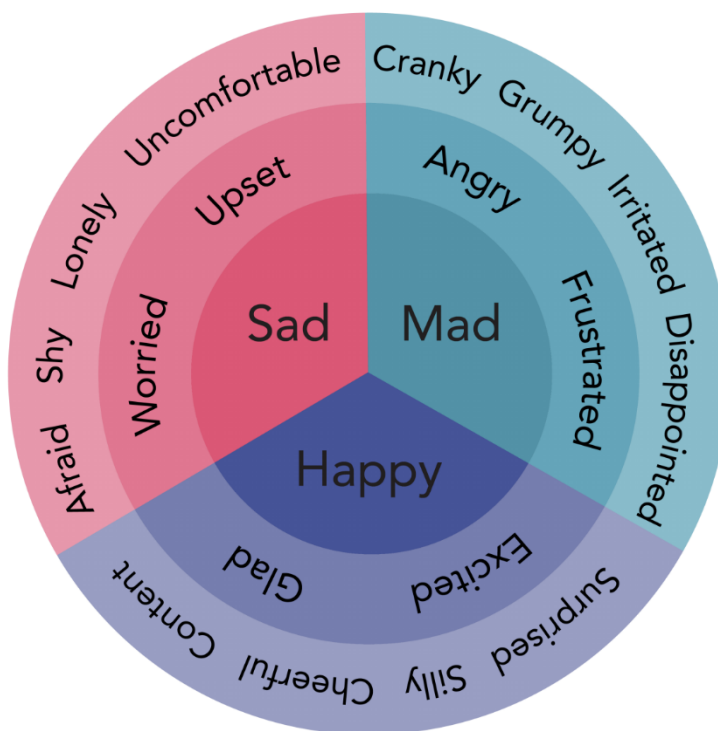
## Patient Interview #2

### Interview #2 Agenda

- Welcome and checking-in (5 min)
- Recap of last call and today's goals (5 min)
- Communicating about What Matters and about Priorities and Goals (45 min)
- Wrap-up (5 min)

### Welcome and Checking-in (5 min)

Refer to the feelings wheel. Please choose a feeling that best describes how you are just now in this moment.



## Recap of Last Call and Today's Goals (5 min)

We heard about what matters to you and to other participants, balancing family, friends, work, other activities that bring meaning to you, while also managing your health. Here are some of the themes we heard:

- A person's life is much bigger than the condition they live with
- Importance of having a good understanding of your conditions
- Importance of being confident about how you can best manage it
  - How you can track various things that let you know how well you're managing
  - Knowing your numbers – BP, glucose, triglycerides, other
  - Activities that will help you stay healthy
- Quality of life is the most important thing
  - Socialize with friends, family
  - Balancing work and home
  - Doing activities, you love – travel, walking, cooking
  - Feeling good about yourself and in your body
- Independence is also key
- You look to your doctors:
  - to help you be independent
  - to know information you shared without needing to repeat it
  - to share key info about you with other doctors, so that they can recommend the best solutions to help with your health
  - to listen and not to rush
  - to be respectful

Based on that information, today we'd like to explore in more depth what are the most common issues that come up for you as you manage your life and your diabetes and how you work with your clinical team to achieve your goals.

## Communicating about What Matters and about Priorities and Goals (45 min)

Below is a list of the various issues that matter most to people like you, goals that you may have and that you want to communicate to your health care team so that you can feel confident about managing your chronic conditions and living well (coping) with them.

- Understanding the disease – what causes it, how it affects the body
- Quality of Life: being confident about living with the condition – and being happy about your social, physical, and emotional functioning.
- Understanding and dealing with symptoms
- Managing disease and preventing complications
- Understanding medication purpose, how to take, what to watch for, and when to contact your doctor with problems.
- Connecting for logistical questions (e.g., medication refill, referrals)

Look at the six issues. Are there others that you want to add?

Of these, which would you say are the most important?

And which is the least important?

Which one of these would you like to discuss most with your care team?

Now let's take the first item that is really important to you and explore it a bit more.

### Example: Let's take quality of life - social, physical, emotional - as your goal

- Can you tell me more about this?
- What does it mean to you? If you were talking to your best friend or someone you're close to, how would you describe to them what your goals are, what you hope to be doing, with whom, where?
- Tell me what makes it difficult for you to achieve these goals?
- What has helped you?
- Who helps you, and how?
- Tell me more about whether or how you bring this up with your clinical team (and if yes, with whom)? What's been your experience in talking about this?

### Wrap-up

Thank you for the information you shared with us today. We have a better understanding of what's most important for you to feel confident about managing your health; and you've shared some

examples of people, resources that help you achieve your goals. We'll be talking with other participants and in our next call, we'll give you a summary of the main lessons we've gathered from you and the other 7 participants. We'll also be exploring how you and your health care team work together to achieve your goals.

## Patient Interview #3

### Interview #3 Agenda

- Welcome and checking-in (5 min)
- Recap of last call and today's goals (5 min)
- A checklist of things my doctor should know (45 min)
- Wrap-up (5 min)

### Welcome and Checking-in (5 min)

### Recap of Last Call and Today's Goals (5 min)


We heard about the issues that you typically talk about with your doctor, and those that you think are important to talk about, but you may not always have the time, or you're not sure whether to bring those up or not. Here are some of the topics you told us about.

You look to your doctors:

- to help you be independent and feel confident about managing your health
- to know key information about you that you've shared without needing to repeat it
- to coordinate and access key info about you with other doctors, so that they can recommend the best treatment options
- to listen and not to rush
- to let you ask questions
- to be respectful

### Quick jogging of your memory: oops, I forgot to ask!

With this project we want to improve your interactions with your doctor. That's what we want to talk about with you today – how could the MyChart portal be improved to help you and your doctor communicate about your priorities.



Can you remember one time you went to an appointment and then when you went back home, you remembered one main thing that you wanted to tell your doctor and ask about but forgot while you were in the office?

Your answer: \_\_\_\_\_

### **A checklist of things my doctor should know (45 min)**

#### **Think of a visit with a new doctor, or your annual visit to review your overall health**

What information would you want to make sure you and your doctor talk about, so that you trust that both of you are on the same page in terms of how you assess your health and what your goals are?

### **About me (information that is always available (updated every 6 months or yearly)**

#### **Let's talk about my health status and how I function**

Below is a set of questions that are meant to give an overall assessment of how you experience your health. We'd like to try it out and get your feedback about it. For example, if when you schedule your appointment your doctor was to send you these questions via MyChart for you to answer ahead of the visit, how would you feel about filling it out and sending your answers?

How helpful would it be for you to share this information with your doctor? How helpful do you think it be for your doctor to have this information?



1. Talking about your health overall:

	Excellent	Very good	Good	Fair	Poor
1a In general, would you say your health is:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	5	4	3	2	1

- Tell us more about whether or how you bring this up with your clinical team (and if yes, with whom)? What’s been your experience in talking about this?
- If you compare 1a to 1b, can you tell us which set of questions you think would represent that you want to say most accurately?

- 1b Compared to one year ago, how would you rate your health in general now?
- Much better now than one year ago
  - Somewhat better now than one year ago
  - About the same
  - Somewhat worse now than one year ago
  - Much worse than one year ago

2. Talking about your quality of life:

2a In general, would you say your quality of life is:

Excellent	Very good	Good	Fair	Poor
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	4	3	2	1

- Tell us more about whether or how you bring this up with your clinical team (and if yes, with whom)? What’s been your experience in talking about this?
- If you compare 2a to 2b, can you tell us which set of questions you think would represent that you want to say most accurately?

2b Compared to one year ago, how would you rate your health in general now?

- ☐ Much better now than one year ago
- ☐ Somewhat better now than one year ago
- ☐ About the same
- ☐ Somewhat worse now than one year ago
- ☐ Much worse than one year ago

3. Talking about your physical health:

	Excellent	Very good	Good	Fair	Poor
	5	4	3	2	1
3a In general, how would you rate your physical health?					

- Tell us more about whether or how you bring this up with your clinical team (and if yes, with whom)? What’s been your experience in talking about this?
- If you compare 3a to 3b, 3c and 3d, can you tell us which set of questions you think would represent that you want to say most accurately? Some are more detailed, or time dependent (recently vs overall)?

	Completely	Mostly	Moderately	A little	Not at all
	5	4	3	2	1
3b To what extent are you able to carry out your everyday physical activities such as walking, climbing stairs, carrying groceries, or moving a chair?					

3c Limitations of Activities:

The following items are about activities you might do during a typical day.

Does your health now limit you in these activities? If so, how much?

Vigorous activities, such as running, lifting heavy objects, participating in strenuous sports.

Moderate activities, such as moving a table, pushing a vacuum cleaner, bowling, or playing golf

Lifting or carrying groceries

Climbing several flights of stairs

Climbing one flight of stairs

Bending, kneeling, or stooping

Walking more than a mile

Walking several blocks

Walking one block

Bathing or dressing yourself

Yes, Limited a Lot	Yes, Limited a Little	No, Not Limited at all
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3d Physical Health Problems:

During the past 4 weeks, have you had any of the following problems with your work or other regular daily activities as a result of your physical health?

Cut down the amount of time you spent on work or other activities

Accomplished less than you would like

Were limited in the kind of work or other activities

Had difficulty performing the work or other activities (for example, it took extra effort)

Yes	No
<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>

#### 4. Talking about your satisfaction with your social activities:

	Excellent	Very good	Good	Fair	Poor
4a In general, how would you rate your satisfaction with your social activities and relationships?	?	?	?	?	?
	5	4	3	2	1

- Tell us more about whether or how you bring this up with your clinical team (and if yes, with whom)? What's been your experience in talking about this?
- If you compare 4a to 4b, can you tell us which set of questions you think would represent what you want to say most accurately?

	Excellent	Very good	Good	Fair	Poor
4b In general, please rate how well you carry out your usual social activities and roles. (This includes activities at home, at work and in your community, and responsibilities as a parent, child, spouse, employee, friend, etc.)	?	?	?	?	?
	5	4	3	2	1

#### 5. Talking about your mental health:

	Excellent	Very good	Good	Fair	Poor
5 In general, how would you rate your mental health, including your mood and your ability to think?	?	?	?	?	?
	5	4	3	2	1

- Tell us more about whether or how you bring this up with your clinical team (and if yes, with whom)? What's been your experience in talking about this?

6. Talking about pain:

6a How would you rate your pain on average?

?

0

No pain

?

1

?

2

?

3

?

4

?

5

?

6

?

7

?

8

?

9

?

10

Worst pain imaginable

- Tell us more about whether or how you bring this up with your clinical team (and if yes, with whom)? What’s been your experience in talking about this?
- If you compare 6a to 6b and 6c, can you tell us which set of questions you think would represent what you want to say most accurately?

6b How much bodily pain have you had during the past 4 weeks?

None

Very Mild

Mild

Moderate

Severe

Very Severe

0

0

0

0

0

0

6c During the past 4 weeks how, much did pain interfere with your normal work (including both work outside the home and housework)

Not at all

A little bit

Moderately

Quite a bit

Extremely

0

0

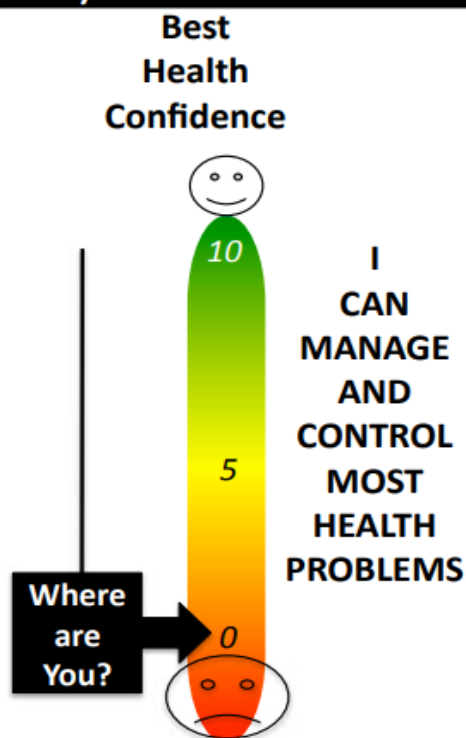
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0

0

Let's talk about how you feel about managing and controlling most health problems you encounter

**What number best describes you... "0" (red) to a "10" (green)... or somewhere in between?**



**A "Best Health Confidence 10"**

means you are very confident you can control and manage most of your health problems.

Zero (0) means that you are not confident at all. If you are somewhere in the middle, mark a number that comes closest to describing your confidence

Source: *PLOS ONE*.<sup>2</sup>

How helpful would it be for you to share this information with your doctor? How helpful do you think it be for your doctor to have this information?

## Let's talk about how you prefer to make decisions.

Is this something that you talk about with your doctor? If so, how do you let the doctor know of your preference?

Below is a set of 5 options about various people's preferences when it comes to making a decision - changing medication, starting a new one, surgery vs watchful waiting. How would you describe your preference?

**When it comes to making decisions about how to manage problems with my health, what statement best describes you?**

1 = I prefer to make the decision on my own

2 = I prefer to seek my doctor's opinion and then to make the final decision

3 = I prefer that my doctor and I discuss the decision to be made, and we come to consensus on the final decision

4 = I prefer for my doctor to seek my opinion and then she makes the final decision

5 = I prefer to let my doctor make the decision on her own

How helpful would it be for you to share this information with your doctor? How helpful do you think it be for your doctor to have this information? Does how you make decisions vary over time or depending on the type of decision?

## Wrap-up and next interview





## Patient Interview #4

### Interview #4 Agenda

- Welcome and checking-in (5 min)
- Recap of last call and today's goals (5 min)
- What are the ingredients of a visit with your doctor? (45 min)
- Wrap-up (5 min)

### Welcome and Checking-in (5 min)

### Recap of Last Call and Today's Goals (5 min)

With this project we want to identify the information that you and your doctor need to share so that you are both on the same page when it comes to your health. You told us that visits are usually short, sometimes difficult to schedule. And it is fair to say that time is what's most precious to each one of us.

So - that's what we want to explore with you today – how the MyChart portal could be improved to help you and your doctor be more easily on the same page about your health and to help you make the most out of your interactions.

### Avoiding the “Oops, I forgot!” moments



Can you think of a time you wished you could have looked up on MyChart to get information about something? What would that be? (e.g., did Dr. A recommend I take the medication before my meal or after? What did we decide should be a target A1c for me?

Your answer: \_\_\_\_\_

### What are the ingredients of a visit with your doctor (45 min)

As you know, health care is changing fast, especially due to COVID-19. So the typical in-person visit will no longer be the only way you can get care. You've likely already experienced

telephone visits or video visits. Many of you have devices that allow you and your doctor to access just-in-time data in digital fashion. For example, you can find out your glucose or blood pressure levels measured by your glucometer or blood pressure monitoring device, and you can share that data easily with your doctors. And then there are times when you need to see your doctor in person, for certain tests, physical examination, or treatments.



Can you think of a time you went grocery shopping? What were all the things you did to plan before you went, and after, when you got home?

Your answer: \_\_\_\_\_

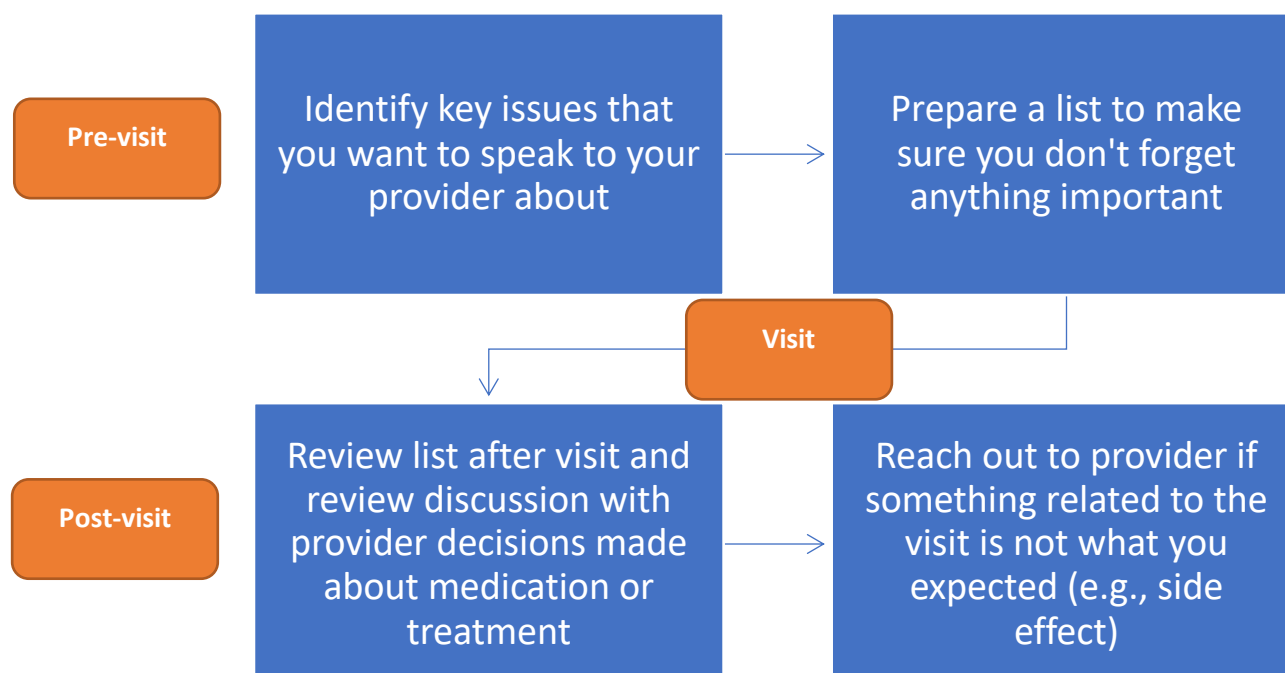
The point is that health care visits will be different each time, and it is helpful to think of them as an activity or an event that has many different steps.

So, what does grocery shopping have to do with health care?

### Steps you take when you go grocery shopping



### Steps involved in a health care visit



**We've talked about how you prepare for a visit, so today let's turn to what you'll need after the visit.**

### **After a visit**

We'd like to hear your experience about what happens after a visit. Your doctor may have made referrals, talked about your follow-up appointments, asked you to get tests done. You may have made decisions about a new treatment plan, obtained recommendations about self-care. Your doctor may have given instructions about what you can expect about the problem you talked about and asked that you contact her should you not be getting better.

How do you manage all these activities when you're back home? What helps you, what would you need to feel confident about managing your health?

### **Using MyChart: post-visit summary and messaging**

- We've talked quite a bit about how you use MyChart. Today we'd like to hear your opinion about the post visit summary. How useful is it, how do you use it, and why? What is missing and what would you like to add to it?
- We've talked about your use of messaging to reach out to your practice. Has your doctor ever reached out to you first? Was that communication expected and what was the reason for your doctor to reach out?

### **Wrap-up and next interview**

Thank you for your participation and for sharing your experiences and ideas about how to improve how you and your doctor can work together to achieve the health goals you set.

In the next month, we will be working with colleagues to translate the suggestions that you made and developing a visual representation of what the dashboard might look like.

Once this is done, we will reach out to you again to show you what the dashboard would look like and get your feedback. It will be a test dashboard, and our goal is that once we get your feedback, it could be programmed into MyChart so that eventually you can access all these new resources.

So, we expect to be back in touch in Mid-October, to schedule the last interviews.

Your insights are invaluable, and we are truly grateful for your willingness to spend time with us during this particularly difficult time. So, a sincere thank you.



## Patient Interview #5

### Interview #5 Agenda

- Welcome and checking-in: Recap of How's My Health Dashboard goals (5 mins)
- Getting your feedback on How's My Health Dashboard (50 mins)
- Wrap-up (5 mins)

#### Welcome and Checking-in: Recap of How's My Health Dashboard goals (5 mins)

As you may recall, the goal of the Dashboard is to help improve communication between you and your provider and to share information that can help you manage your health more easily. We are not trying to replace the MyChart portal; the Dashboard would be an addition to what is currently available on MyChart.

From what you told us over several interviews, we identified elements of a shared dashboard that would make visits more effective, allow you to talk about what you feel is most important to discuss at any of your visits, and ensure that you and your provider are on the same page.

Based on what you and other participants said was important to share with your provider, we developed a set of questions that you would answer before you see your provider – this could be for your annual wellness visit or for any other visit during the year – this would be your own assessment of certain aspects of your health.

Just as you may look at a test result (blood glucose) to check on how you're doing, the answers you give to the question are also results that are important for the doctor to look at. The only difference is that one type of result comes from testing your blood, and the other type comes from your own assessment. Both are important for you and your provider.

We created a visual display of what it would look like for you to provide the information to your provider using the digital dashboard. And today, we would appreciate getting your feedback.

#### Getting your Feedback on How's My Health Dashboard (45 mins)

We will walk you through the dashboard which is shown in the next few pages. As we go over it, please think about the following questions:

1. What is your opinion of the instructions that guide you to input your information?
2. How about the various sets of questionnaires that are included, for example, about how you make decisions and your quality of life (e.g. relevant, easy to understand)?

3. When you look at the one-page information display that will summarize your answers (My Health Circle), what is your reaction? How do you imagine your provider using this to talk with you about your health priorities? How would it affect your communication with your provider?
4. What might be barriers to you using How's My Health Dashboard to input your health priorities before visits? What would make you want to use it before visits?
5. Do you have any suggestions to improve the dashboard?

Let's walk through how you would begin to use the dashboard. You would access the dashboard before every visit: your annual wellness visit and each visit during that year.

We'll start by looking at one visit that has been scheduled with you and your doctor. It might be a follow-up visit for example.

Before any visit with a provider, you will be sent an e-mail or text, for you to prepare for your upcoming visit. You will get a link to How's My Health Dashboard, and you will be guided through a series of questions which will then be summarized in one page for you and your provider to review during the visit.

## MY PRE-VISIT CHECK-IN

You have a visit coming up on 12/5/2020. We want to make sure that we address your main concerns. Below is a list of 10 health concerns. Please select up to three **health topics** that you want to discuss during your upcoming appointment.

### My Top 3 Health Concerns

- ☒ My Health Overall
- ☐ My Health Over Time
- ☐ My Quality of Life Overall
- ☐ My Physical Capacity
- ☐ My Social Function
- ☒ My Mental Wellbeing
- ☐ Issues with Pain
- ☐ Number of Medications
- ☒ Medication Side Effects

### My Health Confidence

	Very confident	Somewhat confident	Not very confident
How confident are you that you can control and manage most of your health problems?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### My Satisfaction with Achieving Previously Discussed Priorities

Your chosen priorities were: My Health Overall, My Mental Wellbeing, and Medication Side Effects

To review more on your priorities click [HERE](#).

	Not at all	A little	Moderately	Quite a bit	Extremely
How satisfied are you with achieving your previously discussed priorities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## My Top Three Health Concerns

Next, you will answer a set of questions, to provide additional information about what you want to bring up to your provider during the upcoming visit.

### My health overall

In general, would you say your health is:

Excellent	Very good	Good	Fair	Poor
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Compared to one year ago, how would you rate your health in general now?

- ☐ Much better now than one year ago
- ☐ Somewhat better now than one year ago
- ☐ About the same
- ☐ Somewhat worse now than one year ago
- ☐ Much worse now than one year ago

### My mental wellbeing

In general, how would you rate your mental health, including your mood and your ability to think?

Excellent	Very good	Good	Fair	Poor
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Number of medications

How many prescription medicines are you currently taking more than three days a week?

None	1-2	3-5	More than 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Medication side-effects

Do you think any of your pill are making you sick?

Yes	No	Maybe	I am not sure	I am not taking any pills
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## My Health Score

Please answer the following questions to create your health score in preparation for your upcoming visit.

During the past 4 weeks, how much have you been bothered by emotional problems such as feeling anxious, irritable, depressed, or sad?	Not at all <input type="checkbox"/>	A little <input type="checkbox"/>	Moderately <input type="checkbox"/>	Quite a bit <input type="checkbox"/>	Extremely <input type="checkbox"/>
During the past 4 weeks how, much did pain interfere with your life, and your normal work (including both work outside the home and housework)	Not at all <input type="checkbox"/>	A little <input type="checkbox"/>	Moderately <input type="checkbox"/>	Quite a bit <input type="checkbox"/>	Extremely <input type="checkbox"/>
How many prescription medicines are you currently taking more than three days a week?	None <input type="checkbox"/>	1-2 <input type="checkbox"/>	3-5 <input type="checkbox"/>	More than 5 <input type="checkbox"/>	
Do you think any of your pill are making you sick?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Maybe <input type="checkbox"/>	I am not sure <input type="checkbox"/>	I am not taking any pills <input type="checkbox"/>

Next you will provide additional information about each of the three concerns you selected.

MY HEALTH PRIORITIES

You’ve selected three topics of most concern to you now. For your visit on 12/5/2020, in the space below each topic, please say more about the concern that you want to bring up with your doctor.

My Health Overall

My pharmacist told me that a prescription for Vit D had been called in for me. I don’t know what it’s for, why I have low levels of Vit D, whether this is dangerous? And I already take a daily Vitamin that has Vit D, so should I take another pill?

My Mental Wellbeing

I’ve been really scared of going out of my home since the pandemic. I have strange dreams.

Medication Side Effects

I had a severe rash when I took drug A, and the NP wanted me to take it again. I don’t want to. What should we do?

Your Updated Summary and Dashboard

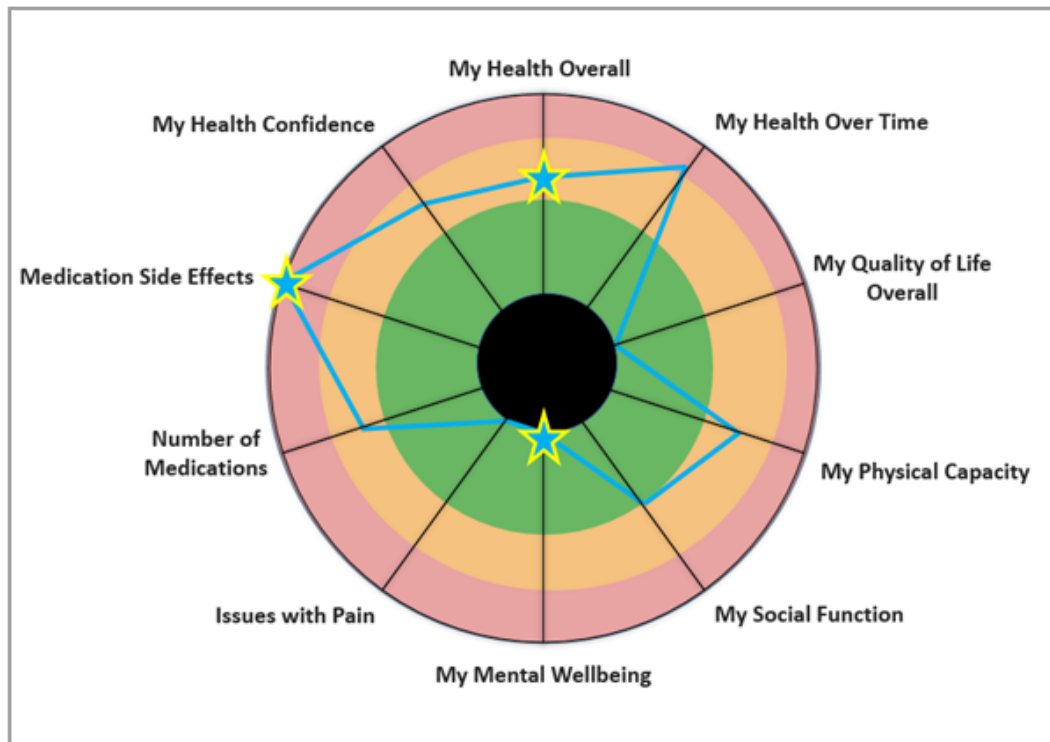
The figure below shows you and your doctor a summary of your answers about how you evaluate your health priorities and what is currently most important to you. You will review this with your doctor at the start of your visit.

The circle has three colors – red, orange, and green. The stars always represent the three priorities you selected for the visit (in this case: My Health Overall; Medication Side Effects; and My Mental Wellbeing).

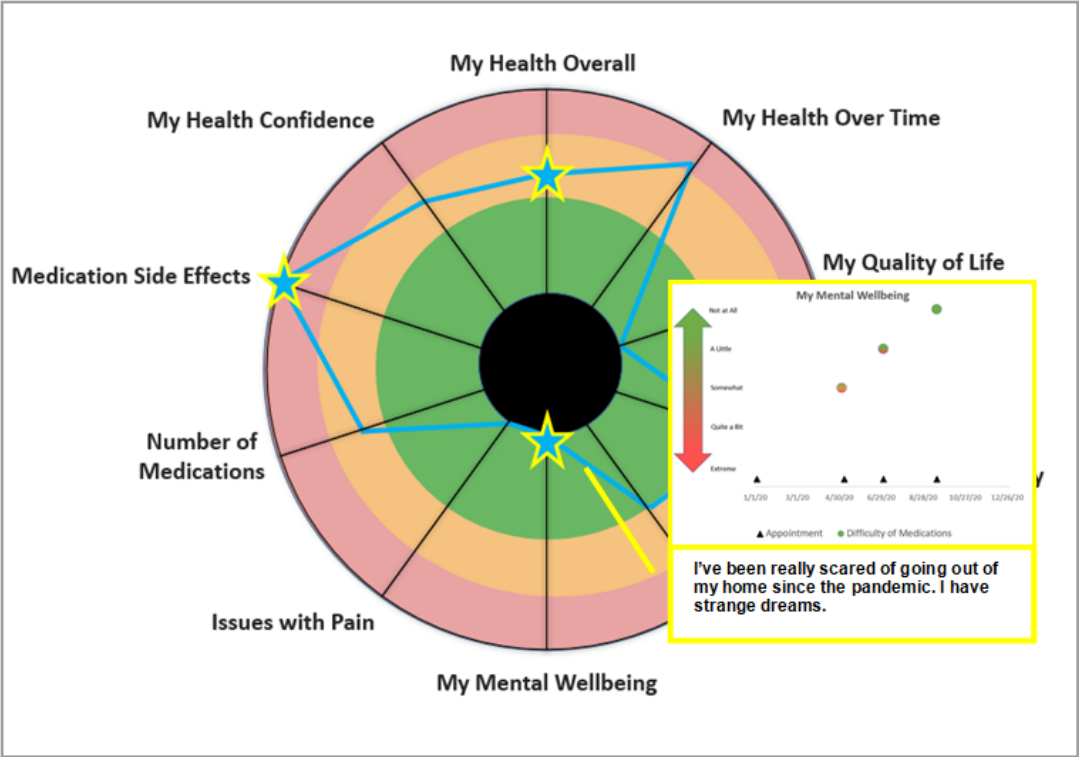
The thin blue line shows the most recent score you gave to each of the 10 health concerns.

You can see more information about the stars by placing your mouse over them. That will show you your previous results based on how you answered the questionnaires over time. You and your provider can discuss any changes and how to address your concerns.

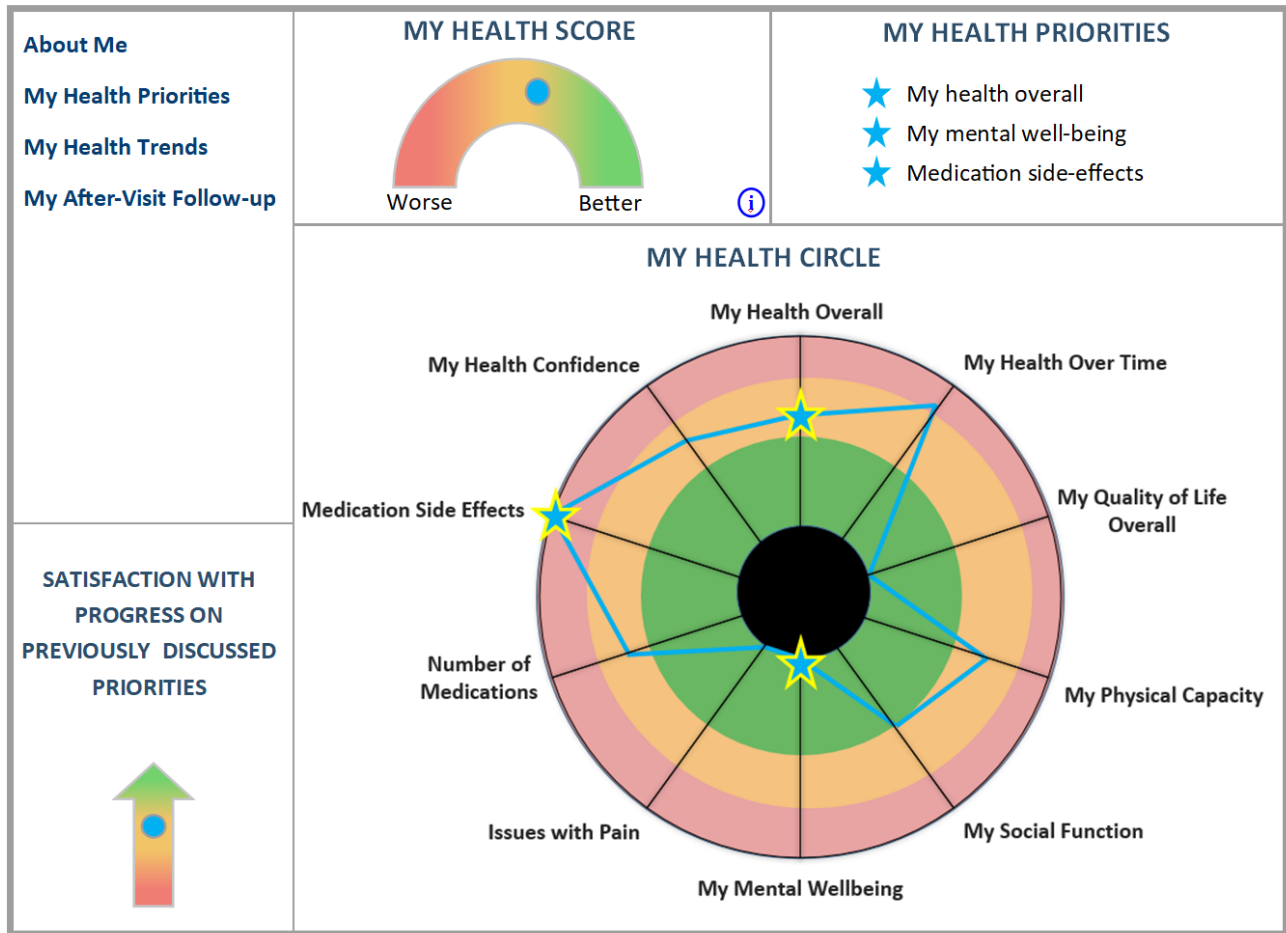
## MY PRE-VISIT HEALTH CIRCLE (Preparing for your next visit 12/5/2020)



MY PRE-VISIT HEALTH CIRCLE (Preparing for your next visit 12/5/2020)



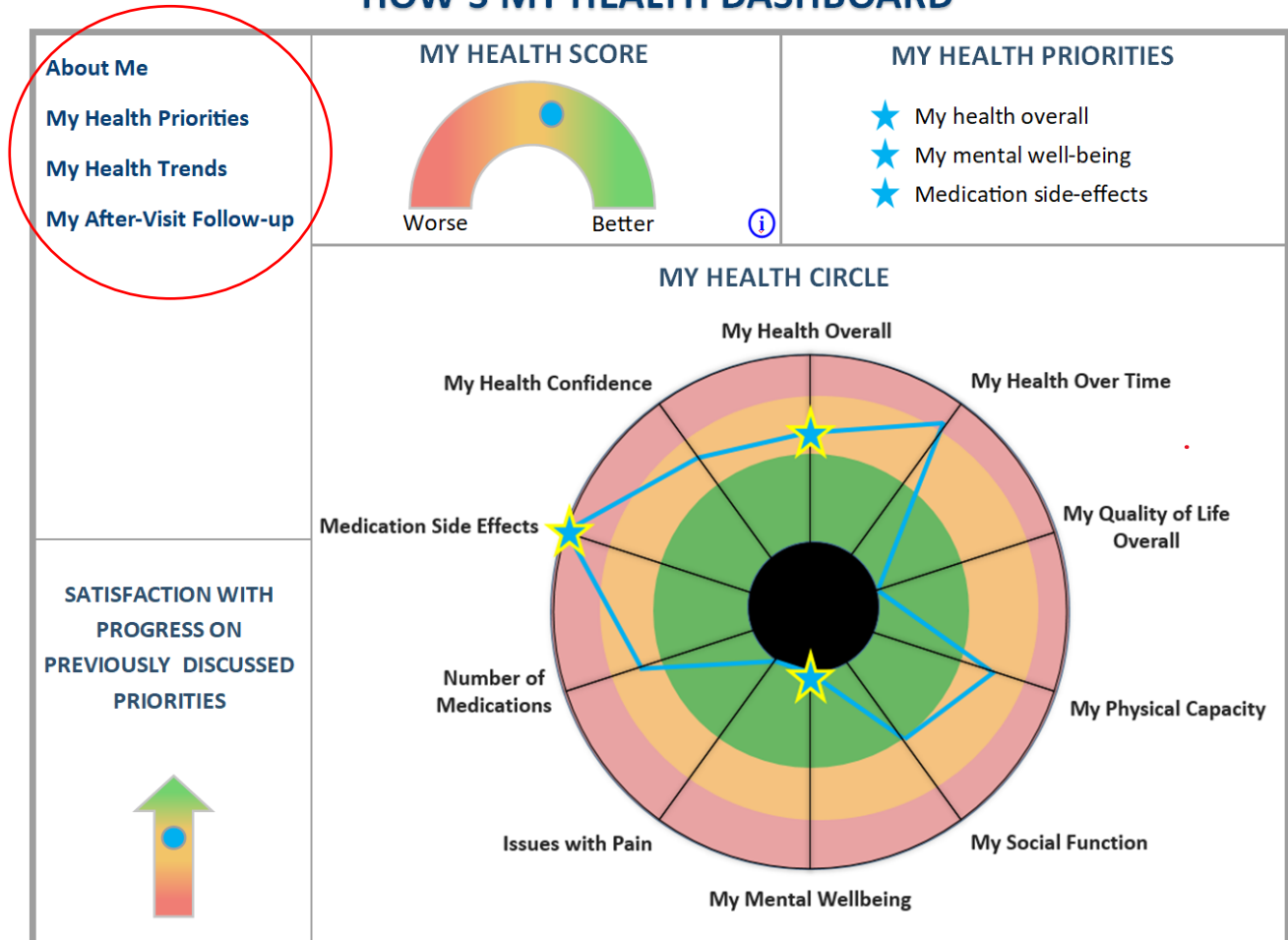
## HOW'S MY HEALTH DASHBOARD



**How to read this image:** Hover over star to see trends and details about selected health priorities. Hover over the blue dots to see previous health scores and satisfaction from previously discussed priorities.

Now let's turn to the other parts of the dashboard

## HOW'S MY HEALTH DASHBOARD



**How to read this image:** Hover over star to see trends and details about selected health priorities. Hover over the blue dots to see previous health scores and satisfaction from previously discussed priorities.

## About Me

You will be asked to complete this section during initial How's My Health Dashboard setup and you can make updates before any visits or at any other time. Any updates will be shared with your care team.

ABOUT ME
<b>I prefer to be called:</b> Ms. Smith
<b>My preferred communication method is (check up to 2):</b> <input type="checkbox"/> Phone <input type="checkbox"/> Patient Portal <input type="checkbox"/> Video chat <input checked="" type="checkbox"/> Text <input checked="" type="checkbox"/> E-mail
<b>Things I enjoy:</b> Spending time with my family and friends, walking in the park, knitting
<b>Who do you feel safe talking to about health issues?</b> My husband and my son
<b>How I make decisions (check one option below):</b> <input type="checkbox"/> I prefer to make decisions on my own <input checked="" type="checkbox"/> I prefer to seek my doctor's opinion and then to make the final decision myself <input type="checkbox"/> I prefer for my doctor to seek my opinion and then for my doctor to make the final decision <input type="checkbox"/> I prefer to let my doctor make the decision



## MY HEALTH PRIORITIES

You've selected three topics of most concern to you now. In the space below each topic, please say more about the concern that you want to bring up with your doctor.

### My Health Overall

My pharmacist told me that a prescription for Vit D had been called in for me. I don't know what it's for, why I have low levels of Vit D, whether this is dangerous? And I already take a daily Vitamin that has Vit D, so should I take another pill?

### My Mental Wellbeing

I've been really scared of going out of my home since the pandemic. I have strange dreams.

### Medication Side Effects

I had a severe rash when I took drug A, and the NP wanted me to take it again. I don't want to. What should we do?

My Health Priorities in the past year:

[Visit 12-5-2020](#)

[Visit 8-3-2020](#)

[Visit 5-4-2020](#)

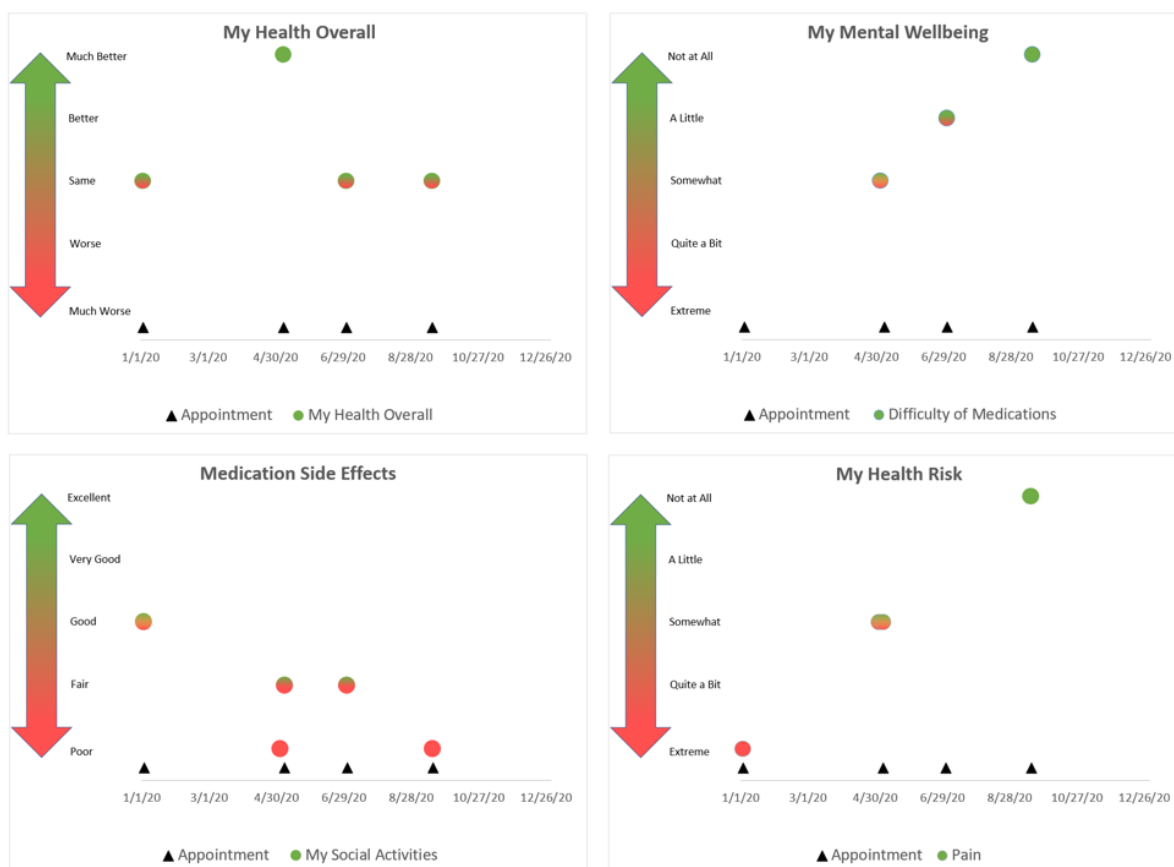
## My Health Trends

My Health Trends allows you to see how your experience of your health is changing over time.

For the visit coming up on 12-5-2020, you have selected three topics of most concern to you now:

1) My health overall, 2) My mental wellbeing, and 3) Medications side effects.

In addition, your Health Score and Progress with your goals are included at each visit. Please see your Health Trends graphs below.



## My After-Visit Follow-up

Once your visit is complete, you'll see a link that connects to your after-visit summary on MyChart.

MY AFTER-VISIT FOLLOW-UP
Refer to your After Visit Summary in Epic MyChart <a href="#">here</a> for your most recent visit on 10/20/2020

## Annual Wellness Visit

We collect information from all health topics during your annual wellness visit.

Let's walk you through how this would work.

First, you will answer questions related to each part of the dashboard.

### My Questionnaires

<b>My health overall</b>					
	Excellent	Very good	Good	Fair	Poor
In general, would you say your health is:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compared to one year ago, how would you rate your health in general now?	<input type="checkbox"/> Much better now than one year ago <input type="checkbox"/> Somewhat better now than one year ago <input type="checkbox"/> About the same <input type="checkbox"/> Somewhat worse now than one year ago <input type="checkbox"/> Much worse now than one year ago				
<b>My quality of life:</b>					
	Excellent	Very good	Good	Fair	Poor
In general, would you say your quality of life is:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>My health and physical capacity</b>					
	Completely	Mostly	Moderately	A little	Not at all
To what extent are you able to carry out your everyday physical activities such as walking, climbing stairs, carrying groceries or moving a chair?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>My mental wellbeing</b>					
	Excellent	Very good	Good	Fair	Poor
In general, how would you rate your mental health, including your mood and your ability to think?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### My pain

During the past 4 weeks how, much did pain interfere with your life, and your normal work (including both work outside the home and housework)

Not at all	A little	Moderately	Quite a bit	Extremely
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Number of medications

How many prescription medicines are you currently taking more than three days a week?

None	1-2	3-5	More than 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Medication side-effects

Do you think any of your pill are making you sick?

Yes	No	Maybe	I am not sure	I am not taking any pills
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### My health confidence

How confident are you that you can control and manage most of your health problems?

Very confident	Somewhat confident	Not very confident
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### My Health Score

Please answer the following questions to create your health score in preparation for your upcoming visit.

During the past 4 weeks, how much have you been bothered by emotional problems such as feeling anxious, irritable, depressed, or sad?

Not at all	A little	Moderately	Quite a bit	Extremely
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

During the past 4 weeks how, much did pain interfere with your life, and your normal work (including both work outside the home and housework)

Not at all	A little	Moderately	Quite a bit	Extremely
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How many prescription medicines are you currently taking more than three days a week?

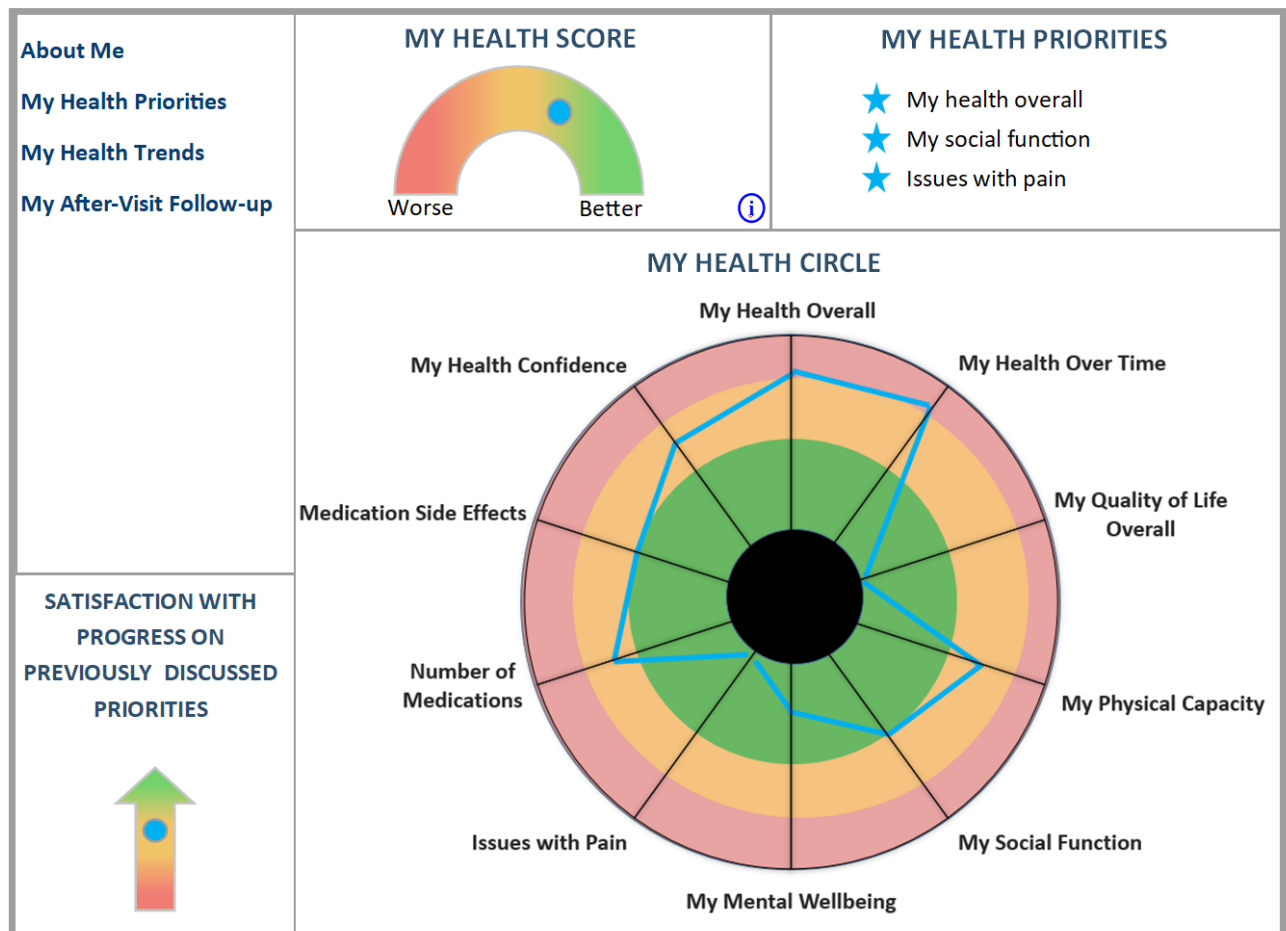
None	1-2	3-5	More than 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you think any of your pill are making you sick?

Yes	No	Maybe	I am not sure	I am not taking any pills
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Once you've entered the information, the summary dashboard will be available for you and your provider to look at together.

## HOW'S MY HEALTH DASHBOARD



### Wrap-up and next steps

Thank you for your participation and for sharing your perspectives on the dashboard design. We really appreciate your input and are truly grateful for your willingness to spend time with us during this particularly difficult time.

## Appendix: Provider Interview Guide

Context: New York State Health Foundation grant to work with your practice and develop a digital solution to facilitate communication between your patients and the health care team.

We're using a model of co-creation of health: there is self-management, clinical management, and **co-management**. And we're focused on chronic conditions with diabetes as use case. This work is about co-management, and on what methods might support the patient/health care team partnership – e.g., a digital information sharing platform: How's My Health Dashboard. In exploring such a tool, we are committed to a process where we co-develop the product with patients. First, we need to better **understand the realities of the interactions** that take place between patients and various members of the practice staff. From that, we will be better positioned to then explore partners' needs, key challenges, their root cause, and how to best support interactions to co-produce health. Although there will be variation in preferences for face-to-face interactions vs non-face-to-face, the objective is to identify whether and how a digital form of interaction could be integrated in the broader care management workflow to enhance co-management and health outcomes.

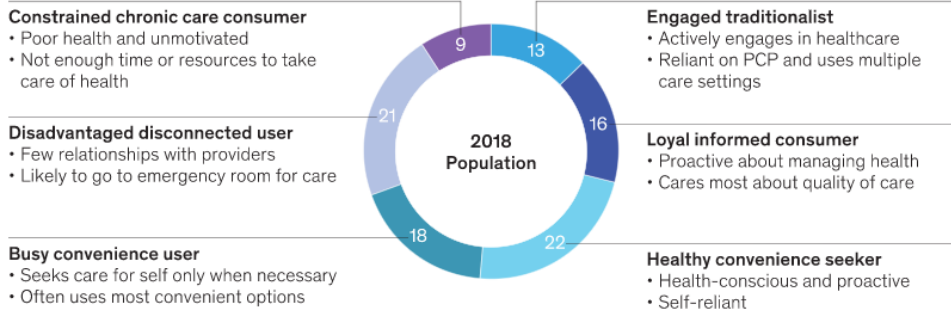
Goal of conversation: to learn staff's perspectives about the co-management process, the needs and challenges they encounter in working and caring for patients with diabetes. Understand workflow of clinic as it relates to patient care and the various touchpoints between the patient and the clinic staff.

### 1. The partners.

- Tell us about you, how you best describe your role in the practice and within the care team managing patients with diabetes.
- Tell us about the patients you partner with – e.g., how many, age, gender, length of diabetes, severity, co-existing conditions. What about their “consumer profile” in terms of needs, behaviors, level of engagement? Many ways to segment populations, do you use one to help you tailor management accordingly?
- Let's look at the McKinsey model. Does it resonate? In which of the 6 consumer segments do most of your patients belong?
- Can you identify “personas” taking these consumer characteristics and including the socio-demographic and clinical profile of the diabetics you care for? For e.g. if you have 1/3 of stable diabetics; 1/3 unstable; and 1/3 very complex with other complications, do these patients fit into one consumer segment or not?
- In summary, can you identify the 3-5 personas that best describe the population of diabetics you serve? And as we begin to think about digital resource to support partnerships, what would you say is the “average” persona? Should the resource address the needs of the average, or the outliers? Why or why not?

## The CHI Survey identified 6 consumer segments with differing needs

% of respondents in each segment



CHI, Consumer Health Insights; PCP, primary care physician.  
Figures may not sum to 100%, because of rounding.  
Source: 2018 McKinsey Consumer Health Insights Survey

McKinsey  
& Company

Source: McKinsey & Company.<sup>3</sup>

### Other partners (the ecosystem).

- In addition to your one-on-one relationship with a patient, other people are likely involved in the partnership – family, caregivers, other health care professionals.
- Describe the most common partners that are involved with co-managing diabetes and health: family/caregivers; community-based services; health care professionals.

## 2. The partnership.

- Let's begin with most common patient with diabetes you see - which segment (based on the above model)?
- Can you describe the various types of interactions you have with those patients? E.g.
  - Who reaches out (who initiates the interaction) – you or the patient?
  - How? Face to face, call, text, e-mail?
  - Scheduled or not; routine or not?
  - Why (symptoms, problem with meds, check-in, concerns/questions)
  - What happens during the interaction?
  - What are outcomes of interactions – nothing else needed, follow-ups?
- What are the main challenges in trying to ensure that an interaction achieves the goal set by the partners?
- Multiple partners interactions: same questions as above.



### 3. Supporting the partnership.

Let's define partnership the following way:

**Partnership** is a collaborative relationship between two or more parties based on trust, equality, and mutual understanding for the achievement of a specified goal – co-creation of health and wellbeing. **Partnerships** involve risks as well as benefits, making shared decisions and accountability critical.

- When you think of your patients, does this concept resonate with you and with them? If not, why not and what is a more appropriate description of your relationship?
- What are the main barriers to establishing co-management partnerships?
- What have you found that helps you establish and sustain partnerships with patients?

Goal setting is key to partnerships.

- How do you, other health care team members and patients approach goals – shared decision making, tracking, etc.? Or not?
- What are challenges?
- What is helpful?

Mutual understanding

- Tell us what this means for you and your patients.
- What are the challenges?
- What is helpful?

### Support for This Work

Support for this work was provided by the New York State Health Foundation (NYSHHealth). The mission of NYSHHealth is to expand health insurance coverage, increase access to high-quality health care services, and improve public and community health. The views presented here are those of the authors and not necessarily those of the New York State Health Foundation or its directors, officers, and staff.

## Endnotes

<sup>1</sup> Tinetti ME, Naik AD, and Dindo L. *Conversation Guide for Patients and Caregivers for Identifying Their Health Priorities*. Patients Priorities Care. [https:// patientprioritiescare.org/wp-content/uploads/2018/11/Conversation-Guide-for-Patients-and-Caregivers-for-Identifying-their-Health-Priorities.pdf](https://patientprioritiescare.org/wp-content/uploads/2018/11/Conversation-Guide-for-Patients-and-Caregivers-for-Identifying-their-Health-Priorities.pdf)

<sup>2</sup> Wasson JH, Ho L, Soloway L, and Moore LG. February 22, 2018. Validation of the What Matters Index: A Brief, Patient-Reported Index That Guides Care for Chronic Conditions and Can Substitute for Computer-Generated Risk Models. *PLOS ONE* 13, no. 2: e0192475. <https://doi.org/10.1371/journal.pone.0192475>.

<sup>3</sup> McKinsey & Company. April 9, 2019. *Healthcare Consumerism Today: Accelerating the Consumer Experience*. <https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/healthcare-consumerism-today-accelerating-the-consumer-experience#>