



FIELD NOTEBOOK

Project:

Date:

Researcher:

Document

Observation involves a deeply curious mind. Document everything that catches your attention.

Try not to judge the data before you document it. If you notice something, it is important. Understanding why it is important might take time and more information.

It is hard to pay attention to someone and write or sketch at the same time. You are not alone in feeling this is awkward. It will get easier as you do it more. There are no prizes for neatness. Messy is fine. Messy might even be great.

Include sights, sounds, and smells, draw pictures, use arrows, note connections and processes, anything that will help you remember. The goal of data gathering is to be able to sit down later and reconnect in a thoughtful way with the experience you observed.

Observation and Interview Tips

- 1 Introduce yourself to providers and patients
- 2 Do not interrupt the appointment
- 3 Look and listen carefully, noting details & events
- 4 Consider all your senses, and how they interact
- 5 Notice processes; how the experience unfolds
- 6 Be curious, ask about what you see
- 7 Speak conversationally versus asking questions
- 8 Be open-minded and unbiased
- 9 Empathize and be aware of the patients current state
- 10 Make notes about problems, opportunities, ideas

Waiting Room Observations

1 Where are you?

2 Observe patients in the waiting room. Are they alone or is someone with them? Overall, how do they seem?

3 What materials do we give people in the waiting room?

4 What are they doing while waiting? Paperwork, phone, talking, etc?

5 What was their wait time from check-in until called?

6 In your opinion how could we educate patients better in this space before (or after) their appointment?

Waiting Room Observations

6 How would you describe the waiting room?

Create a visual of what you see and whats important



Rooming Observations

1 How is the patient roomed? What is the process / who rooms the patient?

2 What is the repertoire between the patient and the rooming provider?
[Greetings / intro., body language, eye contact, general conversation]?

3 Was there any education of the patient's condition or medications during the intake process?

4 Did the roomer provide explanations for what they were doing?

5 Did they set expectations or give explanations for the upcoming appointment and any wait times?

Provider Observations

Appointment Logistics

1 What type of appointment is this? How does this match the time allotted? (*Ask desk or provider for appointment type / length*)

2 Who is part of the appointment? Are there Residents or Fellows, APP's or RN's, before the Consultant?

Relationships

1 How would you describe the providers? What is their personality with the patient and their family members? How are they building trust and relationships?

a Observe AIDET [*Acknowledge, Introduce, Duration, Explain, Thank You*] behaviors that derive from patient experience.

2 Does the provider set an agenda for the appointment?

a Is the patient included in the agenda setting [*are they asked what is the most important item(s) they wish to discuss*]?

Provider Observations

Communication

1 Does the patient seem to have comprehension of the information they are provided? Are they (or others) writing it down? Did they ask questions?

2 Do patients know what to do after the appointment if they have additional questions?

3 What tools or strategies does the care team use to provide patients about their condition, follow-up, and medication? Do they write information down? Highlight? Print? Other?

4 Do we tell patients how and when to take medications? When they should take effect? Side effects?

Provider Observations

**5 Do we tell patients how to manage their health conditions?
Next steps?**

6 For medications, was there a conversation about external factors such as cost, insurance, social context, other?

7 Does the provider use language that the patient can understand? Avoiding jargon?

8 Do you feel the patient understands what they are being told?

Provider Interviews

1 Describe your typical patients? How do they vary?

2 How would you describe your style with patients? Why is it effective?

3 What challenges do you have with communicating with patients? Is there a lack of supporting tools or materials to provide information to patients regarding their condition, follow-up, or medications?

Provider Interviews

4 Do you perceive a disconnect between the information you provide about a patient's condition and the understanding that a patient walks away with?

a If so, do you have a sense for where that disconnect comes from?

5 Do you perceive a disconnect between the information you provide about patient medications and the understanding that the patient walks away with?

a If so, do you have a sense for where that disconnect comes from?

6 After the appointment, do you feel patients know what to do?

Patient Interviews

1 Tell us about yourself? Why are you here? What are your goals today?

2 Is this your first time being a patient at Mayo Clinic?

a If no, is Mayo Clinic where you routinely come for your own healthcare?

3 Tell us about your day at Mayo Clinic? Probe: number of appointments, where do they go, the overall flow of their journey. What do they do between appointments? In the waiting room?

4 How do you feel about your appointments? Do you understand your condition and how you should manage it after leaving Mayo Clinic?

Patient Interviews

5 Do you feel the provider/s listened to you and took into account your preferences when making recommendations for medication and follow-up care?

a How did the provider do this? Did you feel heard?

6 Do you have any questions that were not addressed? If you do later, what will you do?

7 How could this appointment have been improved to help you understand follow-up care and medication?

Additional Notes

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