

Appendix 5

Interview protocol

Patient and family advisor candidate interview guide and questions

Hello, my name is <<state name>>. Thank you for taking time to speak with me. I am <<state position and describe role>>. We are working with the American Medical Association and Johns Hopkins Medicine, who are partners in leading an initiative called "Improving Health Outcomes: Blood Pressure." The goal of the initiative, which we call "IHO: BP," is to improve blood pressure control for patients with uncontrolled high blood pressure, also known as hypertension. <<Or INSERT your practice/health center initiative information here>>

Before we begin, I'd like to go over a few things. First, our interview should take <<30 minutes>>. There are no right or wrong answers, so please feel open to share your thoughts and experiences when responding to any questions. To be sensitive to time, if we find ourselves going off track or topic, I may interrupt you to steer us back to the question. We have a fair amount to discuss and I am eager to hear your thoughts as well as give you some time to ask me questions. <<State who is taking notes>> will be taking notes just to capture the details of this interview.

Potential interview questions: <<Modify as needed for your practice/health center initiative>>

1. We ask this of all candidates: do you or your family have any financial relationships, like stocks or other investments, with health care organizations, such as pharmaceutical companies, hospitals or health plans? <<This question is to identify any conflict of interest. Delete if not applicable>>.

2. Help us understand a bit more about your background. Please tell us about yourself.
(Prompt with examples, such as: Tell us about your educational background, professional experience, family and hobbies, etc.)

3. We're going to shift gears a bit and spend a little time talking about your past experiences as an advisor or an active volunteer committee member for other programs or organizations. Can you tell us about some of these? (Prompt with examples: assisting to plan an event for a local food bank, school, etc.; working with an advocacy committee for a health organization; how long have you been involved in these activities?)

- How comfortable are you expressing your opinions in a group based on your previous experiences? What sort of group dynamics, in your previous experience, contribute to you feeling comfortable expressing your opinions? (*Prompt: How many people in the group, etc.*)

- Tell us about a time when you've been in a group situation and someone had a different opinion than you. How did you handle this? Was there anything you did that was helpful to resolve the situation?

4. Now, we are going to focus on conditions like heart disease. We would like to ask you about your experiences with managing high blood pressure, or other diagnosed condition, either for yourself or others.

- Using your experience with managing (*hypertension or other diagnosed condition in response to Question #4*) either for yourself or others, please describe any specific things that doctors or staff have done or said with you or your family that you found to be especially helpful?

- What about things with your health care that you've experienced where you thought, "That could have been done better"?

5. If you could change one thing about the health care you and your family received for (*high blood pressure or other diagnosed condition in response to Question #4*), what would it be? (*Prompts: These could be related to health insurance, reimbursement issues, care coordination, lack of time with your physician, providing additional resources after being put on hypertension medication.*)

6. Do you have any questions for us?

(*Interview note: Briefly describe next steps and that we're still in the process of interviewing candidates, but will be reaching out to them with a decision over the next few weeks.*)

Thank you for your time. It was pleasure speaking to you.

Table 1. Selection criteria for patient and family advisor candidates

(*This table can be modified to fit the needs of your practice.*)

This table provides an overview of important criteria to consider when selecting PFAs, as well as examples of requirements/qualifications you can use to assess candidates.

Selection criteria domains	Requirements/qualifications
<p>Availability (Refer to candidate's application for this information)</p>	<ul style="list-style-type: none"> • Duration of commitment: One year • In person meetings: Two or three in 12-month period • Monthly calls (30–60 minutes in length)
<p>Level of interest (Refer to candidate's application for this information)</p>	<ul style="list-style-type: none"> • Help develop or review informational/educational materials for patients and family members • Recommend community-based products and programs, and assist with developing relationships throughout communities • Identify practice resource needs that could be developed as potential products and programs • Help improve the patient and family role in care decision-making • Other issues of interest
<p>Selection criteria (Rating scale of 1 – 5)</p> <p>(Rating scale of 1 – 5) Poor = 1; Fair = 2; Average = 3; Good = 4; Excellent = 5</p>	<ul style="list-style-type: none"> • Good first impression • Friendly • Knowledge of their own/others medical condition • Enthusiastic • Passionate • Answered questions and communicates well • Experience working collaboratively in groups • Average rating of above criteria • Overall impressions