Interview guides, activities, and initial prototype

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INTERVIEW GUIDE

Postpartum patients

Participant demographics
Age
Type of insurance
Race (self-identify)

Introduction
Thank you for having us. We will be asking about your experience with the healthcare system, your experiences with insurance and how you think about the financial costs of your pregnancy.

A. Pregnancy in general
   ACTIVITY: PICTURE PULL
   To start, We’d like to understand how you are feeling about your pregnancy. We’ve brought some pictures that show different feelings. Can you pick two pictures that show how you are feeling about your pregnancy? There’s no right answer and whatever you choose is totally personal to you.
     - [First picture] Why did you pick this picture? What does that mean to you related to your pregnancy?
     - [Second picture] Why did you pick this picture? What does that mean to you related to your pregnancy?

   1. When did you give birth?
   2. Tell us about when you first realized you were pregnant.
   3. How are you emotionally feeling about your recent pregnancy?
   4. How are you physically feeling with your recent pregnancy?

B. Pregnancy care in the home
   5. What did you do to take care of yourself during pregnancy?
   6. Are there people in your life who are helping you with your pregnancy? If so who, and in what ways?

   ACTIVITY: CARE CIRCLE
   Step 1: Make a stick figure drawing of all the people who helped you in your pregnancy. This could include relatives, neighbors, doctors, and other professionals.
     - When you sketch this out, please think broadly about what “support” might mean. Support can take many forms, such as driving you to a doctor’s appointment, preparing food, or checking on you.
   Step 2: Label everyone and what they do to support you.
   Step 3: Draw a star (*) on your sketch next to the tasks and people you feel are most important. In the space below, please describe how these tasks and people are important.
   Step 4: Draw a big exclamation point next to anyone you feel is essential in supporting you. Explain how each person you marked is essential.
7. Were there any other resources do you used during your pregnancy?
   Prompts:
   - Any apps or websites or books that you use?
   - Any there any people you ask for advice in addition to your doctor? Maybe a counselor?

C. Medical pregnancy care

   8. Tell me about the last medical visit you had related to after-birth care.
   9. Tell me about the medical care related to your pregnancy you have received.
      Prompts:
      - Are you comfortable with the care you received?
      - Was there anything standing in the way of the care you wanted?
      - What have you learned from your visits to the clinic?
      - Did anyone go with you to your clinic visits?

   10. Let’s talk about the communication between you and your OBGYN. During a typical visit did you ask questions? What kind of questions?
      Prompts:
      - Did you feel like your OBGYN listened to you?
      - What kind of topics did you discuss with your OBGYN?

   11. How do you feel about your pregnancy health care? If you were to be pregnant again, is there anything that you would change from the first time?

D. Pregnancy journey and medical costs

   ACTIVITY: PREGNANCY JOURNEY MAP

Step 1: Let’s talk about the key moments you had during your pregnancy. We have some common key moments here for you to use and some blank cards for you to add moments.

Step 2: We also have 5 surprise stickers. What surprised you during your pregnancy?

Step 3: Thinking back to when you first realized you were pregnant, what are some out-of-pocket costs?
      Prompts:
      - Did you do an amniocentesis?
      - Did you do an ultrasound?

Were any of those costs a surprise?
      Prompts:
      - At delivery?
      - After the delivery?

Step 4: Did you talk to anyone about these costs?
      Prompts:
      - The front desk?
      - Your doctor?
      - Social services?
      - Your family?

How important was it to have conversations with your OBGYN about possible cost of your care?
Prompts:
- Before the care?
- After the care?

Did you feel comfortable talking to your OBGYN about the medical costs of your pregnancy?
- If not, is there anything that would help make you comfortable?

E. Experiences with insurance
12. When did you first get insurance? Tell me about your experiences with insurance.
13. When you have used your insurance at the clinic during your pregnancy or giving birth, was there anything that you were surprised insurance covered?
   a. Anything that you were surprised your insurance did not cover?
14. How do you normally receive medical bills? When you receive them, what do you do with them?
   a. Do you use anything to help you keep track of your medical bills? Can we see how you store them? Do you use any tools to help you track your bills?
15. Is there anything about having insurance that has surprised you?
16. Is there anything that you know now that you wish you had known about insurance before you signed up?
17. Is there any advice you would give to pregnant women who are new to insurance?

F. Tool evaluation
18. Looking at this tool, what are your initial impressions?
19. Thinking back to when you were pregnant, could you imagine your doctor using this tool during cost-of-care conversations?
   a. What would your response be? Why?
20. Is there any information that you would like to know about cost-of-care that is not covered by this tool?
21. If you received this tool in your doctor’s office, what might you do with it?

Wrap-up
22. Is there anything related to your pregnancy, the cost of medical care and cost-of-care conversations that we did not ask you about that you wish we had asked you about?
INTERVIEW GUIDE

Prenatal patients

Participant demographics
Age
Type of insurance
Race (self-identify)

Introduction
Thank you for having us. We will be asking about your experience with the healthcare system, your experiences with insurance and how you think about the financial costs of your pregnancy.

A. Pregnancy in general
ACTIVITY: PICTURE PULL
To start, we’d like to understand how you are feeling about your pregnancy. We’ve brought some pictures that show different feelings. Can you pick two pictures that show how you are feeling about your pregnancy? There’s no right answer and whatever you choose is totally personal to you.
  - [First picture] Why did you pick this picture? What does that mean to you in relation to your pregnancy?
  - [Second picture] Why did you pick this picture? What does that mean to you in relation to your pregnancy?

1. How far along are you in your pregnancy?
2. When did you learn you were pregnant?
3. What do you know about your pregnancy? How is everything progressing so far?
4. How are you emotionally feeling about being pregnant?
5. How are you physically feeling with your pregnancy?

B. Pregnancy care in the home
6. What are you doing to take care of yourself during pregnancy?
7. Are there people in your life who are helping you with your pregnancy? If so who, and in what ways?

ACTIVITY: CARE CIRCLE
Step 1: Make a stick figure drawing of all the people who are helping you during your pregnancy. This could include relatives, neighbors, doctors, and other professionals.
  - When you sketch this out, please think broadly about what “support” might mean. Support can take many forms, such as driving you to a doctor’s appointment, preparing food, or checking on you.
Step 2: Label everyone and what they do to support you.
Step 3: Draw a star (*) on your sketch next to the tasks and people you feel are most important. In the space below, please describe how these tasks and people are important.
Step 4: Draw a big exclamation point next to anyone you feel is essential in supporting you. Explain how each person you marked is essential.

8. Are there any other resources you use?
   
   Prompts:
   - Any apps or websites or books that you use?
   - Any there any people you ask for advice in addition to your doctor? Maybe a counselor?

C. Medical pregnancy care

9. Tell me about the last medical visit you had for your pregnancy.

10. Tell me about the medical care related to your pregnancy you have received so far.
    
    Prompts:
    - Are you comfortable with the care you care receiving?
    - Is there anything standing in the way of the care you want?
    - What have you learned from your visits to the clinic?
    - Does anyone go with you to your clinic visits?

11. Let’s talk about the communication between you and your OBGYN. During a typical visit do you ask questions? What kind of questions?
    
    Prompts:
    - Do you feel like your OBGYN listens to you?
    - What kind of topics do you discuss?

12. How do you feel about your pregnancy health care? Is there anything you would change?

D. Pregnancy journey and medical costs

ACTIVITY: PREGNANCY JOURNEY MAP

Let’s talk about the key moments in your pregnancy so far.

Step 1: Let’s mark where you are today.

Step 2: Let’s talk about the key moments you have had during your pregnancy. We have some common key moments here for you to use and some blank cards for you to add moments.

Step 3: We also have 5 surprise stickers. What has surprised you so far?

Step 4: Tell me about the events you are anticipating in the coming months of your pregnancy.

Prompts:
- At delivery?
- After the delivery?

Step 5: Thinking back to when you first realized you were pregnant, what have been some of the out-of-pocket costs?

Prompts:
- Did you do an amniocentesis?
- Did you do an ultrasound?

What costs are you anticipating in the coming months?
Prompts:
- At delivery?
- After the delivery?

**Step 6:** Did you talk to anyone about these costs?

Prompts:
- The front desk?
- Your doctor?
- Social services?
- Your family?

**Follow up questions:**
How important was it to have conversations with your OBGYN about possible cost of your care?
- Before the care?
- After the care?

Did you feel comfortable talking to your OBGYN about the medical costs of your pregnancy?
- If **not**, is there anything that would help make you comfortable?

E. Experiences with private health insurance

13. When did you first get private health insurance? Tell me about your experiences with insurance.

14. When you have used your private health insurance at the clinic during your pregnancy so far, was there anything that you were surprised insurance covered? Anything that you were surprised your insurance did not cover? (Example: co-pay)
   a. Has anything specific come up in the last 3 months that you were surprised wasn’t covered?

15. How do you normally receive medical bills? When you receive them, what do you do with them?
   a. **If participant talks about storing and tracking medical bills:**
      - Do you use anything to help you keep track of your medical bills? Can we see how you store them?
      - Do you use any tools to help you track your bills?

16. Is there anything about having private health insurance that has surprised you?

17. Is there anything that you know now that you wish you had known about this kind of insurance before you signed up?
   a. Have any unexpected costs or coverage issues come up that you wish you would have known about before?

18. Is there any advice you would give to other pregnant women who are new to private health insurance?

F. Tool evaluation
This is a draft of a tool we have designed to support cost-of-care conversations between doctors and patients like you. This is our best guess at what a good tool should be and we know that it is not quite
right. We would like your help making it better. Please feel free to be honest with us about what is wrong with this tool.

19. Looking at this tool, what are your initial impressions?
20. Could you imagine your doctor using this tool during cost-of-care conversations?
   a. What would your response be? Why?
21. Is there any information that you like to know about cost-of-care that is not covered by this tool?
22. If you received this tool in your doctor’s office, what might you do with it?

Wrap-up

23. Is there anything related to your pregnancy, the cost of medical care and cost-of-care conversations that we did not ask you about that you wish we had asked you about?
INTERVIEW GUIDE

Call center staff

A. Introduction
First, we would like to know a little bit more about your role and your interactions with pregnant patients.
1. Tell us what your day to day role is here. How long have you been at this facility?

B. Role in the patient experience
2. How do you think about the call center’s role in the patient experience?
3. What are the biggest challenges in delivering that experience to patients?
4. What are some common questions your employees handle?
5. When during a patient’s pregnancy does your staff interact with them?
   (for supervisor only)

C. Pregnant women and the call center
We would like to understand what happens when a pregnant woman calls for an appointment.
6. Can you describe to us how call center staff are instructed to handle them?
7. Is there a script or other supports that call center staff are given?
8. What are all the roles of the call center in this scenario? For example, do they schedule the appointment or enter any data?
9. How does information travel between the call center and the clinic where a patient is scheduled?
10. Walk me through the flow of information from the call center to various other groups. Where does the insurance information go? And what happens next?
11. Where does the patient information go? And what happens next?

D. Cost-related questions and the call center
12. Do you have patients asking about costs when they call? What kinds of questions do they ask?
13. How do your staff answer these questions?
   a. If a patient asks, ‘How much will my appointment cost me?’
   b. If a patient asks, ‘How much will my ultrasound or test cost me?’
   c. If a patient asks, ‘I have to visit the hospital often and I am struggling to afford transportation and parking, is there something you can do to help with that?’
14. Do you think your employees should be having cost-related conversations with patients?

E. Staff-initiated conversations
15. What cost-related topics are you most likely to raise with patients?
   a. Do you take the patient’s insurance into account? How do you know their insurance status?
16. What are the conversations you WISH you were having with patients that would be in their best interest?

F. Experiential issues
17. Do you have any hesitations or concerns about discussing costs with patients?
INTERVIEW GUIDE
Clinicians (nurses, doctors, medical assistants, physician assistants, medical technicians) + frontline staff

Participants Information
Gender (male/female/other)
Age range
Race (self-identify)
Job title and facility

We are a research team from the Institute of Design and the Sinai Urban Health Institute. We are working with the Robert Wood Johnson Foundation to help think about how to move cost-related conversations about care and treatment options into the routine care of patients. For this project, our job will be to design a communication tool to help OB/GYN staff and pregnant women talk about costs, both anticipated and possible. Today we would like to ask questions about these cost conversations in your own day-to-day work.

A. Introduction
First, we would like to know a little bit more about your role and your interactions with pregnant patients.
1. What is your day-to-day role here? How long have you been at this clinic?
2. How often do you interact with/see pregnant patients?

B. Mapping the appointment
Help us understand the rhythm of a typical appointment with a high-risk pregnant woman. Maybe we could start with your last prenatal appointment. No names please! We are just interested in understanding the patient experience.
3. Where are you when you first saw her?
   Prompts
   - What did you discuss first? How long did that take? Is that typical?
   - Then what happens? How much time did that take? Is that typical?
   - How long did you spend with her? Is that typical?
   - Does this timeline look approximately right?

4. Who are all the other staff who might be involved in this patient’s care before the patient sees you? After the patient sees you?
5. Are there supports or documents or models that you used with your last patient? Do you have support tools that you like to use with your prenatal patients?

C. Mapping typical treatments
We’d like to use this template to map out the most common treatments for your patients’ pregnancies and deliveries. We will also use this map to chart more broadly any cost-related conversations you typically have patients throughout prenatal, delivery and postpartum care.

6. To start, when do you interact with patients? (prenatal, delivery, etc.) [use timeline to pinpoint]
7. What are the most common treatments for your pregnant patients? Are there any treatments missing from this timeline? Where do they belong on the timeline?

D. Mapping high-risk treatments
8. When does a patient become high-risk?
9. What kinds of treatments do they require and how frequently?
10. What kind of unplanned complications or treatments occur?

E. Interactions around cost
11. Do you ever have cost-related or billing-related conversations with your pregnant or postpartum patients about any of these treatments?
   If no: Who do patients typically have these conversations with? Would you be willing to introduce us?
   If yes: Can you say more about the nature of those conversations? Who initiates those conversations? What are they about?
12. In your experience, does the patient’s insurance play a role in your conversation? Do you know your patients’ insurance status?

F. Patient-initiated conversations
Let’s talk more specifically about conversations that patients initiate about cost.
13. Can you tell me about the last cost-related conversation initiated by a patient?
   a. What was the topic?
   b. How long did the conversation last?
   c. What was your advice?
14. Is that patient’s question common or typical, in your experience? Why or why not?
15. What topics are patients most likely to ask cost-related questions about? Let’s add these to the map.
16. When patients raise cost issues, are you more likely to offer cost-reduction strategies or change-of-care strategies?
   a. cost savings strategies (co-pay support, free samples)
   b. care change strategies (changing drugs, frequency, etc).
17. Can you estimate how many cost-related conversations patients have initiated with you in the last 30 days?

G. Clinician-initiated conversations
18. Do you initiate cost-related conversations with your patients? Why or why not?
19. What cost-related topics are you most likely to raise with patients? Let’s add these to the map.
20. Can you tell me about the last conversation you initiated with a patient about costs of care?
   What was the topic? Is that a topic you commonly raise with your patients?
21. Let’s role play. Can you pretend I was that last patient and initiate that conversation with me as you did with her?
22. What was your advice?
23. What was the patient’s response?
24. Can you estimate how many cost-related conversations you’ve initiated with your patients in the last 30 days?
25. What are the conversations you WISH you were having with your patients, that would be in their best interest?
26. Can you describe your ideal role in cost conversations with patients? Who else would ideally be involved?

H. Acceptability issues
27. Do you have any hesitations or concerns about having cost-related conversations with your patients? Are there conversations you don’t want to have or are unwilling to have?
28. What are the tough moments in having—or trying to have—cost-related conversations with patients?
29. Do you have any successful tactics you use during these moments?
30. If you were tasked with writing Best Practice Guidelines for how to have cost-of-care conversations, what would you write to help your fellow practitioners get these conversations right?

I. Conversation topics and priorities
We’ve covered a lot of ground about topics and placement of cost-related conversations. Now I’d like your help in prioritizing these.
31. What are the most important pregnancy, delivery or postpartum issues that you think you need to have cost conversations about? Let’s mark those on the map.
32. What are the top 3 most important conversations to have with the kinds of pregnant patients you see?
33. Ideally, what are your key talking points for each of these topics?

J. Tool feedback
We’d like finish up by showing you some early stage prototypes for your feedback. They look finished, but they’re not. We know it’s not right yet, and we want you to tell us what’s wrong with it. Its goal is to help support OB/GYN staff to talk about costs, especially to high-risk pregnant women who may be overwhelmed by costs associated with increased fetal monitoring.
34. We’ve chosen to focus our cost conversation tool on out-of-pocket costs based on frequency of visits. From your experience, does this make sense as a focus?

[For each prototype]
35. Can you see yourself using something like this with your patients? Why or why not? How would you use it?
36. In your experience, what’s missing from this that might improve its effectiveness? Feel free to mark it up.

For all three prototypes...
37. What might be the benefits of using something like this?
38. Who else in the clinic should have a tool like this?
39. Engage in magical thinking: if you could have anything to help you have these conversations, what would you ask for?

That was amazing. Would you mind if we contacted you again for a follow-up interview? Thank you!
INTERVIEW GUIDE

Executive and Managerial staff

Participants Information
Gender (male/female/other)
Age range
Race (self-identify)
Job title and facility

A. Intro
First, we would like to know a little bit more about your role and your interactions with pregnant patients.

1. Tell us what your day-to-day role is here? How long have you been in this role?
2. What is your role in patient cost conversations?

B. Cost conversations across the health system, within the unit
Next, we’d like to understand all the touchpoints in the system in which pregnant patients can or are having cost conversations.

3. Institutionally, where are all the points where pregnant patients might have cost conversations and who is answering them? (coordination, transparency between units)
4. At what point do patients intersect with your unit? What are all the steps/process that occur once they engage with your unit and staff? (hand-offs, insight into patient experience)
5. How do you conceptualize your role in the patient experience?
6. How does patient insurance affect that process? (Medicaid, uninsured, commercially insured, coverage, network, etc)
7. How do these conversation compare to cash-based services (e.g. abortion)?
8. What kinds of cost conversation supports – scripts, training, tools – are provided to employees to help these conversations?
9. What kind of supports do you wish you had to more effectively address patient cost concerns?

C. High-risk pregnancy costs
What kinds of issues related to costs are patients with high-risk pregnancy bringing to your unit?
   a. Treatment costs?
   b. Out of pocket costs?
   c. Indirect costs?
Show cost table with estimated indirect costs for high-risk pregnancy care
10. Have you ever seen a cost estimate for high-risk pregnancy like this before? Is this realistic, in your opinion?
11. Do you have any concerns about discussing these costs with patients?

C. Cost conversation with clinicians (use with those with clinical contact only)
12. In your opinion, should we be helping clinicians have cost-of-care conversations with patients?
13. Can you speculate on the acceptability of and barriers to clinicians having cost conversations with patients?
14. What would be involved to create the organizational change to allow and prepare clinical staff to have cost conversations with patients? (performance measures, compensation, Joint Commission, etc).

D. Tool feedback

We’d like finish up by showing you some early-stage prototypes for your feedback. They look finished, but they’re not. We know it’s not right yet, and we want you to tell us what’s wrong with it. Its goal is to help support OB/GYN staff to talk about costs, especially to high-risk pregnant women who may be overwhelmed by costs associated with increased fetal monitoring.

4. We’ve chosen to focus our cost conversation tool on out-of-pocket costs based on frequency of visits. From your experience, does this make sense as a focus?

[For each prototype]

5. In your experience, what’s missing from this that might improve its effectiveness? Feel free to mark it up.

6. What might be the benefits of using something like this?

7. Who else in the clinic should have a tool like this?

D. Wrap up

Are there others in this institution who you think we should talk to regarding cost-of-care conversations?

Thank you so much for your time!
ACTIVITY 1 FOR PATIENT INTERVIEWS

Picture pull projective photos
ACTIVITY 2 FOR PATIENT INTERVIEWS

Pregnancy journey map template (printed 11 x 17)
Initial interviews generated two relevant design directions: Option A utilized a checkbox design to highlight visit frequency for patients; Option B utilized a trimester-based grid to highlight visit treatment goals. Both prototypes included a worksheet positioned as cost-planning versus appointment-planning (tools A and B, respectively). Subsequent iterations refined components of both tools. The most preferred components were merged into a single, refined tool for final stakeholder review.