

Appendix - Patient Interview Protocol

Current Experience with Patient-Collected Data

Thank you so much for talking with us today. In your survey, you mentioned tracking your [recap from patient survey answers]. We'd like to learn more about your experiences today.

To start, I'd like to learn about how you currently use the data.

1. Could you please tell me about **one experience** -- maybe your best experience, maybe your worst, or just the most memorable -- when you share your tracking data with your health providers? *[probe for...]*
 - 1) What condition or conditions were you focusing on?
 - 2) What data did you work with?
 - 3) How did you collect the data? (i.e. mobile app, paper diary, excel sheet, handout or form)?
 - 4) Who did you share the data with?
 - a. probe: who suggested it? What was the goal?
 - 5) Did your [provider] ask you to collect it, or did you bring the data in on your own?
 - 6) *[If the provider asked the patient to collect it:]*
 - a. How did your [provider] instruct you to collect this data?
 - b. Did your [provider] provide you with any written instructions or pre-formatted record sheets?
 - c. How much time did your [provider] spend explaining how to collect this data?
 - d. ***[make sure to later ask:*** Earlier, you told me about a time when your [provider] asked you to collect and bring in data. Have you ever brought data in without your [provider] suggesting it? (then ask for details using the probes below)]
 - 7) *[If the provider did not ask the patient to collect it:]*
 - a. How did your data come up in your interaction with your [provider]?
 - b. What was your [provider]'s reaction when he/she first saw the data?
 - c. What was your [provider]'s reaction when he/she read or review the data with you?
 - d. What was your reaction to the review experience?
 - e. ***[make sure to later ask:*** Earlier, you told me about a time when you brought data in. Has your [provider] ever asked you to collect data, for your own use or for your [provider]'s review? (then probe for details using prompts above)]
 - 8) How did your [provider] review that data?
 - a. Did your [provider] review it in advance or after?

- b. Did you and your [provider] review it together in the office?
 - c. About how much time did they spend on it (in advance, during visit, or after)?
 - d. How satisfied or dissatisfied were they with the review or the data?
 - e. Did you verbally summarize the data?
 - f. Did you choose what to review or did your [provider] choose it?
 - g. Did you talk about goals (for tracking and for care)?
 - i. What are they?
 - ii. Did you talk about the progress and action items?
- 9) What did you use to review the data?
- a. [If digital] did you use a mobile app or a website to review?
 - i. Did you take notes? Did your [provider] take notes?
 - ii. Did your [provider] keep any record of your data?
 - iii. Have you ever changed any application?
 - [If yes] Why?
 - [If yes] Did you share that change with your health provider?
 - [If yes] How did they react?
 - b. [If paper], how did you and your [provider] work with it?
 - i. Did anyone make annotations on it?
 - ii. If yes, what were they?
 - iii. If not, why not?
 - iv. Did your [provider] make a copy or a record of your data?
 - v. Did you bring your data back?
- 10) What did you do after your [provider] reviewed your data?
- a. Did you change your tracking practice (items, frequency, etc.)?
 - b. If yes, how was it? If not, why not?
 - c. Have you ever used the notes from your [provider]'s review outside of the visit? How?
2. You mentioned in your survey that you also shared your data with [Get the list from the survey responses here]:
- 1) In what ways were the sharing experiences similar?
 - 2) In what ways were they different?
 - 3) Have you ever shared the same data among different medical team members? How did that work?
3. How often do [your health providers] review this data with you?
- 1) *Unless it is never or almost never:*
- a. Could you please describe your best experience with reviewing self-tracking data with [your health providers]? [*probe for: What made it go well? other questions above*]

- b. And how about your worst experience? *[probe for: What made it go poorly? What could have made it go better? other questions above]*
- 2) *[If never or almost never]:*
 - Why not? *[probe for what might make it useful/valuable]*
- 4. Have you ever shared with your healthcare provider outside of visit (by email, EHR, phone visit)?
 - 1) *Unless it is never or almost never:*
 - a. Could you please describe your best experience with reviewing self-tracking data with [your health providers]? *[probe for: What made it go well? other questions above]*
 - b. And how about your worst experience? *[probe for: What made it go poorly? What could have made it go better? other questions above]*
 - 2) *[If never or almost never]:*
 - Why not? *[probe for what might make it useful/valuable]*

Integration with Routine Clinic Visit

Next, I'd like to step back and ask some about how your use of this self-collected data fits -- or doesn't fit -- into your visits with health providers.

- 1. *Can you walk me through your most recent clinic visit during which you discussed your weight loss plan or IBS?*
- 2. *What was your goal for a visit?*
- 3. *If your data was reviewed during the clinic visit, what did you expect to get out? [Were those align with the goal for a visit?]*
- 4. *Who did you think should review the data? Why?*
 - 1) Would you consider reviewing this data with another member of your healthcare team?

Challenges and Barriers of Patient-Collected Data

What was challenging or not useful to review health information?

Before we wrap up, I want to ask if there's anything else you think we should know? Is there anything that you wished we had asked?