Establishing and Maintaining Relationships in the Healthcare Field

Fieldwork for Healthcare:
Guidance for Investigating Human Factors in Computing Systems
Chapter 3
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Outline

❖ Clinical Setting
  ➢ Gaining Access
  ➢ Participant Recruitment
  ➢ Clinician Consent
  ➢ Problems That May Arise

❖ Working With Patients
  ➢ Access Inside And Out Of Clinical Settings

❖ Researching Target Population
Choosing The Location

It is important to choose the proper location for your research:

**Academically Affiliated Hospitals:**
- Mission may involve research
- Policies and pathways in place to navigate the clinical research process

**Smaller Hospitals:**
- May appreciate the attention and opportunity to contribute to research
Gaining Access Through Key Enablers

Identify a key study enabler who will facilitate the project

- **Formal entry points:**
  - Research and Development Department,
  - research institute connected with the hospital,
  - formal pre-set processes

- **Top-Down Approach:**
  - Focus on managers
  - May not be the study enabler themselves they can put you in touch with the right people
  - Management approval is secured first

- **Frontline Approach**
  - Establishing contact with care providers in the specific clinical setting
  - Utilize network and online research to identify who may be interested in the topic of research
I need to study these elephants for my homework. But how?

I can help you with that!

Ouch! Ouch!

Can I talk to your herd about my research?

That was kind. Come meet my father.

I brought sweets for everyone that participates!

Can your research help us with these thorns?
Gaining Access In A Clinical Setting

How to build trust and good rapport with clinical staff?

- Informally observe before the study begins
- Engage staff members
  - Study Design Planning
  - Suggestions For Data Collection
  - Verifying Consent Practices
- Weave issues that the staff care about into your research plan
  - How will the study results be relevant for them?
Recruiting the Participation of Clinicians

Variety of possible roles for clinicians in the research study

- **Study/Clinical “Champion”**
  - Invested in seeing your project succeed
  - Assists with recruitment of others

- **Collaboration/ Co-Investigators**
  - Staff that are highly engaged in the study

- **Participants**
Ways of Gaining Consent

Although written consent is the gold standard to protect patients and make sure protocols are adhered to, they can sometimes be detrimental to recruitment.

- Written consent from a management lead and verbal consent can be given at a staff meeting
- E-mail consent forms to clinical staff
- Consider getting permission for forms to be waived

It is critical for the consent form to describe what information is being gathered, who it will be shared with and how.
Navigating Dynamic & Challenging Environments

- Currently there are many changes occurring in health care to reduce costs while improving the quality of healthcare
- Healthcare is characterized by steep hierarchies
  - In institutions in constant flux like hospitals, roles and responsibilities may adapt to the situation
- There are many specialties and subspecialties
  - This may create a bias towards one’s own specialty.
Patient Recruitment Inside A Clinical Setting

- Take guidance from staff about who may or may not be appropriate for the study
- Create comprehensive inclusion and exclusion criteria
- Clinician team may be able to distribute participant invitation letters that detail the study and how to get involved
- Useful for the researcher to work with the clinician team on recruitment
Patient Recruitment Outside A Clinical Setting

- **Online Recruitment**
  - May be difficult depending on location, timing and population for each site

- **Local Support Groups**
  - Allow for face-to-face interaction but needs a greater understanding of who makes up these groups

- **E-mail Lists/Non Profit Social Media Pages**
  - May limit your population or interact with people that are already very engaged in caring for their condition

- **Posting Physical Posters**

- **Recruiting From A Clinical Setting**
  - May limit demographics depending on the geography of the institution
  - Patients who are having more difficulty managing their care
Researching The Target Population

- **Literature Review**
  - Goal: Understand the patient condition, symptoms, treatments and implications for quality of life

- **Support Groups**
  - Goal: Understand user population
  - Patients and caregivers may be in attendance

- **Online Social Media**
  - Surveying forums and blogs provides a less invasive way to access target population and caregivers

- **Convenience Sampling**
  - Sampling members of the target community that you already have access to (friends/family)

- **Self-Studies**
  - Researcher uses the technology of interest as though they are the patient

- **Accessing Clinicians**
  - Talk to clinicians about their patients can give insights to patients' and caregivers' perspectives

- **Patient and Public Involvement**
  - Activities can help researchers learn about their target population and assist with recruitment
Questions?