The Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families

Implementation Quick Start Guide

Medication Management

Agency for Healthcare Research and Quality

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What Is the Medication Management Strategy?

The Medication Management strategy is an effort to engage patients and families to actively participate with you in developing a complete and accurate medication list from which you can complete medication reconciliation. Patients are asked to bring in all the medications they take, both prescribed and over the counter, including non-oral medications such as injections, inhalers, ointments, and drops, as well as medications they only take occasionally.

Staff within your practice will work with the patients and their families to develop a complete and accurate medication list, and clinicians will conduct medication reconciliation based on the complete and accurate list. Several tools are available with this strategy.

Why Use the Medication Management Strategy?

According to the Centers for Disease Control and Prevention (CDC), more than two-thirds of primary care office visits involve drug therapy, with 2.3 billion medications ordered or provided each year. Almost half the people in the United States have used at least one prescription medication in the last 30 days, while one in five has used at least three.[1]

Patient safety issues related to medication reconciliation and medication management are well documented.[2-5] One study found that adverse drug events result in as many as 4.5 million ambulatory visits (office and emergency department) each year.[6]

In the primary care setting, medication safety issues include prescribing errors, medication contraindications, overprescribing, underprescribing, and patient adherence. Patients are especially vulnerable at the interfaces of care—between primary care and specialist or between primary care and acute care.

Several publicly available tools are useful for addressing medication issues.[7-11] The foundation of all tools for addressing issues of medication reconciliation and medication management is a **complete and accurate medication list**. The Medication Management strategy described here provides that foundation.

The materials for this strategy will help you engage your patients and their families to develop a complete and accurate medication list. It will also help you identify patient behaviors that may be putting them at risk for an adverse drug event, such as over- or underdosing, missing medications, and other important contextual factors limiting adherence.

Tools for Medication Management

The Medication Management strategy includes tools for patients and families, clinicians, and practice staff.

For All

Material	Uses	Description and format
Medication List	Prepare a complete and accurate medication list.	▪ The medication list is a simple list prepared by practice staff who engage with the patient or family member during preparation. The list is then used by clinicians for medication reconciliation. ▪ Format: 1-page list (additional pages may be used as necessary).

For Patients and Families

Material	Uses	Description and format
Patient Information Card	Remind patients to bring all their medications to their appointments.	▪ The Patient Information Card is provided to patients along with an appointment reminder before the appointment. The Patient Information Card reminds patients to bring all the medications they take with them to the appointment. ▪ Format: Available in both postcard and reminder card sizes.
Patient Fact Sheet	▪ Inform patients and family members about the Medication Management strategy. ▪ Encourage patient and family to participate in medication management.	▪ This fact sheet explains the purpose of developing a complete and accurate medication list, the role of the patient and family member, and the importance of the medication list. ▪ Format: 1-page handout, suitable for handing to patients or posting on office walls.

For Clinicians

Material	Uses	Description and format
Common Barriers to Medication Adherence	Help clinicians discuss barriers and facilitators of medication filling and adherence with patients and their families.	▪ This job aid can be used to help clinicians discuss the core challenges to filling and adhering to prescribed medications with patients and family members. ▪ Format: Available in both 1-page and pocket card sizes.

For Practice Staff

Material	Uses	Description and format
Procedure: Engaging Your Patient To Create a Medication List	Inform practice staff of the procedure for developing a complete and accurate medication list.	- Practice staff can use this procedure to learn the steps for engaging patients to develop a complete and accurate medication list. (This procedure is based on the sample process and may need to be customized to the practice-specific procedure.) - Format: 2-page procedure brief.
Checklist: Creating a Medication List	Remind practice staff of the process for developing a complete and accurate medication list.	- Practice staff can use this brief checklist as a reminder of the steps to take in engaging patients to develop a complete and accurate medication list. It is meant to be used as a job aid by staff who are already familiar with the process. (This checklist is based on the sample process and may need to be customized to the practice-specific procedure.) - Format: 1-page checklist.

For Practice Administrators

Material	Uses	Description and format
Sample Process for Medication Management Strategy	Provide practices with a sample process for using the Medication Management strategy.	- Practices can use this guidance to help them develop the processes and procedures needed to implement the Medication Management strategy. - Format: Multipage document

Resources Needed To Implement Medication Management

The primary resource needed for the Medication Management strategy is the time required for practice staff to engage patients and their families to prepare the medication list. Other resources needed are modest, such as printing the patient fact sheet, postcards, and medication lists.

- **Staffing.** No new staff roles are needed to implement the Medication Management strategy. An increased staffing level may be needed to cover the additional time spent engaging patients and families in developing the medication list and conducting a brown-bag medicine review.

- **Costs.** Material costs include printing the materials and possibly laminating the patient fact sheet (for posting in the office).

- **Time.** Additional time is needed for practice staff to engage with patients and families to prepare the medication list and identify patients at risk for safety events. Having a complete and accurate medication list may help save clinicians time during medication reconciliation and will improve the safety of the care delivered.

Implementing the Medication Management Strategy

Specific implementation of the Medication Management strategy will depend on your practice's individual characteristics. The goal of the Medication Management strategy is to have a complete and accurate medication list for every patient at every visit. However, since the strategy likely requires more time than current practice, you may choose to focus on initial and annual visits, where the process might be of most value.

Consider using the strategy more frequently with more vulnerable populations, such as older patients, patients with polypharmacy issues, and patients with memory challenges. As the process becomes more routine, you can expand its use.

This Medication Management strategy uses a paper-based medication list. A paper-based list was purposely included to encourage better patient engagement and to accommodate primary care practices that do not use electronic health records (EHRs). If you use an EHR that includes the functionality for a medication list, you may be able to meet the intent of this strategy using the EHR. It will be important, though, to ensure that the patient or family member is fully engaged during the creation of the medication list.

The following steps are recommended but may be adjusted for your practice's individual characteristics (e.g., use of an EHR):

Step 1. Obtain leadership buy-in, and identify a champion.

Strong leadership and staff engagement are important to successful implementation. Identifying a champion within your practice can help guide you in implementing and refining the medication management strategy in your practice.

Step 2. Develop a process for preparing a complete and accurate medication list.

Collaborate with the clinicians and staff within your practice to develop a process to prepare a complete and accurate medication list. The *Sample Process for Medication Management Strategy* is available to assist you in designing a process for engaging patients and families in preparing a medication list.

The sample process recommends using the staff member who rooms the patients to work with patients and their families to develop the medication list, but selecting the staff member who fulfills the function is a practice-specific decision.

Step 3. Make all team members aware of the Medication Management strategy and tools.

Spread the word. Inform all team members about your processes, and make sure they are familiar with the tools and their roles in supporting medication management.

Step 4. Make patients and families aware of the Medication Management strategy and tools.

A patient fact sheet is provided to help you inform your patients and their families about preparing a complete and accurate medication list. Make the patient fact sheet easily accessible throughout the practice. You can print and distribute it to patients and families or display it strategically in the office. Talk with patients about the importance of the medication list and medication management and answer any questions your patients and families have.

Step 5. Evaluate and refine your process.

Assess whether a complete and accurate medication list is prepared and reconciled for every patient at every visit. Identify and address any barriers to the medication management strategy.

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Implementation Notes

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