Medication Management

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

Speaker

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Objectives

- Review the key threats to patient safety in primary care settings and interventions to engage patients and families to improve safety
- Describe the role and value of the Medication Management strategy in improving patient safety
- Identify strategies for implementing the Medication Management strategy in primary care settings

Guide – Project Goals

- Meaningful engagement with patients and families in ways that impact safety, not just quality
- Based on evidence
- Tools that are easy to use
- Tools for practices who have not done much in this area

Key Project Deliverables

- Environmental Scan
- Four Case Studies of Exemplar Practices
- Four Interventions to Improve Safety by PFE
- Final Guide

Key Threats & Promising Interventions

Threats to Patient Safety

- Breakdowns in communication
- Medication management
- Diagnosis and treatment
- Fragmentation and environment of care

Promising Interventions

- Shared Decisionmaking
- Patient and Family Advisory Councils (PFAC)
- Team-based Care
- Medication Management
- Family engagement in care
- Structured communication tools

Patient & Family Engagement in Primary Care

Four Interventions

- Teach-Back
- Be Prepared to be Engaged
- **Medication Management**
- Warm Handoff

What is the Medication Management Strategy?

- Develop a complete & accurate medication list
  - Patients and family members bring all their medications – OTC and prescriptions
- Complete medication reconciliation using the accurate medication list
  - Identify & correct safety issues

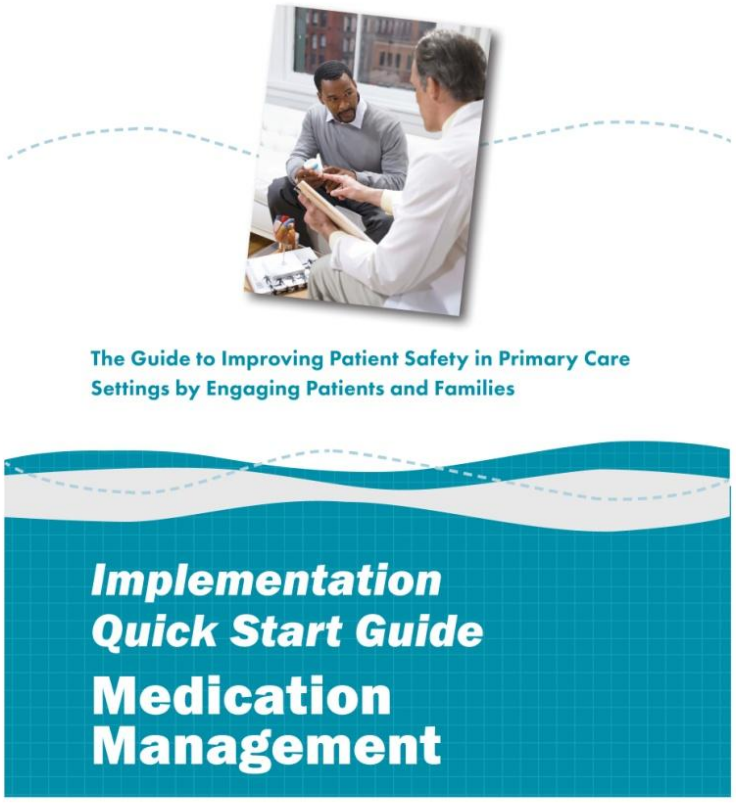
Why Use the Medication Management Strategy?

- 2.3 billion prescriptions are prescribed by primary care clinicians each year (CDC)
- Adverse drug events result in as many as 4.5 million ambulatory visits each year [1]
- Medication reconciliation improves patient safety and reduces adverse drug events:
  - prescribing errors, medication contraindications, overprescribing, under-prescribing, and patient adherence

Medication Management – Safety Checks

- Challenges in how the patient is taking the medication
- Possible interactions with other medications or over the counter medicines
- Overdoses
- Appropriateness as a treatment
- Avoidable regimen complexity
- Avoidable side effects[9]

Getting Started



- **Step 1**
  - Identify a Champion and get Leadership Buy-in
- **Step 2**
  - Develop processes for using Medication Management Tools
- **Step 3**
  - Train team members and initiate implementation
- **Step 4**
  - Introduce Medication Management Materials to patients
- **Step 5**
  - Evaluate and refine

Step 1. Leadership Buy-in

- Identify a Medication Management practice champion
- Obtain leadership buy-in and support
- Identify a process improvement team
  - ❖ Engage a patient or two in developing your plan

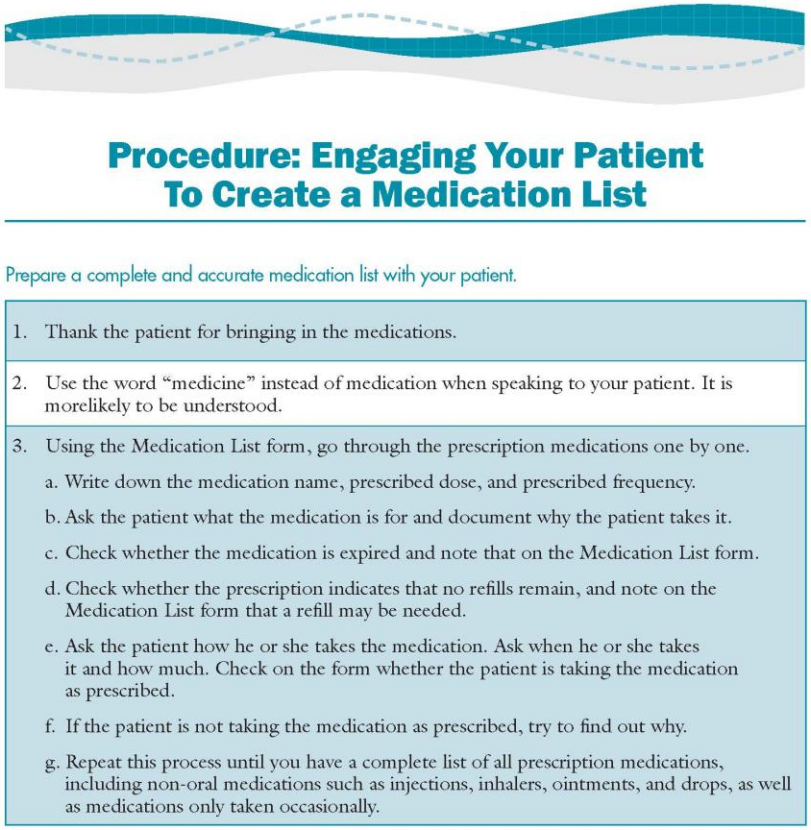
Step 2. Design Implementation

- Identify a team to help design processes for each of the Medication Management strategy tools
- Identify resources for implementation

Design Support

- Before Appointment
- Rooming the Patient
- During the Exam
- Electronic Health Record

Reviewing the Medicines



Procedure: Engaging Your Patient To Create a Medication List

Prepare a complete and accurate medication list with your patient.

1. Thank the patient for bringing in the medications.
2. Use the word "medicine" instead of medication when speaking to your patient. It is morelikely to be understood.
3. Using the Medication List form, go through the prescription medications one by one.
   a. Write down the medication name, prescribed dose, and prescribed frequency.
   b. Ask the patient what the medication is for and document why the patient takes it.
   c. Check whether the medication is expired and note that on the Medication List form.
   d. Check whether the prescription indicates that no refills remain, and note on the Medication List form that a refill may be needed.
   e. Ask the patient how he or she takes the medication. Ask when he or she takes it and how much. Check on the form whether the patient is taking the medication as prescribed.
   f. If the patient is not taking the medication as prescribed, try to find out why.
   g. Repeat this process until you have a complete list of all prescription medications, including non-oral medications such as injections, inhalers, ointments, and drops, as well as medications only taken occasionally.

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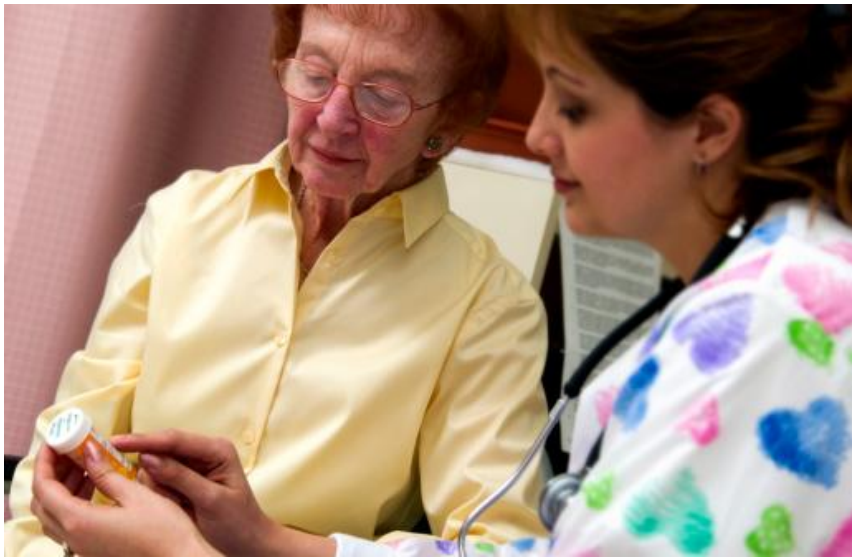
Guide to Patient and Family Engagement in Primary Care

- Detailed process for engaging patients in medicine review
- Supported by additional checklists

Step 3. Orient Practice Staff



- Information about the Medication Management Strategy for:
  - Practice Staff
  - Clinicians
- Provide overview of tools and how to use to enhance engagement

Medication List

Patient Name

_____

Date of Birth: _____

Date of Visit: _____

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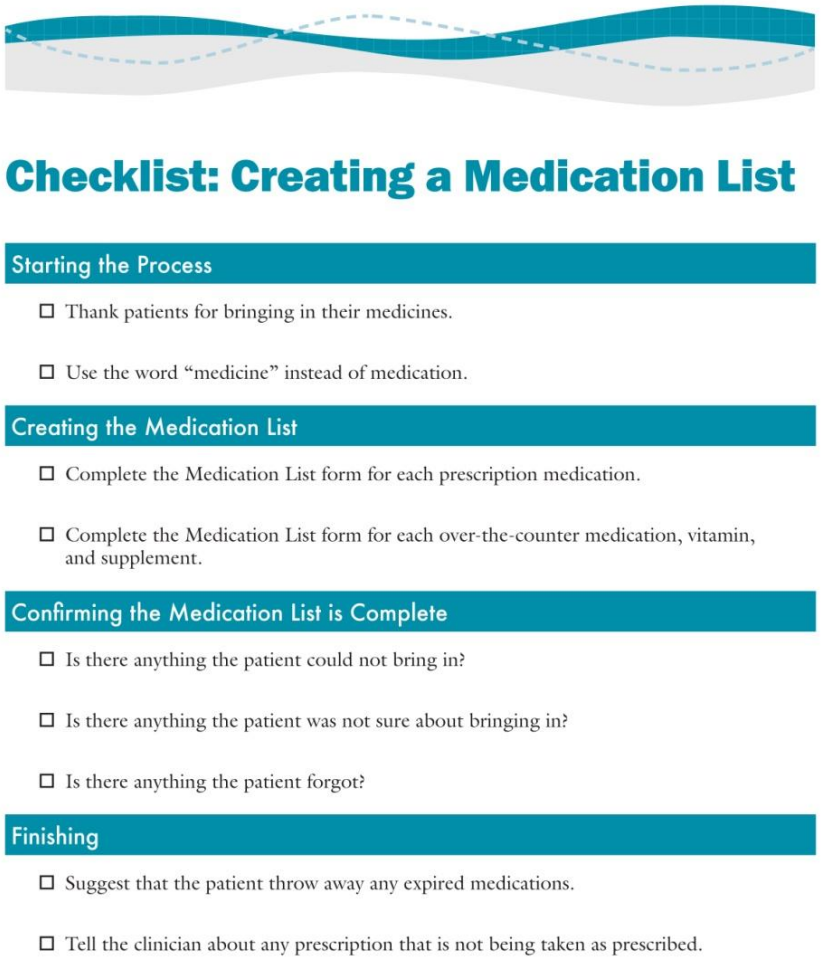
Prescribed Medicines From Your Doctor

Medicine Name	Dose	Frequency	Why Taking?	Expired?	Need Refill?	Taking as Prescribed?
				Y/N	Y/N	Y/N
				Y/N	Y/N	Y/N
				Y/N	Y/N	Y/N

Over-the-Counter Medicines, Such as Vitamins, Herbal Medicines, and Cold Medicine

Medicine Name	Dose	Frequency	Why Taking?

Checklist for Staff



Checklist: Creating a Medication List

Starting the Process

- ☐ Thank patients for bringing in their medicines.
- ☐ Use the word "medicine" instead of medication.

Creating the Medication List

- ☐ Complete the Medication List form for each prescription medication.
- ☐ Complete the Medication List form for each over-the-counter medication, vitamin, and supplement.

Confirming the Medication List is Complete

- ☐ Is there anything the patient could not bring in?
- ☐ Is there anything the patient was not sure about bringing in?
- ☐ Is there anything the patient forgot?

Finishing

- ☐ Suggest that the patient throw away any expired medications.
- ☐ Tell the clinician about any prescription that is not being taken as prescribed.

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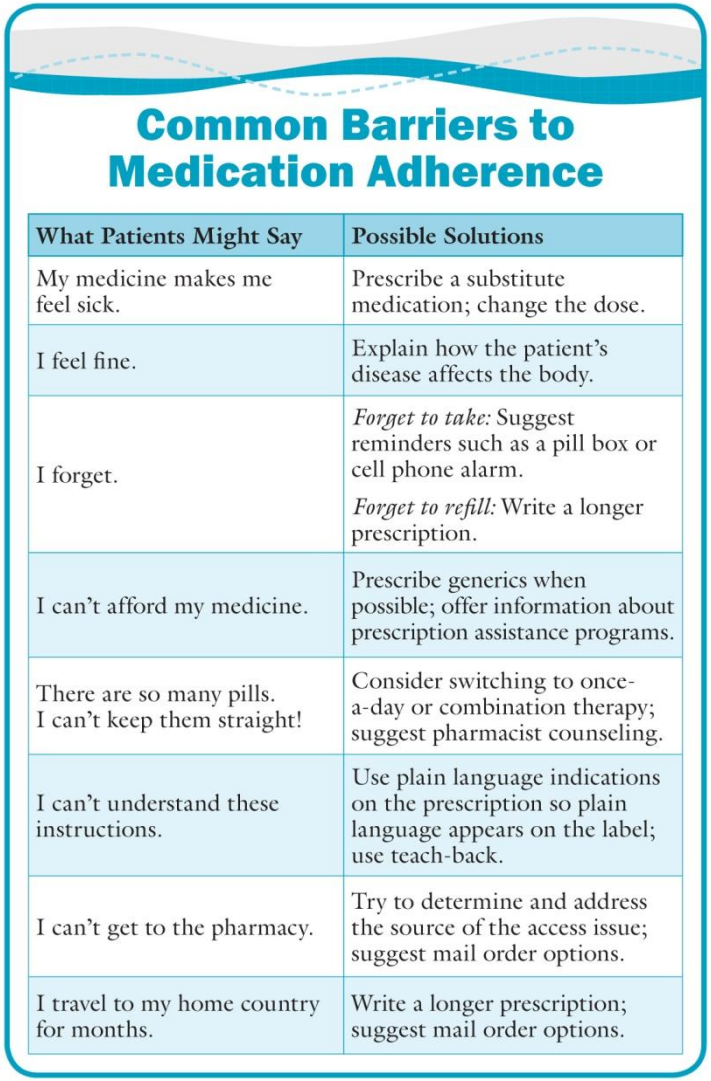
- Checklist to help support adoption
- Supplements procedure guide
- Can be used at the point of care every time staff conduct medicine review

Common Barriers Fact Sheet

- Aids clinicians in discussing barriers & facilitators of medication:
  - Filling
  - Adherence
- Available in
  - Full page
  - Pocket size version



Common Barriers to Medication Adherence

What Patients Might Say	Possible Solutions
My medicine makes me feel sick.	Prescribe a substitute medication; change the dose.
I feel fine.	Explain how the patient's disease affects the body.
I forget.	*Forget to take:* Suggest reminders such as a pill box or cell phone alarm. *Forget to refill:* Write a longer prescription.
I can't afford my medicine.	Prescribe generics when possible; offer information about prescription assistance programs.
There are so many pills. I can't keep them straight!	Consider switching to once-a-day or combination therapy; suggest pharmacist counseling.
I can't understand these instructions.	Use plain language indications on the prescription so plain language appears on the label; use teach-back.
I can't get to the pharmacy.	Try to determine and address the source of the access issue; suggest mail order options.
I travel to my home country for months.	Write a longer prescription; suggest mail order options.

Step 4. Orient Patients

- Orient the patient to the Medication Management Strategy
  - Patient Fact Sheet
- Discuss why it is important
- Reinforce the need for patients to engage in discussions about their medicines

Please Bring ALL Your Medicines to Your Next Appointment

You will work with your health care team to make a medicine list. Please make sure you bring...

- ☐ Prescription medicines.
- ☐ Medicines you buy without a prescription (like Tylenol® or cold medicine).
- ☐ Ointments or creams.
- ☐ Bottles of drops.
- ☐ Inhalers.
- ☐ Injections.
- ☐ Vitamins and herbal medicines.
- ☐ Any questions you have about your medicines.

All your medicinces from all your providers!

Even things you don't take all the time!

Your doctor will go over them with you to...

- Review what you are taking.
- Make sure you are taking your medicines in the best way for you.
- See if you can take fewer medicines.
- Answer your questions.

This is important because it...

- Helps you be an active member of your health care team.
- Gives you a complete medicine list that can be shared with other doctors and hospitals.

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Appointment Reminder Card

Please bring ALL your medicines to your next appointment.

- ☐ Prescription medicines.
- ☐ Medicines you buy without a prescription (like Tylenol® or cold medicine).
- ☐ Ointments or creams.
- ☐ Bottles of drops.
- ☐ Inhalers.
- ☐ Injections.
- ☐ Vitamins and herbal medicines.
- ☐ Any questions you have about your medicines.

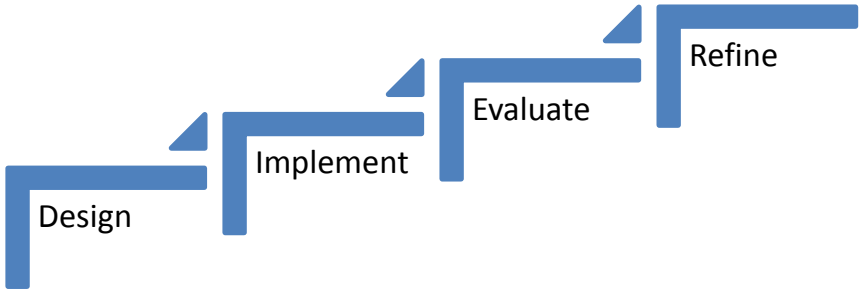
Your next appointment is

Mon. Tue. Wed. Thur. Fri. Sat.

Date:_____

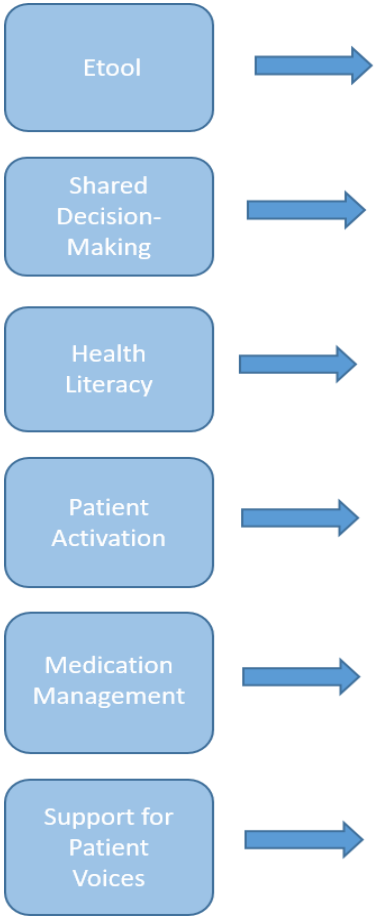
at: _____ AM[ ] PM[ ]

Step 5. Evaluate & Refine



- Observations
- Team debriefs
- Simple counts

How can the AHRQ PFE Guide help practices achieve success?



PTN PFE Performance Dashboard Domains

- Domain 1: Internal PFE Structure
- Domain 2: Spread to Practices
- Domain 3: PFE Success Stories
- Domain 4: Innovation

Practice Assessment Tool PFE Metrics

Metric 4: Practice can demonstrate that it encourages patients and families to collaborate in goal setting, decision making, and self-management.
Metric 5: Practice has a formal approach to obtaining patient and family feedback and incorporating this into the QI system, as well as the strategic and operational decisions made by the practice.

How Can I Get Started?

Step 1. PREPARE
- ☑ Identify practice champion.
- ☑ Assess readiness for change.
- ☑ Secure leadership support.

Step 2. PLAN
- ☑ Review strategies.
- ☑ Design implementation.
- ☑ Engage patients in planning.
- ☑ Select evaluation metrics.

Step 3. EDUCATE
- ☑ Inform every practice team member.
- ☑ Educate and train team members.

Step 4. INFORM
- ☑ Make patients aware.

Step 5. EVALUATE
- ☑ Recognize team's efforts.
- ☑ Monitor impact.

Figure 1. Implementation Process

QUESTIONS?

Other Resources

- **Brown Bag Medication Review: Tool #8 from the Agency for Healthcare Research and Quality's Health Literacy Universal Precautions Toolkit** (http://www.ahrq.gov/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/healthlittoolkit2-tool8.html)
- **Help Patients Remember How and When to Take Their Medicine: Tool #16 from the Agency for Healthcare Research and Quality's Health Literacy Universal Precautions Toolkit** (http://www.ahrq.gov/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/healthlittoolkit2-tool16.html)
- **Brownbag Tool Kit from the Ohio Patient Safety Institute** (http://ohiohospitals.org/Patient-Safety-Quality/Ohio-Patient-Safety-Institute-OPSI/Professional-Resources/Medication-Safety.aspx)

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