



Create a Safe Medicine List Together

AHRQ

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



Agency for Healthcare Research and Quality

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Speaker



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No financial conflicts of interest to
disclose.

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 Create a Safe Medicine List Together strategy in improving patient safety
- Identify strategies for implementing the Create a Safe Medicine List Together strategy in primary care settings

Guide – Project Goals



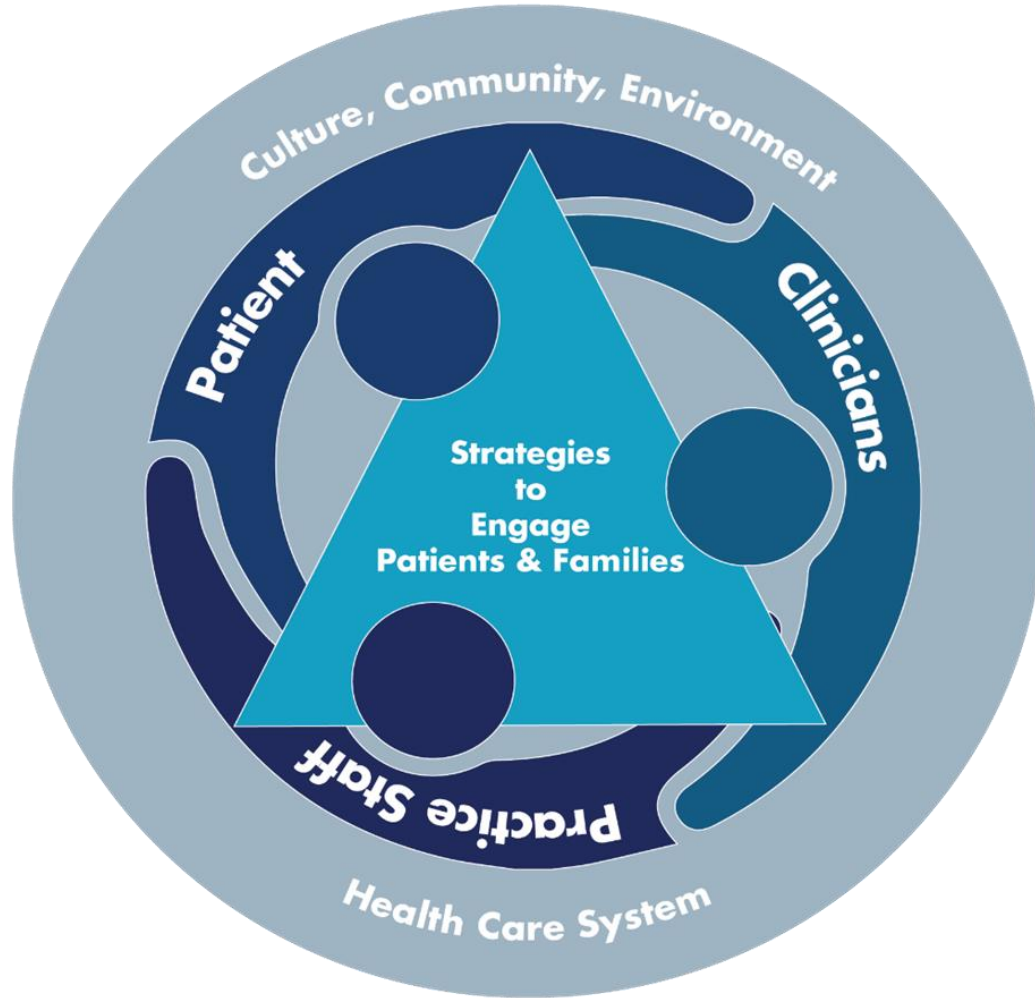
- Meaningful engagement with patients and families in ways that impact safety, not just quality
- Based on evidence
- Tools that are easy to use
- Tools for practices who have not done much in this area

Key Project Deliverables

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



Patient & Family Engagement in Primary Care



Patient Safety in Primary Care

Did you know...Patient safety issues in primary care are real.

Annually,

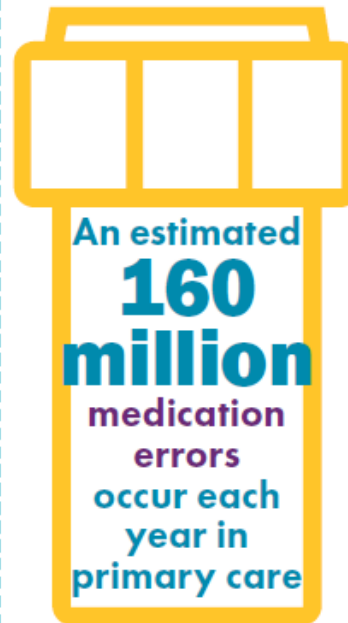
1 in 20



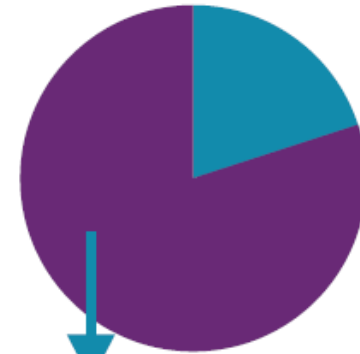
outpatients experiences a **diagnostic error**



55%
of patients said
diagnostic errors
were a chief concern
in outpatient visits



An estimated
160 million
medication
errors
occur each
year in
primary care



80%
of information shared
in a primary care visit is
immediately forgotten
by patients

1 in 9

ED admissions
are related to an
adverse drug event



Four Interventions

- Be Prepared to be Engaged
- **Create a Safe Medicine List Together**
- Teach-Back
- Warm Handoff Plus



Be Prepared To Be Engaged

- Facilitates visit agenda setting for patients and clinicians.
- Improves visit efficiency and safety and promotes effective communication.



Create a Safe Medicine List Together

- Creates a complete and accurate medicine list, which is the first line of defense against medication errors.
- Leads to improved patient outcomes, adherence, and safety.



Teach-Back

- Improves communication and health literacy.
- Ensures the effective transfer of information shared with patients.



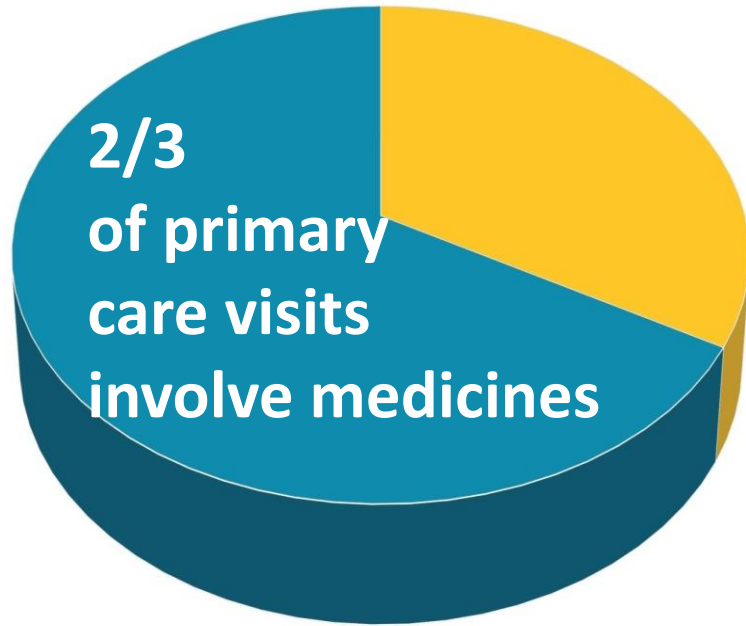
Warm Handoff Plus

- Promotes collaborative communication, engaging the patient as part of the team.
- Supports handoff within the practice to reduce communication drops during transitions.

What is it?



Why is it important?



3.2 billion

ordered or prescribed

160 million

of those result in error

*For patients on **5+ medicines**,*
57% are not needed, are contraindicated, or
are not taken as prescribed

How can it help me?

- Results in a **complete and accurate** medicine list
- Reduces **medicine errors**
- Offers the opportunity to **reduce the number** of prescribed medicines
- Improves the clinician and patient **relationship**

How do I use it?

- Request patients bring in medicines
- Remind patients to bring in medicines
- Create a safe medicine list together
- Document the list in the EHR
- Review and reconcile the list
- Update the EHR

Materials for Patients



Your next appointment is

With: _____

on

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

Date: _____

at: _____AM[] PM[]

Please bring ALL your medicines to your next appointment.

To keep you safe, we need to know about all the medicine you take from all your doctors.

Please make sure you bring (in the original container)...

- 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.



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emergency department admissions are related to an adverse drug event

Your care team will go over them with you and your family to...

- Make sure you are taking your medicines in the best way for you.
- Make sure all your medicines work well together.
- See if you can take fewer medicines.
- Answer your questions.



Tools for Practice Staff



Checklist: Creating a Medicine List

When patient brings medicines

Starting the Process

- Thank the patient for bringing in his or her medicines
- Use the word "medicine" instead of medication

Creating the Medicine List with the Medicines

- One by one, compare each medicine
- Discuss each medicine with the patient

Checking the Medicine List in the EHR

- For each medicine listed in the EHR, ask if the patient is still taking it
- For each medicine the patient is still taking, ask the patient how he or she takes the medicine

Completing the Medicine List

- Ask if there are any more medicines to bring in
- If there are additional medicines, ask the patient how he or she takes the medicines
- Update the EHR as necessary

Finishing the Process

- Check whether any refills are needed
- Tell the clinician of any medicines not in the EHR



Checklist: Creating a Medicine List

When patient does NOT bring medicines

Starting the Process

- Use the word "medicine" instead of medication

Checking the Medicine List in the EHR

- For each medicine listed in the EHR, ask if the patient is still taking it
- For each medicine the patient is still taking, discuss the medicine with the patient; ask the patient how he or she takes the medicine

Completing the Medicine List

- Ask if there are any more medicines that the patient takes
- If there are additional medicines, ask the patient how he or she takes the medicines
- Update the EHR as necessary

Finishing the Process

- Check whether any refills are needed
- Tell the clinician of any medicines that are not being taken as listed in the EHR



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

Procedure to Create a Medicine List



Introduction

The strategy to **Create a Safe Medicine List Together** engages patients and families to actively participate with you in developing a complete and accurate medicine list.

- **Patients** – bring in all the medicines they take, both prescribed and over-the-counter. This includes non-oral medicines such as injections, inhalers, ointments, and drops, as well as medicines they only take occasionally.
- **Practice staff** – work with patients and their families to develop a complete and accurate medicine list.
- **Clinicians** – conduct reconciliation based on the complete and accurate medicine list.

Step 1. Before the appointment (Staff)

1. Remind patients to bring all their medicines to their next appointment. You can use a telephone, email, or text reminder, as well as the Patient Information Card provided with this strategy.
2. If you use the Patient Information Card, you can mail the card to patients before their appointment as a reminder. The Patient Information Card also includes an appointment reminder (date/time) on the back. Alternatively, you can give the Patient Information Card to patients as they leave their current appointment, to remind them of their next appointment and to bring their medicines with them next time.
3. Consider providing a bag to patients to encourage and facilitate bringing in medicines. If patients are reluctant to bring in their medicines, offer them the option of bringing in photographs of their medicine labels.
4. For medicines that need to be refrigerated, suggest that the patient bring the medicine in a thermal tote or bring a photograph of the medicine label.

Step 2. At Patient Rooming (Staff with Patient)

If the patient brought in medicines, follow the procedure below.

If the patient did NOT bring in medicines, follow procedure beginning on page 3.



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

Tools for Training



Create a Safe Medicine List Together

Scripts

Request patients bring in all of their medicines

[Clinician] wants you to bring all of your medicines to your next appointment, so we can make sure we have a complete medicine list for you. We need to know about all the medicines you take from all of your doctors, so we want you to bring in everything you take – all your prescriptions and over-the-counter medicines, including pills and liquids, and also drops, creams, inhalers, injections, vitamins, and supplements. Bring them in their original container. [Optional: Here's a bag you can use to bring them in.] We want to make sure you are taking your medicines in the best way for you and that all your medicines work well together.

Remind patients to bring in all of their medicines

Can be used in person or in an automated reminder

Please remember to bring in all of your medicines to your appointment with [clinician] on [date] at [time]. Bring all your medicines from all your doctors, and bring them in their original container. Be sure to bring your prescriptions and your vitamins and over-the-counter medicines too. This includes drops, creams, inhalers, and injections.

Respond to patients who are reluctant to bring in all their medicines

If a patient says	Respond
My doctor already knows what I take.	We also need to know what other doctors have prescribed and what non-prescription medicines you're taking, like vitamins and supplements.
The computer keeps track of all of my medicines.	The computer doesn't always have the medicines that your other doctors prescribed, and we don't always know the vitamins, supplements or even over-the-counter medicines you are taking.
I'm at work all day and don't want to carry my medicines with me or leave them in the car.	You could take pictures of each of your medicines and just bring in your phone. Make sure to include the label because it has important information.
Some of medicines need to be refrigerated.	You could bring that medicine in a thermal bag, like a lunch box. Or you could take a picture of the medicine. Make sure to include the label because it has important information.



Create a Safe Medicine List Together

Role Play Scenario 1

Facilitator Instructions

- Create props (index cards or post-it notes) to represent the medicine labels.
 - Hydrochlorothiazide 50 mg – 1 tablet PO QD
 - Atorvastatin 20 mg – 1 tablet PO QD (evening)
 - Adult aspirin 81 mg
- As facilitator, play the role of the patient.
- Request a volunteer to play the role of the staff member. The staff member will create a safe medicine list together with the patient.
- Tell the volunteer that the goal is to have the volunteer write down the medicines the patient is currently taking.
- Provide the volunteer and the trainee. The trainee contains the basic patient information.
- Read silently the additional patient information during the role play.
- Role play the scenario with the volunteer.
- Using the discussion prompts (page 10) discuss on what went well and what could be improved.



Overcoming Barriers to Medicine Adherence

What Patients Might Say	Possible Solutions
My medicine makes me feel sick.	Prescribe a substitute medication; change the dose.
I feel fine. I don't need any medicine.	Explain in plain language how the medicine affects the body and use teach-back to ensure understanding.
I forget.	<i>Forget to take:</i> Suggest reminders such as a pill box or cell phone alarm; ask if there is someone else in the home who can remind them. <i>Forget to refill:</i> Write prescriptions for a longer length of time; synchronize refills so that refills are needed less frequently.
I can't afford my medicine.	Prescribe generics when possible; offer information about prescription assistance programs; prescribe medicines covered by patient's insurance.
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 instructions on the prescription so plain language appears on the label; use teach-back or the Show Me method.
I can't get to the pharmacy.	Try to determine and address the source of the access issue; suggest mail order options.
I travel for months at a time.	Write prescriptions for a longer length of time; suggest mail order options.



When should I use it?

- All patients
- All patients once a year
- Specific patient populations
 - Recently in the hospital or ER
 - Take 5 or more medicines
 - Have a chronic condition



Scenario 1

- Mr. Thomas – 78-year-old male with uncontrolled hypertension and knee pain
- Lifts weights, walks often, rides stationary bike
- Visiting for knee pain that is keeping him from exercising
- EHR lists:
 - Hydrochlorothiazide 50 mg – 1 tablet PO QD.
 - Atorvastatin 20 mg – 1 tablet PO QD.
 - Low-dose adult aspirin 81 mg – 1 tablet PO QD.



Getting Started with Create a Safe Medicine List Together

Implementation Quick Start Guide

Create a Safe Medicine List Together



1 Review intervention and training materials

- Understand the purpose, use, and benefits of Create a Safe Medicine List Together.
- Review the training toolkit.

2 Make decisions for your implementation

Obtain materials

- Will you print materials in the office or order printing?
- Who will be responsible for maintaining a supply?
- Do you need Spanish versions of the patient materials?

Set scope

- Which patients will you ask to bring in medicines? All patients? Patients with more than 5 medicines? Patients who were recently in the hospital or emergency room?
- How often will you ask patients to bring in medicines? Annually? When they've had a medicine change? When they've sought other care (specialist, hospital)?

Encourage bringing in medicines

- How will you ask patients to bring in their medicines?
- Will you give patients the reminder card? Will you hand it out? Mail it?
- Will you give patients a bag to bring in their medicines?
- Will you use a reminder call or text to remind patients to bring in their medicines?
- Will you put up posters? If yes, where?

Establish workflow

- Who will work with the patient to create the medicine list? The medical assistant? Nurse? Clinician? Pharmacist?
- How will the medicine list and any identified issues be handed off to the clinician?
- Who will document the updated medicine list in the EHR?
- Will you use the checklist?

Identify champions

- Who will champion the strategy within each role on the team?

3 Customize training for your practice

- Customize the training materials to reflect your decisions.
- Select and/or customize role play scenarios.



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

Step 1

- Identify a Champion and Get Leadership Buy-in

Step 2

- Plan Your Implementation Process

Step 3

- Design Your Implementation

Step 4

- Make Patients Aware

Step 5

- Evaluate Effectiveness

Step 1. Identify a Champion and Get Leadership Buy-in



- Identify a practice champion for the Create a Safe Medicine List Together strategy
- Consider engaging a patient champion
- Obtain leadership buy-in and support

Step 2. Plan Your Implementation Process


- Identify your team
- Set a reasonable timeline
- Determine a standardized implementation process




Step 3. Design Your Implementation

Implementation Quick Start Guide

Create a Safe Medicine List Together



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- Use the Implementation Quick Start Guide
- Make implementation decisions
- Train team members

Step 4. Make Patients Aware

- Orient the patient to the strategy
 - Patient poster
 - Patient reminder cards
- Discuss expectations for use
- Reinforce behaviors at every level of the encounter

The image displays two versions of a patient education poster. The top poster features a blue header with a pill icon and the title "Please Bring ALL Your Medicines to Your Next Appointment". Below the title, it states: "To keep you safe, we need to know about all the medicine you take from all your doctors." and "Please make sure you bring (in the original container)...". A checklist includes: Prescription medicines, Medicines you buy without a prescription (like Tylenol® or cold medicine), Ointments or creams, Bottles of drops, Inhalers, Injections, and Vitamins and herbal medicines. An illustration of various medicine bottles and boxes is shown. The bottom poster is a reminder card with a blue van icon and the text "1 in 9 emergency department admissions is related to an adverse drug event." It includes the same title and message as the top poster, along with the same checklist and medicine illustration.

Please Bring ALL Your Medicines to Your Next Appointment

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- Inhalers.
- Injections.
- Vitamins and herbal medicines.

Step 5. Evaluate Effectiveness

- Recognize your team's efforts and successes
- Establish evaluation measures
- Monitor the impact on patient safety and patient engagement activities

How will we evaluate it?

- Adverse drug events
- Unsafe medicine issues
- Medicine adherence
- Satisfaction
- Reported use
 - How many bring in medicines
 - How many create safe medicine list together

Get Started Today!

- Visit the AHRQ Website
- <http://bit.ly/PrimaryCareGuide>



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Warm Handoff Plus

- Promotes collaborative communication, engaging the patient as part of the team.
- Supports handoff within the practice to reduce communication drops during transitions.

QUESTIONS?



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