



Medication Reconciliation in the Ambulatory Setting

Every year, an estimated 2.8 billion medications are ordered or provided during a physician office visit and another 329 million medications are involved in outpatient visits (Centers for Disease Control and Prevention, 2017). With this many medications being distributed to patients, it is vital that you follow appropriate medication reconciliation practices every time a patient enters or leaves your office. Medication errors are one of the most common patient safety errors, so we need to take every step we can to alleviate these types of errors and protect our patients from harm. A strong medication reconciliation process will not only improve patient safety, but it will promote patient education, patient empowerment and a patient's involvement along the healthcare continuum.

In this issue of the *RQS Insider*, we explore the medication reconciliation process in ambulatory settings and offer some tips on how to conduct and develop a thorough medication reconciliation process.

Conducting a Medication Reconciliation

Step 1 - Obtain

- Distribute the medication form prior to the office visit, so the patient can fill it out ahead of time.
- Instruct the patient to include over-the-counter medications, vitamins and dietary supplements on the form.

Step 2 - Verify

- At the beginning of the appointment, review the medication list with the patient and/or his/her caregiver.
- Although you may normally ask close-ended questions, try to ask open-ended questions as well in order to obtain more information from your patient and to engage him/her in the process. For example, ask, "What do you take for managing your cholesterol?" Because a patient often forgets to mention creams, ointments, lotions, patches, eye drops and ear drops, also ask him/her about routes of administration other than oral medicines.
- Ask the patient what medications he/she takes for his/her medical conditions.
- Ask the patient who prescribes medications for him/her.
- Ask the patient when he/she takes his/her medications. Make sure to inquire about medications with infrequent dosing regimens, which the patient may be more likely to forget.
- Ask the patient if there were any recent changes to his/her medication regimen.
- Request outpatient pharmacy records to serve as a double check when confirming medications dose and refill history.

Step 3 - Document

- Document the patient's medications in the medical record and record any new prescriptions.

Step 4 - Reconcile

- Review the patient's medication list and evaluate the medications to identify any discrepancies or errors.
- Report any discrepancies to a physician and appropriately resolve any issues.
- Document all medication changes and update the patient's medication list.

Developing a Medication Reconciliation Process

To ensure the consistency, efficiency and effectiveness of your facility's medication reconciliations, it is important to have a formal process in place. The following recommendations support the steps outlined above and will help you create a strong medication reconciliation process.

- Adopt the use of a single standardized list or form for obtaining patient medication information, such as the one created by the [Institute for Safe Medication Practices and Patient Safety Authority](#).
- Consider developing scripted messages for the electronic medical record to remind staff to complete necessary reconciliation steps and to be thorough in their processes.
- Develop a checklist for verifying patient medication information to ensure that patient interviews are consistent and thorough.
- Define roles and assign them to staff so that responsibilities and tasks in the medication reconciliation process are clearly defined and not missed.
- Standardize and simplify the medication reconciliation process throughout the practice to eliminate redundancies.
- Develop tailored alerts to educate staff on what information needs to be documented and regularly remind them it is important to be comprehensive and accurate in documenting medication information.
- Educate patients and their families on the importance of medication management.
- Ensure the medication reconciliation process is compliant with all local laws and regulations.

The following are additional things to consider when developing and conducting your medication reconciliation process.

Questions	Yes/No/NA	Comments
1. Do you have an implementation strategy for the adoption of a medication reconciliation process?		
2. As part of your implementation and orientation strategies, has an educational training program been implemented to provide staff with the appropriate steps to ensure compliance?		
3. Have you created an audit system to document and evaluate errors and review charts on a monthly basis to ensure that medication reconciliations are performed?		
4. Have you developed a process to assess the practice's performance and to evaluate your guidelines and processes on a continuous basis to make sure they are serving your practice's needs while providing the best medication reconciliation measures possible?		
5. Do you have a formal process for assessing medication adherence and identifying patients at risk for non-adherence?		
6. As part of the medication reconciliation process, has your practice considered obtaining outpatient pharmacy records to confirm medication dose and refill history?		
7. Are there protocols in place to identify patients who are cognitively impaired? Has your practice provided education on how to conduct medication reconciliations with patients who are cognitively impaired?		
8. Do you have tools available to assess your patients' health literacy levels? If the patient exhibits signs of limited health literacy, has your practice been educated on alternative techniques of teaching patients about their medications?		
9. Do you have protocols to identify high-risk patients for increased chance of medication errors such as identifying when polypharmacy is present in one of your patients?		
10. Do you regularly educate patients on the importance of maintaining an accurate medication list? On possible food and nutrient interactions?		