Fundamental Skills for Patient Care in Pharmacy Practice

Colleen D. Lauster, PharmD, BCPS, CDE
Clinical Pharmacy Specialist, Ambulatory Care
Beaumont Hospital, Royal Oak
Royal Oak, MI

Sneha Baxi Srivastava, PharmD, BCACP
Clinical Assistant Professor
Chicago State University College of Pharmacy
Chicago, IL
# CONTENTS

<table>
<thead>
<tr>
<th>Preface</th>
<th>ix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributors</td>
<td>xi</td>
</tr>
<tr>
<td>Reviewers</td>
<td>xiii</td>
</tr>
</tbody>
</table>

## CHAPTER 1  The Patient Interview

<table>
<thead>
<tr>
<th>Learning Objectives</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Terms</td>
<td>1</td>
</tr>
<tr>
<td>Introduction</td>
<td>1</td>
</tr>
<tr>
<td>Communication Skills</td>
<td>2</td>
</tr>
<tr>
<td>The Patient Interview</td>
<td>8</td>
</tr>
<tr>
<td>Medication History</td>
<td>20</td>
</tr>
<tr>
<td>The Patient Interview in the Community Setting</td>
<td>28</td>
</tr>
<tr>
<td>The Patient Interview in the Acute Care Setting</td>
<td>32</td>
</tr>
<tr>
<td>Chapter Summary</td>
<td>34</td>
</tr>
<tr>
<td>Review Questions</td>
<td>35</td>
</tr>
<tr>
<td>References</td>
<td>35</td>
</tr>
</tbody>
</table>

## CHAPTER 2  The Medical Record

<table>
<thead>
<tr>
<th>Learning Objectives</th>
<th>37</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Terms</td>
<td>37</td>
</tr>
<tr>
<td>Introduction</td>
<td>37</td>
</tr>
<tr>
<td>Importance of Proficiency in Navigating the Patient's Medical Record</td>
<td>38</td>
</tr>
<tr>
<td>Components of a Patient's Medical Record</td>
<td>38</td>
</tr>
<tr>
<td>Systematic Approach to Data Collection</td>
<td>49</td>
</tr>
<tr>
<td>Pharmacy-Related Components of the Patient Medical Record</td>
<td>52</td>
</tr>
<tr>
<td>Navigating Choppy Waters: What to Do if Information is Missing and/or Misplaced</td>
<td>54</td>
</tr>
<tr>
<td>Synthesizing Patient Information: Developing a Problem List</td>
<td>56</td>
</tr>
<tr>
<td>Case Study</td>
<td>60</td>
</tr>
</tbody>
</table>
## Contents

Chapter Summary  
Review Questions  
References  

### CHAPTER 3  Written Communication  
65

Learning Objectives  
Key Terms  
Introduction  
Types of Written Documentation  
The SOAP Note  
Other Types of Pharmacy-Written Documentation  
Effective Written Communication  
Chapter Summary  
Review Questions  
References  

### CHAPTER 4  The Patient Presentation  
97

Learning Objectives  
Key Terms  
Introduction  
Verbal and Nonverbal Communication Skills  
Structure of a Patient Presentation  
Gathering Information  
Different Types of Patient Presentations  
Other Types of Patient Presentations  
Formal Versus Informal Presentations  
Slides and Handouts  
The Audience  
Practicing Your Presentation  
Putting it All Together: Presenting the Patient Case  
Chapter Summary  
Review Questions  
References  

### Appendix 4.A  
Sample Case Presentation Evaluation  

### Appendix 4.B  
Sample Case Presentation Evaluation  

### CHAPTER 5  Patient Counseling: Patient Factors  
125

Learning Objectives  
Key Terms  

## Contents

### CHAPTER 8  Patient Counseling: Motivational Interviewing and Health Behavior Change 197

- Learning Objectives 197
- Key Terms 197
- Introduction 197
- The Significance of Motivational Interviewing 198
- Motivational Interviewing as an Approach 199
- Motivational Interviewing from a Theoretical Standpoint 201
- MI Principles, Microskills, and Strategies and the “Spirit of MI” 205
- Use of MI in Patient Interactions for Facilitating Behavior Change 213
- MI and the Helping Relationship 215
- Implications for Practice 218
- Chapter Summary 218
- Review Questions 219
- References 220

### CHAPTER 9  Medication Reconciliation 223

- Learning Objectives 223
- Key Terms 223
- Introduction 223
- Impact of Medication Reconciliation on Patient Safety 224
- Medication Errors 224
- Medication Reconciliation in the Inpatient Acute Care Setting 225
- Medication Reconciliation in the Ambulatory Care Setting 229
- Differences in Medication Reconciliation Between Inpatient Acute Care and Ambulatory Care Settings 230
- Implementing Medication Reconciliation 231
- Identifying Medication Discrepancies 232
- Resolving Medication Discrepancies 237
- Strategies to Improve Medication Reconciliation 239
- Patient Case 239
- Medication Reconciliation and Barriers of System-Wide Changes 241
- Chapter Summary 242
### CHAPTER 10  
**Presentations and Interprofessional Communication**  
263

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Objectives</td>
<td>263</td>
</tr>
<tr>
<td>Key Terms</td>
<td>263</td>
</tr>
<tr>
<td>Introduction</td>
<td>263</td>
</tr>
<tr>
<td>Topic Discussions</td>
<td>264</td>
</tr>
<tr>
<td>Journal Clubs</td>
<td>267</td>
</tr>
<tr>
<td>Grand Rounds Presentations</td>
<td>275</td>
</tr>
<tr>
<td>Pharmacy Inservices</td>
<td>280</td>
</tr>
<tr>
<td>Interprofessional Communication</td>
<td>281</td>
</tr>
<tr>
<td>Chapter Summary</td>
<td>289</td>
</tr>
<tr>
<td>Review Questions</td>
<td>290</td>
</tr>
<tr>
<td>References</td>
<td>291</td>
</tr>
</tbody>
</table>

### CHAPTER 11  
**Medication Therapy Management**  
293

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Objectives</td>
<td>293</td>
</tr>
<tr>
<td>Key Terms</td>
<td>293</td>
</tr>
<tr>
<td>Introduction</td>
<td>293</td>
</tr>
<tr>
<td>Practice Setting and Location</td>
<td>294</td>
</tr>
<tr>
<td>Appropriate Patients for MTM</td>
<td>295</td>
</tr>
<tr>
<td>Patient Visits</td>
<td>296</td>
</tr>
<tr>
<td>Core Elements of MTM</td>
<td>296</td>
</tr>
<tr>
<td>Billing</td>
<td>302</td>
</tr>
<tr>
<td>Benefits of MTM</td>
<td>303</td>
</tr>
<tr>
<td>Challenges to MTM</td>
<td>304</td>
</tr>
<tr>
<td>Chapter Summary</td>
<td>305</td>
</tr>
<tr>
<td>Review Questions</td>
<td>306</td>
</tr>
<tr>
<td>References</td>
<td>306</td>
</tr>
</tbody>
</table>
Contents

Appendix 11.A  Stepwise Approach of Medication Therapy Management  308
Appendix 11.B  Sample Personal Medication Record  309
Appendix 11.C  Sample Medication-Related Action Plan (for the Patient)  311
Appendix 11.D  Example Prescription Profile  313

Answers to Chapter Review Questions  317
Glossary  327
Index  333
We are so excited about the publication of this textbook and to share it with you! As teachers and clinicians, we feel there is not an all-encompassing textbook to match the needs of a practical course in which students learn about patient interviewing, patient counseling, medication histories, journal clubs, and case presentations. We recall that when we were students and residents there was not a guide or reference to lead us in the right direction when we were asked, for example, to write a SOAP note or “work-up” a patient. And now, as teachers, we struggle with the lack of literature and references to support the development of lectures on these practical topics. Most of the available literature and resources for patient interviewing, journal clubs, and case presentations are designed for medical students and medical residents, not for pharmacists. For all of these reasons (and more!), we decided to publish *Fundamental Skills for Patient Care in Pharmacy Practice*, which we feel services unmet needs in pharmacy education.

This textbook provides practical information for a student pharmacist, resident pharmacist, or new practitioner. Each chapter focuses on the various skills of a clinical pharmacist, such as communication, patient counseling, patient interviewing, documentation, medication reconciliation, medication therapy management, and presentation skills. The information is presented and designed in a simple and direct way so that readers can learn the various components, definition, importance, and application of a skill. We have included numerous examples, sample cases, and how-tos to help further the reader's understanding of each skill. The text also includes take-home points and review questions at the end of each chapter to help the readers solidify their knowledge of the material.

We each give a special thank you to our husbands and families—writing a textbook is time consuming, and we appreciate their support and patience. We thank each contributing author for offering his or her expertise, experiences, and time. This textbook is complete because of their dedication to the profession and education. We thank our teachers and mentors who inspired us to be lifelong learners and educators. Additionally, we acknowledge Chicago State University College of Pharmacy for inspiring us to pursue a textbook that can supplement pharmacy education. Lastly, and to whom we dedicate this textbook, we thank our students for continuously challenging us to be the best teachers and practitioners we can be.

—Colleen and Sneha
CONTRIBUTORS

Sheila M. Allen, PharmD, BCPS
Clinical Assistant Professor, Department of Pharmacy Practice
University of Illinois College of Pharmacy
Chicago, Illinois

Devra Dang, PharmD, BCPS, CDE
Associate Clinical Professor of Pharmacy Practice
University of Connecticut School of Pharmacy
Storrs, Connecticut

Kristen L. Goliak, PharmD
Clinical Assistant Professor, Department of Pharmacy Practice
University of Illinois College of Pharmacy
Chicago, Illinois

Lisa M. Holle, PharmD, BCOP
Assistant Clinical Professor of Pharmacy Practice
University of Connecticut School of Pharmacy
Storrs, Connecticut

Diana Isaacs, PharmD, BCPS
Assistant Professor of Pharmacy Practice
Chicago State University College of Pharmacy
Chicago, Illinois

Sonali G. Kshatriya, PharmD
Residency Program Director
Dominick’s Pharmacy
Oakbrook, Illinois

Rupal Patel Mansukhani
Clinical Assistant Professor, Department of Pharmacy Practice and Administration
Rutgers Ernest Mario School of Pharmacy
Piscataway, New Jersey
Contributors

Kimberly A. Pesaturo, PharmD, BCPS
Assistant Professor of Pharmacy Practice
Massachusetts College of Pharmacy and Health Sciences
Worcester, Massachusetts

Elena Petrova
Specialist in Clinical Pharmacy
Counseling Center, Student Success Center
University of Wisconsin Oshkosh
Oshkosh, Wisconsin

Tatjana Petrova, PhD
Assistant Professor of Pharmacy Practice
Chicago State University College of Pharmacy
Chicago, Illinois

Marissa C. Salvo, PharmD
Assistant Clinical Professor of Pharmacy Practice
University of Connecticut School of Pharmacy
Storrs, Connecticut

Elizabeth Seybold, PharmD
Patient Care Services Manager
Safeway Pharmacy, Dominick’s Division
Oak Brook, Illinois

Linda M. Spooner, PharmD, BCPS
Associate Professor of Pharmacy Practice
Massachusetts College of Pharmacy and Health Sciences
Worcester, Massachusetts

Karen Steinmetz Pater, PharmD, BCPS, CDE
Assistant Professor of Pharmacy and Therapeutics
University of Pittsburgh School of Pharmacy
Pittsburgh, Pennsylvania
Dean L. Arneson, PharmD, PhD  
Academic Dean, Concordia University Wisconsin School of Pharmacy  
Mequon, Wisconsin

J. Nile Barnes, EMT-P (LP), PharmD, BCPS  
Clinical Assistant Professor  
The University of Texas at Austin  
Austin, Texas

Gayle A. Brazeua, PhD  
Dean and Professor, College of Pharmacy  
University of New England  
Portland, Maine

Rebecca K. Cantrell, PharmD, RPh, CFTS  
Assistant Professor of Pharmacy Practice  
Appalachian College of Pharmacy  
Oakwood, Virginia

Emily K. Flores, PharmD, BCPS  
Assistant Professor of Pharmacy Practice, Bill Gatton College of Pharmacy  
East Tennessee State University  
Johnson City, Tennessee

Jason Glowczewski, PharmD, MBA  
Manager, Pharmacy and Oncology, UH Geauga Medical Center  
Affiliate Assistant Professor of Pharmacy Practice, University of Findlay  
Findlay, Ohio

Yolanda M. Hardy, PharmD  
Associate Professor, Department of Pharmacy Practice  
Chicago State University College of Pharmacy  
Chicago, Illinois
Reviewers

Leah K. Hollon, MPH, ND
Assistant Professor, Pharmacy Practice
Appalachian College of Pharmacy
Oakwood, Virginia

Timothy Howard, PharmD
Assistant Professor, Director of IPPEs
Harding University College of Pharmacy
Searcy, Arkansas

Tommy Johnson, PharmD, CDE, BC-ADM, FAADE
Chair, Professor of Pharmacy Practice
Presbyterian College School of Pharmacy
Clinton, South Carolina

Mary S. Klein, PharmD, BCACP
Assistant Professor of Pharmacy Practice
Health Sciences Center School of Pharmacy
Texas Tech University
Abilene, Texas

Charles D. Ponte, BSc, PharmD, DPNAP, FAPhA, FASHP, FCCP
Professor of Clinical Pharmacy and Family Medicine
Schools of Pharmacy and Medicine
Robert C. Byrd Health Sciences Center
West Virginia University
Morgantown, West Virginia

Kayce M. Shealy, PharmD, BCPS
Assistant Professor, Presbyterian College School of Pharmacy
Clinton, South Carolina

Andrew A. Webster, PhD
Professor and Chair, Department of Pharmaceutical, Social, and Administrative Sciences
Belmont University College of Pharmacy
Nashville, Tennessee

Antonia Zapantis, MS, PharmD, BCPS
Associate Professor
Nova Southeastern University College of Pharmacy
Fort Lauderdale, Florida