ADOPTtoolkit
Accelerating Diffusion of Proven Technologies

Center for Technology and Aging

Clinical Processes:

A Guide from the Medication Optimization Technology Toolkit

Description

In order to standardize the delivery of care, guidelines or protocols outlining key clinician care processes for medication optimization (MedOp) technologies should be developed. Key clinical care processes that should be addressed are patient assessment and enrollment, provision of patient education, and reviewing and responding to MedOp technology data (e.g., medication adherence rate data). Please note that protocols and guidelines are not a substitute for clinician judgment, but rather augment the care process.

Audience

For use in establishing protocols and guidelines for MedOp technology clinical processes involving program staff and clinicians.

Helpful Tips

- This guide is most relevant to MedOp technologies that directly influence patient behaviors and knowledge and communicate with the clinical team, e.g., automated medication dispensers that track medication compliance and alert clinicians and informal caregivers when medications are not taken as scheduled.

1 Clinical Considerations for Patient Assessment and Enrollment

How do staff members and/or clinicians determine and confirm patient eligibility, selection and home assessment?

2 Defining a MedOp Technology Patient Care Plan

Who will contribute to the creation of the MedOp technology Patient Care Plan? What assessment questions and baseline parameters should be used?

3 Providing Patient Education

Who will conduct patient education and at what time during the course of the intervention? What are the key areas of knowledge to address?

4 Reviewing and Responding to MedOp Technology Data

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1 Clinical Considerations for Patient Assessment and Enrollment

A core component of the MedOp technology clinical process is how staff members and/or clinicians determine and confirm patient eligibility and selection. Patient eligibility and selection can be achieved through the use a selection algorithm, pharmacy data, physician referral, patient chart review, home assessment, patient interview, or combination of the above. For more information on patient selection criteria and enrollment, go to the Patient Management Workstream of the Toolkit .

A home and environmental assessment for patients can be conducted by a staff member or clinician to determine appropriate living arrangements, social support, and connectivity for the MedOp technology program. Assessment results are an important means of identifying contraindications for program enrollment. For more information on home and environmental assessments, go to the Technology Management Workstream of the Toolkit.

2 Defining a MedOp Technology Patient Care Plan

Clinicians, such as the patient's primary care physician, specialist, and/or monitoring nurse, as well as the technology vendor, can provide input into developing the MedOp technology patient care plan.

Identify the clinical care focus for the patient, taking into account their conditions, co-morbidities, and risk of suboptimal medication use.

Establish baseline parameters, specific to each patient. Given the desired medication use parameters to be monitored, create a range of data or responses that will guide alert generation when medication use behaviors or data are out of range. Baseline parameters can be determined by a combination of established clinical guidelines, pharmaceutical dosing, indications and contraindications, clinician dictation, and vendor suggestion.

3 Providing Patient Education

Patient education involves introduction to the MedOp technology program and the use of the technology. Identify when and where staff or clinicians conduct patient education.

Staff members/clinicians can introduce the MedOp program and the technology using multiple forms of communication as well as in various settings. For example, patients can be introduced to the program while in the hospital, upon discharge, or via the patient's primary care physician or specialist at a medical appointment. Detailed information can be provided in these settings through brochures, presentations, demonstrations, and recruitment letters.

Patients benefit from learning how the MedOp technology operates within the setting it will be used. Minimize the time between the initial program introduction, enrollment into the program, and technology training to facilitate patient engagement in the program.

When discussing the program with the patient, include information on device and storage, frequency of use, and who to contact for additional support during working, weekend and nighttime hours.

4 Reviewing and Responding to MedOp Technology Data

Organizations should consider whether monitoring of patient data will be conducted in house, through the MedOp technology vendor, or through a combination of these methods.

Parameters for identifying patient readings or trends that fall outside of normal parameters need to be set by the clinical team. A monitoring dashboard should highlight patients that require the most attention and are at the highest risk of suboptimal medication use, by color coding the readings, moving patients to the top of the list, or other indicator system.

Establish how patient data and trends will be presented to nurses, primary care physicians and/or specialists. Actionable, meaningful reports foster greater efficiency and provider engagement.

Establish appropriate protocols and procedures for staff when patient data is outside of the normal range. Determine the accuracy of the data collected by verifying readings and responses, comparing data from previous days, and calling the patient, if necessary.