

Patient Counseling Protocols

COUNSELING PATIENTS includes providing vital information, advice, and assistance to ensure that patients take medications properly. This can also include information about the patient's lifestyle and illnesses. All of this information results in the proper use of medications as well as over the counter products. An offer to provide counseling must be made every time a patient has a prescription filled or refilled. Technicians can inform the patient of the availability of counseling. If a patient accepts the offer to provide counseling a pharmacist must provide the counseling.



Objective:



Describe common patient counseling protocols and situations in which a pharmacist would be called.

Key Terms:



adverse effects

analgesic

contraindications

drug utilization review
(DUR)

empathy

generic

institutional pharmacy

Medicaid

Omnibus Budget

Reconciliation Act of
1990 (OBRA)

Over the Counter (OTC)

Counseling Patients at the Pharmacy

COMMON PATIENT COUNSELING PROTOCOLS

Patient counseling refers to the process of providing vital information, advice, and assistance to ensure that medications are taken properly. Counseling patients at the pharmacy counter is

an acquired skill. Filling prescriptions quickly and accurately is important, however, making sure that the patient understands the therapy is just as critical. When patients pick up their medications without any discussions with the pharmacy staff, they have nothing more than the directions on the label and the medication pamphlet that may or may not make it into the patient's prescription bag.

Pharmacy technicians are not licensed to advise customers with regard to medications and their uses. Technicians can instruct patients according to the clearly printed directions on the bottle of medication. While they are instructing the patient they need to make it clear that they are referring to the directions printed by the manufacturer and that individual use may vary according to a doctor's instructions. Pharmacy technicians are allowed to answer simple questions like whether or not a medication needs to be taken with food, at bed time or in the morning, with plenty of water, or to swallow whole or chew the tablet. Pharmacy technicians can ask the patient if they would like counseling but cannot perform the counseling. The patient must be referred to the pharmacist.

For **Over the Counter (OTC)**, available without a prescription, medications pharmacy technicians can instruct patients according to the clearly printed directions on the bottle. Technicians may answer questions such as "what is an **analgesic**," acting to relieve pain, along with suggestions for available alternative brands. Pharmacy technicians can give instructions to a person about how to operate a medical device, but not an explanation involving the interpretation of the results or the value of the device.



FIGURE 1. Even though you do not need a prescription to purchase over the counter medications, you should still consult with your pharmacist for instructions on the proper use of the product.

The following information can be given to the patient by the pharmacy technician as it is not considered to be counseling:

- ◆ Name of medication
- ◆ Dosage form
- ◆ Dosage
- ◆ Route of administration

While most federal laws provide the pharmacy with guidance on handling medications, the **Omnibus Budget Reconciliation Act of 1990 (OBRA)** placed expectations on the pharmacist on how to interact with the patient. OBRA 1990 requires that as a condition of participating in the state **Medicaid**, a health insurance program for low income individuals and

those with disabilities, reimbursement program, states must establish standards of practice for drug utilization review (DUR) by the pharmacist.

A **DUR** is an authorized, structured, ongoing program that collects, analyzes, and interprets drug use patterns to improve patient outcomes. OBRA requires a review of drug therapy before each prescription is filled. The pharmacist reviews the patient profile on each new prescription and refill utilizing pharmacy computer software. The drug utilization review includes screening for the following:

- ◆ Over/under utilization
- ◆ Therapeutic duplications
- ◆ Drug-disease interactions
- ◆ Drug-drug interactions
- ◆ Incorrect dosage or duration of therapy
- ◆ Drug-allergy interactions
- ◆ Clinical abuse and/or misuse

Under the law a pharmacist, or the technician acting on the pharmacist's behalf, must also make an offer to counsel the patient or customer, but this person may refuse such counseling. The pharmacist must offer to discuss and review with the patient the following:

- ◆ Name and description of medicine
- ◆ Dosage form
- ◆ Dose
- ◆ Route of Administration
- ◆ Duration of drug therapy
- ◆ Action to take after a missed dose
- ◆ Common severe side effects or **adverse effects**, undesired harmful effect resulting from a medication
- ◆ Therapeutic **contraindications**, a specific situation in which a drug, procedure, or surgery should not be used because it may be harmful to the patient
- ◆ Methods for self monitoring of the drug therapy
- ◆ Refill information
- ◆ Proper storage of the drug
- ◆ Special directions and precautions for preparation, administration, and use by the patient



FIGURE 2. It is the pharmacist's responsibility to guide and direct the customer. However, sometimes the needs and wants of the customer can affect the pharmacist's recommendations.

While OBRA 90 was geared to ensure that Medicaid patients receive specific pharmaceutical care, the overall result of this law provided that the same type of care is given to all patients. OBRA also requires the pharmacist to make a reasonable effort to obtain, record, and maintain patient information. Patient profile should include the following information:

- ◆ Patient name
- ◆ Patient address
- ◆ Patient telephone number
- ◆ Patient date of birth and gender
- ◆ Patient medical history

Some tips on how pharmacy technicians can help to create a patient centered pharmacy:

- ◆ Get to know your customers so you can establish trust right from the start.
- ◆ Reassure your customers that you are there to help. Use **empathy**, the ability to understand and share the feelings of another, to help patients feel valued.
- ◆ Engage your customer by using easy to understand language and encourage an open dialogue.
- ◆ Offer your continued support whether that means solving an insurance issue or contacting the patient's healthcare provider.



FIGURE 3. By working together with your pharmacist, you can be sure that your medications are taken safely, effectively, and appropriately to maintain your good health.

PATIENT COUNSELING SITUATIONS IN WHICH A PHARMACIST WOULD BE CALLED

Most states require pharmacists to counsel or offer counseling to patients. The following are instances where a pharmacist is required to provide counseling to patients:

- ◆ Dispensing a prescription to a new patient.
- ◆ Dispensing a new medication to an existing patient.
- ◆ Substituting a **generic** created to be the same as an existing approved brand name drug in dosage, safety, and quality, medication for a name brand medication.



FURTHER EXPLORATION...

ONLINE CONNECTION: Counseling for Improved Medication Adherence

In order to provide the best care a pharmacist should develop and build a relationship with each patient. This makes the patient feel more confident and comfortable in providing their medical history to the pharmacist, allowing the pharmacist to gather the proper information needed to ensure the patient gets the maximum therapeutic value from their medications. Each patient deserves and should have time with the pharmacist before they leave the pharmacy. This helps patients understand why they are taking the medication and will help to increase medication adherence. Read the article “Counseling for Improved Medication Adherence,” at the website <https://www.pharmacytimes.com/publications/issue/2011/september2011/counseling-for-improved-medication-adherence/>. Reflect on some of the reasons why patients do not take their prescribed medications. How can the counseling guidelines in Table 2 help to ensure that patients take their medications properly?

- ◆ Change in dose, strength, route of administration, or directions for use.
- ◆ Refilling an existing medication.

In a major attempt to improve patient safety, the Illinois Department of Financial and Professional Regulations (IDFPR) adopted new rules regarding patient counseling by a pharmacist. The new legislation that took effect in August of 2017 is aimed at achieving better medication compliance, minimizing drug interactions, making patients aware of side effects, and achieving better results for patients from their medication therapies. The new law requires a pharmacist to provide verbal counseling for the following:

- ◆ The pharmacy dispenses any prescription to a new patient.
- ◆ The pharmacy dispenses any new medications to an existing patient.
- ◆ The pharmacy dispenses any prescriptions where something has been changed by the prescribing physician. This includes any change of dosage, dosage form, strength, route of administration, or changes in the directions.

The pharmacist must still offer to provide patients with counseling on every prescription that is dispensed. Mail order pharmacies must use alternative forms of patient information and notify patients in writing that the pharmacist is available and that the patient is advised to contact the pharmacist regarding their medication.

Many pharmacists are now authorized to administer immunizations and vaccinations. Pharmacist must obtain oral or written consent and provide oral or written information to the patient prior to immunization or vaccination.

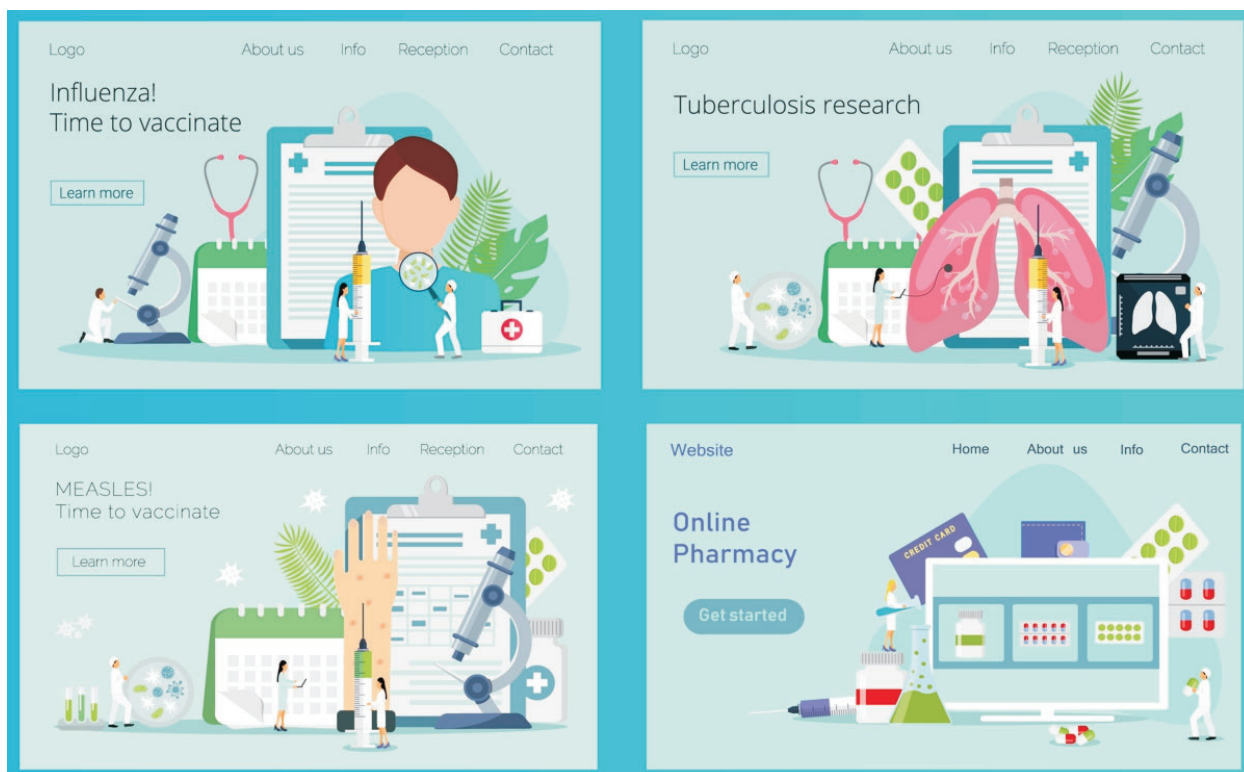


FIGURE 4. Pharmacists must offer remote counseling to patients not physically at the pharmacy as well as offer counseling for vaccines and vaccinations.

A pharmacist in an **institutional pharmacy**, a pharmacy in facilities where patients receive care on site, for example a hospital, is not required to provide patient counseling unless drugs are dispensed by the pharmacy upon a patient’s discharge from the institution.

Summary:



Patient counseling refers to the process of providing vital information, advice, and assistance to ensure that medications are taken properly. Pharmacy technicians are not licensed to advise customers with regard to medications and their uses. Technicians can instruct patients according to the clearly printed directions on the bottle of medication and they are allowed to answer simple questions like whether or not a medication needs to be taken with food. Pharmacy technicians can ask the patient if they would like counseling but cannot perform the counseling. The patient must be referred to the pharmacist.

OBRA 1990 initiated new regulations for pharmacists when dealing with Medicaid patients. Pharmacists would be required to perform a drug utilization review before filling a prescription and provide counseling to patients receiving medications. Even though these regulations were mandated for Medicaid patients, the overall result of the act provided that the same type of care is given to all patients. OBRA also estab-

lished requirements that ensure that pharmacists maintain proper records for patients who receive prescription medications.

Checking Your Knowledge:



1. Explain what type of information a pharmacy technician may give to a patient.
2. Explain the Omnibus Budget Reconciliation Act (OBRA) of 1990.
3. Explain what a drug utilization review is and what should be included in the review.
4. Describe the information that should be included in a patient profile.
5. Describe situations in which a pharmacist would be called upon for patient counseling.

Expanding Your Knowledge:



Visit your local pharmacy. Ask the pharmacist to share with you situations in which the pharmacist would be called upon for patient counseling. Ask to see the area where patient counseling takes place. Pay special attention to the pharmacist's communication skills. Share your findings with your class.

Web Links:



Examples Pharmacy Patient Counseling

<https://www.pharmacy-staffing.com/examples-pharmacy-patient-counseling/>

Expanding Pharmacy Technicians Roles to Assist With Patient Medication Adherence

<https://www.cdc.gov/dhds/pubs/docs/SIB-feature-June2019-508.pdf>

Pharmacist Communication Shown to Increase Medication Adherence and Reduce Errors

<https://www.nabp.pharmacy/newsroom/news/pharmacist-communication-shown-to-increase-medication-adherence-and-reduce-errors/>