A National Web Conference on the Use of Health IT to Reduce Medication Errors and Improve Patient Safety

August 26, 2014
2:30pm – 4:00pm ET
Moderator and Presenters

Disclosures

Moderator:

P. Jon White, M.D.*

Agency for Healthcare Research and Quality

Presenters:

Steven Atlas, M.D.*

Richard W. Grant, M.D., M.P.H.*

William Basco, M.D., M.S.*

Michael Weiner, M.D, M.P.H.*

*Have no financial, personal, or professional conflicts of interest to disclose.
The Medication Metronome Trial: A Health IT System to Improve Medication Management and Laboratory Monitoring for Chronic Diseases

Steven J. Atlas, M.D., M.P.H.
Massachusetts General Hospital
Richard W. Grant, M.D., M.P.H.
Kaiser Permanente Northern California
Background

• Despite the availability of effective therapies, many U.S. patients with common chronic conditions such as diabetes, hyperlipidemia, and hypertension do not reach treatment goals.

• Medications are added for patients who are not succeeding with lifestyle interventions, but many still do not achieve recommended goals.

• Novel health IT tools have the potential to support chronic condition management in primary care settings.
• Lack of **timely medication intensification** and **inadequate safety monitoring** are two prevalent and potentially modifiable barriers to effective and safe management of chronic conditions.

• Major challenges of visit-based care include competing demands for time and missed follow-up visits.

• Current visit-based delivery models do not include systematic efforts to engage in active risk factor management between visits.
“Come Back in 3 Months”

• Scheduled office visits are an unreliable method for planning future medication changes.

<table>
<thead>
<tr>
<th>Table 1: Scheduled Visits, MGH Internal Medicine Associates, 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits</td>
</tr>
<tr>
<td>-----------------------</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Patient Seen</td>
</tr>
<tr>
<td>Patient Cancelled</td>
</tr>
<tr>
<td>Provider Cancelled</td>
</tr>
<tr>
<td>Patient “No Show”</td>
</tr>
</tbody>
</table>

Fewer than two-thirds of planned visits actually occurred.
Medication Metronome

• **Goal**: Create an IT infrastructure to support **planned medication adjustment**
  - Writing prescription triggers future laboratory testing
  - Supports **nonvisit-based** management

• **Objective**: To test a model of chronic disease management for between-visit laboratory monitoring

• Study focused on A1c, LDL, and BP-related medicines

• **Hypotheses**:
  - H1: Metronome system will reduce delays in efficacy and safety monitoring
  - H2: Reduced delays between monitoring and prescribing will result in better risk factor control
• **Study setting**: Two primary care practices within the Massachusetts General Primary Care Practice-Based Research Network

• **Study design**: Primary care physicians (PCPs) within these two practices randomly assigned to intervention (n=22) or control (n=22)

• **Procedures**: Intervention PCPs trained to use Medication metronome prior to start of trial

• **Clinical trial**: Metronome tool active in intervention arm for 1 year
Methods—Intervention

Control PCPs
• Usual care = electronic health record (EHR) with medication prescription interface

Intervention PCPs
• Additional features in medication prescription interface:
  ► Future laboratory test scheduling
  ► Reminder letters sent to patients when labs due
  ► Test tracking, results (or lack) sent to PCP
• Active when ordering new prescriptions or changing doses to treat:
  ► Type 2 diabetes (oral hypoglycemic medications)
  ► Hypertension (diuretics, ACEI/ARBs)
  ► Hyperlipidemia (statins)
Electronic Prescription Interface with Medication Metronome Module

Control/Usual Care EHR Medication Ordering Interface
Electronic Prescription Interface with Medication Metronome Module
Electronic Prescription Interface with Medication Metronome Module

Efficacy and Safety Monitoring

Last AST (SGOT): 25 on 01/19/2011
Last ALT (SGPT): 10 on 01/19/2011

Order lipid panel for efficacy monitoring to be done on 02/11/2014.
No new SGOT/SGPT order is necessary at this time.
No new CPK order is necessary at this time.

Other pending labs existing - For Hepatic Panel: due on 07/08/2011.
• Medication metronome: Initiates automated patient outreach
  ▶ Mailed letter and lab slip 1 week before the test is due
  ▶ Mailed second letter and lab slip 1 week after test due date if no result is found
  ▶ Notification of persistently overdue lab results (> 3-weeks after due date) is added to physician “Watchlist” of test results in EHR
Methods—Efficacy Outcomes

- **Time to event outcomes for A1c and LDL tests:**
  - Time from drug order to next lab assessment
  - Time from drug order to lab result being at or below goal
  - Analysis: Cox proportional hazards regression

- **Proportion of time at goal:** % follow-up time over 6 months that a patient was at or below risk factor goal
  - HbA1c ≤ 7% or ≤ 9% among patients prescribed hypoglycemic agents
  - LDL cholesterol ≤ 130 mg/dl (≤ 100 mg/dl for patients with cardiovascular risk)
  - Analysis: Linear regression
Methods—Safety Outcomes

• **Safety outcome**: % safety monitoring laboratory tests completed within 12 weeks of the medication order
  - Creatinine (diuretics, ACE-inhibitors, or metformin)
  - Liver function testing after initiating statins
  - Analysis: Logistic regression

• **Multivariable models**: Adjusted for patient age, gender, race/ethnicity, primary language, baseline lab value, with clustering by PCP
## Patient Characteristics

* 3,655 unique patients representing 5,454 unique medication orders

<table>
<thead>
<tr>
<th></th>
<th>Intervention (n=2049)*</th>
<th>Control (n=1606)*</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age, mean (SD)</td>
<td>65.9 (13.1)</td>
<td>65.7 (12.8)</td>
<td>0.64</td>
</tr>
<tr>
<td>Gender, female (%)</td>
<td>48%</td>
<td>53%</td>
<td>0.002</td>
</tr>
<tr>
<td>Race, non-white (%)</td>
<td>15.7%</td>
<td>19.6%</td>
<td>0.01</td>
</tr>
<tr>
<td>Insurance, commercial (%)</td>
<td>49.4%</td>
<td>49.3%</td>
<td>0.69</td>
</tr>
<tr>
<td>English primary language (%)</td>
<td>95.3%</td>
<td>92.4%</td>
<td>&lt;0.001</td>
</tr>
<tr>
<td>Clinic visits 3 years, (SD)</td>
<td>9.2 (5.8)</td>
<td>9.2 (5.9)</td>
<td>0.90</td>
</tr>
<tr>
<td>Baseline HbA1c , mean (SD)</td>
<td>7.9 (1.6)</td>
<td>8.1 (1.9)</td>
<td>0.05</td>
</tr>
<tr>
<td></td>
<td>(n=439)</td>
<td>(n=424)</td>
<td></td>
</tr>
<tr>
<td>Baseline LDL, mean (SD)</td>
<td>117.7 (39.8)</td>
<td>121.6 (43.8)</td>
<td>0.07</td>
</tr>
<tr>
<td></td>
<td>(n=1,069)</td>
<td>(n=633)</td>
<td></td>
</tr>
<tr>
<td>Diabetes (%)</td>
<td>29.6%</td>
<td>32.3%</td>
<td>0.08</td>
</tr>
<tr>
<td>Hypertension (%)</td>
<td>76.6%</td>
<td>76.7%</td>
<td>0.96</td>
</tr>
<tr>
<td>Coronary Artery Disease</td>
<td>18.5%</td>
<td>18.1%</td>
<td>0.73</td>
</tr>
</tbody>
</table>
Time from Prescription to Next LDL

- Cholesterol-lowering medications, LDL (n=1,846)
  - Hazard ratio (95% CI): 1.15 (1.01-1.32)
Goal = LDL ≤ 100/130  (n=810 above goal at baseline)

Hazard ratio (95% CI): 1.26 (0.99-1.62)
Time from Prescription to Next A1c

- Diabetes medications, HbA1c (n=880)
  - Hazard ratio (95% CI): 1.05 (0.88-1.25)
Goal = HbA1c ≤ 7 (n=622 above goal at baseline)

- Hazard ratio (95% CI): 0.93 (0.64-1.36)
Time from Prescription to A1c Goal

- Goal = HbA1c ≤ 9 (n=175 above goal at baseline)
  - Hazard ratio (95% CI): 1.18 (0.60-2.32)
Primary Effectiveness Outcome*

- % time that a patient is at or below risk factor goal

<table>
<thead>
<tr>
<th></th>
<th>Intervention</th>
<th>Control</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>Adjusted Mean %</td>
<td>N</td>
</tr>
<tr>
<td>Hyperlipidemia: LDL ≤ 100 or ≤ 130</td>
<td>1053</td>
<td>57.9%</td>
<td>621</td>
</tr>
<tr>
<td>DM: HbA1c ≤ 7</td>
<td>441</td>
<td>32.5%</td>
<td>418</td>
</tr>
<tr>
<td>DM: HbA1c ≤ 9</td>
<td>441</td>
<td>83.0%</td>
<td>418</td>
</tr>
</tbody>
</table>

* Intention-to-treat population
### Primary Effectiveness Outcome†

- % time that a patient is at or below risk factor goal

<table>
<thead>
<tr>
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<th>Intervention</th>
<th>Control</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>Adjusted Mean %</td>
<td>N</td>
</tr>
<tr>
<td><strong>Hyperlipidemia: LDL ≤ 100 or ≤130</strong></td>
<td>329</td>
<td>59.7%</td>
<td>621</td>
</tr>
<tr>
<td><strong>DM: HbA1c ≤ 7</strong></td>
<td>160</td>
<td>33.3%</td>
<td>418</td>
</tr>
<tr>
<td><strong>DM: HbA1c ≤ 9</strong></td>
<td>160</td>
<td>83.3%</td>
<td>418</td>
</tr>
</tbody>
</table>

† “On-Treatment” = e.g., Metronome order used
Primary Safety Outcome

- % laboratory tests measured within 12 weeks

<table>
<thead>
<tr>
<th></th>
<th>Intervention</th>
<th>Control</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>BP Medication: Creatinine, K</td>
<td>50.1%</td>
<td>49.6%</td>
<td>0.89</td>
</tr>
<tr>
<td>Metformin: Creatinine</td>
<td>35.4%</td>
<td>40.5%</td>
<td>0.22</td>
</tr>
<tr>
<td>Statin: AST/ALT</td>
<td>23.9%</td>
<td>27.6%</td>
<td>0.28</td>
</tr>
</tbody>
</table>
### PCP Survey: Barriers to Use

<table>
<thead>
<tr>
<th>Barrier</th>
<th>n  (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not want to schedule lab testing using this system</td>
<td>6 (30%)</td>
</tr>
<tr>
<td>Not clear how to use the interface to order and schedule lab tests</td>
<td>6 (30%)</td>
</tr>
<tr>
<td>Using the module required extra time</td>
<td>5 (25%)</td>
</tr>
<tr>
<td>Other barriers</td>
<td>7 (35%)</td>
</tr>
<tr>
<td>No barriers to use of the module</td>
<td>3 (15%)</td>
</tr>
</tbody>
</table>

*Please note: Survey respondents could check multiple barriers. PCPs who checked “other barriers” were asked to specify.*
Study Limitations

- Despite initial enthusiasm from stakeholders and PCP advisors, PCPs did not embrace this method of nonvisit-based care.
  - Only 660 medication orders used the IT system (21% of possible orders).
  - PCP surveys:
    - Lack of incentive to increase nonvisit-based management in fee-for-service environment
    - Lack of established workflows
    - Time required to explain to patients what to expect
    - Outside labs not captured by system frustrated PCPs and patients
Conclusions

• A health IT tool to support between-visit laboratory monitoring following the initiation or change of chronic disease medications in office visits:
  ► Did not increase risk factor control or safety monitoring compared to usual care
  ► Decreased the time to laboratory testing and goal attainment following initiation or change of cholesterol-lowering medications (but not glycemia)
Implications

- Persistent gaps in goal attainment for managing chronic disease support the role of nonvisit-based care to supplement and extend face-to-face interactions.

- Health IT innovations that support between-visit work represent a new model of care delivery that will require more patient and provider input to support standard workflow and educational outreach.

- New payment models that reimburse for nonvisit-based medication management may be needed before visit-independent medication management systems will be more widely adopted.
Acknowledgements

• Funding: Agency for Healthcare Research and Quality - R18 HS018648

• Team:
  ▶ Richard W. Grant
  ▶ Steven J. Atlas
  ▶ Michael C. Jernigan
  ▶ Jeffrey M. Ashburner
  ▶ Jaime Chang
  ▶ Leila H. Borowsky
  ▶ Yuchiao Chang
Assessment of Pediatric Look-alike, Sound-alike (LASA) Substitution Errors

William T. Basco, Jr., M.D., M.S.
Department of Pediatrics, Medical University of South Carolina
Funding: Agency for Healthcare Research and Quality, R03 HS018841
**Definition: LASA Errors**

- LASA errors can occur when the names of two drugs
  - Look alike = orthographic similarity (e.g., Tegretol/Tequin)
  - Sound alike = phonetic similarity (e.g., Adderall/Inderal)


- 2008 report identified over 1,500 drug pairs that have LASA potential. (*US Pharmacopeia*, January 2008)
• Phatek and co-authors completed two related studies that evaluated potential LASA errors in pediatric data.
  ▶ *J Am Pharm Assoc* 2001;41:324

• Tested drug pairs based on orthographic similarity of drug names (shared letters and structures)
  ▶ Found 1,138 potential errors; the error probability increased with increasing orthographic similarity
  ▶ Neither study reported actual LASA frequency

• Refill error
  ▶ Drug A, Drug A, Drug A, then Drug B
  ▶ Constitute about 80% of LASA errors

• Initial dispensing error
  ▶ Drug B, Drug A, Drug A, Drug A
  ▶ Constitute about 20% of LASA errors
Our approach has been from the pharmacy viewpoint.

Dispensing patterns could be used to trigger a screening alert at the point of dispensing...

- Drug A, Drug A, Drug A, then Drug B

Within 12 months = usual drug  Within 6 months = screening alert

- Either drug in a pair could serve as usual drug

One can then calculate frequency of screening alerts (proxy for frequency of potential LASA error).
Pilot study to test this approach
- Utilized a selected set of 11 LASA drug pairs
- Found a screening alert frequency of 0.28 screening alerts per 1,000 prescriptions

Much lower than dosing error frequency in pediatric outpatient prescriptions of 7-15%
Conclusions and Implications

• The frequency of pediatric LASA errors appears to be much lower than other types of pediatric medication errors.
• Evaluating these screening alerts does not appear to impose an unbearable burden on pharmacies.
• Lesson learned: Pay attention to tradeoff between “signal and noise.”
The AHRQ-Sponsored HIT Portfolio Project (R03)

Evaluating the Severity of Look-Alike, Sound-Alike Drug Substitutions in Children

William T. Basco, Jr.; Sandra S. Garner, Ph.D.; Myla Ebeling; and Kit Simpson
Department of Pediatrics, College of Pharmacy, and College of Health Professions, Medical University of South Carolina
Funding: Agency for Healthcare Research and Quality, R03 HS018841
HIT Portfolio Grant
Approach and Aims

• We kept the pharmacy screening perspective:
  ► Dispensing patterns could be used to identify potential LASA errors by triggering a screening alert.
  ► Pharmacists could query patients or providers about indications for prescriptions to verify whether it was appropriate to receive the second drug.

• The aims of this study were to:
  ► Utilize a modified Delphi panel approach to evaluate the potential severity of specific LASA drug substitution errors.
  ► Estimate frequencies of screening alerts (potential LASA substitution errors) in these drug pairs.
Method: Two Published Sources of LASA Pairs

- Institute for Safe Medication Practices (ISMP) list of Confused Drug Names

- MedMarx – U.S. voluntary error reporting system

- Merged ISMP with MedMarx lists of LASA pairs

- Merged list = 1,784 unique pairs, but after reciprocating = 3,568 pairs
Method: Reducing the List

• Goal was always to focus on outpatient preparations
• Review process removed 867 pairs (of 1,784)
• Examples removed
  ▶ Injectable preparations
  ▶ Non-oral preparations
  ▶ Vitamins
  ▶ ALL of the above choices introduced limitations; can discuss if we have time!
• After exclusions—retained 917 pairs
• Reciprocated for Delphi surveys = 1,834 pairs
Method: Modified Delphi Plan

• Practicing pediatricians scored the LASA substitution errors based on the degree of POTENTIAL HARM

• Survey development:
  ► Cognitive pretesting of concepts and terminology
  ► Piloting of surveys for wording, online format, determine time to complete
  ► 50-pair surveys took ~20 minutes

• Resulted in 37 versions of survey for Round 1

• Recruited a convenience sample of 37 participants from professional organization listservs
  ► 59% female
  ► 9 states were represented
Anatomy of a Pair Error

- Each pair consists of two drugs (Drug A/Drug B).
- No suggestion of direction, so a patient could receive Adderall instead of Inderal, or Inderal instead of Adderall.
- Nomenclature used:
  - Drug A = “intended” drug
  - Drug B = “delivered” drug
  - Reciprocating means that each pair also appeared as Drug B, Drug A, with Drug B as the “intended” drug, etc.

- With one LASA error, two drug errors occur, leading to two problems for patient:
  - Estimate potential harm of NOT receiving intended drug
  - Estimate potential harm of receiving delivered drug instead
Modified Delphi Process

• Utilized RedCAP online survey tool

• Round 1
  ► Emailed unique survey link to each participant
  ► Each participant scored 50 pairs

• Round 2
  ► Emailed unique survey link to each participant
  ► Each participant scored 50 DIFFERENT pairs

• Therefore, between Rounds 1 and 2, each pair scored by two participants
Participants scored pairs on potential harm assessed on a continuous scale from “no harm, little harm, moderate harm, severe harm,” to “death.”
Assumptions for Participants (Developed Through Pretesting)

• Imagine that…
  ► No medical conditions other than the one for which he or she was to receive the intended drug
  ► No drug allergies
  ► No dose change issues
  ► 1-month error period for drugs meant to be taken daily, meaning that the error would NOT recur at next dispensing

• Do not estimate the CHANCE that harm will occur. Evaluate the degree of potential harm that might occur should the patient experience adverse effects from not receiving the intended drug or receiving the delivered drug by mistake
Distribution of Scoring for Rounds 1 (Blue) and 2 (Red)
Method: Cluster Analysis and Selection of Round 3 Pairs

• Kept any pair where EITHER of the two participants scored one of the two errors “potential harm” above the cutoff
  ► Cutoff value was 82

• This process identified 608 pairs for Round 3
  ► Each pair scored x 3 participants
  ► Averaged those 3 results to get final scatterplot
Scatterplot of Average Round 3 Scores

Average Potential Harm Score for Each LASA Pair Evaluated in Round 3
Pairs with Potential Substitution Errors and Pairs Without

Avg Potential Harm of Receiving Delivered Drug

Avg Potential Harm of Not Receiving Intended Drug

- ○ No Potential Substitution Error
- ▲ At Least One Potential Substitution Error
# List of Top 10 LASA Errors, Ranked by Potential Harm of Receiving the Delivered Drug in Error

<table>
<thead>
<tr>
<th>Delivered Drug</th>
<th>Intended Drug</th>
<th>Average Harm Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>K Dur</td>
<td>Kayexalate</td>
<td>93</td>
</tr>
<tr>
<td>Cyclosporine</td>
<td>Cyclophosphamide</td>
<td>92</td>
</tr>
<tr>
<td>Lanoxin</td>
<td>Levothyroxine</td>
<td>92</td>
</tr>
<tr>
<td>Coumadin</td>
<td>Cardura</td>
<td>91</td>
</tr>
<tr>
<td>Jantoven</td>
<td>Januvia</td>
<td>90</td>
</tr>
<tr>
<td>Warfarin</td>
<td>Levaquin</td>
<td>90</td>
</tr>
<tr>
<td>Coumadin</td>
<td>Mephyton</td>
<td>89</td>
</tr>
<tr>
<td>Coumadin</td>
<td>Avandia</td>
<td>88</td>
</tr>
<tr>
<td>Jantoven</td>
<td>Janumet</td>
<td>88</td>
</tr>
<tr>
<td>Azathioprine</td>
<td>Azithromycin</td>
<td>87</td>
</tr>
<tr>
<td>Temodar</td>
<td>Tambocor</td>
<td>86</td>
</tr>
</tbody>
</table>
List of Top 10 LASA Errors, Ranked by Potential Harm of NOT Receiving the Intended Drug

<table>
<thead>
<tr>
<th>Intended Drug</th>
<th>Delivered Drug</th>
<th>Average Harm Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warfarin</td>
<td>Levaquin</td>
<td>95</td>
</tr>
<tr>
<td>Ethmozine</td>
<td>Ethambutol</td>
<td>93</td>
</tr>
<tr>
<td>Cyclophosphamide</td>
<td>Cyclosporine</td>
<td>92</td>
</tr>
<tr>
<td>Prograf</td>
<td>Prozac</td>
<td>92</td>
</tr>
<tr>
<td>Dantrium</td>
<td>Danocrine</td>
<td>91</td>
</tr>
<tr>
<td>Cordarone</td>
<td>Cardene</td>
<td>89</td>
</tr>
<tr>
<td>Coumadin</td>
<td>Avandia</td>
<td>89</td>
</tr>
<tr>
<td>Folex</td>
<td>Foltix</td>
<td>89</td>
</tr>
<tr>
<td>Norvir</td>
<td>Norvasc</td>
<td>88</td>
</tr>
<tr>
<td>Oxcarbazepine</td>
<td>Oxaprozin</td>
<td>88</td>
</tr>
</tbody>
</table>
Aim 2

Estimate frequencies of screening alerts (potential LASA substitution errors) in these drug pairs
Method: Estimating Frequency of LASA Substitution Errors

• Approach: The frequency of screening alerts is
  ► An estimate of the LASA error frequency
  ► An estimate of the pharmacy screening burden: how many alerts would this approach generate?
• Prescription data source
  ► 2000-2009 South Carolina Medicaid paid ambulatory claims data for patients < 20 years old
• Inclusion: 608 Round 3 LASA pairs
• Used the most inclusive definition of LASA error
  ► ANY subject who received BOTH drugs in a LASA pair within 6 months of each other
    o LASA error = Drug A, then Drug B, within 6 months of each other
  ► This gives the MAXIMUM error estimate
Results: The Good News

- 34% of the LASA pairs
  - No patient received both drugs within a 6-month period.

- 49% of the LASA pairs
  - The cumulative total of subjects who received both drugs in a pair amounted to < 1 screening alert per day in South Carolina over the 10-year data span.

- Therefore, for 83% of LASA pairs in Round 3, the pharmacy screening burden can be considered low.
Results: The Bad News

• By contrast, among the remaining 17% (n=103) LASA pairs, there were 27 screening alerts per day in the state.

• There were 19 pairs (3.1%) where >1,000 subjects received both drugs within 6 months of one another.

• Examples:
  - Prevacid/Prednisone
  - Zoloft/Zyrtec
  - Ciprofloxacin/Cephalexin
Global Project Limitations

• Because of the sheer number of drugs involved, we had to limit the pairs that were scored in the Delphi process.

• Eliminated drugs that would be of interest to other parties (e.g., inpatient).

• List of LASA pairs is not pediatric specific, so pediatricians are unfamiliar with many drugs.

• Input only from pediatricians. Future work should include pharmacists.
Conclusions and Implications Regarding Harm Ratings

• Pediatricians have ranked 608 potential LASA error combinations by harm rating

• Gives researchers and clinicians idea of how to prioritize approach
Conclusions and Implications Regarding Frequency

• For 83% of the LASA pairs
  ▶ A child receiving both drugs in a LASA pair within a 6-month period should trigger a screening alert for potential LASA substitution error.
  ▶ Will not produce a significant burden on pharmacies.

• For 17% of the LASA pairs
  ▶ More work is needed to refine dispensing patterns that trigger screening alert in order to maximize the tradeoff between degree of potential harm versus screening burden.

• For 3.1% of the LASA pairs
  ▶ So many subjects receive both drugs within a 6-month period that screening for potential substitutions via this method may not be possible.
Next Steps for Us

• For the 17%
  ► Evaluate the PPV of the potential errors found
  ► What dispensing pattern maximizes the PPV?

• For the 3%
  ► Combine the error frequency data with potential harm data to determine potential drug pairs to use in future efforts

• With the next grant…
  ► Test real-time screening for pediatric LASA errors in clinical pharmacies
  ► Perhaps through an R18 mechanism
Project Lessons and Challenges

• LASA pair lists are ALWAYS being updated—how often should one add new drug pairs?
• Finding good lists of generic preparations of the brand names that appear in LASA pair lists has been a challenge
  ► You must cross-walk …
  ► Brand or generic name, as listed in the LASA pair
  ► WITH generic form of the drug
  ► WITH all brand versions of the generic form
• A screening alert ≠ true LASA error
  ► Limited clinical data available to answer this in administrative data


Contact Information

Bill Basco  bascob@musc.edu
Phone: 843-876-8512
Improving the Approach to Electronic Medication Reconciliation

Michael Weiner, M.D., M.P.H.
mailto:mweiner@iu.edu

Indiana University Center for Health Services and Outcomes Research
Regenstrief Institute, Inc.
Center for Health Information and Communication,
Department of Veterans Affairs, Veterans Health Administration,
Health Services Research and Development Service CIN 13-416,
Richard L. Roudebush VA Medical Center
Indianapolis, Indiana • August 2014

The views expressed herein are those of the author and do not necessarily represent the views of the Department of Veterans Affairs.
Goal for Today

• Identify at least three findings related to improving the approach to electronic medication reconciliation used in the process of electronic prescribing.
Abbreviations

• Med = medication
• Recon = reconciliation
• ADE = adverse drug event
• EHR = electronic health record
• PADE = potential ADE
• PAML = pre-admission medication list
# A Real Transition in Care

<table>
<thead>
<tr>
<th>Day</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>• Discharge from hospital (heart failure)</td>
</tr>
<tr>
<td></td>
<td>• Furosemide is discontinued in orders but not in discharge instructions</td>
</tr>
<tr>
<td>5</td>
<td>• Home nurse discovers furosemide in pill boxes</td>
</tr>
<tr>
<td>6</td>
<td>• Creatinine increases from 1.6 to 3.7</td>
</tr>
<tr>
<td></td>
<td>• Patient is referred for emergency care but declines</td>
</tr>
<tr>
<td>7</td>
<td>• Patient declines to be evaluated</td>
</tr>
<tr>
<td>12</td>
<td>• Patient is found confused at home: creatinine 5.2, potassium 7.6</td>
</tr>
<tr>
<td></td>
<td>• Admitted to intensive care</td>
</tr>
</tbody>
</table>
Med Discrepancies on Discharge

41%

Discharges with medication discrepancies
20% Discharges to home with adverse events
Example of Computerized Med-list Output

<table>
<thead>
<tr>
<th>MEDICATION</th>
<th>DESCRIPTION</th>
<th>ORDERED</th>
<th>DUE DATE</th>
<th>DOCTOR</th>
<th>LOCATION</th>
<th>QUANTITY</th>
<th>DISPENSED</th>
<th>EXPIRY DATE</th>
<th>CURRENT SUPPLY</th>
<th>REMAINING</th>
<th>REFILLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASPIRIN (BAYER TAB 81MG)</td>
<td>TAKE 1 TABLET BY MOUTH DAILY</td>
<td>5-Dec-11</td>
<td>9876-5 SEUSS DR</td>
<td>Whoville Clinic</td>
<td>30 tabs</td>
<td>4-Dec-12</td>
<td>30-Feb-12</td>
<td>2 remain of 4 prescribed</td>
<td>30-Jan-12 Qty: 30</td>
<td>5-Dec-11 Qty: 30</td>
<td></td>
</tr>
<tr>
<td>ASPIRIN (BAYER TAB 81MG)</td>
<td>TAKE 1 TABLET BY MOUTH DAILY</td>
<td>14-Aug-11</td>
<td>9876-5 SEUSS DR</td>
<td>Whoville Clinic</td>
<td>30 tabs</td>
<td>13-Aug-12</td>
<td>4-Dec-11</td>
<td>0 remain of 4 prescribed</td>
<td>3-Nov-11 Qty: 30</td>
<td>28-Sep-11 Qty: 30</td>
<td></td>
</tr>
<tr>
<td>ASPIRIN (BAYER TAB 81MG)</td>
<td>TAKE 1 TABLET BY MOUTH DAILY</td>
<td>17-Mar-11</td>
<td>9876-5 SEUSS DR</td>
<td>Whoville Clinic</td>
<td>30 tabs</td>
<td>16-Mar-12</td>
<td>14-Aug-11</td>
<td>0 remain of 4 prescribed</td>
<td>14-Jul-11 Qty: 30</td>
<td>10-Jun-11 Qty: 30</td>
<td></td>
</tr>
<tr>
<td>ASPIRIN (BAYER TAB 81MG)</td>
<td>TAKE 1 TABLET BY MOUTH DAILY</td>
<td>17-Mar-11</td>
<td>9876-5 SEUSS DR</td>
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<td>30 tabs</td>
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<td>14-Aug-11</td>
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<td>14-Jul-11 Qty: 30</td>
<td>10-Jun-11 Qty: 30</td>
<td></td>
</tr>
</tbody>
</table>
Med Recon Assessment

The process of comparing current medications to planned medications (e.g., new orders) at transition points in medical care
Med Recon Is More Than Just Assessment

1. Assess
2. Compare
3. Decide
4. Communicate
5. Document
The Joint Commission Safety Goal
NPSG.03.06.01

• Coordinate med information during transitions in care, inside and outside of the organization.
• Communicate with other providers.
• Educate patients about safe medication use.
• Provide the patient with written information about meds after inpatient and outpatient encounters.
  ► Dosing information
  ► Indication (purpose) for meds
• Carry medication information at all times.
Specific Aims

1. Integrate an electronic med recon system with an electronic prescribing system.

2. Conduct a randomized controlled trial of med recon.


• Hypothesis: Electronic facilitation of med recon will improve completion of med recon and will decrease the incidence of drug-related medical errors.
An EHR Adaptation for Med Recon

MedReconciliation Application (Careweb plug-in)

Medication list is sent to Gopher

Gopher (Clinical Physician Order Entry)

Query and retrieve the patient’s medication list from the repository

Reconciled medication list is sent to the Repository in the form of a note

MedHub (Prescriptions, dispensing repository)

Rgenestrief Institute Repository (EMR Database)
New EHR Module for Med Recon

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
<th>Strength</th>
<th>Current dose, route, frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>?</td>
<td>Acetamin/Hydrocodone</td>
<td>50 mg</td>
<td>TAKE 1-2 TABLETS EVERY 4 HOURS AS NEEDED FOR PAIN NO MORE THAN 8 IN</td>
</tr>
<tr>
<td>Not taking</td>
<td>Travoprost Ophth Sol 0.004%</td>
<td>50 1null</td>
<td>1 DROP(S) IN EACH EYE EACH EVENING</td>
</tr>
<tr>
<td>Taking</td>
<td>Bimatoprost Oph Sol</td>
<td>50 %</td>
<td>INSTILL 1 DROP(S) IN EACH EYE 2 TIMES A DAY</td>
</tr>
<tr>
<td>?</td>
<td>Bimatoprost Oph Sol</td>
<td>50 1%</td>
<td>INSTILL 1 DROP INTO BOTH EYES EVERY DAY IN THE EVENING</td>
</tr>
</tbody>
</table>

**Image:**

[Image of pills]

**Detail:**

21-Jan-2009, mL 1%, bottles, Qty: 1.0, Days Supply: 30, Refill #1

**Taking status:**

?  

**Current dose, route, frequency:**

INSTILL 1 DROP INTO BOTH EYES EVERY DAY IN THE EVENING

**Appropriateness:**

Taking as presc

**Comments:**
Examples of Variables to Consider

- Patients’ demographics and number of previous clinical encounters
- Providers’ characteristics, such as level of training
- Med history was performed; accuracy and timing
- Patients’ number of medications
- Med recon was performed; who did it; what sources were used
- Medications prescribed
- Reasons for not continuing a medication
- Med recon at outpatient follow-up visits
Examples of Reasons for not Continuing a Medication

• Drug contraindicated at this time
• Condition does not require treatment at this time
• Nondrug approach will be used
• Drug is nonformulary
• This drug will actually be used
• Different drug will be used
Main Ways that Drugs Can “Match”

- **Exactly**: drug, dose, route, and frequency
- **Drug** only (dose, route, or frequency differs)
- **Class** only (e.g., diuretic, or thiazide diuretic); drugs differ.
- **Indication** only (e.g., hypertension); classes differ.
Classifying Potential for Harm and Severity

• Confidence in potential for harm (any)
  - Little or no confidence
  - Slight to modest confidence
  - Less than 50% chance but close call
  - More than 50% chance but close call
  - Strong confidence
  - Virtually certain confidence

• Potential severity of harm
  - Significant (little or no threat to life)
  - Serious
  - Life-threatening
Signs of Potential ADEs (Must be Confirmed)

- **Diagnostic codes** associated with ADEs (e.g., urticaria, nephritis)
- **Specific drugs** often used to address ADEs (e.g., diphenhydramine for allergy)
- **Drug combinations** (e.g., digoxin and azithromycin)
- **Drugs and symptoms** (e.g., angiotensin converting enzyme inhibitor and cough)
- **Diagnoses and drugs** (e.g., angiotensin converting enzyme inhibitor and angioedema)
- **Drugs and miscellaneous conditions** (e.g., amitriptyline and age more than 65 years)
- **Laboratory triggers** (e.g., diuretic and hypokalemia)
- **Undesired encounters**: urgent visits, emergency visits, and hospitalizations
- **Incident reports**

Some Usability-Related Metrics

- Time spent
  - Total
  - Specific tasks
- Errors (medication errors)
- “Critical usability incidents“ affecting performance or satisfaction
- Satisfaction
- Workload (e.g., NASA Task Load Index)
  - Mental demand: how mentally demanding was the task?
  - Physical demand: how physically demanding was the task?
  - Temporal demand: how hurried or rushed was the pace of the task?
  - Performance: how successful were you in accomplishing task?
  - Effort: how hard did you have to work?
  - Frustration
Survey of Providers

• Accuracy of identifying meds
• Frequency of asking patients about meds
• Availability of tools and resources to help
• Ease of working with tools to identify, prescribe, and manage meds
• Potential clinical benefits
• Additional considerations
  ► Quality of tools
  ► Workflow compatibility
  ► Climate for implementation

Example of a New Design

MedList Manager | **Patient Adherence Report**

**Outpatient**

0 items in admit cart

<table>
<thead>
<tr>
<th>Drug</th>
<th>D/C Status</th>
<th>Adherence</th>
<th>Refills remaining: 2</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Citalopram 40 mg Tab</strong> (Celexa)</td>
<td></td>
<td></td>
<td></td>
<td>Refills remaining: 2</td>
</tr>
<tr>
<td>40 mg oral once daily before bed</td>
<td></td>
<td>Patient confirms (3 days ago)</td>
<td>Likely taking 85% ↑ 8%</td>
<td></td>
</tr>
<tr>
<td><strong>Fluticasone/salmeterol</strong> (Advair)</td>
<td>C</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100/50 mcg 1 puff twice daily</td>
<td></td>
<td>Patient confirms (3 days ago)</td>
<td>No supply 37% ↓ 23%</td>
<td></td>
</tr>
<tr>
<td><strong>Glyburide</strong> (Diabeta)</td>
<td></td>
<td></td>
<td></td>
<td>This order is pending activation in discharge orders</td>
</tr>
<tr>
<td>2.5 mg oral once daily</td>
<td></td>
<td></td>
<td></td>
<td>Remove from cart</td>
</tr>
</tbody>
</table>
Planning Med Recon

• Interviews with 13 professionals with a role in planning med recon implementation; organizational roles in quality improvement, information technology, medication safety, and education
• Assessed perceptions of implementation process, facilitators, and barriers
• Involve a multidisciplinary planning team
• Understanding principles of performance improvement facilitates implementation
• Integrate med recon into diverse workflows
• Some changes to roles may be needed
• Train staff
• Monitor compliance and impact on prescribing

Sanchez et al., *BMC Health Serv Res* 2014; 14 (1):290.
Additional Activities to Consider

• Consider hospital readmissions, outpatient visits, and morbidity
• Include a control group and an adequate sample size; randomize?
• Understand activity of the control group
• Use multiple sources of information in med recon

Additional Activities to Consider

• Integration with orders and decision support
• For which medications is a **subspecialist** responsible?
• Getting **discharge summary to match discharge instructions**
Patient-Reported Med Histories

- Self-service kiosk in primary care clinic
- EHR system showed patients’ responses
- 91 primary care providers were surveyed regarding attitudes, perceptions, and organizational climate for implementation
- 43% indicated that they did not believe that they had the necessary resources to manage med discrepancies
- Climate for implementation was suboptimal
- Most indicated that new approach was better than usual care

Lesselroth et al., Inform Prim Care 2011; 19 (2):105-18.
EHR Versus No EHR

• 469 patients transferred between 7 nursing homes and 3 hospitals were followed retrospectively (1999 to 2005)
• Compared Veterans in EHR system to non-VA patients in non-EHR system
• Measured med discrepancies at transfer, and ADEs
• No significant differences between groups
• Are specialized computer tools needed?

Med Recon Can Improve Med Discrepancies

- Randomized 14 inpatient general medical teams at two academic hospitals
- 322 patients admitted to 14 medical teams, for whom a medication history could be obtained before discharge
- Computerized med recon tool and process redesign
- Involved physicians, nurses, and pharmacists
- Main outcome: unintentional discrepancies between preadmission medications and admission or discharge medications with potential for harm
- Potential ADEs per patient: 1.44 (control) versus 1.05 (intervention); adjusted relative risk 0.72
- Hospitals differed in integration with computerized provider order entry, and results

Does Med Recon Improve Clinical Outcomes?

- Systematic review, January 2000 to March 2014
- Randomized and nonrandomized studies rating the severity of med discrepancies and med-related problems during med recon
- 83 articles
- Process improved: med recon helped to identify problems with meds
  - Unintentional med discrepancies: 3.4% to 98.2% of patients
  - Potential ADEs: 17.2% to 94.0% of patients
- Outcomes
  - Limited evidence that discrepancies caused harm
  - Little evidence of improvement in length of stay, readmission, and mortality

Key Lessons to Help You

- Review and develop policies carefully.
- Involve people from diverse, relevant services.
- Seek early feedback on current and new approaches.
- Be creative and adaptable.
- Do research without stalling the implementation.
- Identify a comparison group.
- Educate and train professionals and patients.
- Clarify roles: who will be involved, and how (including pharmacists, subspecialists, and nurses).
- Work closely with software developers and data managers.
- Improve the user interface.
- Integrate new approach into diverse workflows.
- Understand principles of performance improvement.
- Target and monitor process (compliance) and outcomes (impact), including communication with patients and providers.
- Get the patient involved in self-reporting medication history.
- Include the ambulatory setting.
- Provide value to both patients and clinicians!
Please submit your questions by using the Q&A box to the right of the screen.
CME/CNE Credits

To obtain CME or CNE credits:

Participants will earn 1.5 contact credit hours for their participation if they attended the entire Web conference.

Participants must complete an online evaluation in order to obtain a CE certificate.

A link to the online evaluation system will be sent to participants who attend the Web Conference within 48 hours after the event.