

The Perfect Patient Interview

Christopher Zaleski, PharmD.

Nebraska Medicine Retail/Specialty Pharmacy



Objectives

Discuss

Discuss the purpose and goals of a patient interview.

Describe

Describe the techniques and basic components of a patient interview.

Summarize

Summarize how a patient interview can be performed, including the dos and don'ts.



Actively listening (and communicating) to patients conveys respect for their self-knowledge and builds trust. It allows pharmacy technicians to assume the role of the trusted intermediary. It is only through shared knowledge that the pharmacy team and patients can co-create an authentic, viable care plan.

Rana L.A. Awdish, M. D. (n.d.). *The importance of making time to really listen to your patients*. American Association for Physician Leadership. Retrieved May 1, 2022, from <https://www.physicianleaders.org/news/the-importance-of-making-time-to-really-listen-to-your-patients#:~:text=Actively%20listening%20to%20patients%20conveys,an%20authentic%2C%20viable%20care%20plan>



PURPOSE AND GOALS OF THE PATIENT INTERVIEW



Purpose and Goals

The purpose of the patient interview is to gather important information about the patient's medication history.

Gathering this information allows the technician to assist the pharmacist in providing patient-centered care.



Purpose and Goals

- Goals
 - Review active medication list
 - Record accurate information for pharmacist review of care plan
 - Establish a trusting relationship with the patient

Patient interviews are the most common evaluation tool in ... medicine.



TECHNIQUES FOR A PERFECT PATIENT INTERVIEW



Verbal Qualities

Pace: speaking at the appropriate speed.

Tone: the way in which the patient is spoken to.

Volume: speaking at an appropriate volume to ensure the patient can hear without allowing other patients to hear.

Avoiding medical jargon

Maintaining a degree of professionalism

Asking the right questions



How do you ask questions in the interview?

The goal of the patient interview is to get the patient talking and keep them engaged.



Open-ended questions



Probing questions



Leading questions



Open-ended Questions

Questions that do not elicit a simple yes or no answer.

Closed-ended	Open-ended
Do you have allergies to medications?	What allergies to medications do you have?
Do you miss doses of your medications?	When is the last time you've missed a dose?
Is your date of birth xx/xx/xxxx?	What is your date of birth?
Do you have any questions for the pharmacist?	What questions do you have for the pharmacist?



Probing and Leading Questions

Probing questions ask for more detail or additional insight.

- Engages the patient to think about their response.
- "What do you think causes you to miss a dose?"

Leading questions prompt the patient to give a desired answer. These should be avoided when performing a patient interview.

- Often time closed-ended.
- May not elicit an accurate response.



Non-verbal Cues

Facial expression

Posture

Eye contact

Body language

Active listening





Active Listening

- Give the patient your full, undivided attention.
- Be sincerely interested in what the patient is saying.
- Be aware of your own feelings or opinions.
- Ask clarifying questions.
- Restate key points to verbalize understanding.

COMPONENTS OF THE PATIENT INTERVIEW



Preparation

01

Know the
patient

02

Know the
purpose

03

Know the
environment

*At no point during the interview shall the technician provide clinical guidance or answer questions beyond the scope of practice.



Know the patient

- Prior to the interview, review the patient profile:
 - What medications does the patient take?
 - What are the doses and frequencies?
 - What allergies does the patient have to medications?
 - What does their insurance coverage look like?



Know the purpose

Why is the interview being performed and what information will be gathered?



Know the environment

- The environment surrounding the interview is just as important as the interview itself.
 - Conduct the interview in a private area.
 - If conducting a telephone interview, ensure the conversation is private.
 - Ensure the area is quiet enough to dedicate full attention to the patient.
 - Ensure the interview area is free from distractions:
 - Phones ringing
 - Other patients or colleagues



Introduction

01

Introduce
yourself

02

Verify patient
information

03

Explain the
purpose of
the interview



Introduce yourself

The introduction helps set the overall tone of the interview. This is the technician's first opportunity to gain the patient's trust and make them feel comfortable.

Introduce yourself by stating your name and title.

"Hello, my name is Chris Zaleski and I am a certified pharmacy technician. Thank you for taking the time to meet with me today."



Verify patient information

It is critical to verify at least two patient identifiers before progressing forward in the interview. This ensures the correct patient information will be shared.

Examples of patient identifiers:

- Full name
- Date of birth
- Address
- Phone number
- Medical record number



Explain the purpose

This answers the question for the patient of why the interview being performed and what information will be gathered.

The patient may already know the purpose of the interview but restating the purpose gives the patient the expectation of what types of questions will be asked.



Example introduction

"Hello, my name is Chris Zaleski and I am a pharmacy technician with Nebraska Medicine. Before beginning the interview, please verify your name and date of birth. Today I will be conducting an interview to gather information regarding your current medication use. This information will help the pharmacist in making decisions about your care plan."



Body

01

Review
information to
be gathered

02

Current
prescription
medication use

03

Current over
the
counter/herbal
medication use



What
information
are we trying
to get from
the patient?

Drug allergies

Current medication use

Over the counter
medication use

Herbal medication use

Questions for the
pharmacist



Current prescription medication use

What medications is the patient currently taking?

Prescriptions:

- Review medication names, dosing, and usage
- Side effects
- Missed doses
- Avoid using drug abbreviations (ASA, APAP, etc.)
- Remember to ask open-ended questions



Current over the counter/herbal medication use

What over the counter or herbal medications does the patient take?

Things to consider:

- Over the counter and herbal medications include vitamins, supplements, and many other items that patients do not consider medications.
- Many over the counter and herbal medications can cause drug interactions or put the patient at increased risk of unwanted side effects.



Closing

01

Summarize
critical points

02

Review
questions for
the pharmacist

03

Next steps



Summarize critical points

Summarizing the critical points discussed ensures the accuracy of the information shared.

This is the technician's chance to clarify anything that may not have been clear during the interview.

This step is vital in delivering accurate information to the pharmacist.



Review outstanding
questions

*What questions do you
have for the pharmacist?*



What are the next steps?

Once the interview is complete, what happens next?

After summarizing critical points:

- Inform the patient that you will follow up with the pharmacist who will be available to answer their questions or if there are any additional questions or follow up.
- If the pharmacist is unavailable or is planning to reach out to the patient at a later time, be sure to verify accurate contact information.
- Thank the patient for their time.



PUTTING THE PIECES TOGETHER: HOW IS THE PERFECT PATIENT INTERVIEW PERFORMED?



Key concepts to remember

Follow appropriate structure for the interview:

- Preparation
- Introduction
- Body
- Closing

Actively listen to the patient to help build their trust.

Remember the overall purpose and goals of the interview.

Remember to summarize critical points to ensure accurate information for the pharmacist.



Summarizing the do's and don'ts

DO	DON'T
Properly prepare for the interview.	Show up unprepared and unorganized.
Ensure the environment is appropriate for the interview.	Conduct the interview in the presence of distractions.
Introduce yourself and explain the purpose of the interview.	Rush into the interview. The goal is to put the patient at ease.
Verify at least two patient identifiers.	Assume you're speaking to the correct patient.
Use appropriate pace, tone, and volume when speaking to the patient.	Rush through the interview or speak in a manner that puts patient privacy at risk.
Speak in a manner the patient can understand.	Use technical or medical jargon, including medication abbreviations.
Use appropriate non-verbal cues.	Appear distracted or uninterested.
Ask open-ended questions to keep the patient engaged.	Ask closed-ended questions that elicit a simple yes or no answer.
Ask about all medications, including over the counter and herbals.	Forget to verify over the counter and herbal medications.
Summarize critical information discussed.	Assume you have all the information without reviewing.
Ask what questions the patient has for the pharmacist.	Assume the patient has no questions.
Provide information within the scope of the technician practice.	Offer clinical guidance, counsel, or answer questions that require pharmacist intervention.

QUESTIONS?

