

Pharmacist Practice Assessment Criteria

The following chart outlines the practice criteria used by Community Practice Advisors (CPAs) when conducting an individual pharmacist assessment during a routine community pharmacy assessment. CPAs focus on four key areas (domains) taken from the [NAPRA Standards of Practice](#) that have been identified as having the greatest potential impact on patient and public safety. Through a combination of observation and retrospective review of documentation, CPAs evaluate the processes in place for each of these areas with respect to new prescriptions, refill prescriptions, adaptations/renewals/prescribing and comprehensive medication reviews.

For each key area (domain), specific performance indicators – which describe the **minimum practice requirements** for all pharmacists – are identified from the Standards of Practice. The guidance section illustrates how pharmacists would apply the standard in practice and provides examples of activities that support each standard. Pharmacists can use the guidance section to better understand and self-evaluate their current practice processes, procedures and behaviours to ensure they are meeting the required standard.

Domain: Patient Assessment	
PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Gathers relevant information through dialogue with the patient and/or their advocate ➤ Gathers relevant information through review of the patient profile ➤ Uses relevant information to identify drug therapy problems and/or issues that have the potential to affect the optimization of health outcomes (patient issues; patient specific needs) 	<p><u>New Prescriptions</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I gather relevant information through dialogue with the patient and/or review/create the patient profile to assess appropriateness of therapy. I determine/ask about allergies, medical conditions, lifestyle factors (e.g. smoking, diet, alcohol, exercise, etc.) and other relevant patient characteristics to assess any contraindications/precautions. <input type="checkbox"/> I determine/ask about other prescription medications, OTC medications or natural health products to assess any drug interactions. <input type="checkbox"/> I determine/ask about changes to patient's health status. <input type="checkbox"/> I determine/ask about or confirm indication(s) for medications. <input type="checkbox"/> I ensure appropriateness of the prescription for the patient including the correct indication, dose, dosage form, duration, no contraindications, no drug interactions etc. <input type="checkbox"/> I use relevant information to identify drug therapy problems and/or issues that have the potential to affect the optimization of health outcomes while considering patient specific needs/issues.

Domain: Patient Assessment (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Gathers relevant information through dialogue with the patient and/or their advocate ➤ Gathers relevant information through review of the patient profile ➤ Uses relevant information to identify drug therapy problems and/or issues that have the potential to affect the optimization of health outcomes (patient issues; patient specific needs) 	<p><u>Refill Prescriptions</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> As part of the therapeutic check, I review the patient profile to ensure ongoing appropriateness including identification of adherence/overuse issues with the medication being filled. <input type="checkbox"/> As part of the therapeutic check, I review the patient profile to ensure ongoing appropriateness including drug interactions between the medication being filled and other medications (Rx/OTC) on file. <input type="checkbox"/> As part of the therapeutic check, in addition to adherence/overuse issues and drug interactions, I review the patient profile to ensure ongoing appropriateness including identification of other issues related to the medication being filled (e.g. duplication, contraindications, newer therapy on file, missing adjunct medication, no longer indicated, etc.). <input type="checkbox"/> As part of the therapeutic check, I determine/consider the indication for the refill and ongoing need. <input type="checkbox"/> As part of the therapeutic check, I dialogue with the patient to gather further information regarding issues identified/flagged through patient profile review. <input type="checkbox"/> I use relevant information to identify drug therapy problems and/or issues that have the potential to affect the optimization of health outcomes while considering patient specific needs/issues. <p><i>Note: For refill prescriptions, best practice would be to have a process to communicate with every refill patient to determine if there are any changes or issues (e.g. effectiveness, adverse effects, new medical conditions/allergies, new medications, medications from other sources, etc.</i></p>

Domain: Patient Assessment (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
	<p><u>Adaptations, Renewals, Prescribing</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I identify and prioritize issues. <input type="checkbox"/> I identify options to optimize patient health outcomes. <input type="checkbox"/> I explain adaptation/renewal/prescribing to patients and obtain consent when required. <input type="checkbox"/> I gather information from the patient and/or the patient profile to assess the patient. <p><u>Comprehensive Medication Reviews</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I gather relevant information from patients. <ul style="list-style-type: none"> • Additional prescription, OTC, herbals, etc. • Changes to health status and allergies <input type="checkbox"/> I gather information from the patient and/or the patient profile to assess the patient. <ul style="list-style-type: none"> • I determine indication based on the medication profile and confirm with the patient • Any contraindications (e.g. allergies, medical conditions) • Any drug interactions <input type="checkbox"/> I identify and prioritize drug therapy problems or issues. <input type="checkbox"/> I identify options.

Domain: Decision Making	
PERFORMANCE INDICATOR(S)	GUIDANCE
	<p><u>New Prescriptions</u></p> <p><input type="checkbox"/> I use professional judgment to determine whether pharmacist intervention is required (e.g. adaptation, recommendation of alternate therapy to prescriber, prescribing additional therapy, OTC required or needs discontinuation or further discussion with patient, etc.).</p> <p><input type="checkbox"/> I use appropriate resources (e.g. references, collaboration with healthcare team, etc.) to determine therapeutic options.</p> <p><input type="checkbox"/> I identify options and select an appropriate option based on patient individual needs/issues, best practice and evidence where applicable.</p> <p><input type="checkbox"/> I implement decisions by adapting prescriptions, renewing prescriptions or providing recommendations to the prescriber or patient when appropriate.</p> <p><input type="checkbox"/> I collaborate with the healthcare team regarding decisions made/recommendations when appropriate.</p> <p><input type="checkbox"/> I provide follow up and monitoring when appropriate.</p> <p><u>Refill Prescriptions</u></p> <p><input type="checkbox"/> Based on my assessment of each refill prescription, I use professional judgment to determine whether pharmacist intervention is required (e.g. adaptation, recommendation of alternate therapy to prescriber, prescribing additional therapy, OTC required or needs discontinuation or further discussion with patient, etc.).</p> <p><input type="checkbox"/> I identify options and select an appropriate option based on patient individual needs/issues, best practice and evidence where applicable.</p> <p><input type="checkbox"/> I implement decisions by renewing prescriptions or providing recommendations to the prescriber or patient when appropriate</p>

Domain: Decision Making (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
	<p><u>Refill Prescriptions (continued)</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I use appropriate resources (e.g. references, collaboration with healthcare team, etc.) to determine therapeutic options. <input type="checkbox"/> I collaborate with the healthcare team regarding decisions made/recommendations when appropriate. <input type="checkbox"/> I provide follow up and monitoring when appropriate. <p><u>Adaptations, Renewals, Prescribing</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I use professional judgment to determine whether pharmacist intervention is required (e.g. adaptation, renewal, recommendation of alternate therapy to prescriber, prescribing additional therapy, OTC required or needs discontinuation, further discussion with patient, etc.). <input type="checkbox"/> For adaptations and prescribing, I explain the process to the patient and obtain consent when required. <input type="checkbox"/> I use appropriate resources (references, collaboration with healthcare team) to determine therapeutic options. <input type="checkbox"/> I identify options and select an appropriate option based on patient individual needs/issues, best practice and evidence where applicable. <input type="checkbox"/> I implement decisions by adapting prescriptions, renewing prescriptions or providing recommendations to the prescriber or patient when appropriate. <input type="checkbox"/> I collaborate with healthcare team regarding decisions made/recommendations when appropriate. <input type="checkbox"/> I provide follow up and monitoring when appropriate.

Domain: Decision Making (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Makes decisions to optimize patient outcome ➤ Implements decision ➤ Monitors outcome of decision to ensure it continues to be best option for patient 	<p><u>Comprehensive Medication Reviews</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I use professional judgment to determine whether pharmacist intervention is required (e.g. adaptation, renewal, recommendation of alternate therapy to prescriber, prescribing additional therapy, OTC required or needs discontinuation, further discussion with patient, etc.). <input type="checkbox"/> I use appropriate resources (references, collaboration with healthcare team) to determine therapeutic options. <input type="checkbox"/> I identify options and select an appropriate option based on patient individual needs/issues, best practice and evidence where applicable. <input type="checkbox"/> I implement decisions by adapting prescriptions, renewing prescriptions or providing recommendations to the prescriber or patient when appropriate. <input type="checkbox"/> I collaborate with the healthcare team regarding decisions made/recommendations when appropriate. <input type="checkbox"/> I provide follow up and monitoring when appropriate.

Domain: Documentation	
PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Documents information gathered in patient profile ➤ Documents decisions made, rationale and follow up ➤ Documents communication with patients/healthcare team 	<p><u>New Prescriptions</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I document relevant patient information in the patient record, including information gathered from the patient such as allergies, medical conditions, medications, changes in health and monitoring information (e.g. blood pressure, A1C, pain control, etc.). <input type="checkbox"/> I document indication where relevant to facilitate monitoring and future assessment and continuity of care. <input type="checkbox"/> I document communication with the patient and healthcare team where appropriate. <input type="checkbox"/> I ensure that information needed for continuity of care is documented in a manner that is timely, readily retrievable and easily accessible by other pharmacy team members (i.e. documentation is completed and saved in a standardized fashion like a “patient chart” – patient specific and not only transaction specific). <input type="checkbox"/> The information I document is accurate, complete and appropriate. <p><u>Refill Prescriptions</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I follow up on issues previously identified in the patient’s profile. <input type="checkbox"/> I document relevant information in the patient’s record as required, including: <ul style="list-style-type: none"> • Issues identified • Decisions made • Rationale for decisions • Follow up provided • Communication with patients/healthcare professionals <input type="checkbox"/> I document if further follow up is required.

Domain: Documentation (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Documents information gathered in patient profile ➤ Documents decisions made, rationale and follow up ➤ Documents communication with patients/healthcare team 	<p><u>Adaptations, Renewals, Prescribing</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I document relevant patient information in the patient record, including information gathered from the patient such as allergies, medical conditions, medications, changes in health and monitoring information (e.g. blood pressure, A1C, pain control, etc.). <input type="checkbox"/> I document indication where relevant to facilitate monitoring and future assessment and continuity of care. <input type="checkbox"/> I document relevant information for adaptations, including consent, issues identified, decisions made, rationale and follow up. <input type="checkbox"/> I document relevant information for renewals, including consent, patient assessment, decisions made and rationale. <input type="checkbox"/> I document communication with the patient and healthcare team where appropriate. <input type="checkbox"/> I ensure that information needed for continuity of care is documented in a manner that is timely, readily retrievable and easily accessible by other pharmacy team members (i.e. documentation is completed and saved in a standardized fashion like a “patient chart” – patient specific and not only transaction specific). <input type="checkbox"/> The information I document is accurate, complete and appropriate.

Domain: Documentation (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Documents information gathered in patient profile ➤ Documents decisions made, rationale and follow up ➤ Documents communication with patients/ healthcare team 	<p><u>Comprehensive Medication Reviews</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I document relevant patient information in the patient record, including information gathered from the patient such as allergies, medical conditions, medications, changes in health and monitoring information (e.g. blood pressure, A1C, pain control, etc.). <input type="checkbox"/> I document indication where relevant to facilitate monitoring and future assessment and continuity of care. <input type="checkbox"/> I document relevant information for comprehensive medication reviews, including consent, issues identified, decisions made, rationale and follow up. <input type="checkbox"/> I document communication with the patient and healthcare team where appropriate. <input type="checkbox"/> I ensure that information needed for continuity of care is documented in a manner that is timely, readily retrievable and easily accessible by other pharmacy team members (i.e. documentation is completed and saved in a standardized fashion like a “patient chart” – patient specific and not only transaction specific). <input type="checkbox"/> The information I document is accurate, complete and appropriate.

Domain: Communication & Education

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Communicates verbally in a manner that is appropriate for the audience ➤ Communicates in writing in a manner appropriate for the audience ➤ Provides information to audience within scope ➤ Ensures audience understanding 	<p><u>New Prescriptions</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I communicate in a manner that promotes audience understanding (e.g. fluency, grammar, vocabulary, tone, volume and modulation of voice, rate of speech, pronunciation and appropriate level of complexity). <input type="checkbox"/> I use an effective questioning style (e.g. open-ended questions). <input type="checkbox"/> I use active listening skills (e.g. to identify patient needs). <input type="checkbox"/> I engage my audience (e.g. eye contact, gesture, posture, use of silence, etc.). <input type="checkbox"/> I respond to feelings and needs (e.g. empathy). <input type="checkbox"/> My communication is logically organized, focused and coherent (e.g. sequence of questions, avoid confusing the audience). <input type="checkbox"/> I ensure my written communication for healthcare professionals is relevant, professional and organized. <input type="checkbox"/> I ensure written communication for patients is relevant, professional and organized. <input type="checkbox"/> I provide complete and appropriate patient education. <input type="checkbox"/> I communicate with prescribers when needed. <input type="checkbox"/> I use open-ended questions to assess prior knowledge of patient and/or patient understanding. <input type="checkbox"/> I use an interactive approach (e.g. a dialogue vs. a monologue). <input type="checkbox"/> I determine patient understanding through questioning and non-verbal feedback.

Domain: Communication & Education (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Communicates verbally in a manner that is appropriate for the audience ➤ Communicates in writing in a manner appropriate for the audience ➤ Provides information to audience within scope ➤ Ensures audience understanding 	<p><u>Refill Prescriptions</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I communicate in a manner that promotes audience understanding (e.g. fluency, grammar, vocabulary, tone, volume and modulation of voice, rate of speech, pronunciation and appropriate level of complexity). <input type="checkbox"/> I use an effective questioning style (e.g. open-ended questions). <input type="checkbox"/> I use active listening skills (e.g. to identify patient needs). <input type="checkbox"/> I engage my audience (e.g. eye contact, gesture, posture, use of silence, etc.). <input type="checkbox"/> I respond to feelings and needs (e.g. empathy). <input type="checkbox"/> My communication is logically organized, focused and coherent (e.g. sequence of questions, avoid confusing the audience). <input type="checkbox"/> I ensure my written communication for healthcare professionals is relevant, professional and organized. <input type="checkbox"/> I ensure written communication for patients is relevant, professional and organized. <input type="checkbox"/> I provide complete and appropriate patient education. <input type="checkbox"/> I communicate with prescribers when needed. <input type="checkbox"/> I use open-ended questions to assess prior knowledge of patient and/or patient understanding. <input type="checkbox"/> I use an interactive approach (e.g. a dialogue vs. a monologue). <input type="checkbox"/> I determine patient understanding through questioning and non-verbal from patients and/or their advocates.

Domain: Communication & Education (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Communicates verbally in a manner that is appropriate for the audience ➤ Communicates in writing in a manner appropriate for the audience ➤ Provides information to audience within scope ➤ Ensures audience understanding 	<p><u>Adaptations, Renewals, Prescribing</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I communicate in a manner that promotes audience understanding (e.g. fluency, grammar, vocabulary, tone, volume and modulation of voice, rate of speech, pronunciation and appropriate level of complexity). <input type="checkbox"/> I use an effective questioning style (e.g. open-ended questions). <input type="checkbox"/> I use active listening skills (e.g. to identify patient needs). <input type="checkbox"/> I engage my audience (e.g. eye contact, gesture, posture, use of silence, etc.). <input type="checkbox"/> I respond to feelings and needs (e.g. empathy). <input type="checkbox"/> My communication is logically organized, focused and coherent (e.g. sequence of questions, avoid confusing the audience). <input type="checkbox"/> I ensure my written communication for healthcare professionals is relevant, professional and organized. <input type="checkbox"/> I ensure written communication for patients is relevant, professional and organized. <input type="checkbox"/> I provide complete and appropriate patient education. <input type="checkbox"/> I communicate with the patient regarding adaptations and renewals. <input type="checkbox"/> I communicate with prescribers when needed. <input type="checkbox"/> I use open-ended questions to assess prior knowledge of patient and/or patient understanding. <input type="checkbox"/> I use an interactive approach (e.g. a dialogue vs. a monologue). <input type="checkbox"/> I determine patient understanding through questioning and non-verbal feedback.

Domain: Communication & Education (continued)

PERFORMANCE INDICATOR(S)	GUIDANCE
<ul style="list-style-type: none"> ➤ Communicates verbally in a manner that is appropriate for the audience ➤ Communicates in writing in a manner appropriate for the audience ➤ Provides information to audience within scope ➤ Ensures audience understanding 	<p><u>Comprehensive Medication Reviews</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> I communicate in a manner that promotes audience understanding (e.g. fluency, grammar, vocabulary, tone, volume and modulation of voice, rate of speech, pronunciation and appropriate level of complexity). <input type="checkbox"/> I use an effective questioning style (e.g. open-ended questions). <input type="checkbox"/> I use active listening skills (e.g. to identify patient needs). <input type="checkbox"/> I engage my audience (e.g. eye contact, gesture, posture, use of silence, etc.). <input type="checkbox"/> I respond to feelings and needs (e.g. empathy). <input type="checkbox"/> My communication is logically organized, focused and coherent (e.g. sequence of questions, avoid confusing the audience). <input type="checkbox"/> I ensure my written communication for healthcare professionals is relevant, professional and organized. <input type="checkbox"/> I ensure written communication for patients is relevant, professional and organized. <input type="checkbox"/> I provide complete and appropriate patient education. <input type="checkbox"/> I communicate with prescribers when needed. <input type="checkbox"/> I use open-ended questions to assess prior knowledge of patient and/or patient understanding. <input type="checkbox"/> I use an interactive approach (e.g. a dialogue vs. a monologue). <input type="checkbox"/> I determine patient understanding through questioning and non-verbal feedback.

Pharmacist Member Assessment



Tips and Tools for Patient Assessment

I

Is therapy **indicated**?

Understand the indication and if it is still valid (for example, has anything changed with his health status? Was the medication meant for short term use?)

E

Is therapy **effective**?

Understand if the goals of the therapy are being met (for example, are the medications supporting changes in blood sugar?)

S

Is therapy **safe**?

Understand if there are changes in medications or conditions, if monitoring is needed (e.g. blood work), if there are potentially other untreated conditions or if additional therapies could be instituted.

U

Is the patient willing to **use/adhere** to therapy?

Understand the patient's compliance with the drug regimen and schedule.

https://abpharmacy.ca/sites/default/files/ccctoolcard_web.pdf?redirect

Patient Assessment Pearls:

<https://abpharmacy.ca/sites/default/files/VitalToCCC.pdf>

CONNECT WITH PATIENTS

Engaging with patients at every encounter can create an opportunity for patients to collaborate in their care.

CONFIRM AND DOCUMENT INDICATION

Confirming the indication can support your patients and their assessment and monitoring.

Don't make assumptions. If you or the patient are not sure about the indication, seek clarification from the prescriber or other sources.

Document the indication electronically to facilitate monitoring and future assessments.

Tips:

- Find the best location to document patient information in your software.
- Write the indication on the prescription prior to scanning.

MONITOR PATIENTS

Reconnecting with patients can help you find out how their medications are working and what you can do to continue supporting them.

For every prescription that is dispensed, pharmacists must ask whether the prescription is therapeutically appropriate

Tip: use IESU process to ask yourself if you are making any assumptions

This includes gathering relevant information through dialogue with the patient, and creating, adjusting or reviewing the patient profile. Note that patient profiles need to be maintained; a patient's health is not static and their profile should be reviewed on a regular basis.