Developing a Patient Database
• Setting the stage for developing a patient database
• Elements of the patient database
• The interview
  • Preparing your student
  • Reviewing the database
• Feedback and evaluation of your student
• Overview of preceptor role
• An example: my practice
1. Evaluate and identify how you gather information to create a patient database in your patient care practice

- What is your practice environment?
- Who are your team members, if any?
- What is the nature of your patient interactions which informs the data collection process?
  - Complete assessments
  - Focused assessments – e.g. drug selection, disease specific (CDM), med history and reconciliation, allergy assessment, adherence assessment, combination
- Time allotment for a typical patient interaction
  - Prioritization
2. Get to know your student; specifically, their comfort and experience with gathering information
   • How many patient interviews has your student conducted?
   • What types of patients has your student had exposure to for creating a database?

3. Share your approach with your student
   • Do you use a patient database form?
   • What information can be gathered prior to a patient interview? How do you access this information?
   • What are the common disease states covered?
## Elements in a Database

### MEDICAL HISTORY
- Demographics
- Chief Complaint/Reason for Assessment
- History of Present Illness (HPI)
- Past Medical History (PMH)
- Medication History*
- Family History
- Functional History
- Social History
- Review of Systems (ROS)
- Physical Exam/Vital Signs
- Lab/Diagnostic Tests

### MEDICATION HISTORY
- Allergies
- Adverse Effects
- Current Medications
- Past Medications
- Non-prescription Medications
- Other Medications
- Immunization History
- Medication Experience
- Medication Adherence
- Medication “Management” or Organization
The Interview: Preparing Your Student

- Location/environment (maintaining patient confidentiality)
- Framing the interview expectations (purpose of interview)
- Review timelines for interview (determine appropriateness with patient)
- Direct versus indirect supervision
The Interview: Preparing Your Student

- Review pre-gathered information
- Sharing known patient goals
- Discuss questioning technique
  - Anticipated issues with communication
  - Types of questions (open- vs closed-ended vs probing)
- Interview Closure
  - Review next steps and how follow-up will occur

PRECEPTING TIP:
Share strategies that you use for effective data gathering.
• Reviewing the database with your student
  • Before or after the patient leaves?
  • Is the information gathered complete? Will it allow for assessment of drug therapy?

• Strategy for gathering missed information
  • What is needed, and how will it be gathered?
  • Patient, medical chart, Netcare, community pharmacy, MD, allied healthcare providers, other
1. Provide the following feedback to your student:
   - His/her data collection strategy - appropriateness, quality and efficiency

2. Evaluate your student on the following criteria:
   - **Appropriateness** of information collected
     - Is too much/too little information collected?
     - Did your student focus the interview properly?
     - Did your student exhibit professional behaviour?
   - **Quality and accuracy** of information collected
     - Did your student collect sufficient details within each area?
   - **Efficiency** for gathering information
     - Did your student utilize time appropriately?

**Note:** If student is unable to appropriately gather information despite feedback and sufficient practice, please contact the course coordinator.
Overview of Preceptor Role

Before the clinical placement

- Inform student about the types of patients they will be routinely seeing in your practice and what preparation will help them in creating a patient database

Early in the clinical placement

- Discuss with the student your expectations for creating an appropriate patient database in your practice
- Review initial databases thoroughly with the student to determine strengths and areas for improvement

Later in clinical placement

- Allow for more independent work as appropriate
Precepting and the database in my practice

- Ambulatory stroke prevention clinic
- Engage students in selecting database
- Allow time for students to create database
- Allow some independence, but with review of database once complete
- Provide feedback on appropriateness, quality and efficiency of database creation
- Review process with them at midpoint