

Jim Doyle
Governor



1 WEST WILSON STREET
P O BOX 2969
MADISON WI 53701-2969

Karen E. Timberlake
Secretary

State of Wisconsin
Department of Health Services

Telephone: 608-266-8481
FAX: 608-267-0352
TTY: 888-241-9432
dhs.wisconsin.gov

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To: Adult Family Homes AFH 13
Community Based Residential Facilities CBRF 13
Residential Care Apartment Complexes RCAC 12
Adult Day Care Centers ADC 05

From: Kevin Coughlin, Director
Bureau of Assisted Living

Via: Otis Woods, Administrator
Division of Quality Assurance

**Summary of Wisconsin's Assisted Living Medication Management Initiative
Workgroup Activities and Introduction of the Assisted Living Medication
Management Initiative Website ([LINK](#))**

The purpose of this memo is to report on the outcome of the Medication Management Workgroup Initiative workgroup's endeavor and introduce the Assisted Living Medication Management Information Website, which is the product of the initiative.

In recent years, there has been an increase in the number of higher-acuity residents living in assisted living facilities in Wisconsin, prompting a need for more sophisticated medication management in these facilities. Additionally, there has been concern about the occurrence of medication errors and the adequacy of medication administration and monitoring in assisted living facilities. Although medications can improve the functional status and quality of life for residents, improperly managed medications can also cause serious adverse consequences.

In a proactive response to address these concerns, the Division of Quality Assurance's Bureau of Assisted Living formed the Assisted Living Medication Management Initiative Workgroup in March of 2007 and consists of the Assisted Living Regional Directors from each of the Bureau's five regional offices. The primary focus of the workgroup was to provide information, guidance, recommendations, and resources for assisted living providers in all aspects of medication management and administration.

The workgroup established the following goals:

1. Reduce medication errors in assisted living facilities
2. Improve medication management systems in assisted living facilities

3. Provide guidance to assisted living providers in improving communication with practitioners regarding medications
4. Promote the use of accepted standards of practice related to medication dosages, interactions, side effects, and lab values
5. Establish a website with information and resources related to medication management
6. Examine the RN role in medication management in assisted living
7. Identify training needs and resources
8. Develop sample forms/tools for assisted living providers for pharmacy review, communication, medication administration record, etc.
9. Provide information and resources about the safe use of psychotropic medications, including PRN usage, benefits/risks, and side effects

The workgroup researched various aspects of medication administration in Wisconsin's assisted living facilities to determine website content. Information sources included:

1. Completion of a detailed survey by all Bureau of Assisted Living surveyors. The survey included questions related to medication errors, medication storage and disposal, physician orders, controlled substances, psychotropic medications, medication administration, documentation, RN delegation, self-administration, medication interactions, medication side effects, monitoring of lab values and therapeutic blood levels, and the use of multiple medications in the same drug classification. Surveyors were asked for examples of medication errors they had encountered, including the factors that contributed to the error, and for suggestions about ways that DQA can assist the assisted living industry in reducing medication errors, improve medication management, and resolve medication related issues.
2. Assisted living surveys entered in the Automated Survey Processing Environment (ASPEN) from January 2005 to March 2007 were searched for any citations related to medication errors, medication management, and medication administration. Citations were reviewed to identify common causes of medication errors and the outcome to residents and to determine possible contributing factors.
3. "Mistake-Proofing the Design of Health Care Processes," a document produced by the Agency for Healthcare Research and Quality (AHRQ), was reviewed by the workgroup as a potential resource for assisted living providers in the reduction of medication errors.
4. The Medication Management Topic Group Recommendation Adopted by Two-Thirds Majority of the Assisted Living Workgroup Report to the U.S. Senate Special Committee on Aging (2003) was reviewed by the workgroup for recommendations that related to workgroup goals and also as a resource for assisted living providers.

We are pleased to announce that the Assisted Living Medication Management Initiative website is now available with links to multiple topics and resources related to medication

management. It is our intent that this website will serve as a “living document” to which information can be added on an on-going basis. We encourage you to view the content of this website at http://dhs.wisconsin.gov/rl_dsl/MedManagement/asstlvgMMI.htm. If you would like to submit materials for possible inclusion on the website, please contact the Assisted Living Regional Director in your region.

The website is designed to provide information related to many aspects of medication management and includes links to all previously issued BQA/OQA/DQA memos related to medication management in assisted living facilities. The topics included on the website are:

- Communication & Reporting
- Controlled Substances
- Documentation
- Insulin Administration
- Medical Abbreviations
- Medication Errors (including a definition developed by the workgroup)
- Medication Monitoring
- Medication Storage & Disposal
- PRN Medications
- Packaging & Labeling
- Policy/Procedure Development & Quality Assurance
- Psychotropic Medications
- Role of the Pharmacist
- Role of the RN & RN Delegation
- Self-Administration
- Staff Training

Each of these topics link to additional information/resources related to the specific topic. There will be a general discussion for some of the topics, with links to related BQA/OQA/DQA memos and other resources, relevant regulations for each provider type, and sample forms or tools, if available.

We are hopeful that this initiative will support the improvement of medication delivery systems in assisted living facilities in Wisconsin. Thank you for your commitment to the health and safety of Wisconsin’s assisted living consumers.

If you have questions/comments about the website or wish to submit materials for inclusion on the website, please contact the Assisted Living Regional Director in your region. http://dhs.wisconsin.gov/rl_DSL/Contacts/ALSreglmap.htm