

Patient Educator Checklist

Pre-Patient Encounter

- ☐ Receive report from provider while filling out **Patient Handoff Checklist**
- ☐ Review patient chart

Medication Review & Education

- ☐ Provide education on newly prescribed medications
 - ☐ Name of medication, when to take it, how to take it, common side effects, things they might need to check if they're taking this medication
- ☐ Confirm medication list (in chart) is up to date with the patient
- ☐ Ask if patient needs financial assistance for: (can use script provided if needed)
 - ☐ Medications
 - ☐ If YES have patient complete **Coverage Form**
 - ☐ Write patient's name and coverage amount on the **Pharmacy Coverage Tracker Form (Half-Sheet)**
- ☐ Confirm if returning patient has brought back diabetes/BP logs and review

Lifestyle & Monitoring Education

- ☐ Provide education on recommended lifestyle modifications (in Handoff Checklist)
- ☐ Provide patient with related hand outs and folders (on back wall organizer) regarding their condition or chief complaint, if they do not have already
 - ☐ Go through each diagnosis that the patient was given and explain how lifestyle + medications can help manage it
 - ☐ Educate patient on what normal/goal values for BP/sugar are
- ☐ Ask if patient has proper health monitoring equipment (e.g., BP machine, glucose monitor)
 - ☐ If supplies or OTC are needed, escort patient to supply cabinet

Insurance / Assistance Screening (MAP)

- ☐ If patient needs to check MAP qualification, scan QR code for **Health Insurance Coverage Survey**
 - ☐ Follow all prompts and ask patient each listed question
 - ☐ **DO NOT submit the survey**
 - ☐ Provide patient with insurance handouts (e.g. MAP) and resources

Social Services Screening

- ☐ Dental/food insecurity/mental health/other resource needs

Documentation & Charting

- ☐ Make copies of completed **Prescription Cards**
- ☐ Place copies of **Coverage Form, Prescription Cards, and Handoff Checklist** in patient chart
- ☐ Give patient the **Health Passport Sheet, Coverage Form, and Prescription Cards**
- ☐ When finished, record time education was finished
- ☐ Ensure each page in the chart has a patient sticker
- ☐ Take patient and completed patient chart to front desk
 - ☐ Encourage patients to check out table/bulletin boards showing what products we have for them to take home for free!