This job aid provides guidance on answering M2020 (Management of Oral Medications) accurately for patients living in Assisted Living Facilities (ALF) or other situations where medications are routinely stored in a secure location for the protection of others.

Background

M2020 is intended to identify the patient’s ability to take all oral (p.o.) medications reliably and safely at all times. The intent of the item is to identify the patient's ABILITY, not necessarily actual performance. "Willingness" and "compliance" are not the focus of these items. This OASIS item addresses the patient's ability to safely take oral medications, given the current physical and mental/emotional/cognitive status, activities permitted, and environment. The patient must be viewed from a holistic perspective in assessing ability to perform medication management.

Ability can be temporarily or permanently limited by:
- physical impairments (e.g., limited manual dexterity)
- emotional/cognitive/behavioral impairments (e.g., memory deficits, impaired judgment, fear)
- sensory impairments, (e.g., impaired vision, pain)
- environmental barriers (e.g., access to kitchen or medication storage area, stairs, narrow doorways)

Purpose

A review of past performance in OBQI Imp in Oral Medications reveals that some assessing clinicians may not understand that M2020 is based on an assessment of ability rather than actual performance. When branches care for many ALF patients, their OBQI Oral Med Mgt scores may be negatively impacted by this misunderstanding when scoring ALF patients who are capable of managing their oral medications but are not currently do it. The fact that we are trying to improve patient's ability to manage medications as part of our performance improvement plan needs to be communicated clearly to the ALF leadership team and aligned with their goals in order for our efforts to be successful.

Answering M2020 accurately for patients living in an ALF requires a different strategy than used on other patients. We know that many ALF patients are simply too confused and dependent on others to have much potential for improvement in their ability to manage oral medications. They are admitted and are discharged with M2020="3" - Unable to take medication unless administered by another person. For others, however, there may be opportunities for improvement in M2020.

Utilization

Typically, we assess medication knowledge and ability while the patient has all of their medication bottles at hand and they can refer to them during our assessment. That is often not an option for the ALF patient so we use a different approach to assess patient understanding described below. The following questions should be used to assess patient ability and to create goals for improvement, when appropriate.

Questions to ask the ALF staff (Our Sales and Ops team should ask these questions when building the relationship with the ALF team):

1. “What options are available for residents for medication management?” This should be something that is clearly communicated when we establish the relationship with the ALF team and must be understood by our admitting clinicians. This will also help us when shaping the goals for improving oral med management in appropriate patients.
2. “Which of the options for medication management is being used by this resident?” This should be communicated to us at the time of referral. For patients with an opportunity for improvement in M2020, it is important to communicate to the ALF staff our plans and interventions toward improving
patient understanding of their oral medications. This ensures our efforts are coordinated and that we all share the same goals for the patient.

3. **“What medications is this resident currently taking, according to your records?”** This is usually communicated from the ALF at the time of referral. If not available at that time, the assessing clinician can ask for a copy at admission to our services.

Questions to ask the ALF patient:
(Remember the medications are kept in the medication room or secure cart in the ALF however this does not mean that all patients are dependent in their ability to take their meds):

“Does the ALF staff bring your medicines to your bedside or do you go down to the nursing station for them?”
“How many pills do you take?” (and) “Do you know what each of them is for?”
“Does the ALF staff stay while you take all of your medications and watch you take them?”
“How do you remember that it is time for your medications?”
“Would you be able to tell if they missed giving you your medications one time?”

- Answers to the following OASIS questions should be used to guide our assessment of patient ability:
  - (M1700) Cognitive Functioning
  - (M1242) Frequency of Pain Interfering with Activity
  - (M1200) Vision
  - (M1810) Current Ability to Dress Upper Body
  - (M1860) Ambulation/Locomotion
M2020 Accuracy in Patients in Assisted Living Facilities

Decision Tree

Answering M2020 Oral Med Mgt for patients in congregate living facilities

Conduct your assessment and consider:
- M1200 vision,
- M1242 pain,
- M1810 upper body dressing,
- M1700 cognitive functioning

Ask the patient:
“Does the ALF staff bring your medicines to your bedside or do you go down to the nursing station for them?”
“How many pills do you take?”
“Do you know what each of them is for?”
“Does the ALF staff stay while you take all of your medications and watch you take them?”
“How do you remember that it is time for your medications?”
“Would you be able to tell if they missed giving you your medications one time?”

Answer M2020

Does the patient have the ability to independently take the correct oral medications and proper doses at the correct times? 

Yes \[ M2020 = 0 \]

No

Does the patient have the ability to take oral medications at the correct times if doses are prepared in advance by another person (OR) if another person develops a drug diary or chart?

Yes \[ M2020 = 1 \]

No

Does the patient have the ability to take medications at the right times if given reminders to take medications at the appropriate times?

Yes \[ M2020 = 2 \]

No

Patient is unable to take oral medications unless administered by another person

\[ M2020 = 3 \]
**Question and Answer**

Question: A patient is typically independent in managing her own oral medications. At the time of assessment, the patient is in an ALF and the medications have been placed out of reach for safety. This now requires someone to assist the patient to retrieve the medications. How should M2020 be answered?

Answer: M2020 assesses the patient's ability to prepare and take oral medications reliably and safely. Preparation includes ability to read the label (correct medication), open the container, select the pill/tablet or milliliters of liquid (correct dosage), and orally ingest at the prescribed time (take). In some cases, a patient lives in an environment where the facility or caregiver may impose a barrier that limits the patient's ability to access or prepare their medications, e.g. an Assisted Living Facility that keeps all medications in a medication room or a family that keeps the medications out of the reach of children for the child's safety - not the patient's.

In these cases, the clinician will assess the patient's vision, strength and manual dexterity in the hands and fingers, as well as their cognitive status to determine the patient's ability to prepare and take their oral medications despite access barriers imposed by family or facility caregivers.

**Examples**

**Scenario #1**

A 78 year old patient had a hospital admission last week for a fever related to cellulitis of the leg and was transferred back to the ALF yesterday.

- You check your information and see that in this ALF, all medications are stored in a secure cart and are either brought to the patient on schedule or when the patient requests them (when consistent with physician orders); PRN medications are brought to the patient as needed, based on patient request or symptoms noted during observation by the nurse.
- The ALF medication record shows six medications in the morning and one in the evening.

During your comprehensive assessment, you ask the patient about medications. The patient takes out a medication list he keeps in his drawer and states,

- “I take six medications every morning and one at bedtime.”
- “I call the nurse to bring me my medications in the morning before breakfast. At night, I call the nurse for my pill after I brush my teeth and get ready for bed. Sometimes I do have a little trouble remembering when to take my medications.”

Other information,

- You confirm with the nurse that this patient does not consistently remember to call for his medications in the morning and evening.
As you assess vision (for M1200), upper body dressing (for M1810) and cognitive functioning (for M1700) you determine that the patient does not need help to prepare individual doses or to create a drug chart.

How would you answer M2020?

(M2020) Management of Oral Medications: Patient's current ability to prepare and take all oral medications reliably and safely, including administration of the correct dosage at the appropriate times/interval.

0 - Able to independently take the correct oral medication(s) and proper dosage(s) at the correct times

1 - Able to take medication(s) at the correct times if:
   (a) individual dosages are prepared in advance by another person; OR
   (b) another person develops a drug diary or chart.

2 - Able to take medication(s) at the correct times if given reminders by another person at the appropriate times

3 - Unable to take medication unless administered by another person

NA - No oral medications prescribed.

Scenario #2
An 82 year old patient living in an ALF referred from a doctor’s office with new UTI and dehydration.

- You check your information and see that in this ALF, all medications are stored in a secure cart and are either brought to the patient on schedule or when the patient requests them (when consistent with physician orders).
- Usually you receive a copy of the ALF medication record with the referral. It wasn’t available with the referral this time, however, so you request a copy of the patient’s ALF medication record from the ALF nurse when you arrive at the facility. The ALF medication record shows three medications in the morning and one in the evening.

The patient states,
- “I take whatever the nurse brings to me.”

Other information,
- You confirm with the nurse that this patient never calls for her medications.
- As you assess vision (for M1200), upper body dressing (for M1810) and cognitive functioning (for M1700) you determine that the patient would be unable to take her medications unless administered by another person.
- Ask open ended questions to help assess cognitive functions related to oral medication management:
  - “Does the ALF staff bring your medicines to your bedside or do you go down to the nursing station for them?”
o “How many pills do you take?” (and) “Do you know what each of them is for?”
o “Does the ALF staff stay while you take all of your medications and watch you take them?”
o “How do you remember that it is time for your medications?”
o “Would you be able to tell if they missed giving you your medications one time?”

How would you answer M2020?

(M2020) Management of Oral Medications: Patient’s current ability to prepare and take all oral medications reliably and safely, including administration of the correct dosage at the appropriate times/interval.

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    (a) individual dosages are prepared in advance by another person; OR
    (b) another person develops a drug diary or chart.
___ 2 - Able to take medication(s) at the correct times if given reminders by another person at the appropriate times
___X 3 - Unable to take medication unless administered by another person
___NA - No oral medications prescribed.

Scenario #3
A 67 year old patient had a hospital admission last week for a fever related COPD and HF and was transferred back to the ALF yesterday.

• You check your information and see that in this ALF, all medications are stored in a secure medication room and are either brought to the patient on schedule or the patient comes down to the medication room when they are ready for their medications.

• The ALF medication record shows this patient takes seven medications in the morning and three in the evening.

During your comprehensive assessment, you ask the patient about medications. The patient takes out a medication list he keeps in his drawer and states,

• “I take seven medications every morning and three in the evening.”
• “I have an <M> next to pills that I take in the morning and an <E> next to the ones I take in the evening.”
• “I go down to the medication room in the morning before I have breakfast and in the evening before I wash up for bed. That way I always remember to take my medications.”

Other information,

• You confirm with the nurse that this patient consistently remembers to come ask for his medications in the morning and evening.
• As you assess vision (for M1200), upper body dressing (for M1810) and cognitive functioning (for M1700) you determine that the patient would not need help to prepare individual doses or to create a drug chart.

How would you answer M2020?

(M2020) Management of Oral Medications: Patient's current ability to prepare and take all oral medications reliably and safely, including administration of the correct dosage at the appropriate times/interval.

- X _ 0 - Able to independently take the correct oral medication(s) and proper dosage(s) at the correct times
- ___ 1 - Able to take medication(s) at the correct times if:
  - (a) individual dosages are prepared in advance by another person; OR
  - (b) another person develops a drug diary or chart.
- ___ 2 - Able to take medication(s) at the correct times if given reminders by another person at the appropriate times
- ___ 3 - Unable to take medication unless administered by another person
- ___ NA - No oral medications prescribed.