

Medication Reconciliation Data Collection Flow Chart

Step 1: Identify Patients to Include in the Sample (Survey Coordinator)

Randomly Select Patients

Use the Medication Reconciliation Workbook instructions to randomly sample patients from the admission list. Sample patients from different days of the week, including weekends.

- Exclude patients <18 years old
- Exclude patients discharged or expired before Gold Standard Medication History
- Exclude patients without discharge orders

Obtain Patient Admission List

On the data collection day, obtain a list of patients admitted the previous day to eligible units, in order of admission

- Medical
- Medical/Surgical
- Step-down/Progressive

Coordinate with Pharmacy Staff

Send the sampled patient list to a pharmacist, pharmacy resident, or pharmacy technician to schedule interviews (in-person, video, or phone) to obtain the Gold Standard Medication History.

*Please note, to be scored on the rate of unintentional medication discrepancies, hospitals are required to sample ≥ 30 patients from a 6-month reporting period.

If <30 patients in question #3, the hospital will be scored and publicly reported as "Limited Achievement."

Medication Reconciliation Data Collection Flow Chart

Step 2: Interview Patients and Obtain the Gold Standard Medication History (Pharmacist or Certified Pharmacy Technician)

This interview is separate from any pre-admission medication list (PAML) collected as part of normal care.

If a pharmacist, pharmacy resident, or certified pharmacy technician obtained the PAML, a different pharmacist, pharmacy resident, or certified pharmacy technician must complete this interview.

Conduct Patient Interview

A trained pharmacist, pharmacy resident, or certified pharmacy technician must interview each sampled patient within 24 hours after admission (typically the morning after).

Collect and Verify Information

- Use ≥ 2 information sources (see [MARQUIS 2 Quick Tips & Medication Reconciliation Toolkit](#)).
- Investigate discrepancies like dose, route, or timing errors before finalizing.
- They may enlist help from non-certified technicians, medical assistants, or nurses to check secondary sources (e.g., EHR, pharmacy, providers).
- Only the pharmacist, pharmacy resident or certified pharmacy technician may finalize the GSMH.

Apply Medication Inclusion or Exclusion Criteria

- Exclude medications not taken for ≥ 30 days.
- Document medications as the patient actually takes them (if different from prescribed).
- Exclude OTC/PRN meds unless clinically relevant (e.g., saline, vitamins, herbals).
- Include clinically relevant OTC/PRN meds such as inhalers, nitroglycerin, analgesics, muscle relaxants, sedatives, and topical medications with systemic effects (e.g., lidocaine)

Medication Reconciliation Data Collection Flow Chart

Step 3: Complete a Medication Reconciliation Worksheet for Each Sampled Patient (Pharmacist or Certified Pharmacy Technician)

Complete Gold Standard Medication Column

Fill out the “Gold Standard Medication” column for each Gold Standard Medication listed.

Print Medication Reconciliation Worksheet

Once the Gold Standard Medication History (GSMH) is complete, print the Medication Reconciliation Worksheet for each sampled patient.

- Print Page 1 for each sampled patient
- Print Page 2 for each Gold Standard Medication the patient is taking

Hold Worksheet Until Patient is Discharged

Once you have completed the Gold Standard Medication column for each Gold Standard Medication listed, you will need to hold on to the worksheet(s) until the patient is discharged before completing the remaining steps.

Medication Reconciliation Data Collection Flow Chart

Step 4: Compare Gold Standard Medication History to Admission Orders (Pharmacist Only)

Obtain Admission & Discharge Orders

After patient discharge, collect the admission and discharge orders.

- Admission orders include all orders written from admission through 8:00 a.m. the next morning or up to 12 hours post-admission (whichever comes first).
- Instructions for discharge order comparison will be completed in Step 5.

Compare Admission Orders to GSMH

Compare each admission order to the Gold Standard Medication list on the Medication Reconciliation Worksheet. Identify and note any differences between the two.

Assess Discrepancies

Review the patient record to determine if each difference is intentional or unintentional.

- Use “[Identifying Discrepancies Flow Charts](#)” as a guide.
- If unintentional → check “Yes”
- If intentional → check “No.”

Identify Missing Medications

Review admission orders for any medications not listed on the GSMH.

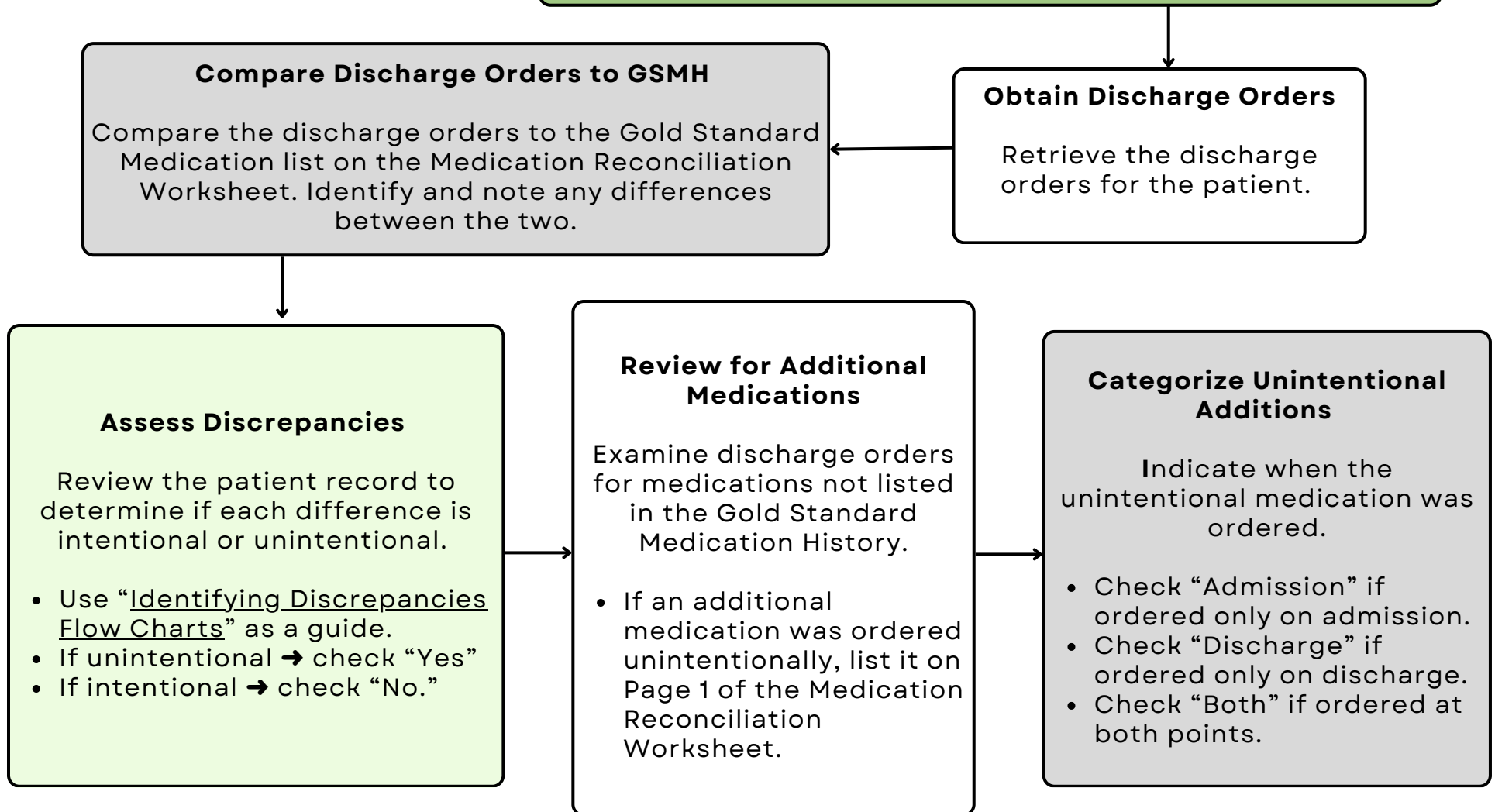
- If a new medication was added unintentionally, list it on Page 1 of the Medication Reconciliation Worksheet
- Contact the provider if clarification is needed.

Record Early Corrections

If the pharmacist detects and alerts the provider about an unintentional discrepancy ****before discharge****, and it is corrected, record it as an ****unintentional discrepancy**** in both the Admission and Discharge Comparison columns on the worksheet.

Medication Reconciliation Data Collection Flow Chart

Step 5: Compare Gold Standard Medication History to Discharge Orders (Pharmacist Only)



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Step 6: Sum the Number of Medications and Discrepancies (Survey Coordinator)

Enter Unintentionally Ordered Additional Medications

- Refer to the ****Additional Medications**** column on Page 1 of the Medication Reconciliation Worksheet.
- Sum all unintentional additional medications and enter total into the first space at the top of the worksheet.

At the top of Page 1 of the Medication Reconciliation Worksheet, there are four spaces for you to list the data for the patient.

- Total # Unintentional Additional Medications
- Total # of Admission and Discharge Discrepancies Due to Unintentional Additional Medications
- Total # of Gold Standard Medications
- Total # of Admission and Discharge Discrepancies in Gold Standard Medications

Calculate Discrepancies for Unintentional Meds

- Refer to the ****Unintentionally Ordered on**** column on Page 1 of the Medication Reconciliation Worksheet.
- Count discrepancies using these rules:
 - Ordered only on admission → 1 discrepancy
 - Ordered only on discharge → 1 discrepancy
 - Ordered on both → 2 discrepancies
- Sum all discrepancies and enter total in the second space at the top of the worksheet.

Record Gold Standard Medication Count

- Find the total number of Gold Standard Medications.
- Enter this number in the third space at the top of the worksheet.

Record GSMH Admission & Discharge Discrepancies

- Review the worksheet for each Gold Standard Medication.
- Count how many times the “Yes” boxes are checked – each represents an unintentional discrepancy.
- Sum all “Yes” responses and enter the total in the fourth space at the top of the worksheet.

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