

## Component III: Clinical

### Module G: Patient Education

#### Topic 1: The Patient and the Educational Plan

##### Statement of Purpose

To prepare the learner with the basic knowledge and skills necessary to instruct, advise and help assist a patient in creating pathways that will enable them to participate positively in their health care.

##### Student Learning Outcomes

Upon completion of this topic, the learner will be able to:

1. Spell and define the key terms.
2. Discuss the benefits of patient education.
3. Explain the role of the Medical Assistant in patient education.
4. Discuss factors that affect teaching and learning.
5. Describe how to prepare a teaching plan.
6. Describe educational materials found in a Physician's office.
7. Identify the information and materials to be included in a patient's education packet.
8. List educational resources available to patients that can be found outside of the Physician's office.
9. Discuss patient teaching needs related to office visit.

##### Terminology

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|-----------------------|------------------------|
| 1. Assessment         | 7. Learning objectives |
| 2. Consumer education | 8. Modeling            |
| 3. Documentation      | 9. Noncompliance       |
| 4. Evaluation         | 10. Philosophy         |
| 5. Implementation     | 11. Planning           |
| 6. Learning goals     | 12. Screening          |

##### References

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3. Kronenberger, J., Southard D. L., & Woodson, D. (2012). *Comprehensive Medical Assisting* (4<sup>th</sup> Ed.). Philadelphia, PA: Lippincott, Williams & Wilkins.
4. Blesi, M., Wise, B.A., & Kelley-Arney, C, (2012) *Medical Assisting Administrative and Clinical Competencies* (7<sup>th</sup> Ed.) Clifton Park, NY: Delmar, Cengage Learning.
5. Lindh, W., Pooler, M., Tamparo, C. & Dahl, B., (2013). *Comprehensive Medical Assisting Administrative and Clinical Competencies* (5<sup>th</sup> Ed.). Clifton Park, NY: Delmar, Cengage Learning.
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7. French, L.L., & Fordney, M.T. (2013). *Administrative Medical Assistant* (7<sup>th</sup> Ed.) Clifton Park, NY: Delmar, Cengage Learning.

8. Booth, K.A., Whicker, L.G., Wyman, T.D., & Moaney-Wright, S. (2011). *Medical Assisting: Administrative & Clinical Competencies with Anatomy and Physiology*. (4<sup>th</sup> Ed.). New York, NY: McGraw-Hill Company, Inc.
9. Proctor, D. B., & Young-Adams, A. P. (2011). *Kinn's The Medical Assistant: An Applied Learning Approach* (11<sup>th</sup> Ed.). Philadelphia, PA: Saunders Elsevier.

Content Outline/Theory Objectives	Suggested Learning Activities
<p><b>Objective 1</b>  <b>Spell and define key terms.</b></p> <ul style="list-style-type: none"> <li>A. Review the terms listed in the terminology section.</li> <li>B. Spell the terms listed accurately.</li> <li>C. Pronounce the terms correctly.</li> <li>D. Use the terms in their proper context.</li> </ul>	<ul style="list-style-type: none"> <li>A. Games: word searches, crossword puzzles, Family Feud, Jeopardy, bingo, spelling bee, hangman and concentration.</li> <li>B. Administer vocabulary pre-test and post-test.</li> <li>C. Discuss learning gaps and plan for applying vocabulary.</li> </ul>
<p><b>Objective 2</b>  <b>Discuss the benefits of patient education.</b></p> <ul style="list-style-type: none"> <li>A. Patient takes active role their medical care.</li> <li>B. Helps patients stay healthy and understand their body.</li> <li>C. Patient becomes more likely to comply with instruction (take medications or use medical equipment as prescribed.)</li> <li>D. Educated patients are more likely to be satisfied clients.</li> <li>E. Educated patient are less likely to call office with questions.</li> <li>F. Less frequency of office visits, emergency room (ER) visits and hospitalizations.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students find and discuss principles of adult education and the benefits of an educated patient.</li> </ul>
<p><b>Objective 3</b>  <b>Explain the role of the Medical Assistant in patient education.</b></p> <ul style="list-style-type: none"> <li>A. Patient teaching needs <ul style="list-style-type: none"> <li>1. Past and present health experiences.</li> <li>2. Current understanding of health problems.</li> <li>3. Additional information.</li> <li>4. Feelings about effects of any health problems.</li> </ul> </li> <li>B. Planning <ul style="list-style-type: none"> <li>1. Learning goals, outcome of the educational plan.</li> <li>2. Learning objectives, procedures and tasks necessary to achieve goals.</li> </ul> </li> <li>C. Implementation <ul style="list-style-type: none"> <li>1. Discussion.</li> <li>2. Teaching aids.</li> <li>3. Demonstrations.</li> </ul> </li> <li>D. Evaluation <ul style="list-style-type: none"> <li>1. On-going.</li> <li>2. At home.</li> <li>3. In office.</li> <li>4. Effectiveness.</li> </ul> </li> <li>E. Documentation <ul style="list-style-type: none"> <li>1. Patient's learning needs.</li> <li>2. Proposed teaching plan.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Discuss how teaching patients in the clinic differs from bedside teaching (including scope of practice issues): <ul style="list-style-type: none"> <li>1. Focused information</li> <li>2. Condition-based topics</li> <li>3. Ready-made teaching tools</li> <li>4. Method of gathering data</li> <li>5. Team effort</li> <li>6. Refer questions to Nurse or Physician</li> </ul> </li> <li>D. Medical Assistants are allowed to participate in teaching experience.</li> </ul>

<ol style="list-style-type: none"> <li>3. Methods used to implement plan.</li> <li>4. Progress or lack thereof.</li> <li>5. Who provided teaching?</li> </ol>	
<p><b>Objective 4</b>  <b>Discuss the factors that affect teaching and learning.</b></p> <ol style="list-style-type: none"> <li>A. Factors that promote learning <ol style="list-style-type: none"> <li>1. Emotional and physical stability of Medical Assistant and the patient.</li> <li>2. Thorough preparation.</li> <li>3. Patient's value of information.</li> <li>4. Atmosphere (friendly, professional and free of distractions.)</li> <li>5. Material organized and suitable for patient understanding.</li> <li>6. Use of different media types availability of material for home use.</li> <li>7. Immediate use.</li> <li>8. Additional services available.</li> <li>9. Ability of patient to see and hear information.</li> <li>10. Questions encouraged.</li> <li>11. Availability of material in smaller module (patient can only remember so much information for each office visit.)</li> <li>12. Confirm patient understanding.</li> </ol> </li> <li>B. Factors that hinder learning <ol style="list-style-type: none"> <li>1. Patient in pain or otherwise physically unable to learn.</li> <li>2. Patient's mental well-being.</li> <li>3. Physical impairments hinder communication.</li> <li>4. Language differences.</li> <li>5. Cultural or ethnic background differences.</li> <li>6. Condescending attitude of instructor.</li> <li>7. Use of technical words.</li> <li>8. Poor environment (cold exam room).</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> </ol>
<p><b>Objective 5</b>  <b>Describe how to prepare a teaching plan.</b></p> <ol style="list-style-type: none"> <li>A. Learning goal, description of what patient should learn from implementation of teaching plan.</li> <li>B. Material to be covered, all major topics to be discussed.</li> <li>C. Available teaching resources.</li> <li>D. MA scope of practice related to teaching process.</li> <li>E. Learning objectives, steps or procedures patient must understand or demonstrate to reflect achievement of learning goal.</li> <li>F. Evaluation, appraisal of patient's progress toward learning goal.</li> <li>G. Comments, remarks concerning circumstances that have prohibited successful achievement of learning goal.</li> <li>H. Age-appropriate teaching.</li> <li>I. Written instructions and information sheets.</li> </ol>	<ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Review  <a href="http://www.mbc.ca.gov/allied/medical_assistants_laws.html">http://www.mbc.ca.gov/allied/medical_assistants_laws.html</a></li> <li>D. Review regulation regarding teaching.</li> <li>E. Have each student create a teaching plan. Plan should include: <ol style="list-style-type: none"> <li>1. Objectives (learning goals)</li> <li>2. Teaching aids</li> </ol> </li> </ol>

J. Oral instructions.	3. Demonstrations 4. Evaluation tool 5. Evidence of how instructions are documented F. Each student can present their teaching plan to the class.
<b>Objective 6</b> <b>Describe educational materials found in a Physician's office.</b> <ul style="list-style-type: none"> <li>A. Introduction to office, philosophy of patient care.</li> <li>B. Physician qualifications.</li> <li>C. Description of practice.</li> <li>D. Introduction to office staff, responsibilities and duties.</li> <li>E. Office hours: routine, holidays and emergency hours.</li> <li>F. Appointment scheduling, procedure and canceling.</li> <li>G. Telephone policy, billable and non-billable.</li> <li>H. Payment policies, types of payment, when required and billing procedures.</li> <li>I. Insurance policies, proof of coverage and claim forms.</li> <li>J. Patient confidentiality statement and privacy policy.</li> <li>K. Vaccine Information Statement (VIS) forms for vaccine information.</li> <li>L. Community activities promoting health and wellness.</li> <li>M. Information sheets and brochures about different diagnostic testing.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Provide lists and examples of various pre-made teaching booklets and pamphlets.</li> <li>D. Ask students to bring into class examples from their clinical area or institution's teaching materials.</li> </ul>
<b>Objective 7</b> <b>Identify the information and materials to be included in a patient's education packet.</b> <ul style="list-style-type: none"> <li>A. Introduction to office, philosophy of patient care.</li> <li>B. Physician qualifications.</li> <li>C. Description of practice.</li> <li>D. Introduction to office staff, responsibilities and duties.</li> <li>E. Office hours, routine, holiday and emergency hours.</li> <li>F. Appointment scheduling, procedure and canceling.</li> <li>G. Telephone policy, billable and non-billable.</li> <li>H. Payment policies, types of payment, when required and billing procedures.</li> <li>I. Insurance policies, proof of coverage and claim forms.</li> <li>J. Patient confidentiality statement and privacy policy.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Prepare an example of a patient education packet.</li> </ul>

<p><b>Objective 8</b>  <b>List educational resources available to patients that can be found outside of the Physician's office.</b></p> <ul style="list-style-type: none"> <li>A. Alzheimer's Association.</li> <li>B. American Cancer Society.</li> <li>C. American Diabetes Association.</li> <li>D. American Heart Association.</li> <li>E. The Arthritis Foundation.</li> <li>F. National AIDS Foundation.</li> <li>G. National Kidney Foundation.</li> <li>H. National Clearing House for Alcohol and Drug Information.</li> <li>I. Local Public Health Departments.</li> <li>J. Local libraries.</li> <li>K. Internet.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Ask students to create an educational resource guide.</li> </ul>
<p><b>Objective 9</b>  <b>Discuss patient teaching needs related to office visit.</b></p> <ul style="list-style-type: none"> <li>A. Prescriptions and refills.</li> <li>B. Diagnostic testing.</li> <li>C. Nutrition and diet therapy.</li> <li>D. Fitness and weight control.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Discuss what information needs to be delivered by Physician or Registered Nurse.</li> </ul>