

The Self-Medication Assessment Tool (SMAT) Training Program

## **Module II: Administration and Scoring**

### **Part B: Instructions for Administering the SMAT**

## The Self-Medication Assessment Tool (SMAT) Training Program

### **Getting Started**

- ✓ Ensure that patient is seated comfortably.
- ✓ Ask any accompanying family members or caregivers to wait outside the assessment room.
- ✓ Obtain consent using the method described earlier in this module.
- ✓ If the patient has brought medications, check the label information against the list that was completed on the assessment form.
- ✓ Take some time to establish rapport by asking some general questions about education and work history. This information can be entered in Section 1 of the form.

## The Self-Medication Assessment Tool (SMAT) Training Program

### Getting Started

- Recall from Module I that the assessment examines three main areas:
  - Functional
  - Cognitive
  - Adherence to medication (recall, purposeful non-adherence, and self-reported adherence)
- The first part of the assessment is mainly about the cognitive and functional assessment, while the second part covers recall and adherence.
- Remember: Follow the questions and instructions word for word.

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

Begin the assessment with **Bottle #1 – 10 point font, child-resistant 7 dram vial, align arrows top.**

Ask Question F1: “Please read the medication name and instructions from the label on this bottle out loud.”

Record the patient’s score for the following using the “Ease” “Difficulty” “Unable” scale:

- Medication name (spelling it is acceptable if it’s difficult to pronounce)
- Instructions

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

**(Continued: Bottle #1 – 10 point font, child-resistant 7 dram vial, align arrows top)**

Ask Question F2: “Please open the bottle.”

Record the patient’s score for the following using the “Ease” “Difficulty” “Unable” scale

- The patient must be able to align the arrows on the cap and the vial and remove the cap

Ask Question C1: “If this was your medication, how would you take it?”

- Record the score for dosage
- Record the score for choosing a regular time of day (e.g.: Once each morning).

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

Repeat this procedure with **Bottle 2, 12 point font, child-resistant 12 dram vial, push and turn cap.** Answers are recorded under F3, F4, and C2.

Begin this procedure a third time, using **Bottle 3, 14 point font, 40 dram vial, flip open cap.** Record the answers for F5 and F6, and C3.

Continue questioning with this bottle:

F7 “Please take 2 pills out of the bottle”

- Patient must be able to open the vial, remove 2 tablets and place them on the table and close the vial
- The tablets removed are set aside by the assessor to be destroyed after the assessment
- Record the score for F7

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

Sample video clip 1:

The following video clip shows patient A.M. as she completes the tasks that were just described.

(Please note that the patient's face has been obscured to protect her identity.)

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

- C4: **bottles # 3, 4, 5**; 14 pt font; non-child-resistant (flip open cap); 40 dram vial
  - Have the patient read the label instructions on each of the vials, then ask:
    - “If you were prescribed all 3 of these medications, describe when (the times of the day) you would take the tablets and how many you would take at each time, for a typical day.”



## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- C4 Continued...
- Record the patient's score for interpreting the correct dosage and time for each medication
  - The patient is expected to organize the medications for a typical day.
  - For example, "one of each medication at breakfast, then one of the 3x/day tablets at lunch and one at supper."

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

Sample video clip 2:

The following video clip shows patient A.M. as she completes the tasks that were just described.

(Please note that the patient's face has been obscured to protect her identity.)

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

- C5: use the prefilled dosette (weekly pill organizer)
  - Explain the layout of the dosette to the patient as follows:
    - “The names of the days are printed across the top and the times of day are printed along the side. Here is Sunday, Monday, Tuesday, etc. and here is the slots to store the pills to take at each time of the day: morning, noon-time meal; evening meal; and before bed.”
  - Ask the patient to “ Please point to the slot for Tuesday at noon.”

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- F8/C6: use the prefilled dosette (weekly pill organizer)
  - Ask the patient to “ Please take out the pill(s) for Friday morning.”
  - Record the patient’s score for Function (i.e.: ability to remove all tablets without dropping any on the floor).
  - Record the patient’s score for Cognition (i.e.: selecting the correct day and time, and following the instructions).

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- C7: use bottles # 3,4,5 and an empty 7 day x 4 time slot dosette
  - Place the bottles and the empty dosette on the table in front of the patient.
  - Instruct the patient to read the label instructions and to “Place the pills from the 3 bottles into the dosette in the correct way for a full week (7 days).”

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Record the time started and time finished
  - Allow a maximum of 10 minutes for this task.
  - The patient should not be interrupted during this task.
  - The assessor should move back from the patient and direct his/her attention to an alternative task.
  - If the patient requires clarification of instructions, they can be reread once with no effect on the score.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Record the patient's score for correct dose and correct time for each medication.
  - The patient must fill the dosette with 100% accuracy in order to obtain "ease" for each medication.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

Sample video clip 3:

The following video clip shows patient B.M. as she completes the tasks that were just described.

(Please note that the patient's face has been obscured to protect her identity.)



## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- C8, C9, and F9: use a filled blister package (compliance package)
  - Explain the packaging to the patient as follows:
    - “This is blister packaging for medication. The names of the days are printed along the side and the times of the day are printed across the top. Here is Sunday, Monday, Tuesday, etc. and here are the times to take the medication, morning, noon, evening meal and bedtime.”
  - Show the patient how to remove the tablets from the foil packaging.

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

- C8: Ask the patient to “Please point to the bubble that contains the pills for Monday evening.”
  - Record the patient’s score.
- F9/C6: using the same blister pack, ask the patient to “Please take out the pills for \_\_\_\_\_ (assessor to choose day and time).”
  - Record the patient’s score for Function (i.e.: ability to remove all tablets without dropping any on the floor).
  - Record the patient’s score for Cognition (i.e.: selecting the correct day and time, and following the instructions).

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- F10 and F11: use the two packages of coloured tablets; one contains light colours and one contains dark colours
  - Show the package of light coloured tablets to the patient and ask that he/she describe “ What colour is each of these pills?”
  - Record the patient’s responses as “ease” or “unable.”
  - Repeat with the dark coloured tablets.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

Sample video clip 4:

The following video clip shows patient B. P. as she completes the tasks that were just described. Notice the difficulty B. P. has in removing items from the blister package.

(Please note that the patient's face has been obscured to protect her identity.)

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Patient's self-assessment of abilities can be solicited during the assessment as a way to maintain rapport (these are on pages 3 and 4).
  - Do you have any difficulty swallowing tablets?
  - Do you have any difficulty hearing?
  - Do you have any problems with your vision?
  - Do you have a daily routine that helps to remind you to take your medications?

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Medication Recall/Adherence
  - Ask the patient, “ Do you use anything to help you remember to take your medication?”
    - Provide examples from the list
    - Record response
  - Do you have a regular pharmacist/pharmacy?
    - Record pharmacy name

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Patient Recall
  - The assessor is responsible for ensuring that the Reference Drug List is as accurate as possible (see section on “Preparing for the Assessment”).
  - Explain to the patient that you are going to discuss the medications that they are currently using (or, were using prior to hospitalization).

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

- Patient Recall
  - Ask the patient to recall any information that he/she can about these medications.
    - The name of the drug
    - The indication for taking the drug i.e. “What do you use it for?”
    - The dose frequency i.e. “the number of tablets/capsules that you take each day and the times that you take them”
    - A description of the drug (colour, shape, dosage form or strength)
  - Do not interrupt the patient during the recall phase.
  - Record all of the “able” responses as they are recited by the patient.



## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

Sample video clip 5:

The following video clip shows patient A. M. as she completes the recall portion of the assessment. Note: Clip has been edited to remove conversations not relevant to the assessment.

(Please note that the patient's face has been obscured to protect her identity.)

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

- Self-Reported Adherence
- This scale provides the patient with the opportunity to describe his/her personal evaluation of their medication adherence. The Reference Drug List is used as a comparator.
  - For each medication on the Reference Drug List, the patient is asked:
    - Did you take it every day or less often?
    - How much did you take each time?
    - How many times per day did you take it?
    - At what times did you take it?
  - The assessor can cue the patient by using the medication name, the indication or the medication description.

## The Self-Medication Assessment Tool (SMAT) Training Program

### During the Assessment

- Self-Reported Adherence
  - Patients who have very limited recall or knowledge of their medication regimen will find it difficult to complete this scale.
    - The general question, “Did you take it every day or less often?” can be asked.
    - The patient is scored as U=unable if not able to respond to the more specific questions about timing and frequency.
    - The patient is scored as A=Able for each correct response to the questions for each medication.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Self-Reported Adherence
  - Note: If patients have provided “able” responses for dose frequency for medications in the Recall section, a score of “able” can be assigned for the same questions in the Self-reported adherence section.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Purposeful Non-Adherence
  - This scale is designed to identify factors that can influence a person's decision to intentionally underuse, overuse or stop using a medication.
  - Patients who have very limited recall or knowledge of their medication regimen will find it difficult to complete this scale.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Purposeful Non-Adherence
  - The Reference Drug List is used as a comparator.
  - For each medication on the Reference Drug List, the patient is asked:
    - “Did this medication ever bother you in any way?”
    - “In your opinion, is this medication helping you?”
  - A score of 0 to 3 is assigned to each medication using the definitions on the assessment form.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Purposeful Non-Adherence
  - To identify intentional decisions to stop a medication, the patient is given a brief explanation followed by a question:
    - “Sometimes, people decide that it is best for them not to take a medication they’ve been prescribed.”
    - “Did you ever decide not to take this medication? If so, why?”

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

- Purposeful Non-Adherence
  - When the patient has responded in the affirmative, the following question is asked:
    - “How often do you think you’ve decided not to take this medication?”
    - A score of 0 to 4 is assigned to each medication using the definitions on the assessment form.



## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

Sample video clip 6:

The following video clip shows patient E. K. as she completes the tasks that were just described.

(Please note that the patient's face has been obscured to protect her identity.)

## The Self-Medication Assessment Tool (SMAT) Training Program

### **Cuing and Feedback**

- The purpose of cuing and feedback during assessment is to guide the patient when needed in a way that does not interfere with how they do the task.
- This can be difficult, because it's natural to want to help the patient when they are struggling. However, it is very important to use cuing and feedback as described, or the results of the assessment may not be accurate.
- The examples that follow indicate the appropriate level of cuing and feedback for the various sections of the SMAT assessment.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **Cuing and Feedback**

- Functional and Cognitive Questions
  - Examples for the “EASE” category
    - Patient tries the cap, realizes it won’t flip open, reads the instructions on the lid, and then opens the bottle with no further problem.
    - Patient states they would take the pill with water: assessor can cue first time to be more specific (i.e. when and how many) but if required to cue again for same reason for next bottle, that moves the score to difficult.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **Cuing and Feedback**

- Functional and Cognitive Questions
  - Examples for the “EASE” category
    - Patient states they would ask the pharmacist (or MD) about how to take the medication, the assessor can give some guidance (e.g. say that the pharmacist says it does not matter when it is taken).
    - Patient puts all the medication correctly into the dosette, or discovers error and corrects it without any prompting from tester.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **Cuing and Feedback**

- Functional and Cognitive Questions
  - The category “DIFFICULTY” is checked off when the patient makes one or more errors, or needs prompting/cueing from the tester to carry out the task.
    - e.g., the patient needs to be told to read the instructions on the bottle cap.
    - e.g., the patient makes one or more errors and needs to be asked to check for errors, or needs to be given direction to complete the task.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **Cuing and Feedback**

- Functional and Cognitive Questions (continued)
  - The category “UNABLE” is checked off when the patient is unable to carry out the task or answer the question, even when prompted or cued by the tester.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **Cuing and Feedback**

- Recall Section
  - The assessor can cue the patient to complete categories that the patient did not recall initially.
    - For example, the patient has recalled taking a pink blood pressure pill once a day; the assessor can then ask if the patient is able to recall the drug name and the dose frequency.
  - The patient is given a score of U = unable when not able to respond correctly, even after prompting or cueing.
  - The patient is given a score of A = able for all correct responses.

## The Self-Medication Assessment Tool (SMAT) Training Program

### **During the Assessment**

Sample video clip 7:

The last video clip shows an example of cuing and feedback with patient A. M.

(Please note that the patient's face has been obscured to protect her identity.)



## The Self-Medication Assessment Tool (SMAT) Training Program

Please continue with the next link: [Scoring & Kit Cleaning and Maintenance](#)