CHAPTER 4

Patient Education

**Cognitive Domain**

1. Spell and define the key terms
2. Explain the medical assistant’s role in patient education
3. Define the five steps in the patient education process
4. Identify five conditions that are needed for patient education to occur
5. Explain Maslow’s hierarchy of human needs
6. List five factors that may hinder patient education and at least two methods to compensate for each of these factors
7. Discuss five preventive medicine guidelines that you should teach your patients
8. Explain the kinds of information that should be included in patient teaching about medication therapy
9. Explain your role in teaching patients about alternative medicine therapies
10. List and explain relaxation techniques that you and patients can learn to help with stress management
11. Describe how to prepare a teaching plan
12. List potential sources of patient education materials
13. Locate community resources and list ways of organizing and disseminating information
14. Recognize communication barriers
15. Identify techniques for overcoming communication barriers
16. Identify resources and adaptations that are required based on individual needs i.e. culture and environment, developmental life stage, language, and physical threats to communication

**Psychomotor Domain**

1. Document patient education (Procedure 4-1)
2. Develop and maintain a current list of community resources related to the patient’s health care needs (Procedure 4-2)

**Affective Domain**

1. Use language/verbal skills that enable patients’ understanding
2. Demonstrate respect for diversity in approaching patients and families
3. Demonstrate empathy in communicating with patients, family and staff
4. Demonstrate sensitivity appropriate to the message being delivered
5. Demonstrate recognition of the patient’s level of understanding in communications
6. Demonstrate sensitivity to patient rights

**ABHES Competencies**

1. Identify and respond appropriately when working/caring for patients with special needs
2. Adapt to individualized needs
3. Communicate on the recipient’s level of comprehension
4. Be impartial and show empathy when dealing with patients
MULTIPLE CHOICE

Circle the BEST answer.

1. During assessment, the most comprehensive source from which to obtain patient information is the:
   a. physician’s notes.
   b. immunization record.
   c. medical record.
   d. family member.
   e. nurse.

2. When teaching a patient with many chronic health problems, it is important to:
   a. focus on each problem separately.
   b. tell them that your grandmother has many of the same problems.
   c. bond with him or her.
   d. have the patient come back another time with a family member.
   e. have the physician talk to him or her.

3. Which of the following is an example of a psychomotor skill that a patient may perform?
   a. Telling the physician about his or her symptoms
   b. Explaining how a part of the body is feeling
   c. Walking around with a crutch
   d. Watching television in the waiting room
   e. Listening to a physician’s instructions

4. Which part of Maslow’s pyramid is the point at which a patient has satisfied all basic needs and feels he or she has control over his or her life?
   a. Safety and security
   b. Esteem
   c. Self-actualization
   d. Affection
   e. Physiologic

5. Noncompliance occurs when the patient:
   a. experiences a decrease in symptoms healed.
   b. forgets to pay his or her bill.
   c. refuses to follow the physician’s orders.
   d. requests a new medical assistant to assist the physician.
   e. agrees with the physician.

6. The power of believing that something will make you better when there is no chemical reaction that warrants such improvement is:
   a. self-relaxation.
   b. positive stress.
   c. acupuncture.
   d. placebo.
   e. visualization.

7. Patient education should consist of multiple techniques or approaches so:
   a. the patient can apply his or her new knowledge to real-life events.
   b. the patient will learn and retain more.
   c. the patient will understand that there are many ways to look at an issue.
   d. the patient will know where you stand on his or her health care options.
   e. the patient will have a wider choice of treatments.

8. One mental health illness that can hinder patient education is:
   a. diabetes.
   b. Lyme disease.
   c. obstructive pulmonary disease.
   d. Alzheimer disease.
   e. anemia.
9. Health assessment forms that assess a patient's education level may also help you determine a patient's ability to:
   a. read.
   b. listen.
   c. communicate.
   d. respond.
   e. evaluate.

10. Before developing a medication schedule, you should evaluate the patient's:
    a. prescribed medication.
    b. side effects.
    c. changes in bodily functions.
    d. daily routine.
    e. bowel movements.

11. Which is an example of a recommended preventive procedure?
    a. Regular teeth whitening
    b. Childhood immunizations
    c. Daily exercise
    d. Yearly lung cancer evaluations
    e. Occasional antibiotics

12. Which of the following is true of herbal supplements?
    a. A medical assistant can recommend that a patient start taking herbal supplements without the physician's approval.
    b. A health store clerk is a good source of information on supplements.
    c. Products that claim to detoxify the whole body are generally effective.
    d. Supplements will not interfere with blood sugar levels because they are not medication.
    e. Patients should be advised that because a product is natural does not mean it is safe.

13. One example of a physiologic response to negative stress is:
    a. elevated mood.
    b. hunger pangs.
    c. headache.
    d. profuse bleeding.
    e. energy boost.

14. In Maslow's hierarchy of needs, air, water, food, and rest are considered:
    a. affection needs.
    b. safety and security needs.
    c. esteem needs.
    d. self-actualization needs.
    e. physiologic needs.

15. When explaining the benefits and risks of a proposed treatment to a patient who uses American Sign Language to communicate, the physician must:
    a. be sure the patient is given the information in writing.
    b. provide a sign language interpreter if the patient does not bring one.
    c. make the patient feel comfortable.
    d. use a notepad to communicate.
    e. let the medical assistant handle it.

16. Humans use defense mechanisms to:
    a. cope with painful problems.
    b. increase their sense of accomplishment.
    c. decrease effects of chronic physical pain.
    d. learn to get along well with others.
    e. explain complicated emotions to medical staff.

17. Support groups give patients the opportunity to:
    a. exchange and compare medical records.
    b. meet and share ideas with others who are experiencing the same issues.
    c. spread the good word about the medical office.
    d. obtain their basic physiologic needs.
    e. learn more about malpractice suits.
18. When selecting teaching material, you should first:
   a. choose preprinted material.
   b. create your own material.
   c. assess your patient's general level of understanding.
   d. let the patient find a book from the clinic library.
   e. ask the patient to create a list of specific questions.

19. Acupressure is different from acupuncture because:
   a. it does not use needles.
   b. it is not an alternative medicine.
   c. it cannot be used with cancer patients.
   d. it does not require any licensure.
   e. it is less effective.

20. If your community does not have a central agency for information and resources, then you should create a(n):
   a. hierarchy of needs.
   b. teaching plan.

21. Suppose you want to teach a patient about the need to adopt a low-sugar diet because of diabetes, but the patient doesn’t believe that diabetes is a serious health problem. If education is to be effective, then which of the following must the patient accept? Circle all that apply.
   a. Diabetes has to be managed.
   b. There is a correlation between high sugar intake and diabetes.
   c. Diabetes isn’t as serious as other diseases.
   d. Diabetes management requires dietary changes.
   e. It is possible to consume large quantities of high-sugar foods, but only occasionally.

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**Matching**

Match the following key terms to their definitions.

<table>
<thead>
<tr>
<th>Key Terms</th>
<th>Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>22. alternative treatment</td>
<td>a. involves using the information you have gathered to determine how you will approach the patient's learning needs</td>
</tr>
<tr>
<td>23. assessment</td>
<td>b. skill that requires the patient to physically perform a task</td>
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<tr>
<td>24. coping mechanisms</td>
<td>c. the process that indicates how well patients are adapting or applying new information to their lives</td>
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<td>25. dissemination</td>
<td>d. produced by illness or injury and may result in physiological and psychological effects</td>
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<td>26. documentation</td>
<td>e. includes procedures or tasks that will be discussed or performed at various points in the program to help achieve the goal</td>
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<tr>
<td>27. evaluation</td>
<td>f. the process of distributing information on community resources</td>
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<tr>
<td>28. implementation</td>
<td>g. includes recording of all teachings that occurred</td>
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<tr>
<td>29. learning objectives</td>
<td>h. the patient's inability or refusal to follow a prescribed order</td>
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<tr>
<td>30. noncompliance</td>
<td>i. involves gathering information about the patient's present health care needs and abilities</td>
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<td>31. placebo effect</td>
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<tr>
<td>32. planning</td>
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</tbody>
</table>
33. _____ psychomotor
34. _____ stress

j. psychological defenses employed to help deal with the painful and difficult problems life can bring

k. the power of believing that something will make you better when there is no chemical reaction that warrants such improvement

l. the expected outcomes for the teaching process

m. an option or substitute to the standard medical treatment such as acupuncture

**SHORT ANSWER**

35. List three potential sources of patient education materials.

36. List and explain three relaxation techniques that you and patients can learn to help with stress management.

**WHAT WOULD YOU DO?**

37. You work in a pediatric practice. A mother brings her 6-month-old son in for a routine checkup. The child has a visible lump on the right side of his head, just above his ear. The mother states that the child fell off a twin bed when she was changing his diaper. After examining the child, the physician asks you to instruct the mother in safety and also have her watch the baby closely for the next few days for signs of concussion.

A. What resources might be available to you?

B. How might you evaluate the mother’s barriers to communication and understanding?
C. What method of instruction would you use for this situation?

D. What would your teaching plan need to include?

E. What measures should be taken if the child’s injuries were consistent with possible abuse?

F. Why is patient education important?

38. Write a sentence explaining why, as a medical assistant, you must set aside your own personal feelings and life experiences when educating patients.

39. ____________________________________________________________________________

40. ____________________________________________________________________________

41. ____________________________________________________________________________

42. ____________________________________________________________________________

43. ____________________________________________________________________________

IDENTIFICATION

List the five factors that can hinder patient education.

Grade: _________

39. ____________________________________________________________________________

40. ____________________________________________________________________________

41. ____________________________________________________________________________

42. ____________________________________________________________________________

43. ____________________________________________________________________________
ACTIVE LEARNING

44. Juggling school with other commitments may occasionally cause negative stress in your life. Make a list of how you experience stress in your daily life. Then, choose one of the three relaxation techniques discussed in this chapter. Practice that technique and then write a paragraph describing the “pros” and “cons” of the chosen technique.

45. Develop a teaching plan for a family member or friend. For example, if your mother has asthma, then do research on the Internet to find information and resources about asthma. Remember to include all of the elements of a teaching plan. Practice your teaching techniques by educating a family member or friend about a particular illness or disease.

46. Choose a health concern that may require external support. For example, a patient fighting cancer may wish to join a support group or other organization for help. Search the Internet for local, state, and national agencies that provide information, support, and services to patients with your chosen need. Then, compile this information in an informative and creative brochure, pamphlet, or other learning tool.

PATIENT EDUCATION

47. A patient wants to use alternative medicine in addition to medicine prescribed by the physician. What should you do?
48. A patient in your care is suffering physiologic effects from negative stress brought on by chronic back pain. What types of coping strategies would you recommend to the patient and why?

49. Julia is an 8-year-old patient who has been diagnosed with type 1 diabetes. The medical office has a preprinted teaching plan entitled “Living with Type 2 Diabetes.” Should you use this plan or develop your own? Explain.

TRUE OR FALSE?

Determine whether the following statements are true or false. If false, explain why.

50. Patients benefit from the use of teaching aids that they can take home and use as reference material.

51. If a patient asks you a question and you’re not sure of the answer, then you should give your best guess.

52. A patient must have his basic needs met before self-actualization may occur.

53. Visualization is a relaxation technique that involves deep-breathing and physical exercise.
**CASE STUDY FOR CRITICAL THINKING A**

A 5-year-old girl in your pediatric practice has just been diagnosed with juvenile diabetes. Your physician asks you to assist the patient’s parents with resources available to them.

54. From the following list, circle the BEST resource.

- a. Materials from a pharmaceutical company
- b. Other patients who have this problem
- c. The official website of the American Diabetes Association
- d. Another pediatrician’s office
- e. American Medical Technologists, Inc.

55. When developing a teaching plan, circle the most appropriate entry under Learning Objectives?

- a. Patient not involved in training due to age
- b. Patient’s mother describes the body’s use of insulin
- c. See documentation of patient education in chart
- d. Gave patient instructional video: “Your Child and Diabetes”
- e. Patient understands disease

**CASE STUDY FOR CRITICAL THINKING B**

Your physician instructs you to come up with a plan for Mr. Johns who has been diagnosed with hypercholesterolemia. He needs to change his eating habits and lifestyle drastically. You plan to help him form a plan for making these changes.

56. Patients should be encouraged to take an active approach to their health and health care education. To assist Mr. Johns effectively, which of the following must you do? Circle all that apply.

- a. Help Mr. Johns accept his illness.
- b. Expect Mr. Johns to follow your instructions without further explanation.
- c. Involve Mr. Johns in the process of gaining knowledge.
- d. Provide Mr. Johns with positive reinforcement.
- e. Give Mr. Johns the most in-depth professional textbooks you can find.
57. Your plan for Mr. Johns should include all of the following EXCEPT:
   a. A timeline for a gradually progressing walking program
   b. recipes for low-fat dishes
   c. pamphlets with information about his condition
   d. documentation of your instruction
   e. a list of his medications

58. Ms. Jasinski is an older adult patient who has recently lost several relatives and friends. She lives alone, feels disconnected from others and, as a result, her health has begun to deteriorate. Brian, a medical assistant, gives Ms. Jasinski a friendly hug when he sees her during patient visits. He talks to her and listens to her stories. He has also encouraged her to join a senior citizens’ group. Circle which of Maslow’s hierarchy of needs has Brian helped fulfill for Ms. Jasinski?
   a. physiological
   b. safety and security
   c. affection and belonging
   d. self-actualization
## Patient Education

### PROCEDURE 4-1: Document Patient Education

<table>
<thead>
<tr>
<th>Name:</th>
<th>Date:</th>
<th>Time:</th>
<th>Grade:</th>
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</thead>
</table>

#### EQUIPMENT/SUPPLIES:
- Patient’s chart, pen

#### STANDARDS:
Given the needed equipment and a place to work, the student will perform this skill with ____% accuracy in a total of ____ minutes. *(Your instructor will tell you what the percentage and time limits will be before you begin.)*

#### KEY:
- 4 = Satisfactory
- 0 = Unsatisfactory
- NA = This step is not counted

#### PROCEDURE STEPS

<table>
<thead>
<tr>
<th>PROCEDURE STEPS</th>
<th>SELF</th>
<th>PARTNER</th>
<th>INSTRUCTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Record the date and time of teaching.</td>
<td>☐</td>
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<tr>
<td>2. Record the information taught.</td>
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<tr>
<td>3. Record the manner in which the information was taught.</td>
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<td>4. Record your evaluation of your teaching.</td>
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<td>5. Record any additional teaching planned.</td>
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<tr>
<td>6. <strong>AFF</strong> Explain what you would do if you forgot to document an action you took during the patient education process.</td>
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**Note:** The medical assistant may sign his or her name in the patient record using only the “CMA” credential if the office has a signature log denoting the entire credential as “CMA(AAMA).”

#### CALCULATION

Total Possible Points: ____

Total Points Earned: ____ Multiplied by 100 = ____ Divided by Total Possible Points = ____ %

**PASS** ☐ **FAIL** ☐

**COMMENTS:**

- Student’s signature __________________________ Date _________
- Partner’s signature __________________________ Date _________
- Instructor’s signature _________________________ Date _________
### Procedure 4-2

**Develop and Maintain a Current List of Community Resources Related to Patients’ Healthcare Needs**

| Name: __________________________ | Date: _____ | Time: _____ | Grade: ______ |

**EQUIPMENT/SUPPLIES:** Phone book, Internet, newspaper

**STANDARDS:** Given the needed equipment and a place to work, the student will perform this skill with ____% accuracy in a total of _____ minutes. *(Your instructor will tell you what the percentage and time limits will be before you begin.)*

**KEY:**
- 4 = Satisfactory
- 0 = Unsatisfactory
- NA = This step is not counted

<table>
<thead>
<tr>
<th>PROCEDURE STEPS</th>
<th>SELF</th>
<th>PARTNER</th>
<th>INSTRUCTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Assess the patient’s needs for the following:</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>a. Education</td>
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</tr>
<tr>
<td>b. Someone to talk to</td>
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<td>c. Financial information</td>
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<tr>
<td>d. Support groups</td>
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<tr>
<td>e. Home health needs</td>
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<tr>
<td>2. Check the local telephone book for local and state resources.</td>
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<tr>
<td>3. Check for Web sites for the city and/or county in which the patient lives.</td>
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<tr>
<td>4. Be prepared with materials already on hand.</td>
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<td>5. Give the patient the contact information in writing.</td>
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<td>6. Document actions and the information given to the patient.</td>
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<tr>
<td>7. Instruct the patient to contact the office if he has any difficulty.</td>
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<tr>
<td>8. <strong>AFF</strong> Explain what suggestions or assistance you would offer to a patient who would benefit from online patient education resources but does not own a computer.</td>
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</tbody>
</table>
CALCULATION
Total Possible Points: _______
Total Points Earned: _______ Multiplied by 100 = _______ Divided by Total Possible Points = _______ %

PASS  FAIL  COMMENTS:

☐  ☐

Student’s signature ____________________________ Date ______
Partner’s signature ____________________________ Date ______
Instructor’s signature ____________________________ Date ______