



Risk management in Home Medicine Reviews: Practical strategies for credentialed pharmacists

Home Medicine Reviews (HMRs) provide an opportunity for consumers, credentialed pharmacists and medical practitioners to work together to optimise medication use, prevent medication-related harms and improve the consumers health. Conducting an HMR in a person's home adds layers of clinical, environmental and interpersonal risk that must be planned for and actively managed. Effective risk management is not about avoiding risk altogether, it's about anticipating and responding to it thoughtfully in line with professional obligations. The following information highlights key risk areas and practical strategies in planning for, minimising and managing risks you may encounter when conducting HMRs.

Key risk areas and practical strategies

1. Before the visit: Plan and prepare

- Screen the referral for factors that may increase risk (cognitive impairment, mobility issues, medical conditions and history of actual or threatened aggression or violence).
- Contact the referrer or regular pharmacist for insights into behaviour or setting.
- Call the patient/carer to confirm who will be present at the residence and/or involved in the interview, any pets (ask they be restrained), access/fencing and cultural/language needs. Ask about environmental risks (e.g. bushfire action plan, water, uneven road surfaces).
- Share your visit plan with a trusted person. Use phone location sharing or a timed check-in call. Check for difficulties with phone reception beforehand.
- Bring ID/badge, referral letter, secure documentation method (digital or physical), hand sanitiser/PPE, list of emergency contacts.

2. On arrival: Personal and environmental safety

- Scan your surroundings
 - » Outside of the residence check access (paths, stairs, gates, fencing, intercom, lighting), street signs/property number, parking, and plan an exit route.
 - » Inside of the residence note hoarding, trip hazards, unsecured pets, smoking, alcohol, substances, weapons. Position yourself near exits.
- Dress professionally. Introduce yourself clearly, show ID and reconfirm consent.
- If unsafe at any point, politely end the visit and reschedule or decline further involvement if needed.

3. Privacy and confidentiality risks

- Ask if the patient is comfortable discussing health matters with others present (e.g. family/carer). Be cautious of unintentional breaches (e.g. others overhearing or seeing documents).
- Use password-protected devices. Never leave notes or devices unattended in cars or homes.
- If you're unable to conduct the HMR, gain consent before forwarding referrals.

4. Communication and cultural sensitivity

- Consider whether the patient would prefer a male or female pharmacist to conduct the review.
- Consider whether a chaperone be present at the interview or a person to assist with response where there may be a cognition or hearing issue for the patient.
- Respect family dynamics and ensure the patient's voice is prioritised.
- Use professional interpreters rather than family where possible.
- Decline gifts or non-clinical tasks politely; refer social issues to support services.
- Respect cultural norms (e.g. removing shoes, appropriate eye contact, use of titles).

5. After the review: Documentation and follow-up

- Document clearly and objectively. Report safeguarding concerns via appropriate channels.
- Store documentation securely, in line with privacy standards.

6. Ongoing risk management

- Reflect: What risks did you encounter? What worked? What could be improved?
- Debrief with peers and supervisors as needed.
- Maintain training in mental health, elder abuse, cultural competence, and domestic violence.

Be prepared. Be professional. Be safe.

Effective risk management during HMRs is essential to delivering high-quality, respectful and safe care in the home environment. Pharmacists must balance the benefits of home visits with the responsibility to identify, document and mitigate risks – while safeguarding patient privacy and their own wellbeing.

Report an incident at any time by
logging into the PDL member portal