



Interdisciplinary Management of Macrocytic Anemia: Integrating Family Medicine, Nursing, and Pharmacological Approaches to Diagnosis, Treatment, and Patient Education

Dhayah Deherb Alshammri ⁽¹⁾, Fatimah Mashi Alshammari ⁽²⁾, Abdulaziz Musallam Alsharari ⁽³⁾, Norah Mawaad Rubain Alrashidi ⁽⁴⁾, Areej Ali Hassan Asiri ⁽⁵⁾, Domoa Mohammed Salem Ali ⁽⁶⁾, Hind Mohammed Alshahrani ⁽⁷⁾, Dalal Rotain Zaal Al Enazi ⁽⁸⁾, Ahmed Moner Alqerafi ⁽⁹⁾, Aisha Mohammed Al Abdin ⁽¹⁰⁾, Zaid Honoud Muhanna Alshammari ⁽¹¹⁾

(1) Hafar Albatin Health Cluster, Ministry of Health, Saudi Arabia,

(2) Hafer Albatan Cluster (E3), Ministry of Health, Saudi Arabia,

(3) Qurayyat General Hospital, Ministry of Health, Saudi Arabia,

(4) Al-Ghazalah Health Center, Hail, Ministry of Health, Saudi Arabia,

(5) Bahra Phc, Ministry of Health, Saudi Arabia,

(6) Arar, Ministry of Health, Saudi Arabia,

(7) Ministry Of Health Branch In The Eastern Province, Saudi Arabia,

(8) Al-Yamamah Hospital, Ministry of Health, Saudi Arabia,

(9) Maternity And Children's Hospital, Saudi Arabia,

(10) Maternity And Children's Hospital In Medina, Saudi Arabia,

(11) Hail Health Cluster, Ministry of Health, Saudi Arabia

Abstract

Background: Macrocytic anemia, characterized by an elevated Mean Corpuscular Volume (MCV >100 fL), is a common hematologic disorder with a broad differential diagnosis, primarily categorized into megaloblastic and nonmegaloblastic types. Megaloblastic anemia, most often caused by deficiencies in vitamin B12 or folate, results from impaired DNA synthesis and can lead to irreversible neurological damage if untreated.

Aim: This article aims to outline an interdisciplinary framework for the diagnosis, management, and patient education of macrocytic anemia, integrating the roles of family medicine, nursing, and pharmacology to optimize patient outcomes and prevent complications.

Methods: A comprehensive review of the pathophysiology, etiology, and evaluation of macrocytic anemia is presented. The diagnostic approach emphasizes a detailed history, physical examination, peripheral blood smear analysis, and targeted laboratory testing, including vitamin B12, folate, methylmalonic acid, and homocysteine levels. Management strategies for both nutritional and non-nutritional causes are detailed.

Results: Accurate diagnosis hinges on distinguishing between megaloblastic and nonmegaloblastic causes through morphological and biochemical assessment. Treatment is etiology-specific: vitamin B12 or folate repletion for deficiencies, and management of underlying conditions like hypothyroidism, liver disease, or alcohol use disorder for nonmegaloblastic cases. An interprofessional team approach is crucial for effective treatment, monitoring, and patient education.

Conclusion: Successful management of macrocytic anemia requires a systematic, collaborative approach to ensure accurate diagnosis, targeted treatment, and prevention of long-term sequelae, particularly the irreversible neurological damage associated with delayed B12 deficiency treatment.

Keywords: Macrocytic Anemia, Vitamin B12 Deficiency, Folate Deficiency, Megaloblastic Anemia, Interdisciplinary Care, Hematologic Diagnosis.

1. Introduction

Macrocytic anemia is a hematologic disorder characterized by the presence of abnormally large red blood cells (macrocytosis) and a mean corpuscular volume (MCV) greater than 100 femtoliters (fL) in the context of anemia. The definition of anemia varies slightly based on sex and physiological state: hemoglobin levels less than 13 g/dL or hematocrit less than 41% in males, less than 12 g/dL or hematocrit less

than 36% in nonpregnant females, and less than 11 g/dL in pregnant females are considered diagnostic thresholds. This classification emphasizes that macrocytosis alone is not sufficient for diagnosis unless accompanied by anemia, highlighting the need for a comprehensive hematologic evaluation to identify the underlying cause. Macrocytic anemia is broadly categorized into two main types—megaloblastic and nonmegaloblastic—based on the

underlying pathophysiology and peripheral smear findings. The megaloblastic form arises from defective DNA synthesis that leads to ineffective erythropoiesis and the production of large, immature red blood cells. This defect most commonly results from deficiencies in vitamin B12 (cobalamin) or folate (vitamin B9), both of which are essential cofactors in nucleotide synthesis. Morphologically, megaloblastic anemia is distinguished by macroovalocytes and hypersegmented neutrophils on peripheral blood smear. On the other hand, the nonmegaloblastic variant encompasses a heterogeneous group of conditions not primarily associated with impaired DNA synthesis. These may include alcohol use disorder, liver disease, hypothyroidism, myelodysplastic syndromes, reticulocytosis, and certain medications such as chemotherapeutic agents or antiretrovirals that alter erythrocyte membrane composition or bone marrow function.[1][2]

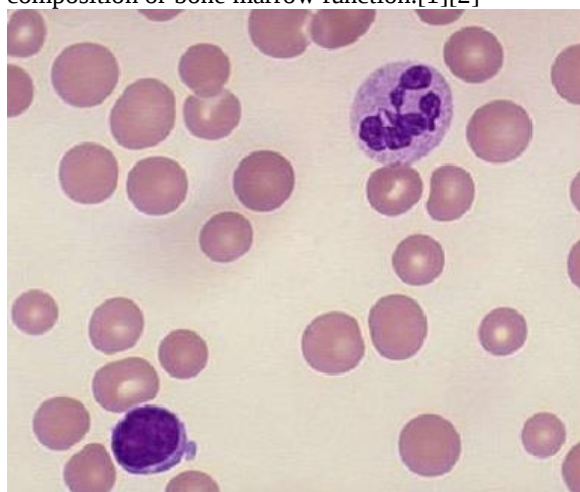


Figure-1: Blood film showed macrocytic anemia.

From a clinical perspective, macrocytic anemia presents a diagnostic challenge because of its wide differential diagnosis and overlapping symptoms. Common manifestations include fatigue, pallor, dyspnea, and tachycardia—reflecting tissue hypoxia secondary to anemia. However, specific etiologies may produce distinctive features, such as neurological deficits in vitamin B12 deficiency or glossitis and diarrhea in folate deficiency. Identifying the root cause is critical, as untreated megaloblastic anemia—particularly due to vitamin B12 deficiency—can lead to irreversible neurologic damage. The evaluation of macrocytic anemia requires an integrative approach, beginning with a detailed medical history and physical examination, followed by laboratory investigations such as a complete blood count (CBC), reticulocyte count, serum vitamin B12 and folate levels, liver function tests, and thyroid studies. Peripheral smear analysis remains a cornerstone for distinguishing megaloblastic from nonmegaloblastic forms. Given its multifactorial nature, macrocytic anemia demands collaboration among healthcare professionals—including family physicians, nurses, and pharmacists—to ensure

accurate diagnosis, targeted treatment, and effective patient education. Early recognition and management not only improve hematologic recovery but also prevent long-term complications associated with nutritional deficiencies or underlying systemic disease.

Etiology

Megaloblastic Anemia

Megaloblastic anemia arises when defects in nucleotide biosynthesis impair DNA replication, producing asynchronous nuclear–cytoplasmic maturation and ineffective erythropoiesis. The archetypal causes are folate and vitamin B12 deficiencies, which compromise one-carbon transfer reactions necessary for thymidylate and purine synthesis and thereby arrest rapidly dividing marrow precursors in S phase. Folate deficiency reflects decreased intake, increased utilization, or malabsorption. Diminished intake is classically encountered in malnutrition and alcohol use disorder, where poor diet quality and ethanol-mediated inhibition of intestinal folate transport synergize to deplete stores. Demand states such as hemolysis or pregnancy accelerate folate consumption and outstrip reserves unless supplementation is provided. Malabsorptive mechanisms range from congenital transporter defects to acquired conditions following gastric bypass; medications that bind bile acids or alter enterocyte transport, including cholestyramine and metformin, can further diminish bioavailability and precipitate macrocytosis in susceptible patients. Vitamin B12 deficiency follows analogous paths but has additional anatomic dependencies: adequate gastric acid and intrinsic factor secretion, intact pancreatic proteases, and an ileal surface capable of receptor-mediated uptake. Atrophic gastritis, whether autoimmune with parietal cell loss or nonautoimmune from chronic *Helicobacter pylori* infection, disrupts intrinsic factor and acid milieu; distal small bowel disease, ileal resection, or bacterial and parasitic competition, such as *Diphyllobothrium* infection, similarly abrogate absorption. Rarely, antagonists like nitrous oxide oxidize cobalamin and functionally inactivate methylcobalamin, precipitating acute megaloblastosis and neurologic decline. In this biochemical landscape, cytotoxic agents that interfere directly with DNA synthesis compound risk. Folic acid analogs such as methotrexate and trimethoprim-sulfamethoxazole inhibit dihydrofolate reductase or folate pathways; nucleic acid analogs including 5-fluorouracil impede thymidylate synthase; and other agents—hydroxyurea, pentamidine, phenytoin, pyrimethamine, sulfasalazine, and triamterene—perturb folate trafficking or ribonucleotide reduction. Clinically, red cell indices often drift upward before frank anemia emerges, and hypersegmented neutrophils on peripheral smear provide an early morphologic clue to the megaloblastic process. Intriguingly, in inflammatory arthritides treated with methotrexate, a rising mean corpuscular volume can

correlate with therapeutic response, reflecting on-target antifolate effects within proliferative immune compartments; however, the same signal may herald marrow toxicity, particularly in patients with baseline anemia or inadequate folate rescue, underscoring the need for vigilant laboratory monitoring and dose adjustment [3][4].

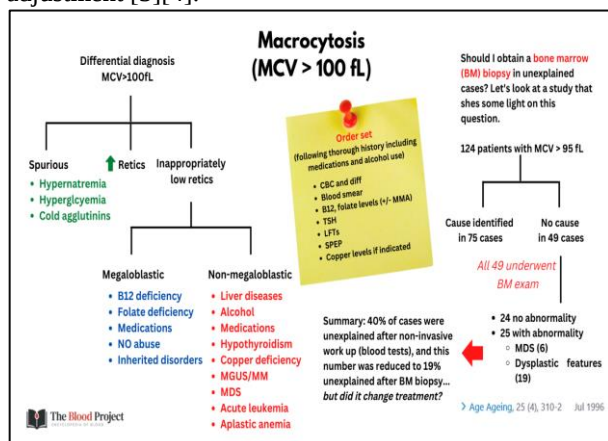


Figure-2: Etiology of macrocytic anemia.

Nonmegaloblastic Anemia

Nonmegaloblastic macrocytosis lacks the hallmark hypersegmented neutrophils and derives from mechanisms other than impaired thymidylate synthesis. Alcohol is the most common contributor worldwide; beyond nutritional deficiencies, ethanol and its metabolites exert direct marrow toxicity, alter membrane lipids, and reduce reticulocyte maturation, collectively enlarging circulating erythrocytes. Hepatic disease, irrespective of cause, enriches cholesterol and phospholipids in the red cell membrane, increasing surface area relative to volume and producing targetoid macrocytes on smear. Hypothyroidism slows erythropoiesis and shifts lipid composition in a similar direction, yielding modest macrocytosis that resolves with thyroid hormone replacement. Red blood cell toxicity from diverse xenobiotics, as well as hereditary spherocytosis, illustrates how membrane and volume regulation defects can modify cell size; in the latter, spherocytes are classically smaller but increased heterogeneity and reticulocytosis can elevate the mean corpuscular volume. States of brisk erythropoiesis, including hemolysis, acute blood loss, recovery from marrow suppression, pregnancy-associated turnover, or primary marrow disease, increase circulating reticulocytes, which are larger than mature erythrocytes and thereby raise the MCV without true megaloblastosis. These patterns emphasize that macrocytosis is a physiologic composite of membrane composition, reticulocyte kinetics, and marrow health; careful interpretation alongside reticulocyte counts, liver and thyroid studies, and medication review is essential to distinguish nutritional deficiency from systemic disease or drug effect [3].

Other Macrocytosis Etiologies

Macrocytosis also occurs as a normal variant or from genetic predisposition, reminding clinicians that a widened MCV is not invariably pathologic. Physiologic macrocytosis is well documented in healthy infants during pregnancy, and among individuals with trisomy 21, in whom baseline erythropoietic dynamics and membrane composition differ from typical controls [5]. At the molecular level, specific mutations have been linked to macrocytosis, including hypoxanthine-guanine phosphoribosyltransferase (HGPRT) deficiency in Lesch-Nyhan disease and variants in ALAS2 and KLF13 that alter heme synthesis or erythroid transcriptional programs, respectively [6][5][7]. In contemporary practice, clinicians must also recognize spurious macrocytosis due to analytic artifacts. Severe hyperglycemia transiently osmotically dilates erythrocytes in vitro, while leukocytosis and paraproteinemia increase sample turbidity and distort automated impedance or optical measurements. Preanalytical errors—prolonged sample standing at room temperature, partial clotting, or microclot occlusion of the analyzer aperture—likewise inflate the reported MCV; correlation with smear morphology and prompt repeat testing can prevent unnecessary workups [8][9].

Drug-induced extreme macrocytosis, with mean corpuscular volume exceeding 130 fL, is particularly associated with antiretroviral therapy regimens that include thymidine analogs such as zidovudine and stavudine, as well as lamivudine. In people living with HIV, rising MCV historically served as a pharmacodynamic marker of adherence and virologic response to highly active antiretroviral therapy; improvement of anemia with effective therapy may therefore be a favorable sign of marrow recovery from chronic inflammation and opportunistic infections. Nonetheless, nucleotide reverse transcriptase inhibitors can mimic megaloblastic physiology by perturbing mitochondrial and nuclear DNA synthesis, and, in patients who are concurrently malnourished or folate/B12 deficient, these agents may compound cytopenias and neuropathy risks, warranting nutritional assessment and supplementation where indicated [10]. Taken together, the etiologic spectrum of macrocytic anemia spans nutrient deficiency, systemic disease, marrow kinetics, pharmacology, genetics, and laboratory artifact. A structured approach that integrates dietary and gastrointestinal histories, medication inventories, alcohol and thyroid screening, hemolysis markers with reticulocyte indices, and confirmatory smear review allows clinicians to localize the mechanism—megaloblastic versus nonmegaloblastic—thereby directing definitive therapy and preventing irreversible complications such as cobalamin-related neurologic injury [3][4][5][6][7][8][9][10].

Epidemiology

Macrocytosis is encountered in approximately 2% to 4% of the general population, and an estimated 60% of affected individuals manifest concurrent anemia, underscoring that enlarged erythrocyte indices often coexist with impaired oxygen-carrying capacity rather than representing an isolated laboratory variant. Alcohol use remains the leading contributor worldwide, reflecting combined effects of poor dietary folate intake, direct marrow toxicity, and altered erythrocyte membrane composition. Following alcohol-related causes, nutritional deficiencies—particularly folate and vitamin B12—along with medication-induced macrocytosis constitute major etiologic categories across ambulatory and inpatient settings. The demographic distribution shows notable patterns: autoimmune mechanisms of vitamin B12 deficiency, including pernicious anemia, occur more frequently among middle-aged women, whereas hypothyroidism and primary bone marrow disorders account for a greater proportion of macrocytic anemia in older adults, paralleling age-related increases in thyroid dysfunction and clonal hematopoiesis. The prevalence of vitamin B12 deficiency rises substantially after the age of 60, driven by atrophic gastritis, reduced intrinsic factor production, polypharmacy that impairs absorption, and dietary changes common in later life [11].

Severity of macrocytosis provides additional epidemiologic and diagnostic context. Mild macrocytic anemia, commonly defined by a mean corpuscular volume between 100 and 110 fL, is more often associated with benign or reversible conditions such as alcohol exposure, early nutritional deficiency, hypothyroidism, liver disease, or medication effects. In contrast, marked macrocytosis with mean corpuscular volume exceeding 110 fL more strongly signals primary bone marrow pathology, megaloblastic anemia from folate or vitamin B12 deficiency, or drug-induced interference with DNA synthesis. This gradation in risk facilitates triage in primary care and hospital settings, where resource stewardship and timely referral depend on aligning pretest probability with the intensity of diagnostic evaluation. Population-level analyses also suggest geographic and socioeconomic influences, with higher burdens of nutritional deficiency-related macrocytosis in regions with limited food fortification or restricted access to animal-source foods, and a greater share of medication-related macrocytosis in health systems with broader use of chemotherapeutics, antimetabolites, or antiretroviral therapy. Collectively, these epidemiologic features emphasize the importance of age, sex, comorbidity, and exposure history when interpreting macrocytosis, while the distinction between mild and marked elevations in mean corpuscular volume serves as a practical heuristic to prioritize investigations for marrow

disease or megaloblastosis versus more common, reversible causes [12].

Pathophysiology

Macrocytic anemia is fundamentally defined by an increase in the mean corpuscular volume (MCV), which quantifies the average red blood cell (RBC) size. The mathematical expression $MCV (fL) = [Hematocrit (\%) \times 10] / RBC (10^6/\mu L)$ illustrates that macrocytosis represents larger-than-normal RBCs in proportion to the total erythrocyte count. The enlargement of these cells results from defective DNA synthesis during erythropoiesis, leading to asynchronous maturation between the nucleus and cytoplasm. In normal erythropoiesis, folate and vitamin B12 play indispensable roles in nucleic acid synthesis and methylation reactions necessary for cellular proliferation. When either of these cofactors is deficient, thymidylate and purine production is impaired, interrupting DNA replication and slowing nuclear maturation while cytoplasmic growth proceeds unhindered. Consequently, erythroid precursors develop into abnormally large cells with immature nuclei—termed megaloblasts—which, upon entering circulation, manifest as macrocytosis with hypersegmented neutrophils, characteristic of megaloblastic anemia [13]. In contrast, nonmegaloblastic macrocytic anemia arises through mechanisms unrelated to defective DNA synthesis. Instead, red cell enlargement occurs due to alterations in cell membrane lipid composition, increased reticulocyte populations (which are inherently larger than mature erythrocytes), or direct RBC toxicity. Common examples include liver disease, where cholesterol and phospholipid deposition within the RBC membrane increases surface area, and alcohol-induced macrocytosis, which combines marrow toxicity with altered lipid metabolism. Hypothyroidism and myelodysplastic syndromes may also result in nonmegaloblastic macrocytosis through reduced erythropoietic efficiency and abnormal bone marrow function.

Folate and vitamin B12 differ substantially in their physiological kinetics and storage. The daily folate requirement for an average adult is approximately 100–200 µg, with intestinal absorption capacity reaching 400 µg/day, primarily in the proximal small intestine. The body's total folate reserve suffices for roughly four months, meaning deficiency develops relatively quickly under conditions of inadequate intake or increased metabolic demand. Conversely, the daily vitamin B12 requirement is only about 1 µg, with absorption efficiency of 2–3 µg/day, but hepatic stores can last for several years. Vitamin B12 absorption is a complex, multi-step process requiring intrinsic factor (IF)—a glycoprotein secreted by gastric parietal cells—which binds cobalamin in the duodenum. This complex then attaches specific receptors in the terminal ileum, allowing absorption into the bloodstream. Disruption at any step—such as autoimmune destruction of

parietal cells (pernicious anemia), post-gastrectomy loss of intrinsic factor, pancreatic insufficiency, or ileal disease—can result in B12 deficiency and subsequent megaloblastosis [13]. Deficiency of folate or vitamin B12 impairs the conversion of homocysteine to methionine and the regeneration of tetrahydrofolate, both critical steps in DNA synthesis. The resulting accumulation of homocysteine and methylmalonic acid (in B12 deficiency) contributes not only to hematologic manifestations but also to systemic consequences, including endothelial dysfunction and neurological impairment. In the bone marrow, ineffective erythropoiesis leads to intramedullary destruction of erythroid precursors, explaining the paradox of elevated lactate dehydrogenase (LDH) and indirect bilirubin despite anemia. Ultimately, the pathophysiologic hallmark of macrocytic anemia lies in the discordance between cytoplasmic and nuclear maturation. When DNA synthesis is impaired—whether by nutrient deficiency, drug toxicity, or marrow disease—erythroblasts enlarge, leading to elevated MCV and a reduced capacity for oxygen transport. Understanding these mechanisms is essential for distinguishing between megaloblastic and nonmegaloblastic causes and for guiding targeted therapy, particularly since timely correction of vitamin B12 deficiency can prevent irreversible neurologic damage.

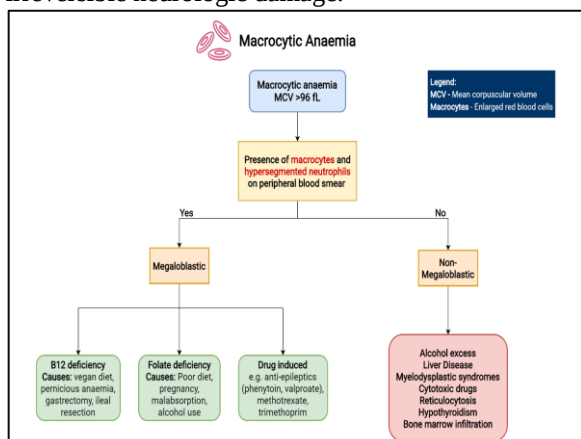


Figure-3: Pathophysiology of macrocytic anemia.

Histopathology

The histopathologic features of macrocytic anemia depend on whether the process is megaloblastic or nonmegaloblastic, with distinct morphological signatures in both the peripheral blood smear (PBS) and bone marrow. The differentiation between these two patterns is essential because it reflects fundamentally different pathophysiologic mechanisms—disordered DNA synthesis in megaloblastic anemia versus membrane or maturation abnormalities in nonmegaloblastic forms. In megaloblastic macrocytic anemia, the peripheral smear characteristically reveals macro-ovalocytes, which are enlarged, oval-shaped erythrocytes with diminished or absent central pallor, and hypersegmented neutrophils, defined as neutrophils

containing six or more nuclear lobes. These findings represent the hematologic hallmark of impaired nuclear maturation secondary to folate or vitamin B12 deficiency. The asynchronous maturation between the nucleus and cytoplasm, caused by defective DNA synthesis, results in large erythroid precursors with mature cytoplasmic hemoglobinization but immature, finely stippled nuclei. As a consequence, anisocytosis (variation in red cell size) and poikilocytosis (variation in shape) are common due to the ineffective erythropoiesis that leads to premature destruction of megaloblasts within the bone marrow. The degree of anisopoikilocytosis often correlates with the severity of deficiency and the duration of disease. On bone marrow examination, the typical picture is one of hypercellularity with increased numbers of erythroid precursors showing megaloblastic changes—large cells with open, sieve-like chromatin and abundant cytoplasm. Granulocytic precursors exhibit similar nuclear-cytoplasmic asynchrony, and giant metamyelocytes or band forms may be observed. Megakaryocytes may appear hyperlobated, further reflecting the generalized defect in DNA replication affecting all rapidly dividing marrow elements.

In contrast, nonmegaloblastic macrocytic anemia lacks nuclear hypersegmentation and macro-ovalocytes. Instead, the PBS demonstrates round macrocytes or macroreticulocytes, depending on the underlying etiology. For example, in liver disease, target cells and acanthocytes (spur cells with irregular projections) are commonly present due to cholesterol and phospholipid deposition within the erythrocyte membrane. In myelodysplastic syndromes, dysplastic myeloid and erythroid cells with irregular nuclear contours or multinucleation may dominate the smear, while in hemolytic states, fragmented schistocytes or spherocytes indicate intravascular destruction or membrane defects such as hereditary spherocytosis. When reticulocytosis is marked, polychromatophilic red cells—immature erythrocytes containing residual ribosomal RNA—impart a bluish or purple hue to the smear. This feature, termed polychromasia, reflects increased bone marrow activity and serves as a clue to hemolysis or recovery following acute blood loss. The bone marrow in nonmegaloblastic anemia may display variable cellularity depending on the cause. In alcohol-related macrocytosis, for example, the marrow may appear normocellular or mildly hypercellular, with vacuolated erythroid and granulocytic precursors but without megaloblastic changes. In hypothyroidism or chronic liver disease, the marrow often appears unremarkable apart from mild erythroid hyperplasia. Conversely, in primary bone marrow disorders such as myelodysplastic syndromes, there is clear evidence of dyserythropoiesis, nuclear budding, multinucleation, and irregular chromatin clumping. Overall, histopathologic examination remains a cornerstone of diagnosis in macrocytic anemia, guiding clinicians toward distinguishing nutritional deficiency from

marrow pathology or systemic disease. The presence or absence of hypersegmented neutrophils and macro-ovalocytes serves as a decisive morphologic discriminator, while the bone marrow picture corroborates the underlying mechanism of ineffective or compensatory erythropoiesis. By integrating peripheral and marrow morphology with clinical and biochemical findings, hematopathologists can accurately categorize the anemia type, ensuring that appropriate etiologic treatment—such as vitamin replacement, cessation of offending drugs, or management of marrow disorders—is promptly initiated.

History and Physical

The clinical presentation of macrocytic anemia varies widely depending on its underlying etiology, reflecting both the hematologic manifestations of anemia and the systemic features of the associated disorder. A detailed patient history and thorough physical examination are essential in identifying the causative factor and distinguishing between megaloblastic and nonmegaloblastic processes. The clinical features may be subtle in early disease but can become profound as the deficiency or marrow dysfunction progresses.

Clinical History

The history in patients with macrocytic anemia should begin with a comprehensive assessment of symptoms related to anemia, such as fatigue, pallor, dyspnea on exertion, and palpitations, but extend to identifying neurologic, gastrointestinal, or systemic features that help delineate the etiology. Vitamin B12 deficiency often presents with a combination of hematologic, gastrointestinal, and neurologic findings. Patients commonly describe neurologic disturbances, including paresthesias, numbness, gait instability, and loss of balance, which are manifestations of posterior column and corticospinal tract demyelination. More advanced cases may include memory loss, confusion, depression, or even frank dementia, as B12 is essential for myelin synthesis and neuronal integrity. Some patients experience mood disturbances or irritability before overt neurologic symptoms develop. The coexistence of fatigue, glossitis, and neuropsychiatric features is highly suggestive of B12 deficiency. A dietary history may reveal inadequate intake of animal products in vegans, while patients with malabsorptive disorders (eg, celiac disease, Crohn disease, or bacterial overgrowth) may have concomitant gastrointestinal complaints such as diarrhea or bloating. Similarly, a history of gastrectomy, gastric bypass, or ileal resection is significant, as these procedures disrupt intrinsic factor production or absorption of vitamin B12 in the terminal ileum. Folate deficiency typically mirrors the hematologic presentation of B12 deficiency—manifesting with fatigue, pallor, and glossitis—but lacks the neurologic and psychiatric disturbances. Folate deficiency often arises from poor dietary intake, chronic alcohol

consumption, malabsorption syndromes, or increased physiologic demand, such as pregnancy or chronic hemolysis. A social history may reveal alcohol overuse, “tea and toast” dietary patterns in the elderly, or medication use interfering with folate metabolism, including methotrexate, trimethoprim-sulfamethoxazole, and phenytoin.

Certain inherited conditions, such as Imerslund-Gräsbeck syndrome, an autosomal recessive disorder predominantly affecting individuals of Scandinavian descent, can lead to defective intestinal vitamin B12 absorption, resulting in early-onset megaloblastic anemia [14]. Additionally, reviewing the family history may uncover autoimmune disorders such as pernicious anemia, thyroid disease, or vitiligo, which commonly coexist due to shared autoimmune pathogenesis. Medication review is critical, as numerous drugs may induce macrocytosis by impairing DNA synthesis or interfering with folate and B12 metabolism. Chronic use of metformin, proton pump inhibitors, or H2 receptor antagonists reduces gastric acid secretion and impairs vitamin B12 absorption. Chemotherapeutic and antiretroviral agents can also cause macrocytosis, sometimes without overt anemia.

Physical Examination Findings

The physical examination provides essential diagnostic clues. General features of anemia—pallor of the conjunctiva, mucous membranes, and nail beds—are nonspecific but warrant further evaluation. In vitamin B12 deficiency, neurologic examination may reveal loss of vibration and position sense, ataxia, and a positive Romberg sign, reflecting dorsal column involvement. Advanced cases may present with spasticity, weakness, and hyperreflexia, suggesting corticospinal tract pathology. Early recognition of these findings is crucial, as neurologic deficits may become irreversible if treatment is delayed. Oral and mucosal changes are also common. Glossitis—a smooth, beefy-red tongue—is often seen in both B12 and folate deficiencies and may indicate autoimmune atrophic gastritis when associated with pernicious anemia. Angular cheilitis (fissuring at the corners of the mouth) may also be observed. Patients with chronic alcohol use may exhibit hepatomegaly, jaundice, or spider angiomas, while hepatosplenomegaly may suggest hemolytic anemia or bone marrow infiltration. In cases of autoimmune etiologies, vitiligo or other autoimmune stigmata may coexist. The physical examination must also assess thyroid enlargement or hypothyroid facies, particularly in older adults with unexplained macrocytosis. In individuals with suspected bone marrow disease, findings such as petechiae, ecchymoses, or lymphadenopathy may suggest pancytopenia or myelodysplastic syndromes. In summary, the history and physical examination in macrocytic anemia provide indispensable diagnostic information. The combination of systemic anemia symptoms, neurologic findings, and specific

mucocutaneous or organ-related signs often directs clinicians toward the underlying cause before laboratory confirmation. Early identification through a meticulous clinical evaluation allows for timely intervention—preventing irreversible neurologic injury, correcting nutritional deficiencies, and addressing any underlying systemic disease contributing to macrocytosis.

Evaluation

The evaluation of macrocytic anemia begins with a comprehensive history and physical examination, followed by targeted laboratory and diagnostic studies aimed at identifying the underlying cause. Since macrocytosis may arise from a broad range of etiologies—nutritional deficiencies, marrow disorders, systemic diseases, or medication effects—a stepwise and methodical diagnostic approach is crucial for accuracy and efficiency. The first step involves confirming the presence of macrocytosis, defined by a mean corpuscular volume (MCV) greater than 100 fL. However, reliance solely on red blood cell (RBC) indices can underestimate macrocytosis by up to 30%, because the MCV represents a mean value that may mask mixed populations of microcytic and macrocytic cells. Therefore, a peripheral blood smear (PBS) remains an indispensable diagnostic tool, offering qualitative insights into red cell morphology that automated counters cannot detect. The PBS allows identification of macro-ovalocytes, hypersegmented neutrophils, and anisopoikilocytosis—hallmarks of megaloblastic anemia—or alternatively, round macrocytes, target cells, and acanthocytes suggestive of nonmegaloblastic causes such as liver disease or alcohol toxicity. If the PBS lacks megaloblastic features, clinicians should proceed with evaluations for nonmegaloblastic etiologies, focusing on metabolic and endocrine disorders. Laboratory tests including serum aminotransferases and thyroid-stimulating hormone (TSH) should be ordered, as hepatic dysfunction and hypothyroidism are among the most common systemic contributors to macrocytic anemia. When PBS reveals megaloblastic changes, further investigation should focus on differentiating between vitamin B12 and folate deficiencies, the two principal nutritional causes [15].

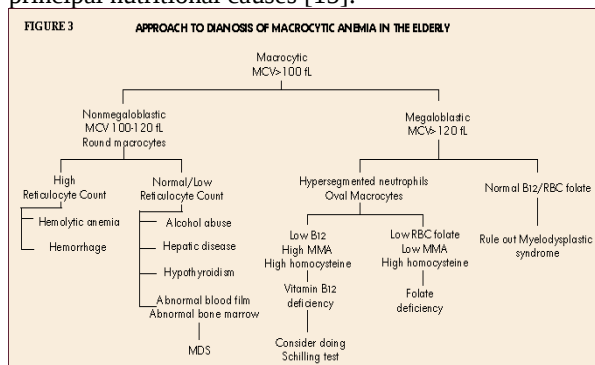


Figure-4: Evaluation of macrocytic anemia.

The reticulocyte count is an early, essential component of evaluation, as it helps determine the bone marrow response to anemia. A reticulocyte count <1% suggests decreased RBC production, consistent with nutritional deficiencies or marrow suppression, whereas a count >2% implies increased erythropoietic activity due to hemolysis or blood loss, prompting a hemolytic anemia workup (including lactate dehydrogenase, bilirubin, and haptoglobin). In cases of hyperproliferation, serum vitamin B12 levels should be obtained to assess for concurrent deficiency. Interpretation of B12 levels requires caution. A vitamin B12 concentration below 100 pg/mL is diagnostic of deficiency, while values above 400 pg/mL are typically normal. However, values in the borderline range (100–400 pg/mL) warrant further testing, as serum B12 measurements alone can miss up to 50% of true deficiencies [15]. In these intermediate cases, assessing methylmalonic acid (MMA) and homocysteine levels provides greater diagnostic specificity. Both metabolites accumulate in the absence of adequate cofactors—MMA rises exclusively in vitamin B12 deficiency, while homocysteine increases in both folate and B12 deficiencies. Elevated MMA with normal homocysteine strongly supports cobalamin deficiency, whereas isolated homocysteine elevation indicates folate deficiency.

If vitamin B12 exceeds 400 pg/mL but deficiency is still suspected clinically, an RBC folate level—rather than a serum folate level—should be obtained due to its superior sensitivity. Persistently normal B12 and folate values in the context of macrocytosis should prompt further hematologic evaluation. Bone marrow biopsy may be indicated to assess for myelodysplastic syndromes, leukemia, or other primary marrow disorders, particularly when the PBS shows abnormal myeloid morphology (eg, hypogranulated neutrophils, dysplastic nuclei, or cytopenias in multiple lineages). For cases where pernicious anemia is suspected, testing for anti-intrinsic factor and anti-parietal cell antibodies provides diagnostic confirmation. Historically, the Schilling test—which measured vitamin B12 absorption with and without intrinsic factor—was used to distinguish between malabsorption and autoimmune etiologies, but it has largely been discontinued due to technical complexity and limited availability [8][16]. Clinicians should also remain vigilant for mixed anemia, where concurrent iron deficiency and macrocytosis coexist. In such cases, the MCV may appear deceptively normal because the microcytosis of iron deficiency offsets the macrocytosis of megaloblastic changes. However, the red cell distribution width (RDW) will be elevated, reflecting heterogeneous RBC populations. In summary, the evaluation of macrocytic anemia requires an integrative diagnostic framework combining morphological assessment, biochemical

markers, and, when necessary, marrow examination. By sequentially analyzing PBS morphology, reticulocyte activity, vitamin and metabolic markers, and autoimmune indicators, clinicians can accurately identify the cause and initiate targeted treatment, preventing the neurologic sequelae and systemic complications associated with delayed diagnosis.

Treatment / Management

Macrocytic Anemia Management

The therapeutic strategy for macrocytic anemia is fundamentally etiologic—identify the driver and correct it—while providing timely hematologic support to reverse cytopenias and prevent irreversible complications. For megaloblastic causes, targeted repletion is the cornerstone. Folate deficiency is treated with folic acid 1 to 5 mg orally once daily, paired with counseling on a folate-rich diet that emphasizes fortified grains and leafy green vegetables. Prophylaxis is warranted in specific high-risk states: individuals receiving folate antagonists such as methotrexate or trimethoprim-sulfamethoxazole, and pregnant patients—particularly those with prior neural tube-affected pregnancies or taking enzyme-inducing antiepileptics—should receive daily supplementation throughout the period of risk. Crucially, clinicians must never assume isolated folate deficiency when macrocytosis is present; unrecognized vitamin B12 deficiency treated with folate alone may correct the anemia while allowing progressive, potentially irreversible neurologic injury. Vitamin B12 replacement should be instituted when deficiency is confirmed or strongly suspected. An effective oral regimen is 1000 µg daily for one month followed by 125 to 250 µg daily for maintenance; parenteral therapy with 1000 µg intramuscularly weekly for four weeks, then monthly, is preferred for pernicious anemia, post-bariatric surgery patients, or those with significant ileal disease or other malabsorptive conditions. Empiric folate 400 µg to 1 mg daily can be co-administered during cobalamin repletion when mixed deficiency is plausible. With adequate therapy, reticulocytosis typically peaks within 7 to 10 days, hemoglobin rises by 1 to 2 g/dL every two to three weeks, and anemia resolves over four to eight weeks. Neurologic manifestations of B12 deficiency improve more slowly and may be incomplete when treatment is delayed, which underscores the imperative to evaluate for cobalamin deficiency before or alongside folate therapy.

Nonmegaloblastic macrocytic anemia requires directed management of the underlying disorder. Alcohol-related macrocytosis generally normalizes with sustained abstinence and nutritional rehabilitation, including thiamine and folate support. Hypothyroid-associated macrocytosis resolves after restoration of euthyroidism with levothyroxine. Liver disease-related macrocytosis is addressed by optimizing the hepatic condition and abstaining from hepatotoxins. Hemolysis or recovery from acute blood loss produces macrocytosis via reticulocytosis;

management targets the precipitating cause and ensures adequate iron availability for accelerated erythropoiesis. In primary marrow disorders such as myelodysplastic syndromes, disease-directed therapies and transfusion support may be necessary, with hematology consultation guiding diagnostic bone marrow evaluation and treatment selection. Medication review is a continuous thread through management. Agents that impair folate or DNA synthesis—antimetabolites, certain antiepileptics, and antiretrovirals—may necessitate dose adjustment, folate rescue, or planned supplementation. Of note, macrocytosis can serve as a surrogate of adherence or on-target effect with drugs such as methotrexate and zidovudine; in these contexts, macrocytosis per se may not require intervention beyond ensuring nutritional sufficiency and monitoring for cytopenias [17][18]. In patients on metformin, proton pump inhibitors, or H2-receptor antagonists, clinicians should anticipate B12 depletion over time and screen or supplement as indicated.

Treatment Monitoring

During active correction, routine remeasurement of serum folate or B12 and their metabolites is generally unnecessary if the clinical and hematologic responses are appropriate. A pragmatic approach is to follow hemoglobin, reticulocyte count, and mean corpuscular volume trajectories; many clinicians obtain an annual complete blood count in those on long-term cobalamin therapy to ensure sustained hematologic stability. Where adherence is uncertain or biochemical confirmation is needed—such as in persistent symptoms, equivocal hematologic recovery, or complex comorbidities—assessment of methylmalonic acid and serum B12 can substantiate adequacy of cobalamin repletion and patient compliance [19]. Alcohol-related macrocytosis should diminish with abstinence over several weeks; persistent macrocytosis in this setting prompts reevaluation for concomitant deficiencies, hypothyroidism, or marrow disease. Supportive measures round out comprehensive care. Patients with severe anemia and hemodynamic instability may require transfusion while deficiency therapy takes effect, though transfusion targets should be individualized to comorbidity and symptoms. Concomitant iron deficiency can mask macrocytosis on automated indices; in such mixed pictures the red cell distribution width is typically elevated, and iron repletion should proceed alongside vitamin therapy to optimize erythropoietic recovery. Finally, structured patient education—covering the rationale for treatment, expected timelines of hematologic and neurologic improvement, dietary sources of folate and B12, alcohol cessation resources, and the importance of medication adherence—improves outcomes, reduces relapse, and aligns long-term prevention with the patient's clinical context [17][18][19].

Differential Diagnosis

A careful differential diagnosis is essential when evaluating macrocytic anemia, as multiple pathologies can converge on an elevated mean corpuscular volume through distinct mechanisms of erythropoietic failure, membrane remodeling, or reticulocyte kinetics. The clinical context, medication exposures, nutritional status, and comorbid disease burden help triage among megaloblastic and nonmegaloblastic processes, while targeted laboratory and morphologic data refine probability. Within this framework, several entities warrant particular attention because of their frequency, clinical consequences, or potential for reversibility with timely therapy. Folate deficiency anemia remains a leading cause of megaloblastic macrocytosis and illustrates the principle that demand–supply mismatch can precipitate cytopenias even when baseline stores are modestly adequate. A subset of patients develops a functional or facultative folate deficiency during high-demand states such as pregnancy or severe hemolysis, in which accelerated erythropoiesis increases folate utilization and exhausts reserves despite unaltered intake [20][21][22]. This pathophysiology underpins longstanding public health mandates for folate fortification of cereal products to reduce the incidence of neural tube defects, a complication directly linked to inadequate maternal folate during early embryogenesis [20]. Clinically, folate administration mitigates functional deficiency in hemolytic conditions, including sickle cell disease, by supporting expanded erythroid proliferation and thereby limiting megaloblastosis [21]. In infancy and early childhood, prevention and correction of folate deficiency reduces anemia and lowers serum homocysteine, plausibly decreasing later cardiovascular risk trajectories [22]. Distinguishing folate deficiency from vitamin B12 deficiency remains crucial because folate repletion will correct hematologic abnormalities while permitting progression of B12-related neurologic injury; thus, concurrent assessment of cobalamin status is imperative whenever folate therapy is contemplated [20][21].

Anemia due to liver disease exemplifies a multifactorial macrocytosis in which the megaloblastic and nonmegaloblastic axes intersect. In cirrhosis, anemia is highly prevalent, affecting up to three-quarters of patients, and often reflects a complex admixture of iron deficiency from gastrointestinal blood loss, hypersplenism with sequestration, nutritional deficiency, marrow suppression, and hemolysis [23][24]. Among macrocytic contributors, folate deficiency is present in roughly 40% and vitamin B12 deficiency in 30% to 40% of affected individuals, while alcohol use superimposes both direct marrow toxicity and impairment of folate and cobalamin metabolism [23]. Because B12 and folate coenzymes are required for thymidylate and purine biosynthesis, deficiencies delay nuclear maturation

and produce megaloblastic changes; concurrently, portal hypertension–related splenomegaly augments red cell sequestration and destruction, amplifying reticulocytosis and further increasing the MCV [24]. Liver disease also increases cholesterol deposition in erythrocyte membranes, expanding surface area and generating round macrocytes and target cells typical of nonmegaloblastic macrocytosis [24]. Notably, the degree of macrocytosis correlates with hepatic decompensation, serving as a crude gauge of disease severity in a population at risk for variceal hemorrhage, spontaneous bacterial peritonitis, encephalopathy, and jaundice; survival diverges sharply between compensated and decompensated cirrhosis, with five-year survival of roughly 84% and less than 35%, respectively [25].

Hypothyroidism introduces further diagnostic nuance because its anemia is most commonly normocytic, although macrocytic and microcytic patterns also occur, particularly in the presence of concomitant nutrient deficiencies or marrow suppression [26]. Thyroid hormone influences erythropoietin production and bone marrow proliferation; hypothyroidism reduces erythroid progenitor number and proliferative potential, and the marrow ground substance can undergo gelatinous transformation with mucopolysaccharide accumulation, compounding ineffective erythropoiesis [26]. Given the frequent co-occurrence of autoimmune disorders, vitamin B12 deficiency due to pernicious anemia may accompany hypothyroidism, especially in autoimmune thyroiditis, so simultaneous assessment of B12 and folate is recommended when macrocytosis coexists with an elevated red cell distribution width in the absence of iron deficiency [27][26]. Clinicians should also consider thyroid dysfunction in treatment-refractory or recurrent anemia that lacks a clear alternative explanation [26]. Myelodysplastic syndromes occupy a critical place in the differential because they can mimic megaloblastic anemia while requiring entirely different therapeutic pathways. Although an MCV above 100 fL evokes megaloblastosis, overlapping morphologic abnormalities may obscure the diagnosis and misdirect clinicians toward MDS, or conversely, delay recognition of clonal marrow disease [28][22]. Clues favoring MDS include cytogenetic aberrations, evidence of clonality, and bilineage cytopenias, along with granulocytic hyposegmentation or hypogranulation, megakaryocytic hypolobulation, hypogranular platelets, and increased blasts on marrow examination [28]. That said, leukopenia and thrombocytopenia can also appear in megaloblastic anemia, and bone marrow in deficiency states often exhibits hypercellularity, nuclear–cytoplasmic dyssynchrony in erythroid precursors, giant metamyelocytes and bands, hyperpigmented neutrophils, and hyperlobulated megakaryocytes—features that can cloak the correct diagnosis if

biochemical confirmation of folate or B12 deficiency is not pursued [22][28]. Elevated lactate dehydrogenase and low haptoglobin, reflecting intramedullary hemolysis, further complicate the picture; integrating metabolite testing with morphologic assessment helps prevent misclassification.

Alcohol use disorder is both a cause and a confounder of macrocytosis, producing megaloblastic anemia through folate deficiency and a nonmegaloblastic macrocytosis via direct ethanol toxicity on erythroid precursors—mechanisms that are frequently simultaneous and reversible with abstinence [29][30]. Hepatic folate stores are substantial, and additional deposits exist in connective tissue, erythrocytes, kidneys, and the gastrointestinal tract; however, chronic alcohol exposure depletes these reserves through reduced intake, impaired absorption, and increased utilization [29]. Approximately one in four patients with megaloblastic anemia demonstrate low serum folate, and a smaller fraction have low tissue deposits, while ringed sideroblasts and sideroblastic changes are well-recognized marrow features in alcohol-related disease [30]. Importantly, alternative drivers of folate deficiency may coexist in individuals with alcohol use disorder, including cancer with heightened folate demand, dialysis-related losses, malabsorption, and drug effects from antiepileptic medications or metformin, as well as impaired hepatic uptake that yields scanty hepatic stores [29]. Sustained abstinence allows reversal of direct marrow toxicity and, with nutritional rehabilitation, permits macrocytosis to recede without pharmacologic intervention in many cases [30]. Across these entities, the overarching diagnostic goal is to allocate macrocytosis to its dominant mechanism—nutritional deficiency, systemic disease, marrow failure, toxin, or pharmacologic effect—while maintaining vigilance for mixed pictures. The presence of neurologic symptoms, autoimmune stigmata, liver disease markers, thyroid dysfunction, bilineage cytopenias, or a history of alcohol misuse can each reweight the pretest probability and guide confirmatory testing. Peripheral smear morphology, reticulocyte indices, homocysteine and methylmalonic acid, liver and thyroid panels, and, when necessary, bone marrow examination together resolve ambiguity and prevent therapeutic missteps, such as folate-only treatment in unrecognized cobalamin deficiency or delayed referral in occult MDS [20-30].

Complications

Chronic megaloblastic anemia due to vitamin B12 deficiency can lead to irreversible neurological injury, classically termed subacute combined degeneration of the spinal cord. Demyelination involves the dorsal columns and lateral corticospinal tracts, producing a constellation of sensory ataxia, impaired vibration and position sense, spasticity, and gait disturbance; cognitive decline, memory loss,

mood changes, and frank psychiatric syndromes may coexist. Peripheral neuropathy, often with paresthesias and distal weakness, adds to disability. Because hematologic abnormalities may precede, coincide with, or even follow neurological manifestations, delayed recognition can culminate in permanent deficits despite hematologic correction. Folate deficiency does not cause the same neurodegenerative profile but is linked to glossitis, mucosal changes, and—in pregnancy—elevated risk of fetal neural tube defects; severe or prolonged folate deficiency may also exacerbate hyperhomocysteinemia, a putative risk factor for endothelial dysfunction and thrombosis. Beyond nutrient deficiency per se, macrocytic anemia frequently reflects systemic disease (eg, hypothyroidism, liver disease, alcohol use disorder, myelodysplastic syndromes), so complications often mirror the natural history of the underlying condition: portal hypertension and variceal bleeding in cirrhosis, heart failure exacerbation in advanced anemia, or infectious and bleeding risks in marrow failure. Hemolysis or ineffective erythropoiesis can produce indirect hyperbilirubinemia and gallstone disease; severe anemia may provoke high-output cardiac failure, angina, or arrhythmias in patients with limited cardiopulmonary reserve. Transfusion—occasionally required as a bridge while deficiency is corrected—carries its own risks, including alloimmunization, transfusion-associated circulatory overload, and iron overload with repeated exposure. Misclassification is an additional hazard: empiric folate alone can mask hematologic indices while neurological injury from occult B12 deficiency progresses, and failure to recognize clonal marrow disease may delay disease-modifying therapy.

Deterrence and Patient Education

Effective prevention rests on identifying at-risk populations, addressing modifiable drivers, and ensuring timely supplementation. Patients should understand that macrocytic anemia reflects impaired red blood cell production, most commonly from inadequate folate or vitamin B12 intake/absorption or from conditions that increase demand beyond available stores. Counseling should emphasize dietary sources—leafy green vegetables, legumes, and fortified cereals for folate; animal products such as meat, fish, eggs, and dairy for B12—and the particular vulnerability of strict vegans, older adults with atrophic gastritis, and individuals with malabsorptive disorders or post-bariatric surgery. Medication review is instructive: metformin, proton pump inhibitors, and H2 receptor antagonists can reduce B12 absorption over time; antifolate agents (eg, methotrexate, trimethoprim-sulfamethoxazole), certain antiepileptics, and some antiretrovirals may increase folate requirements or perturb DNA synthesis. Patients with alcohol use disorder benefit from structured cessation support and nutrition rehabilitation, including thiamine alongside folate. Preconception and antenatal counseling should highlight daily folic

acid supplementation to prevent neural tube defects, with higher doses for women with prior affected pregnancies or concurrent antiepileptic use. Education should normalize symptom reporting—fatigue, exertional dyspnea, glossitis, numbness, unsteady gait, or mood/cognitive changes—and reinforce the importance of laboratory follow-up. Clinicians can explain expected recovery timelines: reticulocytosis within 1 to 2 weeks of repletion, hemoglobin rise over 4 to 8 weeks, and slower neurological improvement over months, which may be incomplete if treatment is delayed. Clear written plans for supplementation, diet, and medication adjustments, combined with reminders for periodic reassessment, reduce relapse and improve adherence.

Pearls and Other Issues

Several practical points can prevent morbidity. First, always evaluate for vitamin B12 deficiency before or alongside folate therapy; correcting folate alone can normalize hemoglobin while permitting irreversible neurological damage. Second, remember that a normal mean corpuscular volume does not exclude mixed anemia: concomitant iron deficiency may “normalize” the MCV while the red cell distribution width is elevated; the peripheral smear and reticulocyte indices help unmask such mixtures. Third, serum B12 levels can be misleading in the borderline range; methylmalonic acid and homocysteine provide biochemical resolution, with isolated elevation of methylmalonic acid pointing to B12 deficiency and homocysteine rising in both folate and B12 deficiencies. Fourth, mild macrocytosis can be drug-related or reflect alcohol exposure and may not need intervention beyond addressing the precipitant and ensuring nutritional adequacy. Fifth, persistent or unexplained macrocytosis with cytopenias warrants hematology referral to evaluating for myelodysplastic syndromes or other clonal marrow disorders. Finally, improvement in macrocytosis with abstinence or appropriate endocrine/hepatic therapy often corroborates the suspected etiology and reassures patients that adherence yields tangible hematologic benefits.

Enhancing Healthcare Team Outcomes

Optimal care for macrocytic anemia depends on coordinated interprofessional practice that aligns diagnostic precision with patient-centered management. Physicians and advanced practitioners synthesize history, examination, and laboratory data to identify the mechanism—megaloblastic versus nonmegaloblastic—and to map a causal pathway that can be corrected. Embedding reflex testing algorithms in the laboratory information system (eg, automatic methylmalonic acid and homocysteine measurements for borderline serum B12) streamlines diagnosis and reduces missed deficiencies. Nurses play a crucial role in screening for symptoms, administering parenteral cobalamin when indicated, reinforcing adherence to oral regimens, and monitoring for adverse effects or

treatment failure; their education on diet, alcohol reduction, and medication timing (eg, spacing calcium/iron away from certain drugs) enhances uptake. Pharmacists review medication lists for agents that impair folate or B12 metabolism, recommend dose modifications or rescue strategies (folinic acid with methotrexate), counsel on potential interactions, and set schedules for replenishment. Dietitians translate therapeutic goals into practical meal plans tailored to cultural preferences, resource constraints, and comorbidities, while social workers address food insecurity, transportation barriers, and substance use, facilitating access to fortified foods and supplements. Laboratory professionals ensure high-quality smear preparation, automated indices, and timely reporting of critical values; they can flag spurious macrocytosis due to preanalytical artifacts or sample interference, prompting confirmatory review. Care pathways that include electronic prompts for at-risk groups—older adults on metformin or acid suppression, post-bariatric surgery patients, vegans, individuals with inflammatory bowel disease or celiac disease, and those with chronic alcohol use—support proactive screening and earlier intervention. Transfusion stewardship programs help manage severe symptomatic anemia while definitive therapy takes effect, minimizing exposure risks. Regular case conferences that review difficult presentations (eg, mixed anemia, suspected MDS, or treatment-refractory macrocytosis) foster shared learning and reduce diagnostic delay. Finally, structured follow-up with clear thresholds for reassessment—lack of reticulocyte response by two weeks, inadequate hemoglobin rise by one month or persisting neurological symptoms—ensures early detection of nonadherence, ongoing losses, malabsorption, or alternative pathology. Through deliberate communication and role clarity, the interprofessional team can reduce preventable complications, improve functional outcomes, and deliver equitable, high-quality care to patients with macrocytic anemia.

Conclusion:

In conclusion, macrocytic anemia is a complex disorder with diverse etiologies that demand a meticulous and systematic diagnostic approach. The critical first step is distinguishing between megaloblastic causes, primarily vitamin B12 and folate deficiencies, and nonmegaloblastic causes, such as liver disease, hypothyroidism, and medication effects. This differentiation, achieved through peripheral smear morphology and specific biochemical tests, is vital as it directly dictates management. Crucially, vitamin B12 deficiency must be identified or ruled out before initiating folate therapy to prevent the masking of hematological signs while allowing irreversible neurological damage to progress. Effective management extends beyond simple nutrient repletion, requiring an interdisciplinary strategy. Physicians establish the

diagnosis and treatment plan, nurses provide administration, monitoring, and education, and pharmacists review medications for potential causes and ensure therapeutic efficacy. This collaborative model, combined with targeted patient education on diet, medication adherence, and symptom recognition, ensures comprehensive care. Ultimately, a coordinated, team-based approach is fundamental to achieving accurate diagnosis, delivering targeted treatment, and improving long-term patient outcomes by preventing the severe complications associated with this condition.

References:

1. Lanier JB, Park JJ, Callahan RC. Anemia in Older Adults. *Am Fam Physician*. 2018 Oct 01;98(7):437-442.
2. Válka J, Čermák J. [Differential diagnosis of anemia]. *Vnitr Lek*. 2018 Summer;64(5):468-475.
3. Wolffenbittel BHR, McCaddon A, Ahmadi KR, Green R. A Brief Overview of the Diagnosis and Treatment of Cobalamin (B12) Deficiency. *Food Nutr Bull*. 2024 Jun;45(1_suppl):S40-S49.
4. Baek IW, Park KS, Kim KJ. An erythrocyte macrocytosis by methotrexate is associated with early initiation of biologic or targeted synthetic agents in patients with rheumatoid arthritis. *J Rheum Dis*. 2025 Jan 01;32(1):30-37.
5. Cakmakli HF, Torres RJ, Menendez A, Yalcin-Cakmakli G, Porter CC, Puig JG, Jinnah HA. Macrocytic anemia in Lesch-Nyhan disease and its variants. *Genet Med*. 2019 Feb;21(2):353-360.
6. Sankaran VG, Ulirsch JC, Tchaikovskii V, Ludwig LS, Wakabayashi A, Kadirvel S, Lindsley RC, Bejar R, Shi J, Lovitch SB, Bishop DF, Steensma DP. X-linked macrocytic dyserythropoietic anemia in females with an ALAS2 mutation. *J Clin Invest*. 2015 Apr;125(4):1665-9.
7. Spielmann M, Reichelt G, Hertzberg C, Trimborn M, Mundlos S, Horn D, Klopocki E. Homozygous deletion of chromosome 15q13.3 including CHRNA7 causes severe mental retardation, seizures, muscular hypotonia, and the loss of KLF13 and TRPM1 potentially cause macrocytosis and congenital retinal dysfunction in siblings. *Eur J Med Genet*. 2011 Jul-Aug;54(4):e441-5.
8. Phillips J, Henderson AC. Hemolytic Anemia: Evaluation and Differential Diagnosis. *Am Fam Physician*. 2018 Sep 15;98(6):354-361
9. Turner J, Parsi M, Badireddy M. StatPearls [Internet]. StatPearls Publishing; Treasure Island (FL): Aug 8, 2023. Anemia.
10. Ezeamama AE, Sikorskii A, Bajwa RK, Tuke R, Kyeyune RB, Fenton JJ, Guwatudde D, Fawzi WW. Evolution of Anemia Types During Antiretroviral Therapy-Implications for Treatment Outcomes and Quality of Life Among HIV-Infected Adults. *Nutrients*. 2019 Mar 31;11(4)
11. Arshad M, Jaberian S, Pazouki A, Riazi S, Rangraz MA, Mokhber S. Iron deficiency anemia and megaloblastic anemia in obese patients. *Rom J Intern Med*. 2017 Mar 01;55(1):3-7.
12. Stouten K, Riedl JA, Droogendijk J, Castel R, van Rosmalen J, van Houten RJ, Berendes P, Sonneveld P, Levin MD. Prevalence of potential underlying aetiology of macrocytic anaemia in Dutch general practice. *BMC Fam Pract*. 2016 Aug 19;17(1):113.
13. Oo TH, Rojas-Hernandez CM. Challenging clinical presentations of pernicious anemia. *Discov Med*. 2017 Sep;24(131):107-115.
14. Gräsbeck R. Imerslund-Gräsbeck syndrome (selective vitamin B(12) malabsorption with proteinuria). *Orphanet J Rare Dis*. 2006 May 19;1:17.
15. Iltar U, Göçer M, Kurtoğlu E. False elevations of vitamin B12 levels due to assay errors in a patient with pernicious anemia. *Blood Res*. 2019 Jun;54(2):149-151.
16. Long B, Koyfman A. Emergency Medicine Evaluation and Management of Anemia. *Emerg Med Clin North Am*. 2018 Aug;36(3):609-630.
17. Nagao T, Hirokawa M. Diagnosis and treatment of macrocytic anemias in adults. *J Gen Fam Med*. 2017 Oct;18(5):200-204.
18. Green R, Datta Mitra A. Megaloblastic Anemias: Nutritional and Other Causes. *Med Clin North Am*. 2017 Mar;101(2):297-317
19. Khara S, Dhingra S. Co-existing Iron Deficiency and Compliance Issues in Nutritional Macrocytic Anemia in Children. *Indian Pediatr*. 2023 Feb 15;60(1):152.
20. Ismail S, Eljazzar S, Ganji V. Intended and Unintended Benefits of Folic Acid Fortification-A Narrative Review. *Foods*. 2023 Apr 11;12(8)
21. Williams BA, McCartney H, Adams E, Devlin AM, Singer J, Vercauteren S, Wu JK, Karakochuk CD. Folic acid supplementation in children with sickle cell disease: study protocol for a double-blind randomized cross-over trial. *Trials*. 2020 Jun 29;21(1):593.
22. Socha DS, DeSouza SI, Flagg A, Sekeres M, Rogers HJ. Severe megaloblastic anemia: Vitamin deficiency and other causes. *Cleve Clin J Med*. 2020 Mar;87(3):153-164.
23. Manrai M, Dawra S, Kapoor R, Srivastava S, Singh A. Anemia in cirrhosis: An underestimated entity. *World J Clin Cases*. 2022 Jan 21;10(3):777-789.
24. Yang J, Yan B, Yang L, Li H, Fan Y, Zhu F, Zheng J, Ma X. Macrocytic anemia is associated with the severity of liver impairment in patients with hepatitis B virus-related decompensated cirrhosis: a retrospective cross-sectional study. *BMC Gastroenterol*. 2018 Nov 01;18(1):161.

25. Zhao TY, Cong QW, Liu F, Yao LY, Zhu Y. Nonlinear Relationship Between Macrocytic Anemia and Decompensated Hepatitis B Virus Associated Cirrhosis: A Population-Based Cross-Sectional Study. *Front Pharmacol.* 2021;12:755625.
26. Szczepanek-Parulska E, Hernik A, Ruchała M. Anemia in thyroid diseases. *Pol Arch Intern Med.* 2017 May 31;127(5):352-360.
27. Aktaş HŞ. Vitamin B12 and Vitamin D Levels in Patients with Autoimmune Hypothyroidism and Their Correlation with Anti-Thyroid Peroxidase Antibodies. *Med Princ Pract.* 2020;29(4):364-370.
28. Diamantopoulos PT, Solomou E, Symeonidis A, Pappa V, Kotsianidis I, Galanopoulos A, Pontikoglou C, Anagnostopoulos A, Vassilopoulos G, Zikos P, Hatzimichael E, Papaioannou M, Megalakaki A, Vassilakopoulos T, Dimou M, Tsokanas D, Papoutselis MK, Papageorgiou S, Kourakli A, Papadaki H, Panayiotidis P, Viniou NA. The prognostic significance of macrocytosis in patients with myelodysplastic neoplasms. *Am J Hematol.* 2023 May;98(5):E119-E122.
29. Sanvisens A, Zuluaga P, Pineda M, Fuster D, Bolao F, Juncà J, Tor J, Muga R. Folate deficiency in patients seeking treatment of alcohol use disorder. *Drug Alcohol Depend.* 2017 Nov 01;180:417-422.
30. Imashuku S, Kudo N, Kaneda S. Spontaneous resolution of macrocytic anemia: old disease revisited. *J Blood Med.* 2012;3:45-7.