Med Sync

YOUR STEP-BY-STEP QUICK REFERENCE GUIDE

Health Mart
PHARMACY

Med Sync: Your Step-by-Step Quick Reference Guide

The Med Sync Guide provides a simple, five-step process to implement a medication synchronization program at your pharmacy. For each step, there is a corresponding tool to provide a quick reference as the pharmacy team is initiating the program. This guide is recommended as an on-the-job tool as it provides a quick summary of the details for each step.

The Medication Synchronization Process

1 Identification and Recruitment → 2 Selection of Medications → 3 Alignment of Medications → 4 Appointment → 5 Maintenance

Step 1: Patient Identification and Recruitment

This quick guide allows you to identify eligible patients as well as provides a structured approach for prioritizing patients. This approach will evolve over time, and the tool keeps you focused as a new or experienced med sync team. Talking points for enrolling patients are also provided.

Step 2: Selection of Medications

Selecting the right medications to sync can seem daunting at first. This quick guide will provide confidence as you are reviewing a patient's medication profile. A three-step process for medication selection is reviewed. Which medications to synchronize as well as those to avoid are listed for an at-a-glance reminder.

Step 3: Alignment of Medications

Once the medications are selected, you'll need to choose a sync date and complete short fills. These steps are outlined and details such as short fill codes are captured on this tool. You'll also have access to a quick summary of key follow-up needs.

Step 4: The Appointment

An effective appointment with the patient is key to driving the financial and clinical benefits of med sync. Both appointment preparation and conducting an actual med sync appointment are outlined in this tool.

Step 5: Maintenance

Once the appointment is complete, it is crucial that patients are maintained through key steps. Routine steps are a must to be successful. This tool reviews the needed steps as well as guidelines for team roles to ensure patients stay on sync.

Step 1: Patient Identification and Recruitment

Who Is Eligible?

Any patient who would benefit from a monthly appointment is eligible. However, it is recommended to narrow the list and focus on specific subsets of patient when the med sync program is starting. Begin by focusing on the prioritized list to the right.

How can the team ensure success?

- Follow the steps for patient identification and recruitment provided to the right.
- Set, monitor and reward goals as a team

TIP

Start with patients who take only three to five maintenance medications for chronic conditions

TIP: While tempting, don't select the most complicated patient with the most medications when first starting your med sync program — gain experience first before enrolling these patients.

Patients with whom you have an existing relationship

TIP: Working with patients you know is an easy way to gain confidence and establish a comfort level with the processes, communications and routines needed to be successful.

Patient Identification

1. *Patients with four or more maintenance medications for chronic conditions.*
2. *Store needs:*
   - Increasing revenue:
     a. Nonadherent patients
     b. Patients that are part of a pay-for-performance program
   - Streamlining delivery patients
   - Improving performance measures
3. *Other methods to filter patients into med sync:*
   - Patients who have upcoming refills (proactive method)
     – Review will-call bins and attach a flyer or make a notation on the will-call bag
   - Patients by disease state

How do you find these patients?

- Use med sync technology reports for lists of patients that are in this category
- Out-window identification and manual refill call-ins (easiest method!)
  a. Allows practice at discussing program, which is crucial to success
  b. Add on as workflow and staffing allows — builds the team and standard in your pharmacy
  c. See recruitment section for talking points

Patient Recruitment

GOAL: In your first week, the team should offer medication synchronization to at least five patients a day.

Keep in mind, eventually this will become something you recommend to almost all your patients.

Methods of recruitment

1. *Established relationships*
   a. Focus most of your patient recruitment here the first week to help the team gain confidence
   b. Call patients directly or ask as they are in your pharmacy
2. *No relationship yet established*
   a. Offer med sync as they are picking up or calling in refills
   b. Attach a note to the prescription bag for will-call if patient is discovered to be a candidate during filling process

TIP

Cashiers and clerks are key to recruiting patients. They interact daily with patients refilling and picking up prescriptions. Ensure they are asking patients to participate utilizing the talking points to the right.

Talking Points

“

Employ the talking points below to recruit patients into your medication synchronization program.

> “Would you like to pick up (or have delivered) all of your medications for the month at once?”
>
> “We offer a service where you are able to pick up (or have delivered) all of your medications once monthly; this will allow you to avoid multiple trips to the pharmacy each month. Can I get you set up now?”
>
> “I think you would benefit from an established monthly visit at the pharmacy, where you can pick up all of your refills and any new medications during this set appointment date. You'll be able to cut down on your visits to the pharmacy each month and have the chance to talk one-on-one with the pharmacist each time you pick up your mediations.”
>
> “Would you like to avoid partial fills and decrease the number of trips to the pharmacy each month? Let me tell you about an option to pick up or have delivered all of your monthly prescriptions at one time through a quick appointment with the pharmacist.”

AVOID THESE PHRASES:

The phrases below are not descriptive to patients and caregivers. Mentioning the program instead of the value it offers or the problem it solves for the patient (or caregiver) will likely not result in successful enrollments.

> “Do you want to enroll in our new medication synchronization program?”
>
> “Do you want to enroll in our new pharmacy program?”

”

Step 2: Selection of Medications

Identifying medications to include on med sync

Review of Medication Profile

Which medications should be included in medication synchronization?

Ideally, all chronic maintenance medications are included. However, there are some considerations to take into account. Discuss which medications to synchronize with the patient. This should be an agreed upon decision, with pharmacy advice offered.

Use the list below to assist in selecting the medications to synchronize.

Medications typically *not* included in synchronization:

- Acute medications
  - Antibiotics or pain medications
- As-needed medications
  - Rescue inhalers, pain medications
- Eye drops, ointments and creams
- Drug that frequently change dosage
  - Coumadin or insulin

TIP

Packaged medications may potentially be added to a sync schedule

- May need to be the “anchor medication” (see page 7)
- May also dictate the sync interval if a 28-day package (e.g., Fosamax, birth control)

Consider the Cycle Day

Why cycle day matters in medication selection

Consider the cycle day when looking at medications for synchronization and in preparation for setting the appointment date. It is a good practice to consider both when enrolling the patient.

All options below are acceptable, and should be discussed with the patient and based on their prescriptions and insurance co-pays.

CYCLE	RATIONALE
30 days	*For 30 days' supply medications and mix of 30- and 90-day supply*
90 days	*For 90 days' supply*
28 days	*For 28 days' supply or if the patient wants to come in on a static date — for example, Tuesday; also helpful if you are delivering to a particular area on a certain day of the week.*

TIP

The maximum clinical benefit is achieved with 28- to 30-day intervals for the cycle day. This helps remind patients to continue their medications and it allows the pharmacy team to identify actual and potential drug therapy problems. Additionally, at each pickup the pharmacist may offer services to benefit the patient's preventative health (e.g., CMRs, immunizations, health screenings). Cycle days of 90 days are only favored if cost considerations are the patient's highest priority.

Step 3:
Alignment of Medications

Select Medications to Sync

Review page 5 for detailed information.

- Review the prescription profile for maintenance medications.
- Select each prescription to activate it as a synchronization medication.

Select the Sync Date

To determine the sync interval: Review prescriptions for days' supply trends.

- The sync date is where all refills will be aligned to be filled. When a sync date is chosen based on a prescription's or prescriptions' next due date to be filled, those medications are referred to as an "anchor" medication.
- Look for the following challenges in order when considering the sync date.
  1. Review the medication profile for any prescriptions that are dispensed in unbreakable packages — those will most likely need to be the anchor medication.
  2. Review the medication profile for any prescriptions that have a high patient co-pay or pharmacy cost.
  3. Review the medication profile for prescriptions that will allow for the fewest short fills.

Complete Short Fills

Assess and fill each selected medication's necessary quantity to get to the selected sync date (short fill).

Decide when to fill the short quantities

- Complete short fills immediately if:
  - The patient is waiting in the pharmacy AND
  - The insurer prorates co-pays (all Medicare, and many commercial)
- Complete short fills as prescriptions are due .
  - Schedule the short fill to occur on a future date (if your pharmacy-management system allows)
  - Utilize the calendar binder (see page 9 for an example) to record script number and short quantity
  - Organize by date to fill
- Use override codes (see below).

TIP

When possible, choose the latest next fill date as the sync date for simplicity. So if there are next fill dates of 1st, 5th, 10th, and 15th of the month, select 15th.

TIP

Look for refills that are past due and adjust accordingly.

If multiple medications' next fill dates fall in close date ranges (+/- two to three days), combine them into one fill date.

Override Codes

CODE	NAME	PURPOSE	WHEN TO USE
SCC 47	Shortened Days' Supply Fill	To override rejects to prorate patient co-pays for the shortened days' supply	*When first setting a medication to a synchronization schedule*
SCC 48	Fill Subsequent to a Shortened Days' Supply Fill	To override the refill-too-soon reject after a first sync time shortened days' supply fill	*After the first sync short fill, when additional medication is needed*

Follow Up (Administrative and Communication Needs)

Notes

- Add a note in your pharmacy-management system under the patient's profile (such as in the patient name or notes sections) that the patient is now enrolled in the medication synchronization program.
- Add the appointment date to any paper-based calendar systems utilized in the pharmacy (if not using technology).

Files

- If any paper files are being used for calls or documentation, add the new patient's materials.

Communication

- Send a notice of enrollment and explanation of medication synchronization to the patient's primary prescribers.
- Inform the patient and/or caregiver of the process and changes, and that communication will help ensure all their medications are assessed prior to the appointment
  - One week before each appointment, the patient will receive a call (automated or manual) from the pharmacy team.
  - During this call, potential changes will be addressed.
  - This saves the patient (and pharmacy) time because prescription changes, issues, questions as well as out-of-stock or prior authorizations all occur prior to pickup, instead of at the pickup.

Provide:

- An overview of what to expect
- The timeline for communication from the pharmacy
- The appointment date verbally and written on an appointment card (back of the pharmacy business card works well)
- Any short fill details

TIP

PATIENT COMMUNICATION

If the patient previously received refill reminders or autofilled prescriptions from your pharmacy, remember to turn those off once the patient is enrolled in med sync so that they don't receive conflicting communication from the pharmacy.

Short Fill Calendar Binder Organization

Utilizing a short fill calendar binder can organize and streamline your short fill alignment process*

Tools Needed

- 3-ring binder
- 1–31 divider tabs (available at office supply stores)
- Tracking sheet (printable version on page 10)

Set Up

- Place the 1–31 divider tabs in the 3-ring binder
- Print off tracking sheets and place 2 copies of each behind each day

Process

Used when aligning prescriptions and the short fill must be scheduled for next fill date (cannot be filled now).

- Determine date prescription is due to be filled for short fill.
- Move up 1–2 days (if due on 10th of month, schedule for the 8th or 9th) — provides time to resolve any issues.
- Record on appropriate date:
  - Patient name
  - Rx number
  - Month to fill (useful when syncing 90-day prescriptions)
  - Days' supply to fill
- For fills: Each day go to corresponding date tab and complete short fills. Cross off when complete.

EXAMPLE OF BINDER SET UP

* If you are using certain technology platforms, a calendar binder may not be necessary.

DAY OF MONTH:			
PATIENT NAME	RX NUMBER	MONTH	DAYS' SUPPLY

Step 4: The Appointment

Appointment Preparation

GOALS:

- Proactively identify any medication therapy problems (for example, side effects, technique)
- Improve patient adherence and safety
- Increase patient loyalty and enhance pharmacist-patient relationship
- Identify opportunities to maximize patient therapy (immunizations, CMR, screenings, etc.)

Location

Decide on a location for med sync appointments.

- Assess the pharmacy space.
  - Is there room to complete an appointment at the pickup window?
- Consider implications of waiting customers and pickups presenting during this time.
  - Is there a private/semi-private location in the pharmacy the patient/caregiver and pharmacist can meet for the appointment?
  - May assist when adding on services to med sync appointments (CMRs, health screenings, etc.)

Communication and actions

GOALS:

- To confirm medications for the fill date
- Find and resolve barriers to fills, and take time to resolve issues and order medications
- Evaluate therapy and adherence, and identify opportunities to maximize therapy

Seven to tend days prior to the appointment

- Proactively reach out to the patient via phone call.

  This is the time to assess the following through a patient discussion:
  - All changes to medications
  - The addition of any new medications or the discontinuation of a medication
  - Any hospital visit or physician appointments since the last medication fill
  - Need for prn medications if necessary (those that are not on the sync record)
- Medications may be confirmed via an automated call. If not, place a manual call to the patient and use the assessment checklist above.

Pharmacy responsibilities

1. Place any calls scheduled to be manual and occur outside the automated system.
2. Review the patient's profile for any intervention opportunities.
   a. Consider any gaps in care, immunization needs or CMRs
   b. If the pharmacist determines a need for additional clinical review or services at the appointment:
      i. Inform the patient the appointment may last longer
      ii. Schedule time for the pharmacist to conduct the appointment

Five days prior to the appointment
Manual tasks
1. Fill the synced prescriptions in pharmacy-management system.
   a. Determined based on patient's med synced prescriptions and patient conversation seven days out
   b. If paper based, check off each one once completed
   c. If technology based, leverage printout (or direct push to pharmacy-management system) to ensure completion

Pharmacy responsibilities
1. Resolve any prior authorizations and refill issues.
2. Order medications as needed.

One day before the appointment
Confirmation call
- Reminds the patient of appointment date.
- Instructs the patient to bring any questions or concerns to discuss with the pharmacist.
- Asks the patient to reschedule if they are not available.
- Manual task if paper based.
- Technology — automated reminder call occurs.

Conducting the Med Sync Appointment

Time required for appointment
Generally, if uncomplicated, the appointment time is under five minutes. The first appointment with a patient may be slightly longer. If there are additional services provided (CMR, immunizations, etc.) the appointment will take longer and should be planned and communicated accordingly.

Conducting the appointment
Discussion points
1. If adherence was identified as an opportunity — assess why.
   a. Key behavioral questions to ask patient:
      i. How do you feel about the cost of this medication?
      ii. What side effects are you experiencing from these medications?
      iii. How well do you think this medication is working for you?
2. Review technique for inhalers, eye drops, creams, etc. (even on refills!).
3. Ask about any concerns the patient may have regarding their medications or health.
4. Ask about recent visits to any healthcare provider.

Closing the appointment
1. Remind the patient they are still able to call with any questions.
2. Share appointment reminder for the next visit.

After the appointment
1. Documentation as needed.
2. Follow up as needed with prescribers.

Step 5: Maintenance

Establish New Daily Routines — Key to Success for Any Med Sync Program

1. Check calendars daily for scripts to fill.
2. Check short fill binder daily for any fills due (if applicable).
3. Complete appointment prep for any pending appointments.

Maintaining Enrolled Patients

Create and use calendars
- Med sync technology platform or store-created paper-based calendar to track and indicate appointment date for each patient.
- Store schedule.
  - Ensure a staff member is assigned to med sync each day (enrollment and fills)
- Rotate staff to ensure cross-training.
  - Update med sync profile
- Add any new maintenance meds to sync list.

Routine maintenance
- Program champion (ideally a lead technician).
  - Perform a daily check to see if patients scheduled to pick up the previous day did, in fact, pick up their meds
  - Reschedule patients who missed their pickup appointment
- Workflow technicians.
  - Complete the fill and pickup process, making it crucial for them to track their progress as they fill
  - If no refill when filling — double-check for on-hold prescriptions
  - Request refill from physician and add new prescription # to sync list
- Newly synched patient.
  - Look up sync date
  - Short fill to align with current sync date
  - Add to sync list

Medication Synchronization FAQs

Getting Started

This seems overwhelming; I don't know where to start.
Start with patients you already have an existing relationship with. Select a few patients with no more than 3–5 medications.

How can I train my team?
Start with a team-wide meeting and explain the benefits to all involved. Utilize the Health Mart® training on Health Mart University℠ to help facilitate this. Then, choose your key champions of the program and leverage the step-by-step quick guide to begin your practice. Lastly, start slow: Practice on a few patients that you know well and who are willing to help you learn through the process.

What goals should we set?
Your best outcomes happen with 200+ patients, but the pharmacy will really feel a difference when you have 75–100 enrolled! Set small goals of enrolling 3–5 patients a day and in only a few months, you will be seeing the difference.

How can I best explain medication synchronization to a patient?
Talk about the benefit to the patient rather than the actual "program." From the patient's view, it is simply consolidating multiple trips to the pharmacy into one monthly pickup and meeting with the pharmacist.

Here are a few phrases to get you started.

> "Would you like to pick up (or have delivered) all of your medications for the month at once?"
>
> "We offer a service where you are able to pick up (or have delivered) all of your medications once monthly; this will allow you to avoid multiple trips to the pharmacy each month. Can I get you set up now?"

When does workflow become more efficient?
The pharmacy's workflow will start to change when 75–100 patients enroll. The first month will allow you to hit the 100-patient mark if you are able to enroll 3–5 patients a day. Remember, you'll want to complete at least one month's cycle to see the benefits.

What resources do I have for assistance?
Health Mart provides several resources to start a med sync process and maximize outcomes:

- Health Mart University
- NCPA Simplify My Meds® http://www.ncpanet.org/solutions/adherence-simplify-my-meds/simplify-my-meds/preview-of-simplify-my-meds-
- Health Mart Operations Manual: Med Sync page
- *Coming soon:* Med sync marketing materials on the Health Mart Marketing Hub

Syncing Medications

How do I select the best cycle time if a patient has 30, 60 and 90 days' supply prescriptions?
Options to best sync this patients medications include:

1. Fill 90 and 60 days' supplies as 30 days' supply and sync to 30 days' cycle.
2. Sync all meds around a medication to the lowest days' supply (as long as it is 30, or a multiple of 30). Add a note in the calendar to refill 60's every 2 months, and 90's every 3 months.

What if a patient has one prescription with a 28 days' supply?
When a patient has most of their chronic prescriptions at 30 days with one single 28-day value, consider these two options:

1. Fill all prescriptions for the appointment date with days' supply of 28.
2. Exclude the medication with the days' supply of 28. Sync the remaining prescriptions to a 30 days' supply. Make a notation of this in the calendar so the 28-day medication is not missed.

How do I sync medications with a days' supply value that is not typical?
Examples of this include: a prescription that is not a 30 days' supply, a multiple of 30, 28, or a multiple of 28.

Solutions may depend on the actual medication and term of use.

1. Exclude the medication from being synced and add a reminder to the calendar to assess later.
2. Request a new Rx for the med(s) with the needed days' supply value.
3. Fill the prescription with a lower value (matching the cycle). The medication should now be eligible to include in the sync based on the days' cycle selected.

The Appointment

What if the patient cancels an appointment? How to I update the dates?
Change a patient's appointment date in your written or electronic calendar. If not using technology you will need to adjust the fill and pickup dates for the following month. If a patient is two days late picking up one month, the fill and pickup dates for that patient won't show two days early the following month.

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