Health Mart medication synchronization playbook

Health Mart PHARMACY

HOW TO USE THIS RESOURCE

Health Mart® believes medication synchronization (med sync) is truly the game changer for independent pharmacy! Recognizing that pharmacies are at different points with their understanding of and experience with med sync, this playbook was developed with different key milestones in mind. Pharmacies may be at different steps in implementing med sync — from just hearing about it for the first time, to getting started, to having hundreds of patients enrolled. This playbook was written to be a reference for any of those steps. Take a look at the sections below to decide where to turn first, or read cover-to-cover for a comprehensive set of tips and resources.

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Please also note that all case studies referenced herein are for informational purposes only and that your results may differ from the results described in this guide. There is no guarantee of the results you will receive should you implement the programs described here.

INTRODUCTION

Med sync is a game changer!

Medication synchronization is a proactive, appointment-based approach for managing patients who take multiple drugs on a continuing basis. Under med sync, enrolled patients pick up or have their prescriptions delivered on a single day each month. It's a fundamental shift in the historic pharmacy workflow where you fill prescriptions on demand and are constantly in a reactive mode. Med sync helps put you in the driver's seat and move your pharmacy practice forward.[1,2]

Feel like you don't have the time you need to talk to patients? **Do you have any patients that you could be more proactive with or with whom you could be more efficient in your time spent?** Med sync is the answer.

The med sync appointment-based model (ABM) has three main components:[1]

01 PRESCRIPTION SYNCHRONIZATION

02 A MONTHLY PRE-APPOINTMENT CALL TO THE PATIENT

03 SCHEDULED MONTHLY APPOINTMENT

It's not an "extra" appointment in your already busy day — these patients already come in multiple times a month, causing extra phone calls, physician outreach and pharmacy staff time responding to their needs on demand. Med sync helps facilitate a proactive patient-centered approach instead of a reactive prescription-by-prescription–based approach.[2]

At-a-glance a med sync *overview*

Approximately one week before the patient's appointment, the pharmacy calls the patient to confirm the appointment and current medication list.

While contacting the patient, inquire about any issues the patient may have experienced in the preceding month.

The pharmacy then proactively fills all needed medications prior to the appointment.

The patient picks up their prescriptions on their scheduled day, and has a consult with their pharmacist to allow follow-up as needed to support effective therapy.

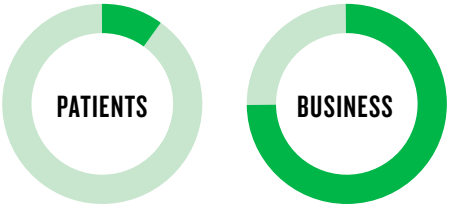
Med sync helps the pharmacy become proactive in caring for patients, shifting from a reactive mode of business to an appointment-based model to free up your time to increase operational efficiencies, revenue and clinical performance.

GET EDUCATED ABOUT THE BENEFITS

Increase operational efficiencies and free up time[1–3]

- Fill all your med sync scripts on your schedule, rather than on demand when patients walk in
- Optimize ordering, inventory management and cash flow by knowing which drugs to stock, and order what you need, when you need it
- Reduce multiple calls from patients and to their prescribers by streamlining pickups or deliveries
- Better integrate medication therapy management (MTM) cases into your workflow, taking advantage of more opportunities during scheduled time with patients

ORGANIZE THE CHAOS



In retail, 10% of patients create roughly 75% of a store's business. Organizing that 10% of patients (with med sync) can make an enormous difference in a pharmacy workflow.[2]

Reduce expenses and increase revenue to improve your bottom line[1–6]

- Predicting your prescription needs and appointment schedule in advance allows you to balance and anticipate staffing and inventory, so you have what you need, and no more
- Monthly patient appointments create opportunities to earn fees for Comprehensive Medication Reviews (CMRs) and other clinical services, such as immunizations
- Maximize revenue from your current patient base by helping them to be adherent, refilling their prescriptions on time and more frequently

ADHERENCE PAYS

For every 100 typical multiple-medication patients enrolled, those increased refills represent an additional

$90,000

in annual revenue — from the same patient base.[6]

Increase your clinical performance[1–7]

- Improve your clinical-performance data on key Star Ratings quality measures, such as PDC scores, as a result of more adherent patients
- Scheduled and routine check-ins with patients allow your pharmacy to better identify gaps in care, conduct CMRs and ensure patient outcomes are positive
- Align additional clinical services to the appointment, such as immunizations and screenings, to do more for your patient as an overall destination for wellness

POSITIVE REFILL RATES, POSITIVE PATIENT OUTCOMES

The average patient fills *7.4 out of 12 refills* on each maintenance prescription. Studies have consistently shown that patients with their medications in sync fill *11 out of 12 refills*, generating an *additional 3.6 scripts* annually per medication per patient. Improved adherence is tied to better patient outcomes.[6]

Resources

Get educated

- Health Mart University℠
  - Med sync learning experience including the Med sync best practices, step-by-step course
- Health Mart Operations Toolkit
  - Visit the Medication Synchronization section in the Clinical Services category for access to additional resources

Get connected

- McKesson Connect Community
  - Join the conversation — ask questions of fellow pharmacists and technician champions and hear about the benefits that other owners are experiencing

The importance of laying the right foundation

Prior to starting a new med sync program, it's important to have a strong foundation in place — essentially:

- The right pharmacy staff
- The right schedule
- Established workflow in the pharmacy

Staff should be cross-trained to be able to help out in more than one capacity as needed (entering prescriptions, filling prescriptions for waiters, med sync tech, etc.). It's key to ensure all staff receive some type of training on med sync and are familiar with how to talk to patients about it.

You also may want to evaluate your pharmacy schedule to ensure you are scheduled to match the traffic in the store, including having your strongest staff and/or more staff when you tend to be the busiest. A staffing benefit of med sync is that you can shift staff off of filling sync prescriptions if you have a lot of waiters drop off all at once.

If your pharmacy doesn't currently have a position-based workflow or process in place for prioritizing prescriptions to be completed, you may want to consider establishing those routines first. Health Mart University has a Promise Time Workflow course that you can use to train your staff. It's also important to have established routines in place for items you want staff to complete on a daily, weekly and monthly basis.

You can also leverage the Pharmacy Self-Assessment Checklist in Appendix A to evaluate areas such as your pharmacy staff and workflow prior to implementing a med sync program. Use Appendix B, Medication Synchronization Implementation Plan, starting with the "Before Beginning Program" section to help ensure you have the right foundation in place.

Top five steps *to* getting started with sync

1. **Evaluate your options. There are two ways that a pharmacy can choose to implement med sync:**
   - ***Technology-enabled programs:*** Many pharmacy management systems have med sync modules. There's a chance your current system already has the needed capabilities. Using technology to implement your solution provides the biggest efficiency gains and an increased ability to manage a high number of patients.
   - ***Paper-based programs:*** These programs, such as the APhA Foundation Program or Simplify My Meds, use a file-card model to track patients and schedule monthly appointments. While less expensive to implement, they require more staff time and can be more difficult to scale as your patient base grows.
2. **Get the whole pharmacy team educated and excited, but choose one champion** to own day-to-day management.
3. **Set a goal.** Enrolling and syncing 5 patients per day will give you 100 patients in a little over a month. Make sure to recognize staff for meeting goals and celebrate success with lunch for the staff or another incentive.
4. **Start small and smart.** Pick a few patients to practice syncing. Look for ones with three to five maintenance medications to align. When the team is comfortable with the process, focus on enrollment every day.
5. **Focus on the lasting advantages, not the initial investment.** Understand that med sync requires work in advance to short-fill medications and prepare for patient appointments. The work upfront will pay dividends later. Once patients are "synced" for monthly appointments, your pharmacy will begin to experience the benefits. Invest upfront in long-term maintenance of your patients and viability of your pharmacy!

IMPLEMENTING MED SYNC

Learn more about the five-step process to implement medication synchronization 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 section of the playbook is recommended as an on-the-job tool, as it provides a quick summary of the details for each step.

The medication synchronization process

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 in 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?

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

How can the team ensure success?

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

Patient identification

1. *Locate patients with four or more maintenance medications for chronic conditions.*
2. *Consider store needs:*
   - 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 specific disease state.

How do you find these patients?

- Use med sync technology reports for lists of patients that meet criteria above.
- 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 allow — builds the team and standard in your pharmacy.
  c. See recruitment section for talking points.

TIP

Start with patients who take only three to five maintenance medications for chronic conditions. While tempting, don't select the most complicated patients with the most medications when first starting your med sync program — gain experience first before enrolling these patients.

TIP

Choose patients with whom you have an existing relationship. 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 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 using the talking points on the next page.

“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?

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 medications.

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.

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?

AVOID THESE PHRASES

These phrases 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
- Drugs that frequently change dosage
  - Coumadin or insulin
- Controlled substances

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

Packaged medications may potentially be added to a sync schedule:

- May need to be the "anchor medication" (see page 15)
- May also dictate the sync interval if a 28-day package (e.g., Fosamax, birth control)

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 preventive services to benefit the patient's health (e.g., CMRs, immunizations, health screenings). Cycle days of 90 days are only favored if cost cnsiderations are the patient's highest priority.

Step 3:
Alignment of medications

Select medications to sync

Review page 14 for detailed information.

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

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.

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).
  - Use the calendar binder (see page 18 for an example) to record script number and short quantity.
  - Organize by date to fill.
- Use override codes (below).

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 consistent note in your pharmacy-management system under the patient's profile (such as "Sync" 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 used 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 to the patient's primary prescriber. Consider also including a complete medication list for the physician. See Appendix D for sample fax template.
- 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

It is important that all pharmacy staff understands what 'Sync' in a patient's profile means and that patients should not be calling in refills for maintenance medications when enrolled in sync. Nothing is more painful then getting a patient's medications aligned only to have them call in refills off schedule. This can also alert the pharmacy to other potential problems.

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

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

Tools needed

- 3-ring binder
- Divider tabs numbered 1–31 (available at office supply stores)
- Tracking sheet (printable version on page 19)

Setup

- Place the 1–31 divider tabs in the 3-ring binder.
- Print off tracking sheets and place two 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 SETUP

Day of month:

PATIENT NAME	RX NUMBER	MONTH	DAYS' SUPPLY

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.

Appointment preparation

A timeline

Seven to ten 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. Though, the preferred method is to place a manual call to the patient and use the checklist above. This is what makes med sync effective and different over the standard auto refill program that the chains provide. This is the true differentiator!**

Pharmacy responsibilities

1. **Place any calls scheduled to be manual and that 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

- **Fill the synced prescriptions in pharmacy-management system.**
  - Determined based on patient's synced prescriptions and patient conversation seven days out.
  - If paper based, check off each one once completed.
  - 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

- Remind the patient of appointment date.
- Instruct the patient to bring any questions or concerns to discuss with the pharmacist.
- Ask 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 this medication?
        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. Document 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 synced patient.
  - Look up sync date.
  - Short fill to align with current sync date.
  - Add to sync list.

Resources

Get educated

- Health Mart University
  - Breaking down medication synchronization package of courses

Get tools

- Health Mart Operations Toolkit
  - Visit the Medication Synchronization section in the Clinical Services category for access to resources on the four learning stages of med sync: discover, prepare, start and maximize

Get connected

- McKesson Connect Community
  - Ask other technician champions and pharmacy owners for their tips regarding getting started

GET ADDITIONAL PATIENTS ENROLLED

Once you have implemented med sync, the next step is typically to grow the number of patients enrolled. Leverage the tips in the Getting Started section for how to approach patients and key ways to phrase your patient interactions. In addition you may want to consider technology, leveraging patient-facing marketing materials and prescriber communications to increase the number of patients enrolled in med sync.

Consider technology

To create more efficiency and capacity, consider technology. Using med sync technology can help make it easier to enroll additional patients. Some vendors also integrate with MTM vendors to make it easier to identify patients eligible for other services at the same time as sync.[3]

Market to patients and prescribers

In the pharmacy

Ensure that patients coming into your pharmacy know that you offer sync. Consider an a-frame message, poster or counter card to raise awareness in the pharmacy. Once you have a medication synchronization program in place, word of mouth is one way to help you spread the news. Encourage patients who have already enrolled in the program to recommend it to a friend or family member. Med sync also offers a lot of convenience for caregivers; consider marketing to caregivers as well as patients.

Identify potential med sync candidates using your sync technology or pharmacy-management system and then leverage a bag stuffer to help prompt the conversation at pickup. If your pharmacy offers delivery, consider offering and/or requiring sync for all your delivery patients on chronic medications. A bag stuffer or other information could be used by your delivery drivers to help recruit additional patients. See Appendix C for sample customizable marketing templates available to Health Mart pharmacies.

Outside the pharmacy

If you service any senior centers or homes, consider offering medication synchronization if you don't already have those medications aligned to a single date each month. If the pharmacist speaks to any community groups regarding pharmacy services, remember to mention the value sync provides. Consider marketing outside your pharmacy with newspaper or other ads. Refer to Appendix C for customizable ads and other marketing support.

Two recent NCPA studies showed that use of automation yielded a 35% higher enrollment rate than manual medication synchronization programs.[3]

⇧ 35%

Some of the different technology options include:

- PrescribeWellness — Star Wellness
- Ateb — Time My Meds®
- Voice Port SYNCHRO Script™
- Select pharmacy-management systems

To prescribers

Notify prescribers that your pharmacy offers medication synchronization services and the benefits to their practice, including streamlined refills as well as prior authorization requests and no weekend phone calls! Consider meeting in person with key prescribers for your pharmacy to let them know more about sync and how it can help coordinate care for their patients and increase adherence. When a new patient is enrolled in your sync program, consider notifying the physician and providing a complete med list along with any prescription-specific requests. See Appendix D for a sample customizable prescriber fax template.

Resources

Get educated

- Health Mart University
  - Breaking down medication synchronization package of courses

Get tools

- Health Mart Marketing Hub
  - Refer to Appendix C for instructions on how to access marketing templates
  - Refer to Appendix D for sample physician fax templates and how to customize them
- Health Mart Operations Manual
  - Visit the Medication Synchronization section in the Clinical Services category to view Med Sync Patient Conversation Starters and more

Get connected

- McKesson Connect Community
  - Chat with other technician champions and pharmacy owners for their tips regarding getting more patients enrolled

GET THE MOST FROM YOUR SYNC APPOINTMENTS

Leverage motivational interviewing techniques

The appointment-based nature of medication synchronization allows the opportunity to streamline your patient conversation to one time each month. This allows you to review all the patient's medications in a single visit and address any potential adherence concerns. To facilitate these conversations, it's important to use the right approach. Motivational interviewing has proven to be an effective method for more efficient and longer-lasting health behavior change. For more information, refer to "Motivational Interviewing: Conversation Starters and Common Objections" in the *Pharmacy Quality Measures: Improving Pharmacy Performance Playbook*, Appendix B, as well as training available on Health Mart University.

Pair MTM and med sync

When enrolling patients in your pharmacy's med sync program, first check to see if they are eligible for a Comprehensive Medication Review or other medication therapy management interventions. Pairing a CMR with med sync allows you the opportunity align the patient's meds while getting paid additional service revenue. Have your tech champion check your MTM portal(s) before each sync appointment to see if the patient is eligible for any new interventions. Remember to tell the patient to allow extra time if a CMR or other service is added to the appointment AND ensure the pharmacy schedule provides dedicated pharmacist time needed to complete any MTM interventions for that day's sync appointments.

Additional services

A specific patient appointment also provides the opportunity to offer incremental revenue-generating services each month such as immunizations, screenings and other innovative services such as genetic testing. During the patient pre-call, consider offering additional services and/or reminding them of what they need to do to prepare (such as wear a short-sleeve shirt for immunizations).

For other ideas on how to enhance the med sync appointment, on the following page is a sample calendar of additional ideas to consider adding to your patient's sync appointment each month. Most of the services noted could be offered year round with a special emphasis during given months.

Enhancing the appointment: sample calendar

JANUARY	FEBRUARY	MARCH	APRIL
New Year's resolutions	**National heart month**	**American diabetes alert day**	**National healthcare decisions day**
Smoking cessation consults and Body Mass Index (BMI) screenings	Blood pressure and cholesterol screening or monitoring	A1c and blood glucose monitoring	Comprehensive Medication Reviews
MAY	**JUNE–JULY**	**AUGUST–SEPTEMBER**	**OCTOBER–DECEMBER**
National high blood pressure awareness month	**UV safety month**	**National immunization awareness month**	**Talk about your medicines month**
Blood pressure screenings and monitoring	Consultations on sun sensitivity of medications and sunscreen recommendations	Immunizations: Influenza, vaccinations for seniors Travel vaccines	Medicare Part D Open Enrollment consultation and MTM services

Resources

Get educated

- Health Mart University
  - Change the conversation: Interactive adherence coaching for pharmacy

Get tools

- Health Mart Operations Toolkit
  - Visit the Medication Synchronization section in the Clinical Services category for checklists on launching the program, guides by role and more
- Health Mart Marketing Hub
  - Refer to the hub for Medicare Part D Open Enrollment resources and patient marketing templates including immunizations

Get connected

- McKesson Connect Community
  - Ask other pharmacists for suggestions on how they incorporate additional value-added services to their med sync appointments

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Appendices

APPENDIX A

Pharmacy self-assessment checklist

1. Complete a self-assessment of your pharmacy's operational status.

Pharmacy staff

	Circle one:	
Pharmacy staff is able to cover more than one function in the pharmacy	*yes*	*no*
Pharmacy staff is scheduled based on store traffic patterns	*yes*	*no*
My staff has the skills to take on new responsibilities	*yes*	*no*
Pharmacy staff can articulate to customers the current clinical services offered in our pharmacy (e.g., MTM, immunizations)	*yes*	*no*

How adaptable is the staff to change or adopting new practice methods?

1 – Very adaptable
2 – Somewhat adaptable
3 – Unsure
4 – Somewhat unadaptable
5 – Very unadaptable

Workflow

Workflow is organized by stations (reception, data entry, dispensing, verification, release to patient)	*yes*	*no*
Prescriptions are prioritized based on pickup time (i.e., waiters vs. other refills)	*yes*	*no*
Delivery is organized by area to reduce repeat trips	*yes*	*no*

Pharmacy staff is using available automation to its fullest capacity

1 – Strongly agree
2 – Somewhat agree
3 – Unsure
4 – Somewhat disagree
5 – Strongly disagree

Based on my current pharmacy workflow, it will be easy for me to transition to prioritized prescription filling and appointment-based services

1 – Strongly agree
2 – Somewhat agree
3 – Unsure
4 – Somewhat disagree
5 – Strongly disagree

Pharmacy self-assessment checklist (continued)

Store design and organization

	Circle one:	
There is a computer terminal and phone available outside of normal workflow	*yes*	*no*
Adequate space exists to offer consultations and appointments	*yes*	*no*
Records are maintained in an organized manner, including patient files	*yes*	*no*
Pharmacy is clean, organized and gives the appearance of a healthcare destination	*yes*	*no*

Inventory

I know the amount of prescription inventory on my shelves today	*yes*	*no*
Pharmacy is able to anticipate customer refills and order "just in time"	*yes*	*no*

My baseline inventory allows me to have adequate cash flow

1 – Strongly agree
2 – Somewhat agree
3 – Unsure
4 – Somewhat disagree
5 – Strongly disagree

I use the following methods for ordering prescription product today:

1 – Daily want or replace book used to place orders
2 – Walk shelves with "order to levels"
3 – On-demand "just in time" ordering

2. ***Based on your answers above, consider the following questions as well as any steps you might need to take to remove any existing barriers prior to starting a med sync program.***

Where does your pharmacy team excel (in regard to operations)? Why?

_____

_____

What is the top concern you need to change to ensure a strong foundation? Why? How will you do this?

_____

_____

Do you foresee any major barriers with motivating your employees?

_____

_____

APPENDIX B

Medication synchronization 30-60-90–day implementation plan

Before beginning a med sync program

1. **Ensure your team is in place.**
   - ☐ Assess knowledge and training gaps in current staff.
     - – Create a training plan to remove any barriers to work
   - ☐ Understand change management within your team.
     - – Know motivating factors for each team member and leverage to drive change
     - – Share the "why's" behind operating effectively
     - – Include total team in plan to change
   - ☐ Implement cross-training.
     - – Ensure technicians can perform every technician function in the pharmacy
     - – Train cashiers to do all actions allowed by your state laws
2. **Build a patient-focused schedule.**
   - ☐ Analyze your business based on when "waiting" prescriptions arrive at your pharmacy and when the most pickups occur.
   - ☐ Schedule the most staff during these peak times. During slower times when at peak schedule, team then works on non-waiting prescriptions (therefore, they are always productive).
3. **Create a workflow that is position based and prioritized.**
   - ☐ Each prescription is handled in order based on time due.
   - ☐ Prescriptions move between work stations (reception, data entry, filling, verification, release) in step-wise fashion.
4. **Reinforce routines for daily, weekly and monthly tasks.**
   - ☐ Filling of prescriptions.
   - ☐ Paperwork and other ancillary documents for prescription filling.
   - ☐ Other documents as needed with associated location and organization.
   - ☐ Inventory/order.
   - ☐ Leverage a list with check-off to help drive routines and reinforce behavior.

Medication synchronization 30-60-90–day implementation plan (continued)

First 30 days

1. **Select medication synchronization program (manual or vendor):**

2. **Purchase program materials.**
   - ☐ Binder, page protectors, file box (paper).
   - ☐ Ensure data integration complete (technology).
3. **Complete any vendor-specific onboarding and training.**
4. **Select champion:**

   - ☐ Ensure champion is the "expert" at med sync, and understands all facets of the program.
   - ☐ Determine how to inspire and motivate employees.
   - ☐ Discuss ways to engage and reward for reaching goals.
5. **Set mutually agreed enrollment goals with champion and team:**

   - ☐ Consider contest or incentive for pharmacy team members who enroll the most patients and/or exceed enrollment goals.
   - ☐ Determine initial patients to target for go-live.
6. **Train staff:**

   - ☐ Educate on why this change is happening.
   - ☐ Share the benefits of med sync, and why adopting this will make their pharmacy more efficient and easier to work in.
   - ☐ Ensure technician staff understand the process and how to complete steps in med sync.
   - ☐ Ensure cashier staff understand how to ask patients to participate in med sync, and understand the process and what to do when a customer is enrolled.

Days 31–60

1. **Go live with technology or implement manual program.**
2. **Remind staff of enrollment goals and initiate contest or enrollment incentive (if applicable).**
   - ☐ Target enrolling 5+ patients/day for goal of 100 patients in first month the program is live.
3. **Develop and/or start to use marketing materials.**
   - ☐ Bag stuffers.
   - ☐ Patient-facing flyer.
   - ☐ Physician marketing material.
4. **Re-check staff for program understanding.**
   - ☐ What to do with new prescriptions for a patient on med sync.
   - ☐ Process for re-syncing a patient due to change in therapy, hospital stay, etc.
5. **Weekly review of goal achievement.**
   - ☐ Determine how champion will monitor and post the progress so it's visible to entire staff.
   - ☐ Recognize top contributors and milestones.

Days 61–90

1. **Evaluate status to enrollment goal.**
   - ☐ Celebrate early success from contest or enrollment incentive.
   - ☐ If not meeting goal, consider reinforcing with staff or addition of incentive.
2. **Consider if any training of new staff or retraining of existing staff is necessary.**
3. **Determine next group of patients or patient criteria to target for enrollment.**
4. **Start to evaluate adding additional services to the "appointment" each month** (e.g., influenza vaccines in fall, Medicare Open Enrollment, MTM, or other disease-state-specific offerings such as adding on Omega-3 for anyone on a statin).
5. **Expand marketing to new patients and/or providers.**
6. **At least three months after initiation of the program, monitor outcomes-based information from your med sync vendor (if applicable) and pharmacy quality measures performance via EQuIPP.™**

APPENDIX C

SimpleSync™ marketing materials

Refer to the Health Mart Marketing Hub on McKesson Connect (search term = sync) to find modifiable templates that can be used to market to patients, including SimpleSync. The following types of templates are available:

- Bag stuffer
- Customizable ads
- Patient-facing one pager with FAQs
- Postcard
- Counter flyer
- Poster
- A-frame inserts
- And more

Health Mart matching funds may be applied to order the SimpleSync marketing materials.

Refer to the Hub for more specific details.

APPENDIX D

Prescriber fax template

Refer to the Health Mart Marketing Hub on McKesson Connect to find modifiable physician fax templates that can be used to communicate with prescribers and market your pharmacy services (search term = physician). To gather more information on prescribers, refer to the Physician Outreach Program.

The fax templates indicate that you will provide a copy of the patient's medication list. Use your pharmacy-management system or med sync technology platform to print a copy of the patient medication list to attach.

Medication synchronization notification

Patient medication list attached for review

Date _____

Prescriber _____ **Fax** _____

Patient Name _____ **DOB** _____

Our mutual patient has chosen to participate in SimpleSync™, a program which helps enhance their overall care by coordinating all of their medications into one monthly pickup or delivery. SimpleSync is being used in an effort to help improve the patient's adherence and management of your prescribed medication regimen. It will also help us to streamline communication to your office by proactively ensuring the patient has refills available for all their medications.

I have reviewed the patient's prescriptions filled at our pharmacy and attached a current medication list for your review.

We would like to ensure that the medications we will supply to this patient are accurate and complete. Notify us by fax or phone if there are any discrepancies between the medications listed on the attached page and your records. Also, please send any new prescriptions and/or future changes to our pharmacy.

Please do not hesitate to contact us with any questions.

Pharmacist Signature _____ **Date** _____

Your Health Mart Pharmacy

Thank you for partnering with [Your Health Mart Pharmacy] to improve medication adherence and patient care. Please call us with any questions at [Insert Phone Number]

Your Locally Owned Health Mart PHARMACY

[INSERT PHARMACIST'S NAME]
1234 MAIN STREET
ANYTOWN, ST 00000

PHONE 415.555.1212
FAX 415.555.1212
PHARMACY WEBSITE

If you no longer want to receive faxes from [insert name of pharmacy] and want your name and fax number removed from the distribution list, please call [insert phone number]. Alternatively, to opt out of receiving faxes, fax this document to [insert fax number], and check the box below. In order to process your opt-out request, you must provide us the fax number for which the opt-out request applies. Pursuant to applicable law, we must process your request within the shortest reasonable time, not to exceed 30 days. Your opt-out request may be revoked if you subsequently provide us with express invitation or permission, in writing or otherwise, to send advertisements to that fax number.

☐ Fax Opt Out Fax Number _____

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HM-09730-07-15 Health Mart - Physician Outreach - Medication Synchronization Template

McKESSON

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