Patient Enrollment Workflow Guide

Use this resource to help you integrate the med sync patient enrollment process into your workflow.

MONTH

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

Enrollment selection: *Choose one*

1 Daily enrollments
- Enroll 1–2 patients daily
- Enroll at the beginning of the day
- Select from the recruitment list
- Focus on patients with the 2–5 eligible meds to start

Recommended for: Pharmacies where more than one person owns program and majority if not all of staff are trained in full workflow

2 Weekly enrollments
- Enroll 6–12 patients weekly
- Choose same day each week to enroll
- Select from recruitment list
- Focus on patients with 2–5 eligible meds to start

Recommended for: Pharmacies where the technician champion owns the program and majority of staff are <u>not</u> trained on med sync workflow

3 Bi-monthly enrollments
- Enroll 12–24 patients every other week
- Choose same day each week to enroll
- Select from the recruitment list
- Focus on patients with 2–5 eligible meds to start

Recommended for: Pharmacies where the technician champion owns the program and majority of staff are not trained on med sync workflow

Rx Health Mart PHARMACY

Regardless of which enrollment selection you choose, the following tasks should be completed:

First fill management (*monitor daily*)

☐ Complete prior authorization request for impacted meds prior to enrolling in sync

MD refill request (*note: frequency of task varies with type of enrollment*)

☐ Print out a list of all medications enrolled

☐ Request after each enrollment

☐ Try to initiate at least 7–10 days in advance

☐ Request all refills at once (MD checks the chart once a month)

☐ Create a file for pending refill request — monitor daily for response (place med printout in file and remove once resolved)

Medication order management (*monitor daily*)

☐ Order medication at least 5 days prior to scheduled pickup

☐ Create a file for pending order request — monitor daily for drug receipts (see right-hand box for example; place med printout in file and remove once resolved)

Sync fill management (*monitor daily*)

☐ Designate 2 days (preferably on slow days or days with full staff) to perform sync fills *(For pharmacies who choose not to perform sync fills five days prior to patient pick-up)*

☐ Create 2 files known as Med Sync Ready Bins corresponding to the selected days — med printouts will be placed in files until pharmacy is ready to fill (write the date you want to fill on the med printout)

☐ Try to adjudicate all meds at the same time

☐ Fill on the designated day once (refill, order and third-party insurance exceptions are resolved)

Patient prep call (*monitor daily*)

☐ Perform at least 5 days prior to the pickup

☐ Leverage best practices for calls

Short fill management (*note: frequency of task varies with type of enrollment*)

☐ Fill now if patient is waiting in store or fill is due today (immediately after patient enrollment)

☐ Schedule to fill (if pharmacy management system allows) at a later date, if due in the future

Staff communication (*note: frequency of task varies with type of enrollment*)

☐ Flag synced patients in the pharmacy management system (e.g., pop-up message or indicator in demographic field that doesn't affect med reimbursement)

These are the recommended trays for patient management for all enrollment selections:

Pending refill authorization

Pending order receipt

Med sync ready to fill bin (Day 1)

Med sync ready to fill bin (Day 2)