BlueRX/Blue Advantage MTM Encounter Guide

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The Power of Pharmacy

OCTOBER 15, 2007

This Encounter Guide contains the step-by-step guidelines for conducting a 2007 BlueRx/Blue Advantage Medication Therapy Management (MTM) encounter, using the MirixaPro web-based tool. The encounter is intended to be conducted face-to-face between patient and pharmacist.

Please be certain to read this entire guide prior to your encounter with the patient.

Program Resources

Patient Education Materials

Visit the Program Resources Section in MirixaPro to view all applicable materials and patient handouts which you can then distribute to patients as you see appropriate.

Blue Rx/Blue Advantage Part D MTM Program Description 2007

To better understand the clinical services expected to be delivered by pharmacists under the 2007 Part D MTM program; please read the *BlueRX/Blue Advantage Part D MTM Program Service Description 2007*. This document describes each element of the program and the pharmacist's clinical responsibilities.

Six Key Steps

There are six key steps to complete a BlueRX/Blue Advantage MTM encounter:

1. Schedule an appointment with the patient within 7 days of the case assignment
2. Review the patient's case in MirixaPro and prepare for the encounter
3. Conduct the face-to-face component of the encounter
4. Document and bill for services within 30 days of the case assignment
5. Provide a Personal Medication Record and Medication Action Plan to the patient
6. Schedule and complete a follow-up visit if deemed necessary

Step 1 – Schedule an appointment with the patient within 7 days of the case assignment

Call the patient to schedule an appointment of approximately 30 minutes. Ask the patient to bring all their prescription and OTC medications to the encounter, as well as any available laboratory data they may have from recent doctors' visits.

During the conversation confirm the following information with the patient:

- Personal Information
- Known Allergies
- Chronic Conditions
- Prescription Medications
- Current OTC Medications

<u>How do you document a patient decline?</u>

If the patient chooses not to participate in the service, you may decline them out of the program using the patient decline feature which is located in the scheduling area of MirixaPro. You document the patient decline in these instances:

1. Patient or representative declines the service
2. Patient is unavailable (hospitalized, admitted into a skilled nursing facility, deceased)
3. You are unable to contact the patient after three attempts on three different days*
4. The patient does not keep their original appointment and misses a second scheduled appointment*

*If you are unable to contact the patient, but would like to make further attempts to provide the service, you may do so at your own discretion.

Step 2 – Review the patient's case in MirixaPro and prepare for the encounter

Advanced preparation is the key to maximizing the face-to-face encounter.

<u>Pharmacy Dispensing System's Medication Records</u>

The patient's MTM services were assigned to you because the majority of their prescriptions are dispensed in your pharmacy. Compare the following information from MirixaPro with your pharmacy's records:

- Personal Information
- Known Allergies
- Chronic Conditions
- Prescription Medications

Based on your pharmacy records and/or your conversation when you scheduled the appointment, enter any additional information into the MirixaPro.

<u>Mini Worklist</u>

The Mini Worklist is one of the most important tools in MirixaPro which will assist you through the process of providing a service. You can view the mini worklist in several places throughout the web-based tool, including within a patient's specific case. If you have a doubt as to the next step, consult the mini worklist in the patient's case.

Medication List

MirixaPro will display recent drug claims data. Review the claims data, such as the last fill date, days supply and number of days between fills, to identify possible compliance or patient education issues.

Red Flags

MirixaPro identifies specific types of alerts:

- Red Flags – identify potential safety issues

Resolution of Red Flags may require prescriber authorization to change a medication; therefore it is preferable to initiate these authorizations prior to the face-to-face encounter. During the encounter, discuss any authorized and/or suggested changes with the patient. Assure the patient that no interchange will be made without their permission and the prescriber's authorization.

Step 3 – Conduct the face-to-face component of the encounter

Once you complete the preparation, you are ready to conduct the face-to-face component of the MTM Encounter. Based on the circumstances, the pharmacist may make an informed decision to provide the encounter over the phone. For the face-to-face encounter, it may not be logistically possible to meet in an area with computer access. Depending on your setting, follow these guidelines:

Conducting the encounter without a computer:

1. Print a copy of the patient's chart from the MirixaPro.
2. Use this guide during the encounter and record the information on the printout of the chart.
3. After the encounter is complete, the information from the hard copy must be entered into the MirixaPro.

Conducting the encounter with a computer:

1. Use this guide during the encounter and record the information *directly* into the MirixaPro.

Medication Review

During the encounter, review the medications (prescription & OTC) with the patient, and ask:

- Are you still taking this medication? (If not, discontinue and remove from the list)
- Do you know what this medication is used for?
- How do you take this medication? (e.g. Once daily with food)
- Are you experiencing any problems or adverse reaction with the medication?

Be sure to record the patient's responses in the MirixaPro.

While reviewing the patient's medications, consider these general assessment points:

- Compliance and adherence with medication regimen;
- Possible unnecessary duplications of therapy;
- Possible meds to discontinue because they are no longer required;
- Potential drug-drug, drug-allergy, drug-condition interactions;
- Possible physical signs of adverse drug reaction (e.g., jaundice, slurred speech, etc.);
- Possible untreated medical conditions that require treatment;
- Possible safer alternative medications (e.g., alternatives to Beers List medications);
- Appropriateness of dosage, frequency, route, and time of administration;
- Known lab values that may help evaluate appropriateness of drug therapy;
- Potential cost-saving alternatives to the patient's medication regimen.

Additional Information

If you were unable to determine additional information before the face-to-face encounter, be sure to ask the patient about this information during the encounter. The additional information may include:

- Allergies
- Chronic Conditions
- Additional prescription medications filled at other pharmacies
- Current OTC medications

Record the additional information and answers to the above questions in the MirixaPro. Take note of any additional red flag interactions as the additional information may trigger, and be sure to resolve these alerts before moving on.

Step 4 – Document and bill for services within 30 days of the case assignment

Before billing for the encounter, you must complete all documentation items. This includes quantifying the types of interventions identified (i.e. safety, cost-savings, etc.). Once all tasks have been checked off, you have completed the patient's case.

Complete SOAP notes for Documentation

Before billing for the provided service, you must document the patient's case. This is completed in the MirixaPro tool by using SOAP notes. Below is a brief description of the SOAP notes technique:

Subjective - What the patient tells you and/or the patient's response to questions about their medication. (e.g. "I feel sick"; Patient says they often forget to take their medication).

Objective - Any factual data you obtain (e.g. lab values, blood pressure, etc.).

Assessment - List any problems the patient has with their medications and your suggested resolution (e.g. compliance, following medication directions, etc.).

Plan - Contains the pharmacist and patient plans, as well as where you will record the number and types of interventions.

- **Pharmacist Plan -** Include any pharmacist-specific plans, such as a need to follow-up with a prescriber. The pharmacist plan transfers to a Patient Chart in the Mirixa web-based tool.
- **Patient Plan –** Include suggestions to the patient to better manage their medications. Be certain to complete in layman's terms so the patient can easily understand your recommendations. The patient plan transfers to a Personal Medication Record (PMR), which you should give to the patient.

Additional Questions- Be sure to complete the additional questions section titled Assessment of Patients Self-Management of Medications and Follow-Ups. These fields are required as designated by the red asterisks and are an important part of identifying the success of the initial session.

Authorizing and Billing

Within the Mirixa web-based tool, the CPT codes will be populated for you with an explanation for you to choose the appropriate code

One of the last tasks in the documentation is to attest that you have completed all elements of the program. Be certain to confirm all attestations prior to authorizing and billing the service.

Step 5 – Provide a Personal Medication Record and Medication Action Plan to the patient

The PMR and MAP are populated with information you entered in MirixaPro, including:

- Medication Information (Purpose, Directions, etc)
- Additional prescription and OTC medications

The PMR is an invaluable tool for the patient, which they should share with their different health care providers to ensure consistent and complete medication information. Counsel the patient to bring their PMR to each pharmacy, physician or hospital visit.

Service Summary

Following the PMR and MAP is a service summary document. This document will display and print with the PMR and MAP. Be sure to check the services provided and sign the bottom of the document. As soon as possible after the encounter, provide the patient with a copy of their Personal Medication Record (PMR), Medication Action Plan (MAP) and service summary.

Step 6 – Schedule and complete a follow up service if deemed necessary

After the patient receives an initial traditional 30-minute Medication Therapy Management (MTM) service the pharmacist will determine the need for a 15-minute follow-up service based on the objectives below:

Before providing the follow up service review the original 30 minute MTM case which will be located in the closed cases section on your dashboard.

During the 15-minute follow-up service(s), the pharmacist aims to achieve five basic objectives:

- Follows-up on previously identified issues
- Reinforces education provided to the patient at the initial service
- Assesses patient progress since the initial service and their MAP
- Determines if any new issues have arisen
- Appropriately intervenes if the patient is taking any new medications since the original service.

Please note that Allergies, Conditions and Medication List will be prepopulated with the information obtained during the previous service and the red flag feature will be turned off. Make any changes where applicable.

Once these objectives are completed be sure to document all actions taken in the Chart Notes Section of the Documentation tab and submit for billing. Be sure to complete **all** required fields as well as the additional questions which are clearly marked with red asterisks.