

MTM Daily Checklist

Best practices: Make MTM tasks a part of your regular workflow. Determine which tasks align with the typical flow of your day.

	MORNING: Take a few minutes to review work already in progress in order to plan follow-up with prescribers or patients, finish documentation for MTM services that were resolved and identify the next MTM opportunities to address.
	Login to the Outcomes platform to review the Dashboard
	Address any Claims to Review and Resubmit
	 Review Patients in Progress Did toy receive prescriber responses that you can document? Does the pharmacist need to follow up with a patient today? Is it time for another contact attempt for prescriber or patient?
	• Provide reminder calls to patients with appointments in the next 24-48 hours.
	 Look for Checkpoints Available for Adherence Monitoring Is it time to complete a quarterly checkpoint? Review the Adherence Monitoring queue for any patients who may benefit from extra attention.
	Start new MTM Opportunities
	• Contact Needs CMR patients to set a time for them to talk with the pharmacist .
	 Add CMR appointments to each Patient Profile in the Outcomes platform.
	 Best practice: Schedule the CMR when the patient is due to pick up a refill. Inform the pharmacist of TIPs to address today (create a list, add reminder notes in patient bags, etc.). Best practice: Protect PHI. Do not print patient lists or TIPs as they contain sensitive information.
2	MIDDAY:
	Throughout the day, prepare for upcoming appointments and document claims as MTM services are started or completed
	Prepare for upcoming CMRs
	• Update Medication Profiles with directions, prescriber names, etc.
	• Best practice: Call the patient to verify current medications, including samples, cash pay and
	over-the-counter products.
	 Print CMR worksheet and enter in patient information. Store securely if PHI is included!
	Complete documentation for any pending claims resolved today
	Pharmacist can deliver CMRs or discuss TIPs with patients
	• Best practice: Schedule CMRs during overlap, so the pharmacist can step away from the counter.
3	EVENING: Wrap up documentation for today's work and send out any remaining patient or prescriber communications.
	Document CMRs and any other completed MTM services in the Outcomes platform
	Print and mail any Patient Takeaways
	Create and send prescriber recommendations • Best practice: Use the Create Prescriber Fax tool in the Outcomes platform



MTM Workflow Assignments

Best practices: Let staff members take ownership of specific tasks to increase staff engagement in MTM and find new efficiencies to maximize your MTM program.



Clerk/Technician 1

FOCUS: Scheduling CMRs and alerting pharmacist to opportunities

Daily tasks

- Monitors Outcomes platform Dashboard for new MTM opportunities
- Provides list of CMRs scheduled today to pharmacist
- CMR reminders
 - Creates reminder call list for tomorrow's CMRs
 - Begins reminder calls to patients
- Prepares new MTM opportunities for pharmacist
 - Schedules new CMRs
 - Alerts staff to the patients with a TIP for the pharmacist to address

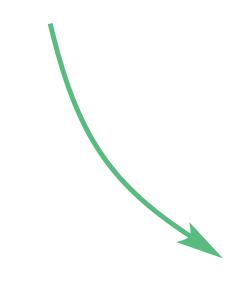


Technician 2

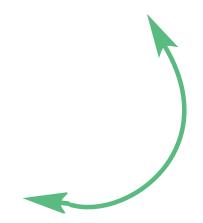
FOCUS: Documentation

Daily tasks

- Monitors Outcomes platform Dashboard for Review & Resubmit claims, Patients in Progress and Scheduled CMRs
- In-progress work
 - Follows up on prescriber recommendations
 - Follows up with patients
- Pre-work for scheduled CMRs
 - Updates Medication Profiles
 - Prints CMR worksheets (if needed)
- MTM service documentation based on RPh notes
 - Prints & mails Patient Takeaways
 - Starts claims for services awaiting patient or prescriber response
 - Documents claims for completed services
 - Creates and sends prescriber communications







Daily tasks

- CMR pre-work
 - Reviews TIPs and medication list for potential drug therapy problems
 - Fills out CMR worksheet and creates discussion points for the CMR
- Completes CMRs
 - Passes notes to technician for documentation and follow-up
- Acts on TIPs
 - Reviews TIP to determine what action is required
 - Talks with the patient and/or recommends a change to the prescriber, if needed
 - Passes notes to technician for documentation
- Reviews claims documented by the technician for accuracy