

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.

1 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** **T**
- Address any Claims to Review and Resubmit** **T**
- Review Patients in Progress** **T**
 - Did you 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?
- Look for Scheduled CMRs** **T**
 - Provide reminder calls to patients with appointments in the next 24-48 hours.
- Look for Checkpoints Available for Adherence Monitoring** **T**
 - 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** **T**
 - 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** **T**
 - 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** **T**
- 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** **T**
- Print and mail any Patient Takeaways** **T**
- Create and send prescriber recommendations** **T**
 - **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



Pharmacist

FOCUS: Completing MTM services

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