

Medicare Plan Reviews

Identify Patients

Your Patient List

To access a list of your Medicare eligible patients, click on Medicare Plan Reviews in the control panel of your Patient Engagement Center.

Within this screen, your patients will fall into one of three categories:

The screenshot shows the 'Medicare Eligible Patients' interface. At the top, there are three tabs: 'Plan Review Eligible' (highlighted with a red box), 'Completed', and 'Declined'. Below the tabs, there are sorting and filtering options. The 'Sort By' dropdown is set to 'Total Billed' with an 'add sorting' option. The 'Filtered By' dropdown is set to 'Enrollment: Outside'. There is an 'Actions' dropdown and a 'Filters' button. The main table has the following columns: PATIENT, AVERAGE COPAY, RDC MAINT. (DIAB./HYP./CHOL.), AGE (DOB), MAINT./ACTIVE MEDS (BILLED TOTAL), and NEXT FILL (LAST FILL). The table contains four rows of patient data.

PATIENT	AVERAGE COPAY	RDC MAINT. DIAB./HYP./CHOL.	AGE DOB	MAINT./ACTIVE MEDS BILLED TOTAL	NEXT FILL LAST FILL
<input type="checkbox"/> Madison, Trevor Phone: (555) 409-7002	\$14.02	100% -/-/94.7%	64 10/12/1955	4/9 \$31,35997	09/10/2020 08/17/2020
<input type="checkbox"/> Baxter, Margie Phone: (555) 555-5555	\$9.61	95.2% 87.4%/100%/100%	64 11/16/1955	9/13 \$15,586.54	09/02/2020 08/22/2020
<input type="checkbox"/> Gore, Blanca Phone: (555) 555-5555	\$12.35	87.2% 100%/96.8%/100%	65 05/25/1955	8/10 \$14,897.34	09/07/2020 08/27/2020
<input type="checkbox"/> Kuhn, Albert Phone: (555) 555-5555	\$6.46	90.9% -/94.7%/94.7%	65 07/09/1955	7/9 \$12,189.35	09/04/2020 08/19/2020

1. Plan Review Eligible: This tab consists of patients that have yet to complete or decline a Medicare plan review.
2. Completed: This tab consists of patients that have completed a Medicare plan review.
3. Declined: This tab consists of patients that have declined a Medicare plan review.

SORT

By default, the patient list is sorted by **Total Billed**. You can sort the patient list by a variety of options.

1. Click on Add Sorting to select an option.
2. The patient list will update to display in descending order. Click on the arrow to display the patient list in ascending order.
3. To remove the sort, click the X button.

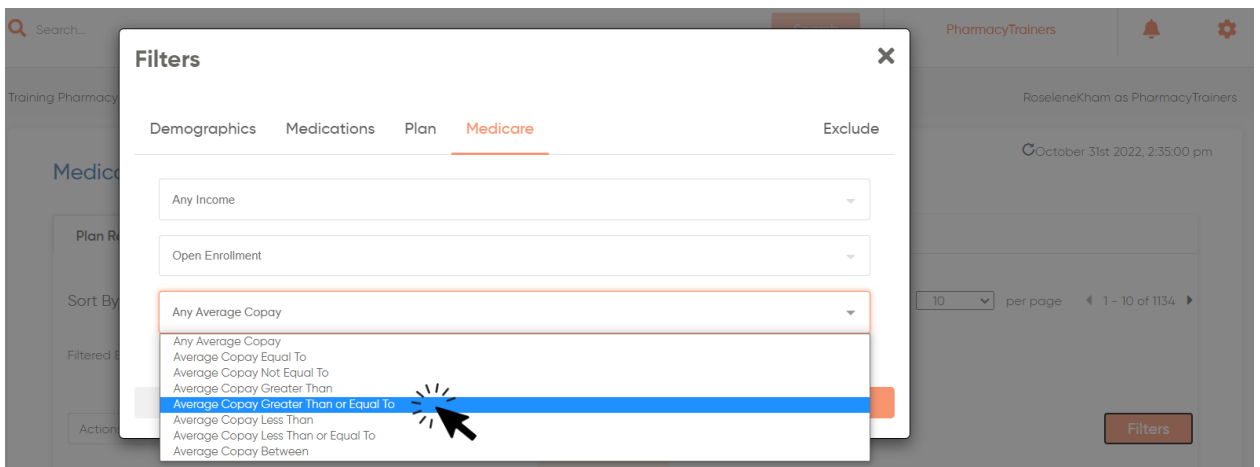
The screenshot displays the 'Medicare Eligible Patients' interface. At the top, there are three tabs: 'Plan Review Eligible' (selected), 'Completed', and 'Declined'. Below the tabs, the 'Sort By' dropdown is set to 'Total Billed' with an 'X' icon to its right and an 'add sorting' button to its left. The 'Filtered By' section shows 'Enrollment: Outside'. An 'Actions' dropdown is also visible. The patient list contains five entries, each with a checkbox and a patient name and phone number. A dropdown menu is open over the 'Sort By' field, listing various sorting options: 'First Name', 'Last Name', 'RDC Maint', 'MedWise Risk Score™', 'RDC Diab', 'RDC Hyp', 'RDC Chol', 'Age', 'Date of Birth', 'Maintenance Meds' (highlighted in orange with a mouse cursor), 'Active Meds', 'Next Fill', 'Last Fill', and 'Average Copay'.

Plan Review Eligible	Completed	Declined
Sort By ▼ Total Billed ✕ add sorting ▼		
Filtered By Enrollment: Outside		
Actions ▼		
<input type="checkbox"/>	PATIENT	
<input type="checkbox"/>	Madison, Trevor ▼ Phone: (555) 409-7002	
<input type="checkbox"/>	Baxter, Margie ▼ Phone: (555) 555-5555	
<input type="checkbox"/>	Gore, Blanca ▼ Phone: (555) 555-5555	
<input type="checkbox"/>	Kuhn, Albert ▼ Phone: (555) 555-5555	

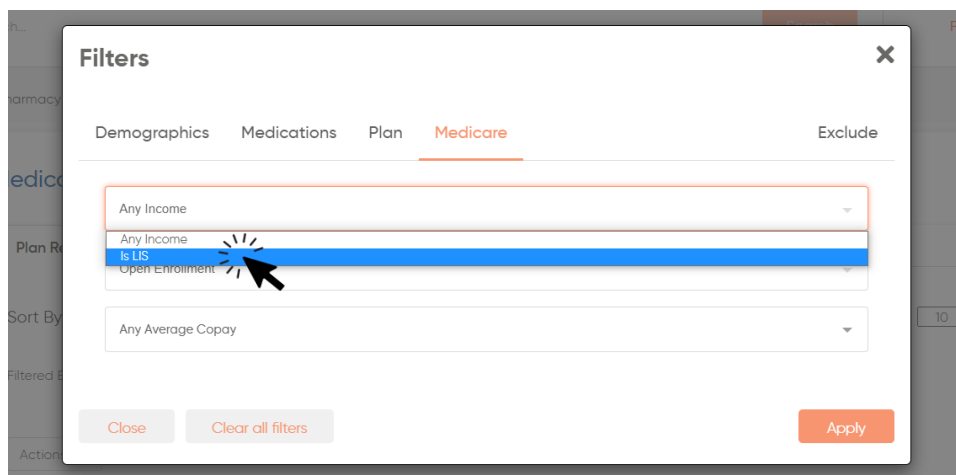
FILTER

Use filters to identify patients. First, click the **Filters** button. Within the resulting pop-up window, select the **Medicare** tab. You can then filter by any of the following categories by selecting an option from the respective drop-down menu:

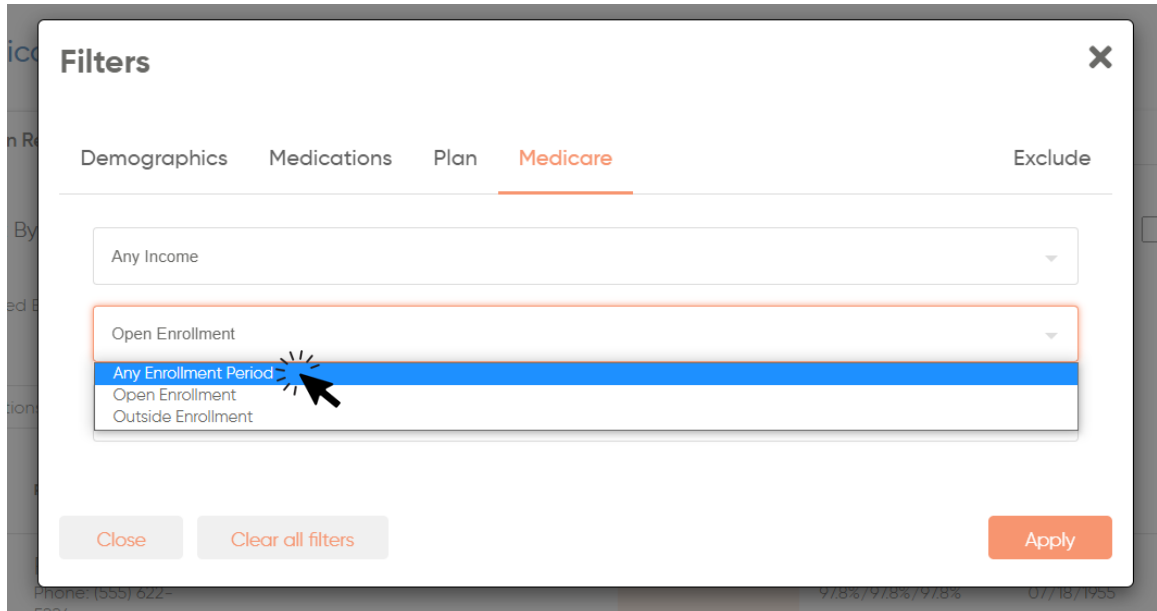
1. The values displayed in the Average Copay column are the sum of the copays paid on all the medications that the patient has filled year-to-date, divided by the total number of medications. The patients that are spending the most out-of-pocket for their medications may benefit from a Medicare plan review. Click on Any Average Copay to select any given range of values.



2. If you only want to see low-income subsidy patients, click on Any Income, and select Is LIS (Low Income Subsidy) from the drop-down menu.



3. Click on Any Enrollment Period to choose which eligibility period to view. Open Enrollment lists all Medicare patients that will be eligible to change or renew their plan for the next year. Outside Open Enrollment lists patients turning 65 (and therefore eligible for initial enrollment).



4. Click Apply to view your updated list.

Educate Patients

Campaigns

Through PrescribeWellness, you can record messages to educate patients.

	Who	Why	When
 Open Enrollment	Patients 64.5 or older	Educate patients about Open Enrollment and encourage plan review	One-Time Campaign Daily 10 AM – 5 PM
 Turning 65	Patients turning 65 in three months	Educate patients about Initial Eligibility for Medicare and encourage plan review	Automated Daily 10 AM – 5 PM
 Medicare Eligibility	Patients you prioritize for plan reviews	During Open Enrollment, encourage plan review	OnDemand

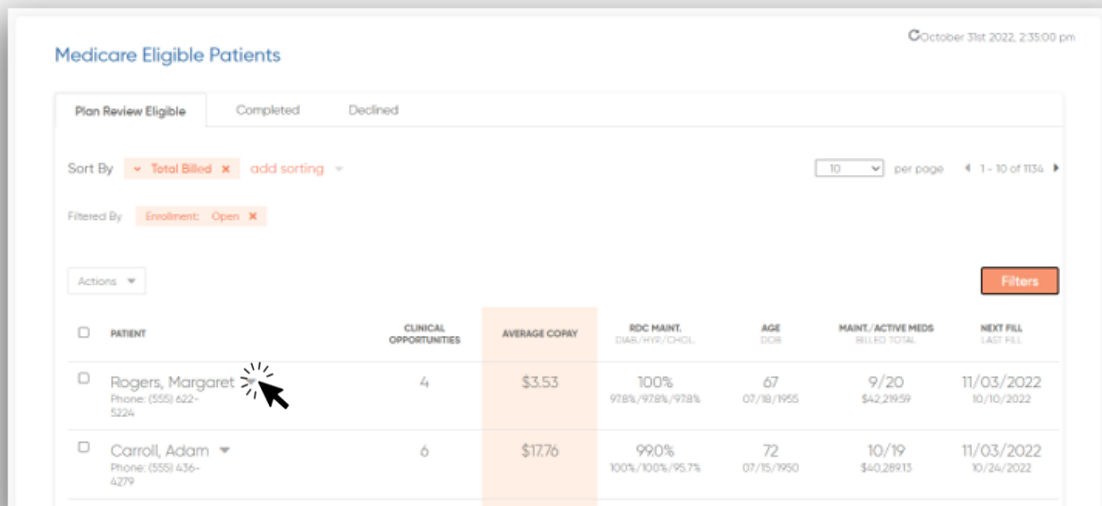
For instructions on recording campaign messages or how to set up text messages, visit the Success Center.

Consult with Patients

Open the Patient Medicare Profile

Open the Patient Profile from the Medicare Plan Review screen, or the Patient Profile.

To open the profile from the Medicare Plan Review screen, click on the patient's name.



Medicare Eligible Patients October 31st 2022, 2:35:00 pm

Plan Review Eligible | Completed | Declined

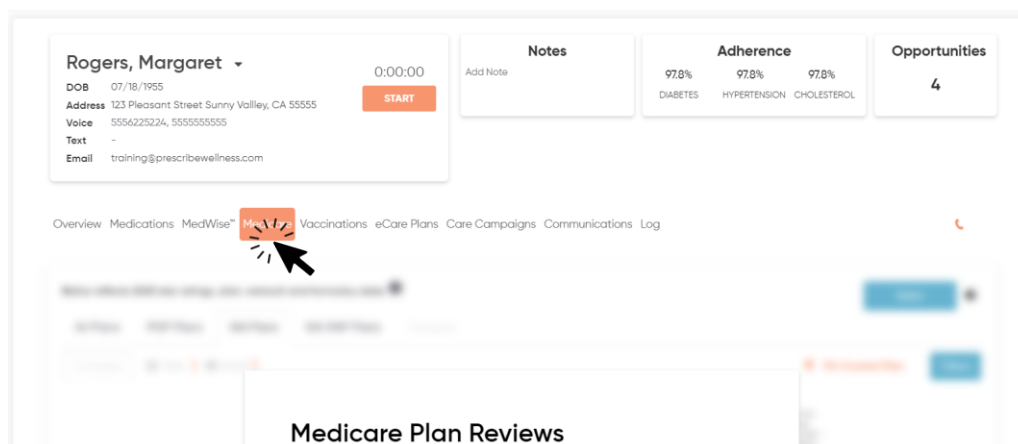
Sort By Total Billed add sorting 10 per page 1 - 10 of 1134

Filtered By Enrollment: Open

Actions Filters

PATIENT	CLINICAL OPPORTUNITIES	AVERAGE COPY	RDC MAINT (DIAB./HYP./CHOL)	AGE (DOB)	MAINT./ACTIVE MEDS (BILLED TOTAL)	NEXT FILL (LAST FILL)
<input type="checkbox"/> Rogers, Margaret Phone: (555) 622-5224	4	\$3.53	100% 97.8%/97.8%/97.8%	67 07/18/1955	9/20 \$42,219.59	11/03/2022 10/10/2022
<input type="checkbox"/> Carroll, Adam Phone: (555) 436-4279	6	\$17.76	99.0% 100%/100%/95.7%	72 07/15/1950	10/19 \$40,289.13	11/03/2022 10/24/2022

To open from the Patient Profile, click on Medicare.



Rogers, Margaret 0:00:00 START

DOB 07/18/1955
Address 123 Pleasant Street Sunny Valley, CA 55555
Voice 5556225224, 5555555555
Text -
Email training@prescribewellness.com

Notes Add Note

Adherence 97.8% 97.8% 97.8%
DIABETES HYPERTENSION CHOLESTEROL

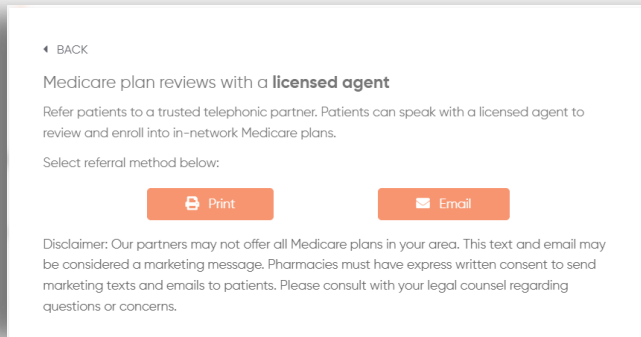
Opportunities 4

Overview Medications MedWise **Medicare** Vaccinations eCare Plans Care Campaigns Communications Log

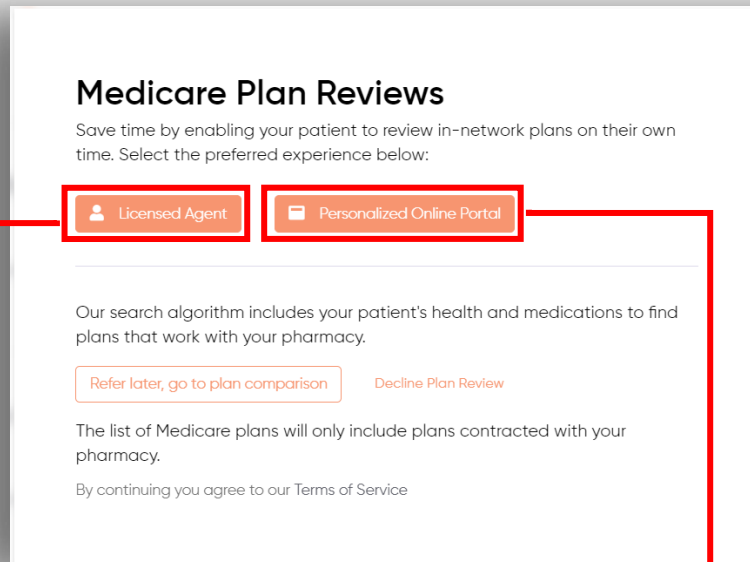
Medicare Plan Reviews

Refer Patients

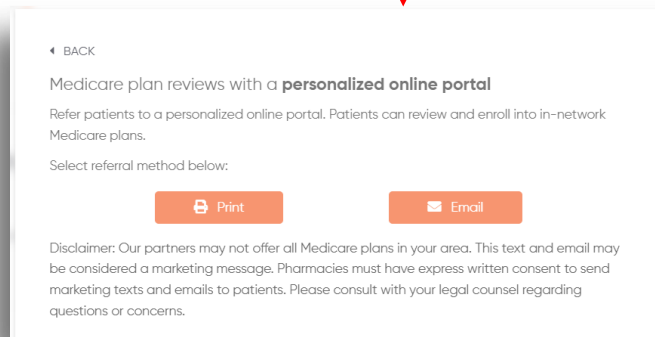
Save time by enabling your patient to review in-network plans on their own time.



Select **Licensed Agent** to email or print a referral to allow your patients to speak to a licensed agent to review and enroll into an in-network Medicare plan.

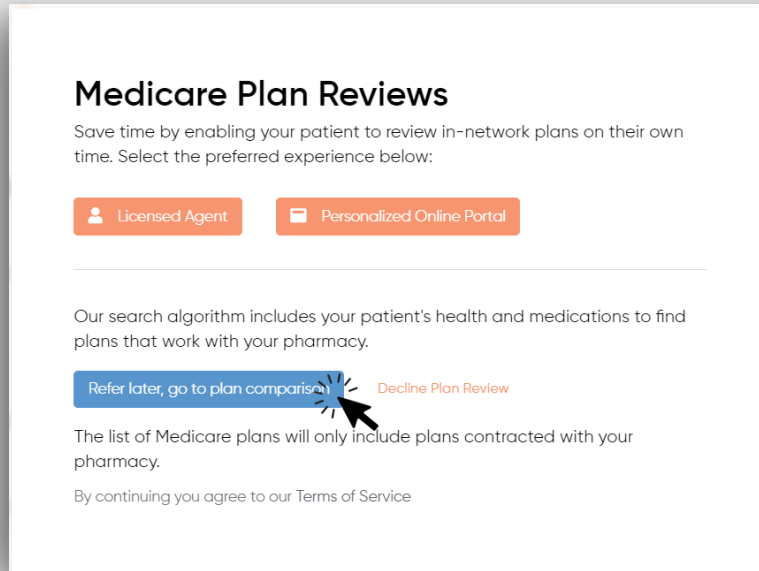


Select **Personalized Online Portal** to email or print a referral to allow your patients to review and enroll into an in-network Medicare plan using a personalized online portal.



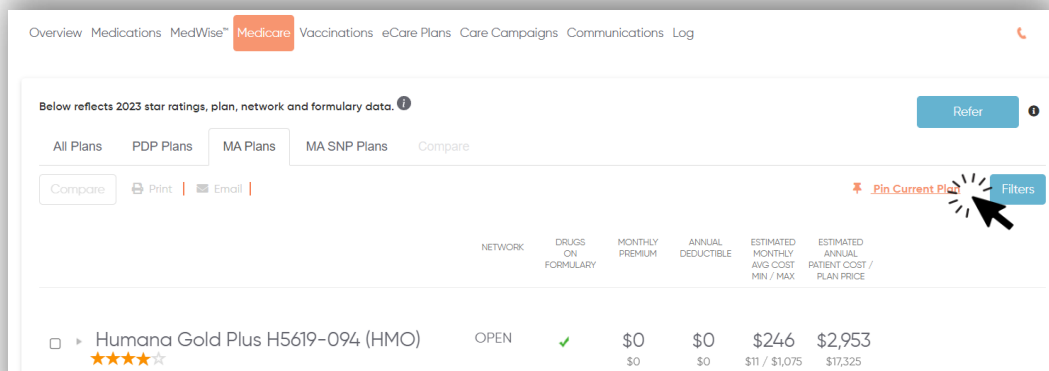
Conduct the Plan Review

To conduct the plan review in the pharmacy, select **Refer Later, go to plan comparison**



Compare to Current Plan

To pin the patient's current year plan and compare with other plans, select **Pin Current Plan** and select the patient's plan for the current year.

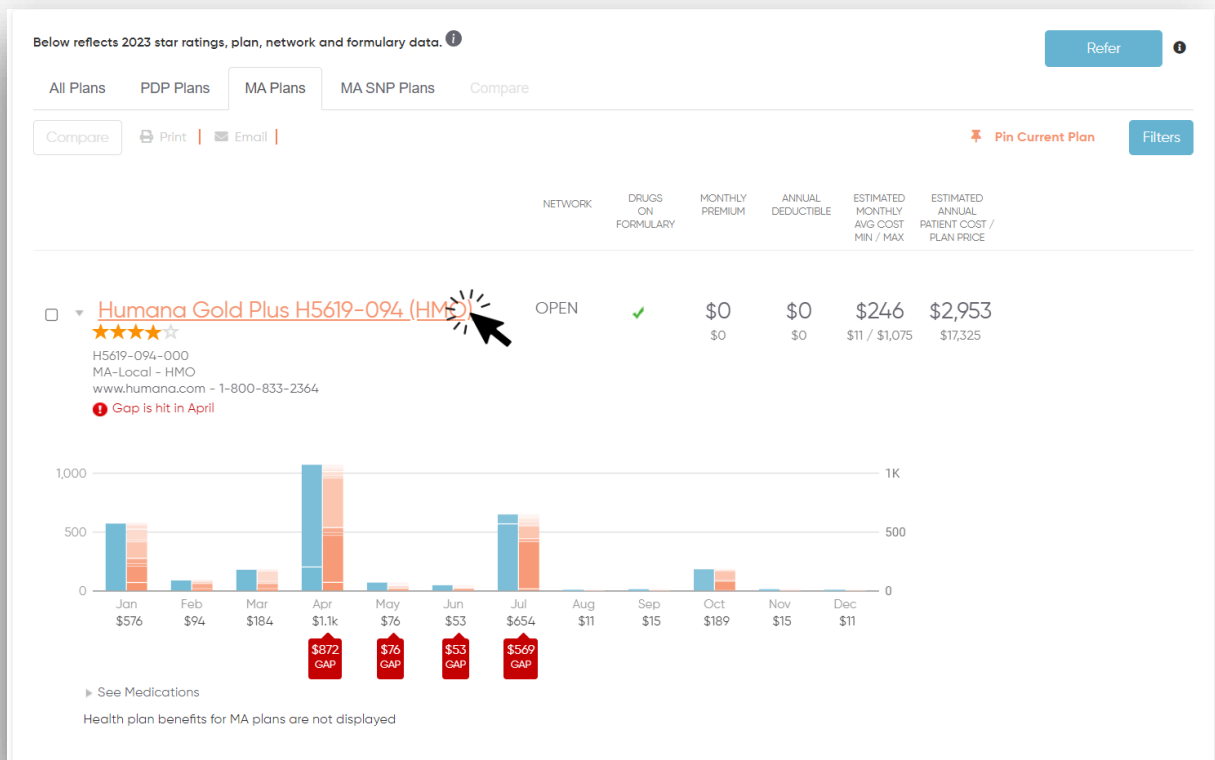


Plan Graph

The plan graph displays a month-by-month cost breakdown for the plan.

The blue bar indicates deductible and premiums costs, and the gold bar indicates the medication costs per month. Any coverage gap (donut hole) cost is indicated in the red tag below the month. Hover over any bar to see detailed cost information.

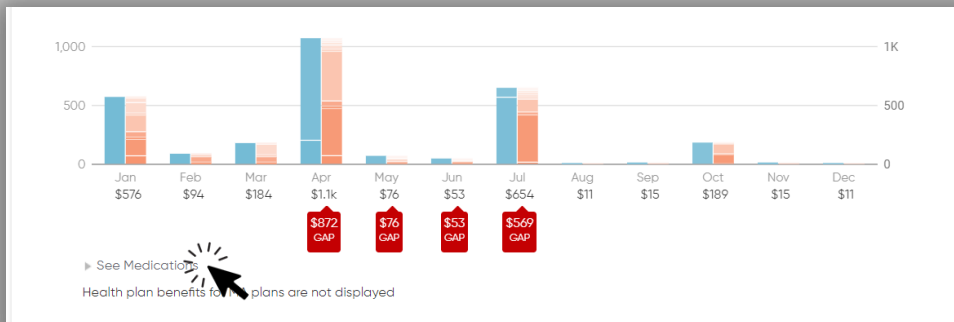
Click on a plan name to view the plan graph.



Medication List

The medication list includes all medications from your pharmacy management system and any patient- reported medications. You can exclude any medication or add another in the Medication Playground.

Click on **See Medications** under the plan graph.



The medication list appears.

DRUG / RX # / NDC	CO PAY / TOTAL	ACTIVE	MAINTENANCE	SYNCED	OVER THE COUNTER	LAST FILL / NEXT FILL	DAYS SUPPLY QUANTITY	SHORT FILL	REFILLS
PHARMACY RECORD MEDICATIONS									
<input type="checkbox"/> Lamivudine 100 MG Oral Tablet 9869295 / 60505-3250 Formulary Tier: 3 Quantity Limit: 30	\$45.00 / \$136.57	✓	✓	-	-	10/24/2022 / 11/23/2022	30 / 30		2
<input type="checkbox"/> Tacrolimus 1 MG Oral Capsule 5749619 / 00781-2103 Formulary Tier: 2 Prior Authorization	\$9.00 / \$62.22	✓	-	-	-	10/24/2022 / 11/23/2022	30 / 60		2
<input type="checkbox"/> Erythromycin 0.005 MG/MG Ophthalmic Ointment 4854067 / 24208-0910	-	-	-	-	-	9/9/2022 / 9/16/2022	7 / 3.5		2
MEDICARE PLAN REVIEWS MEDICATION PLAYGROUND									
None									
PATIENT REPORTED MEDICATIONS									
<input type="checkbox"/> 60 ACTUAT Fluticasone Propionate 0.25 MG/ACTUAT / Salmeterol 0.05 MG/ACTUAT Dry Powder Inhaler Quantity Limit: 60	\$9.00 / \$142.02	✓	✓	-	-	11/1/2022 / -			

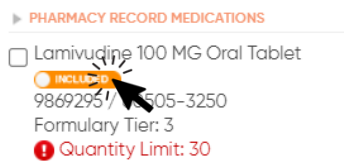
A. Column Headers:

- i. Co Pay: Amount patient pays
- ii. Total: Estimated drug cost
- iii. Active Medication
- iv. Maintenance Medication
- v. Synced Medication
- vi. Over the Counter: OTC Medication
- vii. Last Fill: Last filled date
- viii. Next Fill: Next expected fill date
- ix. Days Supply: Duration of medication
- x. Quantity: Quantity dispensed
- xi. Short Fill: Quantity filled
- xii. Refills: Refills remaining for prescription

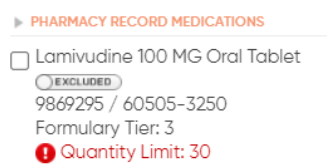
B. Pharmacy Record Medications

Pharmacy Record Medications includes active and recently inactive medications from your pharmacy management system. You can choose which medications to exclude from the plan cost calculations.

Click on **Included** to change a medication status to **Excluded**.

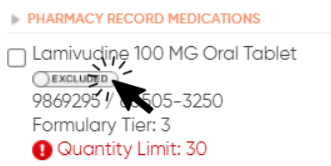


before

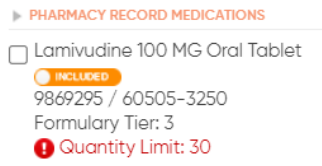


after

Click on **Excluded** to change a medication status to **Included**.



before



after

C. Medication Playground

The Medication Playground gives you an opportunity to see how different medications affect the plan costs without permanently recording these medications.

1. Click on the **Add New...** field and begin typing the desired medication.

▼ Hide Medications

Fax Selected Medications

2. As you type, possible medications will appear in the drop-down menu. Select the desired medication based on indicated formulary tier, restrictions and copay.

Fax Selected Medications

DRUG / RX # / NDC

▶ PHARMACY RECORD MEDICATIONS

0.25 MG, 0.5 MG Dose 1.5 M Is On Formulary: Y
Semaglutide 1.34 MG/ML Pe Formulary Tier: 1 - Requires Prior Authorization: false - Has Quantity Limits: true - CoPay: 0 - CoPayType: 1
Injector [Ozempic]

hydrochlorothiazide 12.5 MG / lisinopril 10 MG Oral Tablet
Is On Formulary: Y
Formulary Tier: 1 - Requires Prior Authorization: false - Has Quantity Limits: true - CoPay: 0 - CoPayType: 1


hydrochlorothiazide 12.5 MG / lisinopril 20 MG Oral Tablet
Is On Formulary: Y
Formulary Tier: 1 - Requires Prior Authorization: false - Has Quantity Limits: true - CoPay: 0 - CoPayType: 1

3. In the pop-up window, enter the desired quantity and days' supply. Then click OK.

We need more info... x

Days Supply

Quantity

Cancel 


4. The medication will appear in the Medication Playground.

▶ MEDICARE PLAN REVIEWS MEDICATION PLAYGROUND

<input type="checkbox"/> Hydrochlorothiazide 12.5 MG / Lisinopril 10 MG Oral Tablet	\$0.00	✓	-	-	-	-	30
<input checked="" type="checkbox"/> INCLUDED	\$1.19						30
Formulary Tier: 1							
Quantity Limit: 30							

5. To update the plan costs with the medication included, select **Click Here to Update Results.**

▶ MEDICARE PLAN REVIEWS MEDICATION PLAYGROUND

[Click Here To Update Results](#) 

Quantity Limit: 30

▶ PATIENT REPORTED MEDICATIONS

D. Patient- Reported Medications

Patient-Reported Medications includes medications reported in the Patient Profile.

Overview **Medications** MedWise™ Medicare Vaccinations eCare Plans Care Campaigns Communications Log

Recent Medication **Patient-Reported Medications** Medication Allergies Medication History Med Time Reminders

+ Add New

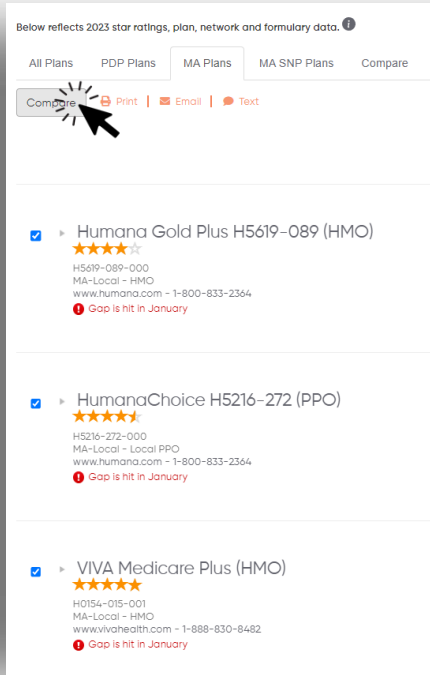
NAME

60 ACTUAT fluticasone propionate 0.25 MG/ACTUAT / salmeterol 0.05 MG/ACTUAT Dry Powder Inhaler
+ Add Note

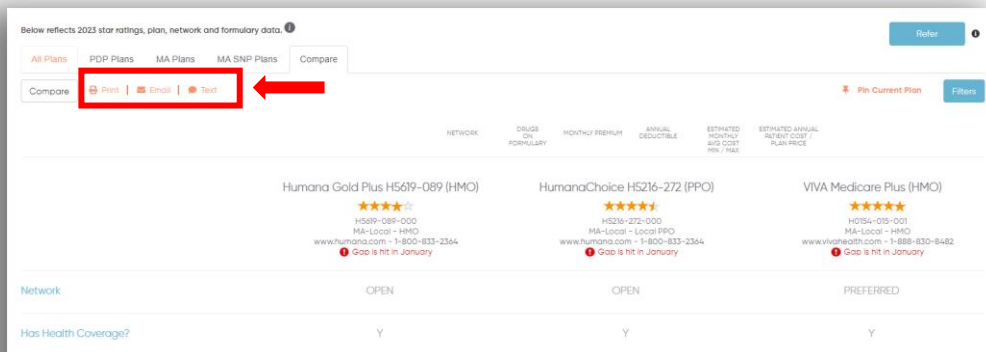
Print Plan Comparison

You can print out plan comparisons if requested by the patient.

1. After selecting up to 3 plans, click Compare to see a side by side comparison.



2. Once you click Compare, you can Print, Email or Text the comparison to the patient.



Best Practices

- Don't steer.
 - You cannot steer your patients, as it's a violation of CMS regulations, but your advice is extremely valuable.
- The patient must complete the online enrollment process into a Medicare plan
 - The pharmacist/staff may not submit an enrollment application on behalf of a patient without legal authority
- Pharmacists/staff may engage in objective discussions with patients seeking advice about their plan options
 - Do not offer any kind of an inducement (financial or other) to persuade a patient to enroll in a particular plan
- Pharmacists/staff may not accept any compensation from a plan for marketing or enrollment activities
- When discussing plans with patients, the pharmacist/staff should remain neutral
 - Answer questions and discuss plan characteristics, including cost-sharing and benefits information
- When in doubt, refer patients to other sources of information, such as [medicare.gov](https://www.medicare.gov).

PrescribeMedicare Service Terms

In accepting the PrescribeMedicare Subscription, Customer acknowledges that it is familiar with the limitations set forth in 42 C.F.R. §§ 422 et seq. (Medicare Advantage Program) and 42 C.F.R. §§ 423 et seq. (Voluntary Medicare Prescription Drug Benefit), including the limitations on the marketing to or steering of its customers to particular plans. Customer agrees to keep informed of and abide by all relevant federal and state regulations and all marketing guidelines established by the Centers for Medicare and Medicaid Services (“CMS”). Customer further agrees to indemnify, defend and hold harmless PrescribeWellness (including its directors, officers, employees, agents and affiliates) from and against any and all claims, liabilities, losses or damages (including reasonable attorney fees, expert witness fees, expenses and costs of settlement) arising out of or with respect to its negligent performance of, or its willful misconduct in connection with, any applicable federal or state law, regulation or CMS guideline.

PrescribeWellness has the authority to revoke access and terminate the Medicare Plan Finder tool (PrescribeMedicare) contractual agreement if the pharmacy does not abide by all relevant state and federal regulations pertaining to the guidelines established by the Centers of Medicare and Medicaid Services.