Level II Eligible Patients: 
Identification and Invitation Strategies

This document is designed to assist you and your colleagues in identifying, contacting, and engaging patients in the Wisconsin Pharmacy Quality Collaborative (WPQC) Medication Therapy Management (MTM) program. It is also designed to assist you in addressing barriers that might prevent patients from participating in the WPQC program.

Remember to review the Motivational Interviewing section in the latter portion of the WPQC Homestudy to help you be successful in engaging patients in MTM services and patient self-management.

<table>
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<th>Overview of Steps for Patient Identification and Engagement</th>
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<td>1. Pharmacy determines patient eligibility</td>
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<td>2. Contact patient via phone, in pharmacy or by mail to offer service</td>
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<td>3. Explain benefits of program; refer to 'Approach Suggestions' below</td>
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<td>4. Schedule patient for CMR/A</td>
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<td>5. Remind patient of scheduled appointment via mail or by phone</td>
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<td>6. Conduct CMR/A</td>
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<td>7. Document visit and bill</td>
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Identification of Level II Eligible Patients:
Pharmacists may identify eligible patients according to the WPQC Program Description criteria. Options to consider for communicating the service offer include:

- **At the counter:** Approach the patient when they arrive to fill or pick up a prescription.
  - Program a note to pop-up on your pharmacy management system when the patient fills a prescription
  - Attach a note or brochure to the patient’s bag to remind you they are eligible, so you can approach the patient when they pick up their prescription

- **Call:** Find the patient’s current phone number through your pharmacy management system and contact the patient via telephone to invite them in for an initial visit

- **Mail:** Prepare a brochure and letter explaining the services offered and how to contact the pharmacy to set up an appointment. Send the information to the patient along with an invitation for them to participate.
**Communication suggestions:**

As your pharmacist, I review your medications to identify, resolve and prevent drug-related problems. Can we set up some time for us to review your medications and your health together?

While I was looking over your list of medicines, I noticed you may benefit from a new service we’re offering here at the pharmacy. It allows you to sit down face to face with one of our pharmacists and discuss your medicines to ensure you are receiving the most benefit from them. (Specifically, I noticed... “you could maybe save some money...,” etc.) We often identify problems people didn’t even know they were having like side effects, problems remembering to take your medicine, necessary/unnecessary medications and drug interactions. Sometimes, we can even identify ways you can save money.

For the most part, we want to make sure we’re doing a good job as your pharmacist by making sure all of your health conditions are being treated and that you know how your medicines work.

Your health plan is sponsoring an exciting program that gives us the opportunity to meet in a private setting to discuss your medications and your health. We normally schedule these services on [date/time]. Would you like me to schedule you for next week/month when you’re scheduled to pick up your next prescription?

Can I share with you how other people have benefited from our visits? Most have learned more about how their medicines work so their health improved. For example, many people have lowered their blood pressure and blood sugar levels and some people have found less expensive but equally effective medicine options.

I could go on and on about the ways we’ve helped people just like you (drug interactions, recommendations based on new medicine guidelines, healthcare empowerment, etc.). What questions do you have? ..... When would you like to come in?

**Handling patient questions and objections:**

*What is Medication Therapy Management (MTM)?*

MTM is a service paid for by your health plan. You meet one on one with the pharmacist who will review your allergies, health conditions, and all medicines and supplements you take, including medicines not filled or purchased at our pharmacy. During this time, you and the pharmacist can talk about topics that are of interest to you or that the pharmacist thinks might help you with your medications.

*Doesn’t my doctor already provide these services?*

We understand the importance of your relationship with your doctor and that’s why we work with all of your doctors to ensure we are on the same page. Your doctor is your medical and health specialist and your pharmacist is your medication expert. Together, we can make sure you are receiving the best care possible.
I thought pharmacists already provided these services.
We already review prescriptions for accuracy, interactions, and appropriateness. This appointment gives us a chance to review all of the medicines you take, including medicines not filled or purchased at our pharmacy, and also for you to ask us questions you may not have had the time or privacy to ask.

My caregiver takes care of my medications.
I’m glad you have someone to assist you. I would like to review your medications to ensure they are the right kind and dose for you and to make sure they all mix well together. If you’d like, your caregiver could join us to address any questions he or she may have about your medications.

Worst case scenario: If you end up in the Emergency Room without your caregiver, it is good to know which medications you are on so your doctors can take better care of you and not give you something you shouldn’t have.

I’m embarrassed; I don’t want to discuss this with my pharmacist whom I know well.
The information we discuss during the meeting will be kept confidential. Some key information will be shared with your doctor(s) and your health plan. Your individual information is not given to your employer and will not affect any of your other health plan benefits.

Participating in the program offers time for us to sit down together in a private, secure setting so we may discuss any questions or concerns you may not have had the time or privacy to ask. (Another possible option: offer to schedule the appointment with another pharmacist the patient doesn’t know as well.)

I just don’t have time.
We completely understand the stresses of having a busy schedule and that’s why we can be flexible and meet when it is convenient for you. The length of the visit will depend on what questions you have and what you and I decide to focus on. Most visits take between 30 and 45 minutes. We can review your top concerns and meet for a follow up if necessary.

I can’t afford it.
There is no cost to you. This program is sponsored by your health plan, who realizes how important face-to-face visits with your pharmacist are. The information we discuss is for your overall well-being.

What’s next?
Let’s schedule a meeting!

What should I bring to the appointment?
Please bring all of the medicines you take, even if you get them from another pharmacy, in the mail or from the internet including over-the-counter medicines and supplements.

Also, if you have print-outs from recent clinic visits or lab tests, those would also be helpful to bring. (Eg: My Chart) If you are diabetic, please bring your glucose meter or log books.

Please give us a call if something comes up and you cannot make it to our appointment. We will call you the day before the appointment to remind you of the visit.