



# Patient and Caregiver Engagement

- Explain the value of participating in the service.
- Describe the Features and Benefits of a CMR/A.
- It is important to tie the features to how it specifically benefits the patient. This makes it relevant and increases the likelihood of CMR/A acceptance.

## **CMR/A Features (numbered) and Benefits (bulleted):**

1. Financial benefits
  - Service is covered by your insurance
  - Sometimes we can find ways to save you money on your medications
2. Private visit
  - Undivided attention of the pharmacist to discuss your questions and concerns
  - The pharmacist is an expert and can help you with any medication-related concerns you have about your health
3. Personalized review of all medications including herbals, supplements and OTC's
  - Identify unnecessary medications if appropriate
  - Make sure you are getting the most from your medications
  - Reduce or avoid side effects
  - Double check that your medications do not interact with each other
  - Help you remember to take your medications
4. Receive a Medication Action Plan and updated Medication List after the visit
  - Summary of the visit findings and your next steps
  - Updated and complete list of your medications to share with all your providers
5. Communicate with your doctors
  - Ensure you are receiving the best care possible.
  - Get their approval before making any medication changes

## **Sample Language:**

*“A Medication Check-Up” is a service that is covered by your insurance and is no charge to you. It allows you to meet privately with me, your pharmacist, to review all of your medications. This includes a video call. A Medication Check-Up involves a personalized review of all your medications including any herbals, supplements and OTCs you may be taking to make sure they work well for you. You can ask me any questions that you may have about your medications. At the end the review, you will receive a Medication Action Plan summarizing the visit as well as an updated medication list. We will also communicate with your doctors regarding any suggestions I may have for medication changes.”*

# Completing the Review

- Follow a **checklist** to ensure that nothing is forgotten.
- Ask the patient to gather all of their medications before you begin, including over-the-counter medicines, inhalers, and topical ointments.
- Ask the patient what their goals for the visit are. When using video, you could ask the patient to write down their goals and show it to you on the screen.
- When using video calls, demonstrate and briefly practice how to turn on and off the microphone and/or camera with the patient. If the connection is delayed, you can explain and demonstrate how to off the video to help improve the visit.
- Encourage the patient to provide the medication list, including purposes, to you in order to actively engage the patient and to assess their initial understanding.
- **Teach-back education** can be an effective method for educating patients, whether in person, over video or telephone. This technique can help patients recall and understand more information, increase their satisfaction with the interaction, and gain their trust.
- To use teach-back education, use plain language and avoid jargon, ask open-ended questions (think **Motivational Interviewing**).
- Check for comprehension after explaining important points, and encourage patients to use their own words.
- Ensure the patient knows your goal is to assess how well you explained the information and to make sure they understand everything discussed.
- -Offer to make a summary of your meeting (after visit summary or action plan) available through the patient's portal or by mail. Ask the patient what is their preferred method of delivery if they would like the summary.

## Sample Language:

*"Before we start, please make sure you have all of your medications including:*

- *Prescriptions*
- *Inhalers*
- *Over-the-counter medications*
- *Topical ointments*
- *Herbal remedies*

*Having everything together will help us as we review each item. It will also help you think about any questions you may have for me during our discussion."*

# Engaging Providers

- Introduce yourself to the primary care provider to facilitate a collaborative relationship.
- Explain the **many benefits** of the increased value of having a pharmacist closely involved in the patient's medication management.
- Collaborating closely with the patients' primary care providers in the delivery of telehealth services is vital in order to ensure the pharmacist's recommendations are acted upon and continuity of care is further ensured.
- Relaying medication related recommendations to patients' providers can occur via several methods, including: fax, phone, secure email, documentation in the electronic health record or a patient portal. It's important to determine which method would be most effective and convenient for the providers you'll be working alongside.

## **Sample Language:**

*“Dear [provider name], My name is [your name]. I am a pharmacist at [Pharmacy location]. Your patient [patient name, DOB] was seen for a comprehensive medication review via telehealth today. A possible change in medication therapy was identified. Please consider these recommendations and respond via fax [fax number] or telephone [phone number].*

# Finishing the CMR

Check in with the patient to make sure they are well supported during the COVID-19 pandemic. This is a great opportunity to use motivational interviewing to encourage basic public health prevention steps. There are community resources you can refer them to if you identify unmet needs.

## Sample Language:

*Before we finish today, I want to make sure you have everything you need to stay healthy during COVID-19 Safer at Home.*

- *Are you having any symptoms of COVID-19?*
- *If yes, review the symptoms and local process to get care.*
- *Do you have all your medications and supplies for up to 2 months?*
- *Review precautions for staying safe.*
  - » *Wear a well-fitting face mask*
  - » *Wash/sanatize your hands regularly*
  - » *Maintain 6ft distance with those not in your close circle*
- *How are you managing stress? If needed refer to primary care provider for care.*
- *Do you have enough food?*
- *Do you need help with getting food? If yes, refer patient back to the agency they currently work with or [United Way's 211](#) or the [Aging and Disability Resource Center \(ADRC\)](#)*
- *Reinforce healthy eating and ways to get exercise.*
- *Keeping as normal a routine as possible.*

# Helpful Tips

## Utilizing Supplemental Staff:

Medical assistants, pharmacy technicians, etc. can help with:

- Scheduling visits
- Emailing the links to patients
- Patient check-in on the day of the appointment
- Assisting patients with telehealth platform login

## Using Two Computers

- One can be used for video visit (can be iPad/tablet)
- One can have EHR system pulled up

## Tips for Preparing Your Patient for a Telehealth Medication Review

When scheduling, explain how the telehealth visit will work. Include detailed instructions on the following:

- How you will communicate with them in advance of the medication review appointment
- How to access your telehealth platform (i.e. email with link, download app/software)
- What to expect from a comprehensive medication review
- **What to bring** to the review including:
  - » Prescription medications
  - » Inhalers
  - » Over-the-counter medications
  - » Herbal supplements
  - » Medication supplies

Consider sending an email to confirm the details above. See template [here](#).

Assure the patient that if the technology fails, you will complete the review via telephone.



## How does HIPAA and Telehealth Privacy Work?

All HIPAA Rule protections applied to the provision of in person health care is applicable to telehealth. During a telehealth appointment, all HIPAA covered health care providers are expected to protect the privacy and confidentiality of the patient in accordance with HIPAA Rules. However, during the COVID-19 pandemic, the Health and Human Services (HHS), Office of Civil Rights (OCR) recognizes that telehealth services are necessary, but may not in all situations, fully comply with HIPAA. As a result OCR has issued a [statement](#) saying they will enforce HIPAA rules with discretion to ensure essential health care is delivered during this national health emergency. OCR has provided [guidance](#) on HIPAA compliant telehealth platforms and additional protections available to health care providers using telehealth communication technologies. They have also provided additional direction in a published [bulletin](#) advising covered entities of both flexibilities available and obligations that remain in effect under HIPAA. OCR also suggests that HIPAA covered health care providers who would like additional privacy protections for telehealth while using video communication products should provide such services through technology vendors that are HIPAA compliant and will enter into HIPAA business associate agreements (BAAs) in connection with the provision of their video communication products. The list below includes vendors that state they provide HIPAA-compliant video communication products and some vendors that will enter into additional HIPAA BAA with covered health care provider entities.

## Is a Telehealth CMR/A reimbursable through WI Medicaid?

Yes, WI Medicaid Temporarily Approves Telehealth for CMR/A Services. Wisconsin ForwardHealth will temporarily allow CMR/A services to be provided via telehealth. Here are the high points, but the Forward Health alert is available in full [here](#).

1. For the duration of the Wisconsin public health emergency for COVID-19, ForwardHealth will allow telehealth services utilizing interactive synchronous (real-time) technology, including audio-only phone communication, for currently covered services that can be delivered with functional equivalency to the face-to-face service. This applies to all service areas and all enrolled professional and paraprofessional providers allowable within current ForwardHealth coverage policy. Services that are not currently covered on a face-to-face basis are not covered via telehealth.
2. Providers may use any non-public facing remote communication product that is available to communicate with patients. Public-facing video communication applications, such as Facebook Live, should not be used in the provision of telehealth. Providers are encouraged to let patients know that these third-party applications can introduce privacy risks. Providers should also enable all available encryption and privacy functions when using such applications.
3. Providers may not require the use of telehealth as a condition of treating a member. Providers must develop and implement their own methods of informed consent to confirm that a member agrees to receive services via telehealth. ForwardHealth considers verbal consent to receiving services via telehealth an acceptable method of informed consent when it is documented in the member's medical record.
4. As a reminder, the POS (Place of Service) is where the provider is located.



## How do I choose a telehealth platform for my practice?

There is a lot to consider when determining which telehealth software platform to purchase for your practice. Before making a purchase, make sure to arrange for a live demonstration of the software with the company. Have a list of desired features and questions ready so you can get all the information needed to make an informed decision. Some things to consider as you make this decision include:

1. What is the **complete** cost of the telehealth software platform?
2. What functionality does the telehealth platform have?
3. Is the platform easy to use for my staff **and** for my patients?
4. Am I able to customize the platform to fit my practice needs?
5. What support services does the company offer and how much do they cost?
  - a. Does the company offer software platform implementation support?
  - b. Does it offer ongoing technical support for your staff?
  - c. Are patients supported as well?
6. Is there a free trial period to test the software to make sure it is a good fit for my practice?

## Pharmacy Telehealth Vendors\*

There are several Telehealth vendors on the market. [Here](#) is a limited list of HIPAA compliant Telehealth vendors developed by the Department of Health and Human Services. Below are some of those HHS listed vendors with additional technology information for your reference.

### Pharmacy Telehealth Vendors\*

<i>Name</i>	<i>Resources</i>	<i>Cost</i>	<i>HIPAA Compliant</i>	<i>HIPAA BAA Available</i>
<b>Doxy.me</b> With accessibility in mind, we have made Doxy.me extremely simple and easy to use for both clinicians and patients.	<a href="https://doxy.me/">https://doxy.me/</a>	Free	Yes	Yes <a href="https://doxy.me/features">https://doxy.me/features</a>
<b>Updox</b> Updox Video Chat allows our practice to offer secure communications with our patients.	<a href="https://www.updox.com/who-we-serve/pharmacy-software">https://www.updox.com/who-we-serve/pharmacy-software</a>	Yes	Yes	Yes <a href="https://www.updox.com/plans-packages">https://www.updox.com/plans-packages</a>
<b>VSee</b> VSee is more than a telemedicine platform. We're people who believe in the power of telemedicine to save money, save lives, and improve healthcare.	<a href="https://vsee.com/">https://vsee.com/</a> <a href="https://vsee.com/virtual-care-solutions/">https://vsee.com/virtual-care-solutions/</a>	Yes	Yes	Yes <a href="https://vsee.com/hipaa">https://vsee.com/hipaa</a>
<b>ZoomHealthcare</b> Zoom for telehealth reliably delivers consistent clinical user experiences, seamlessly integrates into your technology and workflows, and keeps you connected and compliant.	<a href="https://zoom.us/healthcare">https://zoom.us/healthcare</a>	Yes	Yes	Yes <a href="https://zoom.us/healthcare">https://zoom.us/healthcare</a>

\*This is a limited list of Telehealth vendors and is intended to be used as a resource only. PSW does not endorse the use of any of these platforms.