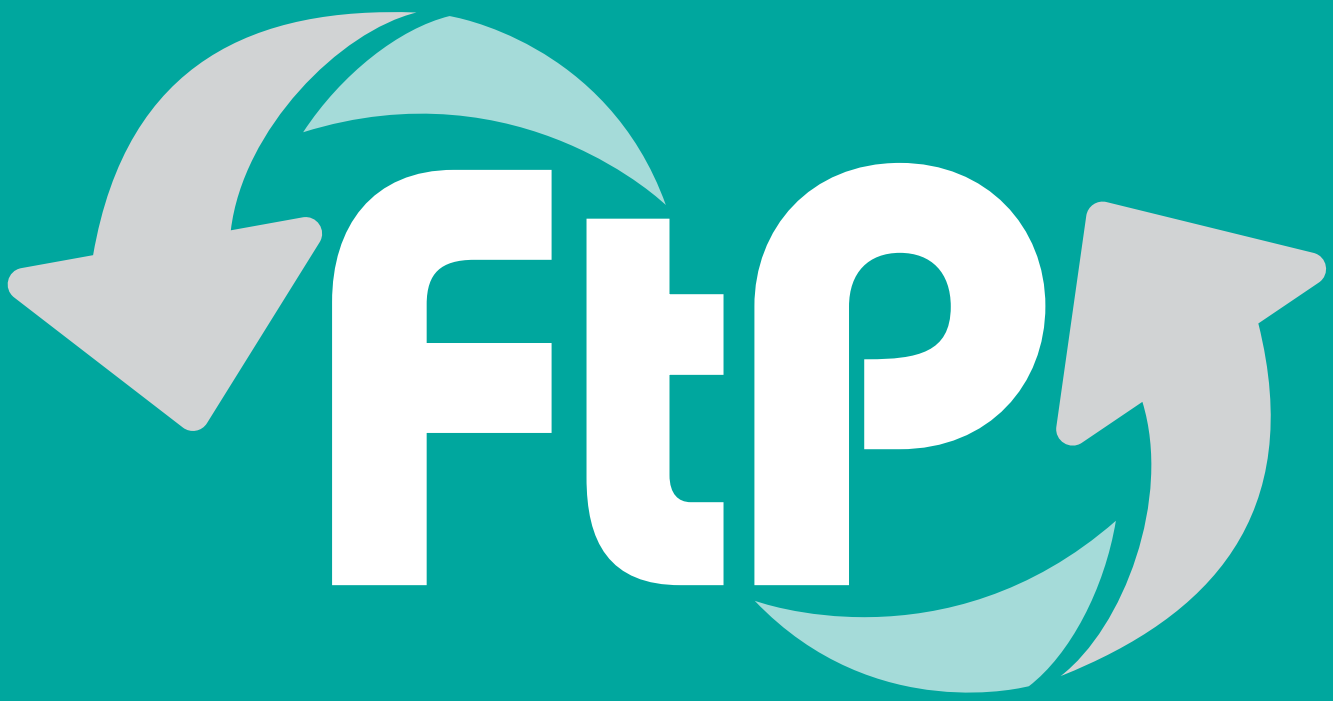
Moving beyond Filling Prescriptions at a Moment in Time, to **Caring for Patients** over Time



Change Package

January 2020

Community Pharmacy Foundation

www.flipthepharmacy.com

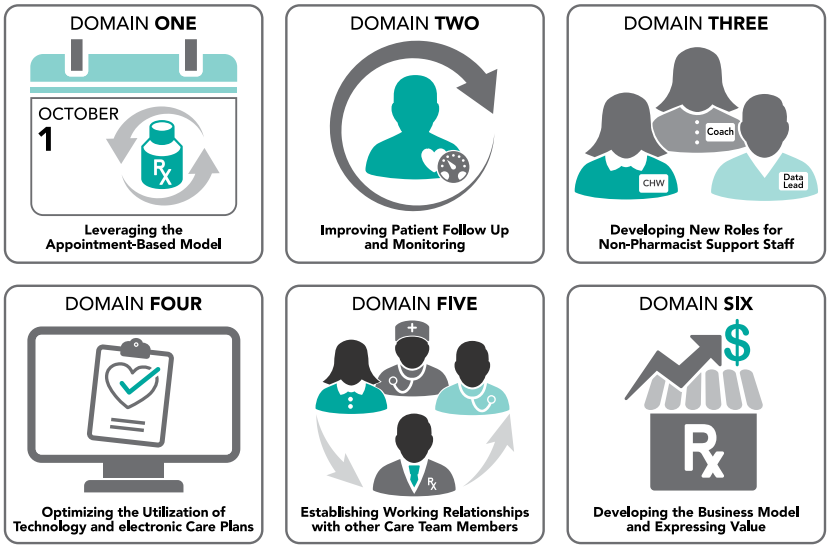
CPESN

Welcome to the **Flip the Pharmacy** Change Package

Pharmacy practice transformation requires big changes. This **Change Package** is your guide for practice transformation. This **Change Package** is designed to offer you a stepwise approach to help you transform 3 key areas of your pharmacy:

1. Your Workflow
2. Your Patient Care Processes
3. How you lead your Business

The **Change Package** will provide you focused practice transformation activities to develop each of the 6 Domains.



Each month, the **Change Package** will prescribe specific steps to help your team implement workflow innovations designed to assist your pharmacy with implementing patient care processes.

Here's how to make it work:

- Each month:
  - Review and lead team through the **Change Package**
  - Keep your entire team engaged in the Domain focus of the month
  - Complete your **Change Package** monthly requirements, if you are part of the flip the pharmacy cohort
- As needed:
  - Check in with your coach for near-real time feedback, if you are part of the flip the pharmacy cohort

DOMAIN **FOUR**

Optimizing the Utilization of Technology and electronic Care Plans

Domain 4: ***Optimizing the Utilization of Technology and electronic Care Plans*** – The eCarePlan is fundamental to the successful operationalization of all Domains. Working hand in hand with software companies, pharmacies should develop best practices documentation processes.

Domain 4: *Optimizing the Utilization of Technology and eCare Plans*

Progression 1: *Level Set and Preparation*

Monthly Focus

How do you implement, utilize and optimize technology within your community pharmacy practice to improve efficiencies?

January's monthly focus is to level set and prepare.

- This month the Change Package will help you begin to **maximize the technology tools you already have** to build a more efficient pharmacy operations or workflow.

Your workflow must be anchored by patient care processes yet still support dispensing tasks.

Technology can assist you in creating necessary process efficiencies and supporting eCare planning. eCare plans are as essential to community pharmacy's success as is using the technology that allows you to dispense medications.

Flip the Pharmacy: Required Monthly Goals

- ☐ **Document 25 eCare plans** related to follow up of blood pressure measures
- ☐ **Listen to the ThriveSubscribe Podcast** Episode 14: ***Optimizing the Use of Technology***
- ☐ Complete the **Technology Checklist**

INVOLVE YOUR TEAM! Share the monthly focus and goals with your team.

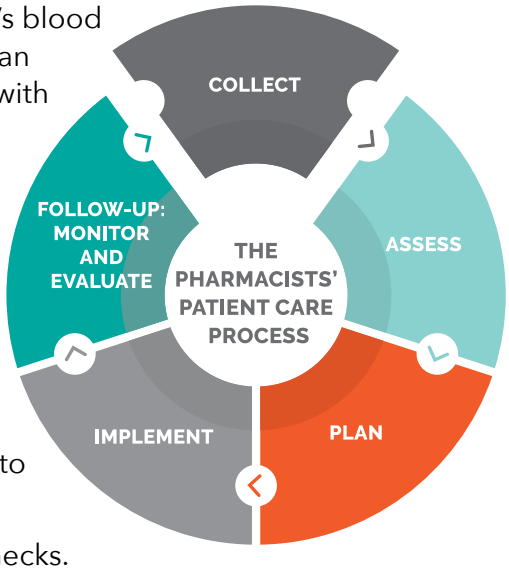
- **Team Huddles:** Join the team together for a short 5 minute team huddle to share information.
- **Newsletter:** Share details and post for all to see.
- **Designate a champion:** This person will lead the change and handle team questions.

Ask your coach if you need more details!

Workflow Innovation:
Collect, Document and Follow up on Blood Pressure Measurements

The workflow innovation this month is a continuation of last month's blood pressure measurements. This month you will also have a tool you can use to share information on recent blood pressure measurements with patient's prescribers.

You'll need to document at least 25 eCare plans throughout the month that relate to blood pressure measurement follow up. Participating in the workflow innovation outlined below will ensure you achieve this required goal.



STEP ONE: Find your patients

Here is a list of ideas for how to integrate blood pressure checks into your workflow.

- Follow up with patients from last month's blood pressure checks.
- Review all patients during the Medication Synchronization pre-appointment preparation.
- Ask patients who pick up their medications for their recent blood pressure measurement – or – offer to check their blood pressure.
- Run a report for patients on anti-hypertensive medications. Consider calling them to let them know they can come in on a specific date and time for a blood pressure measurement. This would be a great way to engage a student pharmacist in practice transformation!

STEP TWO: Collect Blood Pressure Measurements

Ideally, you will follow up on Blood Pressure Measurements during your medication synchronization pick up or pre-appointment preparation. Utilize the care plan documentation form on page 16. Write the names of the blood pressure medications on the sheet and attach to the patient's bag of medications. Address when the patient presents to the pharmacy.

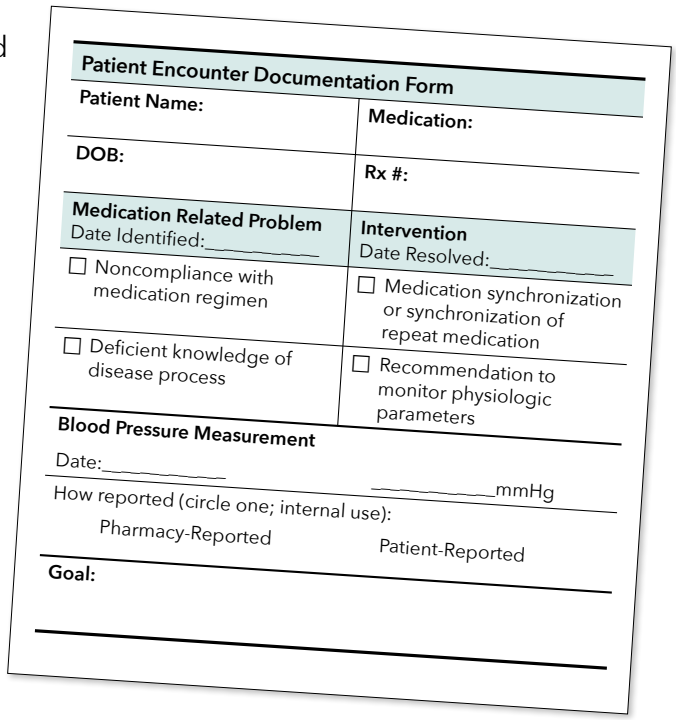
- During the pre-appointment preparation step of Medication Synchronization, let the patient know they are able to receive a blood pressure measurement at their prescription pick up.
- Ask patients and caregivers for a patient reported or provider-reported measure.

ACTION ➔ Create a Stop to Check!

If you haven't yet implemented a hard stop or "trigger" to check for a blood pressure measurement, consider implementing that now. If you have – assess how it is working and ensure efficiencies.

Create a stop for patients diagnosed with hypertension to ensure Blood Pressure is collected (either verbally reported by the patient or measured by the pharmacy).

- **Add a bag tag** on the patients monthly medications
- **Use the Encounter Form attached to a bag as a hard stop** or trigger to collect a blood pressure
- **Add an input notification** within a technology platform



Patient Encounter Documentation Form	
Patient Name:	**Medication:**
DOB:	**Rx #:**
Medication Related Problem Date Identified:_____	**Intervention** Date Resolved:_____
☐ Noncompliance with medication regimen	☐ Medication synchronization or synchronization of repeat medication
☐ Deficient knowledge of disease process	☐ Recommendation to monitor physiologic parameters
Blood Pressure Measurement	
Date:_____	_____mmHg
How reported (circle one; internal use):	
Pharmacy-Reported	Patient-Reported
Goal:	

STEP THREE: Document Blood Pressure Measurement

Document and Share the information with patients *and* prescribers.

- After blood pressure is measured, use the **patient encounter documentation form** to document initially and then document within your eCare Plan documentation system.
- Blood pressure measurements could be pharmacy-reported, patient-reported or provider reported (as in the January Case).
  - Even though you are unable to document which type within the eCare Plan documentation systems currently, you can document how the blood pressure was reported on the patient encounter documentation form.
- Share the information with the patient's prescriber. Use the Patient Blood Pressure Log on the following page to share recent blood pressure measurements.
  - This Log is not intended to replace eCare Plan Documentation of BP Readings.
  - The Log is intended to be an additional document to provide clinical data to provider in a condensed way instead of sending the entire care plan.
  - The Log may also be provided to a patient as a documentation sheet for BP readings.
  - The Log may be used as an editable PDF on your computer or printed for writing.

Patient Blood Pressure Log

Patient Name:_____ Date of Birth: _____

Pharmacy Name: _____ Pharmacy Phone: _____

Date	Time	Blood Pressure	Comments	Reporting method (circle or check one)
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider
				Patient Pharmacy Provider

TIPS TO GET AHEAD!

TIP → **eCare Plan documentation goals may begin to increase in future progressions so be sure you are setting a strong foundation now. If you need help, contact your coach.**

TIP → **Be sure to attend the technology webinars each month.**

We encourage all Pharmacy Champions to **attend technology webinars** for tips, best practices and sharing on eCare Plan documentation specific to your technology partner. If you are unable to attend, be sure to look out for the **Workflow Wednesdays email** provided by CPESN USA to view the demonstration of how to document this in your platform.

HOW TO:

How to Document Your Blood Pressure Measurement

Step 1: Print and Implement Use of the Patient Encounter Documentation Form *(page 15)*

- Print out multiple copies and cut out and distribute to your pharmacy staff members involved in the appointment-based model workflow.

Step 2: Document 25 eCare Plans with Collected Blood Pressure Measurements

- Be sure to first complete the sample eCare Plan and submit to CPESN® USA. This needs to be done prior to proceeding with documenting collected blood pressure measurements.
- The Patient Encounter Documentation form is to help you document your patient encounters on paper initially within workflow. This allows you to document on-the-go and then in your eCare Plan.

Patient Encounter Documentation Form	
Patient Name: French Fry	**Medication:** lisinopril
DOB: 1/13/1979	**Rx #:** 00-000000
Medication Related Problem Date Identified: 12/2/2019	**Intervention** Date Resolved: 12/2/2019
☐ Noncompliance with medication regimen	☐ Medication synchronization or synchronization of repeat medication
☐ Deficient knowledge of disease process	☑ Recommendation to monitor physiologic parameters
Blood Pressure Measurement Date: 12/2/2019	120/82 mmHg
How reported (circle one; internal use): (Pharmacy-Reported)	Patient-Reported
Goal: Check BP on home monitor once a day at different times.	

Level Set and Preparation for Optimizing the Use of Technology and eCare Plans

Reengineering your pharmacy to optimize the use of technology will take time to evolve. **These 2 tools, the podcast and checklist**, are meant to help you level set and prepare your pharmacy for change to support Flip the Pharmacy.

Step 1: Listen to the ThriveSubscribe Podcast Episode 14: *Optimizing the Use of Technology in Community Pharmacy Practice*

- Listen to this 45 minute podcast, ***Optimizing the Use of Technology in Community Pharmacy Practice***, to hear from your peers about what they are doing to maintain and evolve their technology.
- This podcast is a recorded version of the Subject Matter Expert call that occurs each month to shape the direction of the Change Package! **Listen in for a level set of necessary technology needs** as well as the chance to hear how this group of visionaries provides insight for Progression 1 of the Technology Domains.

ACTION → The Pharmacy Champion is required to listen to the podcast. The Pharmacy Champion can share with any other members of the team that may be interested. The Podcast is available on ThriveSubscribe which is available via iTunes and Soundcloud. Click the orange box below for direct access.

Step 2: Complete the Technology Checklist

How do you implement, utilize and optimize technology within your practice to improve practice efficiencies? **Your goal is to create an efficient in practice so you can flip your workflow to be patient focused vs. prescription focuses.**

Check off each item on the list below to create your plan:

- **Review the list** of Technology best practices (on the following page)
- **Evaluate** which items you can implement in you pharmacy and the impact they will have to create workflow efficiencies allowing more time for patient care
- **Email your coach** with the top 1-2 items you think can impact your practice and why. Discuss how to overcome any implementation challenges with your pharmacy's coach.

Technology Check List

- ☐ **Work with your technology vendor** to optimize your current technology tools
- ☐ **Maximize ability to toggle** between various resources.
  - Use keyboard short cuts
    - **"Alt-tab"** will allow you to quickly toggle between the current window and your last viewed window.
    - **"Ctrl-alt-tab"** will allow you to display an overlay screen with all windows programs. You can hit tab to toggle between them.
  - Add a screen at the pharmacist station so there are 2 monitors. This helps with the number of tabs you need to have open at all times.
- ☐ **Implement a messaging system** for staff communication. Looking for options? Click below.

CLICK HERE FOR OPTIONS

  - **Note:** To learn more about this and why it is helpful – be sure to listen in to the podcast episode linked on page 10!
- ☐ **Review automation options.** Even if you can't yet secure automation, review existing options and prioritize which is right for your pharmacy.

CASE INSTRUCTIONS: Let's Practice!

Patient Case Materials

Step 1: Review the Persona for French Fry (next page)

- The persona is intended to help give pharmacies a picture of a real patient who may be visiting your pharmacy. You will see French Fry in future cases as we will build upon this case.
- Please note that the medication related problem, intervention, and goal sections have different color text. This particular information is reflective in the patient case. The intent is for you to realize the patient care aspects that you are performing can be correlated into the eCare Plan *(see Sample Care Plan Case)*.

Step 2: Complete the Sample Care Plan

Please document the sample patient case before moving on to documenting real patients.

- The case includes the pertinent information that will be included in the care plan documentation within your respective platform
- The boxed text at the top of the case that review French Fry is information pulled from the persona that helps us to note the important information for the care plan.
- Goals Detail: The free-text that you type in to the care plan that is individualized for each patient. The intent of the goal is to help achieve the intervention that is being set.

PERSONA #1.4

French Fry

Optimizing the Utilization of Technology and electronic Care Plans

DATE OF BIRTH: January 13, 1979
RACE: White
GENDER: Male
OCCUPATION: College Professor
ADDRESS: 241 Cheeseburger Hwy, Pickle Junction, OH 00000
PROBLEM LIST: Hypertension. Overweight (calculated BMI = 29.6)

HISTORY OF PRESENT ILLNESS

FF was diagnosed approximately one year ago with essential hypertension following complaints of headaches that persisted for several days. FF visited his primary care provider, Dr. Wellness, who wants him to monitor his blood pressure over the next month because it seems uncontrolled.

In October, FF was enrolled into medication synchronization.

PAST MEDICAL HISTORY

Right ankle—torn ligaments—multiple episodes, Left knee—torn meniscus X 3, hypokalemic

ACTIVE MEDICATIONS

Lisinopril/HCTZ 20/12.5—2 tablets every morning, Amlodipine 5 mg every morning, Potassium Chloride 20 mEQ—2 tablets every morning.
Prescriber: Coach Wellness, MD

FILL HISTORY

All medications were synchronized and filled on the same day for a 30 day supply with a start day of 10/15/19. Even though previously nonadherent, FF is now adherent.

ALLERGIES

- Penicillin

SOCIAL HISTORY

FF works as a college professor. He has never smoked and, on average, has 2 alcoholic drinks/week. He doesn't exercise and admits little physical activity.

VITAL SIGNS AND LABS

- **Vital signs:**
  Provider-Reported BP (1/10/20): 144/90 mmHg
- **Renal:** Blood work was completed, but not requested so unaware of lab results
- **Basic metabolic panel:** completed (pharmacist unaware of results)

MEDICATION RELATED PROBLEM(S)

FF has been monitoring his blood pressure at home. **FF has been educated further about high blood pressure. Today, the high reading at the PCP's office was discussed and elevated blood pressure was documented within FF's eCare Plan.**

INTERVENTION(S) AND EDUCATION (RECOMMENDATIONS)

FF remains adherent to his medications due to the medication synchronization process.
FF will continue to take his blood pressure at home per the goal below and communicate to the pharmacy staff.

GOAL

Over the next week, self-check blood pressure one time in the morning and one time in the evening. Document blood pressure and provide the updates to the pharmacy.

MONITORING PLAN AND FOLLOW-UP

Pharmacy staff will follow-up with FF to make sure he is taking his blood pressure and document the blood pressure readings within the eCare Plan and appropriate follow-up will occur with Dr. Wellness.

Sample Care Plan Case

French Fry recently had a follow-up appointment with Dr. Wellness, his primary care provider. Dr. Wellness recommended FF monitor his BP over the course of the next month leading up to February. FF's BP was elevated, 144/90 mmHg, at his appointment on January 10, 2020.

Since FF has been traveling today for his doctor's appointment, he stops by the pharmacy and picks up his medications for the month, which begins on Sunday (1/12/20). He provides the pharmacy staff with the information from his doctor's appointment. The BP reading from the appointment was documented in the patient's eCare Plan and the medication related problem, elevated blood pressure, was documented.

Goal over the next week, FF needs to check his blood pressure one time in the morning and one time in the evening. Document blood pressure and provide the updates to the pharmacy.

Encounter Reason: Taking Patient Vital Signs (SNOMED CT: 61746007)

Encounter Reason: Medication monitoring (SNOMED CT: 395170001)

Patient Demographics:

Patient First Name: French **Patient Last Name:** Fry **Patient DOB:** 1/13/79

Address: 241 Cheeseburger Hwy **City:** Pickle Junction **State:** OH **Zip:** 00000 **Phone:** 919-555-5555

Allergies: Penicillin

Prescriber Information:

Name: Coach Wellness, MD **Address:** 222 Healthy Shores Ln, Pickle Junction, OH 00000

Phone: 999-999-9999 **NPI Number:** 1234567890

Active Medication List:

Medication Name	Directions	Prescriber
Lisinopril/HCTZ 20/12.5 mg	2 tablets every morning	Coach Wellness, MD
Amlodipine 5 mg	1 tablet every morning	Coach Wellness, MD
Potassium Chloride 20 mEQ	2 tablets every morning	Coach Wellness, MD

Medication Related Problems (MRPs) and Interventions:

- **MRP (10/15/19):** Noncompliance with medication regimen (SNOMED CT: 129834002) – (status: COMPLETE)
  - **MRP Note:** Patient is about 15 days late filling lisinopril/hctz 20/12.5 mg. Amlodipine and potassium are filled on different days. FF doesn't seem to be consistent with timing and frequency of refills.
- **Intervention (10/15/19):** Medication synchronization/synchronization of repeat medication (SNOMED CT: 415693003) – (status: COMPLETE)
  - **Intervention Note:** FF is being enrolled into our sync program and we will be aligning his medication fills on the same day each month with follow-up calls at least 5 days prior to next refills.

- **MRP (11/11/19):** Deficient knowledge of disease process (SNOMED CT: 129864005) – **(Status: Complete)**
  - **MRP Note:** FF states that he does not know what his blood pressure (BP) goal is, and FF has not been monitoring his BP at home because he does not have a device.
- **Intervention (11/11/19):** Recommendation to monitor physiologic parameters (SNOMED CT: 432371000124100) **(Status: Active/In-Progress)**
  - **Intervention Note:** FF likes the idea of self-monitoring his blood pressure at home after further discussion and education. FF states he wants to purchase a blood pressure monitoring device and wants it delivered with his medications. The pharmacist asked if he would be willing to come into the pharmacy to get his blood pressure checked, but he says he doesn't have time this month. FF states that he will come into the pharmacy next month to get his blood pressure measured when he picks up his December medication fills and bring in his blood pressure log from November.
- **Intervention (12/16/19):** Blood Pressure Taking (SNOMED CT: 46973005) – **(Status: Complete)**
- **MRP (1/10/20):** On examination - blood pressure reading raised (SNOMED CT: 163027005) – **(Status: Active/In-Progress)**

Vital Sign(s):

- **Blood Pressure (12/16/19): 128/74 mmHg**
- **Blood Pressure (1/10/20):** 144/90 mmHg

Goals (Free-Text):

1. **Goal Note (10/16/19):** Set a reminder alarm on cell phone to take medications every day – (Status: Complete)
2. **Goal Note (11/11/19):** Monitor BP at least 3 different times/week and record on provided paper. Overall goal is for readings to be <130/<90 mmHg – **(Status: Complete)**
3. **Goal Note (1/10/20):** Over the next week, check blood pressure one time in the morning and one time in the evening. Document blood pressure and provide the updates to the pharmacy – **(Status: Active/In-Progress)**

Patient Encounter Documentation Form

Patient Encounter Documentation Form

Patient Name:	**Medication:**
DOB:	**Rx #:**
Medication Related Problem Date Identified:____________	**Intervention** Date Resolved:____________
☐ Noncompliance with medication regimen	☐ Medication synchronization or synchronization of repeat medication
☐ Deficient knowledge of disease process	☐ Recommendation to monitor physiologic parameters

Blood Pressure Measurement

Date:____________ ____________mmHg

How reported (circle one; internal use):

Pharmacy-Reported Patient-Reported

Goal:

Patient Encounter Documentation Form

Patient Name:	**Medication:**
DOB:	**Rx #:**
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☐ Noncompliance with medication regimen	☐ Medication synchronization or synchronization of repeat medication
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Blood Pressure Measurement

Date:____________ ____________mmHg

How reported (circle one; internal use):

Pharmacy-Reported Patient-Reported

Goal:

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Blood Pressure Measurement

Date:____________ ____________mmHg

How reported (circle one; internal use):

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Blood Pressure Measurement

Date:____________ ____________mmHg

How reported (circle one; internal use):

Pharmacy-Reported Patient-Reported

Goal: