Establishing MTM in Your Pharmacy:
Maximizing Supporting Roles to Maximize Efficiency

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Disclosures

• Aaron is an employee of the Kroger Company and has been involved with/is currently involved with research collaborations and support with the Kroger Company

• David is the current APhA representative to the Pharmacy Technician Certification Board Certification Council

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Objectives

At the completion of this activity, the participant will be able to:

1. Describe key terms and definitions related to medication therapy management (MTM);
2. Discuss clinical and business model components of MTM; and
3. Recognize methods of workflow optimization and staff development strategies for MTM implementation and/or improvement.

Problem to solve

• Pharmacists are interested in MTM, but how can we justify the pharmacist's time?

• Follow-up questions:
  • How do we increase reimbursement for MTM?
  • How do we demonstrate value even when taking a financial loss on MTM services?

Are we asking the right question?

"If I had an hour to solve a problem and my life depended on it, I would use the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than five minutes."

- Albert Einstein

Sturt D, Nordstrom T. Are you asking the right question? Forbes, 2013.

What do we know?

• We are not aware of a magic billing code that allows a pharmacist to generate hundreds of dollars an hour for simply chatting with patients about medications

• We are not aware of anyone that has successfully lobbied a payor to triple reimbursement rates to pharmacists or pharmacies because the pharmacist did not have a large (enough) profit margin for the service

• We are aware of both individuals and national statistics* that demonstrate pharmacists generating a profit for MTM services

*Pharmacists' Patient Care Services Digest (March, 2016). American Pharmacists Association.

Question of profitability isn't new?

- Could we create a profitable dispensing business model based solely on the workflow models of 50 years ago?
- What changed?

- Could a physician create a profitable "clinical services" business model based solely on the workflow models of 50 years ago?
- What changed?

- Parallels to MTM?

Outline for the next 90 minutes

- Brief review of MTM
- Overview of clinical and business model components of MTM

- How do we maximize supporting roles to maximize efficiency in the pharmacy?
  - Workflow design for product and service delivery
  - Team approach to product and service delivery
  - Staff development to better engage and optimize supporting staff

But...

- But sharing roles doesn't help with efficiency when I'm only doing one CMR per month

- But delegating components of a task that I'm not yet doing doesn't make sense

- But I don't have expertise on my staff to delegate any of this

- But I'm not doing MTM at all, or I'm doing a ton of MTM already

Learning Objective 1:

Describe key terms and definitions related to medication therapy management (MTM)

Non-Dispensing Pharmacy Services

- Immunizations

- Health Screenings

- Disease state management (DSM)

- Medication therapy management (MTM)
  - Comprehensive medication review (CMR) vs. targeted medication review (TMR)

McGivney MS, Meyer SM, Duncan-Hewitt W, et al. (2007).

MTM Overview

- Five core elements
  - Medication Therapy Review (MTR)
  - Personal Medication Record (PMR)/Personal Medication List (PML)
  - Medication-related Action Plan (MAP)
  - Intervention and/or referral
  - Documentation and follow-up

Bennett MS, Chater RW, Croley KS, et al. (2008).

Current state of MTM in Ohio

- Statewide:
  - Medicare Part D
  - CareSource
- Regional/local:
  - County/city groups
  - Employer-based groups

Learning Objective 2:
Discuss clinical and business model components of MTM

Workflow/Business Model

Dispensing
- Not all components of dispensing workflow require a pharmacist
- Pharmacy technicians are well-trained to help with the dispensing process, increase efficiency
- Despite declining reimbursement, profitability maintained

MTM
- Not all components of MTM workup/delivery require a pharmacist
- Pharmacy technicians can be trained to help with the MTM process, increase efficiency
- Despite current reimbursement levels, profitability possible

Jenkins A, Eckel SF. Am J Health-Syst Pharm 2012;69:966-71.
Powers MF, Bright DR. J Pharm Technol 2008;24:336-9.

MTM Business Model

- Typically service provision billing average $1-3/minute
- Do we actually bill by the individual minute?
- How long does service provision take?
- Who is providing the service? Components of the service?
- Other costs for the service?
- Do all components of the service need to take place at one time?

Schommer JC, Planas LG, Johnson KA, Doucette WR. J Am Pharm Assoc 2008;48:e46-54.

Top Challenges to Service Provision

Top six barriers as identified by community pharmacists
1. Balancing provision of patient care services with other demands on pharmacists' time
2. Pharmacists have inadequate time
3. Lack of insurance companies paying for these services
4. Billing challenges
5. Payment for pharmacists' patient care services is too low
6. Inadequate support staff

Pharmacists' Patient Care Services Digest (March, 2016). American Pharmacists Association.

MTM Workflow

- Support staff (pharmacy technicians) are critical to an economically viable provision of dispensing services
- Are there components of other non-dispensing workflow that currently involves pharmacy technicians?
- Example: immunizations
  - Form completion
  - Order Entry
  - Insurance billing
  - Inventory management
  - Recordkeeping
  - Marketing

Powers MF, Bright DR. J Pharm Technol 2008;24:336-9.

MTM Workflow: Pre-Encounter

1. Prospective patient identification/selection
   - End of shift? Review of dispensing records? Insurance reports? Upon refill request?

2. Document preparation
   - Billing forms
   - Clinical forms
   - Data collection (refill history, allergies, faxes/mailings to patients or prescribers)
   - Preliminary workup (problem list, suspected disease states, questions to ask, possible med changes – cost/adherence, etc)

Bright DR, Powers MF, Kelling SE, Mihalopoulos C. Ohio Pharmacist. February 2013.

MTM Workflow: Pre-Encounter (cont…)

3. Schedule patients

4. Reminder calls to patients

5. Gather supplies, prepare the encounter space

Bright DR, Powers MF, Kelling SE, Mihalopoulos C. Ohio Pharmacist. February 2013.

MTM Workflow: During the Encounter

6. Patient appointment
   - Welcome the patient
   - Begin to compile a medication list
   - Assess for interventions and ask/answer preliminary workup questions
   - Provide clinical recommendations and education

7. Initial documentation
   - Medication-related action plan
   - Finalize medication list - Personal medication record/list

Bright DR, Powers MF, Kelling SE, Mihalopoulos C. Ohio Pharmacist. February 2013.

MTM Workflow: Post-Encounter

8. Communicate with other health care providers

9. Complete clinical documentation

10. Schedule follow-up appointment/call

11. Additional documentation to patients

12. Clinical/billing data entry

Bright DR, Powers MF, Kelling SE, Mihalopoulos C. Ohio Pharmacist. February 2013.

MTM Workflow: TIPs

- Identify patients with medications waiting
- Include TIP paperwork
- Schedule phone follow-up if necessary
- Complete data entry/billing

Bright DR, Powers MF, Kelling SE, Mihalopoulos C. Ohio Pharmacist. February 2013.

Workflow Design

- How can we divide the work involved in the MTM process?
  - Different people completing different components of the overall case?
  - Dividing the one case into different times during the day/week?

Workplace-Specific Model Development

- In groups of 3-5, sketch out your MTM workflow using the MTM Flow Worksheet

  - Begin thinking about which specific steps could be:
    - Completed only by a pharmacist
    - Completed by a specifically trained pharmacy technician
    - Completed by a pharmacy technician with minimal training

Willis D. Fam Pract Manag. 2005 Apr;12(4):61-66

Learning Objective 3:

Recognize methods of workflow optimization and staff development strategies for MTM implementation and/or improvement.

Moving to a Team Approach in MTM

- To successfully implement MTM we must engage our staff in the process of creating, outlining, and delivering the service.

- How would you describe your ideal pharmacy team?

Staff engagement

- How do we usually motivate?
  - Reward vs punishment

- When does this work?
  - Rule-based routine work
  - Tasks that don't require creativity or innovation

- Limitations
  - Opposite effect on internal motivation

Pink, D. Drive: The Surprising Truth About What Motivates Us. 2011.

Internal motivation

- How do you foster the internal motivation of your staff?

- Drive
  - Purpose – work in the service of some greater objective/cause larger than themselves
  - Autonomy – acting with choice over task, time, technique, and team
  - Mastery – the desire to get better and better at something that matters

Pink, D. Drive: The Surprising Truth About What Motivates Us. 2011.

Purpose

- <u>Mission</u>: What is the core purpose of the organization?
  - Alignment of team mission
  - Creation of individual mission

- Creation:
  - Everyone should participate
  - Why does your organization exist and why should anyone care?

- Mission statements should
  - Be ambiguous and fancy –or– concrete and tangible
  - Have a clear "why"
  - Instill enthusiasm

http://www.fastcompany.com/1404951/how-write-mission-statement-doesnt-suck-video
http://bphc.hrsa.gov/archive/technicalassistance/resourcecenter/general/visionmissioncorevalues.pdf
Covey, SR. The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change. 2004.

Mission Statement Examples

Helping people on their path to better health

To be America's most loved pharmacy-led health, wellbeing and beauty retailer

To improve the lives of our patients and health of our communities by delivering quality care, optimal medication use, and better outcomes

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Pharmacy department specific mission(s?)

- **Person 1:** Clearly demonstrate care and compassion for each individual patient through customized counseling
- **Person 2:** Quickly and accurately dispense prescriptions to maximize throughput and profitability
- **Person 3:** Clear the prescription queue as quickly as possible so that the pharmacy doesn't collapse when a pharmacy technician goes to lunch

- Shared mission vs. competing interests?

Workplace-Specific Mission Statement Development

- In groups of 3-5, describe:
  - What you believe your pharmacy's mission statement to be

  - How others at your pharmacy perceive your organizational mission statement compared to their individual purpose

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Action Plan: Mission Statement

- **If you have a mission statement:**
  - Are you following the mission?
  - Is the team as a whole following the mission?
  - Do you need to revise the mission statement?

- **What's your next step?**
  (Add your insights and ideas to the Action Plan Worksheet)

- **If you don't have a mission statement (yet):**
  - What is important to your pharmacy?
  - What are the baseline expectations of your team members?
  - How will you get input from your other team members?
  - How do you convey importance of a shared mission statement?
  - Do you need a staff meeting to discuss and create a mission statement?

Autonomy

- How do you engage your staff in the process of setting workload responsibilities/expectations?

- Do staff get a voice regarding when to perform different tasks?

- Do staff have the freedom to implement new ideas/systems when performing tasks?

- How do you encourage your staff to team up?

  Pink, D. Drive: The Surprising Truth About What Motivates Us. 2011.

MTM workload responsibilities activity

- Using the Staff Development Worksheet…
  - What are the strengths, weaknesses, and current responsibilities of your staff members?

- Review your MTM Flow Worksheet…
  - Where do you see the best fit for each of your staff members?

- How do you engage staff in the process?
  - Does unilaterally assigning tasks promote autonomy?

- **What's your next step?** (*Add your insights and ideas to the Action Plan Worksheet*)

Mastery

- How can you track mastery?

- How are you evaluating your staff?

- Using Staff Development Worksheet…
  - Based on where you see employees fitting, what areas do you think they need to develop to be able to do that?
  - What are some SMART Goals you would recommend?
  - How can you engage the specific staff member in this process?

- **What's your next step?** (*Add your insights and ideas to the Action Plan Worksheet)*

Pink, D. Drive: The Surprising Truth About What Motivates Us. 2011.

Take home questions

- Do you meet with your staff on a regular basis?
- Do you engage your staff in identifying their beliefs about MTM, roles in the pharmacy, their strengths/weaknesses?
- Do you have a development plan for your staff?

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