



Patient Encounter Documentation Form

Each time you identify a Medication Related Problem (MRP) during the patient's pre-appointment preparation, be sure to document the intervention. Here is a tool you can use in workflow to document the intervention. Review the guide below to see when and how the tool can be used in the pharmacy.

DOCUMENTING THE MRP:

After you have documented the MRP, intervention, and goal on paper, document within your technology partner for the eCare Plan.

Documenting can be performed in a variety of ways:

1. Immediately after this document has been completed
2. During random downtimes by an appointed pharmacy staff member
3. During designated time throughout the day (e.g., slow periods, towards the end of the day)
4. After getting comfortable with documenting care plans, document directly into the care plan platform within the appointment-based model workflow

How-To Guide

MEDICATION RELATED PROBLEM (MRP):

Check the problem that you identify for a patient and put the date that this problem was identified

To the right of each row, common interventions are listed for the MRP

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

Goal:

GOAL: Free text format that is a goal the patient wants to focus on achieving. Could be different for each patient

INTERVENTION:

Select a resolution (AKA intervention) to the MRP that you identified

Put the date the MRP was resolved. This may or may not be the same date as the MRP was identified

You may select one or more of these interventions for the MRP

There may be other interventions that are applicable to the MRP, but were not listed for simplicity purposes

There could be instances that you have an intervention but not necessarily a MRP

For your reference:

Medication Related Problem	SNOMED CT Code
Noncompliance with medication regimen	129834002
Intervention	SNOMED CT Code
Medication synchronization (may be found as synchronization of repeat medication)	415693003

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

Goal:

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

Goal:

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

Goal:

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

Goal:

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

Goal:

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

Goal:

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

Goal:

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

Goal:

CASE INSTRUCTIONS

Patient Case Materials



Step 1: Review the Persona for French Fry

- 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

- 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.
- Please document the sample patient case before moving on to **documenting real patients**. This helps you understand how to document a patient encounter within the care plan system.
- Please document this sample case exactly as it states within your respective technology partner for eCare Plan documentation.
 - Items to document exactly as stated in the sample care plan: Patient Demographics, Allergies, Active Medication List, Medication Related Problems and Interventions, and Goals
 - Item to document that can vary if easier than creating a new prescriber: Prescriber Information
- Medication Related Problems (MRPs) and Interventions Details:
 - SNOMED CT codes allow CPESN USA to receive the data from your technology partner in a standardized way. If you have problems finding the text as described in the next sentence, you may use the SNOMED CT code to search within the MRPs or Interventions section of the technology platform. Text for MRP will be listed as "noncompliance with medication regimen" and the text for intervention will be listed as "medication synchronization" **or** "synchronization of repeat medication."
- Goals Details:
 - 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. Therefore, setting a reminder alarm on cell phone to take medications every day, helps the patient remain synchronized in filling medications and achieving nonadherence.

Step 3: Print and Implement Use of the Patient Encounter Form

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

Step 4: Document 25 Patient Encounters Related to Med Sync Enrollment

- Once you have the sample case completed and submitted to CPESN® USA, proceed with documenting within your appointment-based model workflow.
- The Patient Encounter Documentation form is to help you document your patient encounters on paper initially and then implementing within workflow.

PERSONA #1

French Fry

Identifying issues associated with the patient's drug therapy



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

Patient was diagnosed one year ago with essential hypertension following complaints of headaches that persisted for several days. His blood pressure at the clinic was 195/105. He was started on hydrochlorothiazide (HCTZ) 12.5 mg and eventually lisinopril was added. He is currently taking a lisinopril/HCTZ 20/12.5 combination tablet—2 tablets every day. Amlodipine 5 mg every day and Potassium Chloride 20 mEq—2 tablets every day have been added.

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 Well, MD

FILL HISTORY

HCTZ 12.5—discontinued after 3 months. Due to uncontrolled hypertension—started on combination tablet of lisinopril 20/12.5 every day and was titrated to 2 tablets every morning. One month later added amlodipine 5 mg every day after physician visit due to therapeutic goals not achieved. Blood work at this visit demonstrated that he was hypokalemic—also started potassium chloride 20 mEq—2 tablets every morning.

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:** Not measured
- **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 presents to the pharmacy today to refill his lisinopril/HCTZ 20/12.5 tablets. **Pharmacy management system indicates that he is approximately 15 days late filling this medication. Further review indicates that he fills his amlodipine and potassium chloride tablets on different days and that FF doesn't seem to be consistent with the timing and frequency of refills with these medications as well.**

INTERVENTION(S) AND EDUCATION (RECOMMENDATIONS)

Emphasizing importance of adhering to medications to achieve therapeutic goals. **Recommend Medication Synchronization to get all refills synced up on the same date to reduce patient inconvenience coming to pharmacy multiple times. Also, provide clinical monitoring and patient follow-up utilizing an appointment-based model tied to the synchronization process.**

GOAL

Improved adherence: Set a reminder alarm on cell phone to take medications every day. Overall goal is controlled blood pressure (<120/<80 mmHg).

MONITORING PLAN AND FOLLOW-UP

Sync date selected. Patient will be called 5 days in advance of medication pick-up to address any changes/patient complaints/concerns/medication issues.

Sample Care Plan Case for Documentation

French Fry presents to your pharmacy and wants a refill on lisinopril/hctz 20/12.5 mg. This prescription is 15 days late, so nonadherence appears to be an issue. After reviewing the patient profile and talking with FF, nonadherence is confirmed. FF 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. FF agrees to enroll in your Medication Synchronization program. 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. The pharmacist helps the patient set a reminder alarm on cell phone to take medications every day.

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:** Noncompliance with medication regimen (SNOMED CT: 129834002)
 - **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:** Medication synchronization/synchronization of repeat medication (SNOMED CT: 415693003)
 - **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."

Goals (Free-Text):

1. **Goal Note:** Set a reminder alarm on cell phone to take medications every day