

Guide to Providing Telehealth Comprehensive Medication Reviews

Provided by the Pharmacy Society
of Wisconsin & the Wisconsin
Pharmacy Quality Collaborative



Telehealth Privacy Statements

- Introduce yourself and briefly explain (remind) why you are calling. Speak slowly and clearly.
- Inform the patient how much time you are going to need in order to complete the review.
- Inform the patient that this conversation is a private meeting (either video or telephone) and that their privacy and confidentiality are protected under the HIPAA rule just as they would be during an in-person medication review.
- Confirm the patient gives verbal permission to complete the review. Document this permission in your notes on the CMR/A documentation form that you use.
- Confirm that the patient is in a private area, or if others are present, that they are comfortable with having them present.
- Ask the patient to eliminate as many distractions as possible (i.e., turn the volume of the television down, move to a quieter room). It is also important to eliminate distractions in the pharmacist's environment as well.

Sample Language:

"Hello, my name is [name]. Thank you for taking the time to talk with me today. Our meeting today will take approximately 45-minutes to 1 hour. Before we start, I want to make sure that you understand that this conversation is private and confidential. It is the same as if we were together in person in the pharmacy. Please confirm you give your permission for us to complete this comprehensive medication review? I also want to ask if there are any other people in the room/ house with you? And if so, do you feel comfortable with having them present." If yes, then we can begin.

Further information [here](#).

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."

Further information [here](#).

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.
- 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.

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.”

Further information [here](#).

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].”

Further information [here](#).

Finishing the CMR

Check in with the patient to make sure they are well supported during the COVID-19 pandemic. 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.*
- *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.*