

Medication Adherence Quick Reference Guide

Introduction

ChartMaker® Clinical has been updated with a new Medication Adherence functionality that provides actionable data at the point of care to increase adherence and improve patient outcomes while reducing costs by putting patient-specific adherence summaries and real-time messages from PBM/payers in the provider's workflow. With this actionable intelligence, issues and gaps in care can be identified quickly with medication adherence. Then the caregivers can address those problems during and in-between patient visits, in partnership with PBM/payers and provider vendors.

In Clinical, patient Medication Adherence information is primarily provided via To-Do List messages and in the patient's Facesheet. A Medication Adherence Worklist Summary to-do list message will be sent to a provider's To-Do List daily, and there are further options to enable urgent alert messages for Medication Adherence, High-Risk Medications, and Missing Medications to appear in providers To-Do List. In the patient's Facesheet, a color-coded Medication Adherence button allows a quick visual indication of the patient's medication adherence, while also providing access to a Medication Management dialog that provides a summary of the patient's medication adherence insights, and in turn provides patient-specific access to the provider's Medication Adherence Worklist.

The following sections will provide you with additional information about Medication Adherence in the Facesheet, and via the To-Do List messages, and will walk you through the workflow for responding to Medication Adherence tasks and errors.

The Facesheet

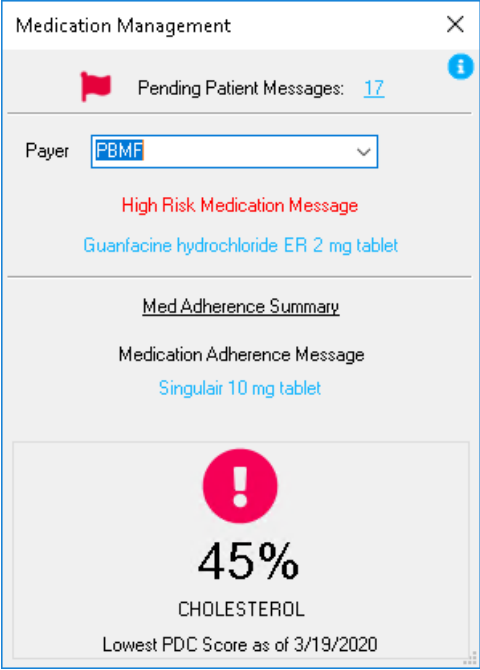
The **Medication Adherence** button at the bottom of the Facesheet is color-coded based on the patient's PDC (Proportion of Days Covered) score. The PDC score allows providers to easily see if a patient is taking their medications and is calculated by PBMs and/or payers based on refill records obtained from prescription claims and shows the percentage of time patients have medications available to take. Currently, the PDC score is available for cholesterol, hypertension, and diabetes. The Medication Adherence button is color-coded based on the lowest PDC score for one of the disease classes. Gray indicates that eligibility was not returned, blue indicates that no PDC data is available, red indicates the PDC score is less than or equal to 60% (low), yellow indicates a PDC score between 61 and 79% (moderate), and green indicates a PDC score of 80% or greater (healthy). See Figure 1.



Figure 1 – Facesheet – Medication Adherence

Clicking the **Medication Adherence** button allows access to the Medication Management dialog that provides a summary of the patient's medication adherence insights. See Figure 2. You can also access the Medication Management dialog for a patient by clicking **Chart > Medication Adherence** when in the patient's chart. Do note, to access the Medication Management dialog by either method, you must have a **Specialty Patient Enrollment/Med Adherence** privilege of **Submitter** or **Viewer**, as well as a **Prescribing** privilege of **Proxy** or **Prescriber**. If you do not have these privileges, the Medication Adherence menu item will be grayed out and not accessible, and if you click the Medication Adherence button, you will receive a message that you do not have sufficient privileges to access this feature.

In the Medication Management dialog, the Pending Patient Messages displays the number of actionable messages in the patient's worklist for high-risk medications, medication adherence, and/or missing medications. By clicking the number link, you access the Medication Adherence worklist for the patient. The Payer field allows you to change the PBM/payer if there are multiple PBMs and payers for the patient. When the payer is changed the information in the will changed based on the patient and PMB/payer specific information. Under the Payer field in red will be the worklist item that is the highest priority based on the payer selected. Next will be displayed a Med Adherence Summary if there are any medication adherence medications. And last will be the lowest PDC score along with the disease class. You can also click the  button in the top-right provides accesses to a help window that provides an explanation for each area of the dialog including a color legend for PDC score.



The image shows a 'Medication Management' dialog box. At the top, it says 'Medication Management' with a close button (X) and an information icon (i). Below this, there's a red flag icon and the text 'Pending Patient Messages: 17'. A 'Payer' dropdown menu is set to 'PBMF'. Below the dropdown, there's a red text label 'High Risk Medication Message' followed by 'Guanfacine hydrochloride ER 2 mg tablet'. A horizontal line separates this from the 'Med Adherence Summary' section, which contains the text 'Medication Adherence Message' followed by 'Singulair 10 mg tablet'. The bottom section features a large red circle with a white exclamation mark, the text '45%', the word 'CHOLESTEROL', and 'Lowest PDC Score as of 3/19/2020'.

Figure 2 – Medication Management

The Medication Adherence Worklist

When there are Pending Patient Messages in the Medication Management dialog, if you click the corresponding number link, you will access the Medication Adherence dialog which will contain all the Worklist items for that specific patient. See Figure 3. When accessing the Medication Adherence dialog, you are connected to Surescripts® interface that allows you to view the Worklist, and Task History, for the patient.

Do note, you can view all the worklist items for a specific provider, as they pertain to all patients, by clicking **Chart > Medication Adherence** when you are not in a specific patient's chart.

There are three types of messages that may appear in worklist: **High-Risk Medication** messages, indicating that the patient is taking a medication that could cause adverse effects or may not suitable based on side effects; **Medication Adherence** messages, indicating the patient may not be taking the medication properly, or as frequently as prescribed; and **Missing Medication** messages, indicating that an expected medication is not prescribed based on patient's diagnosis codes. Any message that is tagged with a red flag is considered urgent and requires immediate attention.

Task	Patient	DOB	Due	Created	Description
High Risk Medication Message	Wayne, Bruce	02/06/1946	04/25/2020 08:00:00 PM	03/27/2020	Guanfacine hydrochloride ER 2 mg tablet
Medication Adherence Message	Wayne, Bruce	02/06/1946	04/25/2020 08:00:00 PM	03/27/2020	singulair 10 mg tablet
Missing Medication Message	Wayne, Bruce	02/06/1946	04/25/2020 08:00:00 PM	03/27/2020	Accu-Chek Aviva Test Strips
Medication Adherence Message	Wayne, Bruce	02/06/1946	05/27/2016 08:00:00 PM	03/27/2020	Focalin XR 10 mg capsule

Figure 3 – Medication Adherence – Worklist

To view a message, simply double-click the item you want to address in the worklist. The message details will appear, along with any questions that allow you to provide feedback regarding the medication issue. See Figure 4. These questions are not required to be answered, however, answering these questions not only provide feedback to Surescripts and the PBMS and payers, but allows for more accurate medication adherence summaries, which in turn will help toward providing better health outcomes for the patient regarding their medication management.



MEDICATION ADHERENCE MESSAGE
SPINA, CHRISTOPHER 07/26/1934

Received: 04/09/2017

Payor ABC records indicate this patient may have discontinued taking Riomet as instructed. Please discuss adherence with your patient.



PLEASE RESPOND:

Is adherence a confirmed issue?

Yes

No



MEDICATION ADHERENCE PROFILE

▲ 52% Diabetes		03/28/2017
Medication	Filled	Supply
Micronase, 5mg NDC: 52125-646-02	03/14/2017	30 days
Riomet, 500mg NDC: 52125-766-19	01/15/2017	90 days

▲ 61% Cholesterol		03/23/2017
Medication	Filled	Supply
niacin, 1000mg NDC: 0093-7394-98	02/20/2017	90 days

▲ 71% Hypertension		03/26/2017
Medication	Filled	Supply
Norvasc, 5mg NDC: 33342-015-10	02/10/2017	90 days
lisinopril, 10mg NDC: 51079-982-20	02/20/2017	100 days

Figure 4 – Medication Adherence – Message Details

When answering a question, there may be additional follow-up questions to provide a more accurate depiction regarding the adherence. See Figure 5 for an example.

PLEASE RESPOND:
 RESPONSE SAVED.

Is adherence a confirmed issue?

No

Why is adherence NOT an issue?

- ☐ Therapy no longer necessary.
- ☐ Patient taking samples.
- ☐ Patient purchases drug with cash/reduced rate program.
- ☐ Patient splitting tablets.
- ☐ Patient has excess supply and has been adherent.
- ☐ Patient states they are taking therapy (data inaccurate).
- ☐ An unlisted reason.

Figure 5 – Medication Adherence – Follow-Up Questions

After the questions are answered, you will return to the original Worklist, and that request item will be removed from the Worklist and moved to the Task History area. Likewise, the Medication Management dialog will be updated to reflect any changes in the worklist, and if there was any related To-Do List message for that medication adherence alert, it will be removed from the To-Do List for the provider. You can either close out of the Medication Adherence dialog or process another message.

To-Do List Messages

The system will send Medication Adherence type messages to the provider's To-Do List. There are two categories of messages: a **Medication Adherence Worklist Summary** and **Alert** messages for Medication Adherence, High-Risk Medications, and Missing Medications. The summary message will appear daily, and the alert messages will appear whenever urgent alert messages that are received. These latter alert messages can be turned on and off, depending upon whether you want to receive these messages in your to-do list, and will default to off. The following provides details on these types of messages.

A **Medication Adherence Worklist Summary** message will be sent to a provider's To-Do List daily and the body will contain a summary of the number of Low, Medium, High, Urgent, and Alerts priority tasks, as well as the Total number of active tasks. See Figure 6. If the summary contains any alert priority tasks, it will be sent as a high-level to-do list message and will be highlighted in red. Likewise, it will contain the number of alerts in the subject heading. If there are no alert priority tasks in the summary, it will appear as with a normal-level to-do list message. When you double-click the message the Medication Adherence Worklist will open allowing you to process the messages as needed.

The screenshot shows a web interface for a 'To-Do List for: JD (JD)'. At the top, there are buttons for 'New', 'Delete', 'View', 'Transfer', 'Print', and 'Refresh', along with a 'Priority' dropdown menu. Below these is a table with columns: 'Date', 'From', 'Priority', 'Subject', 'Type', and 'Patient'. A single message is listed: '05/08/2020 System High Medication Adherence Worklist Summary Medication Adherence'. The message is highlighted in red. Below the table, there is a pagination bar showing '1-1 of 1 items' and a legend 'RRR = Read Receipt Requested'. At the bottom, a text box contains a summary of active tasks: 'Your summary of active Medication Adherence tasks to be worked on are listed below: Low: 0 tasks, Medium: 0 tasks, High: 0 tasks, Urgent: 0 tasks, Alert: 2 tasks, Total: 2 tasks'.

Figure 6 – To-Do List – Medication Adherence Worklist Summary

You can also enable urgent alert messages for Medication Adherence, High-Risk Medications, and Missing Medications appear in your To-Do List when the **Enable Medication Adherence alert To-Do List messages** preference option is selected in the **Prescription** preference tab. When this preference is activated, any urgent alert messages that are received will appear in your to-do list with a subject heading of **Alert: [Message Type]** (i.e., Alert: Medication Adherence Message, Alert: High Risk Medication, Alert: Missing Medication Message), and the body will contain the message task and the patient's name. See Figure 7. When you double-click the message the Medication Adherence Worklist will open allowing you to process the message(s) as needed.

The screenshot shows a web interface for a 'To-Do List for: JD (JD)'. At the top, there are buttons for 'New', 'Delete', 'View', 'Transfer', 'Print', and 'Refresh', along with a 'Priority' dropdown menu. Below these is a table with columns: 'Date', 'From', 'Priority', 'Subject', 'Type', and 'Patient'. A single message is listed: '04/22/2020 System High ALERT: High Risk Medication Message Medication Adherence'. The message is highlighted in red. The table has a scrollable area for the 'Subject' column.

Figure 7 – To-Do List – Medication Adherence Alert Message

ENABLE MEDICATION ADHERENCE ALERTS

Use the following steps to turn on the urgent alert messages for Medication Adherence, High-Risk Medications, and Missing Medications so they appear in your To-Do List.

1. In Clinical, click **Edit > Preferences**.
2. In the Preferences dialog, lick the **Prescription** tab.
3. In the Other Rx Settings section, check the **Enable Medication Adherence alert To-Do List messages** option. See Figure 8. When this option is checked, the system will generate a To-Do List message whenever a Medication Adherence, Missing Medication, and/or High-Risk Medication urgent alert message is received from Surescripts for a patient.
4. Click the **Save** button.
5. When finished, click the **OK** button.

The screenshot shows the 'Preferences' dialog box with the 'Prescription' tab selected. The 'Other Rx Settings' section is expanded, and the 'Enable Medication Adherence alert To-Do List messages' checkbox is highlighted with a red box. The checkbox is currently unchecked. Other settings visible include 'Prescriptions per Page' set to 2, 'Print prescription savings material' checked, 'Do not print savings when patient is registered for the patient portal' checked, 'Rx Format' set to 'scrip.txt', 'Drug Interaction Setting' set to 'Contraindicated and Severe', 'Default Destination' set to 'E-Prescribe', and 'E-Rx user to receive unmatchable refill requests' set to 'JD'.

Section	Setting	Value
Printing	Prescriptions per Page	2
	Print prescription savings material when prescribing from the Facesheet	Checked
Printing	Do not print savings when patient is registered for the patient portal	Checked
	Rx Format	scrip.txt
Drug Interaction Setting	None	Unselected
Drug Interaction Setting	Contraindicated Only	Unselected
Drug Interaction Setting	Contraindicated and Severe	Selected
Drug Interaction Setting	Contraindicated, Severe and Moderate	Unselected
Default Destination	Printer	Unselected
Default Destination	E-Prescribe	Selected
Other Rx Settings	E-Rx user to receive unmatchable refill requests	JD
	Display ePA warning message when eligibility is not returned	Checked
	Enable Medication Adherence alert To-Do List messages	Unchecked

Buttons: Save, OK, Cancel, Apply, Help

Figure 8 – Preferences – Prescription – Other Rx Settings

User Privileges for Medication Adherence

To access the Medication Management dialog, as well as the Medication Adherence Worklist, you must have a **Specialty Patient Enrollment/Med Adherence** privilege of **Submitter** or **Viewer**, as well as a **Prescribing** privilege of **Proxy** or **Prescriber**. Use the following steps to configure these privileges.

In Clinical, click **Edit > System Tables > Users**.

In the Users dialog, double-click the **User** you want to configure the Prescribing and Specialty Patient Enrollment/Med Adherence privilege for.

Click the **Privileges** tab.

Highlight the Prescribing privilege, and then click the **Proxy** or **Prescriber** radio button. See Figure 9.

Next, highlight the **Specialty Patient Enrollment/Med Adherence** privilege, and then click the Submitter or Viewer radio button. See Figure 10.

When finished, click the **OK** button.

The screenshot shows the 'Privileges' dialog box for a user named John D. Doe. The 'Prescribing' privilege is selected in the list. In the 'Level' column, the 'Prescriber' radio button is selected and highlighted with a red box. A descriptive text box for 'Prescriber' is visible below the radio buttons.

Figure 9 – Privileges — Prescribing

The screenshot shows the 'Privileges' dialog box for the same user. The 'Specialty Patient Enrollment/Med Adherence' privilege is selected in the list. In the 'Level' column, the 'Submitter' radio button is selected and highlighted with a red box. A descriptive text box for 'Submitter' is visible below the radio buttons.

Figure 10 – Privileges – SPE/Med Adherence