Comprehensive Medication Review (CMR) Guide

A Comprehensive Medication Review (CMR) is an interactive, person-to-person review and consultation of a patient’s complete medication regimen performed in real-time by a pharmacist. Following the review, you provide a Patient Takeaway to the CMR recipient. The takeaway follows CMS’ required format including cover letter, personal medication list and medication action plan. An optional CMR Worksheet is available in the Connect™ Platform to assist you with gathering all required information from the patient or patient representative. A patient must be targeted for a CMR in order to bill for this service.

1 Select Start CMR from the patient’s profile.

Use patient-friendly language for all fields, as the information listed will appear on the Patient Takeaway. This takeaway serves as a reference for the patient and can be shared with family members, doctors and other care providers.

A patient is targeted for a CMR if the To Do section indicates Needs Comprehensive Medication Review (CMR).

Remember to also complete all TIPS that you discussed during the CMR.

2 Service Delivery tab

Review service expectations. Indicate how the CMR was delivered: face-to-face, phone or telehealth.

You may choose to download the optional CMR worksheet to assist you in gathering all required information.

Face-to-face is preferred to maximize the potential to identify drug therapy problems. If your patient is unable to meet in person, phone may be an option. In some cases, a prior authorization code may be required to complete a CMR by phone (will be indicated on this tab). To obtain a PA code, call OutcomesMTM at 877.237.0050.
3 Health Profile tab

Update Current Conditions. Add and remove conditions to reflect all conditions the patient is currently managing. If a condition is not listed, enter it under Other Conditions.

Update Drug Allergies and Side Effects. If the patient has a known allergy or side effect, enter the medication and the associated reaction. If the patient does not report any allergies or side effects, check the box for “No known allergies.”
**Med List tab**

Update the medication list to reflect all medications (both prescription and non-prescription) that the patient is currently taking. You may also include current immunizations. For each medication, fill out the directions for use, related condition and prescriber’s first and last names in patient-friendly language. If a listed medication has been discontinued, click the trash can on the right to remove it. After discussing a medication, mark it as reviewed. If you prefer, Mark all as Reviewed is available at the top of the Med List to update this field for all medications.

View Prescription History from the left menu for additional detail.

Add missing medications (e.g., patient uses samples or paid cash) and OTC medications. Start typing the name; a dropdown list will appear for you to select the medication and dose.

When adding directions, include dose, dosage form, strength, route of administration and frequency. Connect translates sig codes into patient-friendly language. View the Sig Code Guide for additional information.

For OTC products not prescribed, write “Self” in the prescriber field.

If you noted a problem or actionable item related to current therapy or identified a gap in therapy, select Add Item to Action Plan to add it to the patient’s Medication Action Plan.

> If pharmacist-identified claims are allowed and your intervention is a billable service, start a claim from the Add Item to Action Plan box.

**Action Plan tab**

Arrange problems and actionable items discussed during the CMR in order of importance, with the most important items listed first. Include noted drug therapy problems, suggested changes for the patient’s administration or other action items. Enter one item per line, written in patient-friendly language directed at the patient.

Click the icon on the left of a line to drag and drop it in order.
6 Takeaway tab

Fill in remaining fields. Review all information carefully; if all information is correct, check the box for the attestation. Create, print and deliver the takeaway to the patient, and submit your MTM claim.

The MTM claim must be submitted within 7 days of patient/representative-pharmacist interaction.

If you complete a CMR with a patient representative, you’ll indicate if the patient is cognitively impaired. If yes, document the rationale. For additional information, refer to the Policy and Procedure Guide in Resources.

If documenting from a technician role, select the pharmacist who provided the CMR.

Include your hours (or general pharmacy hours) in case the patient has questions.

If selecting the Spanish template, be sure all information entered in the Health Profile, Med List, Action Plan and Takeaway tabs is in Spanish.

For Additional Notes, you may include other reminders or information for the patient, such as “Auto-refills will start on June 1” or “Follow up with me after your next doctor’s appointment with any changes.”

Each tab will have a checkmark once documentation requirements are met. All tabs must be complete in order to create the takeaway and submit your MTM claim.

Select Save for Later to save all information but not submit your claim. Note that this CMR opportunity will remain available at other MTM Centers unless you schedule the CMR in the To Do section of the patient profile.