MTM DAILY CHECKLIST

**Tip:** Let specific staff members take ownership of specific tasks to increase staff engagement in MTM and spur new efficiencies to maximize your MTM program.

1. **MORNING**
   Take a few minutes to review work already in progress in order to plan follow-up with prescribers or patients, complete documentation for MTM services that were resolved and identify the next MTM opportunities to address.

   - Log into the OutcomesMTM platform to review the Dashboard.
   - Address any Claims to Review & Resubmit
   - Review Patients in Progress
     > Did you receive prescriber responses that you can document?
     > Does the pharmacist need to follow up with a patient today?
     > Is it time for another contact attempt for prescriber or patient?
   - Look for Scheduled CMRs
     > Provide reminder calls to patients with appointments in the next 24-48 hours
   - Look for Checkpoints Available for Adherence Monitoring
     > Is it time to complete a quarterly checkpoint?
     > Review the Adherence Monitoring queue for any patients who may benefit from extra attention
   - Start new MTM Opportunities (Next 5 patients)
     > Contact Needs CMR patients to set a time for them to talk with the pharmacist
     > Add CMR appointments to each Patient Profile in the OutcomesMTM platform
     > Provide reminder calls to patients with appointments in the next 24-48 hours
     > Inform the pharmacist of TIPs to address today (create a list, add reminder notes in patient bags, etc.)
     > Protect PHI. Do not print patient lists or TIPs as they contain sensitive information.

2. **MIDDAY**
   Throughout the day, prepare for upcoming appointments and document claims as MTM services are started or completed.

   - Prepare for upcoming CMRs
     > Update Medication Profiles with directions, prescriber names, etc.
     > Call the patient to verify current medications, including samples, cash pay and over-the-counter products
     > Print CMR worksheet and enter in patient information (store securely if PHI is included)
   - Complete documentation for any pending claims resolved today
   - Pharmacist can deliver CMRs or discuss TIPs with patients
     > Schedule CMRs during overlap, so the pharmacist can step away from the counter

3. **EVENING**
   Wrap up documentation for today’s work and send out any remaining patient or prescriber communications.

   - Document CMRs and any other completed MTM services in the OutcomesMTM platform
   - Print and mail any Patient Takeaways
   - Create and send prescriber recommendations
     > Use the Create Prescriber Fax tool in the OutcomesMTM platform

**Tip:** INDICATES A TASK THAT MAY BE COMPLETED BY A TECHNICIAN

For more information, go to outcomesmtm.com or call 877.237.0050.
MTM WORKFLOW ASSIGNMENTS

**Tip:** Let staff members take ownership of specific tasks to increase staff engagement in MTM and find new efficiencies to maximize your MTM program.

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**CLERK/TECHNICIAN 1**

**Focus:** Scheduling CMRs and alerting pharmacist to opportunities

**Daily Tasks**
- Monitors OutcomesMTM dashboard for new MTM opportunities
- Provides list of CMRs scheduled today to pharmacist
- Creates reminder call list for tomorrow’s CMRs
- Begins reminder calls to patients
- Prepares new MTM opportunities for pharmacist
  - Schedules new CMRs
  - Alert staff to the patients with a TIP for the pharmacist to address

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**TECHNICIAN 2**

**Focus:** Documentation

**Daily Tasks**
- Monitors OutcomesMTM Dashboard for Review & Resubmit claims, Patients in Progress and Scheduled CMRs
- In-progress work
  - Follows up on prescriber recommendations
  - Follows up with patients
- Pre-work for Scheduled CMRs
  - Updates Medication Profiles
  - Prints CMR worksheets
- MTM service documentation based on RPh notes
  - Print & mail Patient Takeaways
  - Start claims for services awaiting patient or prescriber response
  - Document claims for completed services
  - Create and send prescriber communications

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**PHARMACIST**

**Focus:** Completing MTM services

**Daily Tasks**
- CMR pre-work
  - Reviews TIPs and medication list for potential drug therapy problems
  - Fills out CMR worksheet and creates discussion points for the CMR
- Completes CMRs
  - Passes notes to technician for documentation and follow up
- Acts on TIPS
  - Reviews TIP to determine what action is required
  - Talks with the patient and/or recommends a change to the prescriber, if needed
  - Passes notes to technician for documentation
- Reviews claims documented by the technician for accuracy

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