

Documenting a CMR

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

1 Select the CMR & Action Plan tab 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, prescribers and other care providers.



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

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

2 First, update the Medication Profile

The Medication Profile should provide a current list of all prescription and nonprescription medications for the patient along with current conditions and known allergies. Remember, all items listed in the profile will print on the Patient Takeaway.



Access the Medication Profile from the either the Medication Profile tab or the link under #1.

Date Added	Description of the Problem	What the Patient Should Do
No known problems identified		

2 Medication Profile (continued)

a Update Current Conditions.

Add/subtract conditions to include all conditions the patient is currently treating. If a condition is not listed, enter it under Other Conditions.

b Update Drug Allergies & Side Effects.

If the patient has a known allergy or side effect, enter the medication and the associated reaction. If the patient has no known allergies or side effects, you do not need to enter anything.

c Update Current Medications.

For each medication, fill out the prescriber's first and last names, directions for use and related condition in patient-friendly language. If a listed medication has been discontinued, click the x on the right to remove it. The completed list should only include medications (both prescription and non-prescription) that the patient is currently taking. You may also include current immunizations.



Add missing medications (Ex. patient uses samples or paid cash) and OTC medications. For OTC products, write OTC in the prescriber field. Start typing the name, and a drop-down list will appear. Select the right medication and dose.

If you noted a problem related to current therapy or identified a gap in therapy, select Add Problem 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 pending claim from the Add a Problem box.

Connect translates SIG codes into patient-friendly language. View SIG Code Guidance for additional information.

3 Return to the CMR & Action Plan tab to complete points 2-8.

- 2 Update the Medication Action Plan below by recording the problems identified during the CMR.

Date Added	Description of the Problem	What the Patient Should Do
No known problems identified		

Add a Problem to the Action Plan

- 2 Include noted drug therapy problems, suggested changes for the patient's administration or other action items.
One item per line, written in patient-friendly language

- 3 Date the CMR was completed (steps 1 and 2): 05/08/2014

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

- 4 Who was the CMR delivered to?

Patient

- 4 Usually, a CMR is completed with the patient. However, in some cases, you may perform a CMR with someone on the patient's behalf, such as a family member or caregiver.

- 5 Will the Patient Takeaway be sent to the patient or someone else? ☒ Patient ☐ Someone else

Verify the patient's address. This address will appear on the Patient Takeaway.

1111 Oak Ln
Address Line 2
Minneapolis MN 55555

- 5 Verify the address of the CMR recipient (the person listed under #4), who will also receive the Patient Takeaway.

- 6 Pharmacist's availability for questions:

8am - 8pm m-f

- 6 Include your hours (or general pharmacy hours) in case the patient has questions regarding the CMR.

Which pharmacist provided the service?

John Doe

If documented under a technician role, select the pharmacist who provided the MTM service.

- 7 Print and deliver the Patient Takeaway in person or via mail.

☒ I attest that I have reviewed and updated the patient's conditions, allergies, medications and Medication Action Plan.

Add additional notes for the Patient Takeaway (optional):

Date of Patient Takeaway delivery: 05/08/2014

Create Patient Takeaway

- 7 Confirm that all information you provided is correct.

Include any other notes, such as "Auto-refills will start on June 1" or "Follow up with me after your next doctor's appoint with any changes."

Verify the Patient Takeaway has been printed and delivered (patient/representative must receive the takeaway within 14 days of the interaction).

- 8 Submit a CMR claim so you can get paid for your work!

☐ CMR was a medication reconciliation post hospital discharge

Was the CMR delivered face-to-face with the patient or by phone?

☒ Face-to-face ☐ Phone — requires Prior Authorization Code:

Submit CMR Claim

- 8 Face-to-face is preferred to maximize the potential to identify drug therapy problems. If your patient is unable to meet in person, you may request a prior authorization code to complete the CMR via phone.