

Notice from the Executive Officer: MedsCheck Program Enhancements

Standardization

The MedsCheck Program supports the *Patients First: Action Plan for Health Care* (“*Patients First*”) - Ontario’s plan for changing and improving Ontario’s health system.

Patients First exemplifies the Ontario government’s commitment to put people and patients at the center of the medication therapy review process.

The Ontario Government fundamentally believes that pharmacists, as part of an integrated health team, have a critical role to play in putting people and patients first and in providing an enhanced level of care and high quality service delivery for patients.

Building on the experiences and success of the MedsCheck program since it was launched in April 2007 and program standards and system requirements were implemented in January 2012, the ministry’s advisory group, the Pharmacy Council, was asked to develop recommendations that would further strengthen the value of the program towards a *Patients First* health care system.

One of the key recommendations that we heard from the Pharmacy Council, was:

- to better engage patients to reinforce the public’s awareness of MedsCheck;
- to implement more robust standardization with the mandatory use of the ministry developed standard forms and templates; and
- to share the results of the completed MedsCheck Record with the patient’s primary care provider.

Effective, October 1, 2016, pharmacists are required to use the fillable ministry forms and templates or an adapted version developed by their pharmacy software vendor that accommodates what the ministry requires, based on the template examples. What is developed on the pharmacy system software must match the ministry forms and templates exactly unless otherwise specified below.

Please refer to the updated [Professional Pharmacy Services Guidebook](#) for more information.

Enhanced Tools and Procedures for Pharmacists, Patients and Prescribers

1. MedsCheck Brochure

An on-line MedsCheck patient brochure is now available for patients, health care professionals and especially for pharmacists to download and be available for the people of Ontario. The brochure outlines the MedsCheck services and includes self-reflective questions for the patient to consider if the MedsCheck is for them.

The brochure serves as a tool for pharmacists to foster patient awareness of MedsCheck and help patients better understand the annual process of ‘acknowledging professional pharmacy services’.

2. Acknowledgement of Services

The ministry is introducing an annual process for patient acknowledgement of professional pharmacy services. This is facilitated with the use of a mandatory form and when completed by the patient confirms the patient’s understanding of MedsCheck.

This form: **Patient Acknowledgment of Professional Pharmacy Service**

- must be completed annually and provided to the patient; a completed copy is maintained at the pharmacy;
- aims to build patient awareness and understanding of professional pharmacy services;
- replaces the patient’s signature on the MedsCheck Personal Medication Record; and
- may be reproduced / generated by pharmacy software vendors to exactly match the ministry form.

Pharmacists will:

Ensure your patient has signed and dated the annual **Patient Acknowledgment of Professional Pharmacy Service** standardized form to confirm their agreement and understanding of the MedsCheck services. This must be done **before** the pharmacist conducts the MedsCheck service and before the pharmacist bills the Ministry for the MedsCheck service through the Health Network System.

Residents of long-term care (LTC) Homes are exempt from signing the **Patient Acknowledgment of Professional Pharmacy Service form**.

3. Ensure Patient Privacy

Pharmacists must ensure they meet with patients for a MedsCheck in an “acoustically

private” area of the pharmacy away from other customers – preferably where there is a desk and computer.

A MedsCheck is not conducted at drive-thru windows, over the telephone or through video-conferencing.

Patients should be comfortable during the MedsCheck and receive the pharmacist’s undivided attention. All Ontario pharmacies are required to have private space for counselling. If a counselling room is available at the pharmacy and the patient agrees, this can be used.

4. Review Medications and Make Professional Notes

Review all medications (including over-the-counter medications and natural products, vitamins, etc.) with the patient to ensure they are being taken properly. In so doing, pharmacists must **use a pharmacist’s worksheet for professional notes**; they must identify and try to resolve any drug therapy problems or issues the patient may be having in managing their medication regimen and they must ensure all documentation is readily accessible.

This form: **Pharmacists Worksheet**

- Must be completed for every MedsCheck; pharmacists must have professional notes and/or a worksheet when conducting a MedsCheck.
- Notes may be shared with the patient and/or primary prescriber on request.
- Using a worksheet is a mandatory process; the ministry provides a template and pharmacists may use it as the minimum standard.
- Pharmacy software vendors may adapt the form / fields. This means the fields may be expanded and the arrangement of fields can be modified. As a minimum, the worksheet must include all the fields that are included in the ministry form.

5. Prepare a MedsCheck Personal Medication Record

Prepare an accurate medication record (including any over-the-counter medications or natural products that the patient may be taking) to accompany your recommendations and professional notes.

Patients are not required to sign the completed record; however, the pharmacist must sign and date the record indicating the date of the consultation; provide a copy to the patient once all drug therapy problems have been resolved or have a plan for resolution; and keep a copy for the pharmacy records.

Pharmacists must encourage the patient to bring the record with them when returning to the pharmacy, visiting another healthcare provider, or visiting the hospital for health reasons.

This form: **MedsCheck Personal Medication Record**

- is mandatory for all MedsChecks (except the MedsCheck LTC) and must look exactly like the ministry example;
- may be generated / developed by pharmacy software vendors to exactly match the ministry form; and
- must be shared with the patient's primary prescriber using the standardized fax form. A record of the successfully transmitted fax must be kept on file at the pharmacy.

6. Follow-up with Patient

Pharmacists may provide patients with a **MedsCheck Patient Take-Home Summary** that is intended to further engage patients in identifying ways to build added awareness in their drug therapy and help to identify therapy-related goals.

If necessary, pharmacists will indicate to the patient that you will be following up with them by telephone or other alternate method, and that you are available should they have questions.

If used, the form is provided to the patient and a copy kept for the pharmacy records.

This form: **MedsCheck Patient Take-Home Summary**

- is optional;
- is intended to further engage your patient and promote wellness;
- if used, it must look exactly like the ministry form;
- may be generated / developed by pharmacy software vendors to exactly match the ministry form; and
- must be signed and dated by both the pharmacist and the patient.

7. Sharing the MedsCheck with the primary prescriber

Using the standardized fax template, pharmacists must share the completed MedsCheck Personal Medication Record with the patient's primary prescriber. A record of the successfully transmitted fax must be kept on file at the pharmacy.

Please note: Pharmacists are not required to use the standardized fax template for MedsCheck LTC services.

This form: Healthcare Provider Notification of MedsCheck

- is mandatory and must look exactly like the ministry example;
- must be provided when conducting any MedsCheck service (except for the

MedsCheck LTC);

- may be generated / developed by pharmacy software vendors to exactly match the ministry form; and
- must be signed and dated by the pharmacist.

8. Specific to the MedsCheck for Diabetes

The MedsCheck for Diabetes includes an Annual review that involves using the pharmacist's worksheet and providing the patient with a MedsCheck Personal Medication Record; as well as using a Diabetes Education Checklist and providing the patient with a Diabetes Education Patient Take-Home Summary.

The MedsCheck for Diabetes Follow-up program (that formerly required a medication review) has been replaced by Diabetes Education only. Should a person that received a MedsCheck for Diabetes Annual require another medication review during the year, he/she may be considered for program eligibility under the MedsCheck Follow-up program that requires a minimum of three prescription medications for chronic conditions among other specific eligibility criteria for the MedsCheck Follow-up.

In summary, pharmacists are required to complete a **MedsCheck for Diabetes Education Checklist** and provide the patient with a **Diabetes Education Patient Take-Home Summary** for every MedsCheck Diabetes Annual and every Diabetes Education Follow-up review. All documentation must be kept on file and be readily accessible at the pharmacy.

This form: **Diabetes Education Checklist**

- is a template example that provides for the minimum standards when conducting a MedsCheck for Diabetes Annual + Diabetes Education services;
- is mandatory; the checklist must be used for the MedsCheck Diabetes annual or when Diabetes Education Follow-up sessions are arranged;
- pharmacy software vendors may adapt the form / fields. This means that the fields may be expanded and the arrangement of fields can be modified. As a minimum, the diabetes checklist must include all the fields that are included in the ministry form; and
- must be signed and dated by the pharmacist.

This form: **Diabetes Education Patient Take-Home Summary**

- is mandatory and must look exactly like the ministry example;
- must be provided to the patient when conducting a MedsCheck for Diabetes Annual and/or Diabetes Education;
- may be adapted by pharmacy software vendors to exactly match the ministry

- form; and
- must be signed and dated by both the pharmacist and the patient.

Please note: Pharmacists Education for MedsCheck for Diabetes program

Pharmacists providing the MedsCheck for Diabetes Annual and Diabetes Education services are required to have adequate knowledge of diabetes education such as a recent professional program by a Canadian Council On Continuing Education In Pharmacy (CCCEP) approved accredited provider or a current Certified Diabetes Educator designation.

9. Claim for Payment

For audit purposes, claims must be submitted on the day of the MedsCheck service; a copy of the signed MedsCheck Personal Medication Record, the pharmacist worksheet, evidence that the MedsCheck record was faxed to the prescriber, diabetes education check-lists, a copy of the Diabetes Education Patient Take-Home Summary, the annual acknowledgement of services documentation and any other related records are kept on file at the pharmacy in a readily retrievable format.

Pharmacists may submit a claim for payment after completing the MedsCheck and providing the patient with their signed and dated medication record including any recommendations if applicable.

Copies of all forms and other forms of documentation must be kept on file and be readily accessible at the pharmacy.

MedsCheck FORMS and TEMPLATES

The MedsCheck Brochure and the MedsCheck forms and templates will be available on the [ministry website](#).

Each ministry form is numbered; they are compliant with the *Accessibility for Ontarians with Disability Act* (AODA) and available in French.

The forms must include the Ministry Trillium, and MedsCheck logo on the header as well, the Ontario Pharmacists Association (OPA) logo and a place for an individual pharmacy logo (if there is one) is on the footer.

What the pharmacy system creates must match the ministry patient-facing forms exactly, unless otherwise specified (see below).

MedsCheck Forms:

- 1) **Form # 4975-47E: MedsCheck Patient Acknowledgement of Professional Pharmacy Services:** the use of this form is **mandatory** in its design and look. Pharmacies may use the ministry form. If pharmacies choose to adapt the form, it must look exactly like the ministry form.
- 2) **Form # 4967-47E: Pharmacists Worksheet** – the use of a worksheet for professional notes is **mandatory**. Pharmacies may use the ministry template. Pharmacy software systems that have this capability must include the ministry template examples as a minimum standard.
- 3) **Form # 4968E: MedsCheck Personal Medication Record** – the use of this form is **mandatory** in its design and look. Pharmacies may use the ministry form. If pharmacies choose to adapt the form, it must look exactly like the ministry form.
- 4) **Form # 4974-47E: MedsCheck Patient Take-Home Summary:** the use of this form is preferred but not mandatory at this time for patients. Pharmacies may use the ministry form. If pharmacies choose to adapt the form, it must look exactly like the ministry form.
- 5) **Form # 4976-47E: Healthcare Provider Notification of MedsCheck Services:** the use of this form is **mandatory** in its design and look. Pharmacies may use the ministry form. If pharmacies choose to adapt the form, it must look exactly like the ministry form.
- 6) **Form # 4969-47E: Diabetes Education Checklist:** the use of a diabetes checklist is **mandatory**. Pharmacies may use the ministry template. Pharmacy software systems that have this capability or that are incorporating a diabetes checklist to their pharmacy systems must include the ministry template examples as a minimum standard.
- 7) **Form # 4970-47E: Diabetes Education Patient Take-Home Summary:** the use of this form is **mandatory** in its design and look. Pharmacies may use the ministry form. If pharmacies choose to adapt the form, it must look exactly like the ministry form.