Example MTM Daily Task Sheet

Identify MTM Patients
☐ Identify patients with abandoned Rxs (potential non-adherent patients)
☐ Target MTM patients (patient must meet all criteria listed below):
  o Patient is 18 years or older
  o Rx was written by a partnering FQHC provider
  o Patient fits at least one of the following criteria:
    ▪ Taking Coumadin (warfarin)
    ▪ Diabetic
    ▪ Taking 3 or more antihypertensives
    ▪ Taking 5 or more chronic medications
    ▪ Has 3 or more chronic conditions

Contact the Patient
☐ Call patient
☐ Document contact attempts

Prepare for the CMR
☐ Print the preliminary PMR
☐ Review PMR for potential recommendations
☐ Document counseling points on PMR for discussion

Provide the CMR
☐ Update PMR
☐ Provide recommendations and education to patient
☐ Document MAP (for patient)

Conclude the Visit
☐ If necessary, call the prescriber for urgent issues
☐ Give the patient a copy of the PMR and MAP
☐ Fax a copy of the patient’s PMR and MAP (along with fax cover sheet)
  o NOTE: wait until the end of the day to fax/email all provider updates at the same time
☐ Document data electronically in database

Follow up
☐ Follow up with patient and/or prescriber as necessary
☐ Document follow attempts and/or results

Updated 10/08/12