Physician Referral for Pharmacist MTM Services
Toolkit of Forms and Documents from Project

Project Background/Overview

With physician input about patient needs, medication management services were identified and referral materials and procedures were developed for physicians to refer patients to pharmacists for those services. The services essentially aligned with MTM services that have been offered in pharmacy practices. Physician referral had a positive impact on patient follow-through to visit the pharmacist for the services and patients had favorable reactions to the pharmacists and the services.

Toolkit Contents

This toolkit includes several forms used by physicians and pharmacists that can be adapted for use in other clinics and pharmacies for referrals to pharmacists for existing or developed services that pharmacists can provide. The "anonymous" forms that are included in this toolkit are described below. Highlighted parts of the forms show areas for editing to individualize the forms for specific pharmacies or practices.

1. **Pharmacist Referral Form (3 forms)**
   Referral form for physician to FAX to pharmacist identifying service(s) that the pharmacist should provide for the patient. The form allows for multiple medication management issues to be addressed in the patient/pharmacist consultation or visit. The referring physician can also give a copy of the form to the patient as a reminder of the referral and intention for the patient to see the pharmacist for the service(s). This form can be tailored to individual physicians or clinics and for different services to be provided for the patient in one session or a series of sessions or visits to the pharmacist in the following ways:
   a. Referral form with service checklist – The physician can check the service(s) to be provided by the pharmacist to the patient. The services are defined/described using professional language since it is the communication to the pharmacist.
   b. Referral form with service priority ranked - The physician can rank order the services to prioritize what is to be provided by the pharmacist to the patient.   The services are defined/described using patient friendly language.
   c. Example of referral form generated in Electronic Medical Record System - Physicians using EMR/EHR systems for referring to pharmacists generally will employ "outside provider order" referral components in the system to generate the referral form. This is an example of the referral form created by the electronic medical/health record system that was printed out and FAXed to the pharmacist by the physician's staff when the physician made a referral to the pharmacist.   The referral requires text phrases or documents that include pharmacy/pharmacist information and service information that can be cut and pasted into the system. Such information also is needed or inserted into the patient visit summary for patients. The text phrases and information to be cut and pasted can be developed in professional or patient-level language, or both.

2. **Patient Referral**

Patient handout describing pharmacist services for physicians to give to patients when making a referral to the pharmacist. The handout describes the pharmacist services in patient friendly language. It also provides pharmacy contact information and recommendations for preparing for the pharmacist visit. Physicians can use the handout to help patients understand what the pharmacist will focus on and what area of their medication management will be addressed in the pharmacist visit. The handout also can serve as a reminder of the physician referral and intention for the patient to see the pharmacist for the service(s).

3. **Patient Appointment/Scheduling Log**

Upon receipt of a patient referral from the physician, pharmacists can use or adapt this form to keep track of attempts to schedule a patient visit to provide the medication management service(s). If a pharmacist does not have a method or system of scheduling/making appointments with patients for providing services, this form can help identify aspects for scheduling that will be useful. For our referral project, this form helped us gather data on responsiveness of patients to scheduling appointments when the pharmacist did not have a set method or system for keeping track of this information.

4. **Medication Therapy Management - Service Provision Summary**

MTM report form for documenting the medication management service(s) provided by the pharmacist. The form is intended to be completed by the pharmacist, sent to the physician (for notification and recommendations), and returned by the physician to the pharmacist (with a copy retained) to confirm physician receipt/acknowledgment and/or take action on recommendations made by the pharmacist. This report is the 'completed' documentation that was returned by the physician to the pharmacist as confirmation and for pharmacist record-keeping; this version completed the refer/service/report/confirmation communication loop between the physician and the pharmacist for the patient referral and service.

   a. MTM documentation and report form developed by the project if a pharmacist does not already have one available for use.
   b. Example of an MTM documentation and report to the physician already used by a pharmacist. Notations on the form highlight aspects of the documentation and report that the physician found especially useful.