Medication synchronization
An Implementation Guide for Canadian Pharmacists

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This medication synchronization implementation guide was made available by Pfizer Canada Inc.
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Introduction

The state of pharmacy practice has changed irreversibly over the last several years. Changes to the reimbursement model have required pharmacists and pharmacies to adapt their practice to meet the new and growing needs of their patients. The expansion of the pharmacy scope of practice has facilitated this adaptation allowing pharmacists to provide additional services. However, as the scope of practice continues to evolve, with increased responsibilities and abilities, pharmacy teams must rely on a strong dispensary backbone to support the provision of these additional services.

The current pharmacy workflow is reactive and dictated by the patients’ schedule. The resultant inconsistent refilling of medications can lead to both patient and pharmacy team member frustration when trying to accommodate last minute needs and changes. The reactive workflow can easily become disorganized resulting in increased wait times and reduce efficiency.¹

Medication synchronization offers one solution to streamline care and shift to a more proactive workflow.¹² Synchronization creates efficiencies in the dispensary workflow providing value to all stakeholders – patients, pharmacies, physicians and payers (government and third party insurers).¹²⁴

Same day medication refilling improves workflow efficiency⁴, freeing up the pharmacy team to provide additional services and undertake other initiatives. Medication therapies are optimized and patients are provided with the highest level of care.¹ Furthermore, medication synchronization allows pharmacies to become part of the solution to one of the greatest healthcare challenges – patient medication non-adherence.²³ When pharmacies are active participants in the circle of care, there is a greater opportunity to improve patient care.

This manual has been designed by pharmacists – for pharmacists, to serve as a guide to implement a successful and sustainable medication synchronization program in a community pharmacy. Through detailed examples, the guide will provide a reference for pharmacists as they encounter different patient situations. By discussing the current state of dispensing, the content highlights how implementing medication synchronization can benefit all the various stakeholders.
Background

Where are we now?

Patient medication profiles are far too commonly scattered and disorganized. Medications are filled on different dispensing dates, for different durations of supply, and with a different number of refills.\(^1\)\(^2\) All of these factors lead to unsynchronized medication profiles creating burdens for all various stakeholders involved:

**Patients:**

- More trips and phone calls to the pharmacy
- Longer wait times
- Reduced adherence resulting in sub-optimal treatment
- Multiple delivery charges

**Pharmacy:**

- More prescription deliveries and pick-ups
- Increased patient phone and pharmacy traffic
- Longer phone calls with patients unsure of which medications they need
- Reactive workflow
- Uncontrolled inventory (balance owings, overstock)
- Reduced space in pick-up areas due to multiple prescription bags
- Higher costs of supplies (bags, paperwork)
- More individual therapeutic checks

**Physician:**

- More individual refill requests
- Increased time accessing charts
- More time contacting the pharmacy

**Payer:**

- Increased costs as a result of poor adherence
- Government and third part insurance

The Problem: A Reactive Dispensing Workflow

Current pharmacy dispensing models are, all too often, reactive. Pharmacies wait for patients, if and when they remember, to request refills before medications are filled. The result is pharmacy team members spending a significant amount of time and effort either chasing down refill requests from prescribers;\(^1\) or with the expanded scope, processing and documenting pharmacist prescription renewals. Frequently, after refills are processed and filled, patients may still forget to pick-up their medications.
THE SOLUTION:

Medication synchronization

Medication synchronization is the synchronized, same day, filling and refilling of all chronic disease medications.

Implementing medication synchronization aligns prescription refills and quantities so that eventually, all of a patient’s chronic medications are refilled together on the same day. The chosen date becomes the patient’s pick-up date. This date is what drives the system. A week before that a patient’s medications are due, a pharmacy team member calls the patient to determine if any changes have been made to the patient’s regimen such as new or changed medications or hospitalizations. Subsequently, based on the discussion, the pharmacy team member fills all of the medications as appropriate. In order to achieve synchronization, some prescriptions will have to be filled for smaller quantities for the first 1-3 months.

Synchronizations allows the pharmacist to check all medications at one time allowing for a more thorough and effective therapeutic check. Refills and/or therapeutic recommendations are sent to the physician and any issues are resolved before the patient picks up the medications. The result is a proactive workflow which reduces the patient’s need to call the pharmacy or wait for extended periods of time while team members resolve last minute issues.¹

Medication synchronization can improve both patient satisfaction and pharmacy operations.² By helping to improve patient adherence and pharmacy efficiency, the pharmacy team is able to provide a higher level of care. The proactive approach allows patients to feel individually cared for, increasing their confidence in the pharmacy and in optimizing their health.¹²⁵

The Benefits: Why should your pharmacy implement medication synchronization?

- At a time when the pharmacy business model is evolving, medication synchronization is a way to increase operational efficiencies²⁴.
- More thorough therapeutic checks – ensures medication appropriateness to improve patient safety and care¹,
- Improved patient/pharmacy/physician relationships⁵
- More frequent and meaningful patient contact – predictable pick-ups allow for organized and prepared patient appointments to facilitate services such as medication reviews and immunizations²⁴,
- Patient satisfaction – patients who feel individually cared for will be life-long clients who may be more proactive in their own health⁴,
- Reduced prescription paperwork – proactive refilling ensures the patient is never without medications and minimizes the need for, depending on the jurisdiction, time-consuming pharmacist reauthorization¹.
Program Implementation: Getting Started

Your Pharmacy Team

In order for medication synchronization to be successful, the whole pharmacy must buy in to and support the program. All team members should understand the benefits to all stakeholders and how the program will help their patients achieve their goals.

Before getting started, one team member, preferably a technician, should be delegated as the "Program Leader". This individual must have excellent organization and communication skills as their role will be to ensure all medication synchronization tasks, such as phone calls, stock ordering and refill requests, are completed daily.

Each member of the pharmacy team must understand their individual roles as well as the overall logistics of the program to facilitate efficiency and success. Instruction should be given to the team on how to best discuss the medication synchronization program with patients.

Your Patients

Patient buy in is essential for the program’s success. Patients should understand why enrolling in medication synchronization is one of the best ways for them to take control of their health and reach their goals.\(^1\)

When speaking with patients, one strategy is to avoid referring to medication synchronization as a ‘program’ because some patients may be reluctant to enroll in the pharmacy program. Another strategy is to avoid framing medication synchronization as ‘automatic refilling’. Doing so may cause patients to be concerned that the pharmacy is over-filling prescriptions, or taking advantage of their drug coverage.

Start by asking patients, "How would you like to receive all of your prescription refills at the same time?" This question will most likely illicit a positive response from the patient, which can lead to a discussion of how the pharmacy can help by syncing medications and the benefits of same day refills.

Follow the discussion with, “Can we get you started today?” Once patients show interest and agree, sign them up right away. Delaying sign-up to the next month may result in the loss of interest.

Discuss with patients what to expect over the next few months. Patients may get less than their normal supply of certain medications in an effort to sync their file. However, once everything is synced, they will go back to receiving the full quantity of each medication. If a patient is concerned about paying a dispensing fee twice during this period, pharmacies may use their discretion to absorb this one time knowing costs will be recuperated throughout the year as patients will be getting refills more regularly, with no missed refills.

Patients should also expect phone calls from their pharmacy before their refills are due. They can anticipate that all of their medications will be waiting for them the week that they are due unless there has been some change. Patients should be encouraged to inform the pharmacy of any changes as soon as they happen to allow the pharmacy to take them into account before refills are due. It is essential to highlight to patients the importance of this continued communication.
Physicians and Healthcare Providers

It is important to ensure all members of the patient’s care team understand the medication synchronization service that you are providing and how it is going to benefit both the healthcare providers and the patient. When enrolling a patient, consider contacting the primary prescribers by phone or fax to highlight the key point of the program and how it may positively impact their practice. Annex 4 provides an example of a sample fax letter.

Discuss the benefits to the healthcare provider such as fewer individual refill requests resulting in reduced paperwork, pharmacy contact and time accessing charts. Healthcare providers can also expect more timely refill requests helping to ensure continuity of care for their patients.

When informing physicians that patients have enrolled in the medication synchronization program, consider also sending the patient’s medication reconciliation. This will ensure physicians are aware of any medications the patient is taking that may have been prescribed elsewhere. Sending this documentation also provides the opportunity to identify any drug related problems and obtain any additional refills to facilitate the synchronization process.
Resources

Before enrolling patients ensure that the pharmacy has all the required documentation and guiding resources available. This will help to create a smooth transition to medication synchronization. The following are examples of recommended resources and documentation forms. Not all are resources required for program implementation and it is recommended pharmacists adjust these resources to best fit their needs, particularly if electronic capabilities are in place.

- A binder – include dividers and plastic sleeves to help organize patient documentation
- Patient “Call Back” File – helps to track patients who you were unable to reach the 1st time
- Physician contact file – helps to organize refill requests and other medication interventions while the pharmacy waits for physician responses
- Quick Guide: Master Checklist – keep as a reference in the pharmacy to help guide the team (Annex 1)
- Medication synchronization medication refill history and documentation – helps the pharmacy identify changes (Annex 2)
- Patient Consent Example (Annex 3)
- Prescriber Letter Example (Annex 4)

Identifying Patients

Start by focusing on patients who are currently on 3-5 chronic medications. These patients are easiest to sync and gaining experience and comfort with these individuals will help when moving to synchronize those on eight or more chronic medications. When screening profiles, focus in on those who fill their various medications on different dates or those who are consistently late or early for refills. Start slow with a couple of patients per day and gradually increase the number and complexity as the pharmacy team begins to master the process.

Enrolling Patients

Before beginning to sync patient medications, it is important to ensure patient files are up to date. To do so, it can be helpful to complete medication reconciliation or a medication review. If patients are using more than one pharmacy, medications should all be transferred to your pharmacy in order to allow for a complete synchronization. Because patients will initially require more frequent dispensing, increased “frequency of dispensing” forms must be completed depending on the legislation and the patient’s insurance.

Upon enrolling patients in the medication synchronization program, it is imperative to make a note or have a type of flagging system in the patients file. This will ensure that new medications are synced appropriately and existing medications remain synced.
Tips for Enrolling

1. Use the Master Checklist (Annex 1).
2. Keep a binder with a sleeve for each patient enrolled in the medication synchronization program that includes all required and helpful documentation. Documentation may include:
   a. Patient consent forms (Annex 3)
   b. Medication lists / medication reconciliation documentation (Annex 2, scan these into the pharmacy program if you are able to facilitate accessibility)
   c. Prescriber Letter (Annex 4)
   d. Increased frequency of dispensing form (if required as per legislation)

Synchronizing Medications

1. Make a list of all the patient’s chronic medications. Document the days supply that was most recently provided to the patient and any additional refills that are remaining.
2. Determine which medications the patient needs filled today and which medications will be due next.
3. Determine the quantity of today’s medications that will be required to synchronize with the refill of the patient’s upcoming medications. The medication that will run out last will be the anchor to which all medications will sync. Refill today’s medication quantity even if it is less than what the patient regularly receives.
4. At the next refill, if all of the patient’s medications are due, refill for the total quantity of medication, either 30 or 90 days depending on legislation and insurance coverage.

Tips for synchronizing

1. Contacting patients is essential to determine if the medications are still appropriately synced. If you are unable to reach the patient or they are not regularly picking up their medications it is likely they are not taking the medications as prescribed.
2. Temporarily removing patients from the medication synchronization program may be necessary until patients can be reached to avoid unnecessary work for the pharmacy team.
Refilling Medications

Methods for determining when medications are to be refilled will vary depending on the capability and preference of each pharmacy.

A. Refilling using Autorefill

For a pharmacy that has software with an auto-refill feature and the ability to keep an electronic record of patient due dates for medications, the following method could be considered:

1. Print the auto-refill report list at the beginning of each day.
2. Review the refill list to ensure all of the patient’s medications are included. If a medication is omitted, complete the syncing process as described above to ensure resynchronization.
3. Call the patient in the afternoon or evening to inform them that their medications have come up in our system and they are ready to be picked up from the pharmacy.
4. If patient informs the team member of any changes, this is taken into account and any resynchronization is completed as required.
5. Review the number of refills left for each medication. If this is the last refill, send a refill request to the physician. If refill request are denied inform patients right away to ensure they book an appointment.
6. Process and refill all the medications.

Tips with Autorefilling

1. If your pharmacy system allows you to print autorefill reports for upcoming days, printing the report and speaking to patients ahead of time allows the pharmacy to be proactive in their refilling process as changes can be more easily identified ahead of time.
2. Be aware of narcotic and controlled medications that cannot be refilled early. Even if the pharmacy is filling ahead for upcoming days, make sure to remember to refill these medications on the day that they are due.
3. Some pharmacies may complete refilling before contacting the patients. Refilling in this manner will depend on patient and pharmacy preference.

B. Refilling using Batching

For pharmacies whose software does not have an autorefill feature, or if the pharmacy prefers not to use this feature, medication refills can be treated as a batch. In this case:

1. Complete the synchronization process for each patient.
2. Determine which day of the month patients medications will become due and place them into the batch for that respective date.
3. Run the batch each morning and review the batch list to ensure all of the patient’s medications are included. If a medication is omitted, complete the syncing process as described above to ensure resynchronization.
4. Complete steps 3-6 as per the autorefill method above.
Tips with Batching

1. When creating batches, pharmacies may have to create more than one batch category for each day of the month depending on the days supply of medications each patient is receiving. For example, patients who get their medications filled each month on the 1st can be put into batch 1a, whereas patients who get their medications filled every 3 months on the 1st can be put into batch 1b.

2. If medication become desynchronized due to a change or the lack of adherence, medications may need to temporarily be removed from the batch in order for the synchronization process to occur again before they are re-added to the batch.

C. Refilling using Grouping

For pharmacies whose software doesn't allow for or prefer not to use the autorefilling or batching methods, the process can also be easily done on paper. In this case:

1. Complete the synchronization process for each patient.
2. Determine if patients will be receiving a 28 or 84 day supply of their medications.
3. Based on the patient’s refill date, determine which week of the month medications are to be refilled.
   a. For those receiving 28 days, on a calendar, mark the first four weeks of your program as Groups A-D.
   b. For those receiving 84 days of medication, on a separate calendar, label the first 12 weeks of your program as Groups 1-12.
4. Develop a list of patients in each group based on their refill quantity and date. This will be the master list that staff members can refer to each week when determining who is due for medication refills. Additionally, place a note in each file as to which group each patient falls into for easy reference.
5. Create a binder with sections for each group to organize the required patient information.
6. Using the calendar as a guide, call patients the week their medications are due to be filled to determine if any changes have been made.
7. Review the patient’s medication file and complete any synchronization as required.
8. Process and refill all of the medications.
9. Review the number of refills left for each medication. If this is the last refill, send a refill request to the physician. If refill requests are denied, inform patients right away to ensure they book an appointment.
Tips with Grouping

1. To facilitate the continued syncing, especially when a new medication is being dispensed, a note can be made in the comment line that will print on the hard copy or an asterisk in the secondary address line will signal to staff members that the patient is involved in medication synchronization.
2. Syncing all family members into the same group reduces the number of phone calls to various households, the number of deliveries and the number of medication pick-ups.

Maintaining Synchronization

When the pharmacy team member speaks to a patient about refilling their medications, there are a few questions they can ask to identify any changes and ensure medications remain in sync.

1. Have you been to your doctor or a hospital in the past month/ three months?
   a. If so, did you receive any new prescriptions?
   b. Did the doctor make any changes?
   c. Did the doctor give you any medication samples?

2. Do you need the following medications refilled? (List the medications for the patient)
   c. If the patient say no, inquire as to why and follow up with the pharmacist.

3. Would you prefer to pick up your medications or have them delivered?
   a. If delivery, which day?

Tips for Maintaining Synchronization

1. Encourage patients to always bring in new prescriptions as soon as they are received to avoid inappropriate filling and to ensure continuity of care.
2. Use this conversation as an opportunity to highlight any programs occurring at the pharmacy this week, such as A1C screening, bone density, dietician counseling etc. Offer to make an appointment for the patient on the day they are picking up their medications.

Improving Medication Use

Medication synchronization can increase pharmacy efficiency thereby, increasing the time pharmacists can spend with patients having valuable interactions. This can lead to increased opportunity for services. Consider incorporating comprehensive counseling, medication reviews and expanded scope of practice services (smoking cessation counseling, A1C screening, cholesterol screening).

Assessing adherence

Medication synchronization makes it easy to determine if patients are taking their medications as prescribed. When a pharmacy team member identifies that a previously medication synchronized patient has become “desynced”, the pharmacist must be informed in order for them to be able to determine the underlying cause.

1. Did the patient receive new instructions from their doctor?
   a. Dose change
   b. Medication Discontinuation
2. Did the patient stop the medications WITHOUT instructions from their doctor?
   a. Side effects
   b. Lack of perceived therapeutic benefit
3. Did the patient just forget?
4. Did the patient lose their medication?
5. Is the patient taking some of their spouse’s medication because they were out and their spouse had extra of the same one?
There are many possible reasons for desynchronizations therefore having this discussion is important for the pharmacist and patient to determine their action plan in improving adherence.

1. Do we need to contact the physician for an updated prescription?
2. Is there a therapeutic alternative which is better tolerated?
3. Is there something else that patient can do to minimize a particular side effect if an alternative is not available?
4. Are the current therapies efficacious for this patient and is there an alternative that may be better?
5. Would the patient benefit from compliance packaging?

Depending on the provincial legislation, certain interventions may be compensated for through provincial payers. Complete and submit any documentation as required.

**Prescription Checking**

The synchronization of medications makes it easier for the pharmacist to complete a single, more thorough therapeutic evaluation at each refill. By having all medications present for a therapeutic check, the pharmacist can simultaneously assess for interactions, efficiency and side effects.

**Prescription Pick-up and Delivery**

Once completed, medications are either filed for pick-up or delivery. If at the end of the week the prescriptions have not been picked up, call the patient to provide a gentle reminder. If they cannot make it into the store, offer to deliver their prescriptions that day. Confirm when the patient will be home to prevent excess delivery visits.

If a patient consistently has their medications delivered and has not had recent face-to-face contact with the pharmacist, offer to have the pharmacist deliver their medications and complete a home medication review with them, in the comfort and convenience of their own home.

Having them pick up their medications late defeats some of the goals of medication synchronization.
Patient Examples

1. Refilling by grouping patients

Patient Mrs. Jane Smith has all of her medications synced and the first fill is on Tuesday, January 5th. It had previously been determined that Mrs. Smith is only able to receive a 30-day supply of medication at a time due to her drug benefits. Based on the fill date and possible refill quantity, using the sample medication synchronization calendar below, Mrs. Smith is placed in the Group A. Medications were purposely synced to the January 5th date because Patrick Smith, Mrs. Smith’s husband, also has his prescriptions refilled through the medication synchronization program at your pharmacy and she was hoping she would be able to pick everything up at one time.

<table>
<thead>
<tr>
<th>Group A</th>
<th>Group B</th>
<th>Group C</th>
<th>Group D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Smith</td>
<td>Cindy Loo</td>
<td>Norah Whistlet</td>
<td>Nicole Penner</td>
</tr>
<tr>
<td>Patrick Smith</td>
<td>Victor Bam</td>
<td>Mehgan Jones</td>
<td>Laura Tracker</td>
</tr>
<tr>
<td>Fred Black</td>
<td>Alfred Samson</td>
<td>Vikki Aspen</td>
<td>Jeffrey Tracker</td>
</tr>
<tr>
<td>Nancy Tam</td>
<td>Jason Peel</td>
<td>Jordan Craft</td>
<td>Janice Tracker</td>
</tr>
</tbody>
</table>

On January 31st, based on the grouping schedule, the pharmacy team contacts Mr. and Mrs. Smith along with the other Group A patients to ask about their medications and confirm synchronization. Although Mrs. Smith medication are not due until the Tuesday, the prescriptions are processed on the Sunday when the pharmacy is quiet to help with workflow throughout the rest of the week. The technician checks the inventory and orders any medications that are needed for that week. The technician also notes that this is Mrs. Smith's last refill of one of her medications, so she faxed a refill request to the physician to ensure continuity next month.
2. Medication synchronization

On October 6th, Mr. Kahn comes to the pharmacy complaining that he is tired of coming into the pharmacy all the time to pick up each medication separately. He asks if you can help set him up so that he only needs to come into the pharmacy once every three months. You review Mr. Kahn’s medication file and below is a summary.

**Today’s Date: October 6**

<table>
<thead>
<tr>
<th>Medication</th>
<th>Instructions</th>
<th>Last Fill Date</th>
<th>Quantity</th>
<th>Days Supply</th>
<th>Days since last fill</th>
<th>Next Fill date</th>
<th>Days until due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication A</td>
<td>1 tab daily</td>
<td>September 1</td>
<td>30 tabs</td>
<td>30</td>
<td>35</td>
<td>October 1</td>
<td>5 days late</td>
</tr>
<tr>
<td>Medication B</td>
<td>1 tab daily</td>
<td>July 30</td>
<td>90 tabs</td>
<td>90</td>
<td>68</td>
<td>October 28</td>
<td>Due in 22 days</td>
</tr>
<tr>
<td>Medication C</td>
<td>1 tab twice daily</td>
<td>August 20</td>
<td>120 tabs</td>
<td>60</td>
<td>47</td>
<td>October 19</td>
<td>Due in 13 days</td>
</tr>
</tbody>
</table>

On October 6th, fill Medication A with 22 days supply bringing the patient to next fill on October 28 to align with Medication B fill date. On October 19 Medication C is due for fill. Provide the patient with a 9 days supply to October 28.

**Today’s Date: October 19**

<table>
<thead>
<tr>
<th>Medication</th>
<th>Instructions</th>
<th>Last Fill Date</th>
<th>Quantity</th>
<th>Days Supply</th>
<th>Days since last fill</th>
<th>Next fill date</th>
<th>Days until due</th>
<th>Today fill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication A</td>
<td>1 tab daily</td>
<td>October 6</td>
<td>22 tabs</td>
<td>22</td>
<td>13</td>
<td>October 28</td>
<td>Due in 9 days</td>
<td></td>
</tr>
<tr>
<td>Medication B</td>
<td>1 tab daily</td>
<td>July 30</td>
<td>90 tabs</td>
<td>90</td>
<td>81</td>
<td>October 28</td>
<td>Due in 9 days</td>
<td></td>
</tr>
<tr>
<td>Medication C</td>
<td>1 tab twice daily</td>
<td>August 20</td>
<td>120 tabs</td>
<td>60</td>
<td>60</td>
<td>October 19</td>
<td>9 days supply</td>
<td></td>
</tr>
</tbody>
</table>

On October 28th, all 3 medications are due. A full three month supply of all 3 medications can be given today. In 90 days, on January 26th, Mr. Kahn will be able to refills all of his medications again at the same time. The patient will only have to request “fill all my medications” as opposed to providing prescription numbers or trying to pronounce medication names.
3. Adding New Medications
On December 13th, Mrs. Casady comes to the pharmacy stating her doctor just diagnosed her with type 2 diabetes and is starting her on Medication G. She already received her medications though the medication synchronization program and hopes she can have this one refilled at the same time. Her medication profile on December 13th is as follows:

Today's Date: December 13

<table>
<thead>
<tr>
<th>Medication</th>
<th>Instructions</th>
<th>Last Fill Date</th>
<th>Quantity</th>
<th>Days Supply</th>
<th>Days since last fill</th>
<th>Next fill date</th>
<th>Days until due</th>
<th>Today fill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication D</td>
<td>1 tab daily</td>
<td>September 28</td>
<td>90 tabs</td>
<td>90</td>
<td>76</td>
<td>December 27</td>
<td>Due in 14 days</td>
<td>-</td>
</tr>
<tr>
<td>Medication E</td>
<td>1 tab daily</td>
<td>September 28</td>
<td>90 tabs</td>
<td>90</td>
<td>76</td>
<td>December 27</td>
<td>Due in 14 days</td>
<td>-</td>
</tr>
<tr>
<td>Medication F</td>
<td>1 tab twice daily</td>
<td>September 28</td>
<td>180 tabs</td>
<td>90</td>
<td>76</td>
<td>December 27</td>
<td>Due in 14 days</td>
<td>-</td>
</tr>
<tr>
<td>Medication G</td>
<td>1 tab twice daily</td>
<td>NEW</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>13 days supply</td>
<td></td>
</tr>
</tbody>
</table>

All of Mrs. Casady's current medications are due to be refilled in 14 days. Filling the Medication G for 13 days today (26 tablets) will result in it being due for a refill, along with her other medications, in 14 days on December 27. It is important to explain that this partial refill will only occur today. If Mrs. Casady continues to take her medications as prescribed, she will receive a full 90 day supply of all her medications, including the Medication G, in 14 days.

4. New Profile Transfers
When a new patient transfers all of their medications to your pharmacy, this is the perfect opportunity to sync medications from the start. If you notice the last fill dates are all different, take this time to discuss with your patient how you can help them have their medications all filled at the same time. Syncing of new medication profiles are done in the same fashion described in example 2.

5. Non-adherence
Today is October 30th, and Mr. Lee is due to have his medications refilled tomorrow. You call him today to identify if there have been any changed. He says he is completely out of his Medication B, has about 2 weeks left of his Medication E and has lots of his Medication H. The technician transfers Mr. Lee to the pharmacist to talk about his medication therapy. He states that he sometimes forgets to take his Medication E and he doesn't really think the Medication H is important so he isn't really worried about taking it.
At this point there are a number of steps the pharmacy must take:

1. The patient is no longer synchronized and resynchronization must be achieved again through the earlier steps in the guide. There is no point in refilling the Medication E and Medication H at this time if the patient still has medication at home.

2. Discuss the patient’s Medication E use. It sounds like the patient is onboard with taking this agent however this provides an opportunity to discuss its benefits. Highlight, that although the patient may not sense the improvement in blood pressure when taking the medication, there are a number of long term benefits.
   a. Counsel and resync.

3. Discuss the patient’s Medication H use. Educate Mr. Lee on the potential benefits of the agent and the quality of evidence that is behind such benefits. Discuss the patients options.
   a. If Mr. Lee wants to discontinue the medication, follow up with the physician citing the lack of benefit the patient is receiving with inconsistent medication use.
   b. Depending on the doctors response, either discontinue the agent, resync the agent to the patient’s medication or advise the patient to make an appointment for further follow-up.

<table>
<thead>
<tr>
<th>Medication</th>
<th>Instructions</th>
<th>Last Fill Date</th>
<th>Quantity</th>
<th>Days Supply</th>
<th>Days until due</th>
<th>Tablets Remaining</th>
<th>Today fill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication E</td>
<td>1 tab daily</td>
<td>August 2</td>
<td>90 tabs</td>
<td>90</td>
<td>Due tomorrow</td>
<td>14</td>
<td>none</td>
</tr>
<tr>
<td>Medication B</td>
<td>1 tab daily</td>
<td>August 2</td>
<td>90 tabs</td>
<td>90</td>
<td>Due tomorrow</td>
<td>-</td>
<td>13 days</td>
</tr>
<tr>
<td>Medication H</td>
<td>1 tab daily</td>
<td>August 2</td>
<td>90 tabs</td>
<td>90</td>
<td>Due tomorrow</td>
<td>“LOTS”</td>
<td>none</td>
</tr>
</tbody>
</table>

In 14 days, refill both the Medication B and Medication E. If the physician chooses to discontinue the Medication H, fill 90 days for the Medication B and the Medication E. If the physician chooses to continue the Medication H and the patient agrees, only fill the quantity of Medication E and Medication B that will result in them being due for refill the same day the patient runs out of his Medication H.
Marketing and Promotion

The first, and most cost-effective, promotion of the medication synchronization program involves pharmacy team member discussion with their patients about medication synchronization and its benefits. Small notices can be made and attached to prescription bags as a cue for both team members and patients.

Target caregivers. They are often the ones who are calling in prescriptions at the last minute and rushing to pick up medications for their parents, spouse, or neighbours. Discuss with them how medication synchronization can help increase organization and reduce their stress.

Design eye-catching posters that can be used in-store to draw attention to the program. Patients who inquire about a program are already interested and don’t need to be convinced.

Add the medication synchronization program to any of your pamphlets that list your pharmacy services, just as you would a diabetes or cardiovascular program.

If you use an automated telephone service, consider adding a voice over at the beginning or during holds, to inform patients of this exciting new offer for them.
Frequently Asked Questions

1. **Question:** I have some patients who want their medications synced to a 60 day supply. Is it possible to sync to quantities other than 30 or 90 days?

   **Answer:** Yes. Medication synchronization can be done for ANY interval. Ultimately, it comes down to patient preference, provincial legislation, and the allowance of third-party payers. However, if you are using the grouping or batching methods, you will have to create a different collection of groups or batches for each interval you are using. Therefore, the intervals that you provide medication synchronization for will also depend on the capacity of your pharmacy.

2. **Question:** In a large volume store using the autorefill method, do you still call each patient on the report to ensure, if in fact, they are actually out of the medications or there were any changes?

   **Answer:** Before patients enroll they are provided with a significant amount of education so that they know what to expect. One point of discussion is that unless patients inform the pharmacy of changes, they can expect their medications to continue to be refilled as appropriate. Patients are also instructed to be proactive about informing the pharmacy of any changes or deviations from their schedule. That being said, continued communication is essential in order for medication synchronization to be successful. Therefore, the pharmacy should make every effort to speak with medication synchronization patients before each refill. As patients become more familiar with the program and pharmacies more familiar with their patients, these conversations become shorter.

3. **Question:** Using the grouping method, patients are contacted the week that their medications are due. What about patients whose medications are due on the Sunday or Monday? How are you able to identify changes in advance?

   **Answer:** If possible, it is always best to try to stay a day ahead of refill dates in order to proactively identify issues. In the case of grouping, briefly reviewing the patients for the upcoming week towards the end of the previous week, can help mitigate this challenge. Additionally, marking this early in the week can help signal to the pharmacy team that these are the first patient profiles that they should address.

4. **Question:** My patient is frequently non-adherent. Do I need to keep resyncing medications?

   **Answer:** Yes. However, the goal of medication synchronization is to improve patient adherence. We hope that with medication synchronization, erratic medication taking behaviour will be reduced and synchronization frequency will be significantly reduced.
Conclusion

Medication synchronization is a great way to help pharmacies put their patients on track. Medication synchronization helps to create a proactive workflow giving pharmacists the opportunity to intervene early and effectively.\textsuperscript{1} Although synchronizing medications may sound like a lot of work at first, once the pharmacy team gets comfortable with the program, implementation will become quicker and more intuitive. In addition, the work put in initially has the potential to be time saving down the line. When the workflow is more efficient, pharmacists are able to spend more time with patients and provide additional clinical services.\textsuperscript{1,3} All of these things will help strengthen the relationship between the patient and the pharmacy, leading to, most importantly, better patient satisfaction.
References:


### Medication Synchronization Quick Guide: Master Checklist

**The goal:** Same day refilling of all chronic medications to help improve patient adherence and satisfaction

### Working with Your Patients

#### Enrolling Patients
- **Identifying Patients: Who?**
  - Individual medication refill(s) and/or multiple pick-up dates

#### Synchronizing Medications
- Next refill date: Feb 25, 2016

#### Refilling Medications
- **Auto-refilling:**
  - Print the report every morning
  - Review list for completion and resynchronize if needed
  - Refill medications
  - Call the patient and make any changes if required

#### Maintaining Synchronization: Questions for the patient
- Have you been to the doctor or hospital since our last call?
- Did you receive any new prescriptions?
- Did the doctor make any changes to your existing prescriptions?
- Do you need any of the following medications (list them) refilled?
- If no, ask why and refer to the pharmacist

#### Assessing Adherence: Desynchronization detected
- New instructions from the doctor?
- Changes not due to instruction from the doctor?
- Other
- Dose change
- Discontinuation
- Side effects or lack of perceived benefit?
- Forgot to take
- Taking old or spouse’s medications

#### Pharmacist Follow Up
- Evaluate options and provide recommendations
- Compliance packs
- Other
- Document any findings
- Complete and file for pharmaceutical opinions if appropriate
- Follow up with the physician as required

#### Pick-up and Delivery
- Reminder call if medications have not been picked up within the week
- Set a delivery date
- Schedule Home MedsCheck
- Ensure the patient will be home

### Working with Your Patients

#### Sample Medication Profile for Mr. X:

<table>
<thead>
<tr>
<th>Medication</th>
<th>Instructions</th>
<th>Last fill Quantity</th>
<th>Days Supply</th>
<th>Last Fill Date</th>
<th>Days Since Last Fill</th>
<th>Days Until Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication A</td>
<td>1 cap daily</td>
<td>30 caps</td>
<td>30</td>
<td>1/1/2016</td>
<td>14</td>
<td>16 days</td>
</tr>
<tr>
<td>Medication B</td>
<td>2 tabs BID</td>
<td>120 tabs</td>
<td>30</td>
<td>12/16/2015</td>
<td>30</td>
<td>Today</td>
</tr>
<tr>
<td>Medication C</td>
<td>1 tab daily</td>
<td>60 tabs</td>
<td>60</td>
<td>12/27/2015</td>
<td>19</td>
<td>41 days</td>
</tr>
</tbody>
</table>

1. Identify the medication due for refill: Medication B
2. Calculate the quantity of today’s medication to disperse (quantity needed to reach the refill date of the patient’s next medication to be due)

#### Days remaining of anchor medication = (days dispensed) – (days since dispensed) = Days supply of medication due to dispense

Based on the equation above: (30 days of Medication A dispensed – 14 days since Medication A dispensed) = Days supply of Medication B to dispense today: 16 days

3. Dispense the appropriate quantity of medication B to last Mr. X 16 days:

<table>
<thead>
<tr>
<th>Total Quantity = (number of days required) X (number of pills taken per day as per the instructions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. X takes 2 tablets twice daily (or 4 tablets daily)</td>
</tr>
</tbody>
</table>

### Next refill date: Jan 15, 2016

#### Medication A
- 1 cap daily
- 30 caps
- 30
- 1/1/2016
- 14
- 16 days

#### Medication B
- 2 tabs BID
- 60 tabs
- 60
- 12/27/2015
- 33
- 25 days

4. Repeat steps 1-3 above
   a. Medication due: Medication A
   b. Days Remaining of Medication A = (60 tabs last dispensed – 35 days since last dispensed) = 25
   c. Dispense 25 days of Medication A and Medication B today
   d. Medication B = (25 days) x (4 tabs daily) = 100 tabs
   e. Medication A = (25 days) x (1 tab daily) = 25 tabs

### Next refill date: Feb 25, 2016

#### Medication A
- 1 cap daily
- 25 caps
- 25
- 1/31/2016
- 0
- Today

#### Medication B
- 2 tabs BID
- 100 tabs
- 25
- 1/31/2016
- 0
- Today

#### Medication C
- 1 tab daily
- 60 tabs
- 60
- 12/27/2015
- 60
- Today

5. All medications are due today
6. Fill all as per patient preference (ex. 30 or 90 days)
7. Track Fill date as per selected tracking method (autorefill, batching or manual paper system)

This Medication Synchronization Tool was made available by Pfizer Canada Inc.
Medication and History List for: ________________________________

**PATIENT INFORMATION**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Date of Birth:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td>Health Plan:</td>
</tr>
</tbody>
</table>

**Medical Conditions**

**Comments:**

ASK THE FOLLOWING: (1) Have you been to your doctor or a hospital since our last call? (2) Did you receive any new prescriptions? (3) Do you need the following medications refilled?

<table>
<thead>
<tr>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUNE</th>
<th>JULY</th>
<th>AUG</th>
<th>SEPT</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
<th>NOTES</th>
</tr>
</thead>
</table>

**Current Medication & Strength**

<table>
<thead>
<tr>
<th></th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUNE</th>
<th>JULY</th>
<th>AUG</th>
<th>SEPT</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
<th>NOTES</th>
</tr>
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</tr>
</tbody>
</table>
Through enrollment in the Medication Synchronization program, the pharmacy team at [Enter Pharmacy ABC], will help to align your medication fill dates of your chronic medications. This will help reduce the number of visits and calls to the pharmacy. With medications filled through the program, your pharmacy team will take a proactive approach in contacting you before your medications are due to ensure refills are available and medications are up to date before you come into the pharmacy. This means, when you come into the pharmacy, the team will be able to take more time with you to answer questions about your medication therapies and ensure you are receiving the best care.

By enrolling in the Medication Synchronization program you agree to the following:

1. More frequent/partial refills may be required initially until medication fill dates are aligned. This may require you to pay extra dispensing fees.
2. To allow the pharmacy to contact your physician on your behalf to obtain refills as needed.
3. To call the pharmacy or drop off updated prescriptions before your fill date to help the pharmacy keep your record up to date.
4. To allow the pharmacy to contact you with the information you provide to remind you about prescription renewals.

The goal of the program is to help improve both your medication use and your satisfaction with the care provided by your pharmacy team.

Personal information; your name, date of birth, home address, phone number and prescribed medications, collected from you will be used by [Enter Pharmacy ABC name] to register you in the Medication Synchronization program, to contact you for prescription renewals or changes, and to contact your physician regarding changes in your refills related to this program.

By submitting your personal information, you consent to the manner of collection, use and disclosure of personal information as described above. If you later change your mind about such collection, use and disclosure for any reason, you may withdraw your consent, by contacting us as set forth below. You have a right to access and correct your information, where required. If you have any inquiry concerning your personal information, please contact us at [Enter Pharmacy ABC, mailing address] or by phone at [Pharmacy ABC phone #]. Further information about this pharmacy’s privacy practices is available at [Enter Pharmacy ABC phone number].

[Use the next clause if you are using email communication with patients for this program]

By providing your electronic address, you consent to receiving electronic communications containing information and updates from the [Enter Pharmacy ABC name] relating to the Medication Synchronization Program. You can withdraw your consent to receive such communications by following the instructions provided in the electronic communication. You can contact the pharmacy at any time at Medication Synchronization Program at [Enter Pharmacy ABC mailing address] and [Pharmacy ABC email address or web address or phone number].

Include this clause in your communications and have an unsubscribe clause like this:

This message is sent by ⬤⬤⬤ [Insert Pharmacy ABC name, mailing address and one of e-mail address]. You may unsubscribe to further messages by ⬤⬤⬤ [Select as appropriate: If e-mailing, insert relevant e-mail address or if e-mail unsubscribe is not practical, insert “clicking on the unsubscribe link below”].

Patient Name: _____________________________________________  Pharmacist Name: ____________________________________________

Patient Address: _______________________________________________________________________________________________

Patient Phone Number: __________________________________________________________________________________________

Patient Email Address: [only if using email communication for this program and will get consent] ____________________________

Patient Signature: _____________________________________________  Pharmacist Signature: _______________________________________

Date: _____________________________________________  Date: _____________________________________________
December 16, 2015  
Dr. A. Jones  
555 Main Street  
Pharmacy, ON  
Phone: (416) 123 - 4444 / Fax: (416) 123 - 5555

Dear Dr Jones:

Re: Jane Smith (patient)    DOB: March 25, 1954

Our pharmacy is dedicated to optimizing the health of our patients. We offer various services to accomplish this and I’d like to inform you of our new initiative, a coordinated refill program to patients called Medication Synchronization. Medication Synchronization is designed to refill all of the patient’s chronic medications together, on the same day, either every month or every three months. The goal is to improve patients’ medication adherence. Medication Synchronization helps the pharmacy ensure patients refill their prescriptions on time and reduces the number of trips the patient needs to make to the pharmacy.

At each refill, we contact the patients to review their medications, identify any changes, discuss physician visits or recent hospitalizations, and answer any questions they may have about their therapy. It is our goal to help our patients take the proper medications, as directed, and to help them understand the goals of their prescription regimen.

Our Medication Synchronization program will also benefit your practice as we aim to streamline prescription refills: instead of sending you multiple refill requests, you will receive only one fax requesting all the patient’s medication refills when it's required. We hope this will eliminate last-minute phone calls or faxes to your office.

To start our patient on this service, a short-fill prescription may be needed to align all chronic medications to a single day. If so, a fax will be sent to request your authorization.

We are pleased to partner with you in the care of our patient. Please contact me if you would like program brochures for your office to share with other patients.

If you have any questions or would like to discuss this patient’s medication therapy, please contact me at your convenience.

Sincerely,

Pharmacist
Do you struggle to take your medication as prescribed?

**ARE YOU ONE OF 50 PERCENT OF CANADIANS NOT TAKING THEIR MEDS AS PRESCRIBED**

We can help with that.

Your trained community pharmacists will work with you to keep your medications on track.

**SOLUTIONS**

Do you struggle to take your medication as prescribed?

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Do you take your medications on time?

Solutions
