A Toolkit for Implementation

Membership Pharmacy Model

Good Shepherd HEALTH

THE UNIVERSITY OF TENNESSEE HEALTH SCIENCE CENTER

Community Pharmacy Foundation

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Billing: Individuals and Companies

Recurring Billing Platform

- **Membership Pharmacy Models** require recurring billing of individuals (i.e., patients) or organizations (i.e., employer groups)
- **Recurring billing software** is used by many organizations to manage their subscription-based businesses (e.g., fitness centers, car washes, food delivery companies)
- Selection of a **recurring billing software** platform is based on the unique needs of the pharmacy, and may include things like:
  - Number of transactions per month
  - Types of payment collected
  - Volume of members

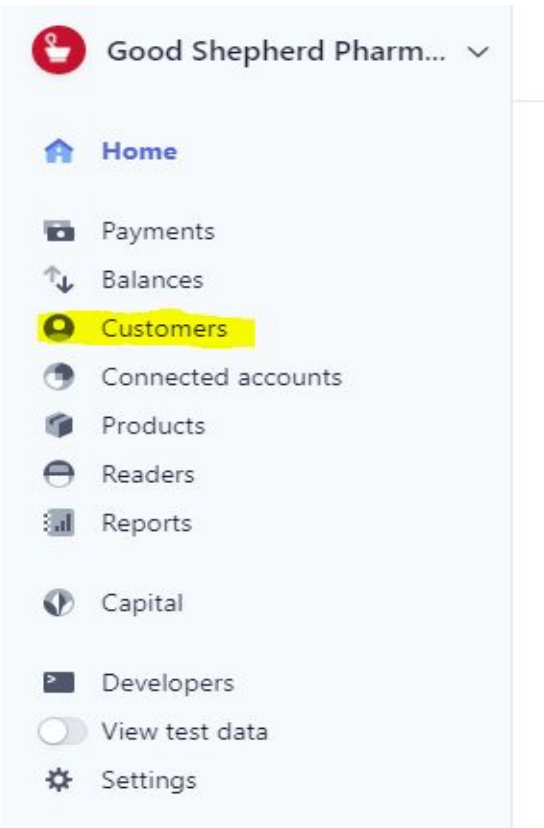
Case Study: Recurring Billing Platform

- **Case Example:** Stripe©
  - Good Shepherd Pharmacy used Stripe for their **Membership Pharmacy Model**
  - In the following pages we will outline how Stripe© can be applied to a Membership Pharmacy for billing

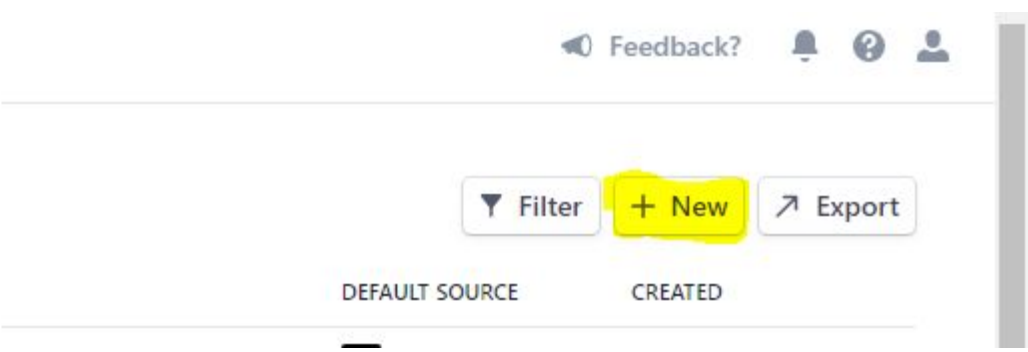
Stripe (Billing Platform)

ADD NEW CUSTOMER

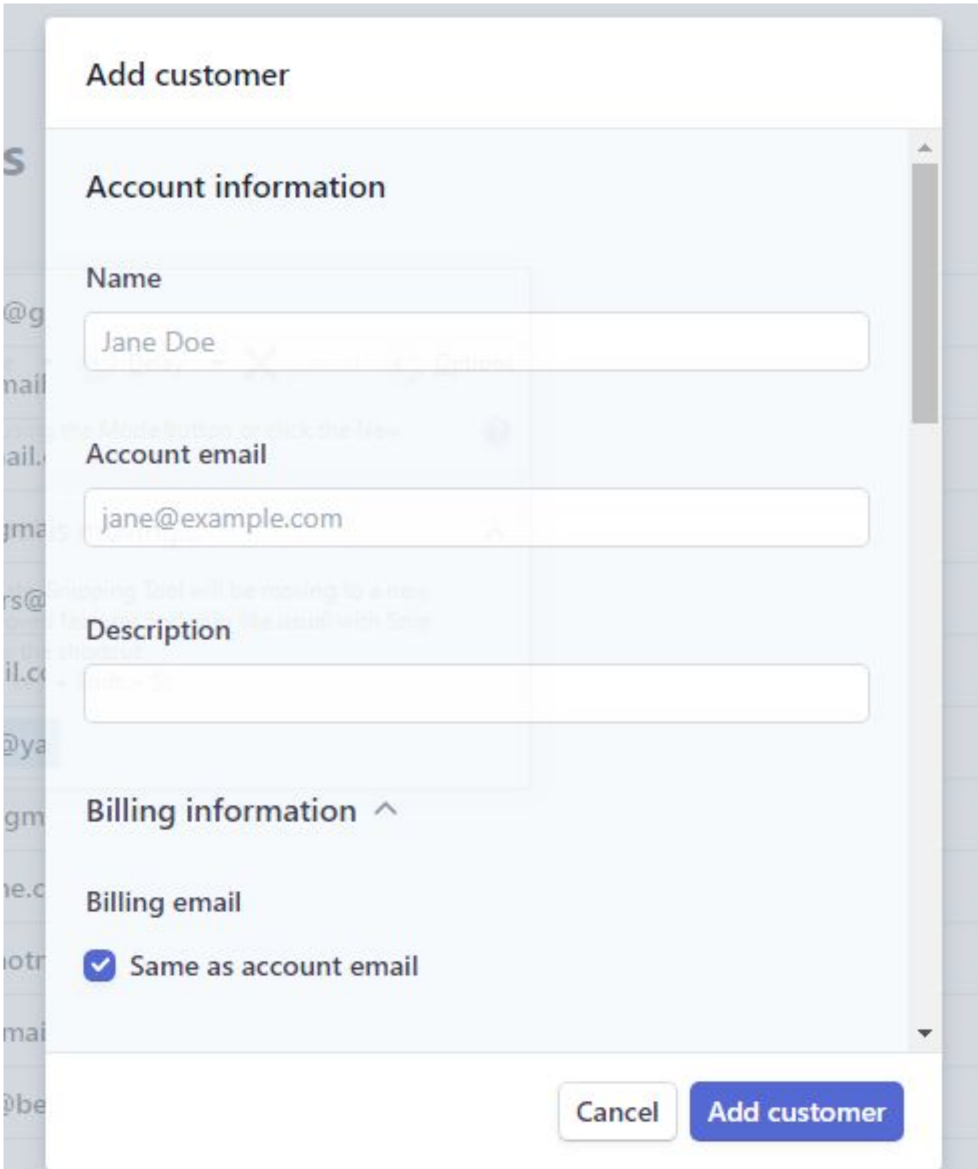
Click on Customers on right hand side of screen



1.) Then click on + New on right side of screen:



2.) Add in Name, email, Description (name again), Address and Phone number in each field and select add customer (blue box on bottom right of box

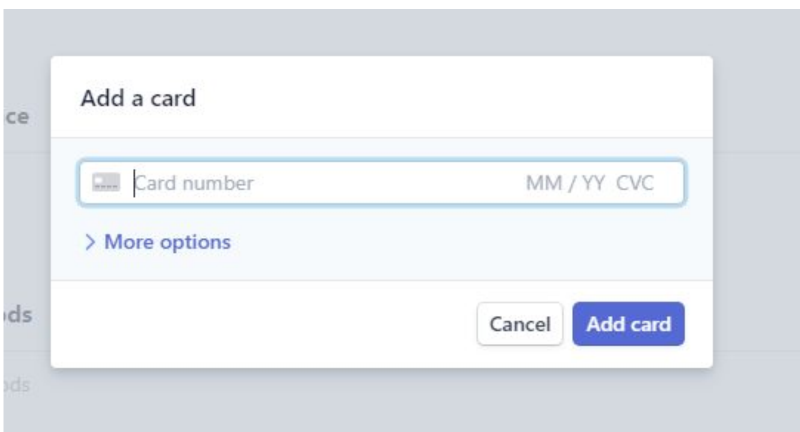


3.) Now you have created a profile to access to go into and add memberships and payment methods. Double click on patient to access full profile

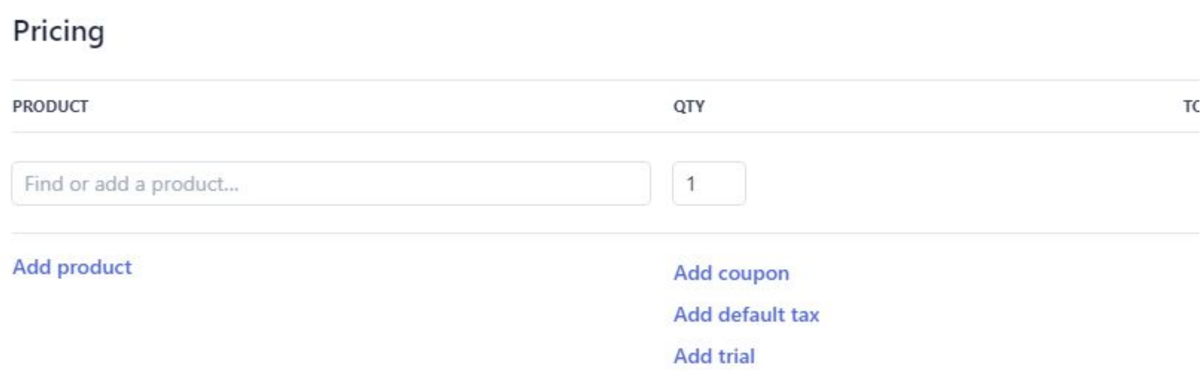
4.) Create and add subscriptions to patient: click create subscription

5.) Add Payment Method : Click + Add Card

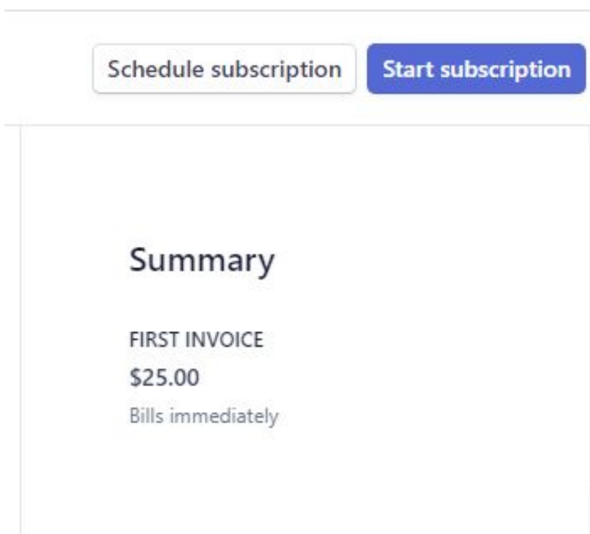
Fill in card number , expiry date and CVC or CVV #



6.) Add products for memberships: Click drop down box find product and select the products needed for each customer

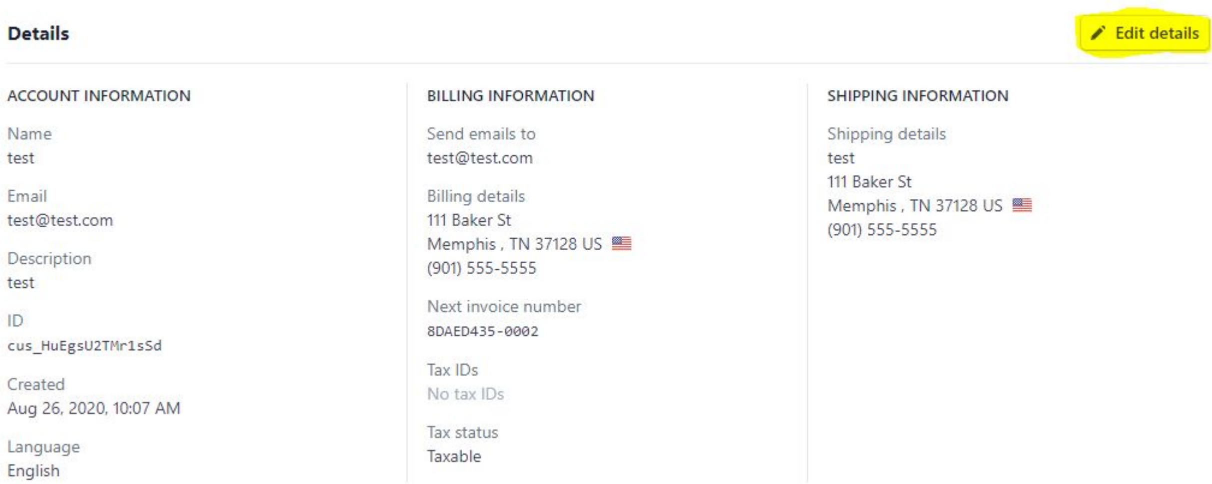


Then Click start subscription (blue box in top right hand corner)



EDIT PROFILE

1.) Select edit details



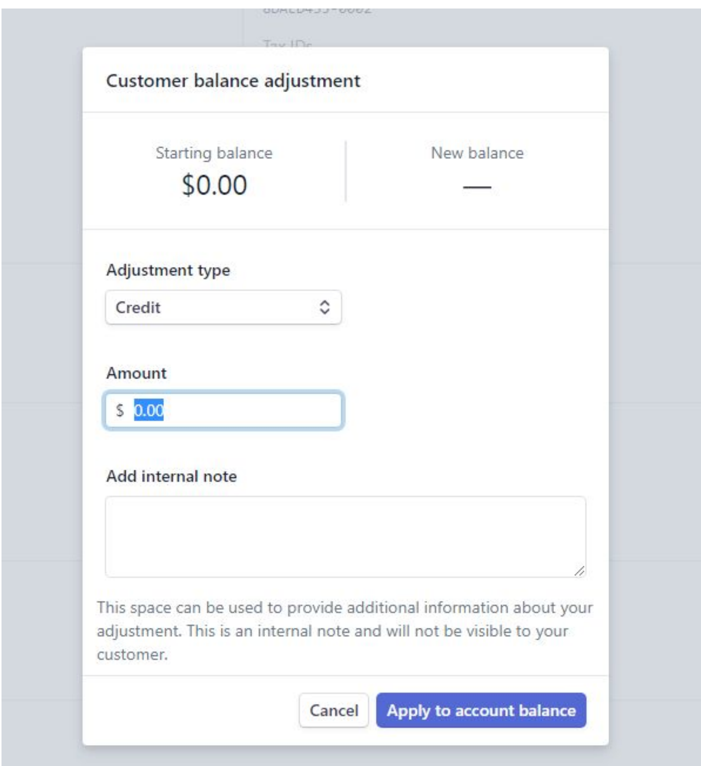
The new box will open up and here you can edit patient name, address, email and phone number and then click blue box at the end to update

ADD A CREDIT

If someone doesn't need a refund (takes 7-10 business days) offer credit that will be applied to the next transaction

1.) Click + add balance adjustment

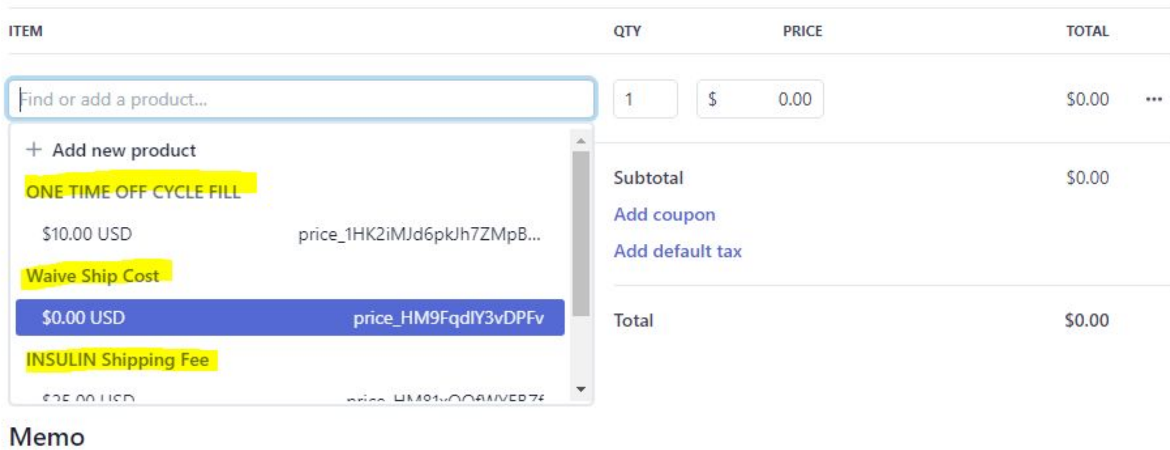
2.) Add amount, note (why credit is given) and click apply to account



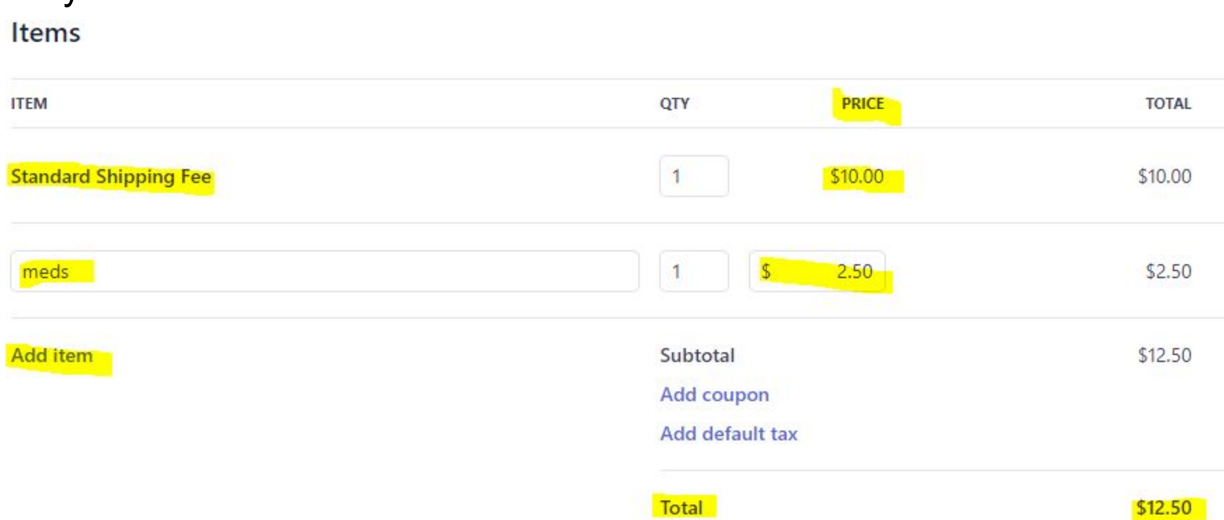
ADD A PENDING INVOICE

1.) Click on + Create Invoice

2.) Select if it is a One time off cycle fill,waive shipping,shipping fee or insulin shipping

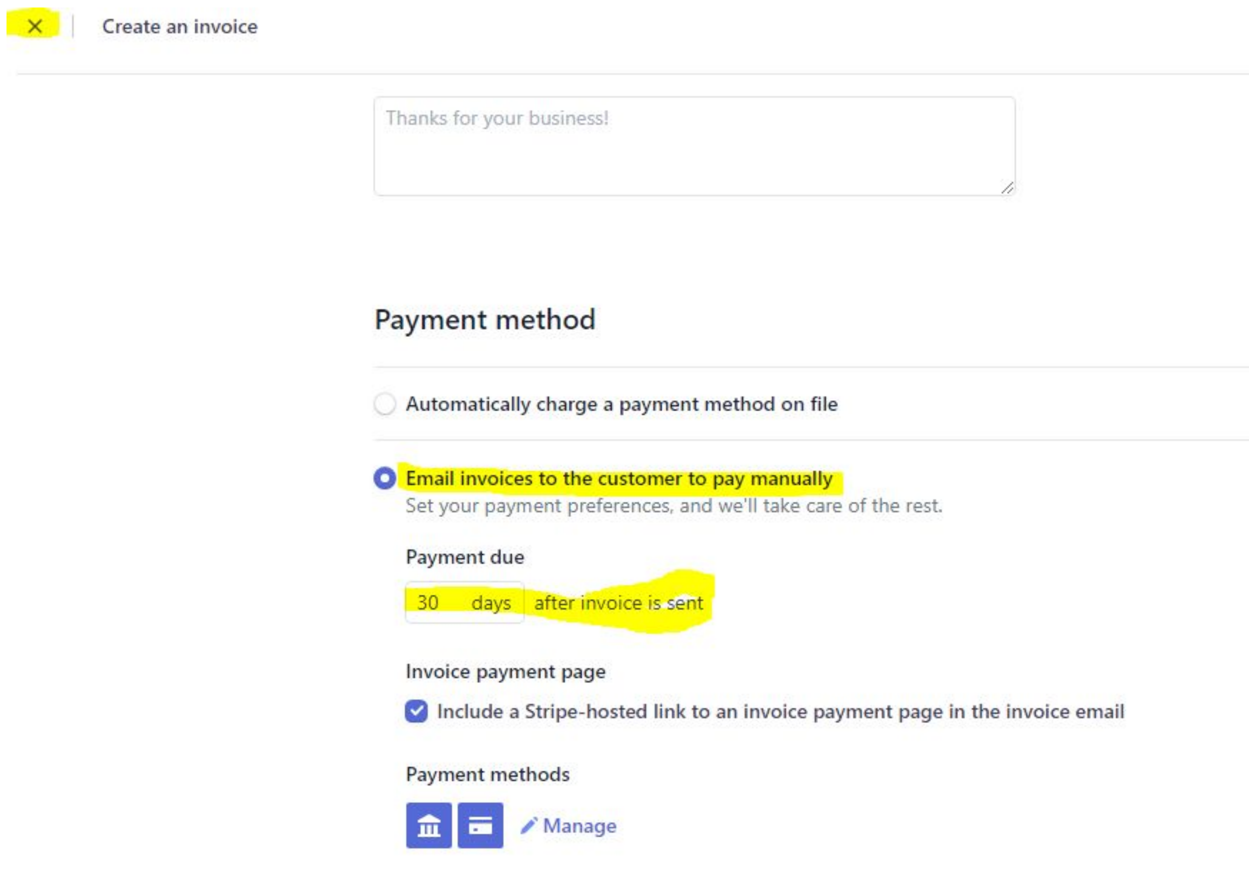


3.)Once you select whatever shipping fee you click on “ADD ITEM” then typy “meds” and under price put whatever med cost if any...if there is no med cost do not click “add item” you will only need the shipping fee.Make sure your total is correct.



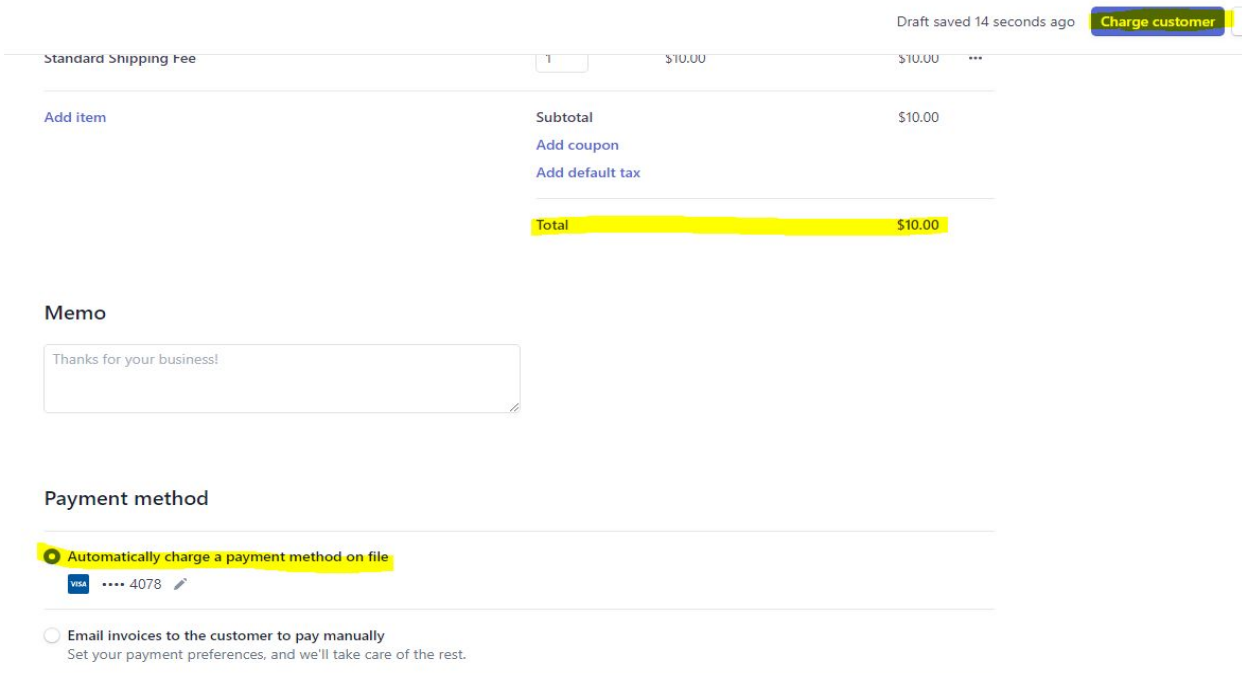
4.)Scroll down to where it says “Payment Method” you will select the option “Email invoices to the customer to pay manually” under payment due you will put in how many days do you want for it to be charged..We would basically do this just for batch when we are doing check-in-ready(pending payments to set up to run at end of batch)

5.) After you add the due date you just click the X on the top left corner.

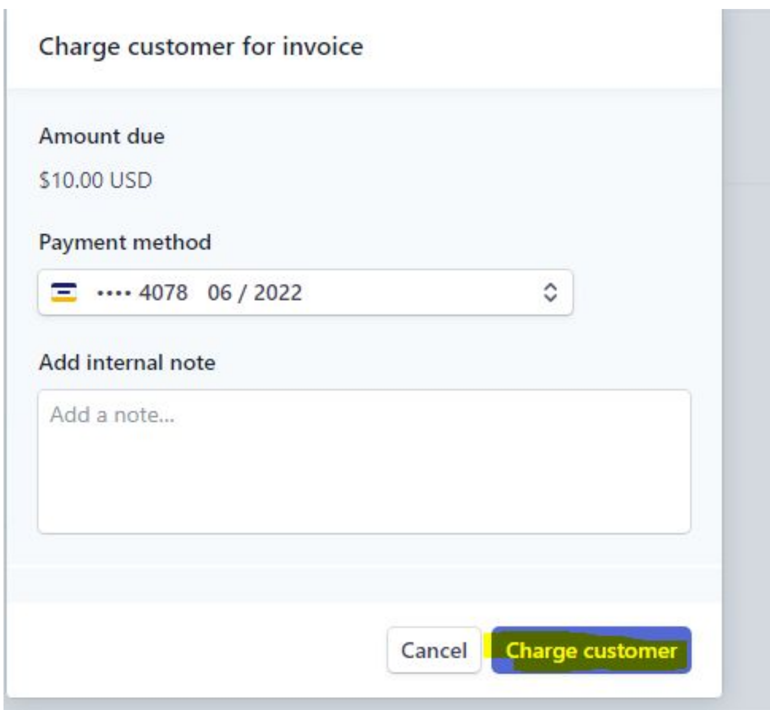


6.)After clicking on the X it should say "draft" with your total beside it ..THIS IS TO CREATE A PENDING INVOICE

7.) TO GO AHEAD AND CHARGE PATIENT… instead of clicking the second option you will click “Automatically charge a payment method in file” then click “Charge customer” on the top left corner . Make sure your total is right before you charge.

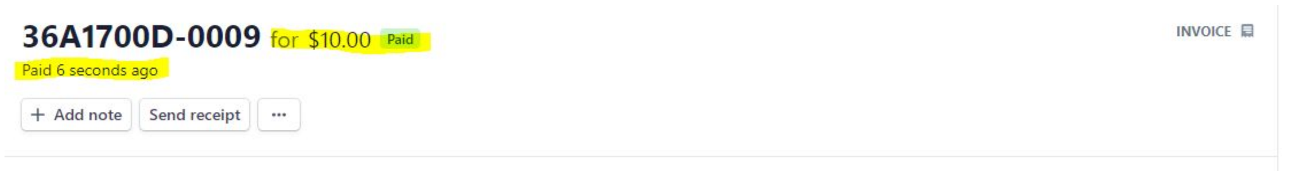


8.) Click “Charge Customer” again



9.) It should say “Paid” if the payment goes through.If it doesn't go through you will not send until they pay.Make a gold task in glip to track transaction and notify patient by text or phone call to make arrangements on past due Amount

Paid Example:

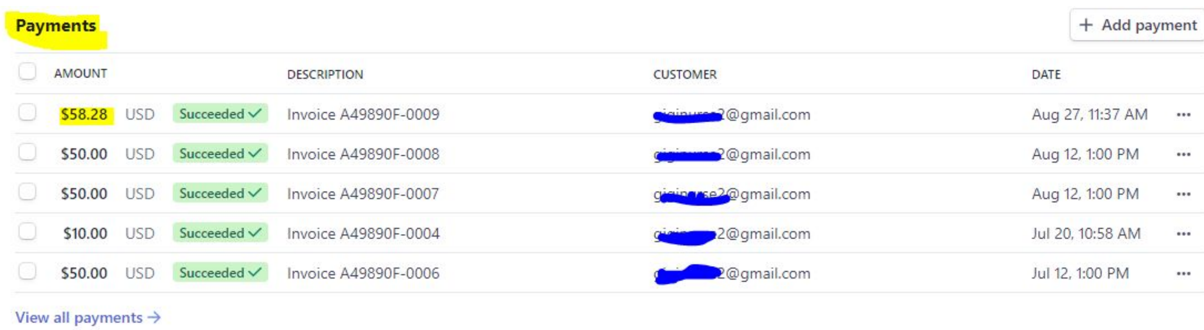


Denied Example:

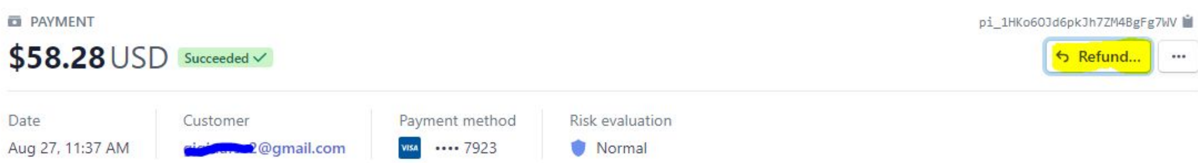
REFUND

Remember you can offer a refund or credit. Refunds take 7-10 business days to go back onto patient's accounts.

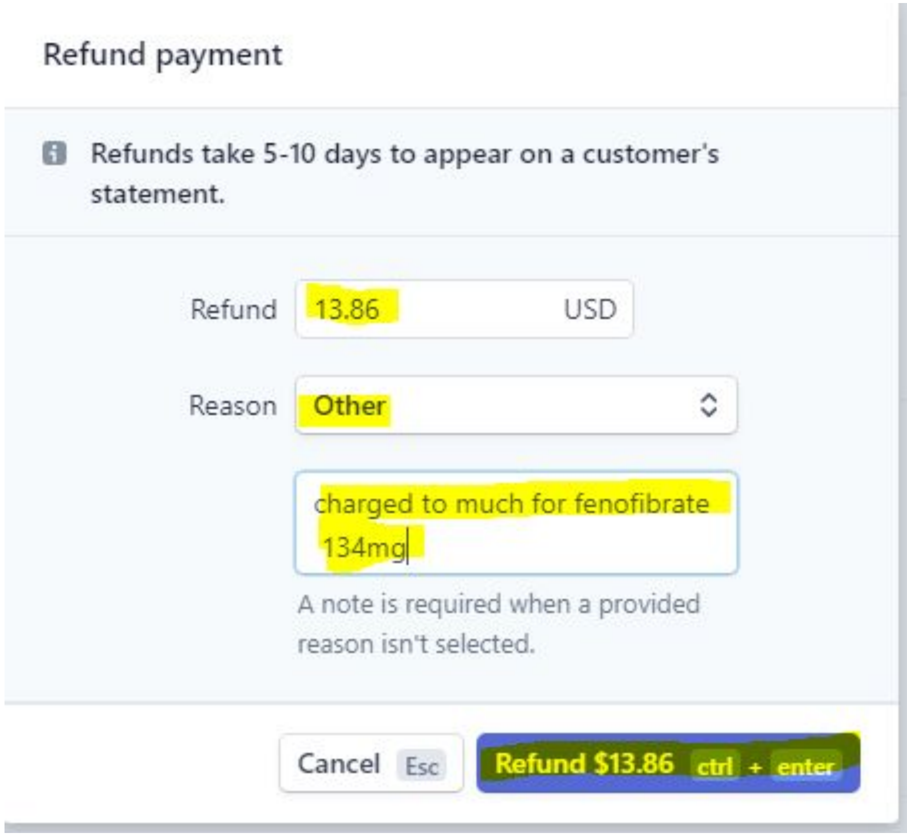
1.) Once you are in the pt profile go to payments and make sure you select the right transaction you are wanting to create a refund on



2.) You will then click on "refund" on the top right corner.



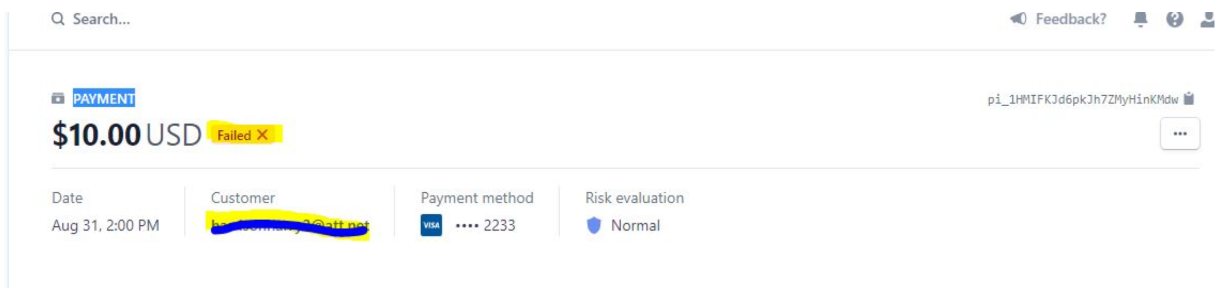
3.) You will put how much you are refunding beside “refund” and add your reason for the refund.Then click REFUND



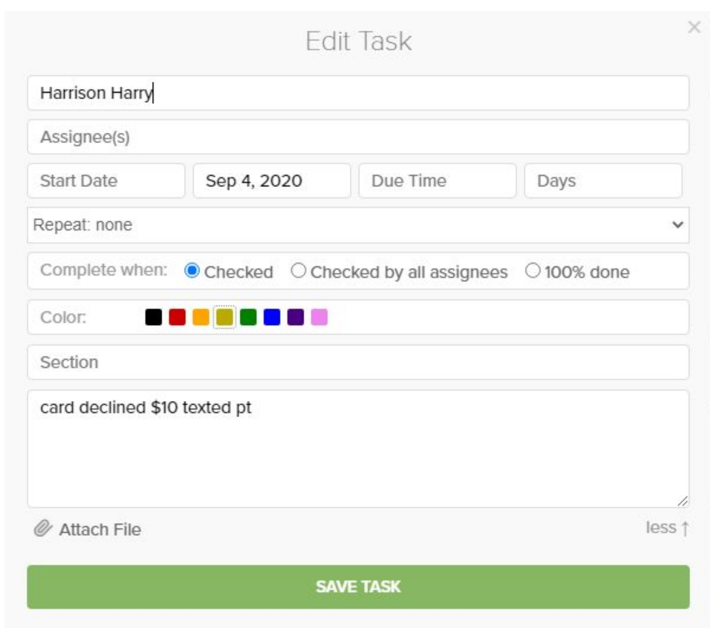
4.) It should say “Partial refund” beside the total amount you can just click where it says partial refund and it will tell you how much was refunded just make sure it is right and you are done.

CARD DECLINE

1. If a pt card decline it will look like this ..it will say failed and the total beside it



2. **You will have to let the pt know that his/her card declined..you will text the pt on “Zipwhip” if the pt doesn't text you will have to call and leave a voicemail if they do not answer.**
3. **After letting the pt know you will make a (gold) task on glip..put pt name and due date under comments just out that the ot card declined and that you whether texted/called pt and put the total the pt calls back and someone else answers.calls back and someone else answers.**

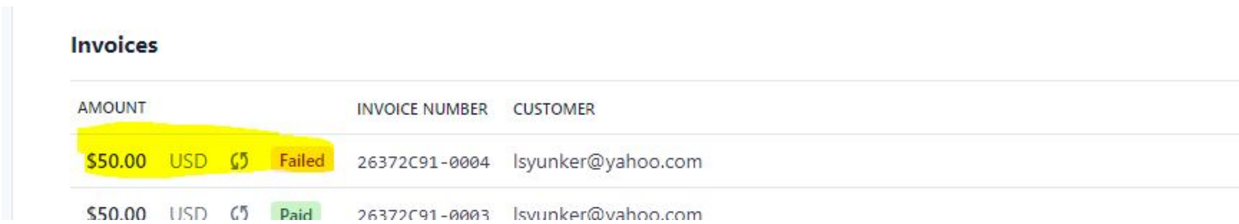


4.

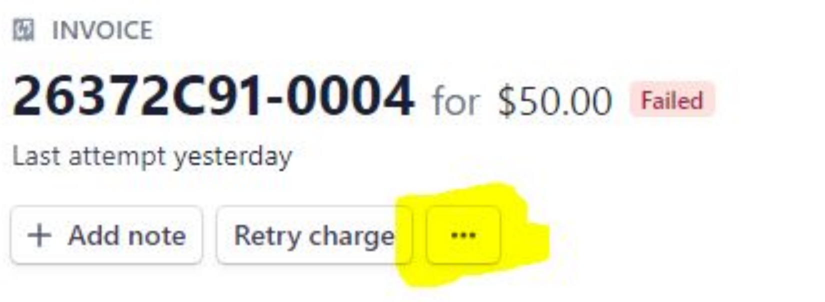
VOID A PAYMENT

Example: Patient has a past due payment of invoice and decides they no longer want the transaction and you want to void it so it will won't keep trying to auto collect charge.

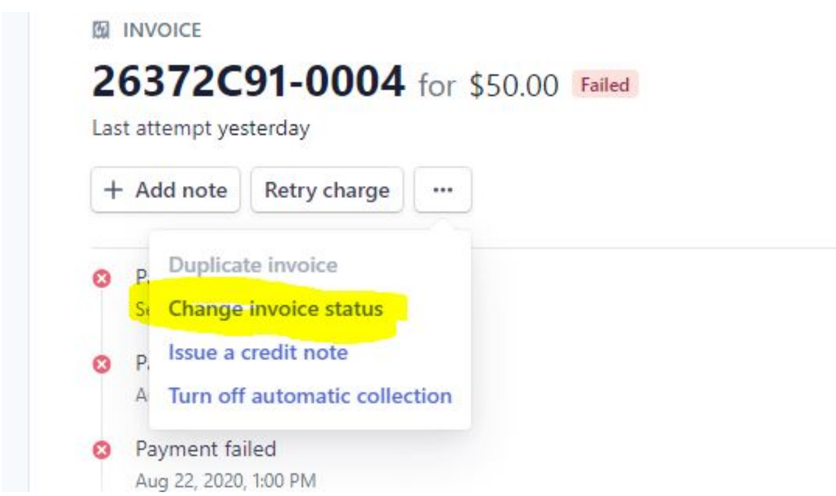
Click Invoice you want to void:



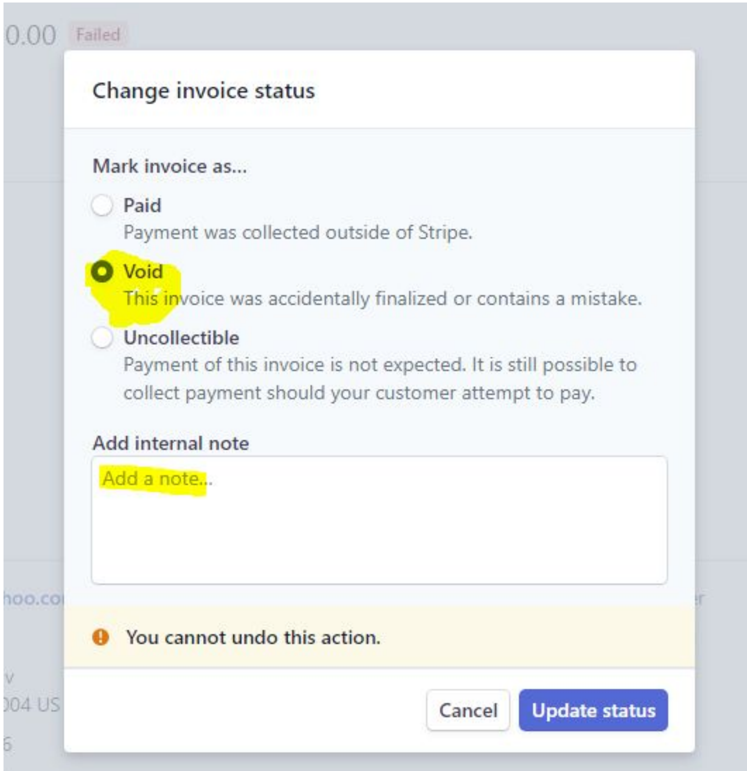
Select the …



Select change invoice status

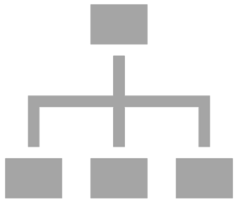


Select Void and add a note why
Then select update status



When you go back to main profile screen it should now be marked and void and no longer trying to payment

AMOUNT			INVOICE NUMBER
$10.00	USD	Void	88293F5-0010



Technology: Customer Relationship Management (CRM) and Team Management Software

Customer Relationship Management (CRM) Software

Maintaining communication with member patients before, during, and after the sync process keeps syncs on schedule and patients satisfied

A Customer Relationship Management (CRM) software provides a means to organize and track patient communication

CRM also may be leveraged to shift telephone communication to text message communication, improving clarity and efficiency

- **Case Example:** Good Shepherd Pharmacy uses Zipwhip

Zipwhip

What is zipwhip?

Zipwhip is a software program that allows us to send and receive text messages from our patients.

We use Zipwhip daily to keep in contact with our patients and to help us meet their needs faster.

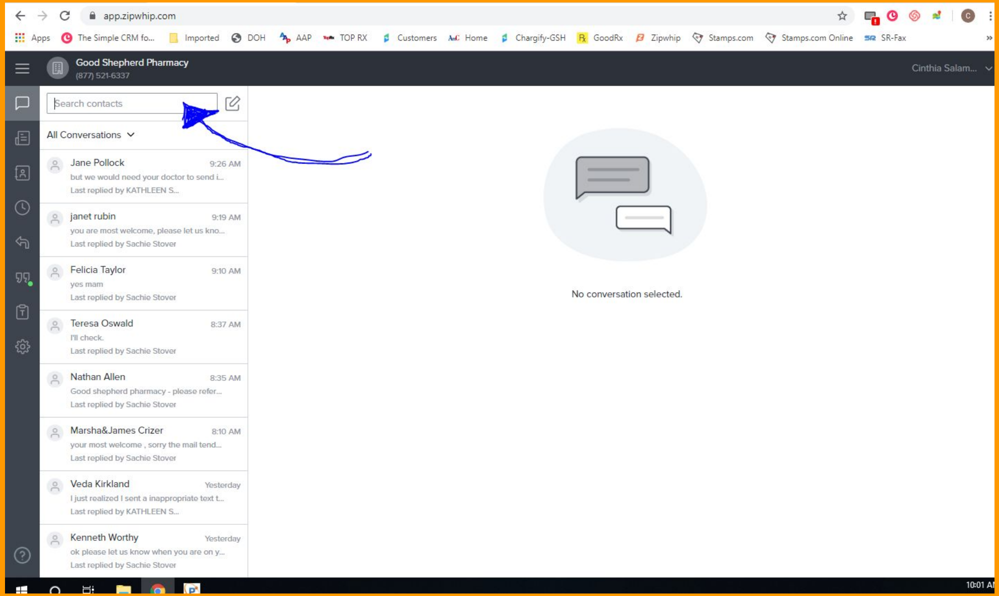
Most of our patients communicate with us through Zipwhip, however not all of our patients have the capability to text, so we do receive some phone calls from patients as well.

You will learn how to use Zipwhip in the following slides.

Sending a message

Sending a text message in zipwhip is very simple.

1. **Go to zipwhip.com and log in using your user name and password.**
2. **Click on the search icon in the top left corner.**
3. **Search for the patient's name and click on their contact information.**



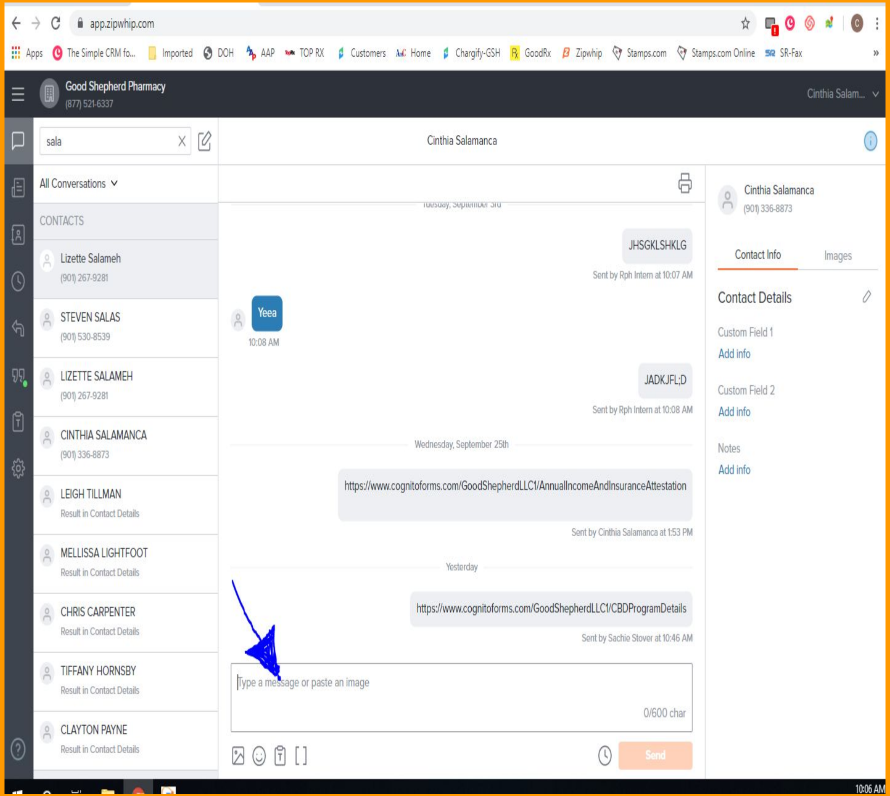
3. Once you have clicked on the correct contact your screen should look like this.

4. Type in the message you want to send to the patient.

5. Click the orange “send” button to send the message.

6. Refresh the web page after sending the message.

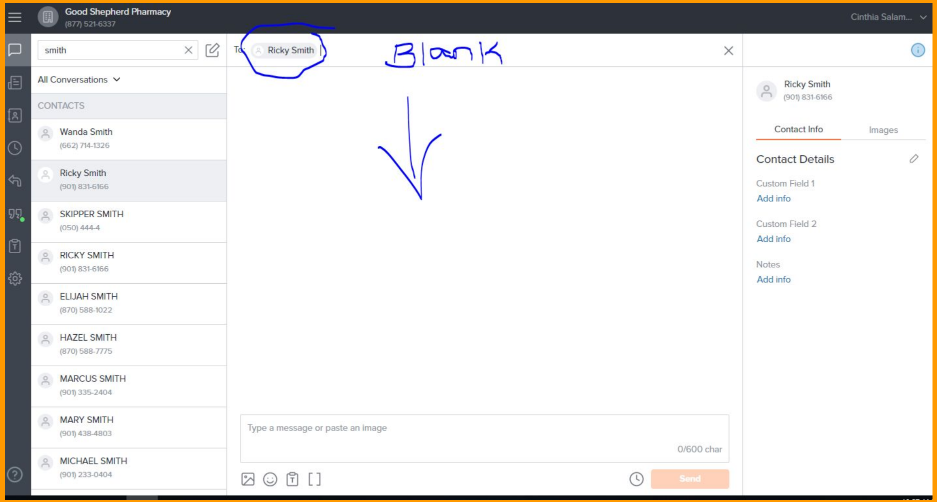
You will be taken back to the home screen. If you don’t refresh the web page, when the patient texts back, the message will be automatically read by the software program and it might be missed by gsh staff.



What to do if the message won’t send?

If you get an error message saying, “message won’t send,” then it is likely that the patient did not receive the text message.

If there are no previous text conversations in the Zip Whip program, then the patient probably does not have a texting service set up. You will need to call the patient instead of using Zip Whip.

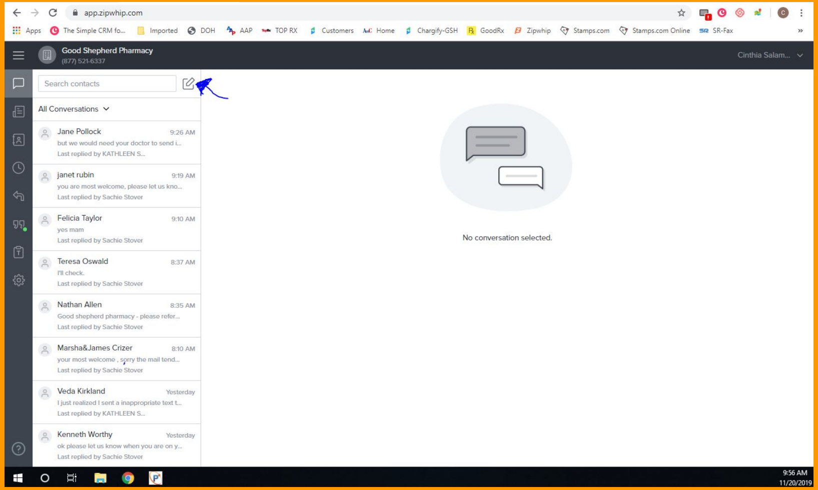


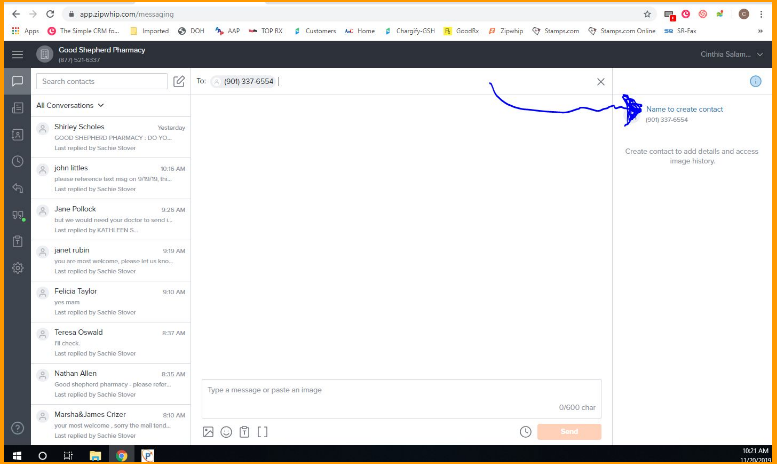
In the example to the right, there are no text messages listed for the patient Ricky Smith. He doesn't text!

Sometimes you will get a different message saying “sending error.” This means the patient blocked us or no longer receives text messages.

Entering a Contact

1. Once logged in you should be able to see the pencil and paper icon in the top left corner.
2. Type in the patient’s number on the right side bar.
3. In the right top corner you should see that it says “add to contact”
4. Please add the patient’s first and last name.
5. Then send your message and you are done!



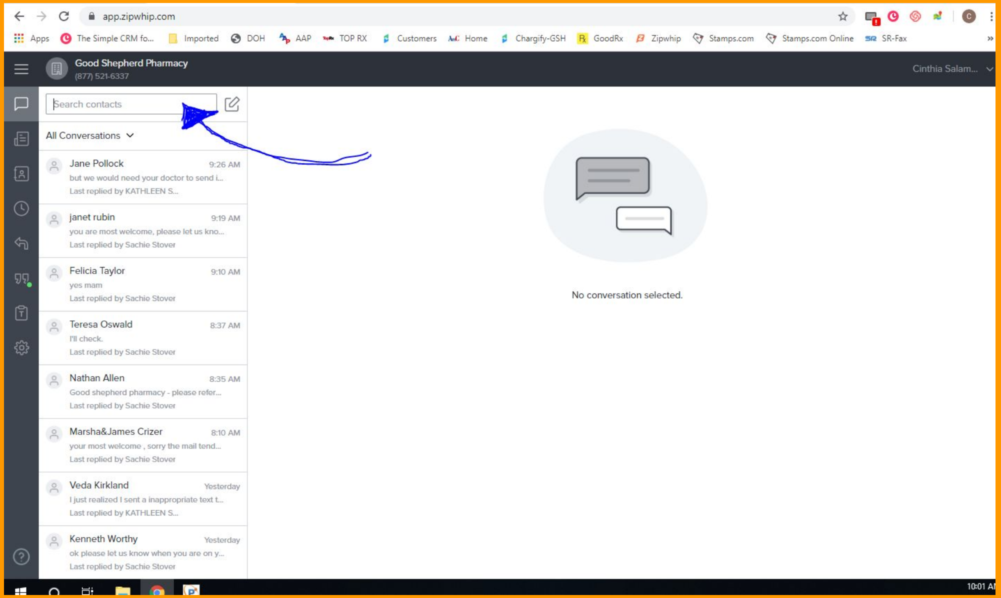


Contact Look-Up

The process for looking up a contact is similar to sending a message.

Click the top left corner bar where it says “Search contacts.”

You can search by the patient’s first or last name.



Autoresponders

What are autoresponders? Autoresponders are messages that we created from zipwhip to automatically respond to people who need our help.

Ex: If a patient texts the word “INSULIN” the autoresponder will reply with a link to a form for the patient to see if they qualify for insulin.

Ex: If they text the word “ SIGNUP” the autoresponder will send another link to fill out. Someone will contact that person to help them sign up over the phone.

Ex: If they text before or after work hours, during holidays, or because of bad weather, our patients will get an auto response that we are closed and will get back with them the next business day.

Helpful Hints

Make sure that you always remember to refresh the webpage in Zipwhip after sending a text message.

Make sure you do not read a text message from a patient and leave it marked “read” without responding to the patient. (If you accidentally read the message and you don’t know how to respond make a red task in Glip (our internal communication software program).

Pharmacy Team Communication Management

- The Membership Pharmacy Model can layer on top of a traditional pharmacy dispensing model
- However, running both pharmacy models simultaneously will add additional complexity to workflow
- A well-defined team communication strategy, including task-tracking is critical
  - **Case Example:** Good Shepherd Pharmacy uses Glip

GLIP TUTORIAL

1. What is Glip?
2. Task Colors
3. Task Creation
4. Task Editing and Completing
5. How to add a comment
6. How to search for a previous task

What is Glip?

- Glip is Good Shepherd Pharmacy’s primary method of communication. Through glip we track a wide variety of patient care related topics including communication with doctors, reminders regarding patient care, new sign-ups, phone calls/text messages, shipping and payment related tasks. We may also occasionally use it for problems that arise in the pharmacy that need attention.
- We call each of these categories listed above “tasks” and they are color coordinated.
- Now we will go through and get acquainted with each color and their appropriate protocols.

Blue task: Communicating with Doctors' Offices

These tasks are for communications with doctors offices. There are a wide variety of reasons we may need to contact a doctors office but we will list the most common reasons below.

1) We have received a prescription that was wrong, not clear or needs clarification. Ex: Doctor sends over a prescription that says Atorvastatin 40mg, take 2 tablets by mouth at bedtime, writes it for a qt of 90 and a day supply of 90. In this example, the qt on the prescription and directions and day supply do not match. We will make a task at this point and contact the doctor for clarification.
2) Drug interactions- One of the jobs within the pharmacy is catching drug interactions. This is the pharmacists job so they will occasionally make tasks to discuss these things with the prescribing doctor.
3) We no longer carry a particular medication but have a substitute medication that would work in its place. These tasks are typically done in bulk. Ex: we no longer get Symbicort that 25 of our patients are currently taking, therefore we make tasks for each of those patients individually, to request a switch to Spiriva. The doctor must approve and provide a new prescription for new medication.

-Protocols

1) In the examples above, we will make 3 attempts to call the doctor's office. After that, we will contact the patient and let them know that we were unsuccessful in our attempt to talk with their doctor and t they should contact their doctor at this point.
2) If we do get a response, instead of completing the task, we will change it to red for the next step.

Green Tasks: Waiting

-These tasks are typically waiting on something that is a good bit off in the future. Normally the patient has requested we wait until a certain day to get in touch with them again or a day we should start looking out for something.

Example: A patient states that they will not be going to the doctor until a certain day, but when they do they will be sending over a prescription that we do need to fill.

-Protocol

- Always assign a due date.
- Complete when resolved.

Yellow Task:(greenish gold color)

These task are for when patients membership, medication or ship cost past due.

Example: Stripe shows past due amount

We call and email patient to make arrangements

If patient calls or text back with arrangements make glip task or make note on existing task.

-Assign due date

- Complete when resolved

Purple tasks: New Sign Ups

These tasks are for new sign ups

-NOTE: You may make a task here but please notify Sachie our customer service rep before completing it.

Orange task: On Hold

-These tasks are things that are on hold. Unresolved issues that are not ready to be completed. You could think of these as reminders, holds or incompletes.

-A few examples

1) A patient has called to let us know that the doctor is sending over a prescription today or tomorrow and they want us to contact them back to let them know we did receive it.
2) We are waiting on a patient to mail us their prescriptions, so we know to look out for them and to notify patient when we have received it.

-Protocols

1) Complete when resolved.

Red Tasks: Urgent

-These tasks are the most important on Glip and should be looked at and treated as URGENT.

-These mainly consist of patients who have left voicemails or sent text messages that need to be responded to quickly.

-These also may consist of blue tasks that have now been switched to red. The protocol to switch blue tasks to red is because typically are pharmacists complete those tasks. A pharmacy technician needs to look over the resolution that was made to see if the patient's profile needs to be updated in any way or if the patient needs to be contacted.

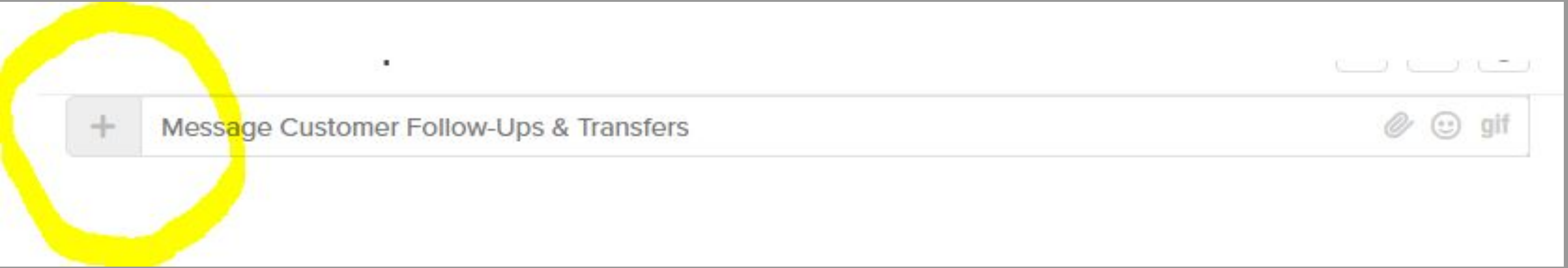
-Protocols

1) These tasks must be dealt with promptly.
2) No red task should remain when leaving for the day.
3) These tasks either need to be completed or assigned to another color as needed.

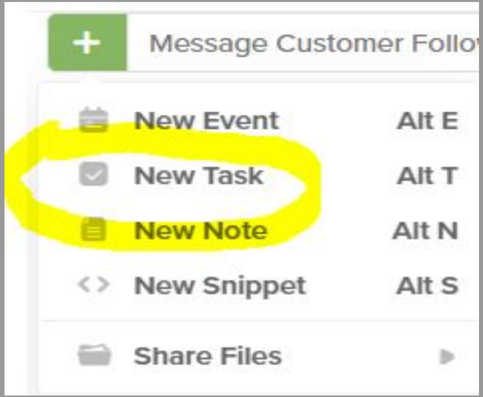
Creating a Task

-How to make a task

1) On the top of your screen you will see this. Click the “+” symbol.



2) Click “New Task”

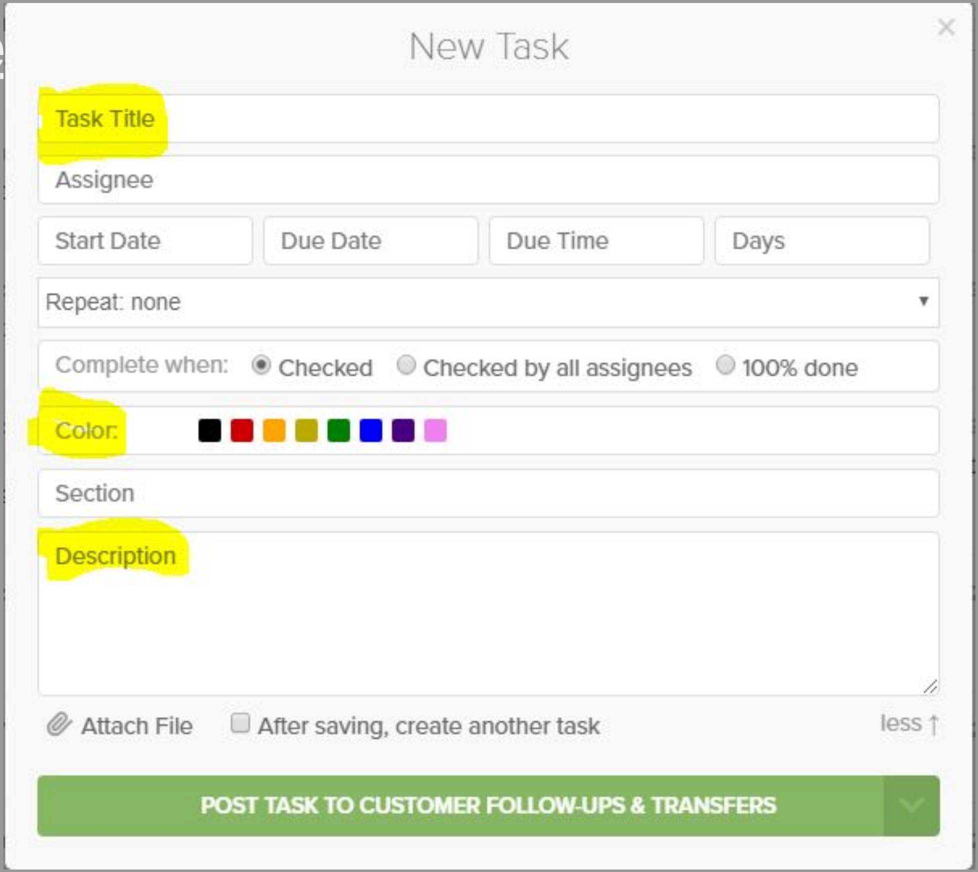


Creating a task-continue

- The highlighted items seen to the side are areas you MUST fill in.
- Task title is almost always the name of the patient.
- Pick the appropriate color
- Then add your detail..Think “why am I making this a task”

NOTE: if you are making a blue task, PLEASE include the patient's Date of Birth in parenthesis next to their name. Also put the doctors name and phone number in the description area.

- You may also add an assignee (a specific employee that needs to tend to this task) or a due date as appropriate.



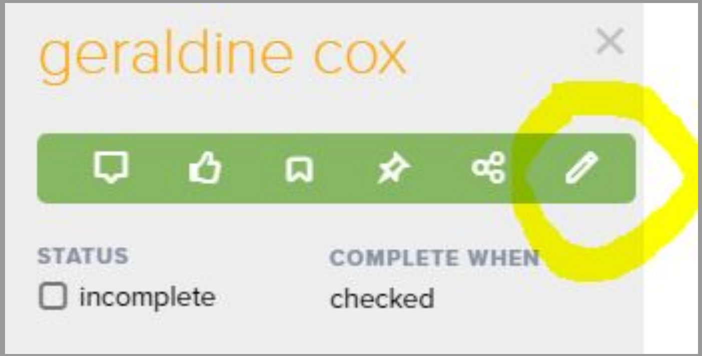
Completing a task

A task may be completed when ALL issues have been resolved. It is not out of the ordinary for a task to be created for one reason and then other issues arise later. It is also not uncommon for tasks to switch colors multiple times. Below you will see A) how to change a tasks color and B) how to complete a task.

A) Changing task Color----->

-Select the pencil looking icon and it will take you back to original “creating a task” screen.

- Then you can select the color you wish to change it too

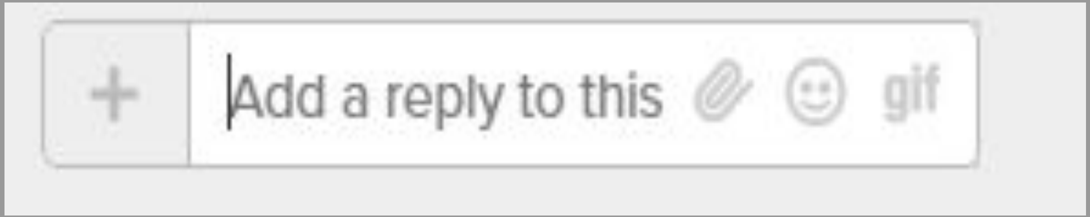


B) Completing a task------->

-To complete a task you will just check the box next to “incomplete” and it will change the task to complete.

How to add a comment

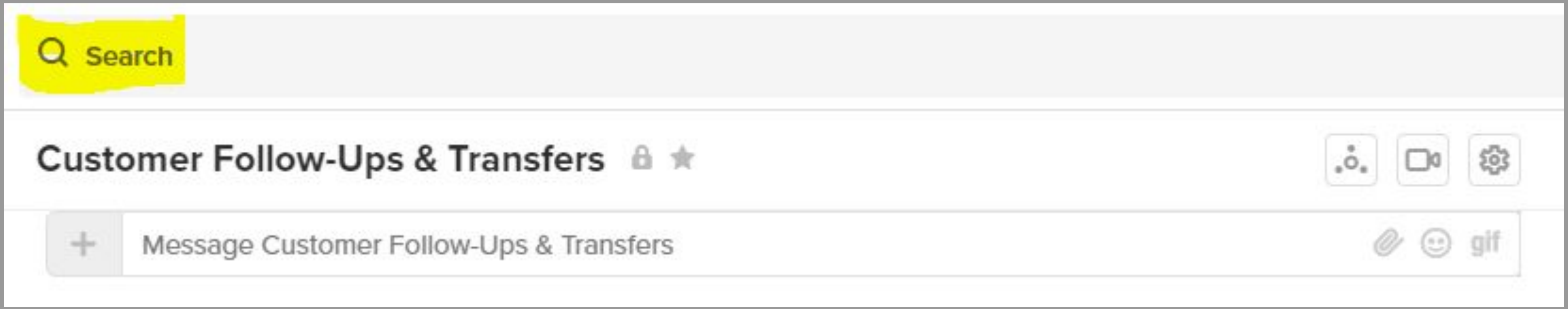
-When you click on a task, this box will appear at the bottom of it. You will type your comment and then hit “enter.”



How to search for a previous task

-One of the reasons Glip is SO important, is because its our tacker and back-up for almost everything. Because we can search Glip, we have a database that helps us see who called, what was done and resolutions from years past. This comes in hand DAILY. Lets go over a few examples that show off Glips usefulness.

1) A patient calls and says they requested their medications to be sent on April 14th. My first step would be to type the persons name (see below the search key found at the top of Glip). Hopefully I will see the patient's name show up and a task that has been completed in the pink section (shipping) on April 14th.
2) A patient calls wondering why they haven't received a certain medication. You may search glip and see that it was a medication that we no longer carry, that we contacted the doctor 3 times with no response and then left a voicemail on the patients phone (or sent them a text) to let them know.



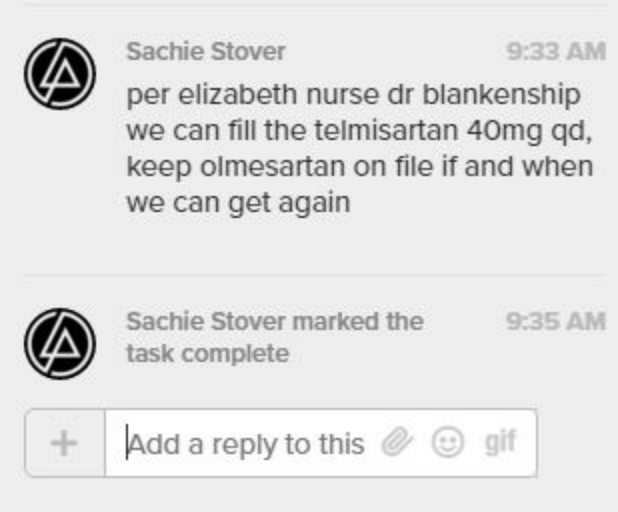
How to search for a previous task- continued

- In some cases we may want to reopen a previous a task. Again think of tasks as a database or text messages you have on your phone. We will sometimes scroll up through a text thread with someone on our phones to see what we were previously talking about to jog our memories. We do the same thing on Glip. And for this reason we want EVERYTHING documented. In the event a task was completed, but another problem arises that seems like the information in the “completed” task would be helpful to “jog our memory”, we will re-open the task and assign it to the person who completed it. See below.

First you will uncheck the box that says “complete”

Then you will assign the task in this scenario to Sachie.

REMEMBER: you will do that by editing the task (as if you were changing its color) and then typing Sachie's name in the “assign” part.



Shipping: Technology and Workflow

Selection of a Shipping Software

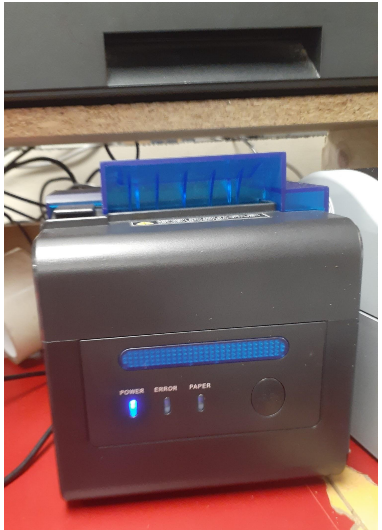
- Shipping synced medications can be a labor-intensive process
- A well-defined workflow and use of shipping technology can streamline shipping
- A variety of online shipping software options are available
  - **Case Example:** Good Shepherd Pharmacy uses Endicia®

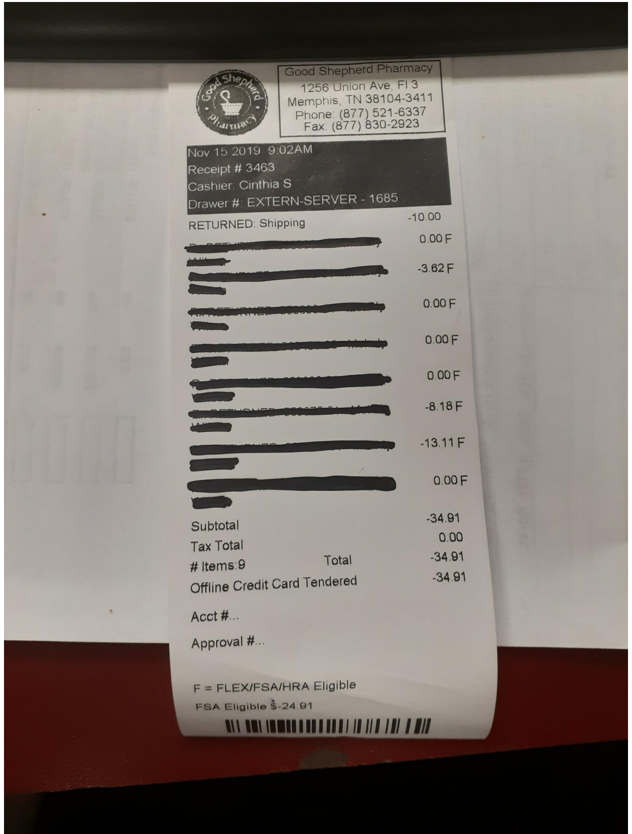
ENDICIA (Shipping) WORKFLOW

1. Scan the receipt you received from completing a point of sale
2. Match the customer’s address with the label
3. Weigh it: Boxes vs.Bag
4. >1 pound = priority <1 pound
5. Enter weight and round up
6. Click Print Label
7. Refunding a label
8. Reprinting a label
9. Apply Label
10. Checking Delivery status
11. Package lookup

What is a Receipt?

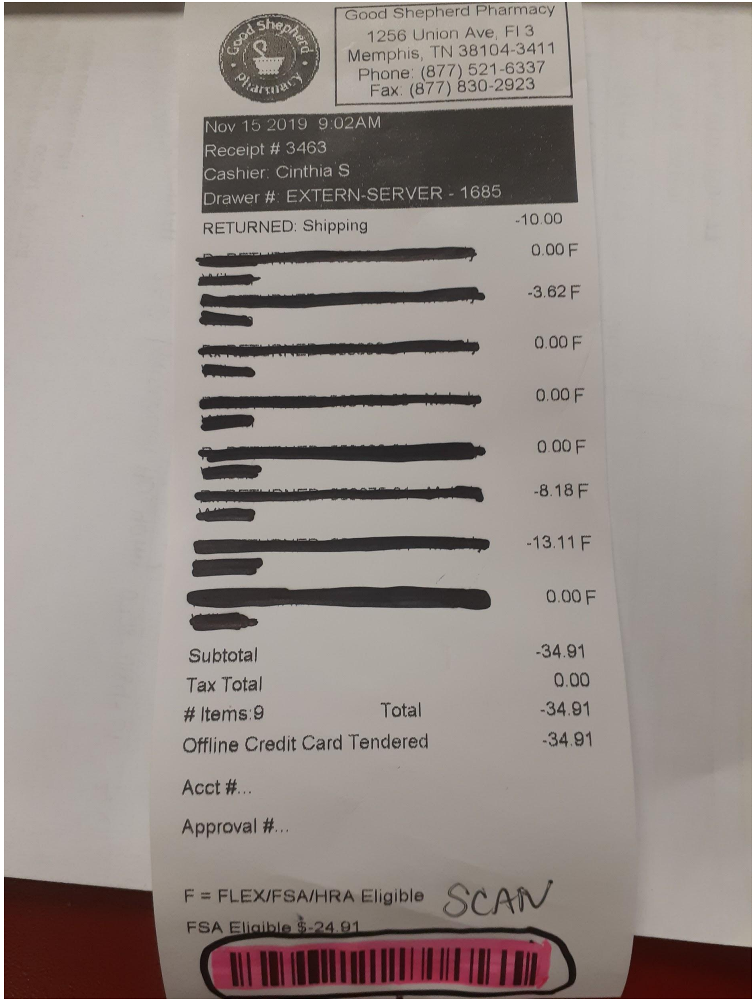
- A receipt is a piece of paper that prints automatically once a sale is completed through point of sale in the Pioneer Software. It will print from the printer shown below.
- You must complete point of sale in Pioneer before moving on to Endicia for shipping.
- To the right you will see what the receipt looks like.
- You will use this receipt to complete shipping through Endicia.





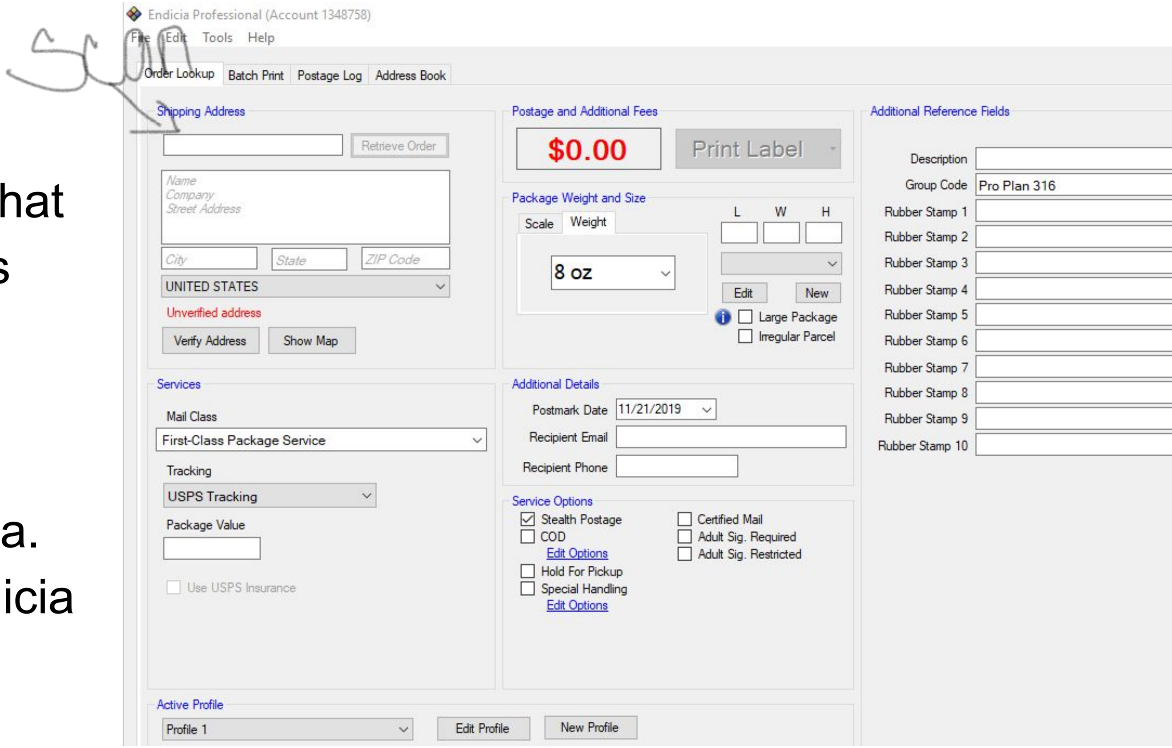
Locate the Bar Code

- The picture to the right shows the barcode highlighted in pink at the bottom of the receipt.
- You will need to scan the barcode into the search bar in endicia in the next slide/step.



Scan the receipt

1. Log in to endicia.
2. Scan your receipt (the paper that prints when the point of sale is completed).
3. Once receipt is scanned the patients' information should automatically pop up in Endicia.
4. Make sure the address in Endicia matches the address on the receipt.

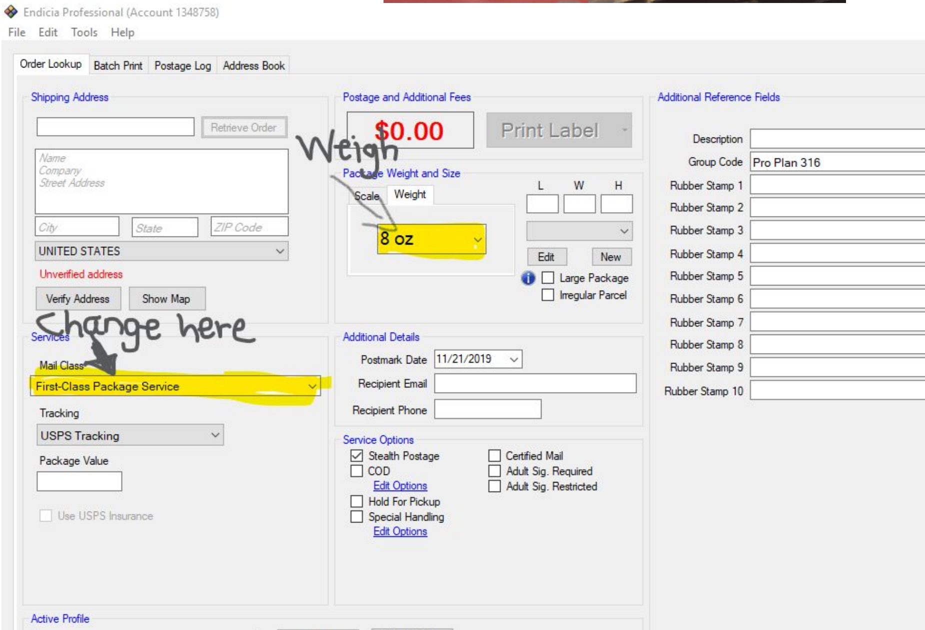


Weigh your package

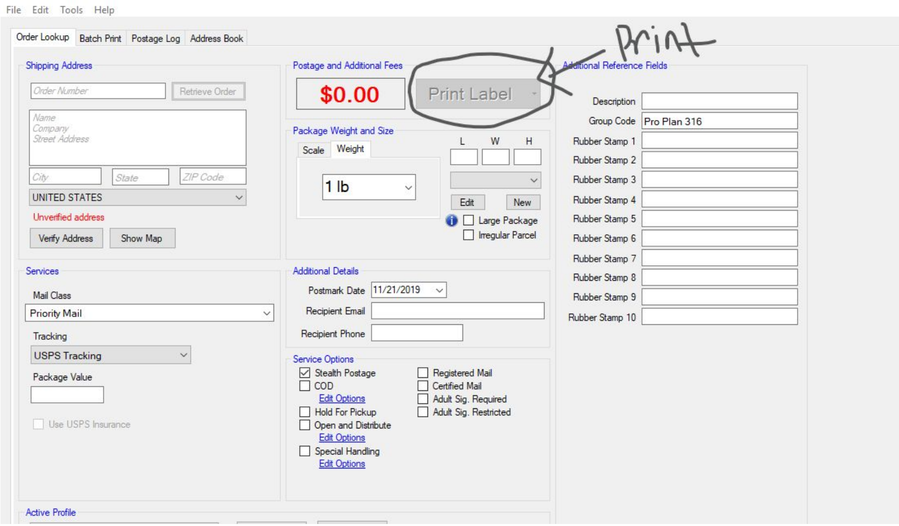
Place your package on the scale and type the weight amount into Endicia. Always round up. For example: If the package weighed 6.4oz you will enter 7oz in Endicia).

If the package is more than 1lb (pound) you will need to change the mail class to priority.

*HINT: Anything that weighs more than 1LB should be shipped as priority mail. If it's under 1lb it should be shipped under first-class package service.



Click print label



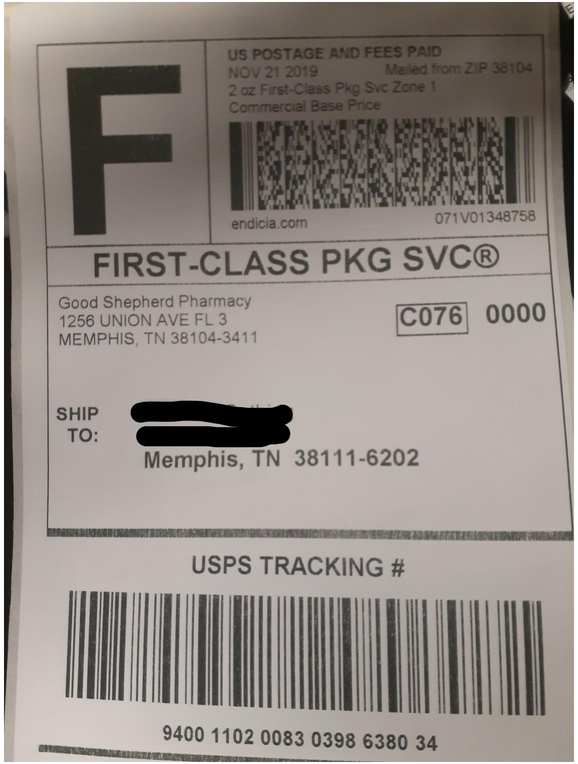
Once all previous steps are completed you may now click the "print label" button.

Your shipping label should of print in the shipping printer.

Place the label on the box

Place the shipping label on to the package. To the right you will see an example of what the shipping label looks like.

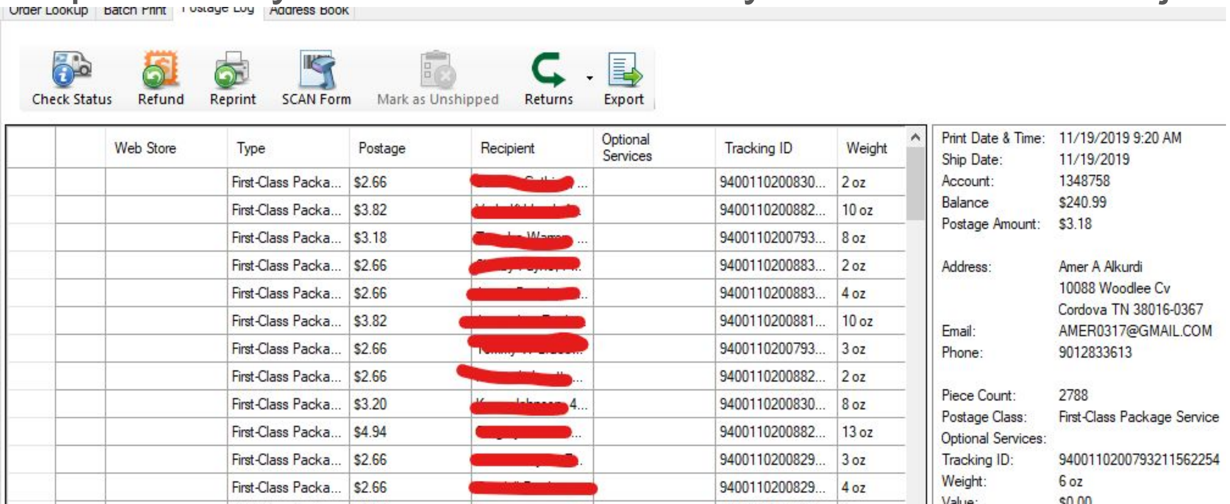
Make sure you put the label on the box/bag as straight as possible to prevent issues with the post office when they scan the label.



When you are done place package into the postal bin!

Refunding and Reprinting a label

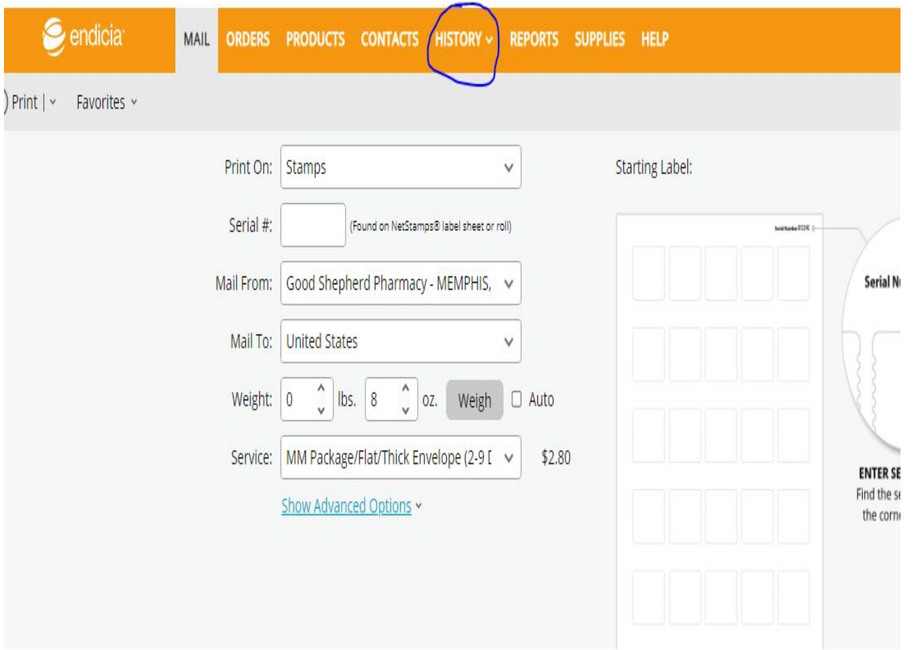
1. You will click on the endicia icon ------------>
2. Once you are on the app on the top left corner you will click on “postage log”
3. Then,you will click on whatever patient you want to return/reprint
4. After clicking on the patient on the top left corner you will see the options refund/reprint and you click on whatever you want to do and just press “OK”



PACKAGE LOOKUP/STATUS

1. Go to print.endicia.com and log in.
2. Once you are logged in, on the top in the middle click “history” then “search print history”

3. Once you are on the print history on the left side you will see date printed options...Example “past 7 days, “past 3 months” etc.you click whatever option you need .



Package lookup/ status

1. After you click on whatever option you needed you will see these options.It has the dates shipment status,tracking # etc
2. You can see all the information that you will need.. You could also just copy tracking # and look up on google too