



StarWellness

Training Guide

Improve Patient Health, Star Ratings & Your Bottom Line



Instructions

Congratulations on your decision to incorporate our StarWellness solutions to start your pharmacy on the path to improved patient health and improved workflow. StarWellness is designed to simplify the steps necessary to enroll patients in various adherence programs.

This software makes it easier to:

- Identify the Patients that Qualify
- Recruit those Patients to Participate
- Enroll them in the Appropriate Program
- Schedule Calls, Fills and Pick-ups
- Sustain and Grow the Patient Base Through Automation

This Guide Includes

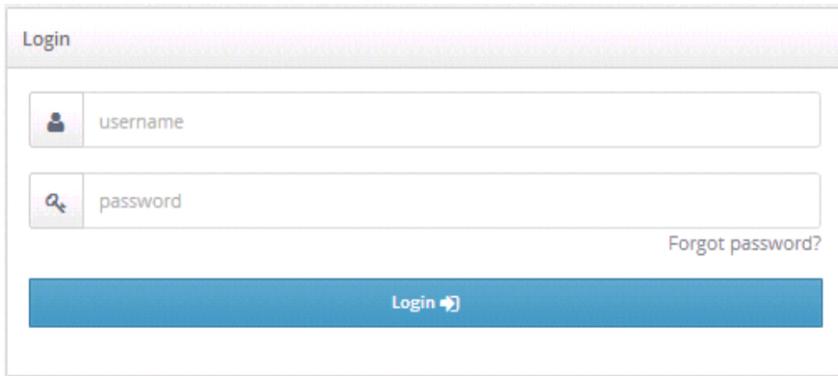
- **Log-in Screen**
- **LinkWellness Dashboard Overview**
 - Control Panel
 - Star Ratings Measurements
 - Patient Demographics
 - Patient Engagement
 - Pharmacy Performance
- **StarWellness - Patient Enrollment Process**
 - Open Record
 - Confirm Meds to be Included
 - Confirm Anchor Med and Appointment Date
 - Confirm Communication Preferences
 - Fax – Print Options
 - Enroll Button
 - Deselect
- **Calendar**
 - Fill and Pickup Date
- **Patient Communication Options**
 - Recruiting Script
 - Confirm Script
 - Reminder Script
 - Will Call Bin Scripts
 - Birthday Communication
 - Customer Loyalty
- **Frequently Asked Questions**

Log-in Screen

To access your log in screen go to www.prescribewellness.com
In the upper right-hand corner you will find a **sign-in** button.

Click **sign-in** and it will take you to secure log-in screen

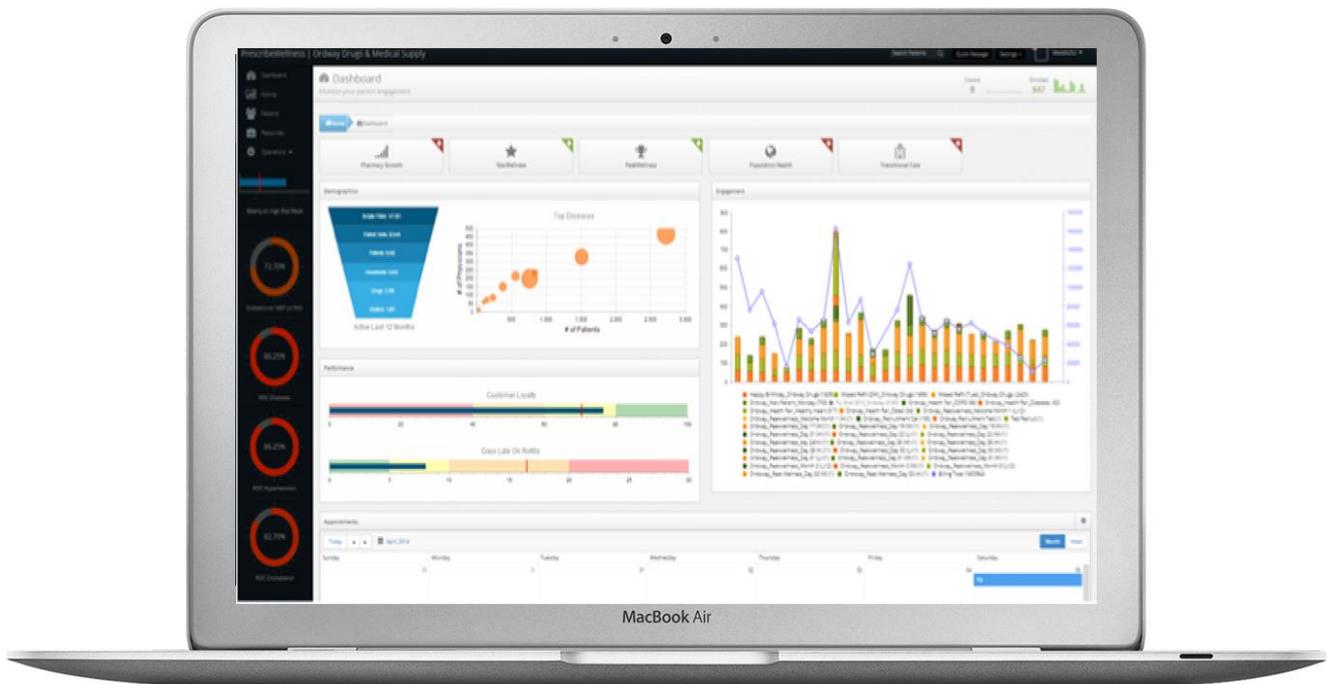
Your user name is always your e-mail address. Each employee of the pharmacy must have a separate e-mail address and password to access the LinkWellness Dashboard. Remember the software includes PHI information and you must log out when not in use. Your password should be protected.



The screenshot shows a login form with the following elements:

- A header labeled "Login".
- A text input field with a user icon and the placeholder text "username".
- A text input field with a key icon and the placeholder text "password".
- A link labeled "Forgot password?" located to the right of the password field.
- A large blue button labeled "Login" with a right-pointing arrow.

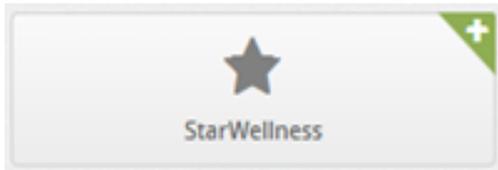
Once logged in you will be taken directly to your LinkWellness Dashboard



LinkWellness Dashboard Overview

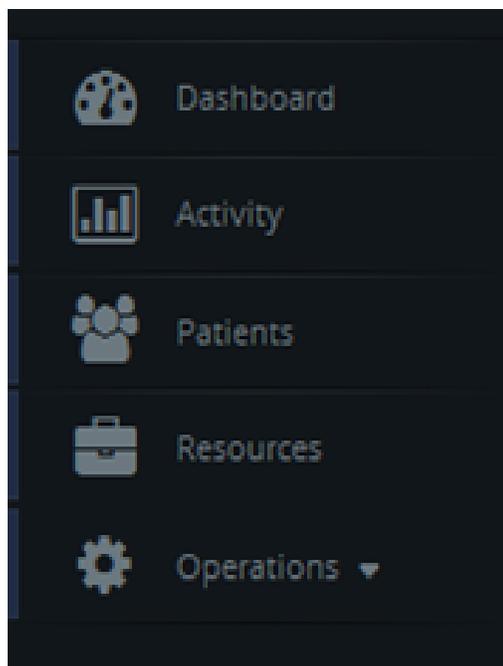
The LinkWellness Dashboard is designed to give you greater insight into your patient population, your pharmacy performance (in driving patient health and safety) as well as your bottom line. The Dashboard is your one-stop for growing your pharmacy, delivering adherence solutions, offering chronic disease management services, expanding your population health initiatives and/or collaborating with local hospitals and other professionals along the continuum of care.

Across the top center of the screen are the various programs available through the dashboard. Pharmacy Growth, StarWellness, PeakWellness, Population Health and Transitional Care.



StarWellness Program.

Control Panel



You will see the tabs to enter other screens including:

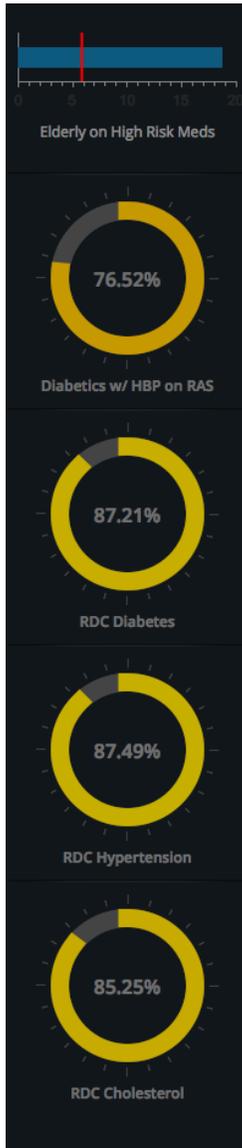
Activity- Detail of the patient communications delivered in the last 72 hours and those scheduled to be delivered today

Patients- Your patient search & segmentation tool for all patients active in your pharmacy over the last 12 months

Resources- Materials to help you implement clinical services in your pharmacy

Operations- This tab takes you to two key functions; management of your no-call list and execution of on-demand calls

LinkWellness Dashboard Overview



Star Ratings Measurements

Continuing down the left hand column, you will see 5 patient measures. These measures are the Part D Star Ratings that pharmacy has the greatest opportunity to influence. The measures are categorized as safety and adherence measures:

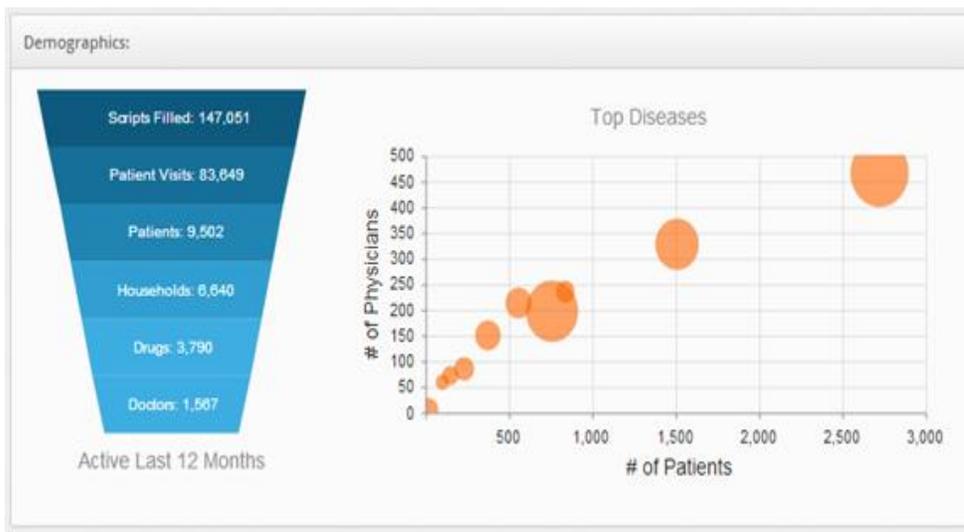
Safety Measurements

- 1) The percentage of your elderly patients on high risk medications as defined by the CMS Star ratings
- 2) The % of Diabetic patients with hypertension on an ACEI or ARB

Adherence Measurements

- 3) Medication adherence of your diabetic patients as measured by the Refill Days Covered (RDC)
- 4) Adherence of your patients on hypertension medications
- 5) Adherence of your patients on cholesterol medications

Note RDC differs from PDC. It is based on all patients, not selected plans. It starts with the last refill completed in your pharmacy and has a minimum of two fills for the same EPC.

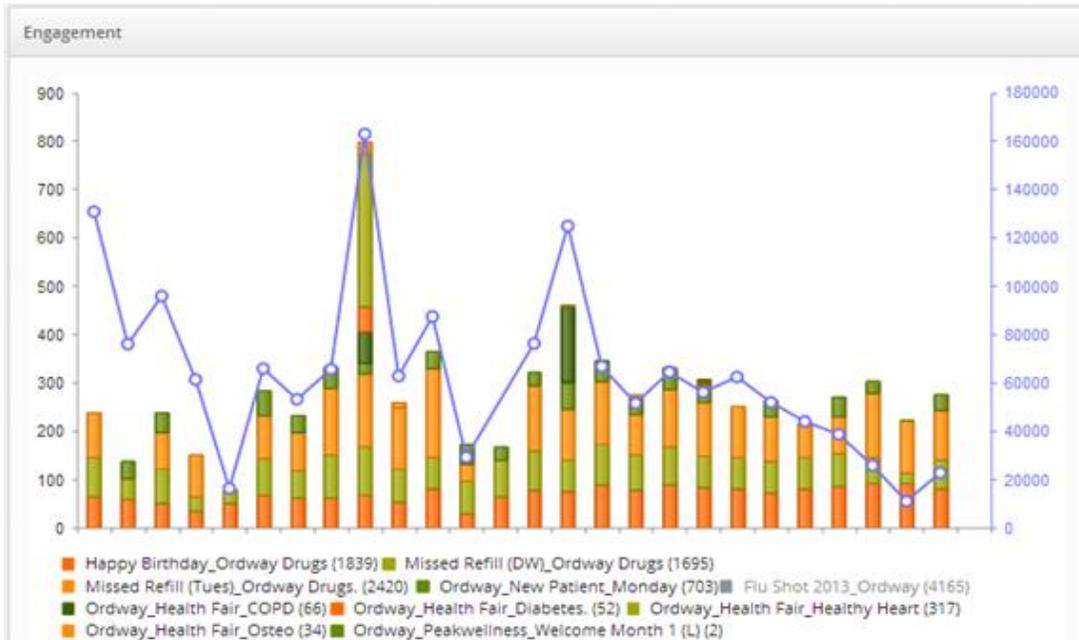


Patient Demographics

A snapshot of patient by disease state, doctor, medication, households, fills and spend.

LinkWellness Dashboard Overview

Patient Engagement- An overview of the patient communications that are going out by week and associated revenue within 7 days of communication.



Pharmacy Performance – A look at how your pharmacy compares in service to maintenance med patients in two key areas; loyalty and frequency.

Loyalty is based on the % of maintenance med patients that did business in your pharmacy in the past 12 months that are still doing business with you today.

Frequency is the average days late on refill or maintenance meds. Example 16.5 means avg. 30 day fill is being completed day 46.



StarWellness Patient Enrollment

Open Record

From your Dashboard Home page, select **StartWellness** to open the **Manage Patients in adherence programs** options.

The screenshot shows the StarWellness Patient Enrollment dashboard. At the top, there is a navigation bar with 'Home' and 'Dashboard' buttons. Below this are five main menu items: 'Pharmacy Growth', 'StarWellness', 'PeakWellness', 'Population Health', and 'Transitional Care'. The 'StarWellness' menu item is highlighted with a green plus sign. Below the menu items is a 'Programs' section with a 'Medication Reconciliation' tab selected. This tab displays a table of patient records. The first record is for a patient with ID 'A*****', phone number '8313723864', and 3 maintenance meds. The enrollment status is 'Enrolled', the date enrolled is '04/03/2014', and the pickup date is '06/07/2014'. Below this table is the 'Appt-Based Medications' section, which includes a date selector for '6/7/2014' and checkboxes for 'CALL', 'SMS', and 'EMAIL'. A table of medications is displayed with columns for 'Is Synched', 'Pick Up Date', 'Name', 'Rx Number', 'Billed Price', 'Co Pay', 'Rx Date', 'Refills Remaining', 'Next Pickup', 'Days Supply', and 'Shortfill'. Three medications are listed: Risperidone 1 mg/1, Citalopram 40 mg/1, and Trazodone Hydrochloride 50 mg/1. All three are marked as 'true' for 'Is Synched'. The 'Enroll' button is visible at the bottom right of the medication table.

Patient	Phone	Maintenance Meds	Enrollment Status	Date Enrolled	Pick Up Date	Allow Call	Allow SMS	Allow Email	Actions
A*****	8313723864	3	Enrolled	04/03/2014	06/07/2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UnEnroll

Is Synched	Pick Up Date	Name	Rx Number	Billed Price	Co Pay	Rx Date	Refills Remaining	Next Pickup	Days Supply	Shortfill
<input checked="" type="checkbox"/>	true	Risperidone 1 mg/1 (68382-0114)	8449418	\$458.51	\$16.70	12/09/2013	2	06/07/2014	90	0
<input checked="" type="checkbox"/>	true	Citalopram 40 mg/1 (65162-0054)	8419087	\$95.61	\$5.00	12/20/2013	1	04/19/2014	30	19
<input checked="" type="checkbox"/>	true	Trazodone Hydrochloride 50 mg/1 (50111-0433)	8419112	\$21.95	\$5.00	12/20/2013	1	04/19/2014	30	19

Select the **Medication Reconciliation** tab to access your list of all qualified patients. You can use the **filter** options to narrow down your search.

Once you've identified your patients, click the **arrow** option to populate your **Appointment Based Medications (ABM)** tab patient med list.

Confirm Meds to be Included

The ABM Tab allows the pharmacist to select the medications that will be reconciled to the same pickup dates. In the example below the pharmacist has selected 4 medications and identified the number of short-fill days that will be required to reconcile the pickup date.

StarWellness Patient Enrollment

Appt-Based Medications

Recommend syncing medications on 4/13/2014 

CALL SMS EMAIL

	Is Synched	Name	Rx Number	Billed Price ▼	Co Pay	Rx Date	Refills Remaining	Next Pickup	Days Supply	Shortfill	Actions
<input type="checkbox"/>	false	Saphris 10 mg/1 (00052-2142)	8462215	\$463.19	\$3.60	02/12/2014	1	04/13/2014 	30	0	
<input type="checkbox"/>	false	Sertraline Hydrochloride 100 mg/1 (59762-4910)	8462213	\$187.01	\$1.20	02/12/2014	1	04/13/2014 	30	0	
<input checked="" type="checkbox"/>	false	Bupropion Hydrochloride 150 mg/1 (00591-3331)	8462212	\$180.26	\$1.20	02/12/2014	1	04/13/2014 	30	0	
<input type="checkbox"/>	false	Omeprazole 20 mg/1 (62175-0118)	8436402	\$119.32	\$1.20	01/10/2014	8	04/10/2014 	30	3	
<input checked="" type="checkbox"/>	false	Sucralfate 1 g/1 (00591-0780)	8450683	\$78.21	\$1.20	04/01/2014	10	05/01/2014 	30	12	
<input checked="" type="checkbox"/>	false	Propranolol Hydrochloride 20 mg/1 (23155-0111)	8470642	\$30.76	\$1.20	03/28/2014	0	04/27/2014 	30	16	
<input checked="" type="checkbox"/>	false	Omeprazole 20 mg/1 (60505-0065)	8436402	\$22.80	\$1.20	04/01/2014	7	05/01/2014 	30	12	

Confirm Anchor Med and Appointment Date

The program is designed to auto select the lowest short fill as the anchor med (highlighted in blue). The pharmacist has the option to change the anchor med by simply changing the **Recommend syncing medications on date** and reset the preferred Appointment Date.

Confirm Communication Preferences

Each patient will have the option to select their preferred channel of communication(s). Simply check the corresponding channel box (Call, SMS, Email) to apply communication preference.

Fax – Print Option

In order to fill the necessary short fill days, a prescription from the prescribing physician is required. This function has been automated for the program. Selecting the “**Fax/Print**” button will provide the pharmacist the option to Preview/Print/Fax the list of medications that are selected.

StarWellness Patient Enrollment

Short Fill Faxes List ×				
Physician: Robert Travis Martin Phone: (831)-796-1700		Preview Print Fax		
Medication / Strength	Days Supply	ReFills Remaining	Next ReFill Date	Short Fill Days
Bupropion Hydrochloride 150 mg/1 (00591-3331)	30	1	04/13/2014	0

Physician: Patricia S Lee-Bennings Phone: (408)-847-1166		Preview Print Fax		
Medication / Strength	Days Supply	ReFills Remaining	Next ReFill Date	Short Fill Days
Sucralfate 1 g/1 (00591-0780)	30	10	05/01/2014	12
Omeprazole 20 mg/1 (60505-0065)	30	7	05/01/2014	12

Physician: Kamal N. Arora Phone: (949)-451-1789		Preview Print Fax		
Medication / Strength	Days Supply	ReFills Remaining	Next ReFill Date	Short Fill Days
Propranolol Hydrochloride 20 mg/1 (23155-0111)	30	0	04/27/2014	16

The Short Fill Faxes List details the prescribing physician associated with each medication. The contact information, telephone and fax, are sourced from the NPI database for accuracy and completeness.

From the “Preview” button you are able to see the exact fax that is being sent to the prescribing physician. Prior to program launch, when your account is activated, the pharmacists will have the ability to edit the content on this preview for any message/prescription customizations.

StarWellness Patient Enrollment

Short Fill Fax

X

A Sample Pharmacy
95 Argonaut
Suite 210
Aliso Viejo, CA 92656
Tel: 800-960-8147
Fax: 866-308-1313

FAX

To: [Redacted] From: A Sample Pharmacy

Fax: (408)-847-3045 Pages: 2

Phone: (408)-847-1166 Date: 4/9/2014

Re: Patient Request for Medication Synchronization

CONFIDENTIALITY NOTICE: This facsimile and any accompanying data or files are confidential and may contain privileged information intended only for the named recipient(s). If you are not the intended recipient(s), you are hereby notified that the dissemination, distribution, and or copying of this message is strictly prohibited. If you receive this message in error, or are not the named recipient(s), please notify the sender at the phone number above, and destroy or return the materials to the sender at the above address.

PAGE 2

Our mutual patient, A*****, D***, [Redacted] has enrolled in our pharmacy's Simplify My Meds program, a coordinated refill service that synchronizes all of the patient's prescriptions to be refilled on the same day each month.

The program helps patients be more adherent to their medications by ensuring they refill their prescriptions on time during a single trip to the pharmacy. It also eliminates last-minute phone calls to your office for refills or prior authorizations.

To start this patient on the program, a short-fill prescription is necessary for the medications listed below. **Please provide us with a new prescription for the quantity outlined below.**

If you have any questions, please contact me at the pharmacy. Thank you.

Medication / Strength	Days Supply	ReFills Remaining	Next Refill Date	Short Fill Days
Sucralfate 1 g/1 (00591-0780)	30	10	05/01/2014	12
Omeprazole 20 mg/1 (60505-0065)	30	7	05/01/2014	12

Send

Print

After the fax has been reviewed or edited the pharmacist has the ability from this screen to either send the Short Fill Fax direct by fax to the prescribing physician by selecting the **“Send”** button, or the pharmacists can print the fax for later manual submission or as a paper record by selecting the **“Print”** button.

The preview is not required to print or fax the refill request. The refill request can be printed or faxed at any time from the Short Fill Fax List by selecting the **“Print”** or **“Fax”** Button.

Enroll Button

This digital service is designed to improve your patient's adherence, loyalty and health. After you select **Enroll**, you will receive a confirmation of patient enrollment. Your patient information will automatically be added to your **Appointments** calendar

StarWellness Patient Enrollment

Enroll Button

NCPA 2013 National Report Card on adherence discovered that the number one factor for adherence is the relationship between the patient and their pharmacist. By selecting **Enroll**, a patient is opting in to receive timely, relevant communications from the pharmacist to drive loyalty, adherence and improve patient health. After you select **Enroll**, you will receive a confirmation notification. To validate enrollment, reference the Enrolment Status column in the Medication Reconciliation tab.

Medication Reconciliation												
	Patient	Phone	Birth Date	Maintenance Meds	Enrollment Status	Date Enrolled	Pick Up Date	Allow Call	Allow SMS	Allow Email	Actions	
▶	S*****, A***	8313750869	01/08/1942	3	Declined	04/08/2014	05/01/2014	✘	✘	✘		
▶	S*****, F****	8316491393	01/20/1949	4	Enrolled	04/08/2014	04/24/2014	✔	✔	✔	UnEnroll	
▶	L****, L*** D**	8316494149	09/26/1950	4			04/13/2014	?	?	?	Decline	
▶	T*****, R**** W. I**	8313200479	04/22/1942	3	UnEnrolled		04/27/2014	✔	✔	✔		

Deselect

To **UnEnroll** a Patient, reference the Actions column in the Medication Reconciliation tab and select **UnEnroll**. To confirm, reference the Enrollment Status column.

LinkWellness Dashboard Overview

Calendar

Your patient will be added to the Calendar. Two dates will be published: fill date and pickup date. Fill date is auto set 5 days prior to the pickup date. Pickup date is the date the appointment is scheduled with the client and medications are due to be picked up. The Appointment-Based Medication digital program will schedule a *Confirmation* call to the patient 7 days prior to and an additional *Reminder* call to the patient 1 day prior to pickup date.

The screenshot shows a calendar interface titled "Appointments" for the month of April 2014. The calendar grid displays dates from Sunday, April 30 to Sunday, May 05. Blue bars labeled "Fill" are scheduled for April 05, 06, and 13. Red bars labeled "Pickup" are scheduled for April 10, 11, and 18. The interface includes navigation controls for "Today", "April, 2014", and view options for "Month" and "Week".

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	31	01	02	03	04	05	05
06	07	08	09	10	11	12	12
13	14	15	16	17	18	19	19
20	21	22	23	24	25	26	26
27	28	29	30	01	02	03	03

Select either option for a detailed screenshot of a list of patients including medications to be filled or scheduled to be picked up. Click the **Print** option to print document or to preview and manage the patients list on screen.

The screenshot shows a window titled "Events on 04/07/2014" with a close button (X). It displays "1 Patient(s) for today". The patient information is: Patient: A***** , G***** (J****) 12/02/1933 8316574282. The medications listed are: Seroquel 50 mg/1 (00310-0280), Seroquel 200 mg/1 (00310-0282), Namenda 10 mg/1 (00456-3210), and Ramipril 5 mg/1 (16252-0572). A "Print" button is located at the bottom of the window.

Events on 04/07/2014

1 Patient(s) for today

Patient: A***** , G***** (J****) 12/02/1933 8316574282

Medications:
Seroquel 50 mg/1 (00310-0280)
Seroquel 200 mg/1 (00310-0282)
Namenda 10 mg/1 (00456-3210)
Ramipril 5 mg/1 (16252-0572)

Print

Patient Communication Options



Recruiting

All Patient on 3 or more Medications

Hello, this is [Name] your pharmacist here at [Pharmacy Name]. I'm calling you to announce a new program here at the pharmacy. This program is designed to assist you on taking your medications as directed, decrease the risk of unnecessary complications from non-adherence, and improve your overall health and quality of life. We are always looking for ways to help our patients stay healthy. There is no cost to the program and it takes only a few minutes to enroll. Please call me at [Phone] or ask us about "simplify my meds" in your next visit. The pharmacy number is [Phone]. I look forward to hearing from you. Have a great day!



Confirm

7 Days Prior to Due Date: Live Press 1 Message

Hi this is [Name] your pharmacist here at [Pharmacy Name]. I am calling to check in. We are getting ready to complete your medications for your appointment next week so I wanted to ask if you have been to the doctor or hospital in the past month. If you have or if you have had any changes in your prescriptions please press #1 now to connected back to the pharmacy or call me back at [Phone]. I look forward to seeing you. Have a great day.

7 Days Prior to Due Date: Machine Message

Hi this is [Name] your pharmacist here at [Pharmacy Name]. I am calling to check in. We are getting ready to complete your medications for your appointment next week so I wanted to ask if you have been to the doctor or hospital in the past month. If you have or if you have had any changes in your perceptions please call me directly at [Phone]. I look forward to seeing you. Have a great day.

Patient Communication Options



Reminder

1 Days Prior to Due Date: Tuesday - Friday Appointments

Hi this is [Name] your pharmacist here at [Pharmacy Name]. I am calling to give you a quick reminder of your appointment tomorrow. Take a moment and write down any questions you have about your medication, I want to make sure I answer all your questions. If for any reason you can't make it tomorrow PLEASE give me a call at [Phone]. Taking your medication as prescribed is a key to better health. I'm looking forward to seeing you. Have a great day.

1 Days Prior to Due Date: Monday Appointments

Hi this is [Name] your pharmacist here at [Pharmacy Name]. I am calling to give you a quick reminder of your appointment Monday. Take a moment and write down any questions you have about your medication, I want to make sure I answer all your questions. If for any reason you can't make it Monday PLEASE give me a call at [Phone]. Taking your medication as prescribed is a key to better health. I'm looking forward to seeing you. Have a great day.



Will Call Bin Reminder

OnDemand Campaign

Hi this is [Name], at [Pharmacy Name]. I am calling to remind you to pick up your prescriptions. If you have any questions please call me at [Phone]. Have a great day!



Happy Birthday

Automated Daily

Hi this is [Name], The staff at [Pharmacy Name] would like to be one of the first to wish you a Happy Birthday! If you need any assistance, please call me at [Phone]. We look forward to serving you for many more birthdays in the future.



Customer Loyalty

Automated, New Patient or 6 Months since Last Visit

Hi, this is [Name] calling from [Pharmacy]. I wanted to call you personally to let you know we at [Pharmacy Name] appreciate you as a customer. We know you have options when selecting pharmacies and wanted to say thank you for choosing [Pharmacy Name] to meet all of your needs. If you have questions, please feel free to call me at [Phone]. We hope you have a terrific day!

Recording Instructions



Detailed recording instructions will be emailed to you. Instructions will include a toll free number along with your unique username and a secure password.

Please note your name, title and phone number are required on the recording. When recording the script, be relaxed with a conversational pace and tone. Imagine calling a friend about an important matter. Speak clearly into the phone and re-record as many times as you would like if you are not satisfied. To improve your overall listening rates, messages are designed to not exceed 45 seconds. If you have any questions or require additional assistance, please contact our client support team.

Frequently Asked Questions

Q: How do I view patients that are not enrolled in the program?

A: The StarWellness tab provides options for the patients to be sorted by enrolled, unenrolled, declined status.

Q: What if I want to anchor all the medications on a date that is not a next pick up date?

A: Simply use the calendar tab on the medication screen and choose a date.

Q: How do I sync two different groups of medications on two different dates?

A: The software supports one pickup date per patient

Q: What if the medications do not have the same day supply? How do I sync these medications?

A: The system will calculate shortfills across the 30, 60 and 90 day supply, you will have to remember that the 60 day supply should be filled every other appointment and the 90 day supply every third appointment.

Q: For adherence, if a diabetic patient with hypertension is not on an ACEI/ARB, can I use the program to fax a request to the doctor?

A: Yes, the content on the fax can be modified.

Q: Will the system pull out customers who are in a group home/nursing home?

A: Based on your pharmacy management system, group home/nursing home patients will be excluded.

Q: Will the system allow us to record messages in the voice of our pharmacist(s)?

A: Yes, 5 different pre-recorded messages in the pharmacist's voice are included.

Q: Will the system allow us to determine the originating phone number?

A: Communications will be delivered with a unique phone number that you designate, return calls are handled like any other inbound call to your pharmacy.

Q: Is the PrescribeWellness services agreement for just 9 months (length of the study) or is it longer?

A: NCPA is sponsoring the pilot for 9 months, there is no obligation to continue using PrescribeWellness services after that period.

Frequently Asked Questions

Q: Can the patient opt out of receiving messages?

A: Yes, the Dashboard allows you the flexibility to opt patients out of the program or just out of receiving communications.

Q: How does the patient opt out?

A: To opt out of the program, press the unenroll button on the far right of the patient summary tab under StarWellness screen. To opt out of receiving calls or text simply uncheck the channel next to the patient name on the Star tab

Q: Does the system just make phone calls? Can it send text messages as well?

A: The platform supports voice, text and e-mail. Voice and text can be used for this program.

Q: Will the system allow me to select who is recruited for appointment-based medication delivery and who isn't?

A: Yes, simply export the target list and use internally or for the recruitment call

Q: Who has access to my data?

A: Data is transferred via a HIPAA compliant and secure method to your Dashboard. All data resides behind a firewall and is never stored locally. It will be visible to your PrescribeWellness support staff as necessary.

Q: Will NCPA, APA, or PrescribeWellness use my data in any other way?

A: NCPA, APA, and PrescribeWellness will not use or sell your data for any other purpose. Non-PHI data will be used to measure the impact of the appointment-based medication delivery on medication adherence and potentially other outcomes. The data will be gathered by PrescribeWellness and sent to the University of Arkansas Medical Sciences who was selected by NCPA and APA to be the research partner for this study.

Q: Will NCPA, APA, or PrescribeWellness sell my data to someone else to see or use?

A: No, data is used only as expressly agreed upon in NCPA pledge and PW services agreement

Frequently Asked Questions

Q: Does PrescribeWellness adhere to all of the requirements of the HIPAA and HITECH acts?

A: Yes, PW uses the latest technologies to ensure security and business practices to ensure compliance to all applicable state and federal regulations. The communications should be used only as presented in the user guide.

Q: Why is TeamViewer used? Is it required?

A: PW establishes a secure integration to the pharmacy dispensing systems through the TeamViewer application. It is used for training, support and for certain pharmacy management systems nightly extraction and transfer of data.

Q: Why do you need a remote user name & password for my pharmacy system? Is it required?

A: The software is designed for ease of use. The program is designed to improve productivity and efficiency. To eliminate double entry of patient information a nightly feed of data from the pharmacy management system is accomplished through the pharmacy management system access.

Q: I haven't heard of PrescribeWellness. What do they do?

A: Founded in 2010, PrescribeWellness is dedicated to expanding the role of community pharmacy in America. The Company currently has pharmacy customers in 46 states. Learn more at www.prescribewellness.com

Q: I thought PrescribeWellness was in the outbound calling and digital communication space. Will I have access to those tools as well?

A: PrescribeWellness platform delivers pharmacist to patient communications in voice, text and e-mail. A campaign library includes over 22,000 messages. Five (5) key messages as described in the training guide will be utilized in the pilot.