

This document with go through all the steps needed to have a care plan be automatically added when administering any vaccine.

First step is creating the care goal template.

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Here is a currently list of all the vaccines I have added. I created a copy from the flu vaccine as my template, then changed it to fit what immunization I needed. I plan to add Covid-19 vaccine in there as well. To add Covid-19 vaccine, I will copy the Shingrix template and adjust the date for the second shot to equal what is recommended (either 21 or 28 days). See Shingrix example for more information. I will be creating 2 care plans to differentiate 21 vs 28-day interval. Note, I have copied all system care goals, so I am able to edit them and change information to fit what we want to accomplish at our pharmacy. Without doing this, you will not be able to do this setup properly. Make sure to "deactivate" the system level care goal so you do not confuse yourself when you are setting this up.

After you have added each vaccine you want to include, you will then need to create a category with the correct immunization.



System  $\rightarrow$  Category  $\rightarrow$  Search "Rx Item"

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Jardiance	ny brand Rx item equivalent to Jardiance	System	Inactive	
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Loyalty Generic Non \$10		Auto	Active	
Menactra	Anginococcal	Auto	Active	
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PC: 24		Manual	Active	Opioid pledge and pt
PC: 31	C 31	Manual	Active	handout
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Pneumo 19-64	neumo 19-04	Auto	Active	data sharing agreement
Pneumovax shot		Manual	Active	v v
	Matt Wlodyga logged on to Chet Johnso	on Drugs, Inc.		

As you can see here, I created another flu shot drug category, so this portion is editable. I have added one for Flu, TDaP, Shingrix, Meningococcal, etc. I will add a Covid-19 one as well with the specific manufacture (Moderna Covid-19 vaccine). Once we do receive the vaccine, I will add in the appropriate NDC information to be linked to the care plan.

After creating a Rx item, you will need to add the corresponding vaccine to the Rx item.

ltem Catego <u>C</u> ategory:	pry: Flu shot Flu shot		8/50	Owner:	Use	er					
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Click add, change filter to Equivalent and type in NDC of flu vaccine (see next page for example). If you link up all your flu vaccines for a set year, then you do not need to add any additional NDCs. We do not do this, so I have added all NDCs that we used since the start of December. If you miss an NDC and you run a claim for a flu shot, this will not automatically create a care plan. You must enter all NDCs for this to work properly.



Filter: Equivalent ~		×
Equivalent: AFLURIA QUAD 2020-21 (3YF -	quivalent ~	
	AFLURIA QUAD 2020-21 (3YF 👻	
Save - F12 Cancel - ESC	Save - F12 Can	cel - ESC

After you have done this with all your different vaccines you will be providing, the next step is to link this to the care goal to have this process be automated.

MTM  $\rightarrow$  Rx Trigger

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PioneerRx	Rx Workflow I	Patient Third Party Account Sale It	tem Inventory Ordering Analysis MTM	Location System			🔞 Sm	gle Logoff 🥏 🌻 🌜 🚍 • 😨 •
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1 1-	Diabetes Patient - Nee	Diabetes Patient - Needs Statin in Addition to Lifest.	Every Fill of Medication	On Meds that Can Treat.	Stations		No	Rx Edit Reject
	Opiate - Review Thera	Opiate therapy needs to be reviewed for appropriat.	Every Fill of Medication		Opiate Agonists or Partial.		No	Cycle Fills
	Pneumococcal Vaccine	Recommend and administer pneumococcal vaccine	<ol> <li>Every Fill of Medication</li> </ol>	Pneumococcal Vaccine (			No	Denied Excepts
	Shingrix Vaccine	Adds the Shingrix Vaccine Care Goal to patients ide	<ol> <li>Every Fill of Medication</li> </ol>	Shingrix Vaccine (Age > 5			No	Denied Escripts
	Hepatitis C 12 Week S.	Add the Hepatitis C Care Goal to patients with a firs	<ul> <li>First Fill of Medication</li> </ul>		Sofosbuvir/Velpatasvir (AG)		No	Failed Kenewals
	Direct (AngelHx)	Initial Opioid profile review for AngelFix foundation	First Fill of Px		Opioid		No	Incomplete Care Actions
	DUR - Critical Drug Int.	Drug Utilization Review Trigger for identified Critical	Every Fill of Medication				No	Medication Sync Calls
	HRM in Heart Failure	High Risk Medication in Heart Failure	First Fill of Rx	Heart Failure	Potentially High Risk Drug.		No	Receive Invoices
	DUR - Third Party Rej	Drug Utilization Review NCPDP reject code 88, wh.	- Every Fill of Medication				No	0.10
	PDMP check	PDMP check with care plan. Need to do every 3 m.	First Fill of Medication		Opiate Agonists or Partial.		Yes	RX EDIT
	Annual Flu Vaccine	Annual Flu Vaccination	Every Fill of Medication		Flu shot		Yes	
	Shingrix Vaccine	Shingrix	First Fill of Rx		Shingrix shot		Yes	
	Uprovd Medge and ha.	Provide opioid predge and handout to acute opioid	First Fill of Medication		Oprate Agonists or Partial.		Yes	Alerts +
	HPV Vaccine age 3-14	Gardani-9	First Fill of Medication		Gardasil-9		Tes	Alerts (0) 😵
	Meningococcal Vaccine	Menactra	Every Fill of Medication		Menactra		Yes	
	TDaP Vaccine	Boostrix	Every Fill of Medication		TDAP shot		Yes	
	Care Points - Spiriva R.	Applies medication education opportunity for patient	t. First Fill of Medication	Previous History of Spiriv	Spiriva Respimat 2.5 mcg		Yes	
								Task list 3
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Once again, I have replaced the system level triggers with editable ones and then made sure to set the active status to "no".

Create a trigger by clicking "add" in the upper right-hand side.

E JOHNS	<u>(UC</u>			
T Amery, Wisco	onsin			
Edit Rx Trigger		23		
Name:	Annual Flu Vaccine		► Na	me Rx trigger
Description:	Annual Flu Vaccination	^	Cł Tł ev	nange to every fill of medication. his will create a new care goal very year a patient comes into the
Status:	Every Fill of Medication		pł	narmacy for a shot. For multiple
Туре:	Care Goal ~		sh Co	ot vaccines such as Shingrix or ovid-19, this should "first fill of
Trigger Item:	Annual Flu Vaccine		m	edication"
Event Type: Categories	Rx Change		-	This box is your corresponding
Patient: =	<any> ~ Flu shot ~</any>			care goal you want to have automatically triggered on the patient's profile.
Compound: =	<any></any>			
Prescriber: =	<any></any>			This will create a care goal on
Third Party:	<any> ~</any>			claim is billed through
Facility: =	<any> ~</any>			insurance.
Active: Yes V	Save & Close - F12 ▼	Cancel - ESC		This is your corresponding Rx item.

Saving and close. You have completed all the steps needed to create an automatic trigger. When processing a flu shot the care plan will be created and shown on the patient's profile under the MTM tab when the claim is processed. You can see the care goal if you go under incomplete care actions queue in "To Do lists". As seen below, we currently have 1 care goal that needs to be submitted to CPESN. This can be done as a daily task during the night or during down times in the pharmacy.

## **Rx** filters

This is a very important field when creating care plans. It will default as shown below. It is important to have an action with a create new. Without this step, a care plan would not be created. This can also be used in multiple ways. I am still learning on how to properly use with category. I will provide an update if I do change how I am using this in the future.



Care Go	al Rx Trigge	er Filt	ter												23
	🕢 Move Up 🔮 Move Down 🜵 Add 🗙 Delete									🕻 Delete					
	Care Goal Status Typ	l De	Medication		Success Scope		Success		Time		Time Amount	Action		Set Status To	
•	Open	•	Any	•	Any	•	Any	•	Any	-		Append Rx	-	Do Not Change	-
	Closed	-	Any	•	Any	•	Any	•	Any	•		Append Rx	•	Do Not Change	-
	Any	-	Any	-	Any	•	Any	•	Any	-		Create New	-	Do Not Change	-
														Save - F12 Cancel -	ESC

E & A B B B C A C	Search for Care Actions	- * *
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MTM Search for Care Actions	Addens + Jeois + Search + Reports + Anabas + 🔂 + Job	
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And the first 100 months of the set	A REAL PLAN AND A DESCRIPTION OF A DESCR	Priority Fill Requests
Assigned toCost /Cost		Rejected Claims for Third Party Orifical External MTM Rx Edit Reject Cycle Fills
E Assigned To : Methew Johnson (1 item)		Denied Escripts
III. Assigned To : Nicole Sheldon (1 item)		Failed Renewals
E Assigned To : Pharmaciet (23 items)		Incomplete Care Actions
Coal: Administer Shingrix Series (Veccine 1 and 2) (25 items)		Medication Sync Calls
K. Coal: CUMIENT & Vectors (Litert)     K. Coal: CUMIENT Set Vectors and Calent Set Management (Clamp)		Receive Invoices
# Coal : FUS Introduction - Education and Patient Self Management (5 items)		Ra fidit
III Coal: FU9 Hispertension - Education and Patient Self Management (18 items)		
# Goal : Hypertension - Education and Patient Self Management (154 Jams)		
I Goel Indicator: Needs Additoral Medicator Therapy (1 item)		
# Coal : Intel Opiate Therapy Review and PDMP check (29 items)		erts IDI
III Goal : Inital Provided Opicial Pledge and Opicial Hendour to Patient (80 items)		
# Goel : Initel3 Hypertension - Education and Patient Self Management (13 items)		
E Goal : Nationone Use for Opioid Overdose Precaution - Copy (1 item)		
E Coel: Opiate Therapy Review and PDMP check (8) items)		
K Goel: Piror Authorization - KArmodatini (250mg> (1 tem)		
<ul> <li>Goel : Pror/adhonzeton - Quecepern bmg2 (1 tem)</li> </ul>		
Cost : ther Authorization - Clarida 1.2 Cramp (1 mm)		
Cost : Intributionsation - Cubocame or a Factor (Linem)     K. Cost : Disc Automation - Cubocame (ICL 20 Jahr) (Linem)		
E Coal - Discription - Costantino Company (Trans)	Tai	elist 4
II Grail Dear Autorization - Clinete (190ex) (1 deal		y Tasks (15) 🔗 📍
# Goal - Proc Authorization - Calla (Omain) autoiniectory (1 dem)	• • • • • • • • • • • • • • • • • • •	utcome Pts
# Goel: Prior Authorization - <transatol 50mg=""> (1 item)</transatol>		sp Flavors
# Goal - Prior Authorization	P	education
# Goal : Provided Opicial Pleage and Opicial Handout to Patient (53 items)	•	verside PIN
	a	in the second
		UPDATED COVID-19
Di contra c	اد	IOTOCOL II
	Scardt - F12 Quar Canad - ESC Id	cas 🗸
	Matt Woodyga logged on to Chet Johnson Drags, Inc.	

Now for more advance features within care plans. Please note, this is what we have developed at Chet Johnson Drug as our way of handling care plans within workflow; please adapt this do fit your pharmacy needs.

To keep this short, I am going to only bullet point important information and will provide pictures if needed.

- We assign all care plans to pharmacist once it is needed to be completed. As you can see in the most recent picture above. All immunizations and other information are present for the pharmacist to submit.
- We also use this feature for opioid scripts. We have our pledge and PDMP check automatically populate when a pt is filling an opioid for the first time. This helps us know who we need to do a care plan on.



Amery, Wisconsin

- Please note, If you run a test claim for an immunization, you will NEED to delete the care plan as it will automatically trigger.
- When copying a system level care goal, make sure to change the appropriate information to fit • your needs.

Edit Action Tem	plate			
Action:	Administer Flu Vaccine			
Short Name:	AnnualFluVax	12/25		
General Ins	structions Notes			
Intervention	n:	73701000119109 - Influenza vaccination given v 🛛 Catalogue Catalo		
Start Date:		Current Date v Plus v 0 Days v Editable v		
Days to Co	mplete:	0 Days Editable ~		
Method:		In Pharmacy V Editable V Required	$\sim$	
Target		Patient V Required	$\sim$	
Assigned T	Fo:	Restricted v		
Options:				
Action Corr	npletion:	Editable V Not Required V		
Action Des	cription:	Editable ~		
Short Nam	ne:	Not Editable ~		
Instructions	S:	Not Editable ~		
Require No	otes:	No v		
Allow Dele	te:	Yes v		
Editable Co	ompletion:	Yes V		
Require Du	uration:	No v		
Include in (	Care Coordination Note:	No V		
Delete - F2			Save & Close -	F12   Cancel - ESC

If you compare this to the system level care goal, I changed "intervention code" which is just the most appropriate SNOMED code we use, changed "days to complete" to zero (this will allow the care plan to be seen right away in the "incomplete care action" queue. As stated above, assigned this to pharmacist.

For multiple shot vaccines things are more complicated. For the first shot, we keep everything ٠ the same as the flu shot. The second shot care goal has the following changed: days to



compete set as when second shot is due such as 60 days for Shingrix, Assigned to "everyone".

Edit Action Template		
Action: Administer Shingrix Vaccine	#2	
Short Name: ShingrixVax2	12/25	
General Instructions Notes		
Instructions Notes		
Intervention:	105941000119105 - Herpes zoster vaccination given V C Editable V	
Start Date:	Current Date v Plus v Days v Editable v	
Days to Complete:	60 Days Editable ~	
Method:	In Pharmacy V Editable V Required	~
Target	Patient ~ Editable ~ Required	~
Assigned To:	Everyone V	
Options:		
Action Completion:	Editable V Not Required V	
Action Description:	Editable ~	
Short Name:	Not Editable V	
Instructions:	Not Editable ~	
Require Notes:	No ~	
Allow Delete:	Yes ~	
Editable Completion:	Yes ~	
Require Duration:	No v	
Include in Care Coordination Note:	No ~	
Delete - F2		Save & Close - F12   Cancel - ESC

We keep this care plan assigned to everyone so after 60 days this care plan will automatically pop up in "incomplete care action" queue. We use this as our reminder that the patient is due for the second shot and will call them letting them know. When the patient comes into the pharmacy for their second shot, this will be changed to pharmacist once completed.



To my surprise, we have 47 patients who are due for their second Shingrix shot.

One last tip...

We wanted to be as proactive as possible when we started doing care plans. One limitation we had is how do you manage who needs a care plan and who does not. What we have done with our HTN and chronic opioid patients is create a future care plan when it is do. For example, Our HTN care plans are set up to have a due date of 75 days from the date the care plan is created. This means we will provide the patient the set of HTN questions about every 3 months. Using this process, we were able to create a cleaner more systematic approach.

Courtesy of Chet Johnson Drug

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