Coach's Guide: Introductory Change Package

Checklist for October 2022

☐ Flip the Pharmacy (FtP) and Appointment-Based Model (ABM) Orientation [video](#) is a resource to review. This was provided to the FtP Pharmacy Candidate with the initial assessment.

☐ Review the FtP Social Media and Blog Toolkit: Click [here](#) to download word doc.

☐ Call/Email the Pharmacy to set up site visit at least 2 weeks prior to the visit.

- Pharmacy Champion should plan for at least 1 hour to visit with FtP Coach.

☐ Prepare for your site visit by reviewing the Pharmacy's Initial Assessment Results (view on page 2) and start completing the Initial Coach Assessment for each pharmacy.

☐ Click [here](#) to view the FtP Cohort 4 Introductory Change Package.

- Discuss the Test eCare Plan with the pharmacy.

☐ Inform pharmacies of Workflows Webinars.

- Click [here](#) to view a recording (7:30 min) about the series and how it's useful.
  - Please share with pharmacy staff.
- Encourage pharmacies to sign up for webinars and social learning communities.
  - Link to register for different sessions [here](#) or scan QR code

Initial Pharmacy Self-Assessment

- FtP Pharmacy should have already completed this
- Review the Cohort 4 Pharmacy's Assessment Responses (3 options for reviewing)
    1. Click here to view and download the responses as of 10/6/2022.
        - Alphabetized in order of State and then pharmacy.
    2. Upon contacting the pharmacy to set up the initial site visit, ask the pharmacy to forward the email they received with the results (PDF Format)
    3. Ask your Team Lead to forward you the email with the pharmacy's responses (PDF Format)

FtP Practice Transformation Coach Assessment

- Intended to help guide the site visit with the pharmacy and for the Coach to use as reference for each visit
    - May add more questions if helpful but this is a good start
- Complete an assessment form for each pharmacy
    - Click here to download the word document which includes the content within the next 2 pages
    - Should not take longer than 1 hour total to complete (includes prior to and during site visit)
- The questions without an asterisk on page 1 are intended to be completed prior to the site visit
    - Questions with asterisks are to be completed during site visit
- Page 2 helps with the Coach's review of the completed pharmacy initial assessment.
    - Review each domain's questions and determine the strengths, weaknesses, and opportunities for improvement or any barriers based on the responses
        - This will help you get acclimated to the pharmacy prior to your first site visit and then you can add to your comments in this chart during/after your site visit
    - Intended to help the Coach identify opportunities to help the FtP Pharmacy transform their practice and to identify how the Coach can be a resource to the Pharmacy.
- Set SMART Goals (specific, measurable, achievable, relevant, time-based) in addition to the eCare Plan requirements
    - Short-term (for next site visit) and long-term (end of the first progression)

Reviewing the Test eCare Plan with the Pharmacy

- View this video (starting at 9:08) to understand how the test eCare Plan can be viewed in the CPESN Collaboration Site by the pharmacy. Pharmacy Collaboration Site Guide for pharmacies.
    - Step 1: Pharmacy Staff Member logs in to the CPESN Collaboration Site
    - Step 2: Click on the Pharmacy Name
    - Step 3: Scroll down to "Care Plans Received Through...."
    - Step 4: View Care Plans received by CPESN USA – click the "Test Care Plan" column until an orange tab "sample" is at the top (usually have to click twice).
        - If a sample does not appear:
            a) The pharmacy has not submitted a test eCare Plan
            b) The pharmacy did not include the demographic information exactly as stated in the introductory change package
    - Step 5: Click the care plan confirmation number so that you can click "download the PDF document"

Flip the Pharmacy (FtP) Practice Transformation Coach Assessment
Questions to be completed during site visit

Initial Site Visit Date & Time: _____

Name of Pharmacy: _____

Pharmacy Champion Name: _____

Contact Info: _____

Best Communication Method: _____

eCare Plan Vendor: _____

*Number of Prescriptions/Week: _____

Number of Patients Enrolled in Med Sync: _____

*Percent of patients/prescriptions in Med Sync: _____

*Staffing Resources:

      a. Number of pharmacy technicians? _____   b. Number of Overlap of technicians? _____

      c. Number of Pharmacists? _____   d. Number of Overlap of Pharmacists? _____

*Does the Pharmacy have any questions about the FtP Initiative, structure of the program, or the roles of the Coach and the Pharmacy? Yes / No

*Does the Pharmacy know what the eCare Plan is and its purpose? Yes / No

*Did the Pharmacy have any problems with submitting the test eCare Plan? Yes / No | *If yes, describe the problem.* **(Review the test eCare plan submission with the pharmacy champion)**

*Has the pharmacy identified pharmacy staff members to attend the Workflow Webinars Series. registered for the Workflow Webinars Series?

Coach Notes:
Next Site Visit Date & Time: _____

	Strengths	Weaknesses	Opportunities for Improvement and/or Barriers
DOMAIN 1 *Leveraging the Appointment-Based Model*			
DOMAIN 2 *Improving patient follow-up and monitoring*			
DOMAIN 3 *Developing new roles for non-pharmacist support staff*			
DOMAIN 4 *Optimizing the utilization of technology and eCare Plans*			
DOMAIN 5 *Establishing working relationships with other care team members*			
DOMAIN 6 *Developing the business model and expressing value*			
Goals (between now and next month's site visit)	1. 2. 3.		

FtP Coach Tips from Lindsey Ludwig (Practice Transformation Coach and Team Lead for Iowa)

1. **Be encouraging:** Many sites will feel like they are not doing things right or not doing things good enough. Praise them for making changes/improvements, even if small baby steps. Also let them know they are not alone in this and other individuals have the same challenges they do.

2. **Be a resource:** These sites are busy enough just getting through the day to day work. In the beginning especially, I was often asked by the sites if I could find them examples of policies, CE or therapeutic resources to refresh staff, describe workflow at other locations, law questions, etc. I know the pharmacists could have probably found this info on their own, but having me put together a short email with a couple resources that answered their question or need seemed to really help. I even occasionally get an email for an off the wall community pharmacy question that is not specific to FtP, but they see me as an "expert" that can assist them or save them time searching. I don't always have the answer, but usually can find someone who does.

3. **Be flexible, but still hold them accountable:** eCare Plan Documentation is hard in the beginning and sometimes other things take precedence, but help them find the motivation or solutions to do better the next month and the next month. Using a "health coaching" approach that many may be familiar with could work well – ask them to set SMART goals that are measurable and timebound. If they don't meet the goal, how do they plan to make adjustments to make the goal in the future; let it be their plan, not yours.

4. **Learn from others, especially those in your CPESN Network / FtP Team:** Sharing what other coaches are doing and what other sites are doing has been helpful for me. The best practices that CPESN does are good, but I probably learn more in a 5-minute call or a short email from other coaches.

Stay in communication with your FtP Team Lead/ CPESN Network Facilitator: Your Team Lead and Network Facilitator should be able to provide valuable insight to what sites should be doing and how we as coaches can help them. Be in frequent communication with your Team Lead and if you are struggling with a site be sure to include them in site correspondence so they can help to also engage the site and address any issues.

eCare Plan Technology Partners Comparison Chart *(From 2020; website will be updated with a more updated chart when provided by technology partners)*
- May be helpful for pharmacies determining an eCare Plan vendor, if not done so already.
- Click **here** and click the blue button that is labeled "Comparison Chart"