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# PHA6631 Foundations of Medication Therapy Management I

Spring 2018

*3 Credit Hours – A-E Grading*

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*The course will introduce the student to the core elements of medication therapy management (MTM), physical assessment skills, communication techniques, and literature evaluation methods needed for the successful provision of MTM. The student will learn how to conduct various types of patient care interviews. Additionally, the student will develop confidence in communicating with patients and providers, performing physical assessment, and analyzing the medical literature.*

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## Course Faculty and Office Hours

Jennifer Salo, Pharm.D. BCACP  
Director of Quality and Compliance  
Adjunct Clinical Assistant Professor  
Center for Quality Medication Management  
Office: ECOB  
Phone: (352) 273-9694  
Email: [jaferrer@cop.ufl.edu](mailto:jaferrer@cop.ufl.edu)  
Office Hours: by appointment

*Please see Appendix A for a listing of all faculty members involved in this team-taught course.*

## Place and Time of Class Sessions

Lectures are prerecorded and posted on the course website in the CANVAS eLearning system. Lectures may be viewed at the student's convenience.

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## Course-Level Objectives

Upon completion of this course, the student will be able to:

1. Establish individual goals for personal practice and identify the MS-MTM program competencies that will enable achievement of these goals.
2. Define the core elements of Medication Therapy Management (MTM).
3. Outline how to provide MTM to an individual patient.
4. Obtain a thorough medication history from a patient that provides adequate information to conduct a comprehensive medication therapy review.
5. Utilize effective communication techniques when conducting a medication therapy management session.
6. Identify ineffective communication techniques that serve as barriers to the provision of MTM services.
7. Document patient assessment, pharmacotherapy, interventions, recommendations, evaluation, and follow-up using effective written communication.
8. Communicate MTM interventions effectively to other healthcare providers.
9. Identify drug information resources necessary for the provision of MTM services.

## Course Pre-requisites

The student must have successfully completed a Bachelor of Science in Pharmacy or a Doctor of Pharmacy degree, and must be licensed and in good standing with their respective state Board of Pharmacy. The student must be in good academic standing with the MS-MTM degree program.

## Course Outline

Please routinely check the Canvas course site for any messages about changes in the schedule including meeting dates/times, and deadlines. Refer to lecture schedule and learning responsibilities on the following pages.

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## Foundations of MTM I (PHA 6631) - Course Schedule

### Lecture schedule

Week	Module	Lecture Topic	Lecturer
<b>1</b> <b>01/08 - 01/12</b>	Course Introduction	1.1 Course Overview	Salo
		1.2 Student Resources	Salo
		1.3 Academic Integrity	DeLeo
		1.4 Time Management & Success in Online Examinations	DeLeo
		1.5 Medicare Overview	Salo
<b>2</b> <b>01/15 - 01/19</b>	Communication Skills	2.1 Motivational Interviewing	Zeigler
		2.2 Listening Skills	Williams
		2.3 Special Situations	Naboulsi
		2.4 Crisis and Emergency Situations	Salo
<b>3</b> <b>01/22 - 01/26</b>	Introduction to MTM	3.1 MTM History	Hardin
		3.2 Introduction to MTM	Zeigler
		3.3 MTM Practice Models	Roane
		3.4 Quality Programs and Star Performance Measures	Salo
		3.5 Enhanced MTM and SNOMEDCT Codes	Salo
<b>4</b> <b>01/29 - 02/02</b>	Patient Care Concepts	4.1 PCPP	Whalen
		4.2 Communication Skills for MTM	Naboulsi
		4.3 Geriatric Considerations	Wheat
		4.4 Medication Therapy Problems	Zeigler
<b>5</b> <b>02/05 - 02/09</b>	Patient Interview	5.1 Medication History	Whalen
		5.2 Medical History	Whalen
		5.3 Medical Interview	Whalen
		5.4 Completing the CMR	Roane
<b>6</b> <b>02/12 - 02/16</b>	Communication with Providers	6.1 Communicating with Providers	Vogel Anderson
		6.2 SBAR	Whalen
		6.3 Assertive Communication	Kimberlin
		6.4 Communication with Health Care Providers	Naboulsi

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		6.5 Effectively Communicating Recommendations	Connolly
7 02/19 – 02/23	Documentation	7.1 The Complicated Patient 7.2 SOAP Notes 7.3 Patient Takeaways 7.4 OutcomesMTM 7.5 Mirixa	Zeigler Vandervoort Wheat

### Assignments and Learning Responsibilities:

*All discussion boards due Sundays 6p.m., assignments due Saturdays 6p.m., and all Quizzes and Exams available from Fridays 6p.m.- Sundays 6p.m. at the end of the Weeks.*

Week	Learning Responsibilities/Critical Deadlines	Contact Hours
1 01/08 – 01/14	<ul style="list-style-type: none"> <li>• View all lectures for week 1</li> <li>• Review course syllabus</li> <li>• Assignments*:               <ul style="list-style-type: none"> <li>➤ Professional Email</li> <li>➤ Write to Respond</li> <li>➤ Drug Interaction Report</li> <li>➤ Adverse Drug Reaction Report</li> <li>➤ Discussion Board – MTM Provider Requirements</li> <li>➤ <a href="#">Library PubMedTutorial</a></li> <li>➤ <a href="#">Library Access Pharmacy Tutorial</a></li> </ul> </li> </ul> <p><b><i>Email your facilitator or post questions on the discussion board if you have questions about how to get started</i></b></p>	5 hours
2 01/15 – 01/21	<ul style="list-style-type: none"> <li>• View all lectures for week 2</li> <li>• Readings:               <ul style="list-style-type: none"> <li>➤ <a href="#">MTM Text, Chapter 8</a></li> <li>➤ Changing Behavior with MI</li> <li>➤ Motivational Interviewing and Diabetes: What Is It, How Is It Used, and Does It Work?</li> <li>➤ Motivational Interviewing and Specialty Pharmacy</li> <li>➤ Making Sense of Motivational Interviewing</li> </ul> </li> <li>• Assignments:               <ul style="list-style-type: none"> <li>➤ Review Supplemental MI Videos</li> <li>➤ Review Empathy Supplemental video</li> <li>➤ Motivational Interviewing Assignment</li> </ul> </li> </ul> <p><b>QUIZ 1 – Covers Wks 1 &amp; 2 **</b></p>	7 hours

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<p><b>3</b> <b>01/22 – 1/28</b></p>	<ul style="list-style-type: none"> <li>• View all lectures for week 3</li> <li>• Readings: <ul style="list-style-type: none"> <li>➤ MTM Text Chapter 1</li> <li>➤ MTM Text Chapter 2</li> <li>➤ MTM Text, Chapter 4</li> <li>➤ MTM Text, Chapter 3 Introduction - Patient Eligibility Requirements</li> <li>➤ Standardized Framework for Cross-Walking Medication Therapy Management Services to SNOMED CT Codes (Optional Supplement)</li> </ul> </li> <li>• Assignments*: <ul style="list-style-type: none"> <li>➤ HEDIS Measure Assignment</li> <li>➤ Discussion Board – Practice Model Assignment</li> </ul> </li> </ul>	<p>9 hours</p>
<p><b>4</b> <b>01/29 – 02/04</b></p>	<ul style="list-style-type: none"> <li>• View all lectures for week 4</li> <li>• Readings: <ul style="list-style-type: none"> <li>➤ Pharmacists' Patient Care Process</li> <li>➤ BEERs List</li> <li>➤ START/STOPP Criteria Version 2 Article and Med List</li> <li>➤ The Prescribing Cascade Revisited</li> <li>➤ Chapter 5 Drug Therapy Problems in Pharmaceutical Care Practice (Access Pharmacy). By Cipolle, Strand, Morley (Available on AccessPharmacy)</li> <li>➤ Opportunities and Responsibilities in Pharmaceutical Care</li> <li>➤ Preventing and resolving drug therapy problems by understanding patients' medication experiences (Optional Supplement)</li> </ul> </li> <li>• Assignments*: <ul style="list-style-type: none"> <li>➤ Geriatric Considerations – High Risk Medication Activity</li> </ul> </li> </ul> <p><b>**QUIZ 2 – Covers Wks 3 &amp; 4</b></p>	<p>5 hours</p>
<p><b>5</b> <b>02/05 – 02/11</b></p>	<ul style="list-style-type: none"> <li>• View all lectures for week 5</li> <li>• Readings: <ul style="list-style-type: none"> <li>➤ MTM Text, Chapter 7, Introduction through Conducting the Comprehensive Medication Reviews</li> <li>➤ The Patient Interview, pp 12-27</li> </ul> </li> <li>• Assignments: <ul style="list-style-type: none"> <li>➤ Medication History assignment</li> <li>➤ Discussion board – Living Room Language assignment</li> </ul> </li> </ul> <p><b>MIDTERM - Covers Wks 1 – 4;</b></p>	<p>8 hours</p>

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<p><b>6</b> <b>02/12 – 02/18</b></p>	<ul style="list-style-type: none"> <li>• View all lectures for week 6</li> <li>• Readings: <ul style="list-style-type: none"> <li>➤ MTM Text, Chapter 6</li> <li>➤ Effective Communication with Prescribers</li> </ul> </li> <li>• Assignments*: <ul style="list-style-type: none"> <li>➤ Prescriber Recommendation Fax Statement Assignment</li> </ul> </li> </ul> <p><b>QUIZ 3 – Covers weeks 5 &amp; 6;</b></p>	<p>7 hours</p>
<p><b>7</b> <b>02/19 – 02/25</b></p>	<ul style="list-style-type: none"> <li>• View all lectures for week 7</li> <li>• Readings: <ul style="list-style-type: none"> <li>➤ MTM Text, Chapter 9</li> <li>➤ Clinical Documentation for Patient Care</li> <li>➤ MTM Text, Chapter 7, After the Comprehensive Medication Review: Care Plan through Conclusion</li> <li>➤ MTM Text, Chapter 11</li> <li>➤ MTM Program Standardized Format</li> <li>➤ MTM Program Standardized Format Instructions</li> <li>➤ Diabetes Patient Case Study (Optional Supplement)</li> </ul> </li> <li>• Assignments*: <ul style="list-style-type: none"> <li>➤ Comprehensive Medication Review Assignment <ul style="list-style-type: none"> <li>○ Medication Action Plan and Personalized Medication List</li> <li>○ Prescriber Communication</li> </ul> </li> <li>➤ Prioritizing Medication Therapy Problems Assignment</li> </ul> </li> </ul>	<p>10 hours</p>

**\*\*FINAL EXAM - Covers ALL material**

\* Assignments will be released on Canvas at least two weeks prior to due date. **All assignments should be completed on an individual basis unless otherwise specified.**

\*\*Exams and quizzes are open book. They must be completed online within the designated time. Late exams or quizzes will result in a point reduction of 1 point for each minute after the deadline.

## Required Textbooks/Readings

Angaran D, Whalen K, editors. Medication Therapy Management: A Comprehensive Approach. New York, NY: McGraw-Hill, 2015. – This is available through the HSC website using AccessPharmacy

- Instructors may require additional readings such as clinical guidelines, review articles, book chapters, or websites. They may also provide additional resources to supplement the lecture material. Required or recommended readings will be listed under assignments and responsibilities on the course schedule. Links to the reading or instructions for accessing the reading will be available on the course website.
- Use [UF VPN to access UF Libraries Resources](#) when off-campus.

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- The UF HSC library staff can assist you with questions or issues related to accessing online library materials. For assistance contact your College of Pharmacy librarian or visit the [HSC Library Website](http://www.library.health.ufl.edu/) at this URL: <http://www.library.health.ufl.edu/>

## Materials & Supplies Fees

None

## Student Evaluation & Grading

Assessment Item	Grade Percentage
Drug Interaction Report & Adverse Reaction Report	1%
Medication History Assignment	3%
Motivational Interviewing Assignment	3%
High Risk Medication Activity	4%
HEDIS Measure Assignment	3%
Prescriber Communication Fax Statement Assignment	5%
Discussion Board (3 at 1% each)	3%
Prioritizing Medication Therapy Problems Assignment	3%
Comprehensive Medication Review Assignment (MAP/PML/MD Fax)	10%
Quizzes (3 at 5% each)	15%
Midterm exam	25%
Final exam	25%
<b>Total</b>	<b>100%</b>

### Grading Scale

A 93-100	A- 90.0-92.9
B+ 86.6-89.9	B 83.3-86.5
B- 80.0-83.2	C+ 76.6-79.9
C 73.3-76.5	C- 70.0-73.2
D+ 66.6-69.9	D 63.3-66.5
D- 60.0-63.2	E <60

### Rounding of grades:

Final grades in Canvas will be rounded to the 2<sup>nd</sup> decimal place. If the decimal is X.495 or higher, Canvas will round the grade to X.50. The above scale depicts this policy and grades are determined accordingly. Grade

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assignment is made using this policy and NO EXCEPTIONS will be made in situations where a student's grade is "close."

## Educational Technology Use

The following technology below will be used during the course and the student must have the appropriate technology and software.

1. Canvas™ Learning Management System

For technical support, navigate to [Educational Technology and IT Support Contact Information](http://curriculum.pharmacy.ufl.edu/current-students/technical-help/) at this URL:  
<http://curriculum.pharmacy.ufl.edu/current-students/technical-help/>

## Course Policies

### *Class Attendance Policy*

### **Quiz/Exam Policy**

#### **Online Examinations**

The quizzes, midterm, and final examination will be administered online. Online examinations may consist of multiple choice, short answer and/or case-based questions. Thus, online examinations necessitate skills in typing and using a computer. **If you do not have strong keyboard skills, please do not delay in contacting the course coordinator. With early intervention, you can be directed to staff members who are equipped to review your needs.** Please note that it takes time to build these skills and this is not something that can be done at the last minute. To maintain the highest standards of academic integrity, high stakes online examinations may require the use of a proctoring system.

#### **Missing Exams and Make-Up Exam Policy**

Scheduled exams should only be missed for REAL EMERGENCIES. A student who misses an exam should notify the course coordinator via email within 24 hours. Students with an excused absence may be allowed to take a make-up exam. Make-up exams should be arranged with the course coordinator and administered within two weeks of the original exam date.

#### **Posting of Exam Grades**

Exam grades will be posted within one week of the exam. Notice will be provided to the students if there will be a delay in posting of exam grades.



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**Exam Rebuttals**

Students have one week after posting of the exam grades to challenge any exam question. No appeals will be accepted after one week. Written appeals must include the following: the question number, an evidence-based rationale for why the student feels their response is accurate. The exam will be regraded, in full, by a third party. Note: the score of a fully regraded exam may increase, decrease, or stay the same. The regraded score will be considered final.

**Policy on Old Quizzes and Assignments**

Students will not be provided with old quizzes, exams, or assignments.

**Assignment Deadlines****Late Assignments**

Please submit online assignments early to avert last minute issues with technology. Late submission of assignments will result in a 20%-point deduction without adequate explanation and may result in a zero grade, depending on the assignment. Students who experience technical difficulty when submitting assignments electronically must notify the course coordinator as soon as possible.

**General College of Pharmacy Course Policies**

The College of Pharmacy has a website that lists course policies that are common to all courses. Please see the following URL for this information : <http://curriculum.pharmacy.ufl.edu/current-students/course-policies/>

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# Appendix A. Course Directory

## Directions for Contacting Course Faculty

All questions pertaining to course logistics should be posted on the course logistics discussion board. Questions for individual lecturers should be posted on the discussion under the relevant topic, so that classmates may benefit from the discussion. Please do not email the lecturers directly unless directed to do so by the course coordinator, or if the question is of a personal nature, i.e., not related to clarification of course content.

## Instructors

### **Justin De Leo, M.Ed.**

Justin De Leo has a background is in academic instruction, curriculum development, pedagogical design, technical writing, and information technology. His research interests include social development theory, experiential learning theory, active learning events via mobile technology, the effect of social networking tools to enhance synchronous learning experiences, and redesigning assessment to measure teaching & learning; cognitively & affectively. Justin is committed to education and to supporting those who teach and learn. He is excited for the opportunity to coordinate instructional design for the MTM program, and he looks forward to working with you and helping make your experience here the best it can be.

### **Joseph Gruber, RPh, CGP, FASCP**

Joseph Gruber is responsible for demonstrating the value of Mirixa's clinical pharmaceutical care programs and MirixaPro® platform to healthcare industry stakeholders and professional organizations. Joseph is a Board Certified Geriatric Pharmacist and Certified Gerontologist and has practiced in the long term care and senior care setting for over 20 years. Prior to joining Mirixa he was President and CEO of ASCP Ventures. Joseph has spoken and published at the national level on many patient care topics.

### **Heather Hardin, Pharm.D., BCACP**

Dr. Hardin is a Clinical Assistant Professor and Operations Manager at the Medication Therapy Management (MTM) Communication and Care Center at the University of Florida College of Pharmacy, where she provides comprehensive medication reviews to patients, precepts students, and mentors Pharmacy Residents. The center is a Geriatric and MTM APPE site for fourth-year student pharmacists. Dr. Hardin is a Board Certified Ambulatory Care Specialist. She is also active in local and national pharmacy organizations, and is the current President of the Alachua County Association of Pharmacists.

### **Mariyem Naboulsi, Pharm.D.**

Mariyem is the current PGY-1 MTM/Geriatric Resident for the Center for Quality Medication Management at the University of Florida. She went to pharmacy school in Findlay, Ohio, but was raised in Rochester Hills, MI. She graduated from The University of Findlay, College of Pharmacy in 2017 with her PharmD. As she was completing her education, she knew she was going to be a community pharmacist because she felt most fulfilled when she

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had the opportunity to interact with patients face-to-face on a daily bases. She realized she had a special interest in MTM after completing the APhA MTM course. In her current role at CQM, Mariyem performs MTM services for Medicare patients on a daily basis. She also assists with training and precepting the rotation students at CQM.

**Teresa Roane, Pharm.D., BCACP**

Dr. Teresa E. Roane is the Associate Director of the Center for Quality Medication Management (CQM) at the University of Florida (UF). She is responsible for all aspects of both Center locations (in Gainesville and Lake Nona) including operations, client relations and retention, and business development. In addition, she is a Clinical Assistant Professor for the UF College of Pharmacy where she provides education to student pharmacists enrolled in the PharmD program and those assigned to the Center for their APPE rotations, as well as two PGY-1 pharmacy practice residents. Prior to joining UF, Dr. Roane worked as a clinical pharmacist at AvMed Health Plans. In 2005, while at AvMed, she helped create their medication therapy management (MTM) program, and served as the lead pharmacist of the project. She also provided direct oversight of the utilization management program, was a resource for both internal and external healthcare professionals, and educated student pharmacists on their APPE clerkship rotations. She obtained her board certification in ambulatory care in 2011. Currently she serves as a member of the Board of Directors' for the Alachua County Association of Pharmacists (ACAP), continues to work as a relief pharmacist at a small community pharmacy chain, and completing her master's degree in business administration.

**Jennifer Salo, Pharm.D., BCACP**

Jennifer Salo is the Director of Quality and Compliance for the Center for Quality Medication Management (CQM) at the University of Florida. In this role, Jennifer oversees the quality program for medication therapy management services and performance measure services. Previously, Jennifer was the Director of Operations for CQM and in that role she lead the staff that provided medication therapy management services and performance measure improvement services and ensured that the staff met and exceed their performance goals. Jennifer is no stranger to medication management, she has been with CQM since 2011 and spent five years as a clinical pharmacist and a student preceptor. In her previous role at CQM, she was responsible for precepting fourth year pharmacy students on clerkship rotations and she was also responsible for creating the procedures and training for all MTM staff at CQM. Jennifer is a clinical pharmacist and holds a Doctor of Pharmacy degree from the University of Florida. She is also a board certified ambulatory care pharmacist.

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**Lisa Vandervoort, Pharm.D.**

Dr. Vandervoort received her Doctor of Pharmacy degree from the University of Florida College of Pharmacy in 1995 and completed a Pharmacy Practice Residency at Shands Hospital at the University of Florida in 1996. She spent 10 years as the Clinical Specialist in Infectious Disease/Internal Medicine at Orlando Regional Medical Center. For the past 5 years Dr Vandervoort has been a Clinical Assistant Professor at the University of Florida both at the Orlando Campus and with the WPPD program. Her primary interests include pharmacokinetics, infectious disease and internal medicine.

**Katherine Vogel Anderson, Pharm.D., BCACP**

Katherine Vogel Anderson earned her Bachelor of Science degree in biochemistry, with a minor in math, from the Florida State University in 1999. In 2003, Dr. Vogel Anderson graduated with her doctorate of pharmacy degree from the University Of Florida College Of Pharmacy. Following this, Dr. Vogel Anderson completed a primary care pharmacy residency at the Malcom Randall Veterans Affairs Medical Center in Gainesville. After her residency, Dr. Vogel Anderson accepted a clinical pharmacy specialist position at the same VA, in the pharmacotherapy clinic, where she specialized in anticoagulation management. She held this position for five years, before transferring to the VA geriatric primary care clinic, where she managed anticoagulation, hypertension, and diabetes, among other disease states, as part of a multi-disciplinary health care team. Dr. Vogel Anderson joined the Gainesville UF faculty in April, 2010. In addition to her teaching responsibilities, Dr. Vogel Anderson practices at the UF Health Internal Medicine Outpatient Clinic, where she manages an anticoagulation/ pharmacotherapy service and mentors her PGY-1 pharmacy resident.

**Karen Whalen, Pharm.D., BCPS, CDE, FAPhA**

Dr. Whalen is Assistant Dean for Clinical Education and a Clinical Professor in the Department of Pharmacotherapy and Translational Research at the University of Florida College of Pharmacy. She received her Doctor of Pharmacy degree with highest honors from the University of Florida. She completed a Pharmacy Practice Residency at the Moses Cone Health System followed by a Primary Care Residency at the James A. Haley Veterans' Hospital. Following residency training, Dr. Whalen was a faculty member in the Department of Pharmacy Practice at Nova Southeastern University (NSU) for 12 years. While at NSU College of Pharmacy, she was an eight-time recipient of the Golden Apple Award for Teaching Excellence. In 2008, Dr. Whalen joined the faculty of the University of Florida College of Pharmacy as assistant director of the St. Petersburg Campus. In 2010, she transitioned to the main campus in Gainesville. Her excellence in teaching was recognized with the Faculty Recognition Award in 2011 and 2012, and the Teacher of the Year Award in 2013. Dr. Whalen is a Board Certified Pharmacotherapy Specialist and a Certified Diabetes Educator. She has practiced ambulatory care pharmacy in a variety of settings including an academic family medicine center, community pharmacy practice, and a Veterans' Affairs Healthcare System. Dr. Whalen is active in local, state and national pharmacy organizations, and is a past president of the Florida Pharmacy Association.

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**Leah Wheat, Pharm.D.**

Leah Wheat is currently a PGY1 Pharmacy Resident at the Center for Quality Medication Management (CQM) at the University of Florida (UF) College of Pharmacy (Orlando campus). She earned her BA in biochemistry followed by her PharmD at the University of South Florida in Tampa. She is currently participating in the teaching certificate program at the UF College of Pharmacy, and she also assists with rotation student precepting at the CQM. In her current role at CQM, Leah performs MTM services and adherence services for Medicare patients on a daily basis.

**Trinity Williams, Pharm.D.**

Trinity Williams, a 2017 UF College of Pharmacy graduate, is currently serving as one of the PGY-1 pharmacy residents at the Center for Quality Medication Management at the University of Florida. Before coming to Gainesville in 2013, Trinity completed his undergraduate studies at Chipola College in Marianna, FL and Florida A&M in Tallahassee, FL. Drawn to MTM to by his passion for patient interaction, Trinity has a long term goal to provide MTM in a primary care setting such as a physician's office. In his current role at CQM, Trinity performs comprehensive medication review, targeted medication reviews, trains rotation students, and precepts rotation students.

**Michelle Zeigler, PhD, Pharm.D., BCACP**

Dr. Zeigler has been with the Center for Quality Medication Management (CQM) at the University of Florida since 2012. She joined the Lake Nona campus when it opened in August 2012 as a clinical pharmacist after completing a PGY-1 Pharmacy Residency at the Sarasota VA Community Based Outpatient Clinic. Her ambulatory care experiences in anticoagulation, diabetes, hypertension, and hyperlipidemia served as a foundation in providing MTM services such as comprehensive medication reviews, adherence services, and various prescriber outreach projects. Dr. Zeigler joined the University of Florida Faculty as Clinical Assistant Professor in 2016, with interests in healthcare communication, motivational interviewing, and quality measures. In addition to teaching in the PharmD curriculum, she precepts third- and fourth-year pharmacy students on clinical rotations and is the Lake Nona PGY-1 resident preceptor.