

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
Centers for Medicare & Medicaid Services



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## A Physician's Guide to Medicare Part D Medication Therapy Management (MTM) Programs

Note: This article was revised on August 24, 2017, to provide updated information, primarily in the new "Part D Enhanced Medication Therapy Management Model" section on page 5. All other information is unchanged.

### Provider Types Affected

This MLN Matters® Article Special Edition about Medication Therapy Management (MTM) services is intended for physicians, pharmacists, nurses, and other health care providers who treat Medicare beneficiaries with Part D coverage.

### Provider Action Needed

This MLN release is intended to make you aware of Medicare Part D MTM programs that will affect your patients, and introduce you to three MTM forms that your patients are likely to share with you.

Your patients may ask you if they would benefit from MTM services. If you have patients enrolled in Part D MTM programs, you may also be contacted by MTM providers who are required to monitor patients' medication therapies from all their health care providers. This may result in recommendations that are shared with you about unsafe or dangerous interactions and therapeutic alternatives. Your patients may also receive recommendations about how to use their medications properly.

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## **MTM Providers Are Important Partners with You**

MTM providers work with physicians to deliver the best medication therapy to patients and to coordinate their medication therapy across multiple practitioners. The latest clinical information is used by MTM providers when reviewing patients' medication therapy, such as updates to the Beers criteria for high-risk medications and revised monographs for old and new medications. MTM providers also listen to patients' concerns about their medications and may offer recommendations to physicians and patients to help achieve their goals of therapy. As always, physicians make the final decisions about changes in drug therapy.

## **When Will MTM Providers Contact You?**

Your patients enrolled in MTM may receive an interactive comprehensive medication review (CMR) any time during the year.

- The MTM provider may reach out to you in order to clarify your patient's medical history prior to a review or information received from your patient during the review, such as why and how they are supposed to use their medications.
- After a CMR, the MTM provider may contact you with questions or recommendations about your patient's medications, or your patient may call you to discuss suggestions they received from the MTM provider.

Targeted medication reviews (TMRs) are processed throughout the year, at least quarterly, to identify specific or potential medication-related problems. You may be contacted by the MTM provider if a TMR identifies a potential medication-related problem for your patient.

Other communications may be sent to you periodically throughout the year. These communications are intended to help resolve other potential medication-related problems or identify other opportunities to optimize your patient's medication use.

## **What Materials Will My Patients Receive?**


If your patients are enrolled in a Part D MTM program, they will receive a printed standardized summary, Form CMS-10396, as a reference about their CMR. This summary will include a Cover Letter, Medication Action Plan, and Personal Medication List. Your patients are encouraged to share these documents with you and other healthcare providers at their regular visits and request updates as needed. Examples of the three forms follow:

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## Cover Letter

- The Cover Letter reminds your patient of their CMR, introduces the Medication Action Plan and Personal Medication List, and describes how to contact the MTM program.

<p><i>Dr. Jane Doe</i> 1500 Main Street Anytown, MD 21201</p>	
<p>January 30, 2017</p>	
<p>Mr. John Smith 999 Straight Road Washington, DC 80008</p>	
<p>Dear Mr. Smith:</p>	
<p>Thank you for talking with me on January 20, 2017 about your health and medications. Medicare's MTM (Medication Therapy Management) program helps you understand your medications and use them safely.</p>	
<p>This letter includes an action plan (Medication Action Plan) and medication list (Personal Medication List). <b>The action plan has steps you should take to help you get the best results from your medications. The medication list will help you keep track of your medications and how to use them the right way.</b></p>	
<ul style="list-style-type: none"> <li>• Have your action plan and medication list with you when you talk with your doctors, pharmacists, and other healthcare providers in your care team.</li> <li>• Ask your doctors, pharmacists, and other healthcare providers to update the action plan and medication list at every visit.</li> <li>• Take your medication list with you if you go to the hospital or emergency room.</li> <li>• Give a copy of the action plan and medication list to your family or caregivers.</li> </ul>	
<p>If you want to talk about this letter or any of the papers with it, please call Dr. Jane Doe at 1-800-222-3333 between the hours of 9am and 5pm, Monday through Friday. I look forward to working with you, your doctors, and other healthcare providers to help you stay healthy through the Birchwood Medicare Plus MTM program.</p>	
<p>Sincerely, <i>Jane Doe</i> Jane Doe, PharmD Pharmacy Manager</p>	
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### Medication Action Plan

- The Medication Action Plan describes the specific action items for your patient to help resolve issues of current drug therapy and achieve the goals of medication treatment. Your patient can keep notes of their progress and use it to clarify and discuss any concerns about their medications and treatment plans with you.
- The MTM provider will send separate recommendations to you if needed.

Dr. Jane Doe  
1500 Main Street  
Anytown, MD 21201



**MEDICATION ACTION PLAN FOR Mr. John Smith, DOB: 07/04/1940**

This action plan will help you get the best results from your medications if you:

1. Read "What we talked about."
2. Take the steps listed in the "What I need to do" boxes.
3. Fill in "What I did and when I did it."
4. Fill in "My follow-up plan" and "Questions I want to ask."

Have this action plan with you when you talk with your doctors, pharmacists, and other healthcare providers in your care team. Share this with your family or caregivers too.

**DATE PREPARED: 01/20/2017**

<b>What we talked about:</b>	
<ul style="list-style-type: none"> <li>• High Cholesterol</li> </ul>	
<b>What I need to do:</b>	<b>What I did and when I did it:</b>
<ul style="list-style-type: none"> <li>• Monitor diet; eat fewer high cholesterol foods (see dietary handout for healthier options).</li> <li>• Get your cholesterol checked.</li> </ul>	

<b>What we talked about:</b>	
<ul style="list-style-type: none"> <li>• High Blood Pressure - at visit on 1/14/2013 it was 154/92 mmHg</li> </ul>	
<b>What I need to do:</b>	<b>What I did and when I did it:</b>
<ul style="list-style-type: none"> <li>• Check blood pressure at least 3 times a week and record on log.</li> <li>• Maintain blood pressure less than 130/80 mmHg.</li> <li>• Monitor salt in my diet and increase daily exercise.</li> <li>• Make an appointment with physician to have blood pressure rechecked and share log.</li> </ul>	

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<b>What we talked about:</b>	
<ul style="list-style-type: none"> <li>• Diabetes</li> </ul>	
<b>What I need to do:</b>	<b>What I did and when I did it:</b>
<ul style="list-style-type: none"> <li>• Continue to check blood sugar once a day.</li> <li>• Maintain fasting blood sugar less than 120 and greater than 70.</li> <li>• Make an appointment to see the podiatrist within one month.</li> </ul>	

<b>What we talked about:</b>	
<ul style="list-style-type: none"> <li>• How to use your Metered Dose Inhaler - Albuterol</li> </ul>	
<b>What I need to do:</b>	<b>What I did and when I did it:</b>
<ul style="list-style-type: none"> <li>• Refer to the attached handout on proper inhaler technique.</li> <li>• Always use spacer with inhaler.</li> <li>• Keep this medication with me at all times - "rescue inhaler".</li> </ul>	

**My follow-up plan (add notes about next steps):**

**Questions I want to ask (include topics about medications or therapy):**

If you have any questions about your action plan, call Dr. Jane Doe at 1-800-222-3333 between the hours of 9am and 5pm, Monday through Friday.

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### Personal Medication List


- The Personal Medication List is a reconciled list of the medications used by your patient at the time of the review. Information from your patient, Medicare Part D claims data, or other sources may be used to develop the list. It is intended to help your patient understand their medications and how they relate to their treatment plans. Your patient can make notes on their Personal Medication List such as when and why they stopped taking a medication.

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- You can use the Personal Medication List as verification of your patient’s current medication regimen and provide written adjustments, as needed. The medication list can also improve communication with you and other healthcare providers seen by your patient.

Dr. Jane Doe  
1500 Main Street  
Anytown, MD 21201



**PERSONAL MEDICATION LIST FOR Mr. John Smith, DOB: 07/04/1940**

This medication list was made for you after we talked. We also used information from Medicare Part D claims data.

- Use blank rows to add new medications. Then fill in the dates you started using them.
- Cross out medications when you no longer use them. Then write the date and why you stopped using them.
- Ask your doctors, pharmacists, and other healthcare providers in your care team to update this list at every visit.

Keep this list up-to-date with:

- prescription medications
- over the counter drugs
- herbals
- vitamins
- minerals

If you go to the hospital or emergency room, take this list with you. Share this with your family or caregivers too.

**DATE PREPARED:** 01/20/2017

**Allergies or side effects:** Penicillin - hives and difficulty swallowing

**Medication:** Simvastatin 20 mg tablet  
**How I use it:** Take one tablet (20 mg) by mouth every night  
**Why I use it:** High Cholesterol **Prescriber:** Dr. Joe Anne

**Goals:**

- LDL (Low Density Lipoproteins) < 100 mg/dL
- HDL (High Density Lipoproteins) > 40 mg/dL

**Date I started using it:** January 2013 **Date I stopped using it:**  
**Why I stopped using it:**

**Medication:** Glipizide XL (Glucotrol XL) 5 mg tablet  
**How I use it:** Take one tablet (5mg) by mouth once daily  
**Why I use it:** Type 2 Diabetes **Prescriber:** Dr. Joe Anne  
**Date I started using it:** June 2014 **Date I stopped using it:**  
**Why I stopped using it:**

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**PERSONAL MEDICATION LIST FOR Mr. John Smith, DOB: 07/04/1940**  
(Continued)

**Medication:** Acetaminophen 325 mg tablet  
**How I use it:** Take one tablet (325 mg) by mouth as needed for pain (3-4 tablets usually each day)  
**Why I use it:** Knee Pain **Prescriber:** Self

**Reminder:**

- Taking more than 3000mg of Acetaminophen a day can increase your chance of liver toxicity.
- Do not drink alcohol with this medication. It can increase your risk of liver problems.

**Date I started using it:** **Date I stopped using it:**  
**Why I stopped using it:**

**Medication:** Albuterol Sulfate Inhalation Solution (Ventolin HFA)  
**How I use it:** Use 2 puffs every 6 hours as needed for shortness of breath  
**Why I use it:** Breathing **Prescriber:** Dr. Joe Anne

**Reminder:**

- Refer to leaflet on proper technique.
- Keep with you at all times - "rescue inhaler."

**Date I started using it:** Early 2015 **Date I stopped using it:**  
**Why I stopped using it:**

**Medication:**  
**How I use it:**  
**Why I use it:** **Prescriber:**  
**Notes:**  
**Date I started using it:** **Date I stopped using it:**  
**Why I stopped using it:**

**Medication:**  
**How I use it:**  
**Why I use it:** **Prescriber:**  
**Notes:**  
**Date I started using it:** **Date I stopped using it:**  
**Why I stopped using it:**

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### How Do You Refer Patients to MTM Services?

Calling the prescription drug plan directly is the best way to find out if your patient is eligible for that plan’s MTM services. You can also refer your patient to their local State Health Insurance Assistance Program (SHIP) office. A local SHIP counselor can be found by searching the following website: <https://www.shiptacenter.org>.

### Part D Enhanced Medication Therapy Management Model

Certain plans in Arizona, Florida, Iowa, Louisiana, Minnesota, Montana, Nebraska, North Dakota, South Dakota, Virginia, and Wyoming are participating in a new test to determine if expanded MTM services can help improve health outcomes and reduce health care expenditures. Participating plans are permitted to target enrollees using a different criteria than the standard MTM program and offer additional services beyond the CMR and TMR to improve their medication usage. If one of your patients is enrolled in a participating plan, the Part D plan may reach out to you to better coordinate care and improve information sharing.

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## Summary

Medicare Part D MTM programs promote coordinated care and improve medication use through services that engage the patient, their physicians, and other healthcare providers. You may see three forms that your patients will receive if they are enrolled in a Part D MTM program and have received a CMR. These forms are intended to provide the patient with information about their medication use and also be used as a platform for discussion with you and their other health care providers.

## Additional Information

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For additional information about Medicare Part D MTM programs and the standardized CMR summary documents, go to <http://www.cms.gov/Medicare/Prescription-Drug-Coverage/PrescriptionDrugCovContra/MTM.html> on the CMS website.

Please send any general questions about Part D MTM programs to [PartD\\_MTM@cms.hhs.gov](mailto:PartD_MTM@cms.hhs.gov). Questions about a specific plan's MTM services or eligibility criteria should be addressed to that Part D plan.

## Document History

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Date of Change	Description
August 24, 2017	The article was revised to provide updated information primarily in the new "Part D Enhanced Medication Therapy Management Model" section on page 5.
October 11, 2012	Initial Article issued

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