



*McKesson Adherence
Performance Solution™*

Adherence Performance Solution User Guide

Release 2.3.0.2

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About the Guide

Purpose of the User Guide

This document provides step-by-step procedures for using APS.

Typographic Conventions Used in This Document

The following typographic conventions are used in this document:

Convention	
Boldface text	<p>Boldface text is used when referring to the name items on a screen, like the following examples:</p> <ul style="list-style-type: none"> • Tab names - Patient Info tab • Button names - Next Workflow Step button
Blue Text	<p>Blue Text indicates that this is a Cross Reference link to other areas of the chapter or areas in other chapters of the document. The link may also include the page number where the link will take you.</p> <p>Select the link to go to the desired location.</p>
Note: or Notes:	<p>Note text or icon is used to inform you of some key points or to add some information about the subject or task.</p>  <div style="background-color: #f4a460; padding: 10px; margin-left: 20px;"> <p>Note:</p> </div>
Important:	<p>Important text or icon is used to alert you about some information that is necessary to successfully complete a task.</p>  <div style="background-color: #9b59b6; padding: 10px; margin-left: 20px;"> <p>Important:</p> </div>

Related Documentation

Please refer to the online document library located on the McKesson Learning website (<http://learning.mckesson.com>) for the following manuals:



- **Release Notes**—Contains information in specific releases on the New Features, Enhancements and Updates made to the software.
- **User Guide**—Contains the information on how to configure and use APS.

You can also access an online version of the APS User Guide by going to the **About** tab and selecting **Help**.

Chapter 1: Introduction to Adherence Performance Solution

Key Concepts in Adherence Performance Solution™

- ["The McKesson Adherence Performance Solution" on the next page](#)
 - ["What is Adherence Performance Solution?" on the next page](#)
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The McKesson Adherence Performance Solution

What is Adherence Performance Solution?

The Adherence Performance Solution (APS) is a set of data displayed on a website that allows pharmacies to measure their patients' medication adherence.

The Adherence Performance Solution is modeled after how the CMS (Centers for Medicare and Medicaid Services) calculate Star Ratings for Medicare Part D plans. Results in APS are reported by individual pharmacy and/or pharmacy chain, the Adherence Performance Solution measures patients on the supported drug therapies using a list of medications published by CMS for each measured disease state. APS uses data directly from the pharmacy management system to calculate each patient's PDC (Proportion of Days Covered). The patient data is then rolled up to the individual pharmacy level to determine the percentage of adherent patients at each pharmacy. Similar to CMS, APS uses the criteria that 80% PDC and above is considered adherent. APS calculates the percentage of adherent patients per pharmacy and assigns a 1-5 rating if a rating scale has been published for the Drug Category.

Why Use the Adherence Performance Solution?

With APS, a pharmacy can identify non-adherent patients and the number of adherent patients needed to improve the pharmacy's rating. Once patients are identified, pharmacies can use the many tools provided by McKesson to address each patient's specific reason for non-adherence.

Adherence and Medicare Plan Star Ratings

What is Adherence and Why is it Important to Pharmacies?

Adherence to (or compliance with) a medication regimen is generally defined as the extent to which patients take medications as prescribed by their health care providers. Adherence is generally measured using a calculation of Proportion of Days Covered (PDC) based on the patient's fill history for a specific medication during a predetermined measurement window (for example, 12 months, calendar year, etc.). If patients are filling their prescriptions, it's likely they are taking their medications as prescribed or close to the instructions provided by the healthcare provider on a prescription. One or more of the following might be the reason why a patient is not consistently refilling a prescription as expected:

- patient is having trouble remembering to take their medications as prescribed
- patient is experiencing side effects
- patient's health care provider has changed/discounted the therapy
- cost aversion or other prescription coverage issues
- pick-up or delivery issues

Pharmacies are in the position to notice potential issues and help with resolutions. By helping patients get back on track with their treatment, pharmacies can improve patient health outcomes, and demonstrate their value to health plans and providers.

Adherence is important to health plans because non-adherence causes:

- ~30% to 50% of treatment failures
- 125,000 deaths per year
- \$100 to \$300 billion loss to the healthcare system per year

Adherence is important to pharmacies because non-adherence causes:

- plans to exclude pharmacies from their network
- loss of profits

What are Medicare Plan Star Ratings?

Medicare uses a rating system to measure how well Medication Prescription Drug (Part D) and Medicare Advantage (Part C) plans perform by scoring plans on how well they do in several categories, including quality of care and customer service. Ratings range from 1 to 5 stars, with five being the highest rating and one being the lowest rating. The star ratings do not apply directly to pharmacies. However, Domain 4 of Medicare Part D specifically relates to patient safety, including adherence measurements and measurement of high risk medications in the elderly population. The categories tracked in APS include:

- Medication Adherence for Diabetes (non-insulin) Medications
- Medication Adherence for Hypertension (RAS antagonists)
- Medication Adherence for Cholesterol (Statins)
- High Risk Medications in the elderly (as defined by the Centers for Medicare and Medicaid Services)
- Statin Use in Persons with Diabetes (SUPD)

To determine star ratings, the Centers for Medicare & Medicaid Services (CMS) measures patient adherence and calculates the percentage of adherent patients within each specific plan. The plan is then assigned a rating of 1-5 based on the percentage of adherent patients in that plan. McKesson's Adherence Performance Solution uses the same PDC calculation for assigning an adherence rating to the pharmacy.

How is Adherence Measured?

Adherence is measured by the proportion of days covered (PDC): the number of days covered by refills within a measurement window divided by the number of days in the measurement window.

For example, if a patient is on a diabetes treatment, the number of refills the patient receives over a 12 month period is reviewed. If a patient refills a prescription with a 30 day supply 9 times within 12 months, they have 270 days of coverage out of 365 days. The proportion of days covered is found by dividing 270 by 365, which equals 0.74 or 74%.

To be considered adherent in APS, a patient's PDC must be equal to or greater than 80%.

Adherence Calculations

The calculations for the adherence measures for diabetes, hypertension, and cholesterol in APS are all based on the calculations CMS uses to determine Star Ratings for Medicare Part D plans and does not segregate out Medicare Advantage plans to rate them differently.

- **Data:** APS uses fill data from the customer's pharmacy management system.
- **Transaction Dates:** Due to differences in pharmacy management systems, measures are calculated by different date fields depending on the product. EnterpriseRx data is calculated based on the sold date. Pharmaserv and PharmacyRx data are calculated based on the dispense date.

Calculating Adherence

- Using the patient's refill data, medications are identified by NDC as guided by CMS for each measure, the PDC is calculated for that patient based on Proportion of Days Covered (PDC) over the measurement window.
- Based on refills over a 12-month rolling period and 6-month rolling period, the patient's PDC is calculated. If the PDC is 80% or more, the patient is considered adherent, while if it is less than 80%, the patient is non-adherent.

Example Calculation

- Jim has been filling his prescription at Acme Pharmacy over the last 12-month period.
- Some of Jim's refills were several days late, Jim's 12-month PDC is 75% and his 6-month PDC is 70%. Jim is non-adherent (PDC less than 80%) based on both the 12-month and 6-month PDC ratings.
- As the pharmacy works with Jim to become more adherent, that should be reflected in his 6-month PDC score going forward sooner than it would in his 12-month PDC.

Exclusion Criteria

The Pharmacy Quality Alliance (PQA) provides guidance on the measures. The guidelines specify exclusion criteria for diabetes, hypertension, cholesterol, and SUPD. Patients with the following medical conditions should be excluded from the measures:

Diabetes, Cholesterol

- End-Stage Renal Disease
- Hospice Care

Hypertension

- Hospice Care

SUPD

- End-Stage Renal Disease
- Hospice Care
- Lactation
- Liver Disease
- Myopathy
- Patient taking Fertility Medications
- Pre-Diabetes
- Pregnancy
- Polycystic Ovary Syndrome (PCOS)
- Rhabdomyolysis

**Important:**

APS does not apply some of these exclusions. A warning message displays in the **Patient Statistics** when exclusion criteria was not applied.



For more information on the PQA refer to their website: <https://www.pqaalliance.org/>.

Pharmacy Adherence Rating Assignment

The pharmacy’s adherence rating of 1-5 is based on the percent of adherent patients that the pharmacy has for each of the adherence measures.

Ratings assignments are based on the same criteria CMS uses to assign Star Ratings to plans for the adherence measures for Diabetes (Non-insulin), Hypertension, Cholesterol and SUPD Drug categories. The rating scales are updated yearly, and each time it gets more difficult to achieve the higher ratings.

2022 CMS Cut Points for PDP % of Adherent Patients per Plan Measured				
Star Rating	Diabetes (Non-insulin)	Hypertension	Cholesterol	SUPD
1	<84%	<85%	<82%	<77%
2	≥84% to <86%	≥85% to <88%	≥82% to <86%	≥77% to <79%
3	≥86% to <88%	≥88% to <89%	≥86% to <88%	≥79% to <82%
4	≥88% to <90%	≥89% to <91%	≥88% to <90%	≥82% to <84%
5	≥90%	≥91%	≥90%	≥84%

The APS target patient lists, on the main dashboard, will stop displaying patients when they have no coverage in a drug class for the recent 3 calendar months. Patients’ PDC is still being tracked for the pharmacy. Within the patient profile users are able to see a patient’s PDC score if they were measured for the Drug Category in the last 6 calendar months.

Calculation of High Risk Medications in Elderly Measure



Note:

The APS patient list for the HRM measure displays patients aged 60 years or older so that pharmacies can proactively work with their patients before they reach the age range (66 years or older) defined in the CMS guidelines.

The CMS description for High Risk Meds (HRM) is the percentage of patients 66 years or older who received two or more prescription fills for a high-risk medication during the measurement window. This calculation looks at the number of patients (age 66 years or older) who received at least two prescription fills on different dates of service for the same high-risk medication during the measurement window divided by the eligible population.

This APS score for HRM is either a 0 (“bad score”), for patients age 60 years or older who got two or more Rx fills for the same HRM, or 1 (“good score”), for patients age 60 or older who received no or less than two fills of the same HRM. The APS rating calculation takes the number of patients with a 0 score (age 66+) divided by the eligible population (age 66+), then multiplied by 100%.

The following table outlines how the APS Star Ratings are Calculated for HRM:



Note:

APS uses the rating scale to display a STAR Rating for High-Risk Medications published by CMS in 2017.

APS HRM Star Rating Cut Points % of Eligible Patients with At Least 2 HRM Fills in 12 Months	
Star Rating	HRM
1	>15%
2	>11% to ≤15%
3	>8% to ≤11%
4	>6% to ≤8%
5	≤6%

Statin Use in Persons with Diabetes (SUPD)

APS also measures Statin Use in Persons with Diabetes (SUPD). This measure monitors diabetic patients between the ages of 40 and 75 who were dispensed at least two medications for diabetes and tracks if they also received a statin medication within the same calendar year. With this measure, patients are either fully adherent (rating of 1), having received a statin, or fully non-adherent (rating of 0) if they have not. A diabetic patient would move from fully non-compliant to fully compliant on their first statin dispense.

CMS Star Rating cut points for SUPD are shown in the following table:

2022 Cut Points for SUPD % of Adherent Patients per Plan Measured	
Star Rating	SUPD
1	<77%
2	≥77% to <79%
3	≥79% to <82%
4	≥82% to <84%
5	≥84%

Chronic Obstructive Pulmonary Disease (COPD)



Note:

COPD adherence is available only to Clinical Programs Solution (CPS) Premium customers.

The COPD adherence measure identifies patients that have at least two fills for any long-acting Bronchodilator. A measured patient will have filled the same or a different long- acting Bronchodilator on different dates of service during the measurement window. Patients with at least one fill for a nebulized long-acting Bronchodilator during the measurement window will be excluded from COPD adherence tracking in APS.

Like other APS measures, COPD adherence will be measured by the proportion of days covered (PDC): the number of days covered by refills within a measurement window divided by the number of days in the measurement window. A patient’s COPD PDC is calculated based on refills over a 12-month or 6-month rolling period. If the patient’s PDC is 80% or more, the patient is considered adherent in APS, while if it is less than 80%, the patient will be considered non-adherent.

Chapter 2: Facility vs. Organization Information

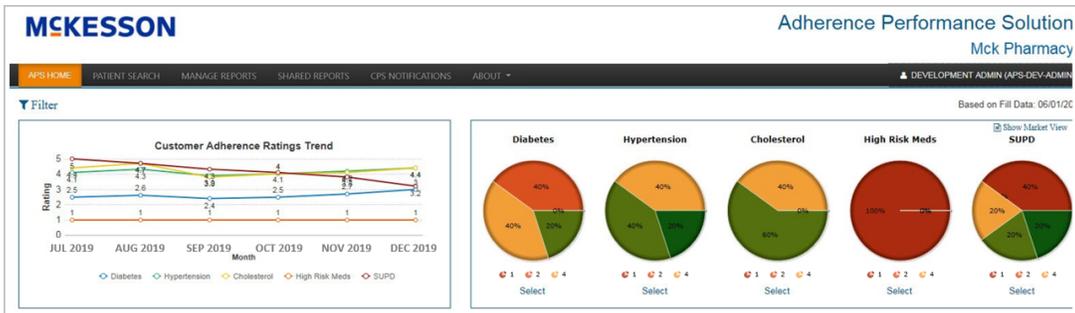
Ways to See Information by Using the Filter

- ["Viewing Facility vs. Organization Information" below](#)
 - ["Initial Login View" below](#)
 - ["Using the Filter to View Facility Information" below](#)
 - ["Using the Filter to Return to the Organization Information" on the next page](#)
 - ["How to View Facility Information through the Facility Summary Table" on the next page](#)

Viewing Facility vs. Organization Information

Initial Login View

When you log into the McKesson Adherence Performance Solution website, if you're logging into a multi-location pharmacy, information for your entire organization is displayed.

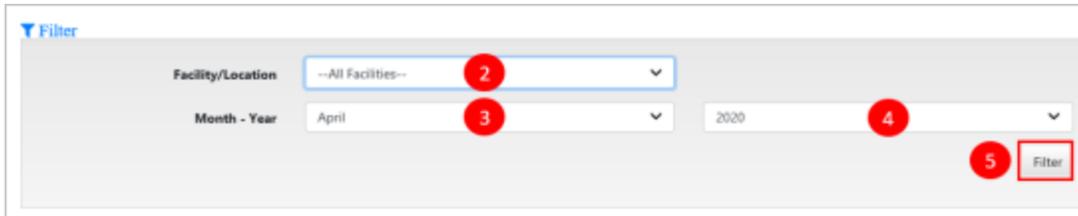


Using the Filter to View Facility Information

To change the view from organization to a single facility's:



1. Select the Filter icon. The Facility/Location section displays.



2. Select the drop-down arrow in the **Facility/Location** field to view a list of available facilities. Select a facility from the drop-down list.
3. Select the desired **Month** from the drop-down.
4. Select the desired **Year** from the drop-down.
5. Select the **Filter** button. Information for the single facility displays. The pharmacy location (name and number) is listed in the top right corner of the screen.



For a single facility, the adherence for each disease state, High Risk Meds, and SUDP is shown on a gauge. In this example, the facility has their highest ratings for Cholesterol and Hypertension, both with a 3.

Using the Filter to Return to the Organization Information

1. To view the entire organization again, select the Filter icon, select the drop-down arrow in the **Facility/Location** field and select **--All Facilities--**.
2. Select the desired **Month** from the drop-down.
3. Select the desired **Year** from the drop-down.
4. Select the **Filter** button.

How to View Facility Information through the Facility Summary Table

When looking at the organizational view, under the pie charts is the facility summary table.

Facility Id *	Diabetes Rating	Hypertension Rating	Cholesterol Rating	High Risk Meds Rating	SUPD Rating
2	3	5	4	1	3
5	2	4	4	1	1
7	2	3	3	1	1
8	4	3	3	1	4
9	3	4	4	1	5

This table displays the rating for each facility in your organization for each disease state, High Risk Meds and SUPD.

To change the view from organization to a single facility, select the Facility ID. Information for the single facility displays.

Facility Id *	Diabetes Rating	Hypertension Rating	Cholesterol Rating	High Risk Meds Rating	SUPD Rating
2	3	5	4	1	3
5	2	4	4	1	1
7	2	3	3	1	1
8	4	3	3	1	4
9	3	4	4	1	5



Chapter 3: Reading the Information

Ways to Utilize Information Contained in APS

- ["Reading the Customer Ratings Trends and Organizational Pie Charts" below](#)
 - ["Line Graphs vs. Pie Charts" below](#)
 - ["Reading the Data" on the next page](#)
 - ["Average Customer Ratings Trends Graph" on the next page](#)
 - ["Organizational Pie Charts" on the next page](#)
 - ["Comparing the Organization to the Market" on page 22](#)

Reading the Customer Ratings Trends and Organizational Pie Charts

Line Graphs vs. Pie Charts

The Customer Adherence Ratings Trend line graph displays an average of the organization’s facilities’ adherence rating trends by disease state (diabetes, hypertension, cholesterol, high risk medications, or SUPD) over a 6-month time frame. The Organization Pie Charts display the percentage of the organization’s locations that have achieved each rating (1-5) for each of the measures.



Notes:

- To hide a disease state’s trend (to make it easier to view other disease state trends), select the disease state’s icon at the bottom of the pane. For example, to view only SUPD, hide the other four disease state trends by selecting the icon to the left of “Diabetes,” “Hypertension,” “Cholesterol,” and “High Risk Meds.”

- Additionally, note that there is a color key below each pie chart. These color keys will only show if there is enough room in the browser window. To view the pie charts, expand the browser to full screen and zoom out. You can also hover over one of the pie charts and a tool tip will display with the Adherence rating and percentage for that section of the chart.

Reading the Data

Average Customer Ratings Trends Graph

In the example below, the organization as whole (average of all locations) has its lowest average adherence ratings for SUPD (3.2) in December 2019 and Cholesterol (3.8) in September 2019.

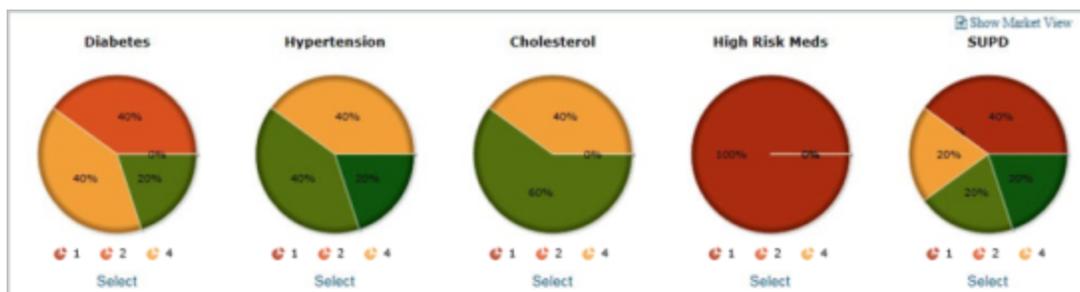
High Risk Meds refer to patients 65 or older with two or more fills of a medication on the CMS High Risk Medication list.



Organizational Pie Charts

In the example below, the organization as whole has 20.0 percent of its facilities at adherence rating 2, 40.0 percent at rating 3, 20.0 percent at rating 4, and 0.0 percent at rating 1 or 5 for Diabetes. Hypertension adherence has better ratings with 0.0 percent at rating 1 or 2, 40.0 percent at rating 3, 40 percent at rating 4, and 20 percent at rating 5. The plan for this organization should be to evaluate the specific pharmacy locations and set improvement goals.

They need to improve their ratings to have more locations achieving adherence ratings of 4 and 5.



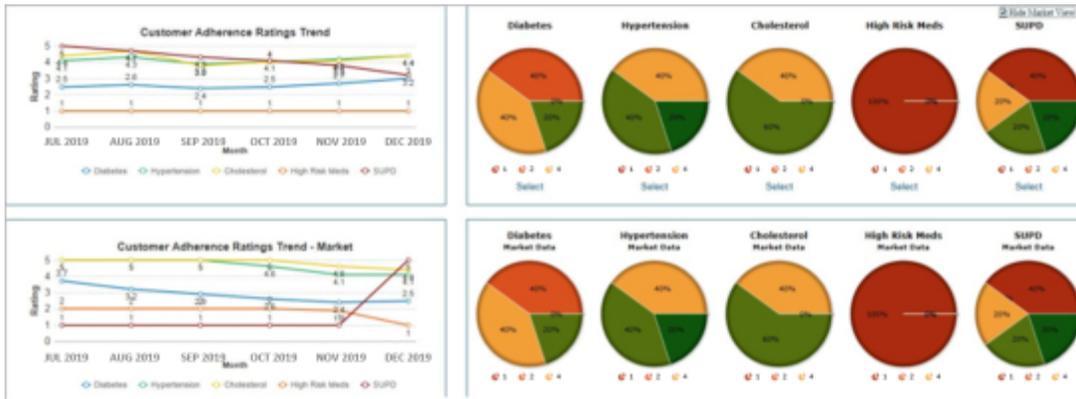
Comparing the Organization to the Market

The McKesson Adherence Performance Solution website allows you to view your organization’s ratings and compare them to the market as a whole. The market comparison information is provided for and represents customers that are members of the MPS&A data community.

Select **Show Market View** in the top right of the pie chart pane.



The market view displays:



This allows you to compare your organization’s average adherence ratings directly to the market in general.

Chapter 4: Identifying Target Patients

Ways to Identify Target Patients

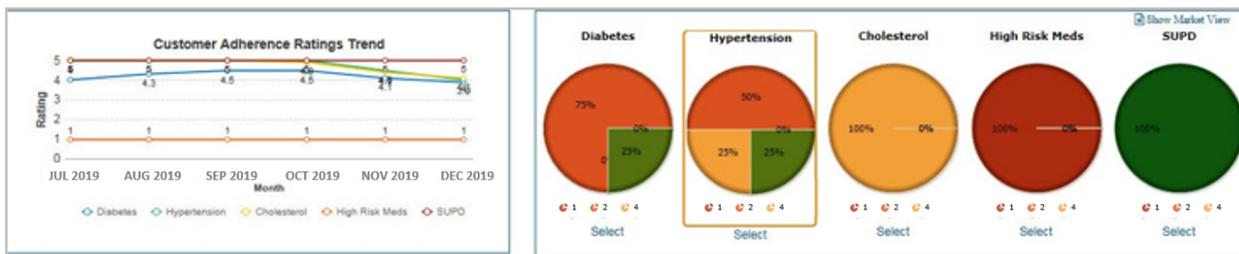
- ["Identifying Target Patients" below](#)
 - ["Using the Pie Charts" below](#)
 - ["The Patient Profile" on the next page](#)
 - ["Patient Statistics" on page 25](#)
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 - ["Patient Notes and Review" on page 28](#)
 - ["Gap Analysis and Trending" on page 34](#)
 - ["Fill Details" on page 35](#)
 - ["Patient Search" on page 36](#)

Identifying Target Patients

Using the Pie Charts

To identify potential Target Patients using the Pie Charts:

1. Select the **Select** button under the desired disease state pie chart.



Details about the organization’s adherence rating for that disease state display.

Patient Name	Rx Number	PDC 12-Mo	PDC 6-Mo	Plan EIn	Plan Code	Plan Group	Last Sold Date	Patient Phone	Birth Date	Days Since Review	Follow Up Date
Rebecca BLACK	1427226	0.83	0.72	202436	1177307	Group 32	10/15/2017	2090061999	01/11/1954	9,999	
Adam WEAVER	1903490	0.83	0.84	160379	1111412	Group 5177	11/23/2017	207996979	09/17/1980	9,999	
Elizabeth RICHARDS	3095441	0.83	0.84	161993	126065	Group 3735	11/30/2017	2041011807	02/26/1959	9,999	
Jaime SPENCER	3259859	0.83	0.77	102793	1107909	Group 3873	12/17/2017	2041011807	10/14/1976	9,999	
Ashon BELL	3468711	0.83	0.80	196348	1075392	Group 5913	12/06/2017	2063114154	02/02/1977	9,999	
Libby LITTLE	4588306	0.83	0.83	125040	1123492	Group 6450	09/18/2017	2093168540	06/29/1947	9,999	
Harvey WILLIAMSON	5224147	0.83	0.69	161993	1108961	Group 3061	11/25/2017	2078196139	03/07/1959	9,999	
George SCOTT	5533999	0.83	0.73	111785	1234901	Group 5510	11/19/2017	2067245140	05/05/1963	9,999	
Edward REED	5557518	0.83	0.66	160379	1086193	Group 5272	11/12/2017	2073095232	12/29/1946	9,999	
Ethan PALMER	5654897	0.83	1.00	126369	1034101	Group 32	10/03/2017	2020202918	01/09/1947	9,999	

2. In the **Patients** tab, you can compare the patient's 6-12 month PDC to see whether the patient's adherence is increasing, staying the same, or decreasing.
3. If you wanted to contact a non-adherent patient, or a patient who's adherence is decreasing to learn why they are not filling their prescriptions, select the patient's name to open their patient profile.

The Patient Profile

The patient profile provides a single place to review all areas of a patient. This profile can be accessed by selecting the patient in the target patient list or by selecting the patient from Patient Search.



Note:

COPD information on the patient profile will only display to Clinical Programs Solution (CPS) Premium customers. For information on CPS Premium, contact your Account Manager or Account Executive.

Name: Hannah ABBOTT **City:** Louisville **Phone:** 2110687502
DOB: 04/12/1941 - 78 years old **State:** KY **Reviewed:**

Patient Statistics (PDC over 12 Months)

1 ——— 0.92 ↑
CHOLESTEROL **COPD**

Patient Notes New

There are no patient notes.

Patient Handout **Follow Up Date** **Patient Reviewed**

Facility	Rx Number	Plan Group	Sold Date	Days Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

Showing 1 to 2 of 2 entries Previous Next

Patient Statistics

The Patient Statistics section provides an overview of how the patient is doing in each of the measured areas where they have medication fills. For each disease state, there are two items:

- **Score:** This is the calculated adherence score for the patient in the selected disease state.
- **Arrow:** An **up arrow**, **down arrow**, or **flat line** shows if the patient has gone up, down, or stayed the same since the measurement in the previous month.



Important:

According to the PQA’s exclusion criteria, patients with specific medical conditions should be excluded from certain measures. APS does not apply some exclusion criteria. The message “Some PQA exclusion criteria not applied” displays with the **Patient Statistics**, when exclusion criteria was not applied. Please refer to ["Exclusion Criteria" on page 12](#) for additional information.

Patient Handout

The Patient Handout allows you to easily print graphical information on a given patient's adherence. Selecting the **Patient Handout** button opens a new Web browser tab. You can print this handout by selecting the **Print** button. Your browser's print dialog will appear.

Additionally, you can enter any notes you wish to appear on the printout in the **Notes by Pharmacist** field. To save any notes you entered on the handout, select the **Save Note to APS on Close?** checkbox. These notes will be saved to the **Patient Notes** section (with a note type of Patient Print Out).

Select the **Close** button when you are finished printing to close the tab.

COPD information on the patient handout will display to Clinical Programs Solution (CPS) Premium customers only. By default, the COPD drug category will be included on the patient handout for those customers, but can be removed by deselecting the checkbox highlighted in red in the example below.

**Note:**

For information on CPS Premium, contact your Account Manager or Account Executive.

Patient Profile: Hannah ABBOTT 01/24/2020
 DOB: 04/12/1941 City: Louisville State: KY

Patient Medication Adherence						
	AUG 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019	JAN 2020
Bronchodilators 92% *	[Coverage]		[Gap]	[Coverage]	[Coverage]	[Coverage]
Cholesterol 100% *	[Coverage]	[Coverage]			[Coverage]	[Coverage]

Gap Coverage

* The % score indicates the proportion of days over a 6-month period when patient had medication on hand, based on prescription fill history.

Include Bronchodilators (COPD) on Handout

Notes by Pharmacist:

Add a note--1000 character limit

Save Note to APS on Close?

Follow Up Date

The **Follow Up Date** field allows you to specify a date on which you want to check back in with a given patient on their medication adherence. Selecting this field opens a calendar widget where you can easily select the desired date.

Name: Hannah ABBOTT **City:** Louisville **Phone:** 2110687502
DOB: 04/12/1941 - 78 years old **State:** KY **Reviewed:**

Patient Statistics (PDC over 12 Months)

1 ——— 0.92 ↑
CHOLESTEROL **COPD**

Patient Notes New

There are no patient notes.

Follow Up Date follow up date (MM/DD/YY)

February 2020

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Facility	Rx Number	Group	Days	Drug	Prescriber Name
5 Fort Worth	8382238-1			ICORT AER 60-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019 30	SPIRIVA CAP HANDHLR	FOWLER (DEA 1208775)

Showing 1 to 2 of 2 entries Previous Next



Note:

The **Reviewed** date will update to the current date as soon as a follow-up date is specified. See the following section, **Patient Notes and Review**, for more information on reviewing patients.

Patient Notes and Review

Patient Notes allow you to capture comments and communication with the patient. In addition to comments, the method of communication can also be captured.

To add a Patient Note:

Name: Hannah ABBOTT **City:** Louisville **Phone:** 2110687502
DOB: 04/12/1941 - 78 years old **State:** KY **Reviewed:** 1



Patient Notes New

There are no patient notes.

Patient Handout **Follow Up Date** **Patient Reviewed**



Facility	Rx Number	Plan Group	Sold Date	Days Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

Showing 1 to 2 of 2 entries Previous Next

1. Select the **New** button.

The screenshot shows a patient record for Hannah ABBOTT, Louisville, KY. The interface includes a 'Patient Statistics' section with a 'CHOLESTEROL' value of 1 and a 'COPD' value of 0.92. A 'Patient Notes' section is visible with a 'New' button. A dropdown menu is open, showing options: EMR / EHR, Email, Fax, In-Person, Literature Drop, Mail, Misc, Patient Print Out, and Phone. A red circle with the number '2' is placed over the dropdown menu. Below the notes section are two bar charts showing 'Days' over months from 2019-Feb to 2020-Jan, with a legend for 'Coverage' and 'Gap'. At the bottom is a table of prescriptions.

Facility	Rx Number	Plan Group	Sold Date	Days Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

2. Use the drop-down in the **--Select Note Type--** field to see the types of notes that are available. Select the appropriate type.

Name: Hannah ABBOTT **City:** Louisville **Phone:** 2110687502
DOB: 04/12/1941 - 78 years old **State:** KY **Reviewed:**

Patient Statistics (PDC over 12 Months)

1 — **0.92** ↑
CHOLESTEROL **COPD**

Patient Notes New

--Select Note Type--

02/07/2020

Add a new note--1000 character limit

3

Add

Patient Handout **Follow Up Date**

Facility	Rx Number	Plan Group	Sold Date	Days Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

Showing 1 to 2 of 2 entries Previous Next

3. Add the note. There is a 1000 character limit.

Name: Hannah ABBOTT **City:** Louisville **Phone:** 2110687502
DOB: 04/12/1941 - 78 years old **State:** KY **Reviewed:**

Patient Statistics (PDC over 12 Months)

1 — 0.92 ↑
CHOLESTEROL **COPD**

Patient Handout **Follow Up Date** for

Patient Notes New

--Select Note Type--

02/07/2020

Add a new note--1000 character limit

4 **Add**

Facility	Rx Number	Plan Group	Sold Date	Days Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

Showing 1 to 2 of 2 entries Previous Next

4. Select the **Add** button to save the note.

To edit existing notes:

The screenshot displays a patient profile for Hannah ABBOTT, Louisville, KY. The 'Patient Notes' section is active, showing a list of notes. A red box highlights a note from 2020-02-07 with the text 'Smith Pharmacy Report - (Email) Please stop in for your prescription'. An arrow points from this note to the 'Patient Notes (Edit/Delete)' dialog box. In this dialog, a red box highlights the 'Email' dropdown menu, the date '02/07/2020', and the text 'Please stop in for your prescription'. A red circle highlights the 'Save Changes' button. Below the dialog, a table shows two entries for prescriptions.

Facility	Rx Number	Plan Group	Sold Date	D Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

1. Select the note to edit from the list of notes. The **Patients Notes (Edit/Delete)** dialog window will open.
2. Make the desired edits. You can select a new note type and/or enter any desired changes in the text box.
3. Select the **Save Changes** button to save your edits. To delete a note, select the **Delete Note** checkbox and select the **Save Changes** button, or select the **Cancel** button to discard your edits.



Note:

When a note is edited, the date the edits were made, in addition to the user name of the user who made the edits, is displayed in the Patient Profile and the note is moved to the top of the list.

When a patient has been contacted, they can now be marked as reviewed by selecting the **Patient Reviewed** button. This sets a **Reviewed** date associated with the patient, which can be used to decide when to contact the patient again. This date is utilized in the target patients list to calculate the **Days Since Review** value. After marking a patient as reviewed, the **Days Since Review** value in the target patients list will automatically refresh to reflect the new date.

Patient Name	Rx Number	PDC 12-Mo	PDC 6-Mo	Plan Bin	Plan Code	Plan Group	Last Sold Date	Patient Phone	Birth Date	Days Since Review	Follow Up Date
Hanna ABBOTT	1045722	0.83	0.62	111785	1134887	Group 3706	12/18/2019	2829967114	03/19/1967	50	02/21/2020
Andy MORGAN	1263111	0.83	0.99	111785	1080111	Group 3620	01/30/2020	2103417967	03/11/1967	9	03/17/2020
Louis BARTON	2257870	0.83	0.82	125848	1126450	Group 6458	01/13/2020	2964417218	02/14/1951	25	02/25/2020
Laura STANLEY	2619090	0.83	0.88	160379	1111452	Group 3677	01/10/2020	2828561334	05/01/1968	28	02/28/2020
Natalie HUDSON	2782190	0.85	0.99	161995	1188961	Group 3361	01/31/2020	2871881805	04/26/1968	9	03/17/2020

The icons to the right of the column names can be used to sort the table in ascending or descending order, based on the column selected.



Note:

If a patient has never been flagged as reviewed, the **Days Since Review** value will display as 9,999.

Gap Analysis and Trending

The Gap Analysis provides a way to visually review when and for how long patients are missing medication fills. It displays the number of days per month that were covered and the number of days that were considered a gap in coverage.

Name: Hannah ABBOTT **City:** Louisville **Phone:** 2110687502
DOB: 04/12/1941 - 78 years old **State:** KY **Reviewed:**

Patient Statistics (PDC over 12 Months)

1 **CHOLESTEROL** 0.92 **COPD**

Patient Notes New
 There are no patient notes.

Patient Handout **Follow Up Date** follow up date (MM/DD/YY) **Patient Reviewed**

Facility	Rx Number	Plan Group	Sold Date	Days Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

Showing 1 to 2 of 2 entries Previous Next

Fill Details

The Fill Details section provides information on each specific fill to assist in researching patient fill activity.

Name: Hannah ABBOTT **City:** Louisville **Phone:** 2110687502
DOB: 04/12/1941 - 78 years old **State:** KY **Reviewed:**

Patient Statistics (PDC over 12 Months)

1 CHOLESTEROL 0.92 COPD

Patient Notes New
 There are no patient notes.

Patient Handout **Follow Up Date** follow up date (MM/DD/YY) **Patient Reviewed**

Facility	Rx Number	Plan Group	Sold Date	Days Supply	Drug	Prescriber Name
5 Fort Worth	8382238-1	Group 5515	11/26/2019	30	SYMBICORT AER 160-4.5	FOWLER (DEA 1208775)
5 Fort Worth	5216875-2	Group 5515	10/22/2019	30	SPIRIVA CAP HANDIHLR	FOWLER (DEA 1208775)

Showing 1 to 2 of 2 entries Previous Next

Patient Search

Patient Search allows users to find patients by name or by Rx Number. This feature can be accessed from any screen by selecting **Patient Search** in the navigation bar.

Within the Patient Search screen, a patient can be searched in one of two ways:

- **Patient Details:** This includes the patient’s first and last name as well as their birth date. If selecting the **Exact Match** checkbox for a field, only patients that exactly meet the entered value will be returned. If you do not use these checkboxes, any names that include the value entered in the field will be returned.
- **Rx Details:** The Rx Number and Store Number can be entered to find a specific patient.

Patient Search

Last Name Exact Match **Rx Number**

First Name Exact Match **Store Number**

Birth Date

Chapter 5: Creating An Adherence Plan

Key Concepts in Creating an Adherence Plan

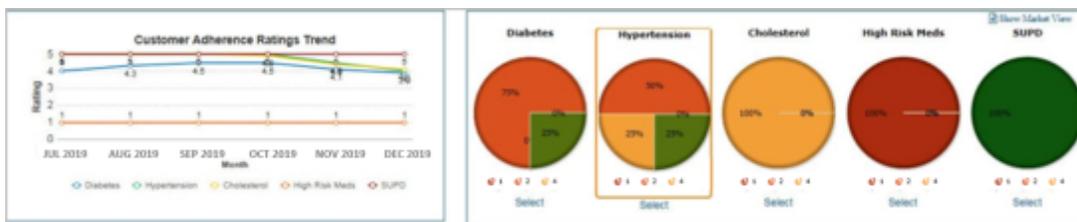
- ["Reading the Customer Ratings Trends and Organizational Pie Charts" on page 39](#)
 - ["Creating a Plan" on page 39](#)
 - ["Reading the Customer Ratings Trends and Organizational Pie Charts" on page 39](#)
 - ["Prescribers View" on page 41](#)
 - ["Plans and Plan Groups" on page 41](#)
 - ["Reading the Data" on page 42](#)
 - ["Using Filters and Sorts" on page 42](#)
 - ["Exporting the Data" on page 43](#)
 - ["Scope of Control" on page 44](#)

Reading the Customer Ratings Trends and Organizational Pie Charts

Creating a Plan

To begin creating a plan, determine which disease(s) that you will be creating a plan for.

1. In the Organization level view, select the **Select** button under the desired disease state pie chart.



The Patient Detail Table will appear.

Patients											
Patients with Coverage in the Past 90 Days											
Patient Name	Rx Number	PDC 12-Mo	PDC 6-Mo	Plan Bin	Plan Code	Plan Group	Last Sold Date	Patient Phone	Birth Date	Days Since Review	Follow Up Date
Rebecca BLACK	1427226	0.83	0.72	202436	1177307	Group 32	10/15/2017	2090061999	07/11/1954	9,999	
Adam WEAVER	1860490	0.83	0.84	160379	1111412	Group 5177	11/22/2017	2079960979	09/17/1980	9,999	
Mariah HOWE	2836898	0.83	0.83	111785	1138459	Group 447	11/14/2017	2041011807	01/21/1953	9,999	
Elizabeth RICHARDS	3055441	0.83	0.84	161993	1226065	Group 3735	11/30/2017	2041011807	02/26/1959	9,999	
Jasmine SPENCER	3256859	0.83	0.77	102793	1107009	Group 3873	12/17/2017	2041011807	10/14/1976	9,999	
Ashlon BELL	3468711	0.83	0.80	196348	1075392	Group 5913	12/06/2017	2063114154	02/02/1977	9,999	
Libby LITTLE	4586306	0.83	0.63	125948	1123492	Group 6459	09/18/2017	2093168548	08/28/1947	9,999	
Harvey WILLIAMSON	5224147	0.83	0.69	161993	1108961	Group 3061	11/25/2017	2078198139	03/07/1959	9,999	
Edward REED	5557518	0.83	0.66	160379	1096193	Group 5272	11/12/2017	2073095232	12/28/1948	9,999	
Alyssa HOLLAND	5643115	0.83	0.66	102793	1047546	Group 1055	11/02/2017	2042338621	11/27/1948	9,999	

Showing 1 to 10 of 3,525 entries

- The Detail Table allows you to see patient fill/gaps and facility/plan/groups thresholds to allow you to plan how to improve your adherence ratings. Information provided on the **Patients** Tab includes:
- Prescription number
- 12 and 6 month PDC
- Plan Bin
- Plan Code
- Plan Group
- Last Sold Date
- Patient Phone
- Birth Date
- Days Since Review
- Follow Up Date

When deciding which patient to target, those with a higher 12 and 6 month PDC (Proportion of Days Covered) may be easier to bring into adherence because they are closer to being adherent. See Identifying Target Patients for more information.

2. Select the **Facilities** Tab to view (for each of the organization’s facilities):
 - Adherence rating for that disease state
 - Number of patients tracked at that facility
 - Number of Adherent patients at that facility

- Additional number of patients needed to get to the next adherence rating
- Additional number of patients needed to get to the highest adherence rating

Facility Id	Adherence Rating	Measured Patients	Adherent Patients	Percent Adherent Patients	Next Rating Target Patients	Highest Rating Target Patients
2	2	7,350	5,859	79.71	21	389
5	2	10,927	8,498	77.77	244	790
7	3	7,914	6,413	81.03	156	314
8	4	3,057	2,595	84.89	4	4

Reading the Data

In the example above, facility 2 is at adherence rating 2 for the disease state hypertension. To get to adherence rating 3, the facility would need 21 more patients to be adherent. To get to adherence rating 5, the facility would need 389 more patients to be adherent.

Facility 8 is at adherence rating 4 for the disease state hypertension. To get to adherence rating 5, the facility would need 4 more patients to be adherent.

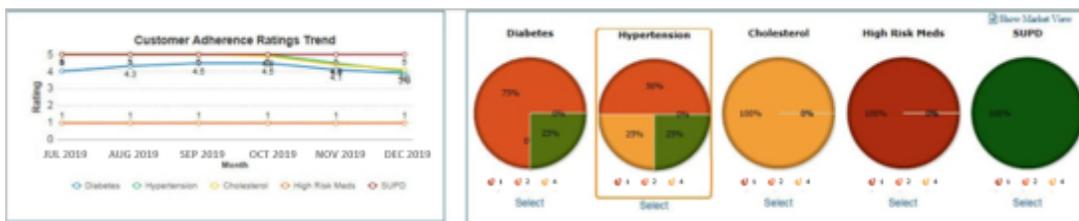
This report allows the organization to set specific goals for individual pharmacy locations. If the organization wanted to focus on bringing the facilities closest to adherence rating 5 up to that rating 5, they might focus on the 4 patients in facility 8 before focusing on the adherence of 389 at facility 2.

Reading the Customer Ratings Trends and Organizational Pie Charts

Creating a Plan

To begin creating a plan, determine which disease(s) that you will be creating a plan for.

1. In the Organization level view, select the **Select** button under the desired disease state pie chart.



The Patient Detail Table will appear.

Patients											
Patients with Coverage in the Past 90 Days											
Patient Name	Rx Number	PDC 12-Mo	PDC 6-Mo	Plan Bin	Plan Code	Plan Group	Last Sold Date	Patient Phone	Birth Date	Days Since Review	Follow Up Date
Rebecca BLACK	1427226	0.83	0.72	202436	1177307	Group 32	10/15/2017	2090061999	07/11/1954	9,999	
Adam WEAVER	1860490	0.83	0.84	160379	1111412	Group 5177	11/22/2017	2079960979	09/17/1980	9,999	
Mariah HOWE	2836898	0.83	0.83	111785	1138459	Group 447	11/14/2017	2041011807	01/21/1953	9,999	
Elizabeth RICHARDS	3055441	0.83	0.84	161993	1226065	Group 3735	11/30/2017	2041011807	02/26/1959	9,999	
Jasmine SPENCER	3256859	0.83	0.77	102793	1107009	Group 3873	12/17/2017	2041011807	10/14/1976	9,999	
Ashlon BELL	3468711	0.83	0.80	196348	1075392	Group 5913	12/06/2017	2063114154	02/02/1977	9,999	
Libby LITTLE	4586306	0.83	0.63	125948	1123492	Group 6459	09/18/2017	2093168548	08/28/1947	9,999	
Harvey WILLIAMSON	5224147	0.83	0.69	161993	1108961	Group 3061	11/25/2017	2078198139	03/07/1959	9,999	
Edward REED	5557518	0.83	0.66	160379	1096193	Group 5272	11/12/2017	2073095232	12/28/1948	9,999	
Alyssa HOLLAND	5643115	0.83	0.66	102793	1047546	Group 1055	11/02/2017	2042338621	11/27/1948	9,999	

- The Detail Table allows you to see patient fill/gaps and facility/plan/groups thresholds to allow you to plan how to improve your adherence ratings. Information provided on the **Patients** Tab includes:
- Prescription number
- 12 and 6 month PDC
- Plan Bin
- Plan Code
- Plan Group
- Last Sold Date
- Patient Phone
- Birth Date
- Days Since Review
- Follow Up Date

When deciding which patient to target, those with a higher 12 and 6 month PDC (Proportion of Days Covered) may be easier to bring into adherence because they are closer to being adherent. See Identifying Target Patients for more information.

2. Select the **Facilities** Tab to view (for each of the organization’s facilities):
 - Adherence rating for that disease state
 - Number of patients tracked at that facility
 - Number of Adherent patients at that facility

- Additional number of patients needed to get to the next adherence rating
- Additional number of patients needed to get to the highest adherence rating

Facility Id	Adherence Rating	Measured Patients	Adherent Patients	Percent Adherent Patients	Next Rating Target Patients	Highest Rating Target Patients
2	2	7,350	5,859	79.71	21	389
5	2	10,927	8,498	77.77	244	790
7	3	7,914	6,413	81.03	156	314
8	4	3,057	2,595	84.89	4	4

Showing 1 to 4 of 4 entries

Reading the Data

In the example above, facility 2 is at adherence rating 2 for the disease state hypertension. To get to adherence rating 3, the facility would need 21 more patients to be adherent. To get to adherence rating 5, the facility would need 389 more patients to be adherent.

Facility 8 is at adherence rating 4 for the disease state hypertension. To get to adherence rating 5, the facility would need 4 more patients to be adherent.

This report allows the organization to set specific goals for individual pharmacy locations. If the organization wanted to focus on bringing the facilities closest to adherence rating 5 up to that rating 5, they might focus on the 4 patients in facility 8 before focusing on the adherence of 389 at facility 2.

Prescribers View

The **Prescribers** View provides a new view of the data by showing aggregated patient details by prescriber. This allows users to easily see how each prescriber is performing and creates an opportunity to partner with the prescriber to improve patient adherence.

Prescriber Name	Measured Patients	Adherent Patients	Percent Adherent Patients	Next Rating Target Patients	Highest Rating Target Patients
ABBOTT (DEA 1042033)	1	0	0	1	1
ABBOTT (DEA 1096426)	4	2	50	1	1
ABBOTT (DEA 1130891)	1	0	0	1	1
ABBOTT (DEA 1136222)	2	2	100	0	0
ADAMS (DEA 1034899)	1	1	100	0	0

Plans and Plan Groups

In addition to facility details, you can also view **Plan** or **Plan Group** details to assist decisions about how best to raise your organization’s ratings.

PATIENTS FACILITIES PLANS PLAN GROUPS PRESCRIBERS

Plans

Items Per Page 15 Report Actions

Plan Name	Bin	Code	PCN	Total Patients	Patients Measured	Adherent Patients	Percent Adherent Patients	Next Rating Target Patients	Highest Rating Target Patients
Plan 1303	130107	120084	1107473	135	8	7	87.50	0	0
Plan 1303	102793	1027260	1119634	108	8	8	100.00	0	0
Plan 1353	118023	1183358	1240762	34	2	2	100.00	0	0
Plan 1379	143227	1009702	1075484	4	1	0	0.00	1	1
Plan 1392	141865	1146309	1064257	8	1	0	0.00	1	1
Plan 1394	183130	1237983	1187301	7	1	1	100.00	0	0
Plan 1114	180379	1195267	1067183	2,466	227	165	72.69	10	28
Plan 116	215821	1151249	1119694	5	3	2	66.67	1	1
Plan 1171	180900	1154881	1132007	18	2	0	0.00	2	2
Plan 1171	111785	1034847	1141511	1	1	0	0.00	1	1

Showing 1 to 10 of 303 entries

Previous Next

Under the **Plans** tab, you can select a Plan Name to view details by Benefit Groups within that plan.

PATIENTS FACILITIES PLANS PLAN GROUPS PRESCRIBERS

Plans > Plan Groups

Items Per Page 15 Report Actions

Plan Name	Benefit Group	Bin	Code	Plan PCN	Total Patients	Patients Measured	Adherent Patients	Percent Adherent Patients	Next Rating Target Patients	Highest Rating Target Patients
Plan 1114	Group 136	180079	1195267	1097183	206	33	27	81.82	1	2
Plan 1114	Group 2011	180079	1195267	1097183	3	2	2	100.00	0	0
Plan 1114	Group 2052	180079	1195267	1097183	1	1	0	0.00	1	1
Plan 1114	Group 3354	180079	1195267	1097183	1	1	0	0.00	1	1
Plan 1114	Group 3905	180079	1195267	1097183	24	2	2	100.00	0	0
Plan 1114	Group 3439	180079	1195267	1097183	9	2	2	100.00	0	0
Plan 1114	Group 653	180079	1195267	1097183	14	1	0	0.00	1	1
Plan 1114	Group 1395	180079	1195267	1097183	3	1	0	0.00	1	1
Plan 1114	Group 2076	180079	1195267	1097183	2	1	1	100.00	0	0
Plan 1114	Group 2112	180079	1195267	1097183	2	1	1	100.00	0	0

Showing 1 to 10 of 101 entries

Previous Next

Reading the Data

In the example above, for the selected plan, Benefit Group 136 has 33 patients measured, and 27 patients are adherent. The pharmacist would work with one patient in the group to bring the group up a rating or two patients to bring the group to the highest rating.

Using Filters and Sorts

APS now allows users to apply and save filters and sorts for target lists (Patients, Facilities, Plans, Plan Groups, and Prescribers). Select **Filters and Sorts** from the **Report Actions** drop-down menu. To create a filter, enter the desired search criteria and select the **Apply** button. To create a sort, use the arrows next to each column in the target list. To clear the search fields and reset the report sorts, select the **Clear** button. To save a filter and sort configuration, select the **Save** button. To delete a saved filter and sort configuration, select the **Delete** button.



Note:

Filters and sorts persist across disease states but each tab (Patients, Facilities, Plans, Plan Groups, Prescribers) has its own filter and sort configuration. This means that you can have five filter and sort configurations, one for each tab, but these filters stay the same on those tabs when you switch between the disease states. Your saved filter and sort for a given tab is used by default the next time you visit that tab.

Exporting the Data

You can export data to Excel using the **Export Filtered**, **Export All Patients**, or **Export All Patients with Notes** options on the **Report Actions** drop-down menu (accessible from any of the target lists for the selected drug category).

- Use **Export Filtered** to export the data for the current target list you are viewing. If you have applied a filter, only the filtered data is exported.
- Use **Export All Patients** to export all available data for all patients (including adherent patients) for the disease state.
- Use **Export All Patients with Notes** to export all available data for all patients, including their patient notes. Note that the exported data displays the most recent three notes per patient and only notes created within the past 12 months are included.

Patient ID	Name	Age	Sex	Race	Primary Care Physician	Specialty	Facility	Admission Date	Discharge Date	Admission Type	Admission Status	Admission Reason	Admission Location	Admission Source	Admission Date	Admission Time	Admission Location	Admission Source
1000000001	John Doe	65	M	W	Dr. Smith	Internal Medicine	Facility A	2021-01-01	2021-01-05	Elective	Admitted	Medical	Facility A	Facility A	08:00	Facility A	Facility A	
1000000002	Jane Smith	45	F	W	Dr. Jones	Obstetrics/Gynecology	Facility B	2021-02-15	2021-02-20	Emergency	Admitted	Medical	Facility B	Facility B	14:00	Facility B	Facility B	

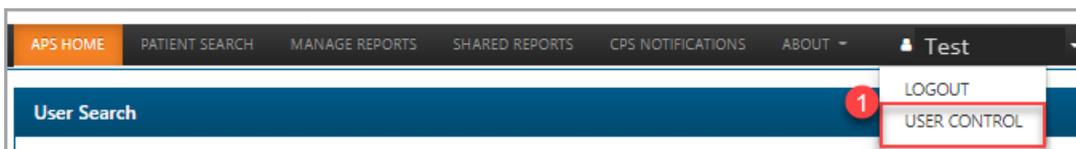
Note that the ability for a user to export/print data is set by a right (by an admin user). For more information, refer to "[Scope of Control](#)" below.

Scope of Control

Scope of control in APS allows admin users (users with the APS-CUSTOMER-ADMIN role) to assign or restrict privileges for non-admin users (users with the APS-CUSTOMER-REPORT role). Admin users can define which users can view information for different facilities and if these users can export and/or print reports. Admin users can also add or remove users.

To assign or restrict privileges:

1. Select **User Control** from the user drop-down menu in the upper right corner of the screen



2. In the **Users Available** table, select the **User ID** of the user you want to establish settings for.

User Search

Add User

Users Available

Search:

User Id	User Name	Remove User Name	Company	Last Login Date
744	Test User	Delete	Chain	2018-06-07
886	Test User	Delete	Chain	2020-06-13
390	Test User	Delete	Chain	2021-01-07
724	Test User	Delete	Chain	2018-01-10
709	Test User	Delete	Chain	2018-02-09
705	Test User	Delete	Chain	2018-06-12
784	Test User	Delete	Chain	2020-10-26
704	Test User	Delete	Chain	2020-06-13
708	Test User	Delete	Chain	2021-01-20
706	Test User	Delete	Chain	2021-01-05

Showing 1 to 10 of 27 entries

Previous Next

3. In the **User Details** section, select/deselect the **Export Report** and **Print Report** checkboxes.

User Details

User Name: Company: Last Login Date:

User Rights ³

Export Report

Print Report

User Facilities ⁴

If there are no facilities selected for an authenticated APS user, then that user has unrestricted access to all the facilities of the customer. This is the default setting before User Control restrictions are applied.

Facility Id	Facility Name	Default	Available
11	11 11	<input type="checkbox"/>	<input type="checkbox"/>
12	12 12	<input type="checkbox"/>	<input type="checkbox"/>
2	2 Fort Worth	<input type="checkbox"/>	<input type="checkbox"/>
5	5 Fort Worth	<input type="checkbox"/>	<input type="checkbox"/>
7	7 Columbus	<input type="checkbox"/>	<input type="checkbox"/>
8	8 Detroit	<input type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 6 of 6 entries

Select All UnSelect All

Cancel

The Export Report permission grants or denies access to the **Report Actions > Export Filtered** feature. This feature allows you to export an Excel spreadsheet of the currently displayed report (Patients, Facilities, Plans, Plan Groups, or Prescribers) with any sorts and filters specified by the user. For more information, see “Exporting the Data.”

The Print Report permission grants or denies access to the **Report Actions > Print Screen** feature. This feature formats one page of the current report in a simple table for printing.

4. In the **User Facilities** table, assign a default facility for the user by selecting the checkbox for that facility in the **Default** column. Each user must have a default facility. When users log in to the system, they will see information related to this default facility. Use the checkboxes in the **Available** column to define the facilities the user can access.



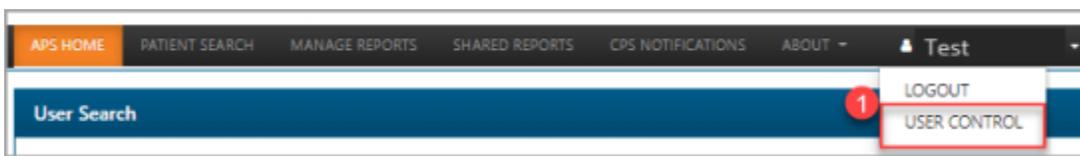
Note:

If no store is selected, then the user will have access to all reports and all stores including print/export.

5. Select the **Save** button to save any changes.

To add or remove users:

1. Select **User Control** from the user drop-down menu in the upper right corner of the screen.



2. To add a new user, enter the desired user name in the text box next to the **Add User** button, then either select the button or press the **Enter** key on the keyboard.



3. To remove a user, select **Delete** in the **Remove User Name** column for the user you want to remove.

User Search

Add User

Users Available Search:

User Id	User Name	Remove User Name	Company	Last Login Date
744	Test User	Delete	Chain	2018-06-07
886	Test User	Delete	Chain	2020-06-13
390	Test User	Delete	Chain	2021-01-07

Chapter 6: Enhanced Patient List Reports

Key Concepts in Enhanced Patient List Reports

- ["Enhanced Patient List Reports" on the next page](#)
 - ["Internet Explorer® 11 Settings" on the next page](#)
- ["Report Types" on page 49](#)
- ["Adding a Report" on page 51](#)
 - ["Custom Report" on page 52](#)
 - ["PDC Delta Report" on page 53](#)
 - ["User Login Report" on page 54](#)
- ["Report Criteria for Custom Reports" on page 54](#)
 - ["Available/Selected Columns" on page 54](#)
 - ["Year to Date Calculations" on page 55](#)
 - ["Point of No Return" on page 56](#)
 - ["Coverage Days Needed for Year" on page 56](#)
 - ["Year to Date PDC" on page 56](#)
 - ["Is Adherent for Year" on page 57](#)
 - ["Is Non-Adherent for Year" on page 57](#)
- ["PDC Parameters for PDC Delta Reports" on page 57](#)
 - ["The PDC Parameters" on page 58](#)
 - ["Add, Edit and Delete Filters" on page 58](#)
 - ["Number Data Type" on page 59](#)
 - ["Date Data Type" on page 61](#)
 - ["Date Data Type" on page 61](#)
 - ["Drug Class Data Type" on page 62](#)
- ["Saving Updated Reports" on page 63](#)
- ["Editing Existing Reports" on page 63](#)
- ["Viewing Reports Online" on page 64](#)
- ["Downloading Results to an Excel® Spreadsheet" on page 65](#)

- ["Deleting Reports" on page 67](#)

Enhanced Patient List Reports

The enhanced Patient List Report functionality provides the user with the ability to create, edit and view patient list reports online, as well as download the results into a Microsoft® Excel® spreadsheet. In addition, the user can apply filters in order to produce reports that contain the desired results.

The Manage Reports and Shared Reports features allow appropriate users to create customized reports selecting from all pharmacy patients who have measures in the past year for the six drug classes reported by APS. COPD measurements are available to CPS Premium customers only. Users can select which patients they want to report based on criteria such as PDC ranges, plan attributes, facility ids, follow up date, etc. Any of the available columns can be used to filter patients.

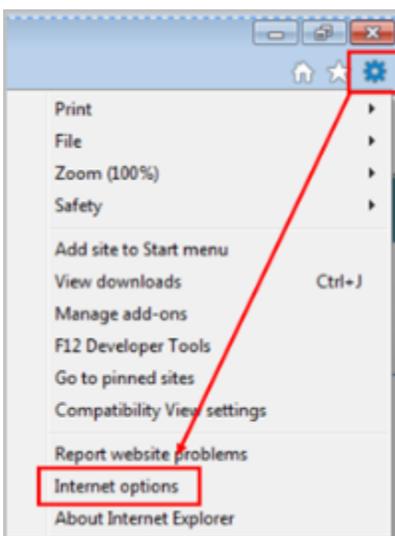
The Manage Reports and Shared Reports features are available to users with the APS-CUSTOMER-ADMIN role. Also, users with the APS-CUSTOMER-REPORT role who are not restricted to specific stores have access to these features. By default, this includes all Pharmserv and PharmacyRx users of APS. For EnterpriseRx Chain, Outpatient, and ISMC customers, those users with the APS-CUSTOMER-REPORT role who are assigned to specific stores in the User Control screen will not have access to the Manage Reports or Shared Reports features.

Reports created using the Manage Reports feature are saved on behalf of the logged in APS user. Each user will see only see the reports he or she has created. If a report is created using the Shared Reports feature, all users with the appropriate role will be able to view, edit, and generate the report. All reports are saved and can be reused unless explicitly deleted.

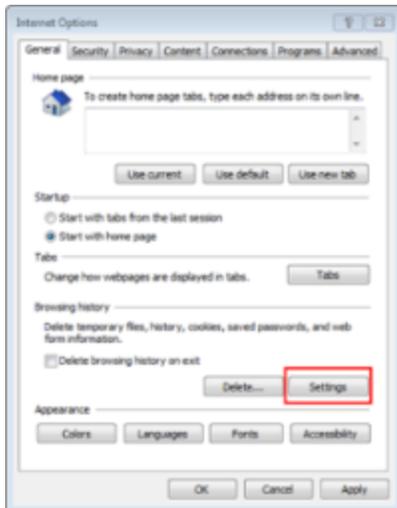
Initially, there are no default reports available. The user must create reports specific to their needs.

Internet Explorer® 11 Settings

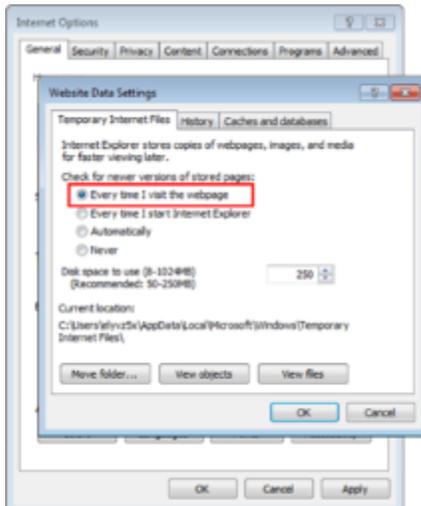
The following Internet Explorer® 11 browser settings need to be changed by users in order to make the new reports work smoothly and avoid refresh issues.



1. Select the Internet options icon (⚙️).



2. Select **Settings**.



3. Select **Every Time I Visit the web page**.
4. Select the **OK** button for both dialog windows to close.

Report Types

There are currently three types of reports that can be created under the **MANAGE REPORTS** or **SHARED REPORTS** tab.

1. **Custom** reports allow the user to select from all the pharmacy patients who are measured for any of the available Adherence drug classes. The user can determine which columns are displayed and in what order. Any of the available columns can be used as filters to determine which patients are reported.

2. **PDC Delta** reports compare some basic Adherence Performance measures over two time periods. This report compares pharmacy performance statistics as of last month (the most recently completed month) versus a prior time - typically one year ago, although the user has the option to select a specific number of previous months for the comparison. For the two time periods (before and after) the following statistics are reported for each drug class:

- **PDC 6** – The average proportion of days covered (PDC) for patients for the last 6 months of the period up to the ending date.
- **PDC 12** – The average PDC for patients 12 calendar months up to the ending date.
- **Fills per patient** – The average number of fills per patient over 12 calendar months up to the ending date.

The above 3 statistics are compared for the before and after periods, and percentage changes are shown.

The output format of this report is mostly fixed, but the user can select which drug classes to compare, and can apply additional filters to compare performance over time for a particular set of patients. APS measures PDC for drug classes DIABETES (non-insulin medications), HYPERTENSION, CHOLESTEROL, and COPD (Note: COPD measurements are available to CPS Premium customers only). Chain customers can choose whether to compare performance before and after for each store, or with a chain wide summary.

The user can choose to filter patients by PDC 6 or PDC 12 values at the before time of the comparison. This report is created with a default filter of PDC 12 in the range 0.0 to 0.79 for the before period. This filter selects patients who were considered non-adherent at the earlier time period. The user can edit filters to change PDC ranges for the starting period.

There are additional filters such as plan attributes, patient age, etc. that can be optionally applied to the patient’s most recent pharmacy fill for the drug class as of the ending period. These filters are:

FILTER NAME	DESCRIPTION
Facility Id	Facility Id or Store number
Plan Bin	Plan Bin
Plan PCN	Plan PCN
Plan Code	Plan Code
Plan Benefit Group	Plan Benefit Group
Plan Name	Plan Name
Prescriber Name	Prescriber last name and Id, e.g. SMITH (DEA XX1112229)
Prescriber Phone	Prescriber Phone
Date of Birth	Date of Birth
Patient Age	Patient Age in years
Gender	Gender: M=male, F=female

Based on the filters that were selected, this report compares averages for the same set of patients who were measurable for adherence in each drug class at both the beginning and ending dates of the comparison.

3. The **User Login** report displays the list of all the user names, display names, last login dates, password expiration dates and default stores.

Manage Reports View / Download Report Results

Report Name : User Login Report
Submitted Date : Jan 21, 2021, 6:23:47 AM

Items per page: 10

Username	Display Name	Last Login Date	Password Expiration Date	Default Store
Test User		NA	12/2/2019	
Test User		NA	10/16/2019	
Test User		NA	10/16/2019	
Test User		NA	10/20/2019	
Test User		NA	4/15/2020	
Test User		NA	1/15/2020	
Test User		NA	10/31/2019	
Test User		NA	11/4/2019	
Test User		NA	12/4/2019	
Test User		NA	10/21/2019	11

Global Search ...

< Previous 1 2 3 Next >

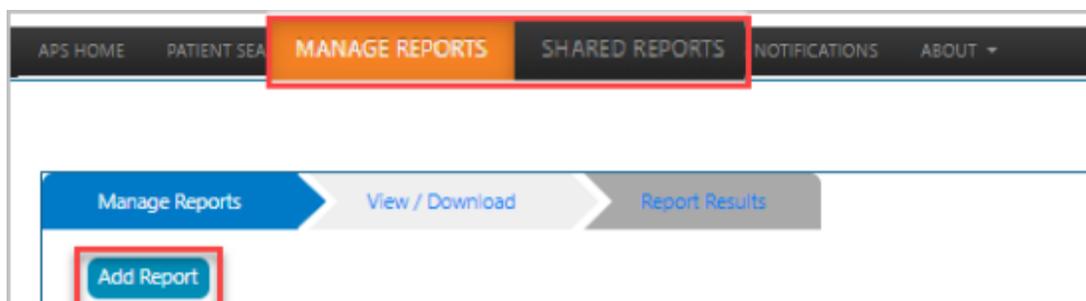
Adding a Report

From the main menu bar, select **MANAGE REPORTS** or **SHARED REPORTS** and then select **Add Report**.



Note:

Reports created using **MANAGE REPORTS** are saved on behalf of the logged in user and each user will only see the reports he or she created. Reports created using **SHARED REPORTS** allow all users with the appropriate role to be able to view, edit, and generate the reports.



The **Basic Report Information** for the **CustomTemplate Type** appears by default. Use the drop-down for the **Template Type** to select a different report type.

Enter a report name. The report name must contain at least 1 character and can also contain the following special characters if desired:

- a space ()
- an underscore (_)
- a hyphen (-)

An existing name cannot be reused. An error message will result. Select the **Save** button when finished.

For the **Custom** and **PDC Delta** reports, select the drug type(s) that will be reported. At least 1 drug type must be selected.



Note:

The **Basic Report Information** window will be different for each of the 3 types of reports.

Custom Report

The **Custom Report** window will display all available drug classes. All drug classes will be deselected by default. Select the drug classes that are to be included in the final report.



Note:
COPD will only be displayed for CPS Premium Customers.

Select the **Save** button to create the report. The **Report Criteria** window will appear, allowing the user to specify criteria and filters for the report. If no specific criteria are required, select the **Done** button or **Manage Reports** to return to a list of all reports. For more information about report criteria and filters for the report refer to "[Report Criteria for Custom Reports](#)" on the next page.

PDC Delta Report

The **PDC Delta Report** window will display all available drug classes. All drug classes will be selected by default. Deselect the drug classes that are not to be included in the final report.

Enter a name for the report.



Note:
COPD will only be displayed for CPS Premium Customers.

Select the **Save** button to create the report. The **Report Criteria** window will appear, allowing the user to specify criteria and filters for the report. If no specific criteria changes are required, select the **Done** button or **Manage Reports** to return to a list of all reports. For more information about report criteria and filters for the report refer to "[Report Criteria for Custom Reports](#)" on the next page.

User Login Report

The **User Login** report is preconfigured. There are no parameters that can be edited. Simply enter a name.

Select the **Save** button to create the report. You will be returned to the previous window.

Report Criteria for Custom Reports

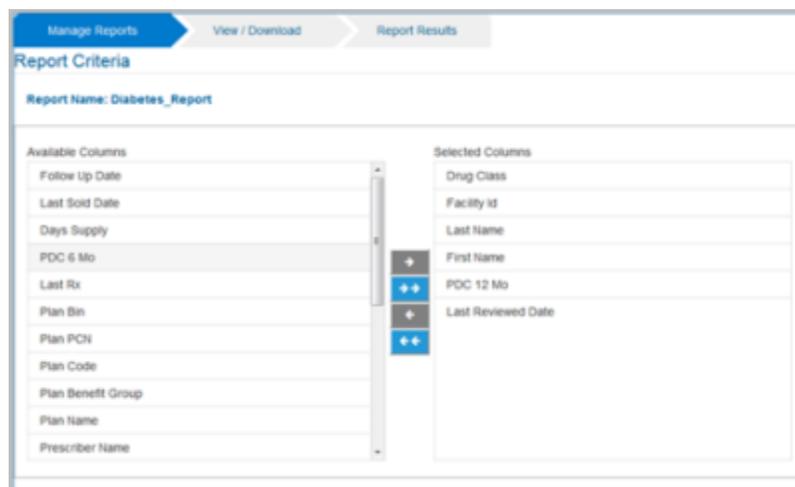
The **Report Criteria** window is divided into 2 areas:

1. ["Available/Selected Columns" below](#)
2. ["Add, Edit and Delete Filters" on page 58](#)

Available/Selected Columns

By default, all columns will be included in the report, and are listed in the **Selected Columns** section. There are 2 ways to reduce the number of columns that will be displayed in the report:

1. Use the double left arrow (⇐) to move all columns from the **Selected Columns** section to the **Available Columns** section. Desired columns can then be moved back to the **Selected Columns** section by highlighting the desired column and selecting the right arrow (⇒). Use of the **Ctrl** key allows for selection of multiple columns.
2. Remove only those columns that are not desired from the **Selected Columns** section individually, or in groups by using the **Ctrl** key, and selecting the left arrow (⇐) to move them to the **Available Columns** section.



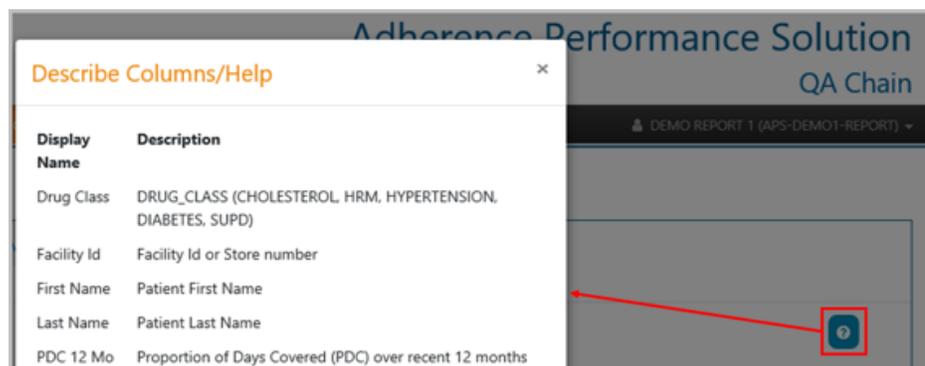
The order of the columns can be changed by dragging and dropping the column to the desired position.



Note:

The **Drug Class** column is a mandatory column in the final report and cannot be removed from the **Selected Columns** list.

For a description of each column in the **Custom** or **PDC Delta** reports, select the **Describe Columns/Help** button.



Year to Date Calculations

APS includes year to date calculations that are intended to help identify borderline patients toward the end of the calendar year, when the adherence outcome can still be influenced. There are 5 columns related to year to date calculations which represents the PDC adherence and non-adherence details for the calendar year. They are:

- ["Point of No Return" on the next page](#)
- ["Coverage Days Needed for Year" on the next page](#)
- ["Year to Date PDC" on the next page](#)

- ["Is Adherent for Year" on the next page](#)
- ["Is Non-Adherent for Year" on the next page](#)

Point of No Return

The **Point of No Return** represents the date by which this patient will become non-adherent for the calendar year, if no new adherence prescription is filled before then. This assumes treatment through year end. This value is missing if patient is already adherent or non-adherent for the year.

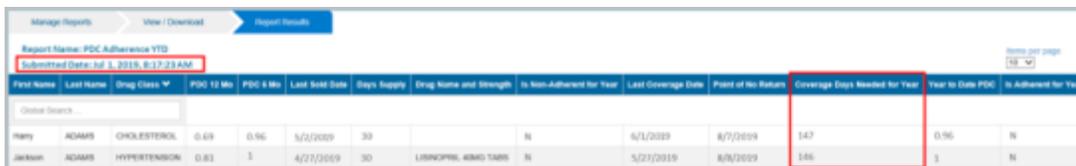


First Name	Last Name	Drug Class	PDC 12 Mo	PDC 6 Mo	Last Fill Date	Days Supply	Drug Name and Strength	Is Non-Adherent for Year	Last Coverage Date	Point of No Return	Coverage Days Needed for Year	Year to Date PDC	Is Adherent for Year
Demi	BAILEY	HYPERTENSION	0.75	0.5	11/09/2018	90	ALACE 10MG CAPS	N	2/26/2019	5/10/2019	235	1	N
Lauren	BAKER	DIABETES	0.76	0.61	1/9/2019	90	GLIMEPIRIDE 1MG TABS	N	2/25/2019	5/09/2019	236	1	N

In the example above, Demi Bailey will become non-adherent for the calendar year, if no new adherence prescription is filled before 05/10/2019 and Lauren Baker will become non-adherent for the calendar year, if no new adherence prescription is filled before 05/09/2019.

Coverage Days Needed for Year

Coverage Days Needed for Year represents the number of additional fill days of coverage (from new fills) needed to ensure adherence for the year, if treatment continues to year end. This value is zero if patient is already adherent for the year. This value is missing if patient is already non-adherent for the year.



First Name	Last Name	Drug Class	PDC 12 Mo	PDC 6 Mo	Last Fill Date	Days Supply	Drug Name and Strength	Is Non-Adherent for Year	Last Coverage Date	Point of No Return	Coverage Days Needed for Year	Year to Date PDC	Is Adherent for Year
Harry	ADAMS	CHOLESTEROL	0.69	0.96	5/2/2019	30		N	6/1/2019	6/7/2019	147	0.96	N
Jackson	ADAMS	HYPERTENSION	0.81	1	4/27/2019	30	LISINAPRIL 40MG TABS	N	5/27/2019	6/6/2019	146	1	N

In the example above, the two patients are now ½ way through the following year. In the last 6 months of 2018, Harry’s PDC 6 Mo value was “0.42” and Jackson’s was “0.62.”

During the 1st 6 months in 2019, both patients worked to raise their PDC values. Accordingly, their PDC 6 Mo values (as well as their Year to Date PDC values) are “0.96” and “1,” respectively. As a result, their PDC 12 Mo values were also raised to “0.69” for Harry, and “0.81” for Jackson.

The additional **Coverage Days Needed for Year** in order to be adherent is calculated to be 147 for Harry and 146 for Jackson.

Year to Date PDC

Year to Date PDC (Proportion of Days Covered) is measured from the beginning of the year (or start of treatment if later) up through the current date. This number includes PDC for any future days (in this year) already covered by a current prescription fill.

Manage Reports View / Download Report Results

Report Name: PDC Adherence YTD
Submitted Date: Jul 1, 2018, 8:17:23 AM

First Name	Last Name	Drug Class	PDC 12 Mo	PDC 6 Mo	Last Sold Date	Days Supply	Drug Name and Strength	Is Non-Adherent for Year	Last Coverage Date	Point of No Return	Coverage Days Needed for Year	Year to Date PDC	Is Adherent for Year
Harry	ADAMS	CHOLESTEROL	0.69	0.96	5/2/2019	30		N	4/1/2019	4/7/2019	147	0.96	N
Jackson	ADAMS	HYPERTENSION	0.81	1	4/27/2019	30	LISINAPRIL 40MG TABS	N	5/27/2019	8/8/2019	146	1	N

In the example above, both patients have a Year to Date PDC value that is above the 80% threshold. Since they are exactly 6 months into the year, their Year to Date value matches their PDC 6 Mo value.

Is Adherent for Year

Is Adherent for Year indicates if the patient is already adherent for the calendar year. If already adherent, **Y** will be displayed. If not currently adherent, **N** will be displayed.

Manage Reports View / Download Report Results

Report Name: Adherent_for_year
Submitted Date: Nov 12, 2018, 9:34:07 AM

First Name	Last Name	Drug Class	PDC 12 Mo	PDC 6 Mo	Last Sold Date	Days Supply	Drug Name and Strength	Is Non-Adherent for Year	Last Coverage Date	Year to Date PDC	Is Adherent for Year
Carlos	ABBOTT	HYPERTENSION	1	1	9/25/2018	90		N	1/22/2019	1	Y
Jeremy	ABBOTT	HYPERTENSION	0.96	1	10/29/2018	90	LOSARTAN POTASSIUM 100MG TABS	N	1/31/2019	0.96	Y

In the above example both the patients are adherent for the calendar year.

Is Non-Adherent for Year

Is Non-Adherent for Year indicates that the patient is already non-adherent for the calendar year. A **Y** will be displayed if the patient is already non-adherent, or **N** if they are not non-adherent.

Manage Reports View / Download Report Results

Report Name: Non-adherent for the year
Submitted Date: Nov 12, 2018, 9:28:05 AM

First Name	Last Name	Drug Class	PDC 12 Mo	PDC 6 Mo	Last Sold Date	Days Supply	Is Non-Adherent for Year	Last Coverage Date	Coverage Days Needed for Year	Year to Date PDC	Is Adherent for Year	Point of No Return
Bradley	ALEXANDER	DIABETES	0.24	0.16	4/15/2018	30	Y	5/14/2018	262	0.09	N	NA
Isiah	ALLEN	DIABETES	0.17	0.17	9/26/2018	30	Y	10/25/2018	262	0.09	N	NA



Notes:

- If **“Is Non-Adherent for Year”** is **Y**, then the **“Is Adherent for Year”** will be **N** and **“Point of No Return”** will be Not Applicable (NA).
- If **“Is Adherent for Year”** is **Y**, then the **“Is Non-Adherent for Year”** will be **N** and **“Point of No Return”** will be Not Applicable (NA).

PDC Parameters for PDC Delta Reports

The PDC Parameters

- **Comparison Time Span in Months.** The **Comparison Time Span in Months** drop-down values ranges from 1 to 18 months. The default value is 12 months.
- **Report Level.** The **Report Level** can be either “Store” or “Chain.” The default value is “Store.”

The user can change these settings to meet their specific requirements.

The screenshot shows a 'Report Criteria' dialog box with the following fields and options:

- Report Name: Report51
- Comparison Time Span in Months: 12 (dropdown)
- Report Level: Store (dropdown)
- Buttons: Save As, Done

Add, Edit and Delete Filters

Filters can be created by selecting the column to filter from the drop-down box and selecting the **Add Filter** button. The **Add Filter** dialog will display.

The screenshot shows an 'Add Filter' dialog box with the following content:

- Title: Add Filter
- Text: PDC 12 Mo
- Options: Value Range
- Buttons: Save, Close

If the **Add Filter** button is selected prior to selecting a column, a dialog box will be displayed instructing the user to select a column to filter.

The screenshot shows a 'Select Column to Add Filter' dialog box with the following content:

- Title: Select Column to Add Filter
- Dropdown menu: [Empty]
- Button: Add Filter
- Section: Filter Condition
- Text: Drug Class = [HYPERTENSION,DIABETES]
- Buttons: Edit (pencil icon), Delete (trash icon)



Note:

The **Drug Class** filter is a mandatory filter and cannot be deleted. Therefore, the **Delete** button (🗑️) is disabled. The user can, however, edit the **Drug Class** filter if desired.

There are 4 types of Filter Data Types:

1. ["Number Data Type" below](#)
2. ["String Data Type" on the next page](#)
3. ["Date Data Type" on page 61](#)
4. ["Drug Class Data Type" on page 62](#)

Multiple filters can be added to a report to create more defined report criteria. The user can mix and match the various types of filters in order to achieve the desired results. When multiple filters are added to the report, they act in an “and” fashion, where the report will filter on the 1st filter AND the 2nd filter AND the 3rd filter, etc.

Number Data Type

The user can select to filter based on a specific value, or on a range. When using the **Value** option, the user can select equal to (=), greater-than-or-equal (>=) or less-than-or-equal (<=). If **Range** is used, the starting (left) number must be less than or equal to the ending (right) number, or an error will be displayed.

Select **Save** to add the filter to the list.

The user has the option to edit any existing filters, or, with the exception of the Drug Class filter, delete existing filters. When adding or changing filters, the user’s work is saved incrementally as each action is completed. When the user is satisfied with the filter selection, select the **Done** button. The user will be returned to the previous window.

Selecting the **Save As** button will open a dialog box, allowing the user to enter a new report name. Select the **Save** button once a new name is entered. Entering an existing report name will result in an error.

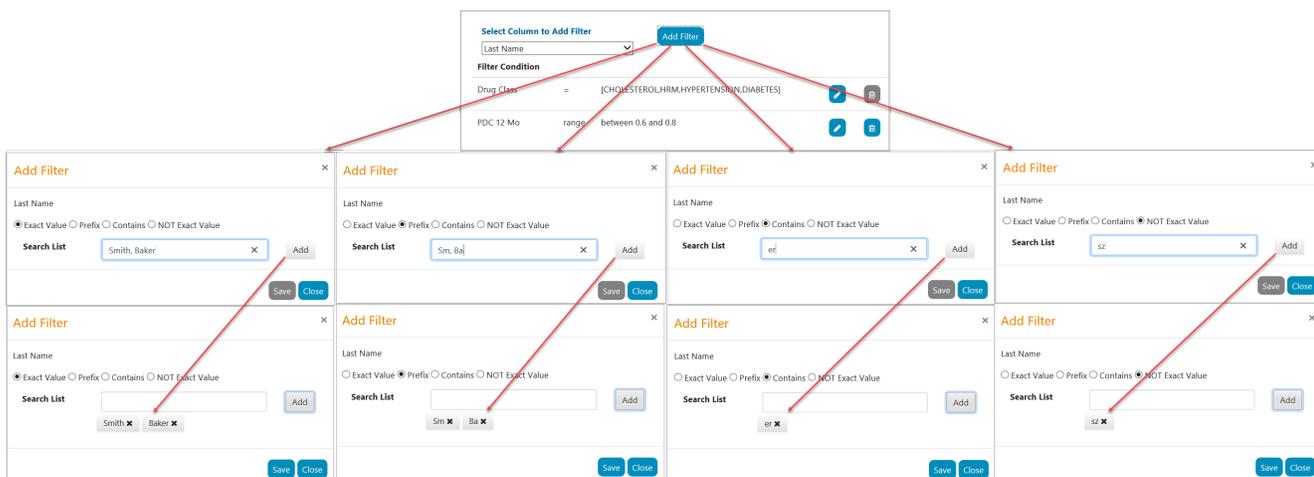


String Data Type

When a column is selected that is based on a character string, the user can select to filter based on:

- **Exact Value.** The Exact Value option will return results that match the filter string exactly.
- **Prefix.** The Prefix option will return results where the start of the string matches the specified filter.
- **Contains.** The Contains option will return results where a character string anywhere in the column field matches the specified filter.
- **NOT Exact Value.** The NOT Exact Value option will exclude results that match the filter string exactly.

For all these operators, a list can be created by entering multiple values, separated by a comma and then selecting the **Add** button. Items can also be added one-by-one by selecting the **Add** button after each entry. The filter values will be added to the list and appear below the filter entry box.



Once the filter list has been created, select the **Save** button to add the filter to the list.

Select Column to Add Filter				
Last Name		Add Filter		
Filter Condition				
Drug Class	=	[DIABETES]		
PDC 12 Mo	range	between 0.6 and 0.8		
Last Name	exact-match	[Anderson, Baker]		

The **Save As** and **Done** buttons will require the user to enter a new name and save, or returns the user to the previous window, respectively, as described in "[Number Data Type](#)" on page 59 above.

Date Data Type

The user can select to filter based on:

- **Value.** When using the Value option, the user can select equal to (=), greater-than-or-equal (>=) or less-than-or-equal (<=) a specified date.
- **Range.** Using a Range allows the user to specify a beginning and ending date for the filter.
- **Relative Days.** Relative Days are used to specify the number of days in the past (negative numbers) or in the future (positive numbers), if applicable, relative to the current date. The user can also include records with no date if desired.



Note:

If either **Range** or **Relative Days** is used, the starting (left) date or number must be less than or equal to the ending (right) date or number, or an error will be displayed.

Once the filter list has been created, select the **Save** button to add the filter to the list.

Select Column to Add Filter			
Last Sold Date			Add Filter
Filter Condition			
Drug Class	=	[DIABETES]	✎ 🗑️
PDC 12 Mo	range	between 0.6 and 0.8	✎ 🗑️
Last Name	exact-match	[Anderson, Baker]	✎ 🗑️
Last Sold Date	greater-than-or-equal	04/01/2018	✎ 🗑️

The **Save As** and **Done** buttons will require the user to enter a new name and save, or returns the user to the previous window, respectively, as described in "[Number Data Type](#)" on page 59 above.

Drug Class Data Type

The Drug Class Data Type allows the user to filter based on one or more drug classes. At least one drug class must be selected. If no drug class is selected, the **Save** button will be disabled.

Select Column to Add Filter

Drug Class

Add Filter

Filter Condition

Drug Class	=	[DIABETES]	✎ 🗑️
Last Name	exact-match	[Anderson, Baker]	✎ 🗑️
PDC 12 Mo	range	between 0.6 and 0.8	✎ 🗑️
Last Sold Date	greater-than-or-equal	04/01/2018	✎ 🗑️

Edit Filter

Drug Class

CHOLESTEROL

HRM

HYPERTENSION

DIABETES

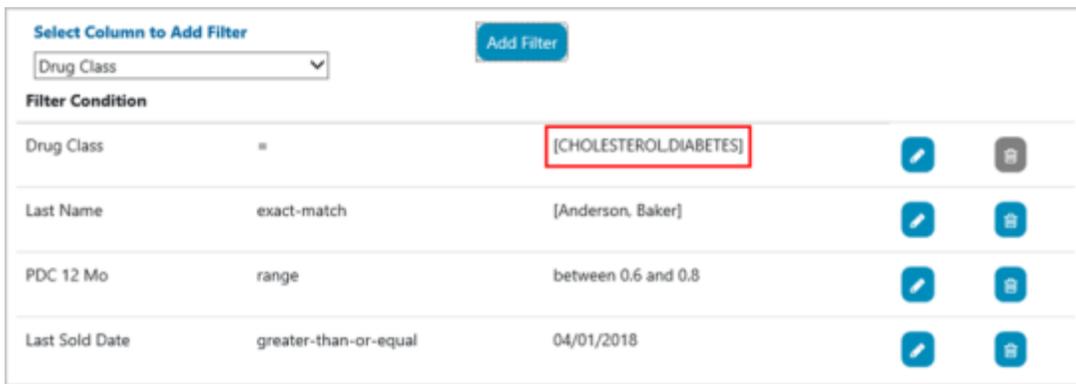
SUPD

COPD

COPD will only be displayed for CPS Premium Customers

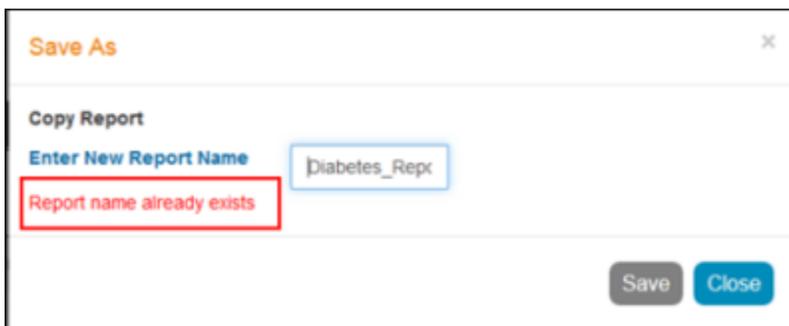
Save Close

Once the drug classes have been selected, select the **Save** button to add the filter to the list.



Saving Updated Reports

As described previously, the user has the option to edit any existing filters, or, with the exception of the Drug Class filter, delete existing filters. When adding or changing filters, the user’s work is saved incrementally as each action is completed. When the user is satisfied with the filter selection, select the **Done** button. The user will be returned to the previous window. Selecting the **Save As** button will open a dialog box, allowing the user to enter a new report name. Select the **Save** button once a new name is entered. Entering an existing report name will result in an error.



Editing Existing Reports

Users can edit an existing report by selecting the **Edit** button. By default, all reports are displayed in descending order of **Creation Date**, meaning the most recently created will be displayed at the top. The reports can be sorted by selecting the headers of the column names in ascending or descending order.



The process to edit an existing report utilizes the same steps as described above for:

- ["Report Criteria for Custom Reports" on page 54](#)
- ["PDC Parameters for PDC Delta Reports" on page 57](#)

Viewing Reports Online

Reports can be viewed online by selecting the **View Online** button.

Report Name	Type	Creation Date	Modified Date	
Cholesterol - Diabetes	Custom	8/16/18, 9:45 AM	8/16/18, 9:50 AM	View Online (highlighted)
Diabetes	Custom	8/16/18, 9:11 PM	8/16/18, 9:46 AM	View Online

Once the **View Online** button is selected the system will process the request. This may take several seconds, depending on the filters that are applied. On the **View / Download** tab all the reports are displayed in descending order of **Submitted Date**, meaning the most recently submitted will be displayed at the top. The reports can be sorted by selecting the headers of the column names in ascending or descending order.

Report Name	Type	Submitted	Status	Expires	Row Count	Output
Cholesterol - Diabetes	Custom	Aug 16, 2018, 11:51:19 AM	submitted	Aug 16, 2018, 11:51:19 PM		Processing online... (highlighted)

To view the results online, select the **online** button. The report will be maintained for 12 hours from the submitted date/time. At that point, the **Expires** date/time will be reached, and the report will be deleted from the database.

Report Name	Type	Submitted	Status	Expires	Row Count	Output
Cholesterol - Diabetes	Custom	Aug 16, 2018, 11:51:19 AM	ready	Aug 16, 2018, 11:51:19 PM	25	online (highlighted)

The results will be displayed in table format under **Report Results**. The user has the option to determine the number of rows that will be displayed per page. The **Next >>** and **<< Previous** buttons allows the user to toggle between pages.



Note:

The maximum number of rows that can be displayed online is 500. Additional filters should be utilized in order to reduce the number of rows below 500. To view more than 500 rows, the report must be downloaded to Excel®, as described in ["Downloading Results to an Excel® Spreadsheet" on the next page.](#)

The examples below are for a **Custom Report** and a **User Login Report**.

Manage Reports View / Download Report Results

Report Name : Cholesterol - Diabetes
Submitted Date : Aug 16, 2018, 11:59:17 AM

Items per page: 10

Drug Class	Facility Id	Last Name	First Name	POC 12 Mo	Last Sold Date
CHOLESTEROL	5	ANDERSON	Abbie	0.7	7/11/2018
CHOLESTEROL	2	ANDERSON	Alex	0.72	7/28/2018
CHOLESTEROL	7	ANDERSON	Alexis	0.72	7/26/2018
CHOLESTEROL	2	ANDERSON	Alexis	0.71	6/22/2018
CHOLESTEROL	8	ANDERSON	Andy	0.66	7/20/2018
CHOLESTEROL	2	ANDERSON	Ariana	0.65	5/30/2018
CHOLESTEROL	5	ANDERSON	Blake	0.77	5/15/2018
CHOLESTEROL	7	ANDERSON	Britney	0.7	8/7/2018
CHOLESTEROL	2	ANDERSON	Danny	0.66	7/10/2018
CHOLESTEROL	5	ANDERSON	Demi	0.74	5/23/2018

< Previous 1 2 3 Next >

Manage Reports View / Download Report Results

Report Name : User Login Report
Submitted Date : Sep 17, 2018, 2:23:59 PM

Items per page: 10

Username	Display Name	Last Login Date	Password Expiration Date	Default Store
jsmith1	Jeremy Smith	9/17/2018	10/12/2018	9
fabbott	Fred Abbott	9/17/2018	11/21/2018	12
jparks	Jillian Parks	9/17/2018	1/6/2019	7
stanner	Stacey Tanner	8/1/2018	12/19/2018	11
klee1	Kim Lee	6/26/2018	11/27/2018	7
jsbach	Johann Bach	6/19/2018	2/3/2019	2
bdecker	Barb Decker	6/12/2018	4/6/2019	4
jfairchild	Joe Fairchild	6/7/2018	10/21/2018	5
jmayer	Jocelyn Mayer	6/7/2018	8/14/2018	3
jrhodes	Jake Rhodes	6/7/2018	9/26/2018	8

< Previous 1 2 Next >

Downloading Results to an Excel® Spreadsheet

Reports can be exported to an Excel® spreadsheet, by selecting the **Download Excel** button. This allows for more in-depth analysis of the data, as well as create historical records.

Manage Reports View / Download Report Results

ADD REPORT

Report Name	Type	Creation Date	Modified Date	
Cholesterol - Diabetes	Custom	8/16/18, 9:49 AM	8/16/18, 9:50 AM	   
Diabetes	Custom	8/15/18, 9:11 PM	8/16/18, 9:46 AM	   

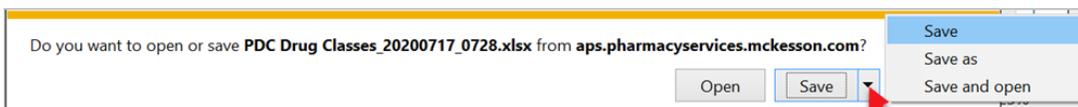
Once the **Download Excel** button is selected the system will process the request. This may take several seconds, depending on the filters that are applied. On the **View / Download** tab all the reports are displayed in descending order of **Submitted Date**, meaning the most recently submitted will be displayed at the top. The reports can be sorted by selecting the headers of the column names in ascending or descending order.

Report Name	Type	Submitted	Status	Expires	Row Count	Output
Cholesterol - Diabetes	Custom	Aug 16, 2018, 12:06:21 PM	submitted	Aug 17, 2018, 12:06:21 AM		Processing excel...

To view the results, select the **excel** button. The report will be maintained for 12 hours from the submitted date/time. At that point, the **Expires** date/time will be reached, and the report will be deleted from the database.

Report Name	Submitted	Status	Expires	Row Count	Output
Diabetes_Cholesterol	Jun 12, 2018, 11:19:16 AM	ready	Jun 12, 2018, 11:19:16 PM	80	excel

When the **excel** button is selected, a dialog box will appear prompting the user to select what they want to do with the file. Follow the steps on your computer to download the file.



The download produces an Excel® spreadsheet that can be manipulated utilizing built in Excel® functionality.

The examples below are of the Excel® download for a **Custom Report**, and a **User Login Report**.

	A	B	C	D	E	F
1	Drug Class	Facility Id	Last Name	First Name	PDC 12 Mo	Last Sold Date
2	CHOLESTEROL	5	ANDERSON	Abbie	0.7	07/11/2018
3	CHOLESTEROL	2	ANDERSON	Alex	0.72	07/28/2018
4	CHOLESTEROL	7	ANDERSON	Alexis	0.72	07/26/2018
5	CHOLESTEROL	2	ANDERSON	Alexis	0.71	06/22/2018
6	CHOLESTEROL	8	ANDERSON	Andy	0.66	07/20/2018
7	CHOLESTEROL	2	ANDERSON	Ariana	0.65	05/30/2018
8	CHOLESTEROL	5	ANDERSON	Blake	0.77	05/15/2018
9	CHOLESTEROL	7	ANDERSON	Britney	0.7	08/07/2018
10	CHOLESTEROL	2	ANDERSON	Danny	0.66	07/10/2018
11	CHOLESTEROL	5	ANDERSON	Demi	0.74	05/23/2018
12	CHOLESTEROL	7	ANDERSON	Edward	0.71	07/31/2018
13	DIABETES	5	ANDERSON	Eloise	0.78	08/14/2018
14	CHOLESTEROL	7	ANDERSON	Freddie	0.79	05/21/2018
15	CHOLESTEROL	5	ANDERSON	Isabel	0.67	05/10/2018
16	CHOLESTEROL	5	ANDERSON	Jamie	0.65	07/16/2018
17	CHOLESTEROL	7	ANDERSON	Jason	0.79	07/21/2018
18	CHOLESTEROL	5	ANDERSON	Jesus	0.75	05/26/2018
19	CHOLESTEROL	5	ANDERSON	Kyle	0.65	07/24/2018
20	CHOLESTEROL	5	ANDERSON	Kylie	0.76	05/30/2018
21	CHOLESTEROL	5	ANDERSON	Loren	0.79	06/15/2018
22	DIABETES	5	ANDERSON	Maya	0.67	04/25/2018
23	CHOLESTEROL	2	ANDERSON	Oscar	0.79	04/20/2018
24	CHOLESTEROL	5	ANDERSON	Rebecca	0.76	07/16/2018
25	CHOLESTEROL	7	ANDERSON	Riley	0.76	07/05/2018
26	DIABETES	2	ANDERSON	Sebastian	0.61	07/24/2018

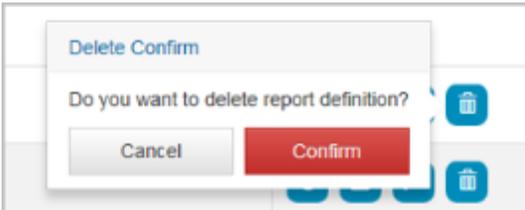
	A	B	C	D	E
1	Username	Display Name	Last Login Date	Password Expiration	Default Store
2	jsmith1	Jeremy Smith	9/17/2018	10/12/2018	9
3	fabbott	Fred Abbott	9/17/2018	11/21/2018	12
4	jparks	Jillian Parks	9/17/2018	1/6/2019	7
5	stanner	Stacey Tanner	8/1/2018	12/19/2018	11
6	klee1	Kim Lee	6/26/2018	11/27/2018	7
7	jsbach	Johann bach	6/19/2018	2/3/2019	2
8	bdecker	Barb Decker	6/12/2018	4/6/2019	4
9	fairchild	Joe Fairchild	6/7/2018	10/21/2018	5
10	jmayes	Jocelyn Mayes	6/7/2018	8/14/2018	3
11	rhodes	Jake Rhodes	6/7/2018	9/26/2018	8
12	rstevenson	Robert Stevenson	5/14/2018	11/1/2018	6
13	pmiller	Patricia Miller	5/11/2018	1/15/2019	3
14	djackson	Derek Jackson	5/2/2018	12/25/2018	4
15	lclark	Lewis Clark	4/29/2018	12/31/2018	2
16	jcarter	Jack Carter	4/21/2018	11/14/2018	1
17					

Deleting Reports

Reports that are no longer needed can be deleted by selecting the **Delete** button.



The user will be asked to confirm the deletion.



Chapter 7: CPS and APS Integration

Key Concepts for CPS and APS Integration

- ["McKesson's Clinical Programs Solution Overview" on the next page](#)
 - ["Key Components of CPS" on the next page](#)
- ["CPS and APS Integration" on the next page](#)
- ["Types of APS Notifications in CPS" on the next page](#)
- ["Configuring APS Notifications in CPS" on page 72](#)
 - ["CPS Configuration" on page 72](#)
 - ["Custom Filters" on page 74](#)
 - ["Adding Custom Filters" on page 74](#)
 - ["Filter Criteria for Custom Filters" on page 75](#)
 - ["Available/Selected Columns" on page 76](#)
 - ["Add, Edit and Delete Filter Conditions" on page 77](#)
 - ["Number Data Type" on page 78](#)
 - ["String Data Type" on page 79](#)
 - ["Date Data Type" on page 80](#)
 - ["Drug Class Data Type" on page 81](#)
 - ["Applying Custom Filters" on page 82](#)
 - ["Editing Custom Filters" on page 82](#)
 - ["Saving Updated Custom Filters" on page 82](#)
 - ["Deleting Custom Filters" on page 83](#)
 - ["Viewing Custom Filter Results" on page 83](#)
 - ["Viewing Results Online" on page 83](#)
 - ["Downloading Results to an Excel® Spreadsheet" on page 84](#)
 - ["Preview All Applied Filters" on page 86](#)
- ["Viewing Patient Adherence Alerts in the CPS Clinical App" on page 86](#)

- ["Viewing Patient Adherence Alerts in the CPS Task Queue" on page 88](#)
- ["Opening the APS Patient Profile via Patient Adherence Alerts" on page 89](#)

McKesson's Clinical Programs Solution Overview

McKesson's Clinical Programs Solution (CPS) enables you to drive clinical interactions between your pharmacy and patients. CPS is an application that interacts directly with pharmacy staff throughout workflow in your pharmacy management system. CPS connects pharmacy staff to clinical opportunities identified for patients. These opportunities can be identified by your clinical vendor partners or they can even be opportunities that your pharmacy wants to target. CPS helps increase patient engagement while maximizing the clinical impact that your pharmacy has on your patients.

Key Components of CPS

- A Clinical App that interacts directly with pharmacy staff throughout workflow.
- A Task Queue that supports engaging patients outside of your pharmacy.
- Customizable questionnaires that allow for clinical documentation in a repeatable, consistent manner.
- A robust clinical profile that provides insight into everything you are doing clinically for a patient.
- When coupled with APS, CPS will facilitate identifying and engaging non-adherent patients during and outside of prescription processing.

CPS and APS Integration

The CPS and APS integration provides "real-time" data on patient adherence within pharmacy workflow. On a weekly and/or daily basis, APS notifications are created in CPS to alert pharmacy staff of non-adherent patients.

Types of APS Notifications in CPS

There are two types of APS notifications supported in CPS: **Patient Adherence Alerts** and **Key-Value Pair Measures**.

Patient Adherence Alerts contain patient adherence details and display in the CPS Clinical App when the patient is context, as well as in the CPS Task Queue outside of prescription processing.

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Alerts

Adherence Performance Solution

This Patient is non-adherent. Update the Patient's status using the APS Profile button below.

Patient Statistics (PDC 12)

0.84 CHOL	↑	0.79 HYP	↓
--------------	---	-------------	---

Last Reviewed Date : Follow Up Date :

Drug Details

DRUG	RX#	LAST COVERAGE
ATORVASTATIN CALCIUM 20MG TABS (CHOL)	3486839	07/30/2020
LOSARTAN POTASSIUM 50MG TABS (HYP)	2579944	07/07/2020

Patient Notes

2020-07-17 - aps-np-admin (Phone)
Spoke to patient via phone

Severity: Low
Expires: 07/22/2020

Received: 07/17/2020 3:28 PM

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Key-Value Pair Measures contain adherence measures and are created on a weekly basis for all measured patients. You can view a patient's adherence measures using the **Patient Health Values** tab within the CPS **Patient Profile**.

The screenshot shows the MCKESSON Clinical Programs Solution interface. At the top, there are tabs for 'Patient Health Values', 'Program Enrollment', and 'Program Messages'. Below the tabs, there is a filter section with a text input field and buttons for 'Past Month', 'Past 3 Months', 'Past 6 Months', 'Past Year', and 'All'. An 'Export' button is also visible. The main content is a table with the following data:

Program	Field Name	Field Value	Received Date
Adherence Performance Solution	CHOLESTEROL PDC	0.71	09/06/2019 04:18PM
Adherence Performance Solution	HYPERTENSION PDC	0.71	09/06/2019 04:18PM
Adherence Performance Solution	DIABETES PDC	0.63	09/06/2019 04:18PM
Adherence Performance Solution	SUPD PDC	1	09/06/2019 04:18PM
Adherence Performance Solution	CHOLESTEROL PDC	0.69	08/30/2019 03:18PM
Adherence Performance Solution	HYPERTENSION PDC	0.69	08/30/2019 03:18PM

Configuring APS Notifications in CPS

The **CPS NOTIFICATIONS** menu option in APS allows you to modify the configuration of APS related notifications that are sent to CPS.



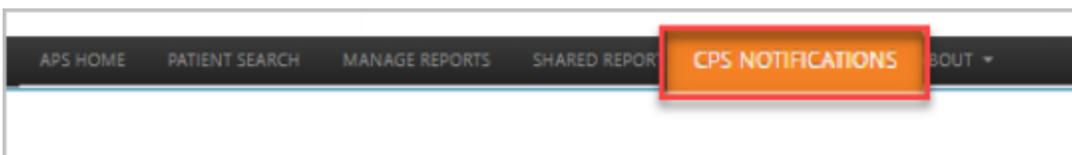
Note:

The **CPS NOTIFICATIONS** menu option will only be available if you have the **APS-CUSTOMER-ADMIN** role.

After opening the **CPS Notifications** screen, you can enable/disable **Patient Adherence Alerts** and **Weekly Key-Value Pair Measures**, as well as specify the **PDC Selection** (6 or 12 month) and **Facility Selection** that should be used for your pharmacies. Additionally, you can configure **Filter Conditions**, such as yearly adherence status and patient reviewed state, that you want to apply to **Patient Adherence Alerts**.

CPS Configuration

To get started, first select the **CPS NOTIFICATIONS** menu option in APS.



The **CPS Notifications** screen will display so that you can customize the **Notification Types** and **Notification Options** that you want to support for your pharmacy.



Note:

In order to leverage APS notifications in CPS, you first need to enable the **Adherence Performance Solution** program. From CPS Program Admin, enter **Adherence Performance Solution** in the **Filter By** field. Once the program displays in the list, select the **Enable** button.

1. Use the **Patient Adherence Alerts** drop-down to select the appropriate setting. Available settings include:
 - **Enabled with Legacy Filters:** **Legacy Filters** will be used to determine what **Patient Adherence Alerts** are generated. To view your **Legacy Filters**, select the **View Legacy Filters** button.
 - **Enabled with Custom Filters:** **Custom Filters** will be used to determine what **Patient Adherence Alerts** are generated. If selected, a **Manage Filters** section that allows you to create **Custom Filters** will appear below the **CPS Configuration** section.
 - **Disabled:** **Patient Adherence Alerts** will not be generated.
2. Select **Daily** or **Weekly** from the **Frequency** drop-down to configure how often **Patient Adherence Alerts** are sent to CPS.
3. Use the **Weekly Key-Value Pair Measures** drop-down to select the appropriate setting. Available settings include:
 - **Enabled:** **Key-Value Pair Measures** will be sent to CPS on a weekly basis for all measured patients.
 - **Disabled:** **Key-Value Pair Measures** will not be generated.
4. Use the **PDC Selection** drop-down to select if **Patient Adherence Alerts** and/or **Key-Value Pair Measures** contain **6 month PDC** or **12 month PDC** calculations.

- Use the **Facility Selection** drop-down to select if **Patient Adherence Alerts** and/or **Key-Value Pair Measures** are sent to all facilities or select facilities. If **Select Facilities** is selected in the drop-down, you will have the option to enable/disable notifications at an individual facility level.
- Select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Custom Filters

Custom Filters define a set of criteria regarding patient adherence. If a patient matches the criteria of any **Custom Filter** with the **Apply Filter?** checkbox selected, an APS **Patient Adherence Alert** will be sent to CPS for that patient when **Alerts** are next generated.

Adding Custom Filters

When **Patient Adherence Alerts** are enabled with **Custom Filters**, **Manage Filters** displays immediately below the **CPS Configuration** section.

On the **Manage Filters** tab select the **Add Filter** button.

Filter Name	Apply Filter?	Creation Date	Modified Date	
Previous All Applied Filters				
Meals PDC with Adherence Exclusion	<input checked="" type="checkbox"/>	6/25/20, 12:07 PM	7/7/20, 3:09 PM	[Icons]
Mail Reminder Date	<input checked="" type="checkbox"/>	6/25/20, 9:17 AM	7/7/20, 3:13 PM	[Icons]
SLPD and HRA PDC's	<input checked="" type="checkbox"/>	6/25/20, 9:16 AM	7/7/20, 3:13 PM	[Icons]
Adherence Exclusion PDC's (Meals)	<input checked="" type="checkbox"/>	6/25/20, 9:15 AM	6/25/20, 9:17 AM	[Icons]
DIABETES FILTER	<input type="checkbox"/>	4/7/20, 3:34 PM	6/23/20, 11:05 AM	[Icons]

The **Create CPS Filter** screen displays.

Create CPS Filter [Close]

Filter Name 1

Starting Template (Select one) 2

Blank Filter
Start with a blank filter

PDC Drug Classes with Adherence Exclusion Filter Template
Starting Criteria in Filter:

- Drug Classes: Diabetes, Hypertension, Cholesterol, COPD
- PDC 12 Mo between .5 and .8
- Plan filters
- Coverage ended 5 to 100 days ago
- Yearly adherence for patient has not yet been determined
- Patient has not been reviewed in the last two weeks

SUPD and HRM Filter Template
Starting Criteria in Filter:

- Drug Classes: SUPD, HRM
- PDC 12 Mo is 0
- Plan filters

Refill Reminder Filter Template
Starting Criteria in Filter:

- Drug Classes: Diabetes, Hypertension, Cholesterol, COPD
- Coverage ended 5 to 100 days ago

Save 3 Cancel

1. Enter a **Filter Name**.
2. Select a **Starting Template**.
3. Select the **Save** button to save the **Custom Filter**, or the **Cancel** button to discard the **Custom Filter**.



Note:
When **Blank Filter** is selected as the **Starting Template**, you will also need to select the **Drug Types** in order to save the **Custom Filter**.

The **Filter Criteria** screen displays so that you can define the criteria for the **Custom Filter**.

Filter Criteria for Custom Filters

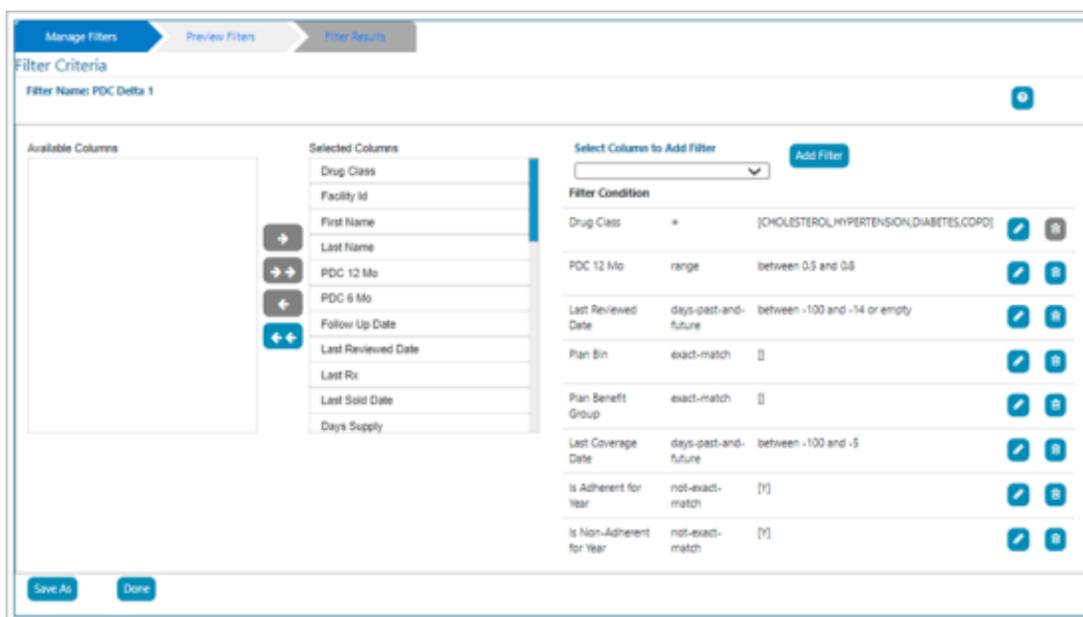
The **Filter Criteria** screen is divided into 2 areas:

1. ["Available/Selected Columns" on the next page](#)
2. ["Add, Edit and Delete Filter Conditions" on page 77](#)

Available/Selected Columns

By default, all columns will be included when viewing the results of the **Custom Filter**. There are 2 ways to reduce the number of columns that will be displayed in the results:

1. Use the double left arrow (⇐) to move all columns from the **Selected Columns** section to the **Available Columns** section. Desired columns can then be moved back to the **Selected Columns** section by highlighting the desired column and selecting the right arrow (⇒). Use of the **Ctrl** key allows for selection of multiple columns.
2. Remove only those columns that are not desired from the **Selected Columns** section individually, or in groups by using the **Ctrl** key, and selecting the left arrow (⇐) to move them to the **Available Columns** section.



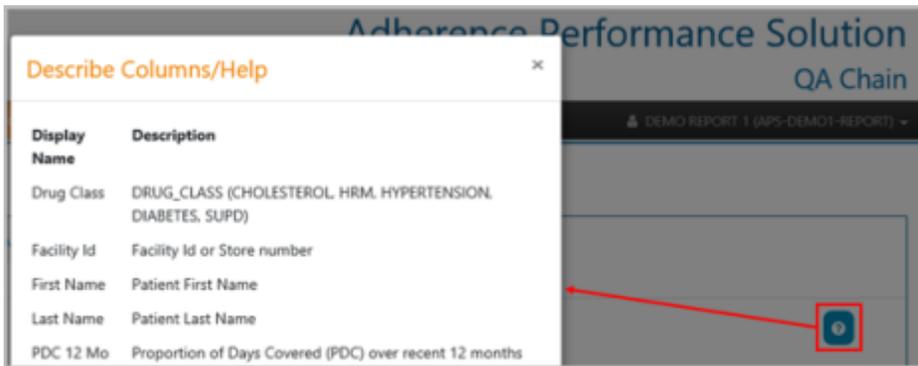
The order of the columns can be changed by dragging and dropping a column in the desired position.



Note:

The **Drug Class** column is a mandatory column and cannot be removed from the **Selected Columns** list.

For a description of each column, select the **Describe Columns/Help** button.

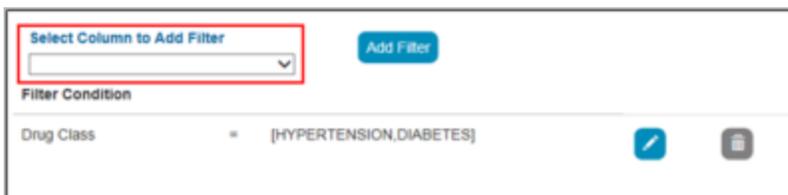


Add, Edit and Delete Filter Conditions

Filter Conditions can be created by selecting the column to filter from the **Select Column to Add Filter** drop-down and selecting the **Add Filter** button. The **Add Filter** dialog will display.



If the **Add Filter** button is selected prior to selecting a column, a dialog box will be displayed instructing you to select a column to filter.



Note:

The **Drug Class Filter Condition** is mandatory and cannot be deleted. Therefore, the **Delete** button () is disabled. You can, however, edit the **Drug Class Filter Condition** if desired.

There are 4 types of Filter Data Types:

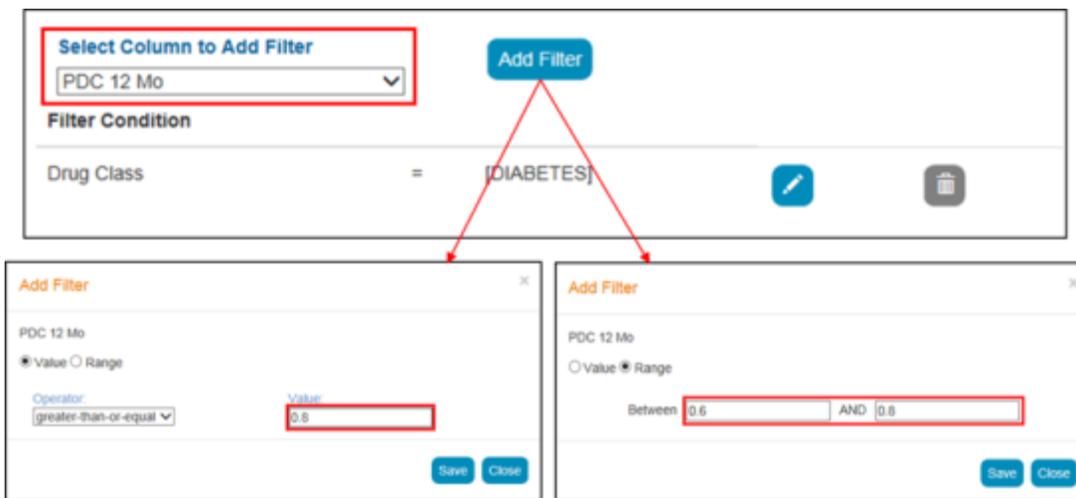
1. ["Number Data Type" on the next page](#)
2. ["String Data Type" on page 79](#)

3. ["Date Data Type" on page 80](#)
4. ["Drug Class Data Type" on page 81](#)

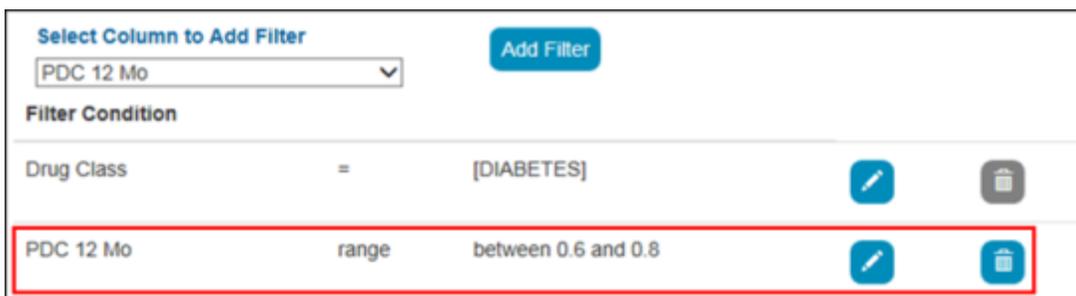
Multiple **Filter Conditions** can be added to a **Custom Filter** to create more defined criteria. You can mix and match the various types of **Filter Conditions** in order to achieve the desired results. When multiple **Filter Conditions** are added to a **Custom Filter**, they act in an “and” fashion, where the report will filter on the 1st **Filter Condition** AND the 2nd **Filter Condition** AND the 3rd **Filter Condition**, etc.

Number Data Type

When a column is selected that is based on a number, you can select to filter based on a specific value or on a range. When using the **Value** option, you can select **equal to** (=), **greater-than-or-equal** (>=) or **less-than-or-equal** (<=). If **Range** is used, the starting (left) number must be less than or equal to the ending (right) number, or an error will be displayed.



Once the criteria have been added, select the **Save** button to add the **Filter Condition**.



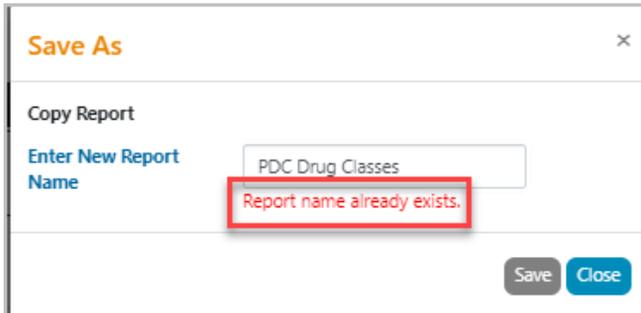
You have the option to edit any existing **Filter Conditions**, or, with the exception of the **Drug Class Filter Condition**, delete existing **Filter Conditions**. When adding or changing **Filter Conditions**, your work is saved incrementally as each action is completed. When you are satisfied with the Filter Conditions, select the **Done** button. You will be returned to the previous window.

Selecting the **Save As** button will open a dialog box, allowing you to enter a new **Custom Filter** name. Select the **Save** button once a new name is entered.



Note:

The **Custom Filter** name entered cannot match an existing **Custom Filter** name.

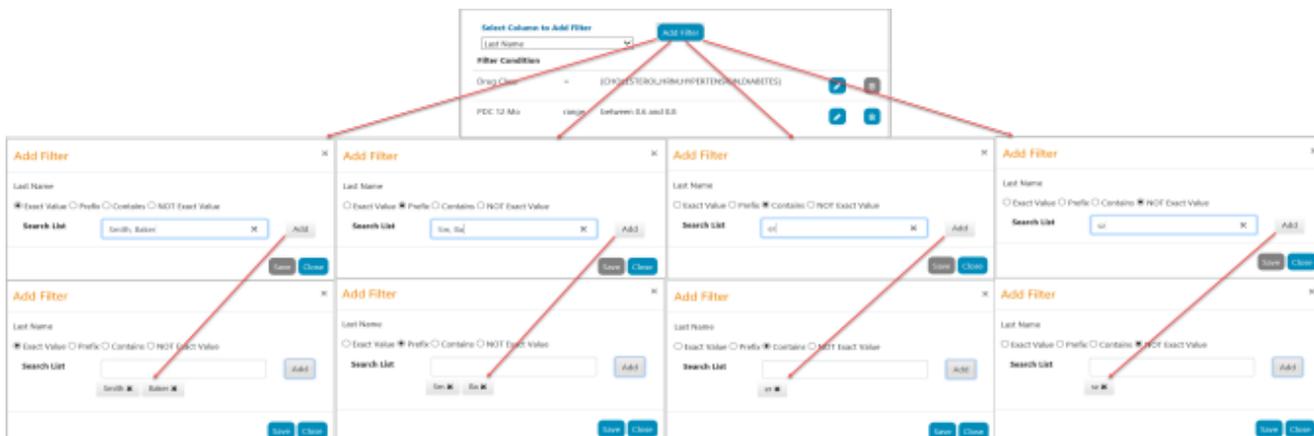


String Data Type

When a column is selected that is based on a character string, you can select to filter based on:

- **Exact Value:** The **Exact Value** option will return results that match the **Search List** string exactly.
- **Prefix:** The **Prefix** option will return results where the start of the column field matches the **Search List** string.
- **Contains:** The **Contains** option will return results where a character string anywhere in the column field matches the **Search List** string
- **NOT Exact Value:** The **NOT Exact Value** option will exclude results that match the **Search List** string exactly.

For all these operators, a list can be created by entering multiple values, separated by a comma and then selecting the **Add** button. Values can also be added one-by-one by selecting the **Add** button after each entry. The **Search List** values will be added to the list and appear below the **Search List** entry box.



Once the list has been created, select the **Save** button to add the **Filter Condition**.

Column	Operator	Value	Edit	Delete
Drug Class	=	[HRMSUPC]		
PDC 12 Mo	equal to	0		
Plan Bin	exact-match	[]		
Plan Benefit Group	exact-match	[]		

The **Save As** and **Done** buttons will require you to enter a new **Custom Filter** name and save, or return you to the previous window, respectively, as described in "[Number Data Type](#)" on page 78 above.

Date Data Type

When a column is selected that is based on a date, you can select to filter based on:

- **Value:** When using the **Value** option, you can select **equal to (=)**, **greater-than-or-equal (>=)** or **less-than-or-equal (<=)** a specified date.
- **Range:** Using a **Range** allows you to specify a beginning and ending date for the **Filter Condition**.
- **Relative Days:** **Relative Days** are used to specify the number of days in the past (negative numbers) or in the future (positive numbers), if applicable, relative to the current date. You can also include records with no date if desired.



Note:

If either **Range** or **Relative Days** is used, the starting (left) date or number must be less than or equal to the ending (right) date or number, or an error will be displayed.

Once the criteria have been added, select the **Save** button to add the **Filter Condition**.

Select Column to Add Filter			
Last Reviewed Date		Add Filter	
Filter Condition			
Drug Class	=	[CHOLESTEROL,HYPERTENSION,DIABETES,COPD]	
PDC 12 Mo	range	between 0.5 and 0.8	
Last Reviewed Date	days-past-and-future	between -100 and -14 or empty	

The **Save As** and **Done** buttons will require you to enter a new **Custom Filter** name and save, or return you to the previous window, respectively, as described in "[Number Data Type](#)" on page 78 above.

Drug Class Data Type

The **Drug Class Data Type** allows you to filter based on one or more drug classes. At least one drug class must be selected. If no drug class is selected, the **Save** button will be disabled.

Select Column to Add Filter

Drug Class

Add Filter

Filter Condition

Drug Class	=	[CHOLESTEROL,HYPERTENSION,DIABETES,COPD]	
PDC 12 Mo	range	between 0.5 and 0.8	
Last Reviewed Date	days-past-and-future	between -100 and -14 or empty	

Edit Filter

Drug Class

- CHOLESTEROL
- HRM
- HYPERTENSION
- DIABETES
- SUPD
- COPD

Save Close

Once you have selected the appropriate drug class(es), select the **Save** button to add the **Filter Condition**.

Select Column to Add Filter			
Drug Class		Add Filter	
Filter Condition			
Drug Class	=	[CHOLESTEROL,HYPERTENSION,DIABETES,COPD]	
PDC 12 Mo	range	between 0.5 and 0.8	
Last Reviewed Date	days-past-and-future	between -100 and -14 or empty	

Applying Custom Filters

For a **Custom Filter** to be used when determining what **Patient Adherence Alerts** are generated, the **Apply Filter?** checkbox must be selected for the **Custom Filter**.

Filter Name	Apply Filter?	Creation Date	Modified Date	
Filter Name Search ...				
Preview All Applied Filters				
SUPD and HRM Filter	<input checked="" type="checkbox"/>	7/16/20, 3:45 PM	7/16/20, 3:45 PM	[Icons]
PDC Drug Classes	<input checked="" type="checkbox"/>	7/16/20, 3:44 PM	7/16/20, 3:44 PM	[Icons]

By default, the **Apply Filter?** checkbox is selected when a **Custom Filter** is added. If you do not want the **Custom Filter** to influence what **Patient Adherence Alerts** are created, unselect the **Apply Filter?** checkbox.

Editing Custom Filters

On the **Manage Filters** tab, you can edit an existing **Custom Filter** by either clicking the **Filter Name** or selecting the **Edit** button.

Filter Name	Apply Filter?	Creation Date	Modified Date	
Filter Name Search ...				
Preview All Applied Filters				
Weekly PDC with Adherence Exclusion	<input checked="" type="checkbox"/>	6/29/20, 12:07 PM	7/1/20, 3:09 PM	[Icons]
Self-Reminder Daily	<input checked="" type="checkbox"/>	6/29/20, 9:17 AM	7/1/20, 3:10 PM	[Icons]
SUPD and HRM PDC's	<input checked="" type="checkbox"/>	6/29/20, 9:16 AM	7/1/20, 3:10 PM	[Icons]
Adherence Exclusion PDC's Weekly	<input checked="" type="checkbox"/>	6/29/20, 9:15 AM	6/29/20, 9:17 AM	[Icons]

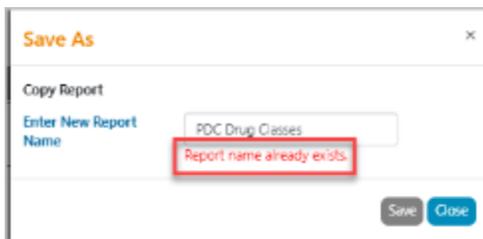
The process to edit **Custom Filters** utilizes the same steps as described in:

- ["Available/Selected Columns" on page 76](#)
- ["Add, Edit and Delete Filter Conditions" on page 77](#)

Saving Updated Custom Filters

As described previously, you have the option to edit any existing **Filter Conditions**, or, with the exception of the **Drug Class Filter Condition**, delete existing **Filter Conditions**. When adding or changing **Filter Conditions**, your work is saved incrementally as each action is completed. When you are satisfied with the **Filter Conditions**, select the **Done** button and you will be returned to the previous window.

Selecting the **Save As** button will open a dialog box, allowing you to enter a new **Custom Filter** name. Select the **Save** button once a new name is entered.



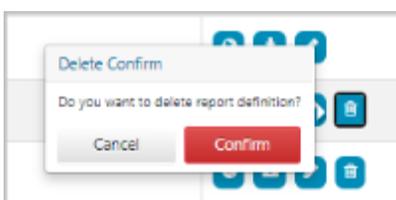
Note:
The **Custom Filter** name entered cannot match an existing **Custom Filter** name.

Deleting Custom Filters

Custom Filters that are no longer needed can be deleted by selecting the **Delete** button.

Filter Name	Apply Filter?	Creation Date	Modified Date	
Weekly PDC with Adherence Exclusion	<input checked="" type="checkbox"/>	6/29/20, 12:07 PM	7/1/20, 3:09 PM	[Icons: Refresh, Up, Down, Delete]
Both Reported Daily	<input checked="" type="checkbox"/>	6/25/20, 9:17 AM	7/1/20, 3:13 PM	[Icons: Refresh, Up, Down, Delete]
SUD and HRM PDC 6	<input checked="" type="checkbox"/>	6/25/20, 9:16 AM	7/1/20, 3:13 PM	[Icons: Refresh, Up, Down, Delete]
Adherence Exclusion PDC 6 Weekly	<input checked="" type="checkbox"/>	6/25/20, 9:15 AM	6/25/20, 9:17 AM	[Icons: Refresh, Up, Down, Delete]

Upon selecting the **Delete** button, a confirmation dialog will display.



Select the **Confirm** button to delete the **Custom Filter**.

Viewing Custom Filter Results

To ensure the accuracy of a **Custom Filter**, it is recommended that you review the list of patients that match the **Filter Conditions** by using either the "[Viewing Results Online](#)" below or "[Downloading Results to an Excel® Spreadsheet](#)" on the next page options. You can also review the list of patients that match all applied **Custom Filters** if desired.

Viewing Results Online

Custom Filter results can be viewed online by selecting the **View Online** button on the **Manage Filters** tab.

Filter Name	Apply Filter?	Creation Date	Modified Date	
Filter Name Search ...				
Preview All Applied Filters				
Weekly PDC with Adherence Exclusion	<input checked="" type="checkbox"/>	6/25/20, 12:07 PM	7/7/20, 3:09 PM	
Refill Reminder Daily	<input checked="" type="checkbox"/>	6/25/20, 9:17 AM	7/7/20, 3:13 PM	
SUPD and HRM PDC 6	<input checked="" type="checkbox"/>	6/25/20, 9:16 AM	7/7/20, 3:13 PM	
Adherence Exclusion PDC 6 Weekly	<input checked="" type="checkbox"/>	6/25/20, 9:15 AM	6/25/20, 9:17 AM	

Once the **View Online** button is selected the system will process the request. This may take several seconds, depending on the **Filter Conditions** that are applied. On the **Preview Filters** tab all the requests are displayed in descending order of **Submitted Date**, meaning the most recently submitted will be displayed at the top. The requests can be sorted by selecting the headers of the column names in ascending or descending order.

Filter Name	Submitted	Status	Expires	Row Count	Output
SUPD and HRM Filter	Jul 17, 2020, 7:15:37 AM	submitted	Jul 17, 2020, 7:15:37 PM		Processing online ...

To view the results online, select the **online** button. The results will be available for 12 hours from the **Submitted** date/time. At that point, the **Expires** date/time will be reached, and the results will no longer be accessible.

Filter Name	Submitted	Status	Expires	Row Count	Output
SUPD and HRM Filter	Jul 17, 2020, 7:15:37 AM	ready	Jul 17, 2020, 7:15:37 PM	500	online

The results will be displayed in table format under **Filter Results**. You can configure the number of rows that will be displayed per page using the **Items per page** drop-down. The **Next >>** and **<< Previous** buttons allow you to navigate pages.



Note:

The maximum number of rows that can be displayed online is 500. Additional **Filter Conditions** should be utilized in order to reduce the number of rows below 500. To view more than 500 rows, the report must be downloaded to Excel®, as described in "[Downloading Results to an Excel® Spreadsheet](#)" below.

Downloading Results to an Excel® Spreadsheet

Custom Filter results can also be exported to an Excel® spreadsheet by selecting the **Download Excel** button.

Filter Name	Apply Filter?	Creation Date	Modified Date
Weekly PDC with Adherence Exclusion	<input checked="" type="checkbox"/>	6/25/20, 12:47 PM	7/17/20, 5:49 PM
Health Newsletter Daily	<input checked="" type="checkbox"/>	6/25/20, 9:17 AM	7/17/20, 3:13 PM
SUPD and HRM PDC 6	<input checked="" type="checkbox"/>	6/25/20, 9:18 AM	7/17/20, 3:13 PM
Adherence Exclusion PDC 6 Weekly	<input checked="" type="checkbox"/>	6/25/20, 9:15 AM	6/25/20, 9:17 AM

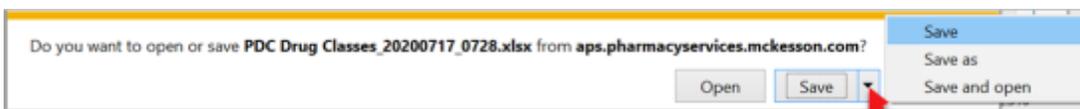
Once the **Download Excel** button is selected the system will process the request. This may take several seconds, depending on the **Filter Conditions** that are applied. On the **Preview Filters** tab all the reports are displayed in descending order of **Submitted Date**, meaning the most recently submitted will be displayed at the top. The reports can be sorted by selecting the headers of the column names in ascending or descending order.

Filter Name	Submitted	Status	Expires	Row Count	Output
PDC Drug Classes	Jul 17, 2020, 7:28:49 AM	submitted	Jul 17, 2020, 7:28:49 PM		Processing excel...
SUPD and HRM Filter	Jul 17, 2020, 7:28:05 AM	ready	Jul 17, 2020, 7:28:05 PM	11926	excel
SUPD and HRM Filter	Jul 17, 2020, 7:15:37 AM	ready	Jul 17, 2020, 7:15:37 PM	500	online

To view the results, select the **excel** button. The results will be available for 12 hours from the **Submitted** date/time. At that point, the **Expires** date/time will be reached, and the results will no longer be accessible.

Filter Name	Submitted	Status	Expires	Row Count	Output
PDC Drug Classes	Jul 17, 2020, 7:28:49 AM	ready	Jul 17, 2020, 7:28:49 PM	2369	excel
SUPD and HRM Filter	Jul 17, 2020, 7:28:05 AM	ready	Jul 17, 2020, 7:28:05 PM	11926	excel
SUPD and HRM Filter	Jul 17, 2020, 7:15:37 AM	ready	Jul 17, 2020, 7:15:37 PM	500	online

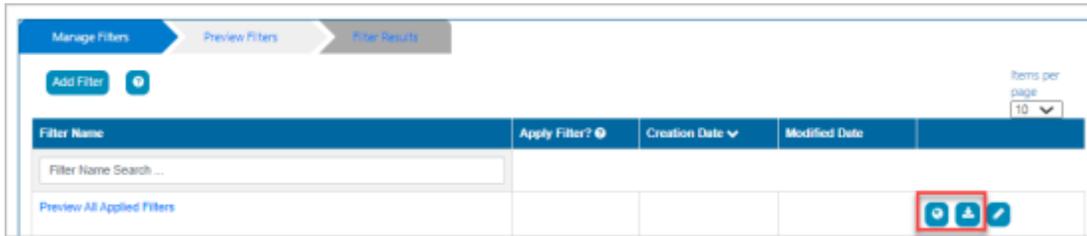
When the **excel** button is selected, a dialog box will appear prompting you to select what they want to do with the file. Follow the steps on your computer to download the file.



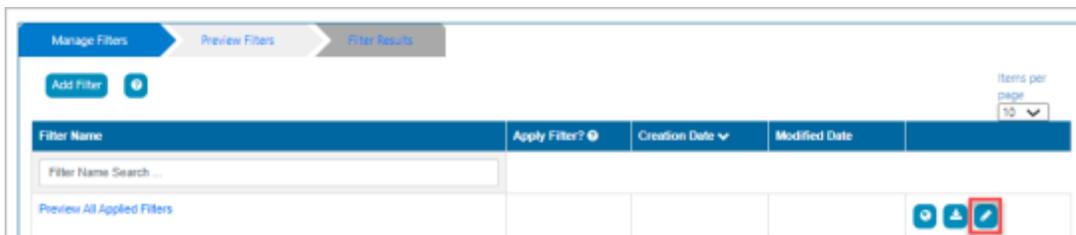
The download produces an Excel® spreadsheet that can be manipulated utilizing built in Excel® functionality.

Preview All Applied Filters

You can review the list of patients that match any **Custom Filter** with the **Apply Filter?** checkbox selected by using the **Preview All Applied Filters** options.



You can use the **View Online** and **Download Excel** buttons to view results for all applied **Custom Filters**. For more information, refer to ["Viewing Results Online" on page 83](#) or ["Downloading Results to an Excel® Spreadsheet" on page 84](#).



If desired, you can also edit the columns that display when viewing the results via the **Edit** button.

Viewing Patient Adherence Alerts in the CPS Clinical App

APS **Patient Adherence Alerts** will display in the CPS Clinical App when the patient is in context within the pharmacy management system.

MC MIKE SMITH

Alerts

Adherence Performance Solution

This Patient is non-adherent. Update the Patient's status using the APS Profile button below.

Patient Statistics (PDC 12)

0.84 CHOL		0.79 HYP	
--------------	--	-------------	--

Last Reviewed Date - Follow Up Date :

Drug Details

DRUG	RX#	LAST COVERAGE
ATORVASTATIN CALCIUM 20MG TABS (CHOL)	3486839	07/30/2020
LOSARTAN POTASSIUM 50MG TABS (HYP)	2579944	07/07/2020

Patient Notes

2020-07-17 - aps-np-admin (Phone)
Spoke to patient via phone

Severity: Low Expires: 07/22/2020

Received: 07/17/2020 3:28 PM

[APS Profile](#) [Resolve](#)

The following information is included in **Patient Adherence Alerts**:

- The patient's 6 or 12-month adherence score for each disease state. Disease states will only display within the message if the patient has a non-adherent score. These scores translate to percentages (so, for example, 0.76 is the same as 76%).
- A visual indicator to show how the patient is trending from their last measured PDC score. If an up arrow displays next to a disease state, then the patient's PDC score has improved since the previous month. Likewise, if a down arrow displays, then the patient's PDC score has declined since the previous month. If a flat line displays, then the patient's PDC score is the same as it was in the previous month.
- The APS Follow Up Date so that pharmacy staff knows when to check back in with the patient.

- The APS Last Reviewed Date so pharmacy staff knows when the patient was last contacted for their adherence.
- Drug details for the patient to assist with researching patient adherence.
- Patient Notes that exist in APS for the patient.
- Access to the APS Patient Profile via the **APS Profile** button. For more information on accessing the APS Patient Profile, refer to "[Opening the APS Patient Profile via Patient Adherence Alerts](#)" on the next page.

Viewing Patient Adherence Alerts in the CPS Task Queue

Another option to view APS **Patient Adherence Alerts** is to use the CPS Task Queue. The CPS Task Queue will provide insight into all **Patient Adherence Alerts** across all of your patients.

The screenshot shows the 'Task Queue' window in the 'MCKESSON Clinical Programs Solution' application. It features a 'Filter Tasks By:' section with various input fields for Patient Name, Program Name, Message Severity, Message Type, Date of Birth, Date/Time, Message Status, Due, Phone Number, Store Number, Message Text, and Expiration Date. Below the filters is a 'Filter Results' table with columns for Program Name, Message Text, Patient Name, Date Of Birth, Due, Message Type, Message Severity, Received Date, and Status. The table lists several adherence alerts for patients like REED, Max; WHITNEY, Kevin; MASON, Jaquima; BOYD, Mason; WRIGHT, Amalia; and CHANDLER, Liam.

Program Name	Message Text	Patient Name	Date Of Birth	Due	Message Type	Message Severity	Received Date	Status
Adherence Perfor...	This Patient is non-adherent. Update the...	REED, Max	12/29/1959	09/09/2019	Info	Low	09/09/2019	Unread
Adherence Perfor...	This Patient is non-adherent. Update the...	WHITNEY, Kevin	11/15/1957	09/09/2019	Info	Low	09/09/2019	Unread
Adherence Perfor...	This Patient is non-adherent. Update the...	MASON, Jaquima	11/11/1956	09/10/2019	Info	Low	09/09/2019	Unread
Adherence Perfor...	This Patient is non-adherent. Update the...	BOYD, Mason	09/13/1946	09/10/2019	Info	Low	09/09/2019	Unread
Adherence Perfor...	This Patient is non-adherent. Update the...	WRIGHT, Amalia	04/24/1974	09/10/2019	Info	Low	09/09/2019	Unread
Adherence Perfor...	This Patient is non-adherent. Update the...	CHANDLER, Liam	12/08/1953	09/10/2019	Info	Low	09/09/2019	Unread
Adherence Perfor...	This Patient is non-adherent. Update the...	WHITNEY, Kevin	11/15/1957	09/09/2019	Info	Low	09/09/2019	Unread

To view additional information for a particular **Patient Adherence Alert**, select the row within the CPS Task Queue to open the **Clinical Program Message Detail** screen. The message content displayed within the **Clinical Program Message Detail** screen is the same content that displays when viewed using the CPS Clinical App.

MCKESSON Clinical Programs Solution About Help

Clinical Program Message Detail

Adherence Performance Solution Patient Name: SMITH, MIKE
Date of Birth: 12/25/1999
Phone Number: 111-222-3333
Store Number: 5885

Adherence Performance Solution
This Patient is non-adherent. Update the Patient's status using the APS Profile button below.

Patient Statistics (PDC 12)

0.84	↑	0.79	↓
CHOL		HYP	

Last Reviewed Date: Follow Up Date:

Drug Details

DRUG	RX#	LAST COVERAGE
ATORVASTATIN CALCIUM 20MG TABS (CHOL)	3486839	07/30/2020
LOSARTAN POTASSIUM 50MG TABS (HYP)	2579944	07/07/2020

Patient Notes

2020-07-17 - aps-ep-admin (Phone)
Spoke to patient via phone

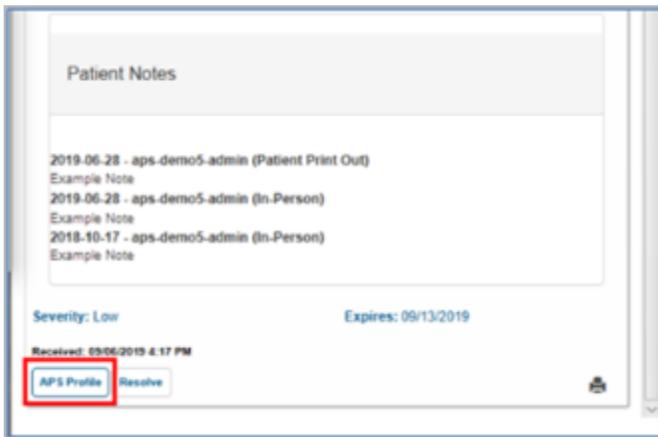
Received: 07/17/2020 3:28 PM Severity: Low Expires: 07/22/2025

[APS Profile](#) [Resolve](#) [...](#) Save Cancel

Opening the APS Patient Profile via Patient Adherence Alerts

The APS Patient Profile provides additional adherence information on a patient. For this reason, you can easily open the APS Patient Profile directly from an APS **Patient Adherence Alert** in CPS.

To launch the APS Patient Profile, first open the APS **Patient Adherence Alert** using either the CPS Clinical App or Task Queue. Next, select the **APS Profile** button.



Selecting the **APS Profile** button will initiate the single sign on process between CPS and APS. Once the single sign on process is successful, the patient in context’s profile in APS will open in the default browser without you having to enter any additional credentials.



Note:

If a system error is encountered during the single sign on process, the APS login page will open in the default browser.

After launching APS via a **Patient Adherence Alert**, you will only have access to the patient in context’s profile in APS. To navigate to other APS screens, select the **LOGIN TO APS DASHBOARD** link to open the APS login page.



Note:

You will need to close the APS Patient Profile in order to select the **LOGIN TO APS DASHBOARD** link.