![HealthCatalyst]

Charlie for Refill Management

Charlie is the healthcare industry's most trusted, most used prescription renewal delegation engine
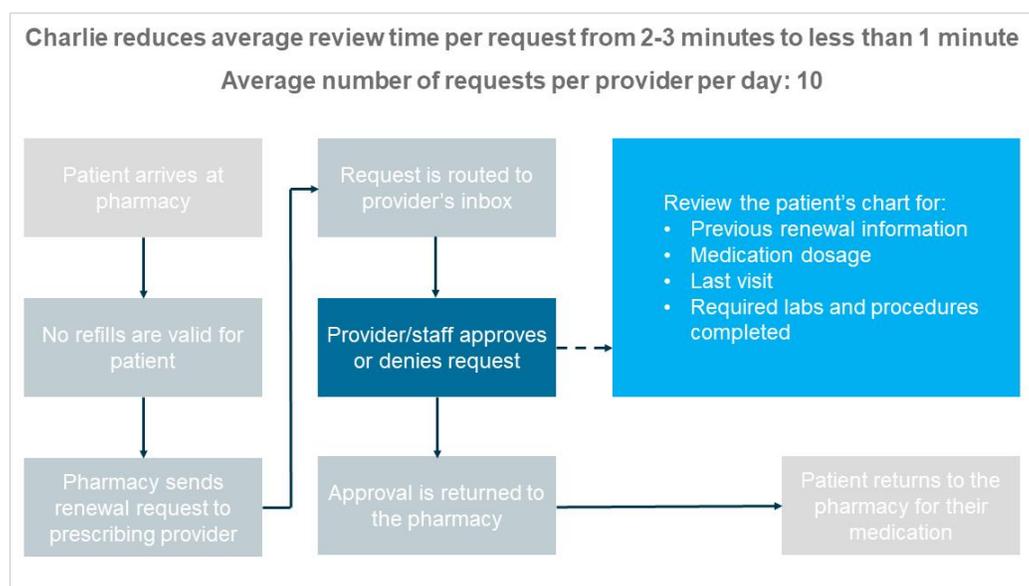
Type: Software Application   **ID:** 3649   **Revised:** 2020-11-05

![healthfinch by HealthCatalyst]

The Healthfinch® by Health Catalyst: Charlie™ for Refill Management application by provides embedded medication renewal decision support directly in the EHR workflow, allowing providers and their staff to streamline prescription renewal workflows. Charlie's combination of technology, protocol content, and workflow optimization enable health systems to deliver a better, safer patient experience.

When a renewal request is received, Charlie reviews the patient chart for relevant data and compares it against more than 1,000 protocols to determine whether the request is safe to renew. Charlie then summarizes data from the patient's chart and recommends next steps (e.g., approve the renewal, follow up with the patient to close care gaps, etc.).

Note: Charlie for Refill Management is Acquired Technology and NOT included in the Technology Access subscription unless otherwise noted in an order form.

Charlie for Refill Management automatically reviews patient charts for relevant renewal data, thus eliminating the need for manual review and reducing processing time per renewal from 2+ minutes to less than 1 minute.

The problem

Health systems often see inconsistent renewal processes between departments, providers, and other clinical staff. This misalignment results in inefficient workflows and can create confusion. Prescription renewal tasks often require additional follow up, which reduces the time available for patient care and increases the risk of provider burnout. Challenges include poor use of physician and staff time, inability to consistently and effectively delegate refill tasks, delayed response time to patients, and increased error rates in medication management.

Intended users

- Registered nurses
- Medical assistants
- Licensed practical nurses
- Pharmacy technicians
- Physicians

Potential data sources

- EMR - Clinical
- Billing
- Clinical Specialty

Key measures

- Refill turnaround time
- Delegation rate
- Processing time per renewal request
- Provider to staff support ratio
- Closed care gaps percentage
- Number of renewals per staff member per day

Success stories

For examples of how customers have used Health Catalyst products and services to improve outcomes, visit https://www.healthcatalyst.com/knowledge-center/success-stories/

Our approach

The Healthfinch team develops and maintains a library of medication protocols based on the latest industry recommendations and guidelines. These protocols provide a starting point for consensus discussions, and the Healthfinch team works with healthcare systems to customize the protocols to align with the organization's standard of care. Protocol criteria include dosage, controlled substance rules, care gaps (e.g., overdue office visits and missing labs), and more.

Training and ongoing check-ins with a dedicated customer success representative help ensure that protocols and workflows are performing as intended. Healthfinch updates protocols on request or based on the release of new guidelines. By continually monitoring over 40 of the leading guidance sources (JAMA, FDA, CDC, American Diabetes Association, American Heart Association, etc.), the Healthfinch team can make timely recommendations for protocol changes that may impact an organization's workflows and safe delivery of care.

Benefits and features

- **Save provider time—and reduce provider burnout –** Reduce the number of renewal requests needing provider review by up to 60 percent. Charlie is fully embedded in the EHR workflow and promotes safe delegation of requests from providers to staff.

- **Automate documentation in the EMR –** After reviewing each request against the appropriate protocol, Charlie publishes a note with recommendations right in the EHR workflow. Staff completing the request immediately know if the renewal meets protocol criteria, has care gaps, can't be delegated from providers (e.g., controlled substances), is a duplicate, or has errors (e.g., wrong dosage, not on active medication list, etc.).

- **Increase quality through standardization –** Charlie provides over 1,000 evidence-based, customizable prescription renewal protocols, which enables consistent care delivery across a health system and positively impacts quality measures.

- **Proactively identify care gaps and increase revenue –** Referencing the evidence-based protocols, Charlie identifies outstanding care gaps (e.g., missing labs, past-due visits, etc.) for a patient's active medications at the time of any prescription renewal, and alerts the staff member completing the request so that care gaps can be closed.

Use cases

- **A healthcare system** wanted to offload tasks from clinicians so that staff could operate at the top of their license and focus on the patients in front of them. Its goal was to centralize the refill service and to delegate these routine tasks to nonclinical technicians. The team found that Charlie for Refill Management helped them achieve that goal. Today, more than 65% of the healthcare system's refills are processed by nonclinical technicians, and technician efficiency has increased threefold.

- **A patient-centered medical home** was looking for a way to consistently create capacity for its medical assistants to spend more time with patients before every provider visit. Prescription renewal workload had grown, reaching 10,000 requests per month. Though medication protocols were in place, they were not consistently followed and created a liability for the organization. As a solution, Healthfinch implemented Charlie for Refill Management to standardize and delegate much of the renewal process. The results: 60% fewer requests sent to providers, 30 refills processed per hour, and turnaround time reduced to 24 hours.