

Personalized Learning Plan

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AIS-3070 Applied Professional Writing

Dr. Sonja L. Andrus

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Introduction

The purpose of this personalized learning plan is to explore the different ways to communicate in my chosen career field of specialty pharmacy. When first beginning the Applied Professional Writing class, I was unsure of the terms used and the concepts around them. Audience, genre, and purpose were just words that I knew the basic definitions of. However, I quickly came to understand that when we communicate, we are using the terms every day, in many ways without even realizing it. This made the class and the concept behind it much easier to maneuver.

For the purpose of picking different types or genres of workplace communication, I chose to interview my director, Behlan Ersoy. She has been in her position as Director of Specialty Pharmacy with Bon Secours Mercy Health (BSMH) for five years. During that time, she has seen the department grow exponentially. Although I do not necessarily see myself aspiring to reach the level she has within our ministry, I do plan to pursue a management position with BSMH once I complete my bachelor's degree. I have already been taking internal management training courses at the encouragement of Behlan.

I am certain that the experience I am gaining in my current position, along with everything I have learned and continue to learn at the University of Cincinnati, I will be more than prepared and qualified to reach my future career goals.

Below are several different types of genres that we use daily in specialty pharmacy. They span audiences types of coworker, patient, provider, and external sources.

TO: Dr. Sonja Andrus
FROM: Julie Anagnostou
DATE: February 12, 2023
SUBJECT: AIS3070 Applied Writing- PLP Proposal Memo

My Personalized Learning Plan will include questions and answers, as well as advice, provided to me by Behlan Ersoy during our interview. She holds a position similar to one I would like to obtain once I finish my degree.

Some of the questions include these:

- What is your educational background?
- How many years have you worked in this field?
- What type of writing do you do most often?
- What part of writing do you find most difficult?
- How do you manage and prioritize your deadlines?
- What advice can you give with managing the different aspects of writing as a manager?

Additionally, I will feature these types of communications:

- Emails
- Teams messaging
- Zoom meetings
- Power Point presentations
- In-person/phone interactions

She stated that she uses emails most often, followed by Power Point. She gave me several tips on how to more effectively get through all the writing required in a leadership role. I hope that some of the information I have learned will help me to better a communication and a successful leader one day.

Timeline:

- I plan to finish my interview by 2/17
- My plan is to work on my introduction and interview the week of 2/13
- I will work on E-mails and Teams messaging the week of 2/20
- I will work on Power Point presentations the week of 2/27
- I will work on Zoom meetings the week of 4/3
- I will work on In-person and phone interactions the week of 4/10
- I will work on my conclusion and proof-reading the week of 4/17
- I will submit my completed PLP by 4/24

By focusing on one type of communication each week, this will allow me time to work on each type of communication, as well as complete other school assignments.

Interview

I interviewed Behlan Ersoy, Director of Specialty Pharmacy, at my current employer. Because my future career goal is to manage a department, I felt it would be good to speak with her regarding the various ways she communicates in her position. She also serves as my mentor at work and has been very supportive of me and my pursuit of earning my bachelor's degree.

Q: What is your educational background?

A: I have a Bachelor of science, I'm a Registered pharmacist, and board certified in specialty pharmacy.

Q: How many years have you worked in this field?

A: Since 2005, so 18 years.

Q: What type of writing do you do most often?

A: Emails and PowerPoint

Q: Who is your target audience?

A: Providers and their staff, my direct reports, my colleagues

Q: What is the purpose of your communications?

A: Relay a message. Share important information with my reports or other management.

Respond to a request from someone else. With PowerPoint, share graphs and data of department performance.

Q: What part of writing do you find most difficult?

A: Anything that is time consuming and where I must gather my thoughts to create effective communication. Speaking is easier than having to be in front of a computer. Time is so important. Speak to type would be so much easier and I lose a lot of time traveling for work. Getting so many communications is also difficult. Speaking Turkish and English, I need to proofread more to make sure it sounds good in English.

Q: How do you manage and prioritize your deadlines?

A: I love deadlines. I like dates for projects. Being the one person assigned to a project is better than a group assigned project. I check my calendar at least a week in advance and work on first due, not the biggest due. I look at what is needed and see if I can reuse something that I have used before. I limit my emails to only 3 paragraphs if possible because they are too long to read, and you may lose the point. Less is more. With a larger group, everything may not apply to them all and need to know how to tailor to them all.

Q: What advice can you give with managing the different aspects of writing as a manager?

A: My biggest advice is to drop the background story. We are excited to share but it is not suitable for emails. No long emails. Save for a meeting. Longer means you will not be read it all and you may not get an immediate response. If you need something taken care of, be very specific, nice, but add objectives. Give what you need first. Then extra information. More specific, no fire drills. People are more responsive. Sometimes email is not the best, pick up the phone, and use if urgent.

Email #1: Coworker

TO: Sarah Reynolds

FROM: Julie Anagnostou

DATE: February 13, 2023

Subject: Secure-Williams

Sarah,

Patient Jane Williams 8/12/1955 Piqrav

Can you please make sure the patient is contacted today and her delivery is scheduled as soon as possible? She only has 4 days of medication left.

Thank you!

Julie Anagnostou, AAS, RHIT, CPhT

Specialty Pharmacy Liaison Supervisor

Audience: Sarah Reynolds

Genre: Email

Purpose: The purpose of this email is to make sure the patient is contacted, and delivery of her medication is scheduled as soon as possible.

Email #2: Provider

TO: Dr. Mark Johnson
FROM: Julie Anagnostou
DATE: February 13, 2023
Subject: Secure-Williams

Dr. Johnson,

Patient Jane Williams 8/12/1955 Piqrav

We were able to reach the patient and her medication is scheduled for delivery on Wednesday 2/15/23. Her copay is \$0.

Please let me know if you have any further questions.

Thank you!

Julie Anagnostou, AAS, RHIT, CPhT

Specialty Pharmacy Liaison Supervisor

Audience: Dr. Mark Johnson

Genre: Email

Purpose: The purpose of this email is to inform the provider that the patient was contacted, and when her medication delivery is scheduled to be delivered to her. This enables the office to schedule follow-up appointments with the patient after they are taking the medication.

Email #3: Third Party Vendor

TO: Amy Templeton

FROM: Julie Anagnostou

DATE: February 13, 2023

Subject: Secure-Williams

Amy,

Patient Jane Williams 8/12/1955 Piqrax

Thank you so much for your assistance in getting the patient enrolled in foundation assistance.

Both the patient and Dr. Johnson are very appreciative of your quick response and understanding of the patient's needs.

Thank you again!

Julie Anagnostou, AAS, RHIT, CPhT

Specialty Pharmacy Liaison Supervisor

Audience: Amy Templeton

Genre: Email

Purpose: The purpose of this email is to thank Amy for her help in getting the patient enrolled in foundation assistance, so she has no copay for her medication. Patient copay is the biggest obstacle for patients to begin necessary treatments, in this case this hypothetical patient has breast cancer.

Phone call #1: Coworker

Sarah: Julie, it's Sarah.

Julie: Hi Sarah, what can I do for you?

Sarah: I have a patient on the phone asking to speak with you.

Julie: Okay, what is their name and date of birth?

Sarah: Sure, it is Bobby Stevens, and his date of birth is 7/16/1949.

Julie: Okay, did he say why he is calling?

Sarah: He is asking about his copay. He said you left him a voicemail.

Julie: Okay, you can transfer him. Thanks.

Sarah: Here he comes.

Audience: Sarah Reynolds/Julie Anagnostou

Genre: Phone call

Purpose: The purpose of this call is to transfer a patient to me that is returning a voicemail that I left for him. Many patients call into a main number and are then transferred to me, this is a very common conversation example. While we have direct phone extensions, we often give the main phone number so patients are ensured of speaking directly to a person. I am on phone calls much of my day, and the ability to prevent unnecessary voicemails is helpful to me and helps to make the patient have a more personal experience while we are helping them navigate the specialty medication process.

Phone call #2: Patient

Julie: This is Julie, can I help you?

Bobby: Hi, this is Bobby Stevens. I'm returning your call. You left me a voicemail that I have a high copay and to call for your help with this.

Julie: Yes, can you please verify your date of birth for HIPAA?

Bobby: Sure, it is 7/16/1949.

Julie: Thanks Bobby. Yes, your copay is \$1523.43. However, there is a foundation than will cover the cost, so your copay will be zero. I just need your permission to apply.

Bobby: Yes, that would be great.

Julie: Of course. I just need your household size and annual income.

Bobby: My household is just me and my income is \$17,350.

Julie: Perfect. Let me just get the enrollment processed and I will give you a call back to let you know when the medication can ship.

Bobby: Thank you so much.

Julie: You are very welcome. You will hear back from me soon. Have a good day.

Bobby: Thanks, you as well. Bye!

Audience: Bobby Stevens/Julie Anagnostou

Genre: Phone call

Purpose: The purpose of this call was the patient was calling back to get help with his copay.

This is a very common type of phone call and happens several times each day. There are many foundations that give grant money to patients to help cover the cost of their medications. They may also help with other expenses such as gas money to drive to appointments.

Phone call #3: Third Party Vendor

Julie: Hi, Amy. This is Julie Anagnostou, and I am calling to enroll a patient in foundation assistance.

Amy: Of course, what is the patient's name and date of birth?

Julie: His name is Bobby Stevens, and his date of birth is 7/16/1949.

Amy: What is his diagnosis and the name of the medication?

Julie: His diagnosis is C91.10 Chronic Lymphocytic Leukemia and the medication is Venclexta 100mg.

Amy: Thank you, and what is his household size and annual income?

Julie: His household size is one and his income is \$17,350.

Amy: Great, thanks for that information. It looks like we can approve him for a \$10,000 grant. I will email you the payment information.

Julie: Thanks so much Amy! I really appreciate all your help.

Amy: Of course, let me know if you need anything else.

Julie: I will. Thanks again!

Audience: Amy Templeton/Julie Anagnostou

Genre: Phone call

Purpose: The purpose of this call is to enroll the patient in foundation assistance to cover the cost of his copay. Most of the time you can enroll patients through foundation websites. However, occasionally, you need to call to do an enrollment. This tends to be a straight-forward process.

Phone call #4: Patient

Bobby: Hello?

Julie: Hi Bobby, this is Julie calling you back.

Bobby: Hi, Julie did you have any luck?

Julie: Yes, I did. First, can you please verify your date of birth for HIPAA?

Bobby: Sure, it is 7/16/1949.

Julie: Thanks. I was able to get a grant for you for \$10,000.

Bobby: Wow, that is great.

Julie: Yes, that should cover about six months' worth of medication.

Bobby: What do we do then?

Julie: We will look for another grant before this runs out. If we can't find one, then we will begin the free drug application through the manufacturer.

Bobby: Okay, and you will help me with that also?

Julie: Yes, of course. Don't worry, we will make sure you continue to get your medication.

Bobby: Thanks for your help.

Julie: Any time Bobby. If you have any questions, please let me know. I will get you transferred to a technician to get your delivery scheduled.

Audience: Bobby Stevens/Julie Anagnostou

Genre: Phone call

Purpose: The purpose of this call is to inform the patient that he was approved for foundation assistance. It also served the purpose of transferring him to a technician so she can schedule his medication delivery.

Teams message #1: Coworker

JA

Sarah, can you please call patient AW 2/22/2000 and verify her address and payment information?

SR

Sure. Did you also want me to schedule delivery?

JA

Hold off until I hear back from the office. I need to make sure when they have her induction scheduled.

SR

Will do. I can also ask her if she knows when her induction appointment is scheduled.

JA

Thanks, that would be great!! 😊

SR

YW 😊

Audience: Sarah Reynolds/Julie Anagnostou

Genre: Teams message

Purpose: The purpose of this Teams message is to have the technician contact the patient, then verify her address and payment information. She will ask the patient when her induction is scheduled. One important reminder for Teams messaging is that it is not considered secure by HIPAA standards. This means you can't send PHI, or full identification, of patients through messaging. We typically use initials, date of birth, or even medical records numbers (MRN).

Teams message #2: Provider

JA

Shelly, for patient E2311470, can you see when her induction dose is scheduled?

SW

Sure. Give me one minute. Is that for Stelara?

JA

Thanks! Yes, it is.

SW

Looks like we have her scheduled for 0745 on 3/27/23, at the Boardman location.

JA

Great! Thanks so much.

Audience: Shelly Waters, RN/Julie Anagnostou

Genre: Teams message

Purpose: The purpose of this Teams message is to verify if the provider has the patient scheduled for her induction dose of Stelara. This helps the pharmacy to know when to schedule delivery of

her maintenance medication because she will need it eight weeks after her IV induction dose.

This information can be relayed back to the technician so when she calls the patient, she knows to schedule delivery around six weeks post-induction. It also gives a window of time to make sure the patient does not have a reaction to the medication, and that she is experiencing a positive response to the medication. If treatment needs to be changed or adjusted, there is time to do that before shipment.

Teams message #3: Department Memo

Specialty Team

Team, in case you are not aware, we are predicted to have severe weather over the next 72 hours.

Models are showing 12" + inches of snow, as well as icy conditions, followed by lower than normal temperatures.

Due to this, we are implementing a mandatory Work from Home policy for the remainder of the week.

Please make sure you take your laptops, charging cords, headsets, and any other materials you need to complete your daily tasks.

Remember to clock in/out as normal.

Unless otherwise stated, all scheduled Zoom meetings will continue as planned.

Please let leadership know if you have any questions.

Thank you!

Management

Audience: All the Specialty Pharmacy team members

Genre: Memo via Teams message

Purpose: The purpose of this memo, sent via Teams, is to notify the department of a change in work policy. This is due to inclement weather that is expected for several days. All department members have laptops and work remotely 2-3 days per week on a typical workweek. The leadership always encourages the employees to stay safe. By making this policy decision early, it enables everyone time to gather anything they need to work from home for many days. It also eliminates the need of each employee asking permission to stay home due to weather.

In-person #1: Coworker

Julie: Brad, I need you to write an appeal letter for Matthew Smith, for his Vumerity.

Brad: Sure thing, why was it denied?

Julie: It is non-preferred on his plan. But his insurance just changed last month, and he has been taking the Vumerity for over two years.

Brad: Has he tried other therapy before that?

Julie: Yes, he tried Avonex, but he had injection site necrosis. He also tried Glatiramer, but it caused severe nausea.

Brad: Okay, I will let you know when the letter is finished so you can have the doctor review it and sign it.

Julie: Thanks Brad!

Audience: Brad Ford, Rph/Julie Anagnostou

Genre: In-person conversation

Purpose: The purpose of this conversation was to ask the pharmacist to write an appeal letter for a patient whose prior authorization was denied. Each insurance company establishes a formulary of preferred and non-preferred medications. They also create criteria of requirements that must be met for the insurance plan to cover the cost of the medication. In this case, even though the requested medication is non-preferred, the patient was already established on therapy when he joined the new plan. To ensure continuation of therapy, an insurance plan will typically make an exception and allowed the patient to continue with the non-preferred option.

In-person #2: Provider

Julie: Dr. Johnson, I need you to sign this appeal letter for a patient.

Dr. Johnson: Which patient?

Julie: Matthew Smith, for his Vumerity.

Dr. Johnson: Why did the insurance deny the prior authorization?

Julie: It is non-preferred on his plan, but this is a new insurance for him, and we are stating that he has been successfully taking the Vumerity for two years without any issues or progression.

Dr. Johnson: Thanks, here you go. Let me know if you need me to do anything else to get this approved. I can always do a Peer-to-Peer if the insurance wants.

Julie: Thanks Dr Johnson. I will let you know what they say.

Audience: Dr. Johnson/Julie Anagnostou

Genre: In-person conversation

Purpose: The purpose of this conversation is to have the doctor sign an appeal for a patient's medication. The prior authorization was denied due to being non-preferred on his insurance plan. This happens often. In this situation, the patient has been established on treatment, but his insurance plan has changed. Based on plan guidelines, the patient needed to try at least two preferred medications before a non-preferred would be approved. But, because he was already established on therapy, the original denial should be overturned.

PowerPoint sample

Benefit Investigation Analysis

Plan access: May 1st-June 23rd 2022 test claim results (all Rxs)



Plan Access "N": 175 claims

- Some access challenges are group specific
- Top plans HSSP unable to fill
 - ESI, CRK, CareSource, Aetna, OptumRx & Med B Plans
- **Top plans HSSP filled:**
 - Anthem, WellCare, UHC, Humana, EnvisionRx/Elixir

Audience: Specialty Pharmacy employees

Genre: PowerPoint

Purpose: The purpose of this PowerPoint slide is to show the breakdown of data that was collected from one practice. It shows the total number of test claims that were performed. It also explains the reasons for either filling or not filling patient prescriptions. As you can see from this slide, the greatest barrier to filling prescriptions was lack of plan access, followed by lack of drug access. This is something that pharmacies struggle with daily. It also helps the decide where to focus their efforts on gaining more access to plans or medications.

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Email: External Specialty Pharmacy

TO: Nick Jeffreys

FROM: Julie Anagnostou

DATE: March 29, 2023

Subject: Secure

Nick,

Patient Ronald Miller 11/24/1982 Epclusa

Can you please verify if the patient's medication has shipped?

Which location is the medication shipping from?

Also, what was his copay?

Thank you!

Julie Anagnostou, AAS, RHIT, CPhT

Specialty Pharmacy Liaison Supervisor

Audience: Nick Jeffreys, Rph

Genre: Email

Purpose: The purpose of this email to verify if an external pharmacy has shipped a medication to a patient. We are also asking the amount of his copay and which facility shipped the medication.

We use a central CVS location for all prescriptions to be sent. From that point, it is determined based on medication, insurance plan, and state of residence which facility needs to ship the medication. We also use this email method in case the pharmacy is unable to reach the patient.

We then contact the patient and advise them to call and schedule delivery.

Conclusion

Effective communication is crucial in the workplace. This is true regardless of if you are in an entry-level position or the President of a company. You must be able to communicate in a clear and concise manner, or mistakes and misunderstandings will occur. I am very fortunate to have a director that is always open to communication, and she shares with us ways to be better communicators. This is especially true in the healthcare field. You must be able to effectively communicate with persons of many diverse backgrounds, education levels, and differing degrees of medical knowledge.

The examples I have shared in this personalized learning plan are all representative of what I see daily. I can be more informal with coworkers, as opposed to a medical provider. I also must be able to tailor the words that I use to ensure my patients understand the information that needs to be given to them. There are so many different steps that must happen between the time the provider orders the medication for the patient until the time the patient physically has the medication in their possession. For many of the patients, they have just been diagnosed with a life-altering disease, are overwhelmed, and do not know where to begin in obtaining their medication.

It is my hope, that through the examples I have provided, anyone reading this document would be able to understand the concepts of audience, genre, and purpose. I have learned so much this semester. I know that it will help me to be a much better communicator.