

Q1 Pharmacy Check List

Kickstarting 2026: A high-level pharmacy checklist

As pharmacies continue to engage in value based clinical care gap closure initiatives, having a standardized plan ensures that nothing falls through the cracks during the Q1 transition.

Key Features:

EQUIPP®, EQUIPP Copilot™, EQUIPP Academy, Knowledge Base, CE Impact

GETTING STARTED

Step by Step Instructions

Step 1

- Ensure access to EQUIPP/Copilot Dashboard (Login correct, link for the EQUIPP platform)
- Review 2025 Outliers

Education Overview

Step 2

- Utilize education platforms to get up-to-date info to be prepared for 2026

Preparing for 2026

Q1 Window

Q1 is your window to align your staff, clean up your data, and target high-risk patients before “gap-closing” becomes a race against the clock by the end of year.

CHECKLIST**Pharmacy Alignment**

Task	Date	Status
<input type="checkbox"/> 2026 Kickoff	_____	_____
<input type="checkbox"/> EQUIPP/Copilot	_____	_____
<input type="checkbox"/> Clinical Interventions	_____	_____

2026 Kickoff

- Review pharmacy performance for previous year.
- Ensure staff members understand outcomes.
- Establish a “EQUIPP Champion” to track weekly progress on metrics and Enhanced Services.

EQUIPP Copilot

- Logins: Ensure logins are correct and updated to match who is currently in the pharmacy working within EQUIPP/Copilot
- Schedule DEMOs to refresh knowledge on platforms/for new users.
- Review Outlier Report from previous year to start initial contact list for quarter one.
- Review Outlier Template

Clinical Interventions (Q1 Focus)

- Longitudinal Adherence Monitoring (LAMP):** Navigate to the Enhanced Services tab (the bullseye icon). Identify patients eligible for the LAMP program and document your initial Q1 outreach. This is especially important as some plan designs include a Q1 outreach to maximize your earning potential throughout the year.

- Document in “Enhanced Services” Immediately:** For programs like Controlling Blood Pressure or A1c Tracking, ensure documentation is completed within EQUIPP.

- Review “My Programs” tab** to identify patients who are outlined as an outlier.

Pharmacy Education Checklist

Task	Date	Status
<input type="checkbox"/> EQUIPP/Copilot Resources	_____	_____
<input type="checkbox"/> Measure Resources	_____	_____

EQUIPP Copilot Resources

Use the section to review the resources related to EQUIPP/Copilot. You can locate the resources in the area below.

- EQUIPP Academy

- EQUIPP Copilot Demo Training

- Copilot PSAO One Pager

Measure Resources

Use the section to review the resources related to EQUIPP/Copilot. You can locate the resources in the area below.

- EQUIPP Academy

- Knowledge Base

- CE Impact

The Discontinued Patient (The “Ghost” Patient)

Scenario: A patient appears on your adherence report for a specific class (e.g., Statins or RAS Antagonists), but they haven't filled or are no longer taking the medication

Step	Actionable Execution
1. Script Status Audit	Check the Profile: Is there a newer script for a different drug in the same class? Or a “Discontinued” note from the provider? If discontinued, please DO NOT FILL at all in 2026.
2. Transfer/Deceased Check	Run a quick check: Did they transfer out? If so, delete the active refill reminders to stop them from appearing on “Late-to-Fill” reports.
3. Payer/Platform Sync (EQUIPP/Copilot/PMS)	In EQUIPP, document appropriate Opportunity Status to help your pharmacy keep track of outliers, and mark additional notes in the Pharmacy Management System as needed.
4. Inventory Cleanup	If a specialty med was being held/ordered for them, return it to stock or the wholesaler immediately to free up cash flow.

Potential Documentation in Pharmacy Management System

Reason/Scenario	Intervention Note Template
Provider Discontinued	“Confirmed with the MD office on [Date] that therapy for [Drug Name] was discontinued on [Date]. Reason: [Clinical Success / Change in Therapy]. Requesting exclusion from adherence metrics.”
Side Effects	“The patient reported intolerable side effects ([Details]). Pharmacist consulted MD. Therapy switched to [New Drug]. Previous therapy marked inactive in PMS to prevent ‘late fill’ alerts.”
Hospitalization/Rehab	“Patient currently in [Facility Name] as of [Date]. Medication administration handled by the facility. Pharmacy sync/adherence paused until discharge.”
Patient Left Pharmacy	“The patient confirmed they are now using [Competitor/Mail Order]. Profile deactivated in system. Transfer of records completed on [Date].”

The Inconsistent Patient (The “Gap” Patient)

Scenario: The patient is still on the drug but fills it every 45 days instead of every 30. They are killing your Star Ratings.

Step	Actionable Execution
1. Identify the “Why”	Ask the Question: “I noticed you have about 15 days of medicine left over from last time. Are you finding it hard to remember the morning dose, or are you trying to stretch the supply to save money?”
2. Med Sync Trigger	Immediate Action: Align all their medications to a single pick-up date. This reduces “friction” and improves the likelihood of the outlier returning to the mean.
3. Packaging Pivot	If the outlier is “forgetful,” move them to Multi-Dose Strip Packaging or Blister Packs (if available). This turns a behavioral outlier into a compliant patient.
4. “The 80% Rule” Check (Use EQUIPP/Copilot)	Identify in EQUIPP if they can still hit a 80% PDC by the end of the measurement period. If not, they require a “High-Touch” intervention or a consultation with the Pharmacist.

Potential Documentation in Pharmacy Management System

Reason/Scenario	Intervention Note Template
Financial Barriers	“Patient admitted to skipping doses due to copay cost. Action: Applied [Coupon/Discount Card] and switched to [90-day supply] to lower per-day cost. The patient agreed to resume the daily schedule.”
Logistic Friction	“Patient late due to multiple trips to the pharmacy. Action: Enrolled in Med-Sync. All maintenance meds aligned to [Date] of each month. Added to ‘Sync’ call list for proactive
Health Literacy	“Patient misunderstood ‘once daily’ instructions. Counseled on importance of maintenance vs. PRN (as needed) use. Provided [Large Print Labels/Visual Aid]. The patient demon-
Forgetfulness	“The patient was identified as ‘low-adherence’ due to forgetfulness. Action: Moved to [Blister Packing/Strip Packaging]. Set up [SMS/App] reminders. Will follow up in 30 days.”

The Chronic/Seasonal Outlier (Sept - Dec)

Scenario: This is the “Full Court Press” section for high-impact Star Rating saves.

Step	Actionable Execution
1. The “Lock-In” Fill	Aim for a 90-day fill on September 1st. This mathematically “locks” their PDC (Proportion of Days Covered) through December 1st, bypassing the most volatile months.
2. Financial Triage	If the patient hits a coverage gap in Oct/Nov, provide a Manufacturer Trial Card or Discount Card immediately. Do not let them walk away without the med due to cost.
3. The “Dead-End” Audit	If the patient is an outlier for 3+ years and refuses all interventions (Sync, Packaging, Delivery), move them to a “Final Consultation” with the Pharmacist to determine if the drug class is even viable for them.

Online Tutorials or Video Guides

[EQUIPP](#)
[EQUIPP Dashboard Video](#)
[EQUIPP Copilot Demo](#)
[EQUIPP Academy](#)
[Knowledge Base](#)

CE Impact Resources

[CE Impact](#)
[CE Impact for HMA](#)

Download EQUIPP Copilot™

1. Login to the EQUIPP dashboard (equipp.pharmacyquality.com) at both the RPh Processing and Verification workstations
2. Click the “Download EQUIPP Copilot” button to begin the download process
3. Open the new application by clicking the orange ‘EQUIPP Copilot crown’ icon (Found in the right lower sidebar of your PMS or on your main desktop).
4. Log in to the EQUIPP Copilot application by selecting your current PSAO.

[DOWNLOAD EQUIPP COPILOT](#)

Start your free trial today.

January Task Tracker

February Task Tracker

March Task Tracker

April Task Tracker

May Task Tracker

2026 PLANNER

June Task Tracker

July Task Tracker

August Task Tracker

2026 PLANNER

September Task Tracker

October Task Tracker

November Task Tracker

December Task Tracker