

Salesforce Guide for Pfizer tracking

The purpose of this guide is to assist direct service staff with instructions for how to navigate Pfizer Rx Pathways resources on the Pfizer site and track client outcomes in Salesforce. This guide assumes users have a basic knowledge of Salesforce data entry. If this is not the case please refer to the general Salesforce guide first. Any additional questions about the Pfizer Rx Programs can be sent to Jackie Guzman via email: Jguzman@lisc.org. More information about the Pfizer Rx Pathways program is also available on their website: <https://www.pfizerxpathways.com/>

There are 5 programs available through Pfizer Rx Pathways:

Pfizer Patient Assistance Program - Provides free Pfizer medicines to eligible patients through their doctors' offices, at home, or—in some cases—directly at the pharmacy.

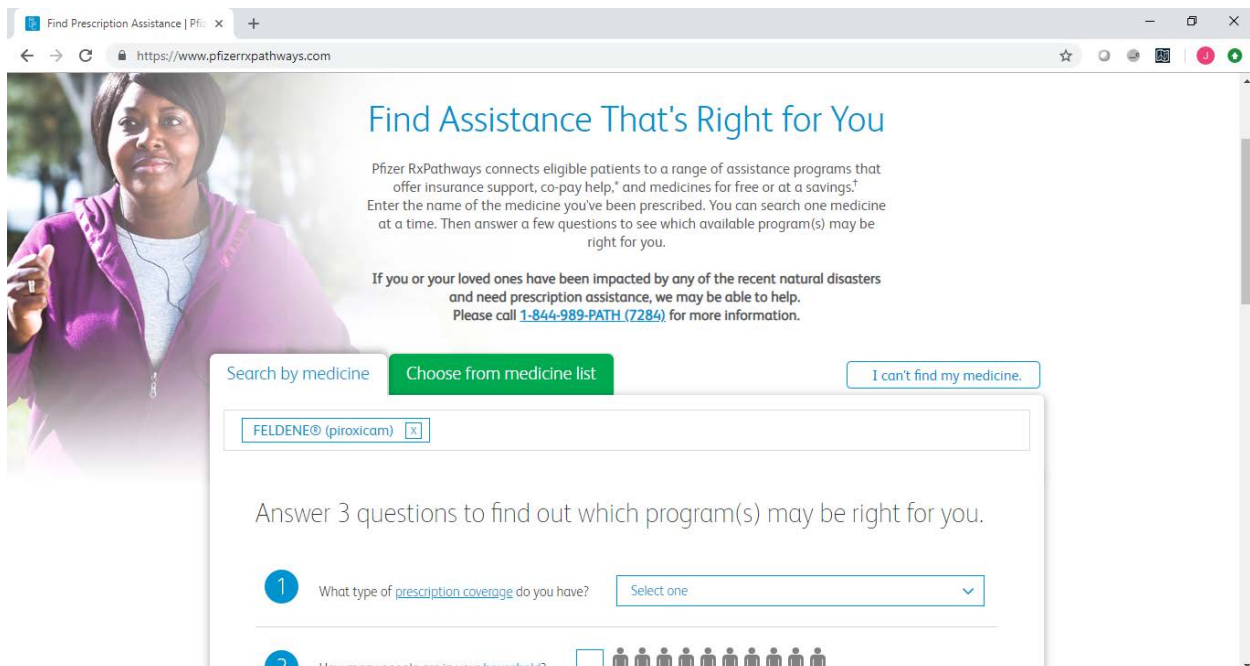
Pfizer Savings Program - Helps uninsured patients receive savings on more than 100 Pfizer medicines directly at their pharmacy, regardless of their income.

Pfizer Institutional Patient Assistance Program - Helps uninsured patients receive savings on more than 100 Pfizer medicines directly at their pharmacy, regardless of their income.

Treatment- Specific Patient Support Hubs - Some Pfizer medicines have support programs designed just for their patients. Select a medicine to learn more.

Co-pay and Savings Offers - Pfizer provides access to co-pay and savings cards to help eligible patients save on a variety of brand-name medicines, regardless of their income.

- 1) The first step is to navigate to the website (<https://www.pfizerxpathways.com/>)



Find Prescription Assistance | Pfizer

https://www.pfizerxpathways.com

Find Assistance That's Right for You

Pfizer RxPathways connects eligible patients to a range of assistance programs that offer insurance support, co-pay help,* and medicines for free or at a savings.* Enter the name of the medicine you've been prescribed. You can search one medicine at a time. Then answer a few questions to see which available program(s) may be right for you.

If you or your loved ones have been impacted by any of the recent natural disasters and need prescription assistance, we may be able to help. Please call 1-844-989-PATH (7284) for more information.

Search by medicine **Choose from medicine list** I can't find my medicine.

FELDENE® (piroxicam) [X]

Answer 3 questions to find out which program(s) may be right for you.

1 What type of prescription coverage do you have? Select one

2 How many people are in your household? [] [] [] [] [] [] [] [] [] []

- 2) Either search for a client’s medication or “choose from medicine list”, this will direct you to answer a quick questionnaire for your client. Complete this survey with your clients information and then click on “Find Available Programs”

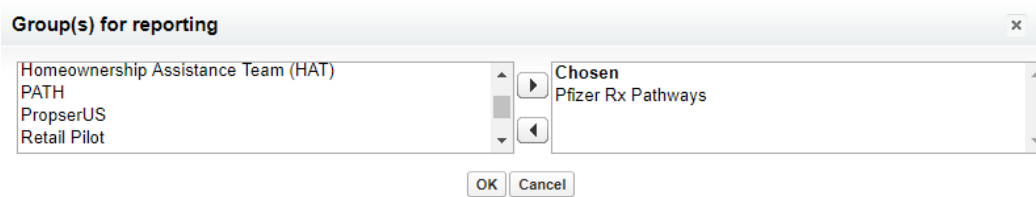
- 3) The results page will connect you to programs your client may be eligible for. From there you can download the application and complete with your client, print results or email them to be submitted at a later time. All application must be submitted via Fax.

Note: Programs are listed in order of greatest benefit to client.

In Salesforce:

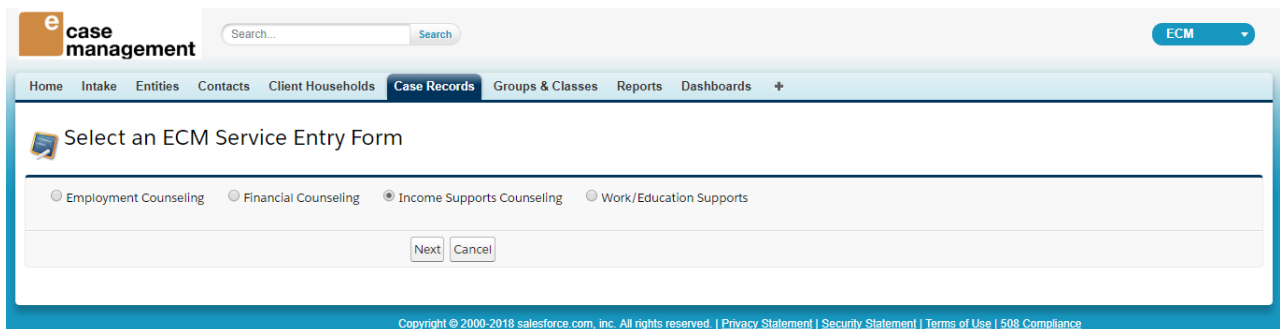
Once you have identified your client’s eligibility this should be tracked in salesforce for tracking.

- 1) Add your client to the “Group(s) for reporting” called “Pfizer Rx Pathways”. This is done by editing the client’s “case record” and navigating to “Group(s) for reporting”. Select the group you would like to add and move it to the “chosen” box.



- 2) Create an “Income Supports Counseling” service entry.

Note: Pfizer Institutional Patient Assistance Program is the only program that will be entered as an “Outbound Referral” instead of a service entry.



- 3) The Pfizer Rx Pathway programs can be under the “Medical Benefit/Health Insurance” story. Click the the story to open it up and enter “Pfizer” as the “Name of Entity”.
- 4) Choose the “Status” that applies (i.e Applied (or re-applied) , Approved (or re-approved), Discussed pros and cons)
- 5) Select “Type of medical benefit/subsidy” based on the program your client has applied for
Pfizer Patient Assistance Program = Non-state Prescription Assistance
Pfizer Savings Program – Non-state Prescription Discount Program
Treatment- Specific Patient Support Hubs – Treatment Specific Assistance
Co-pay and Savings Offers – Co-payment assistance

The screenshot shows the Salesforce Enterprise Edition interface. The browser address bar displays the URL: <https://c.na30.visual.force.com/apex/FOCISCoun1?caseRecordId=a0t36000003Wey2AAC&ecmConfigId=a1736000001cuPIAAY&ecmSAId=a1B36000001lbpZEA...>

The main content area shows a form for "Medical Benefit/Health Insurance". The form includes the following fields:

Client	UOS	Name of Entity	Status	Type of medical benefit/subsidy	Other type of benefit/Subsidy	Frequency of Payment/
Carrie Fake	0.00	Pfizer	--None--	--None--		--None--

Below the form, there are several sections for assistance programs, each with a dropdown arrow:

- Other Non-Recurring Assistance (cash or non-cash)
- Recurring Cash Assistance/Payments
- SNAP (food stamps and comparable programs)
- Subsidized Housing
- Unemployment Compensation
- Utility Assistance
- WIC (Women, Infants & Children)

The "Type of medical benefit/subsidy" dropdown menu is open, showing the following options:

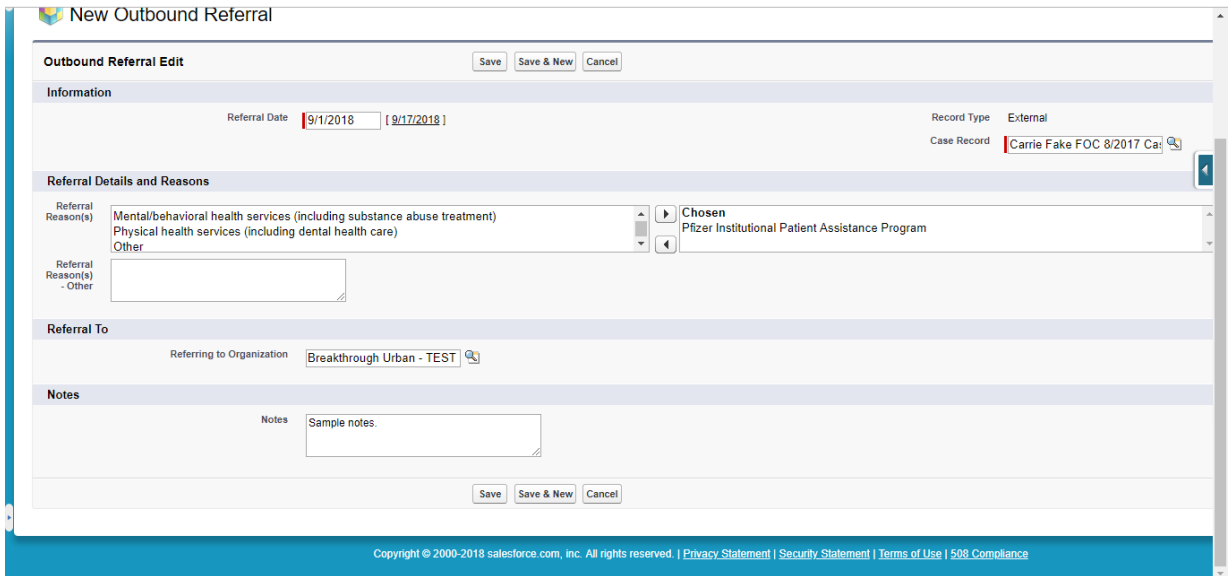
- None--
- General health insurance
- Single medical exam/service (not dental/vision)
- Single dental exam/service
- Single vision exam/service
- Dental insurance
- Vision insurance
- Long-term care insurance
- Medicare Part D
- Medicare Supplemental Health Insurance
- Low Income Subsidy (Medicare Part D)
- Medicare Savings Program
- Patient Assistance Program
- State Prescription Assistance Program
- Non-State Prescription Assistance Program
- Non-State Prescription Discount Program
- Co-Payment Assistance
- Treatment Specific Assistance
- Other

The "Non-State Prescription Assistance Program" option is highlighted with an orange box. An orange arrow points from the text in the instructions above to this dropdown menu.

At the bottom of the form, there is a "Note" section with columns for "Note", "Created By", and "Created Date", and a "View/Edit" button. An "Add Row" button is also visible.

If you are referring your client to a Pfizer Institutional Patient Assistance location, you will need to enter this as an “Outbound Referral”.

- 1) From the client’s case record, hover over “Outbound Referrals” and click on “new Outbound referral”
- 2) From the pick list for “Referral Reason (s)” find and select “Pfizer Institutional Patient Assistance Program” and move to the chosen box.
- 3) Find “Referring To” entity. Note: this may require you to create an entity before creating this outbound referral.



New Outbound Referral

Outbound Referral Edit Save Save & New Cancel

Information

Referral Date: 9/1/2018 [9/17/2018] Record Type: External
Case Record: Carrie Fake FOC 8/2017 Ca

Referral Details and Reasons

Referral Reason(s): Mental/behavioral health services (including substance abuse treatment)
Physical health services (including dental health care)
Other

Chosen: Pfizer Institutional Patient Assistance Program

Referral Reason(s) - Other: [Text Area]

Referral To

Referring to Organization: Breakthrough Urban - TEST

Notes

Notes: Sample notes.

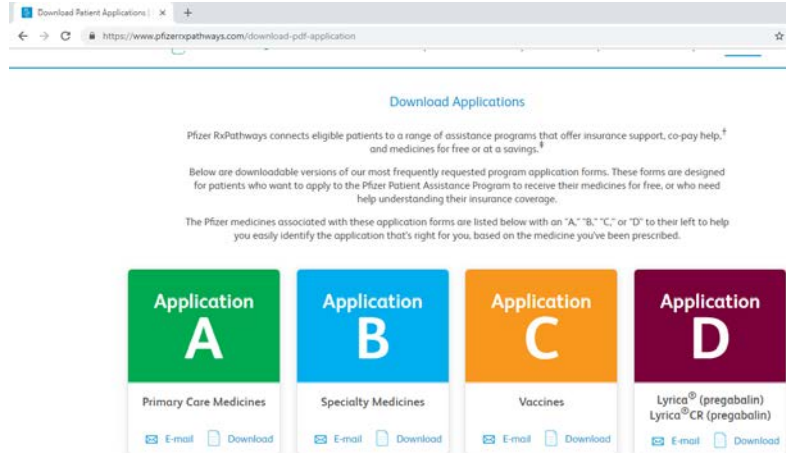
Save Save & New Cancel

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Additional Resources:

<https://www.pfizerxpathways.com/learn-about-programs>

All applications can be printed directly from the website. At the top of the main page click on “Download Materials” to see applications A-D. The links to these application are also found below.



[Application A](#)

[Application B](#)

[Application C](#)

[Application D](#)

Free marketing materials are also available for order on the Pfizer website. If you would like to order marketing materials click on “Explore more Resources” at the top of the website and scroll down to “Order materials”. There are 2 brochures that are available in both English and Spanish.

