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CPhT
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Dr. Mobley Buckstein and Ashleigh Arndorfer report no actual or potential conflicts of interest in relation to this continuing pharmacy education activity.

As the role of the pharmacist changes, so does the role of the pharmacy technician. Technicians need to be prepared to accept responsibilities that aid the pharmacist in providing patient care services efficiently and effectively. This CPE activity identifies duties within clinical services that pharmacy technicians can participate in, and therefore improve the care provided by the pharmacy practice.

Upon completion of this activity, Pharmacy Technicians will be able to:
1. List clinical patient care services technicians can provide in the pharmacy
2. Identify clinical patient care service duties that fit into the scope of practice for certified pharmacy technicians
3. Create workflow models that allow pharmacy technicians to participate in clinical patient care services
4. Develop training materials including annual competencies for certified pharmacy technicians to utilize in the pharmacy
5. Discuss quality assurance programs that certified pharmacy technicians can participate in to increase the awareness of clinical patient care services available in pharmacies

CPE Information:
UAN #: 0107-0000-15-004-H04-T
CEUs/Hours: 1 contact hour (0.1 CEU)
Target Audience: Pharmacy Technicians
Activity Type: Application-based
Initial Release Date: 1/1/2015
Planned Expiration Date: 1/1/2018

The Collaborative Education Institute is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education.

This activity has been developed specifically for pharmacy technicians and is one of 10 activities in the TEAM series.

The Role of Pharmacy Technician in Patient Care Services

Advancing the role of pharmacy technicians is recognized as an imperative in order for pharmacists to practice “at the top of their license.”1 The National Association of Boards of Pharmacy recommends that all pharmacy technicians be nationally certified by 2015.2 This certification in addition to increased educational opportunities and training will allow pharmacy technicians to practice “at the top of their license.” As the role of the pharmacist changes so does the role of the pharmacy technician. In order to allow the pharmacist to provide direct patient care services, the pharmacy technician will move into various roles including distribution through tech-check-tech programs, facilitate clinical services and aid in continuous quality improvement. Throughout this article, we will address clinical services in which the pharmacy technician may participate, provide ideas for workflow models, aid in development of competency-based evaluations and discuss continuous quality improvement strategies.

IDENTIFYING PATIENT CARE SERVICES

“The counting and pouring now often alleged to be the pharmacist’s chief occupation will in time be done by technicians and eventually by automation.”3 Linwood F. Tice, D.Sc., Dean, Philadelphia College of Pharmacy and Science (1966) The shift in the primary job of the pharmacist as described in the 1960’s now applies to the pharmacy technician. Clinical research shows that pharmacy technicians are being utilized in health systems in many ways (Table 1). They perform medication reconciliation, tech-check-tech distribution functions, inventory control and much more. In community pharmacies, pharmacy technicians are in a unique position to inform patients of clinical services that can be provided by the pharmacist. Patient care services that are provided in community pharmacies include: point-of-care testing/screening (cholesterol, hemoglobin A1C, blood glucose, bone density), immunizations, customized fit shoes for people with chronic health conditions, medication therapy management, chronic disease management education programs, compliance packaging, simple drug compounding and medication flavoring (Table 2).

Critical Thinking Question #1
1. What types of patient care services does your pharmacy provide?
2. How could you participate in the function of these services?

When working with patients, the pharmacy technician assists in scheduling appointments, aiding the patient in completing the appropriate paperwork,
collecting medication lists, health and social histories, providing follow up with patients based on pharmacist recommendations and administering satisfaction surveys. In some states, the technicians are allowed to provide simple patient assessment such as weight, height and blood pressure measurement. The technician can further help the pharmacist by monitoring potential opportunities for medication therapy management encounters, organizing paperwork, creating and maintaining patient files, documenting any physical assessment that the technician has performed, documenting patient encounters based on pharmacist notes, billing for services provided and managing data for continuous quality improvement.

In 2011, fifteen states had legislation regarding the use of tech-check-tech in their inpatient facilities. Pharmacy technicians will be asked to step into higher-level distribution activities as pharmacies continue to develop and offer patient care services. Currently, there are pilot projects being performed in many states to expand tech-check-tech to the community pharmacy setting. Originally, tech-check-tech programs were designed to move the pharmacist out of distribution roles and move them into clinical patient care services. Currently, pharmacy technicians are being utilized in health systems to perform medication reconciliation, a form of a direct patient care service. Tech-check-tech programs utilize additional education on the job and competency-based evaluations for ongoing assessment of performance. The primary responsibility of the pharmacy technician in a tech-check-tech program is to perform the final check on prescriptions. There are specific guidelines that must be followed and specific prescriptions that qualify to be part of a tech-check-tech program. Disclaimer: Know your state regulations on the duties that a pharmacy technician can and cannot perform.

Critical Thinking Question #2
- Look up your state regulations, what patient care services can a pharmacy technician perform?
- What duties are specifically listed that a pharmacy technician can NOT perform?

WORKFLOW MODELS

Workflow Scenario
At ABC Pharmacy, the old workflow model has included taking in prescriptions, processing them through the pharmacy information system, filling the prescription and assisting the patient at the cash register while providing counseling. Recently, the pharmacy was purchased and under new ownership, a new workflow model has been introduced to include patient care services. In this new model, each technician has been delegated specific duties related to new clinical services that will be offered in the pharmacy. Tech one is responsible for Medicare billing of diabetes testing supplies, Tech two is responsible for immunization consent forms, VIS, and immunization registry documentation, and Tech three is responsible for managing medication therapy management encounters, documentation and billing. Technicians are scheduled for training. Experts hired by the new ownership will provide training. Once training has been completed, a super trainer from the company will be working in the pharmacy alongside the technicians for a couple of weeks while implementing the new workflow model. Upon completion of implementation, continuous quality improvement will be performed to ensure the new model is successful.

It is important to design new pharmacy practice models to maximize efficiency in workflow. Three key objectives of designing workflow models are: 1. Defined job responsibilities, 2. Trained supervisors or leaders within the organization who support the new model, 3. Incorporating the model into every day work. It is important that the employer or organization that you work for has defined responsibilities for each technician. Each responsibility should have defined competencies and should be included in the quarterly, bi-annual or annual performance evaluation. When implementing a new workflow model, it is important to have pharmacists and lead/supervising pharmacy technicians trained. This will allow for leadership during the implementation and transition from an old model to the new model. One idea would be to have experts in the field of each service train the technicians on the duties that they will be responsible for completing. Another idea is to have a super trainer, someone who is fully trained and using the new model in their practice to train alongside the technicians during implementation of the new model. This person is equipped to champion the new model and explain pitfalls when the model is not implemented properly. Upon completing training, it is crucial to implement the new model as soon as possible. Waiting to implement the model will allow for pitfalls or old habits to resurface and may set the pharmacy up for failure. Efficient practices from previous workflow can be incorporated into the new model. This approach can streamline the process and create buy in to the new model with employees. Continuous quality improvement can also help measure the sustainability of the model. Ideas for measurements include: patient satisfaction, employee satisfaction and efficiencies in daily activities.

Critical Thinking Question #3
- Based on the three objectives of workflow model design, how would you design a new workflow model in your pharmacy that would incorporate a new patient care service?
- Are you able to add steps to your current workflow? Would you need to design a completely new workflow to make things work more efficiently?

DEVELOPING COMPETENCIES

There is a framework that must be followed when developing competencies. Competencies must directly link organizational objectives and personal performance. Defined competencies are necessary for success within the organization. They can ensure that employees demonstrate sufficient expertise, recruit and select staff more effectively,
evaluate knowledge gaps in skills more efficiently, provide more customized training and professional development, plan for success and make changes in processes work more efficiently. Competencies are the measurable or observable knowledge, skills, abilities and behaviors critical to successful job performance. When developing competencies, the defined job responsibilities must be looked at and separated out into measurable and non-measurable skills. An organization may also want to look at their own business objectives, strategies and principles to guide the development of the competencies. Another driving force for developing competencies is the consumer - what does the consumer need and what do they expect? Organizing all of these pieces of information will assist in creating competencies that will be comprehensive to the job and may cross over to other employees. Once the measurable skills have been identified, objective means for evaluation need to be created. The use of verbs or action words should be included when developing the competency. A scale should be created to measure the competencies. See example below.

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Competency not met</td>
</tr>
<tr>
<td>1</td>
<td>Major Development needed</td>
</tr>
<tr>
<td>2</td>
<td>Minor Development needed</td>
</tr>
<tr>
<td>3</td>
<td>Competency met</td>
</tr>
</tbody>
</table>

### Example of Competency Development Based on Job Description or Responsibilities:

**Job Responsibilities for the Medication Therapy Management (MTM) Pharmacy Technician**

- Must have good communication skills both written and verbal
- Be organized and manage time well
- Complete the online tutorial for the MTM vendor that our pharmacy utilizes for documentation and billing
- Identify patients eligible for a MTM encounter
- Alert the pharmacist to billable services
- Distribute and monitor communications to providers
- Document claims
- Offer and schedule comprehensive medication reviews (CMRs)
- Collect and document medication lists, note new medications and potential issues with CMS 5 Star measures
- Update the medication list and the medication action plan upon completion of the CMR
- Generate and deliver the patient takeaway to the patient
- Schedule follow ups with patients regarding interventions
- Remind the pharmacist about follow ups with patients and providers.
- Developing Competencies based on the job responsibilities
- Effective written and verbal communication skills as demonstrated by number of interventions documented (distribution of communications to providers)
- Efficient organization and time management as demonstrated by the number of appointments scheduled in this evaluation period as compared to previous evaluation period
- Completion of the online tutorial
- Appropriately identifies patients eligible for a MTM encounter
  - Eligible for CMR demonstrated by number of CMRs scheduled by the technician
  - Eligible for 5 Star Measures interventions demonstrated by number of interventions identified by technician
- Providing documentation to the pharmacist prior to MTM encounter (med lists, new notes, etc)
- Updates the medication list and action plan timely
- Generates and delivers the patient takeaway within 2 weeks of the CMR
- Schedules follow ups with patients
- Organizes pharmacist follow ups with patients and providers

### Continuous Quality Improvement

**Thinking about the Job Responsibilities and Competencies in the Example Above.**

1. What competencies would you want to study? (Think about areas that could be improved by process or procedure changes.)
2. What kind of metrics would you want to collect? (Metrics are types of data...numbers, percentages, etc.)

“In health care, continuous quality improvement (CQI) is defined as a structured organizational process for involving personnel in planning and executing a continuous flow of improvements to provide quality health care that meets or exceeds expectations.” In other words, employers or managers identify problem areas in our processes, new models (e.g. workflow) are carefully and thoughtfully implemented and measurable data is collected to compare the new model to the old one. When developing CQI, Varkey, Peller and Resar state that “efforts to improve quality need to be measured to demonstrate whether improvement efforts 1) lead to change in the primary end point in the desired direction, 2) contribute to unintended results in different parts of the system, and 3) require additional efforts to bring a process back into acceptable ranges.” Effective CQI looks at problem areas, creates means to improve those areas and is able to show through measurable data that a desired increase in quality has occurred, has had a positive impact on the organization or has allowed the organization the effort to get a service back on track that previously scored low. It is imperative that the technician who has been delegated patient care services assists in developing plans for CQI. This puts accountability for the service into the technician’s hands. It allows the technician the opportunity to see where improvement is
needed to produce a high quality service. It also allows the technician the opportunity to celebrate areas of the service that are already high quality. CQI can be performed in many areas of the patient care service. The technician is integral in CQI data management for the clinical service (patient data), the employees responsible for the service (employee competency data) and patient satisfaction data.

**CONCLUSION**

In a 2008 publication, Jan Keresztes, a pharmacy technician program coordinator, stated “Pharmacy technicians are the backbone of the pharmacy profession. Too many times, there is not enough value placed on technicians’ work.” The role of the pharmacist has changed over time and now with provider status legislation in Congress, it is even more imperative that pharmacy technicians will be positioned to move into new roles within the pharmacy. This will include supervisory roles, distribution duties through tech-check-tech and increased responsibilities in patient care services. These new tasks will require education and on-the-job training. As pharmacy rules and regulations evolve, the need for and value of pharmacy technicians will increase. The value placed on technicians will elevate the profession and the need for additional competency requirements. Through these new responsibilities, technicians will discover the need for continuous quality improvement. This will become an integral piece of every day activities. The time to practice at the top of your license is here, will you take on the challenge?

**Table 1. Pharmacy Technician Work Environments**

<table>
<thead>
<tr>
<th>Pharmacy Technician Work Environment</th>
<th>Long-term care technician*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication–inventory control specialist</td>
<td>Home care technician</td>
</tr>
<tr>
<td>Intravenous admixture specialist</td>
<td>Medicare Part D specialist</td>
</tr>
<tr>
<td>Third-party billing specialist</td>
<td>Managed care technician</td>
</tr>
<tr>
<td>Pharmacy benefits manager</td>
<td>Quality assurance/staff development</td>
</tr>
<tr>
<td>Clinical pharmacy technician</td>
<td>Automation technician</td>
</tr>
<tr>
<td>Nuclear pharmacy technician</td>
<td>Mail-order technician</td>
</tr>
<tr>
<td>Education and training coordinator</td>
<td>Compounding technician</td>
</tr>
<tr>
<td>Pharmacy software specialist</td>
<td>Medication assistance programs (for patients not fluent in English)</td>
</tr>
<tr>
<td>Investigational drug technician</td>
<td>Specialty areas (wellness, antihyperlipidemia, antithrombosis clinics, immunizations</td>
</tr>
<tr>
<td>Supervisor with tech-check-tech responsibilities</td>
<td>Pharmacy department manager (scheduling, limited policy/ procedure responsibilities, problem resolutions, patient care triage)</td>
</tr>
</tbody>
</table>

*In some states, because of the severe shortage of nurses, pharmacy technicians are involved with oral administration of medication to nursing home patients. Fulfilling this responsibility only requires that pharmacy technicians take additional weeks, not months or years, of training.
### Table 2. Examples of Pharmacy Technician Activities for Patient Care Services

<table>
<thead>
<tr>
<th>Patient Care Services</th>
<th>Pharmacy Technician’s Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immunizations</td>
<td>Informed Consent, Vaccine Information Statement (VIS), run through as a prescription following pharmacy’s protocol, alert pharmacist of patient, cash the patient out at the register</td>
</tr>
<tr>
<td>Medication Therapy Management (MTM)</td>
<td>identify patient’s eligible for MTM services, offer and schedule MTM services, obtain medication lists from patient, alert pharmacist to billable services, distribute and monitor communications to/from provider, document claims, note new medications or potential non-adherence with CMS 5 Star Measures, generate and deliver the patient takeaway materials, schedule follow ups for the pharmacist, update medication lists and medication related action plan.</td>
</tr>
<tr>
<td>Blood Cholesterol Point of Care screening</td>
<td>offer and schedule the service, set up the machine and materials for the pharmacist, maintain inventory of supplies needed for screening, create patient file or maintain patient file for documentation, maintain educational materials for pharmacist to utilize during appointment.</td>
</tr>
<tr>
<td>Blood Glucose Point of Care screening</td>
<td>offer and schedule the service, set up the machine and materials for the pharmacist, maintain inventory of supplies needed for the screening, create patient file or maintain patient file for documentation, maintain educational materials for pharmacist to utilize during appointment.</td>
</tr>
<tr>
<td>Blood Pressure Measurement</td>
<td>offer and schedule the service, set up materials, if trained and appropriate through your state’s regulations- measure blood pressure and pulse, document reading for patient and in patient’s file, maintain educational materials to utilize during the appointment, maintain supplies and provide monthly QI on stethoscope and blood pressure cuff maintenance</td>
</tr>
<tr>
<td>Bone Density Point of Care screening</td>
<td>offer and schedule the service, set up the machine and materials for the pharmacist, maintain inventory of supplies needed for screening, create patient file or maintain patient file for documentation, maintain educational materials for pharmacist to utilize during appointment.</td>
</tr>
<tr>
<td>Medication Compliance Packaging</td>
<td>offer service, process prescriptions, fill compliance packing material appropriately, document and print contents of package, follow up with patients regarding dose changes or new medications.</td>
</tr>
<tr>
<td>Custom Shoe Fitter</td>
<td>requires additional certification through the company that provides the shoes, offer service, schedule appointment, physical examination of feet and perform custom mold of the feet, perform the fitting once shoes arrive, order the shoes, contact the insurance to verify eligibility, bill the service, follow up with patient satisfaction</td>
</tr>
</tbody>
</table>

### REFERENCES:

1. Role of Pharmacy Technicians in the Development of Clinical Pharmacy; Jan M Keresztes; Ann Pharmacother November 2006 vol. 40 no. 11 2015-2019
POST ASSESSMENT QUESTIONS:

1. Which of the following is/are an example of a place where pharmacy technicians could be utilized?
   a. Medication therapy management technician
   b. Immunization technician
   c. Education and training coordinator
   d. All of the above

2. In health systems, what clinical responsibilities do pharmacy technicians have?
   a. Medication reconciliation
   b. Tech-check-tech
   c. Patient physical assessment
   d. Both A and B

3. If you were a pharmacy technician who worked in a pharmacy that just began offering blood pressure measurements. What duty would you NOT be able to perform?
   a. Educating the patient about services offered
   b. Scheduling the patient care service
   c. Making recommendation based on the assessment
   d. Documenting the blood pressure measurement

4. True or False: Current workflow models can be utilized when incorporating patient care services into daily work.
   a. True
   b. False

5. When designing new pharmacy practice models, what is the ultimate goal?
   a. Set apart from every day workflow
   b. Maximize workflow efficiency
   c. Define job responsibilities
   d. Provide training

6. What is a super trainer?
   a. Leader in the area of expertise
   b. Implementation expert
   c. Works alongside the employees
   d. All of the above

7. What are tools that are used to evaluate performance?
   a. Performance evaluations
   b. Competency based evaluations
   c. Training checklists
   d. Satisfaction surveys

8. Competencies must directly link organizational objectives to ________.
   a. Job responsibilities
   b. Patient outcomes
   c. Personal performance
   d. Profit margins

9. How are competencies measured?
   a. Use of verbs and action words
   b. Personal opinion of manager
   c. Non measurable skills
   d. Defined measurement scale

10. What does continuous quality improvement achieve?
    a. Finds areas for improvement
    b. Celebrates high quality
    c. Leads to changes to ensure quality
    d. All of the above

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3. Click on the box to select the TEAM Series 2015 and click Register
4. On the Payment Transaction Page, scroll down to “Pay With An Access Code” and type in the access code given to you by your association and click Continue
5. You can now start the TEAM Series right away by clicking “Click Here to Go to Activity”. Scroll down to activity and all 10 TEAM articles are within your profile!
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Any questions, please contact Cindy Smith at csmit@gotocei.org or 515-270-8118.