The Role of the Clinical Pharmacy Technician

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CPE Information

- Target Audience: Pharmacists & Technicians
- ACPE#: 0202-0000-16-181-L04-P/T
- Activity Type: Knowledge-based

Learning Objectives

1. State the role of a clinical pharmacy technician
2. Identify efficiency contributions that clinical technicians make to a clinical pharmacy team
3. Describe the Army model for implementing clinical pharmacy technicians

Self-Assessment Questions

1. Some of the duties of the clinical pharmacy technician include:
   a. Creating and managing clinical pharmacist schedules
   b. Screening patients and booking/adjusting appointments
   c. Patient education
   d. Both A and B
   e. All of the above

2. The impact of clinical pharmacy technicians can result in:
   a. Reduced administrative duties
   b. Improved patient satisfaction
   c. Improve quality metrics for clinical pharmacy
   d. All of the above

3. Clinical pharmacy technicians can improve pharmacist encounters by:
   a. Increasing pharmacist availability for direct patient care
   b. Reinforce value in clinical pharm education and direction
   c. Performing medication reconciliation prior to seeing the pharmacist
   d. All of the above

CPE Information and Disclosures

Drs. Suzanne Phillips and Jennifer Evans declare no conflicts of interest, real or apparent, and no financial interests in any company, product, or service mentioned in this program, including grants, employment, gifts, stock holdings, and honoraria.
ADVANCING THE ROLE OF THE PHARMACY TECHNICIAN IS IMPARATIVE IN ORDER FOR PHARMACISTS TO PRACTICE “AT THE TOP OF THEIR LICENSE”


The consensus of the Pharmacy Practice Model Summit.


ARE YOU UTILIZING PHARMACY TECHNICIANS IN ADVANCED ROLES? HOW?


The consensus of the Pharmacy Practice Model Summit.


Advanced Technician Roles

TRADITIONAL DISPENSING ROLES:
- Intravenous pharmacy technician
- Investigational drug pharmacy technician
- Nuclear pharmacy technician
- Medication inventory pharmacy technician
- Narcotic control pharmacy technician
- Compounding pharmacy technician
- Oncology pharmacy technician

NON-TRADITIONAL ROLES:
- Informatics pharmacy technician
- Automation pharmacy technician
- Education and training coordinator
- Clinical pharmacy technician


OVERVIEW: Clinical Pharmacy Technician

Opportunity where technicians can
- Practice in an advance setting
- Build on patient communication and education skills required for traditional pharmacy dispensing
- Assist with administrative and patient care support tasks
- Provide patient education as clinical pharmacist extender


Overview: Clinical Pharmacy Technician Continued

The role of clinical pharmacists continues to develop in the Patient-Centered Medical Home (PCMH)
- Administrative and patient care support is needed to meet demands and efficiency.
- The clinical pharmacy technician can
  - Help to balance the pharmacist workload
  - Allow more direct patient care time from pharmacists.


Basis for Expanded Role

- Pharmacy technicians can help identify
  - Drug-related problems
  - Patients who might benefit from a comprehensive medication review
- Pharmacy technicians can escalate these situations to the appropriate level of care


Am J Health Syst Pharm. 2014;71(18):1567-74


Examples of Technician Impact

**Tech-Check-Tech:** Shifting pharmacist prescription verification and dispensing role to technician

- 4 Published Models:
  - Reported pharmacist time saved ranged from 10-30 hours per pharmacist per month

**Technician Medication Reconciliation:** Shifting medication reconciliation to technician

- 3 Published Models:
  - Emergency Department: Technicians identified 1748 medication discrepancies in 3 month period, consistent with pharmacist identified medication reconciliation discrepancies in another published study
  - Hospital HIV Service: Technicians identified 49 medication errors in 27 of 55 patients (49%), of which 41% were then intervened by pharmacist
  - Preoperative Setting: Technicians reduced proportion of patients with medication discrepancies (statistically significant; RR 0.29; 95% CI 0.12 to 0.71)

**Examples of Technician Impact**

- Hospital-associated Anticoagulation Service
  - Clinical pharmacy technician to
    - Manage administrative duties
    - Assist with patient care (e.g., taking vitals and blood samples)
    - Increases in clinic organization and accommodation of clinical pharmacy consults
    - Reduction in pharmacy overtime hours

- Transition of Care Model
  - Collaboration with State of Tennessee to expand role of clinical pharmacy technician
    - Clinical pharmacy technicians
      - Reinforce medication education
      - Promote patient self-management of medications

**Impact of Clinical Pharmacy Technician**

- Increase clinical pharmacist efficiency:
  - Reducing administrative duties
  - Increase direct patient care duties
  - Improve appropriateness of encounters

- Improve quality metrics for clinical pharmacy
  - Data gathering, screening and reporting

- Improve patient satisfaction
  - Decrease wait times for appointments
  - Assist with scheduling of appointments
  - Assist with patient communication

**ESTABLISHING A POSITION**
Federal Clinical Pharmacy

- Clinical pharmacists are credentialed independent providers, privileged to write prescriptions
- U.S. Army regulation authorizes delegation of selected routine patient care tasks:
  - From privileged to non-privileged providers
  - Predictable results, low potential risk
  - Does not involve complex or multidimensional application
  - Clinical pharmacist remains supervising authority

First things, First!

- Position Funding
- Work Area Location
  - Quiet, low traffic area
  - Phone, voicemail
  - Desk, printer, scanner, dual computer screens
  - Computer Access
- Updated Position Description
- Good Fit Candidate

Clinical Pharmacy Technician Skillset

Basic Pharmacy Knowledge
- Drug name, strength, formulation
- Formulary
- Filling prescriptions, dispensing
- Review prescriptions for the full range of pharmaceuticals to include controlled substances

Advanced pharmaceutical drug knowledge
- CPhT preferred
- Drug classes
- Drug interactions (drug information database)
- Drug storage, disposal
- Clinic specific disease state knowledge
- Aware of pertinent policies, regulations

Computer Skills
- Working knowledge of Microsoft Office® (Excel, PowerPoint, Word, Access)
- Ability to generate and manage data reports
- Healthcare system – pharmacy system, booking appointments, patient status/demographics/eligibility
- Electronic health record – documentation of patient encounters, managing and creating TCONs

Communication Skills
- Ability to interact with all levels of medical staff
- Strong patient communication skills
- Sales!
- Independent, self-motivated
- New venture to define and maintain
- Maintain pace for various deadlines
- Prioritize risk and urgency
Pharmacy Technician Certification Board

Eligibility requirements:
- High school diploma or equivalent educational diploma
- Full disclosure of all criminal and State Board of Pharmacy registration or licensure actions
- Compliance with all applicable PTCB Certification policies
- Passing score on the Pharmacy Technician Certification Exam (PTCE)

Must maintain:
- 20 hours of pharmacy technician-specific continuing education
- 1 hour of medication safety continuing education every 2 years

Position Description – Ft Meade

Pharmacy Technician (GS-0661-06)

Supervisory Controls
- Pharmacy NCOIC
- Pharmacist

Major Duties
- Dispensing
- Drug knowledge [name, dosage forms, formulary]

Focus of Duties
- 100% Dispensing

Clinical Pharmacy Technician (GS-0661-06)

Supervisory Controls
- Chief, Pharmacy Services
- Pharmacy NCOIC
- Direction from Clinical Pharmacist

Major Duties
- Administrative
- Drug Utilization Evaluation
- Patient Care
- Patient Education
- Dispensing
- Drug knowledge [name, dosage forms, formulary]

Focus of Duties
- 25% Dispensing
- 75% Clinical

Position Description – Ft Carson

Pharmacy Technician (GS-0661-06)

Supervisory Controls
- Pharmacy NCOIC
- Pharmacist

Major Duties
- Dispensing
- Drug knowledge [name, dosage forms, formulary]

Focus of Duties
- 100% Dispensing

Clinical Pharmacy Technician (GS-0661-06)

Supervisory Controls
- Clinical Service OIC of Dept. of Pharmacy
- Clinical Pharmacists

Major Duties
- Administrative
- Drug Utilization Evaluation
- Patient Care
- Patient Education
- Dispensing
- Drug knowledge [name, dosage forms, formulary]

Focus of Duties
- ≤5% Dispensing
- ≥95% Clinical

Clinical Pharmacy Technician Duties

Patient Care
- Contact patients via telephone to provide education about proper medication administration, storage and disposal
  - Chart review of prescription dispensing history and documentation in medical record
- Communicate with other health care providers
  - Coordinate clinical pharmacy care
  - Notify of completed consults
- Assist with drug information inquiries
  - Formulary, local availability
  - Available dosage forms
- Prepare educational materials
  - Print copies, collate new patient materials
  - Distribute provider references

Education
- Preparation of educational materials for patients and healthcare providers
- Use of computer software (word processing programs)

Data Management
- Assist with data collection (DUE, research, metrics)
- Maintain proficiency in software programs required to manage data
- Maintain knowledge of medical and drug terminology

Clinical Pharmacy Technician Duties Continued

Education Continued

Data Management Continued
Clinical Pharmacy Technician Duties Continued

Administrative
- Manage clinical pharmacist appointment schedule
  - Monthly appointment template, scheduling, managing cancellations
- Manage clinical pharmacy consults
  - Reviewing referral, determining priority, scheduling appointment
- Gather metric data, generate reports
- Communicate clinical pharmacy announcements (email, social media)
- Coordinate clinical pharmacist peer review process

Clinical Pharmacy Technician Training Continued

- Orientation to clinical pharmacy services
- Creation of clinical pharmacy schedules
- Appropriate consult review and appointment scheduling
- Method for prioritizing patient care
- Triage or transfer of care to clinical pharmacist or provider
- Basic familiarity with disease states managed by the clinical pharmacists
- Review of high-risk medications
- Appropriate patient communication skills
- Electronic health record documentation
- Data collection and reporting

Clinical Pharmacy Technician Competency Assessment

- Patient Interaction
- Communication and education
- Use of pharmacy information
- Quality assurance
- Medication-related knowledge
- Automation and informatics

DEPARTMENT OF ARMY PHARMACY

Department of Army Pharmacy

- Expansion of clinical pharmacy services, 2012-2016:
  - Medical home clinical pharmacist, 75 to 156 (funding allocated for additional 44 positions)
  - 39 Clinical pharmacy technicians by FY2016

Department of Army Pharmacy

- Army Medical Home Staff Roles and Responsibilities Manuel – anticipated publication September 2016
  - Fact sheet
  - Competency assessment
- Standardized Position Description
  - Work in-progress
Clinical Pharmacy Technician
Fact Sheet

Competency Assessment

CLINICAL PHARMACY TECHNICIAN REINFORCING
POLYPHARMACY PATIENT EDUCATION

Clinical Pharmacy Technician Polypharmacy Objectives (Telephone)

<table>
<thead>
<tr>
<th>Encounter Objective</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drug Allergy</td>
<td>Confirm use of high risk medications</td>
</tr>
<tr>
<td>Social History</td>
<td>Occupation (e.g., fire arms, heavy machinery)</td>
</tr>
<tr>
<td>Medication Reconciliation</td>
<td>Ensure accurately documented</td>
</tr>
<tr>
<td>Risk Assessment</td>
<td>History of substance abuse, Medication Storage and Disposal (e.g., change in therapy)</td>
</tr>
<tr>
<td>Medication Education</td>
<td>Appropriate use, indications and dosing schedule; Duration of use for controlled substances</td>
</tr>
<tr>
<td>Documentation</td>
<td>Identify and prioritize medication-related problems</td>
</tr>
</tbody>
</table>

RISK ASSESSMENT BY TECHNICIAN

- Knowledge of high risk medications (e.g., controlled substances, antipsychotics, sleep aids, CNS depressants)
  - Drugs requiring restricting dosing or quantity limits
  - Review pharmacy profile for dispensing patterns (e.g., multiple providers, multiple pharmacies, early fill)
- Knowledge of or inquire history of substance abuse, behavioral health medical conditions for patient or family
  - Review problem list, recent appointment encounters or ask patient
- Inquire about storage and administration of medications
  - Where maintaining supply, who has access to supply
  - What triggers patient to take medication, dosing schedule
- Inquire about excess supply upon completion or change in therapy, and appropriate disposal
  - Dose count, calculate days supply
  - Knowledge of appropriate disposal of medications:
    - How to Dispose of Unused Medicines
    - Disposal of Unused Medicines: What You Should Know
MEDICATION EDUCATION BY TECHNICIAN

- Review indication, administration and dosing schedule, days supply or duration of therapy
  - Dosing strategies (e.g., pillbox, alarm, dosing calendar)
- Proper storage, disposal
- Random drug testing regulations
  - Army: 6-months from last dispense date
- Interactions
  - Alcohol and CNS Depressants, Antipsychotics, Antidepressants

IDENTIFY CLINICAL PHARMACIST REFERRAL

- Detailed questions about how medication works
- Drug-drug, drug-disease state interactions
- Possible adverse reaction or side effects from medication
- Medication ineffective
- Medication initiation, discontinuation or dose adjustments
- Inquiries about other disease states
- Request for medication refill (beyond processing an existing refill) or renewal
- Request for labs, referrals
- Command related policies or documentation
- Enrollment with Sole Provider program

EXAMPLE OF IMPLEMENTING A CLINICAL PHARMACY TECHNICIAN

Kimbrough Ambulatory Care Center, Fort Meade, MD
Jennifer L. Evans, PharmD, BCACP, C-TTS

Clinical Pharmacy Services
Kimbrough Ambulatory Care Center, Fort Meade, MD

- 3 Medical Home Clinical Pharmacists
- 3 Part-time positions (Pain Management, Formulary management, Clinical Coordinator)
- 1 Clinical Pharmacy Technician
  - Polypharmacy
  - Tobacco Cessation
  - Anticoagulation Clinic
  - Lipid Clinic
  - Sole Provider

Technician Duties
Kimbrough Ambulatory Care Center, Fort Meade, MD

<table>
<thead>
<tr>
<th>POSITION DESCRIPTION</th>
<th>RECORDED ACTIVITIES*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical Activities (75%)</td>
<td>Clinical Activities (60.0%)</td>
</tr>
<tr>
<td>Non-clinical Activities (25%)</td>
<td>Non-clinical Activities (39.4%)</td>
</tr>
<tr>
<td>Dispensing 25%</td>
<td>Clinic Closure, Leave 19%</td>
</tr>
<tr>
<td>Patient Care and Education 30%</td>
<td>Training, Meetings, Other 8%</td>
</tr>
<tr>
<td>Data Management 15%</td>
<td>Dispensing 12%</td>
</tr>
<tr>
<td>Administrative 30%</td>
<td>Direct Patient Care and Education 31%</td>
</tr>
</tbody>
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KACC Clinical Pharm Technician Impact

**Clinical Pharmacist Utilization and Efficiency**

BEFORE [Nov2013 – Jan2014]

- Meetings/Admin 57%
- Direct Patient Care 43%

AFTER [Feb2014 – Apr2014]

- Meetings/Admin 20%
- Direct Patient Care 80%
Clinical Pharmacy Services
Kimbrough Ambulatory Care Center, Fort Meade, MD

- Increase in clinical pharmacists’ ability to provide patient care
  - Transition of tasks
  - Initial 3 months, clinical pharmacists devoted an additional 10-15 hours per month to clinical activities
  - Average number of clinical pharmacist completed encounters increased from 240-290 per month
  - Addition of 2nd clinical pharmacy technician, offset 104.3 hours per month (8.4 hours direct patient care, 45.1 hours patient care support, 50.8 hours administrative)

- Improved utilization of existing clinical pharmacy services
  - Increase in successful consult by completed patient encounter from 41% to 56%
  - Decreased days to completed encounter from 22.6 days to 10.3 days

- Extending patient care provided by the clinical pharmacy team
  - Initial 3-months, completion of an average of 90 telephone encounters per month (78% of identified high risk polypharmacy patient population)
  - Addition of 2nd technician, completion of 193 telephone encounters per month

KACC Clinical Pharmacy Technician Impact

Polypharmacy Encounters Attempted/Completed

<table>
<thead>
<tr>
<th></th>
<th>Technician</th>
<th>Pharmacist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan - Mar 2014</td>
<td>94</td>
<td>153</td>
</tr>
<tr>
<td>Apr - Jun 2014</td>
<td>157</td>
<td>160</td>
</tr>
<tr>
<td>Jul - Sep 2014</td>
<td>164</td>
<td>170</td>
</tr>
<tr>
<td>Oct - Dec 2014</td>
<td>108</td>
<td></td>
</tr>
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</table>

EXAMPLE OF IMPLEMENTING A CLINICAL PHARMACY TECHNICIAN
Evans Community Hospital, Fort Carson, CO
Suzanne Phillips, PharmD, BCPS, MPH, PhD

- A clinical pharmacy technician supports the pharmacy team workflow and increases clinical pharmacist time for direct patient care.

- Polypharmacy statistics: 9-fold increase in patient contact from the pre-technician period (More details on following slides)

- The technician was able to screen and attempt to contact 100% of the active duty patients referred-reported, in addition to handling other administrative duties.
Testimonial

"In my opinion, our clinical pharmacy technicians help us to present a more professional image. We are able to see more patients, have a more consistent mechanism for follow up, and for patient scheduling. The clinical pharmacy technicians help me to be able to focus more on patient care and less on some of the necessary tasks associated with building a practice very quickly here at Premier."

Michael Andrews, PharmD, BCPs, BCACP
Clinical Pharmacist
Premier Army Medical Home (CBMH)
Colorado Springs, Colorado 80907

Testimonial

"Having a clinical pharmacy technician benefits my practice tremendously as it is a means of providing excellent patient care. The technician is able to prioritize to-dos and disseminate them to the proper pharmacists as appropriate. The technician handles making appointments for patients and brings continuity to the clinic department with one point of contact. The technician screens and handles questions from patients with urgent drug questions or appointment needs and directs them to the appropriate resource. The technician also acts as a so called middle man between outpatient and clinical pharmacy as she can direct an issue that was discovered at either location and coordinate efforts for proper resolution and patient satisfaction. Having a technician frees up my time to focus more on direct patient care."

Dave Lebakken, PharmD
Clinical Pharmacist
DiRaimondo Soldier Centered Medical Home
FT. Carson, Colorado 80913

Should a Pharmacy Technician...

- Assist with administrative and patient care support tasks?
- Provide patient education as clinical pharmacist extender?
- Identify drug-related problems? And escalate these situations to the appropriate level of care?
- Complete medication reconciliation?
- Promote patient self-management of medications?
- Perform vital signs?

Summary

- Many advancing roles for pharmacy technicians, clinical pharmacy is one where technicians can provide and support direct patient care activities
- Clinical pharmacy technicians can increase clinical pharmacist efficiency
- Department of Army clinical pharmacy technicians are making an impact in polypharmacy patient management and education
Answers To Self-Assessment Questions

1. Some of the duties of the clinical pharmacy technician include:
   a. Creating and managing clinical pharmacist schedules
   b. Screening patients and booking/adjusting appointments
   c. Patient education
   d. Both A and B
   e. All of the above

2. The impact of clinical pharmacy technicians can result in:
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Answers To Self-Assessment Questions

3. Clinical pharmacy technicians can improve pharmacist encounters by:
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   c. Performing medication reconciliation prior to seeing the pharmacist
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Closing Remarks

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