The Role of the Pharmacy Technician

Beth E. Nytko, CPhT

Department of Army Clinical Pharmacy
Special thanks to the following:

Jennifer L. Evans, PharmD, BCACP, C-TTS
Suzanne Phillips, PharmD, BCPS, MPH, PhD
CPE Information and Disclosures

Beth Nytko declares 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.

The American Pharmacist Association is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education.
CPE Information

- Target Audience: Pharmacists and Pharmacy Technicians
- ACPE#: 0202-0000-18-223-L04-P/T
- Activity Type: Knowledge-Based
Learning Objectives

1. State the role of a clinical pharmacy technician
2. Describe the Army model for implementing clinical pharmacy technicians
3. Explain the value and practicality of adopting a profession-wide, uniform standard for pharmacy technician education and training
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
ADVANCING THE ROLE OF THE PHARMACY TECHNICIAN IS IMPERATIVE IN ORDER FOR PHARMACISTS TO PRACTICE “AT THE TOP OF THEIR LICENSE”
Traditional Technician Roles

- Intravenous pharmacy technician
- Investigational drug pharmacy technician
- Nuclear pharmacy technician
- Medication inventory pharmacy technician
- Narcotic control pharmacy technician
- Compounding pharmacy technician
Advanced Technician Roles

- Informatics pharmacy technician
- Automation pharmacy technician
- Education and training coordinator
- Clinical pharmacy technician
Impact of Clinical Technicians

- Ability to practice in advanced settings
- Build on skills required for traditional pharmacy dispensing
- Assist with administrative and patient care support tasks
- Provide patient education as clinical pharmacist extenders

Impact of Clinical Technicians

- Help to balance pharmacists workload and allow more time for direct patient care
- Identify drug-related problems
- Identify patients who may benefit from a comprehensive medication review
- Recognize and escalate concerns to the appropriate level of care

*Am J Health Syst Pharm.* 2014;71(18):1567-74
Medication Reconciliation – Published Results

▶ Emergency Department: Technicians identified 1748 medication discrepancies in 3 month period (medication omission in 65.7% of discrepancies). Consistent with pharmacist identified medication reconciliation discrepancies in another published study (medication omission 60% of discrepancies) ¹,²

▶ Hospital HIV Service: Technicians identified 49 medication errors in 27 of 55 patients (49%), of which 41% were then intervened by pharmacist ³

▶ Preoperative Setting: Technicians reduced proportion of patients with medication discrepancies (statistically significant; RR 0.29; 95% CI 0.12 to 0.71) ⁴

Hospital-associated Anticoagulation Service

- 2 clinical pharmacy technicians replaced 1 clinical pharmacist (vacancy)
  - Managed administrative duties
  - Assisted with patient care (e.g., taking vitals and blood samples)
  - Increased clinic organization and accommodation of clinical pharmacy consults
  - Reduced pharmacy overtime hours

*Am J Health Syst Pharm. 2007;67:945-51.*
Impact of Clinical Pharmacy Technician

- Increase clinical pharmacist efficiency
  - Reduce administrative duties, increase direct patient care, improve accuracy 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 and patient communication
ESTABLISHING A CLINICAL PHARMACY TECHNICIAN POSITION
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

Department of Army, Medical Services Clinical Quality Management AR 40-68. 22 May 2009.
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
### Trained Clinical Pharmacy Technician vs. Administrative Clerk

<table>
<thead>
<tr>
<th>Category</th>
<th>Trained Clinical Pharmacy Technician [GS 6/7/8]</th>
<th>Administrative Clerk [GS 5/6]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screening medical history</td>
<td>Pharmacy experience and background knowledge allows for more effective medication history screening and prioritizing patients for appointments.</td>
<td>May not have background knowledge to effectively prioritize patients.</td>
</tr>
<tr>
<td>Following up with pharmacists</td>
<td>Can immediately follow up with pharmacists regarding patient concerns or adjust appointment scheduling as necessary due to integration in the team.</td>
<td>May not be able to effectively respond to patient concerns due to limits of schedule templates and remote location.</td>
</tr>
<tr>
<td>Scheduling appropriately</td>
<td>Can schedule patients directly with a pharmacist that specializes in seeing specific patient groups or appointment types.</td>
<td>May not recognize unique patient needs in order to schedule with the most appropriate pharmacist.</td>
</tr>
<tr>
<td>Time/ Efficiency</td>
<td>Serves as a direct point of contact between patients and clinical pharmacists which reduces response time without interrupting the pharmacist/ patient care.</td>
<td>May not be located near the pharmacists or able to address patient needs in a timely manner due to rotating staff and schedule.</td>
</tr>
</tbody>
</table>
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
Clinical Pharmacy Technician Skillset

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
Clinical Pharmacy Technician Skillset

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
Clinical Pharmacy Technician Skillset

Communication Skills

► Ability to interact with all levels of medical staff

► Strong patient communication skills

► Sales!

► Independent, self-motivated

► Maintain pace for various deadlines

► Prioritize risk and urgency
Requirements:

- High school diploma or equivalent educational diploma (e.g., a GED or foreign 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)
- Recertification every 2 years (20 hours continuing education)
# Position Description – Ft Meade

<table>
<thead>
<tr>
<th>Pharmacy Technician [GS-0661-06]</th>
<th>Clinical Pharmacy Technician [GS-0661-06]</th>
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<tbody>
<tr>
<td><strong>Supervisory Controls</strong></td>
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</tr>
<tr>
<td>- Pharmacy NCOIC</td>
<td>- Chief, Pharmacy Services</td>
</tr>
<tr>
<td>- Pharmacist</td>
<td>- Pharmacy NCOIC</td>
</tr>
<tr>
<td>- Direction from Clinical Pharmacist</td>
<td>- Direction from Clinical Pharmacist</td>
</tr>
<tr>
<td><strong>Major Duties</strong></td>
<td><strong>Major Duties</strong></td>
</tr>
<tr>
<td>- Dispensing</td>
<td>- Administrative</td>
</tr>
<tr>
<td>- Drug knowledge [name, dosage forms, formulary]</td>
<td>- Drug Utilization Evaluation</td>
</tr>
<tr>
<td>- Drug knowledge [name, dosage forms, formulary]</td>
<td>- Patient Care</td>
</tr>
<tr>
<td></td>
<td>- Patient Education</td>
</tr>
<tr>
<td></td>
<td>- Dispensing</td>
</tr>
<tr>
<td><strong>Focus of Duties</strong></td>
<td><strong>Focus of Duties</strong></td>
</tr>
<tr>
<td>- 100% Dispensing</td>
<td>- 25% Dispensing</td>
</tr>
<tr>
<td></td>
<td>- 75% Clinical</td>
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</tbody>
</table>
Clinical Pharmacy Technician Duties

Patient Care

- Contact patients via telephone to provide education on 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
Clinical Pharmacy Technician Duties

Education

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

Data Management

► Assist with data collection (Drug Utilization Evaluation, research, metrics)
► Maintain proficiency in software programs required to manage data
► Maintain knowledge of medical and drug terminology
Clinical Pharmacy Technician Duties

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

- 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
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
Army Medical Home Staff Roles and Responsibilities Manual
- published April 2017
- Fact sheet
- Competency assessment
Standardized Position Description
- Work in-progress
Clinical Pharmacy Technician (CBMH) Fact Sheet

**Weekly Tasks:**
- Participates in educational opportunities.

**Monthly Tasks:**
- Downloads/analyzes all POLY-MART reports.
- Manages clinical pharmacist appointment schedule (monthly appointment template).
- Completes monthly metrics report/counts.
- Consolidates data collection for pharmacist interventions.
- Updates and organizes shared drive folders.
- Updates the clinical pharmacy announcements (e.g., email, social media, newsletter, etc.).
- Coordinates clinical pharmacist peer-review process.
- Organizes Pharmacy & Therapeutics (P&T)/Solo Provider materials/handouts.
- Participates in pharmacy meetings to ensure informed of changes (e.g., P&T, Solo Provider committee, pharmacy working groups, etc.).
- Completes monthly, quarterly and yearly mandatory training requirements.
- Collaborates with team to meet measurable performance metrics/standards.

- Provides timely feedback to team members and the pharmacy department on status of progress and goals.
- Projects, scheduled absences (sick and annual leave) to team.
- Ensures currency of all licensure standards (Pharmacy Technician Certification [CPhT]) to include Basic Life Support (BLS).
Clinical Pharmacy Technician Training & Competency

Orientation
- Pharmacy
- Clinical Pharmacy Services

Training
- Clinical Pharmacist
- Clinical Pharmacy Technician

Competency Assessment
- Clinical Pharmacy Coordinator
Clinical Pharmacy Technician Training

- 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
CLINICAL PHARMACY TECHNICIAN REINFORCING POLYPHARMACY PATIENT EDUCATION
## Clinical Pharmacy Technician Polypharmacy Objectives (Telephone)

<table>
<thead>
<tr>
<th>Encounter Objective</th>
<th>Details</th>
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<tbody>
<tr>
<td><strong>Medication Reconciliation</strong></td>
<td>• Confirmation of use of high risk medication(s)</td>
</tr>
<tr>
<td><strong>Drug Allergy</strong></td>
<td>• Ensure accurately documented</td>
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<tr>
<td><strong>Social History</strong></td>
<td>• Occupation (e.g., fire arms, heavy machinery)</td>
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<td></td>
<td>• Inquire about alcohol, caffeine, tobacco use</td>
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<tr>
<td></td>
<td>• Inquire about recreational drug use (legal / illegal)</td>
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<tr>
<td><strong>Risk Assessment</strong></td>
<td>• History of substance abuse</td>
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<td></td>
<td>• Medication adherence, Medication Storage and Disposal (e.g., change in therapy)</td>
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<td>• Multiple providers, pharmacies for controlled substances</td>
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<td>• Memory, cognition</td>
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<td>• Quantity Limits</td>
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<td></td>
<td>• Sole Provider Enrollment, DHA POD Rx Restriction Program</td>
</tr>
<tr>
<td><strong>Medication Education</strong></td>
<td>• Appropriate use, indications and dosing schedule; Duration of use for controlled substances</td>
</tr>
<tr>
<td></td>
<td>• Proper storage, disposal of medications</td>
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<tr>
<td></td>
<td>• Potential side effects, precautions, warnings (per protocol)</td>
</tr>
<tr>
<td></td>
<td>• FDA MedGuide, if applicable</td>
</tr>
<tr>
<td><strong>Documentation</strong></td>
<td>• Identify and prioritize medication-related problems</td>
</tr>
<tr>
<td></td>
<td>• Communication with clinical pharmacist or appropriate provider</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
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
## Patient Scenario

Jane Smith, 40, identified as polypharmacy patient.

<table>
<thead>
<tr>
<th>Medication List:</th>
<th>Past Medical History:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alprazolam 0.5mg</td>
<td>Depression</td>
</tr>
<tr>
<td>Cymbalta 90mg</td>
<td>Anxiety</td>
</tr>
<tr>
<td>Adderall XR 30mg</td>
<td>Asthma</td>
</tr>
<tr>
<td>Vistaril 25mg</td>
<td>Shingles</td>
</tr>
<tr>
<td>Tramadol 50mg</td>
<td>Migraines</td>
</tr>
<tr>
<td>Albuterol Inhaler</td>
<td></td>
</tr>
<tr>
<td>Valtrex</td>
<td></td>
</tr>
</tbody>
</table>
“My doctor already knows my medications, why should I see the pharmacist?”

- She isn’t active duty so she isn’t required to come in and she’s not very open to the idea.

How do you respond?
“I understand your concern. This appointment allows you to have an allotted time with a clinical pharmacist to discuss your medications, and provide you with the opportunity to ask any questions you may have. The pharmacist will check for any adverse reactions or drug interactions. They will also evaluate your dosages and may be able to decrease or increase the dosage of your medication. This appointment is beneficial to your health. I see you have an appointment next week with your doctor. To make it easier on you I can try and schedule an appointment that same day.”
EXAMPLE OF IMPLEMENTING A CLINICAL PHARMACY TECHNICIAN
Clinical Pharmacy Services
Kimbrough Ambulatory Care Center, Fort Meade, MD

- 4 Full Time Clinical Pharmacists
  - 1 pharmacist committed to Joint Commission/Formulary Management duties (part time)
  - 1 pharmacist committed to Pain Clinic (part time)

- 2 Part Time Clinical Pharmacists
  - 1 Clinical Coordinator
  - 2 Clinical Pharmacy Technicians
    - Polypharmacy
    - Tobacco Cessation
    - Anticoagulation
    - Lipid Clinic
    - Sole Provider
Technician Duties
Kimbrough Ambulatory Care Center, Fort Meade, MD

POSITION DESCRIPTION

- Clinical Activities (75%)
- Non-clinical Activities (25%)

RECORDED ACTIVITIES*

- Clinical Activities (60.6%)
- Non-clinical Activities (39.4%)

KACC Clinical Pharm Technician Impact

Clinical Pharmacist Utilization and Efficiency

BEFORE
[Nov2013 - Jan2014]

57% Meetings/Admin
43% Direct Patient Care

AFTER
[Feb2014 - Apr2014]

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

- 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

- Jan - Mar 2014: 94
- Apr - Jun 2014: 157
- Jul - Sep 2014: 160
- Oct - Dec 2014: 170

Pre-Clinical Pharmacy Technician

Established Clinical Pharmacy Technician
KACC Clinical Pharmacy Technician Impact

- 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
The Way Ahead

- Standardized Position Description for Clinical Pharmacy Technicians
- Designated DMHRSI codes
- Develop a “series” designation code (0661-06)
“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
“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 t-cons and disseminate them to the proper pharmacists as appropriate. The technician handles making appointments for patients and brings continuity to the clinical 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
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.
1. Some of the duties of the clinical pharmacy technician include:
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   d. All of the above
Closing Remarks

Beth E. Nytko, CPhT
Blanchfield Army Community Hospital
Fort Campbell, KY
beth.e.nytko.civ@mail.mil