



**Department of Pharmacy Services
Medication History Technician Training Checklist**

Orient and in-service pharmacy technician to their daily functions and responsibilities. Initial competence will be assessed through direct observation by the training technician/ pharmacist/ manager. **This form needs to be completed within 90 days from the date of hire or prior to independent staffing as the transitions of care technician, and returned to your Manager.**

Trainee's Name:	Date:
Manager's Name:	Date:

In-service Initials & Date	Functions & Tasks
	CS Link
	<ul style="list-style-type: none"> • Launching/logging into the program • Navigating through CS Link • Identifying ISP-CHF Patients • Screening ISP Patients • Identifying ISP group • Identify where patient is admitted from • Identify whether patient is Foundation or Non-Foundation • Print Medication Reconciliation Report in CS Link for a patient
	Running Medal > 3 Report
	<ul style="list-style-type: none"> • Running report and entering patients into Share Point
	Physician Schedules
	<ul style="list-style-type: none"> • Log onto ISP MD schedule site • Print out MD schedule • Identify physician • Check emails for ISP/CHF and MD medication reconciliation referrals
	Interviewing Patients
	<ul style="list-style-type: none"> • Print the PTA medication list from CS link • Check patient's language preference; contact interpreter services • Check patient's chart prior to entering room. Look for patient own med list and/or pink copy of security log sheet • Introducing yourself to patient • Explain reason for visit • Ask if patient has list or bottles in room • Ask open ended questions

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In-service Initials & Date	Functions & Tasks
	<ul style="list-style-type: none"> • Review all medications with patient (one by one): medication name, strength/dose, direction, indication • Ask about other medications: critical OTC medications, prescription creams, eye/ear drops, patches etc. • Re-ask questions regarding discrepancies found • Ask what pharmacy patient uses (multiple?) • Ask if patient has caregiver/home nurse who helps with medication management • Address any questions and refer to pharmacist
	<p style="text-align: center;">Calling Outpatient Pharmacies</p> <ul style="list-style-type: none"> • Introduce yourself • State reason for phone call • Ask pharmacy to fax medication list (3 months), if not: • Go over each medication one by one on the phone <ul style="list-style-type: none"> - Medication Name - Medication Strength - Medication Directions - Last Fill • Ask if you missed any other medication not mentioned • Requests for HIPPA Release <ul style="list-style-type: none"> - Printing out HIPPA Form - Request patient signature on HIPPA form - Filling out HIPPA Form
	<p style="text-align: center;">Calling Patient's Caregiver/Family Member</p> <ul style="list-style-type: none"> • Introducing yourself • State reason for phone call • Go over every medication with Caregiver/Family • Review other medications (e.g. critical OTCs, prescription patches, creams, ear/eye drops)
	<p style="text-align: center;">CS Link Modifications</p> <ul style="list-style-type: none"> • Add a new medication to the PTA med list • Modify a PTA medication • Delete/discontinue a PTA medication • Add notes to PTA medication based on interview
	<p style="text-align: center;">Skilled Nursing Facility (SNF) Medication Reconciliation (ISP & ECP)</p> <ul style="list-style-type: none"> • Stay up to date with emails RE: Discharges • Print After Visit Summary (AVS) • Call SNFs for Medication Administration Records (MAR) to be faxed • Reconcile AVS against SNF MAR • Write up summary of discrepancies • Identify which pharmacist will receive summary

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In-service Initials & Date	Functions & Tasks
	SharePoint (SNF)
	<ul style="list-style-type: none"> • Adding SNF patients
	Miscellaneous
	<ul style="list-style-type: none"> • Voicemails • HIPPA/Fax Cover forms • Interpreter Services • Kronos • HIPPA compliance
	Competencies and Observations
	Completed IPE competency in Healthstream
	Demonstrate completion of at least 3 PTA medication list profiles entered/updated in CS Link
	Demonstrates ability to manage time (goal of 20 minute medication history)
	Passed the pharmacy technician medication history competency (Score: _____ Date completed: _____)
	Passed the Technician Medication History proctoring form

Employee Signature: _____

Manager signature: _____

Date: _____