

MASSACHUSETTS SOCIETY OF HEALTH-CARE PHARMACISTS

MSHP Annual Meeting 2016

Pharmacy Extenders: The Involvement of Pharmacy Technicians in Medication History Collection

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Objectives

- Describe ASHP practice advancement initiatives for advance roles of pharmacy technicians
- Review training and methods of data collection used by pharmacy technicians in medication history collection
- Highlight the role of pharmacy technicians in medication reconciliation
- Discuss the development of a medication history collection quality assurance program

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ASHP Practice Advancement Initiative



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Audience Poll

- Who has heard of the Practice Advancement Initiative (PAI)?



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Practice Advancement Initiative (PAI) Overview



Transforming how pharmacists in acute and ambulatory settings care for patients

The Practice Advancement Initiative (PAI) is a profession-led initiative that is empowering pharmacists to take responsibility for patient outcomes in acute and ambulatory care settings.

Care Team Integration	Leveraging Pharmacy Technicians	Pharmacist Credentialing & Training	Technology	Leadership in Medication Use
<ul style="list-style-type: none"> • Promotes a team-based approach to health care • Validates the value of the health care team • Enables pharmacists to work with other health care professionals across the continuum of care • Enhances the relationship between pharmacists and patients by positioning pharmacists as healthcare providers 	<ul style="list-style-type: none"> • Empowers the pharmacist to ensure that pharmacy technicians perform all traditional pharmacy and distribution activities unless they are specifically advised otherwise • Urges technicians to take on additional and expanded responsibilities and authority to allow pharmacists to take greater responsibility for direct patient care • Promotes technician training and certification requirements, such as the nationally uniform standards for advanced technicians 	<ul style="list-style-type: none"> • Elevates the position of the pharmacist • Ensures pharmacists, residents, and students have the training and competency to deliver patient care safely and effectively • Promotes the use of credentialing to ensure services at the top of the scope of practice 	<ul style="list-style-type: none"> • Evaluates the available technologies to support patient safety and quality of care • Encourages use of evidence-based practice technology to improve patient safety, quality, and efficiency, while also reducing costs • Identifies emerging technologies to improve pharmacy practice 	<ul style="list-style-type: none"> • Empowers pharmacists to take responsibility for patient outcomes • Positions pharmacists to promote health and wellness, address therapeutic outcomes, and prevent adverse medication events • Emphasizes that given their education and training, pharmacists are uniquely positioned to lead outcomes

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PAI Questions Regarding Advancing Pharmacy Technicians

- S5.Q2. Is initiation of medication reconciliation, including obtaining and documenting patient medication information for pharmacist review, assigned to pharmacy technicians who have appropriate education and training at your hospital?
- S5.Q13. Are pharmacy technicians at your hospital certified by the Pharmacy Technician Certification Board?

Benefits of Completing a Self-Assessment

- Identify gaps
- Generates an action plan
- Links to resources supporting the recommendation
- Tracks performance
- Compares data generated with other hospitals

PAI Results: Massachusetts

- Total of 1,025 organizations have submitted data
- Overall score of 52% compliance with recommendations
- Northeast region has 171 organizations scoring at 50%
- Includes 26 of approximately 100 Massachusetts facilities
- Massachusetts facilities collectively scored 51%
- **Advancing technicians' role is the nation's lowest score at just 28% compliance with recommendations**

Advanced Roles for Pharmacy Technicians

Examples of expanded roles for pharmacy technician's

- Initiation of medication reconciliation including documenting patient medication information for pharmacist review
- Reviewing patient charts to identify medication allergies that require pharmacist follow up
- Criteria based screening of medical records to identify patients who may require pharmacist intervention
- Supervising other pharmacy technicians
- Managing medication assistance programs
- Preparing clinical monitoring information for pharmacist review
- Managing pharmacy department information technology systems and routine management of database and billing systems

Tufts Medical Center PAI Hospital Self Assessment

	2012 Results	2013 Results	2014 Results	2015 Results	2016 Results
	28%	44%	58%	69%	61%

Advancing the Use of Pharmacy Technicians

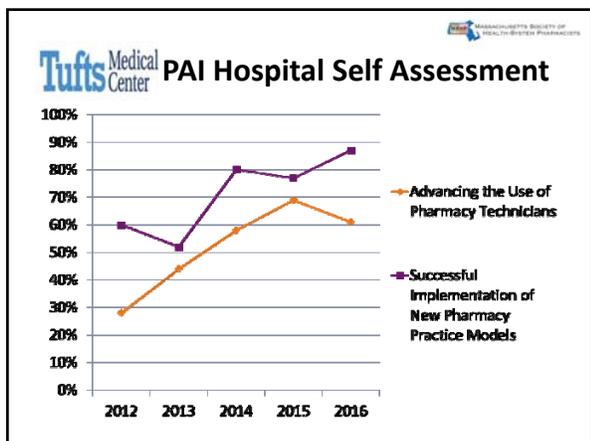
Contributing Factors:

- Team-based technicians
- Technician involvement in purchasing, IT, and the various pharmacy councils
- Successful assignment of tasks not requiring a pharmacist's clinical judgment to technicians

Opportunities for Improvement:

- Expand technician involvement in medication reconciliation to all areas
- State Law expansion to allow for advanced technician roles (Tech-Check-Tech)

*400 599 Bed Metropolitan Academic Medical Center/University Hospital with medical & pharmacy residency programs, taking 6 or more pharmacy students yearly



Team-Based Pharmacy Technician Program

- Pharmacy services organized into service delivery teams
 - Critical Care
 - Pediatrics
 - Cancer and Med/Surg
 - Procedural areas and Inpatient Psychiatry
- Technician assigned to each service team
 - Primary point of contact for service issues and drug distribution
 - Missing Doses
 - STAT Doses
- Provide innovative services
 - Medication history collection on admission

12

Tufts Medical Center
Department of Pharmacy
Team Based Technicians




At your service...

Medication distribution, storage and security they will assist in areas like:

- Finding and retrieving missing doses
- Facilitating the delivery of STAT medications
- Advising on regulatory standards related to medication handling and storage.

These technicians will also support additional services such as:

- Assisting in medication history collection

Please page TBTs M-F (7:30 AM - 4:00 PM) with the following information:

- Request (medication), pt's last name, MRN and Call back number.
- During off hours the papers will be directed to central at ext. 6-5389.
- Central Support technician will service procedural areas, and P2.



TBT Cancer/Med Surg:
Matthew Lawrence



TBT Pediatrics/Perinatal:
Anylisa Gonzalez



TBT Central Support:
Jasenka Tahirovic



TBT Critical Care:
Laura Palmarin

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Which of the following is NOT an advanced role for a pharmacy technician?

- A** Medication History Collection
- B** Medication Reconciliation
- C** Joint Commission Quality Assurance Program
- D** Supervising Technicians



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Training and Skill Set of a Medication History Collection Pharmacy Technician



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Requirements

- PTCB Certified
- Board of Pharmacy Registered
- Self-motivated
- Ability to multi-task
- Experience in retail setting
- Wants to speak to patients

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Pharmacy Technician Skill Set

Skills	Knowledge
<ul style="list-style-type: none"> • Communication skills • Organizational skills • Ability to decipher information • Professionalism • Exceptional bedside manner • Customer service • Infection control techniques 	<ul style="list-style-type: none"> • Medication names and classes • Parts of a medication order • Order entry process • Accessing the electronic health record system • Common barriers in collecting a medication history • Insurance terminology

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Standard Training

Time Frame	Content
Week 1	<ul style="list-style-type: none"> • Review job description and set expectations • Background reading • Competencies
Week 2	<ul style="list-style-type: none"> • Job shadowing • Automated dispensing cabinet training • Pertinent policy and standard operating procedure overview
Week 3	<ul style="list-style-type: none"> • Medication history collection patient examples • System training • Complete standard training checklist • Medication history collection resource training
Week 4	<ul style="list-style-type: none"> • Direct observations and medication history collection audit - minimum of 5 observed patient interviews

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Training and Resource Binder



Table of Contents

- Daily Workflow
- Directories
- Infection Control
- Medication Use and Storage
- Medication History Tools
- Retail/Community Pharmacy Resources
- Professionalism
- Outpatient Pharmacy Services

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Communication Training

- Professionalism
- Customer service etiquette
- Patient experience
- Effective communication techniques

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Professionalism Training

- iCare Training
- Cultural competency training
- HIPAA
- Respect

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Infection Control Training

- Transmission of infections
- Effective hand washing
- Garbing techniques
- Modified contact precaution types

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System Training

- Inpatient electronic medical record
- Outpatient electronic medical record
- Database training to print the med history collection form
- Outpatient pharmacy services

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Medication Knowledge Training

- Open ended questions
- Pharmacology review
- Insurance terminology
- Successful pharmacy handoff

Which of the following are a key skill set for a pharmacy technician collecting medication histories?

- A** Communication skills
- B** Organizational skills
- C** Clinical decision making skills
- D** A and B



The Role of a Pharmacy Technician in Medication Reconciliation



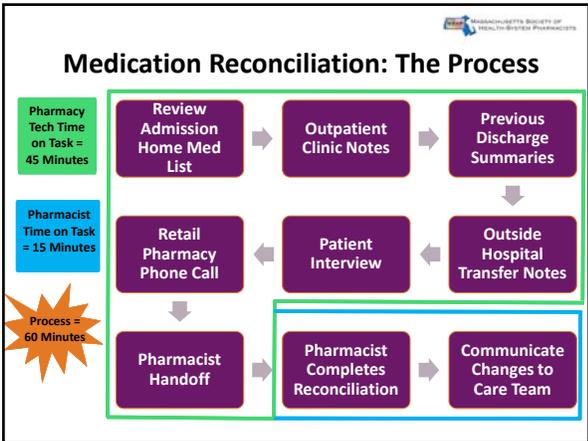
What is Medication Reconciliation?

- The Joint Commission defines medication reconciliation as:

“the process of comparing a patient's medication orders to all of the medications that the patient has been previous to admission.”
- It should be done at every transition of care in which new medications are ordered or existing orders are rewritten.

Pharmacy Technician’s Role in Medication Reconciliation

- Researching and documenting patient medication histories
- Supporting physicians, nurses, and pharmacists by obtaining information from patients and their care givers regarding home medications
- Being the “eyes & ears” of the pharmacist and providing important information regarding patient medication taking behaviors and compliance



Involvement of a Pharmacy Technician

- Involving a pharmacy technician in the medication reconciliation process allows a pharmacist to care for patients 45 minutes longer.
- Allows for the medication reconciliation services to be offered to a wider patient population.

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Gathering Patient Information

- Compare patients home medications to the what the patient is receiving while an inpatient.
- Note discrepancies in:
 - Drug name
 - Frequency
 - Dose
 - Route
 - Timing
 - Omissions
 - Previously discontinued

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Medication History Collection Form

Admission Medication Reconciliation

NAME: _____ SSN #: _____ SERVICE: _____
 AGE: _____ UNIT: _____ ADMIT: _____

Technician's Name: _____ Pharmacist's Name: _____

ALLERGY: _____
 No Known Drug Allergies
 Reviewed Allergy Information with Patient _____ Pharmacy Name and Number _____

Drug Name	Class	Med List	OSH Transfer Note	Rec'd Pharm	Patient	Drug Regimen and Comment (if present)
<input type="checkbox"/>	CEFPIS 1 G IV Q8H HAP/MPICAP PROTOCOL					
<input type="checkbox"/>	CYANOCOBALAMIN 1000 MCG PO QDAY					
<input type="checkbox"/>	FAT EMULSION 20% 100 ML IV Q24H REFUSE 30ML OVER 24HRS					
<input type="checkbox"/>	FOLIC ACID 1 MG PO QDAY					

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The Patient Interview

- The patient is a reliable source of the truth. However, the patient may not be able to participate in the interview.
- The med rec process does not stop there are other options include:
 - Reviewing pill bottles
 - Contacting retail pharmacy
 - Reviewing OSH transfer note

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Scripted Patient Interview

Introduction/Gather Retail Pharmacy Information

- "Hello Mr. /Mrs. /Ms. _____, my name is _____ and I am the pharmacy technician who helps care for patients on this floor. Do you think it is ok for me to spend a few minutes with you reviewing your medications?"
- "First of all do you have any drug allergies? (If they do) What happens when you take _____?"
- "I have a list of medications from your chart and want to make sure it is accurate. Do you have a list of your medications with you so we can compare?"
- "Are there any medications that you or your physician have recently stopped or changed? (If they have) When was the last time you had a dose of that medication?"
- "What is the name of the pharmacy where you usually have your prescriptions filled? Is that the only pharmacy or do you use more than one? Do you mind if we contact that pharmacy to clarify any medications questions?"

Closing

- "Thank you. This information is very helpful. I am going to share this information with the pharmacist who will be in to see you in a shortly."

Prepare and Present Records for the Pharmacist

- Call the patient's community pharmacy to obtain a list of medications and refill history then present the case and supporting documentation to the pharmacist

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Asking about PRN and OTC meds

<p>Document OTC medications:</p> <ul style="list-style-type: none"> • Vitamins • Supplements • Herbal medication 	<p>Document PRN medications:</p> <ul style="list-style-type: none"> • Ointments • Creams • Eye drops • Inhalers • Nasal sprays • Topical patches
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Retail Pharmacy Phone Call

- Some patients use a local retail pharmacy for newly prescribed or stat prescriptions
- They potential may use a mail order, specialty, or long term care pharmacy for maintenance medications



Pharmacist Handoff

- Note the discrepancy on the medication collection history form and where the discrepancy was uncovered.
- Always communicate the story behind the discrepancy to the pharmacist.



Performance Metrics Measured

- Total number of patients seen
- Time on task
- Patient demographics
- Number of home medications
- Number of discrepancies and type
- Resources used to obtain medication history



Which is NOT a step in the admission medication reconciliation process that can be completed by a technician?

- A Talking to patients in order to collect medication history data
- B Verifying admission medication orders
- C Verification of OTC medications
- D Contacting a retail pharmacy

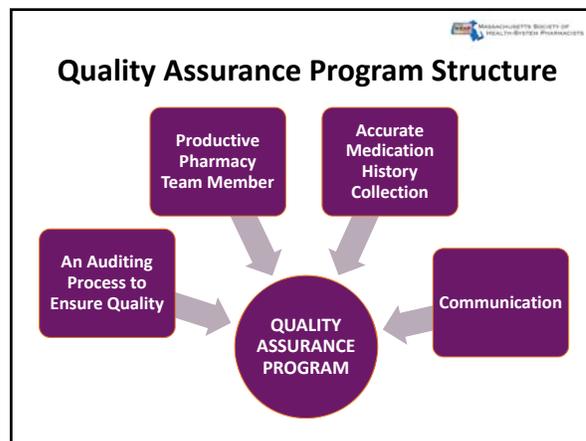


Development of a Quality Assurance Program



Goal of a Quality Assurance Program

- To create a patient-centered environment within the core service that we provide as a pharmacy department.
- To set expectations on:
 - Service
 - Culture
 - Communication

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Quality Assurance Program Procedure

- An audit is conducted during orientation and then quarterly to ensure communication is in alignment with creating a patient-centered experience.
- Key words always leave a positive impression when delivered in a sincere manner to the patients and can support the service culture.

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QA Criteria

- The quarterly audit will consist of a minimum of 3 observations per technician.
- The QA criteria should focus on technicians completing medication history collection from start to finish.
- The QA checklist states if the core components of this activity was completed all the time, most of the time, or not at all.
 - Most or not at all should result in further training.

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Pharmacy Technician QA Core Components

- **TECHNICIANS:**
 - Prioritizing patients
 - Accurately collecting a patient’s medication history using various sources
 - Following proper infection control techniques
 - Showing exceptional bedside manner
 - Clearly communicating with the patient and respecting the patients feelings
 - Informing the patient about pharmacy services
 - Contacting the retail pharmacy and obtaining a clear and concise medication list
 - Being a productive member of their pharmacy team

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What is the purpose of a quality assurance program?

- A Measure number of discrepancies uncovered during the medication reconciliation process
- B To monitor time on task
- C Create a patient centered environment based off service, culture, and environment.
- D To uncover common barriers to medication history collection



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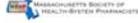
Key Takeaways

- Understanding PAI Results for your institution:
 - Understanding the results will allow you and your directors to identify gaps and create an action plan to advance pharmacy technician roles.
- Train and develop pharmacy technicians to collect medication histories:
 - Well trained pharmacy technicians can facilitate medication history collection allowing pharmacists to care for patients longer.
- Development of a quality assurance program ensure patient centered approach to care:
 - Technician criteria should focus on the steps from start to finish of the collection of a medication history.

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Questions





References

- Barnsteiner JH. Medication Reconciliation. In: Hughes RG, editor. *Patient Safety and Quality: An Evidence-Based Handbook for Nurses*. Rockville (MD): Agency for Healthcare Research and Quality (US); 2008 Apr. Chapter 38. Available from: <http://www.ncbi.nlm.nih.gov/books/NBK2648/>
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