

# **Advancing the Pharmacy Team: Innovative Roles for PTCB Certified Pharmacy Technicians**

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A podcast educational activity based on a live  
symposium conducted on December 7, 2009 in  
Las Vegas, Nevada

Available at  
[www.ashpadvantage.com/podcasts/](http://www.ashpadvantage.com/podcasts/)

## Activity Agenda

### **Trained, Tested, and Trusted: PTCB Update** (30 minutes)

Miriam A. Mobley Smith, B.S.Pharm., Pharm.D.

### **Innovative Pharmacy Technician Roles in Action** (30 minutes)

Rowell Daniels, Pharm.D., M.S.

### **Case Study: A Tech-Check-Tech Pilot Study in an Academic Medical Center**

(30 minutes)

Beth S. Williams, Pharm.D., BCPS

## Activity Faculty

### **Miriam A. Mobley Smith, B.S.Pharm., Pharm.D.**

Associate Dean

Chicago State University College of Pharmacy

Past-President, PTCB Certification Council

Chicago, Illinois

### **Rowell Daniels, Pharm.D., M.S.**

Director of Pharmacy

UNC Hospitals and Clinics

Chapel Hill, North Carolina

### **Beth S. Williams, Pharm.D., BCPS**

Director of Pharmacy

Wake Forest University Baptist Medical Center

Winston-Salem, North Carolina

## Activity Description

Pharmacy Technicians' roles in the pharmacy continue to change as the responsibilities of pharmacists expand. Working under the supervision of the pharmacist, technicians are now performing duties that allow the pharmacist greater flexibility for direct patient care and implementation of new programs. This activity will highlight innovative practices for pharmacy technicians that advance the entire pharmacy team, and outline the benefits of Pharmacy Technician Certification Board (PTCB) certification in seeking these career paths.

## Learning Objectives

After participating in this knowledge-based educational activity, participants should be able to:

- Describe innovative opportunities for Pharmacy Technician Certification Board (PTCB) certified technicians to assist the health-system pharmacy team.
- Discuss how pharmacists can be redeployed for clinical activities by utilizing certified pharmacy technicians.
- Describe the importance of including pharmacy technicians in medication safety, quality assurance programs, and information technology implementations.
- Explain the importance of pharmacy technician education, training, and certification in obtaining innovative positions.

## Continuing Pharmacy Education Information

### Pharmacists



The American Society of Health-System Pharmacists is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education. This activity provides 2 hours (0.2 CEUs) of continuing pharmacy education credit (ACPE activity #204-000-09-201-H01P).

### Pharmacy Technicians



The American Society of Health-System Pharmacists is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education. This activity provides 2 hours (0.2 CEUs) of continuing pharmacy education credit (ACPE activity #204-000-09-201-H01T).

## Format and Method

This continuing pharmacy education activity is available in two formats:

- **Web-Based CE.** An online activity consisting of audio and slides for three presentations, a post-test, and an activity evaluation tool.
- **Podcast.** An audio-only version of the presentation that can be downloaded to your computer or portable MP3 player, slides for three presentations (included in optional PDF handout), a post-test, and an activity evaluation tool.

Participants must view or listen to all presentations, take the activity post-test, and complete the course evaluation to receive continuing education credit. A minimum score of 70% is required on the test for credit to be awarded, and participants may print their official statements of continuing education credit immediately. The estimated time to complete this activity is 2 hours. This activity is provided free of charge.

## ASHP Advantage

### Instructions for Receiving Your CPE Statement Online

The online ASHP Learning Center allows participants to obtain their CPE statements conveniently and immediately using any computer with an Internet connection. To take the posttest and obtain your CPE statement for this ASHP Advantage Podcast activity, please follow these steps:

1. Type <http://www.ashpadvantage.com/podcasts> in your internet browser. Click on "Take Post Test" link under the name of the podcast.
2. Log in to the ASHP Learning Center using your e-mail address and password.
3. If you have not logged in to the new ASHP Learning Center (launched August 2008) and are not a member of ASHP, you will need to create a free account by clicking on "Register" at the bottom of the "Register as a New User" panel.
4. Click on the radio button next to the correct answer for each question. Once you are satisfied with your selections, click "Grade Test" to process your test and complete the remaining steps to complete the activity evaluation and print your CPE statement.

#### NEED HELP?

Contact ASHP Advantage at [support@ashpadvantage.com](mailto:support@ashpadvantage.com).

## Disclosure Statements

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The faculty and planners report the following relationships:

### **Miriam A. Mobley Smith, B.S.Pharm., Pharm.D.**

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Dr. Mobley Smith declares that she has no relationships pertinent to this activity.

### **Rowell Daniels, Pharm.D., M.S.**

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Dr. Daniels declares that he has no relationships pertinent to this activity.

### **Beth S. Williams, Pharm.D., BCPS**

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Dr. Williams declares that she has no relationships pertinent to this activity.

### **Elizabeth Riel**

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Ms. Riel declares that she has no relationships pertinent to this activity.

## **Miriam A. Mobley Smith, B.S.Pharm., Pharm.D.**

Associate Dean

Chicago State University College of Pharmacy

Past-President, PTCB Certification Council

Chicago, Illinois

Miriam Mobley Smith, Pharm.D., is the Associate Dean and Associate Professor at the Chicago State University College of Pharmacy. Prior to her appointment at Chicago State, she was on faculty for 12 years at the University of Illinois at Chicago College of Pharmacy, including serving as the Director of Experiential Education. Dr. Mobley Smith is an adjunct faculty member in the Allied Health, Nursing and Human Services Department at South Suburban College, South Holland, Illinois, and served on the curriculum advisory board, "Tech Prep Medical Professional" advisory committee and re-accreditation review team. She recently served as a member of the Institute of Medicine (IOM) Committee on the Future Healthcare Workforce for Older Americans. In addition, Dr. Mobley Smith was a U.S. Department of Health and Human Services 2005 Primary Healthcare Policy Fellow and an American Association of Colleges of Pharmacy 2006 Academic Leadership Fellow. She has chaired the PTCB Pharmacy Technician Certification Examination Standards Setting Committee, 2005 National Practice Analysis and was Past-President of the Pharmacy Technician Certification Board Certification Council.

She has delivered over 100 invited local, regional and national presentations and published in areas relative to her areas of focus. She has received numerous professional and civic awards including the 2006 Illinois Area Agencies on Aging Sid Granet Aging Network Achievement Award, 2005 Illinois Council of Health-System Pharmacists "Pharmacist of the Year", featured in the 2005 Aetna Profiles of African American Pharmacists (African American History Calendar) and the 2004 National Pharmaceutical Association's James N. Tyson Award in recognition of outstanding achievement in contributions to the profession of pharmacy. Dr. Mobley Smith received her B.S. in Pharmacy from the University of Michigan and Pharm.D. from the University of Illinois.

## **Rowell Daniels, Pharm.D., M.S.**

Director of Pharmacy  
UNC Hospitals and Clinics  
Chapel Hill, North Carolina

Rowell Daniels, Pharm.D., M.S., is Director of Pharmacy the University of North Carolina (UNC) Hospitals and Clinics in Chapel Hill, North Carolina. Dr. Daniels has served in numerous roles in his eleven years at UNC, including Assistant Director and Associate Director. In 2007, he was promoted to Director of Pharmacy at UNC Hospitals and Clinics. He has been actively involved in the implementation of Computerized Provider Order Entry, the implementation of advanced electronic rules-based decision making, as well as other tools and automation that advance clinical practice and pharmacy services. He has also chaired the UNC Hospitals' Medication Safety Committee for many years. Through this committee, he has helped implement numerous safe medication-use standards affecting physician, nurse and pharmacy practice standards and associated systems. As Director of Pharmacy at UNC Hospitals and Clinics, Dr. Daniels is now focused on enhancing mutually beneficial opportunities that exist between UNC Hospitals and Clinics and the UNC Eshelman School of Pharmacy.

Dr. Daniels received his Bachelor of Science in Pharmacy and Doctor of Pharmacy Degrees from the University of Georgia. He has also completed a two-year specialty residency and Masters degree program in Hospital Pharmacy Administration at the University of Wisconsin. After residency, Dr. Daniels served as Associate Director of Pharmacy at the University of Texas Medical Branch in Galveston, Texas.

Dr. Daniels' areas of practice interest include Information Systems and Automation, Medication Policy, Clinical Practice Models, and Performance Improvement.



**Beth S. Williams, Pharm.D., BCPS**

Director of Pharmacy

Wake Forest University Baptist Medical Center

Winston-Salem, North Carolina

Beth S. Williams, Pharm.D., BCPS is Director of Pharmacy at Wake Forest University Baptist Medical Center in Winston-Salem, North Carolina. Within the health system, Dr. Williams leads the acute care division of the corporate Department of Pharmacy. Her primary areas of interest include patient safety, quality improvement and continuity of care. Dr. Williams earned both her Bachelors of Science and Doctor of Pharmacy degrees from the University of North Carolina at Chapel Hill and completed a pharmacy practice residency at Wake Forest University Baptist Medical Center.



## Advancing the Pharmacy Team: Innovative Roles for PTCB Certified Pharmacy Technicians Trained, Tested, and Trusted: PTCB Update

**Miriam A. Mobley Smith, Pharm.D.**  
Associate Dean  
Chicago State University College of Pharmacy  
Past-President, PTCB Certification Council

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### Learning Objectives

1. Describe innovative opportunities for Pharmacy Technician Certification Board (PTCB) certified technicians to assist the health-system pharmacy team.
2. Discuss the role of certified pharmacy technicians in freeing up pharmacists for clinical activities.
3. Describe the importance of including pharmacy technicians in medication safety, quality assurance programs, and information technology implementations.



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### Self-Assessment Question

Have advances in the pharmacist's roles and responsibilities fostered an expansion in the roles and responsibilities of the pharmacy technician?

True

False



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## About the Pharmacy Technician Certification Board (PTCB)

The Pharmacy Profession's Program for Technician Certification

- o **Governing Organizations**
  - American Pharmacists Association (APhA)
  - American Society of Health-System Pharmacists (ASHP)
  - Illinois Council of Health-System Pharmacists (ICHSP)
  - Michigan Pharmacists Association (MPA)
  - National Association of Boards of Pharmacy (NABP)

The goal of the PTCB national certification program is to enable pharmacy technicians to work more effectively with pharmacists to offer safe and effective patient care and service. PTCB has certified more than 355,000 pharmacy technicians since its inception in 1995.



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## Future Vision of Pharmacy Practice Joint Commission of Pharmacy Practitioners

### Vision Statement

Pharmacy Practice in 2015:

Pharmacists will be the health care professionals responsible for providing patient care that ensures optimal medication therapy outcomes.



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## Action Steps to Support Vision

*“While the complexity and scope of medication use continues to grow, the role of pharmacists in caring for patients is expanding to help meet patient needs for safe and effective care. In addition to this important role for pharmacists, it is clear that safe medication use systems also require the support of well-qualified and competent pharmacy technicians.”*

- Excerpted from the 2008 letter written by John A. Gans, Pharm.D., Sc.D and Henri R. Manasse, Jr., Ph.D., Sc.D, Executive Directors of the APhA and ASHP, respectively



Gans JA, Manasse HR. Certification of Pharmacy Technicians. *J. Am. Pharm. Assoc.* 2008; 65:17-20.

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***“Appropriately educated and trained pharmacy technicians are a critical element to improving the safety and quality of health care. Nationally standardized education, training, and certification will allow technicians to better support pharmacists’ efforts to meet the medication management needs of patients.”***

**Lynnae M. Mahaney,  
ASHP President**



Press Release: ASHP Applauds Council’s Framework for Credentialing Pharmacy Technicians  
August 17, 2009, American Society of Health-System Pharmacists, Bethesda, MD

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### **Council on Credentialing in Pharmacy Pharmacy Technician Credentialing Framework**

**Mission:** *to provide leadership, guidance, public information, and coordination for the profession of pharmacy’s credentialing programs.*

**August 2009**

- 8 elements focus on improvement of education, training, certification, and regulation of pharmacy technicians
- Calls for State Boards of Pharmacy to:
  - Develop “pharmacy technician in training”
  - Require certification using a competency-based, psychometrically sound, nationally accredited, and task analysis based examination
  - Regulate pharmacy technicians
  - Require maintained competencies
  - Develop reciprocity between states



[www.pharmacycredentialing.org](http://www.pharmacycredentialing.org), Accessed August 19, 2009

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### **Pharmacy Workforce Challenges**

- Growing complexity of medication use
- Continued focus on medication safety, quality
- Increased public visibility, accountability
- Increased workload of pharmacists, and need for assistance from well qualified technicians
- Expansion of pharmacist roles and responsibilities



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## Pharmacy Technician Employment Expected to Grow

- The Bureau of Labor Statistics reports that *“the employment of pharmacy technicians is expected to grow much faster than the average occupation through 2016.”*
- A 32% increase in pharmacy technician positions was projected from 2006-2016, compared to the average 7-13% projected increase.
- The report also states that *“as cost-conscious insurers begin to use pharmacies as patient-care centers, pharmacy technicians will assume the responsibility for some of the more routine tasks previously performed by pharmacists.”*

Occupational Outlook Handbook Bureau of Labor and Statistics, 2008-09 edition [www.bls.gov](http://www.bls.gov)  
Accessed May 27, 2009



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## Patient-Focused Pharmacy Practice

Ensuring safe and effective medication use:

- Medication order review
- Evidence-based therapeutic recommendations
- Collaborative management of medication therapy
- Patient and health care provider education
- Medication-use process quality improvement
- Medication-related informatics, technology, automation
- Medication administration
- Disease prevention and health promotion



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## Pharmacy Practice Paradigm

- Pharmacists
  - Patient-centered care
  - Drug therapy management
  - Pharmacist-managed clinics
  - others
- Pharmacy technicians
  - Assist the pharmacist in delegated roles and responsibilities
  - Activities not requiring the professional (clinical) judgment of the pharmacist



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## Workload Delegation: Main Issues

- What constitutes “professional or clinical judgment?”
  - in your state?
  - in your facility?
  - in your opinion?
- Pharmacy Practice Act statutes and regulations
- Patient safety
- Liability
- Education and training
- Entrenchment?



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## Pharmacists Delegation of Technical Functions is Beneficial

- Facilitate expansion of patient-centered care services
- Improve overall patient care
- Increase pharmacy efficiency
- Enhance patient safety initiatives
- Reduce pharmacist stress levels
- Enhance professionalism



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## Pharmacy Technicians: Integral Members of the Pharmacy Care Team

- Work together with pharmacists to ensure optimal and safe medication use
- Help promote successful health outcomes
- Synergistic application of knowledge, skills, abilities and roles
- Allows engagement, expansion and sustaining high level services
- Improves job satisfaction and professional growth
  - Professional ownership
  - Organizational commitment
  - Career commitment



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## Pharmacy Technicians: New Roles-New Responsibilities

- Prescription refill requests, reminders and follow-up
- Patient appointment scheduling and follow-up
- Measuring and recording patient laboratory values
- Documenting medication adherence information
- Pharmacy calculations
- Investigational drug service
- Nursing unit and clinic medication inspections
- Inventory control specialists
- Medication assistance coordination
- Medicare Part D Specialist
- Technician Education
- Tech-check-tech
- Clinical technician
  - Anticoagulation, hypertension, diabetes, refill, medication assistance, pharmacokinetics, MTMS
- Pharmacy benefits manager
- Control substances inventory and audits
- Medication disposal and destruction
- Medication compounding
- Equipment calibration and maintenance
- Pharmacy buyer
- Third party insurance coordination
- Pharmacy training coordinator
- Quality assurance
- Patient safety officer
- College/school pharmacy lab tech




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## Components to a Strong Technician Workforce

- **Training**
  - Accredited training
  - Applicable training for the work setting
- **Testing**
  - Successful completion of Pharmacy Technician Certification Examination (PTCE)
- **Trust**
  - Adherence to state regulations, thus ensuring minimum requirements
  - Protection of the public




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**TRAIN...**




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## Education and Training

- Education and Training requirements vary by state
- Types of Programs
  - ASHP Accredited Training programs
    - >145 accredited or pending accreditation
  - Non-Accredited programs
  - On the job training
- Training Locations
  - High schools or vocational programs
  - Community colleges or technical colleges
  - Independent centers
  - Employer specific locations


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## ASHP Pharmacy Technician Initiative

- Pharmacy Technician Workforce is one of ASHP's top advocacy priorities
- Partnerships between ASHP and state affiliates advocate for state laws requiring as a prerequisite for state board registration:
  - Completion of an ASHP-accredited technician training program, and
  - PTCB certification
- Over 150 training programs accredited or pending accreditation by ASHP


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## NABP Task Force on Standardized Pharmacy Technician Education and Training

- February 2009-NABP Executive Committee accepted these taskforce recommendations:
  - Clarify terms used for pharmacy technicians
  - Support the recommendation that states **License or Register pharmacy technicians**
  - Encourage states that certify technicians to **recognize certification by PTCB**
  - Encourage reporting of pharmacy technician disciplinary information to the NABP and **Expand the NABP Licensure Transfer Program** to include technicians
  - Amend the NABP *Model Act* to include:
    - \*Pharmacy technician title until 2015, after which, the *Act and Rules* will require all technicians be certified
    - \*Guidelines for training to include high school diploma or GED AND competency based training approved by the State Board



NABP. Report of the Task Force on Standardized Pharmacy Technician Education and Training, February 2009. www.nabp.net




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## NABP Task Force on Pharmacy Technician Training and Education Programs

October 2009

### Charge:

- Review existing state requirements for technician education and training,
- Review requirements for national technician training program accrediting, organizations, such as the American Society of Health-System Pharmacists (ASHP);
- Recommend national standards for technician education and training programs and encouraging boards of pharmacy to recognize them.



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*TEST...*

## *The Profession's Program: Pharmacy Technician Certification Examination (PTCE)*



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## Self-Assessment Question

How does PTCB certification provide solutions for the pharmacy workforce and workplace empowerment for pharmacy technicians?

- It insures that individuals have met certain predetermined qualifications
- It is based on a national study of pharmacy practice from all states and across all practice settings
- It helps the technician to demonstrate a professional commitment to quality patient care.
- All of the above



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## PTCB Certification

**Certification: Voluntary process by which a nongovernmental agency or association grants recognition to an individual who has met certain predetermined qualifications specified by that organization.**



In December 2006, PTCB was accredited by the National Commission for Certifying Agencies (NCCA)

- NCCA is the accrediting body of the National Organization for Competency Assurance (NOCA), which accredits certification programs based on the highest quality standards in professional certification

NCCA Accreditation process included a comprehensive review of PTCB's certification program.



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## Pharmacy Technician Certification Examination (PTCE) Quality with a Track Record

- Widely recognized and trusted throughout the profession
  - Ensures that pharmacy technicians across the country adhere to the highest standards
- **Only certification endorsed** by the APhA, ASHP, and NABP
- Requires 20 hours of continuing education every 2 years to maintain certification
- Based on *national study of pharmacy practice*
- **Psychometrically sound**



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## Increasing Access

### *PTCB launched Continuous Testing in April 2009*

The continuous testing implementation strengthens PTCB's commitment to serving the pharmacy profession by enhancing our valid and reliable examination process.

Continuous testing provides numerous benefits to candidates, educators, and other PTCB stakeholders including:

- Faster exam results - Results are known immediately
- Increased choices of when and where to take the exam
- Scheduling flexibility that allows candidates to reschedule up to 24 hours prior to the exam
- Immediate, pass/fail notification, upon completion of exam



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## Record Numbers Apply Using On-Demand Format

- April-September, 2009 application numbers:
  - Over 25,000 pharmacy technicians applied using new format
- Employers applaud on-demand testing format:

*"PTCB certification provides the core skills and nationally recognized credentials necessary for pharmacy technicians to deliver optimal pharmacist support and patient care," said Kermit Crawford, Senior Vice President, Pharmacy at Walgreens. "Walgreens was the first to get behind PTCB certification and strongly supports the new continuous testing format because it creates daily access to the highest quality exam offered."*




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## PTCB Testing Network

- Professional, state-of-the-art, distraction-free testing centers
- Over 200 Pearson Professional Centers Nationwide
- Testing Sites for Military Personnel
  - Over 75 Dantes Centers Worldwide
  - Available in more than 14 countries including
    - Afghanistan and Iraq




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## PTCB National Statistics

Exam Date	# Who Sat For PTCE	# Who Passed PTCE	% Passed
1995 – 2000 Exams	91,741	73,705	80
2001 Exams	31,107	24,269	78
2002 Exams	33,794	26,917	80
2003 Exams	39,710	32,232	81
2004 Exams	41,245	32,114	78
2005 Exams	45,991	35,838	78
2006 Exams	49,689	32,319	65
2007 Exams	45,045	31,490	70
2008 Exams	50,015	34,871	70
2009 Jan. 5 to March 31	13,087	9,141	70
2009 April 1 to June 30	8,424	6,363	76
2009 July 1 to September 30	13,735	10,067	73
<b>TOTAL</b>	<b>463,583</b>	<b>349,326</b>	<b>75</b>

Total # Who Passed PTCE 339,259  
 Total # Who Completed Transfer Process 6,670  
 Total # of Certified Pharmacy Technicians 355,996




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## State Regulations

According to the 2009 National Association of Boards of Pharmacy (NABP) Survey of Pharmacy Law, 40 states regulate pharmacy technicians in a variety of ways:

- Registration
- Certification
- Requirements for Education and Training
- Requirements for Continuing Education
- Technician:Pharmacist ratio

28 states incorporate PTCB into their regulations



NABP. 2009 Survey of Pharmacy Law. Mount Prospect, Ill. 2008.



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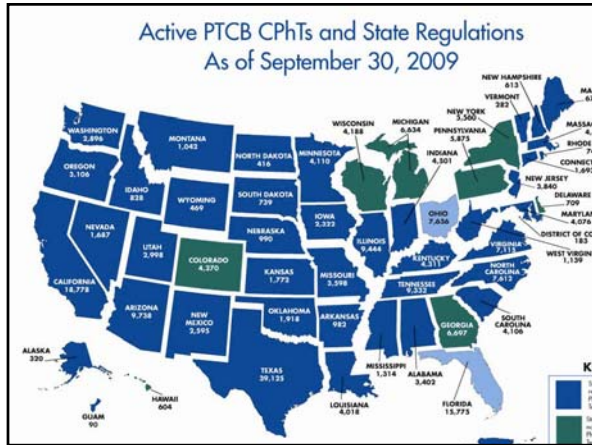
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## TRUST...

*PTCB assists state boards of pharmacy to develop and implement uniform standards for pharmacy technicians for the purpose of protecting public health.*



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## Impact of Pharmacy Technicians: Which Groups are Watching?

- Pharmacy organizations
  - 12 National Organizations recognize pharmacy technicians and their role in assisting pharmacists
  - Organizations include recommendations for:
    - training, education, certification, and regulation of pharmacy technicians
- Non-pharmacy organizations
  - Institutes of Medicine- Geriatric Competencies and Job Delegation
    - June 2009
    - Day-long program focused on addressing the healthcare needs of the aging US population
    - Pharmacy Technicians represented on the panel by PTCB



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## Emily's Law

Signed into law on January 7, 2009 by Ohio's Governor Ted Strickland, primary provisions require that pharmacy technicians be at least 18 years of age, have a high school diploma or equivalent (if hired after April 2009), and pass a board approved competency exam; the legislation also includes specific provisions related to technician training/education, criminal background checks and approved disciplinary actions.



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## PTCB Recertification Process

- Required Every 2 years
- 20 hours of CE must be obtained and submitted
  - Pharmacy related topics
  - At least 1 hour in pharmacy law
  - ACPE accreditation of CE is NOT required
  - A maximum of 10 hours may be received at the workplace
    - Under direct supervision of a pharmacist
    - Not for daily routine activities
  - One college course in Life Sciences or Math may be used each two years



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## PTCB Supported CE Programs

PTCB is committed to supporting quality CE programs

- Programs presented at:
  - ASHP Midyear Clinical Meetings and APhA Annual Meetings
    - Incorporate industry experts and pharmacy technicians
- ASHP Advantage CE programs available as webinars and podcasts
  - Offered for **Free; 2 hours of CE for technicians and pharmacists**
    - *Pharmacy Technician Workforce: Trained, Tested, Trusted*
    - *Pharmacy Technician Roles in Sterile Compounding: Challenges, Opportunities, and Competencies*
    - Available at [www.ptcb.org](http://www.ptcb.org) or [www.ashpadvantage.org](http://www.ashpadvantage.org)



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## Advancing the Pharmacy Team: Innovative Roles for PTCB Certified Pharmacy Technicians

Rowell Daniels, Pharm.D. M.S.  
Director of Pharmacy  
UNC Hospitals and Clinics  
Chapel Hill, NC

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### Learning Objectives

1. Describe innovative opportunities for Pharmacy Technician Certification Board (PTCB) certified technicians to assist the health-system pharmacy team.
2. Discuss the role of certified pharmacy technicians in freeing up pharmacists for clinical activities.
3. Describe the importance of including pharmacy technicians in medication safety, quality assurance programs, and information technology implementations.
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### What are the Common Skills Needed for Advanced Technicians Roles?

- A. Strong Computer Literacy
- B. Ability to Multi-task
- C. Ability to Work with Frequent Interruptions
- D. Strong Communication Skills
- E. All of the Above

Fung et.al. Nontraditional Roles for Certified Pharmacy Technicians JAPhA, Vol.46, No.4, July/August 2006



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### CPHT Skills Sets – Key Indicator!

- A. Strong Computer Literacy
- B. Ability to Multi-task
- C. Ability to Work with Frequent Interruptions
- D. Strong Communication Skills
- E. All of the Above

Fung et.al. Nontraditional Roles for Certified Pharmacy Technicians JAPhA, Vol.46, No.4, July/August 2006



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### About UNC Hospitals and Clinics



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### What is your role?

- A. Pharmacy Manager
- B. Pharmacist
- C. Departmental Educator
- D. Certified Technician
- E. Other?



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### Innovative Technician Roles at UNC Hospitals and Clinics

- Emergency Department Technicians
- Medication Safety Technician
- Pharmacy Education Specialist
- Pharmacy Informatics Specialist
- Quality Assurance Specialist
- Coming Soon: Decentralized Technicians



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### Emergency Department Pharmacy Technicians

- Reason for Implementation
- Primary Purpose
- Number of Staff
- Hours of Service
- Qualifications
- Training



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### The Joint Commission-National Patient Safety Goal 8

- Accurately and completely reconcile medications across the continuum of care.
  - Comparing Current and Newly Ordered Medications
  - Communicating Medications to the Next Provider
  - Providing a Reconciled Medication List to the Patient



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## What are the UNC Hospitals ED Technicians' Responsibilities?

YES	NO
Medication Histories	Medication Reconciliation
Documenting Allergies	Making Medications
Pharmacy Liaison / Troubleshooting	Running Codes
MAR Reprints	Administering Medications
Pyxis Support	Drug Interactions

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## Why are Technicians Important to this Role?




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## Adding Allergies in EHR

Description	Reaction	Type	Category	Date	Status
AMOXICILLIN	HIVES	Drug Allergies	PCN/CEPHALOSPOR	01/11/2005	Active
AMOXICILLIN	RASH	Drug Allergies	PCN/CEPHALOSPOR	04/18/2005	Active
DEMEROL	HALLUCINATION	Drug Allergies	MEPERIDINE	01/12/2005	Active
MEPERIDINE	CONFUSION	Drug Allergies	MEPERIDINE	04/18/2005	Active
PHENOTHAZINE	CONFUSION	Drug Allergies	PHENOTHAZINES	01/30/2006	Active

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## Updating Medications in EHR

**Drug Interaction: butalbital, aspirin, caffeine, and codeine/warfarin interaction**  
 Estrogens may increase the metabolism of Vitamin K Antagonists

Medication history Performed By Pharmacy Tech; Last Reviewed By LUCHEMILL, STACY at 02/28/2019, 10:28:44

Show Description by Generic Name    Show Description by originally entered name

	Description	Route	Dosage	Frequency	RX Instruct	Qty RxD	Refills	F
<input type="checkbox"/>	ADULT LOW DOSE ASA 81MG TAB	ORAL	81MG	ONCE DAILY		0	0	02G
<input type="checkbox"/>	CELECOXIB 200MG CAPSULE	ORAL	200MG	ONCE DAILY		0	0	02G
<input type="checkbox"/>	WARFARIN 5 MG TABLET	ORAL	5MG	AS DIRECTED	SEE PHARM INSTRUC	0	0	02G
<input type="checkbox"/>	DIAZEPAM 5 MG TABLET	ORAL	2.5M	TWO TABS		0	0	02G

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## The Price Is Right!

Do the Math!



- 5 Pharmacists - \$500,000 +
- 5 Technicians - \$200,000




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## ED Technician Challenges

- Timing Interviews
- Interviewing Patients
- Establishing Workspace
- Updating EHR with Sources
- Calling Pharmacies
- Informing Staff of Responsibilities




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## Pharmacy Technicians in the Emergency Department have...

- Improved Patient Throughput
- Decreased Medication and Allergy Errors
- Integral Part of the Future of Pharmacy Services
- Allowed Pharmacists to Maintain other Advanced Roles




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## Medication Safety Technician

- An investigator of all Adverse Drug Reactions (ADRs) and Medication Variance Reports (MVRs)
- Works in coordination with Medication Safety Officer




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## Med Safety Technician Responsibilities

- Reviews and investigates reports
- Produces additional factual information (ex. Lab results)
- Provides recommendations
  - Informatics, prescribing, dispensing, administration




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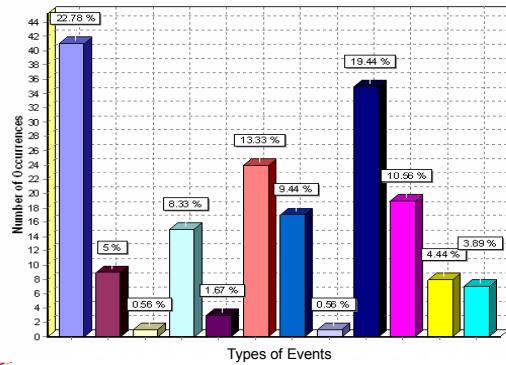
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**Attributable Cause of Total Medication Variances**  
(Includes all reports received from UNC Hospitals and Clinics)




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## Medication Safety Technician Benefits

- Timely Research
- Quality Recommendations
- Follow-through and Implementation of Solutions
- Impact on Med Safety Officer




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## The Following Best Describes New Employee Training at my Organization:

- A. Competency based
- B. Self-paced training
- C. On the job training – time permitting
- D. Only the strong survive

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## Pharmacy Education Specialist

- o Reason for Development
- o Primary Purpose
- o Number of Staff
- o Hours of Work
- o Qualifications
- o Training




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## Position Assignment Training

### DAY DELIVERY (DEL 2)

Weekdays Monday - Friday

#### Tasks/Responsibilities

Deliveries to Zone 2	Delivery # 1	07:00AM
PHSQA1W (ground fl)	Cardinal Assist, OMNLs, Stock-outs & Critical Lows	
PCU11 (2nd fl)	Restock all medications.	
PCU2 (2nd fl)		
NCC1 (4th fl)	Delivery # 2	09:00AM
NCC2 (4th fl)	OMNLs, Stock-outs & Critical Lows	
5CH	Restock all medications.	
CI0C (5th fl)	Assist Data Entry/Production Technicians	
6CH1	Delivery # 3	11:00AM
6CH2	Ivs., OMNLs, Stock-outs & Critical Lows	
7CH1	Restock all medications.	
7CH2		
3WH	Assist Data Entry/Production Technicians	
4LD1	Delivery # 3	11:00AM
4LD2	Ivs., OMNLs, Stock-outs & Critical Lows	
5WH1	Restock all medications.	
5WH2		
6WH1		
6WH2		
ONCA (3rd fl Gravelly)		
ONCB (2nd fl Gravelly)	Assist Data Entry/Production Technicians	

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## Order Entry Training

ORDER#	DESCRIPTION	START / STOP
20	271, M,AMR WAITING FOR 3 HOURS	03/23/09 09:45
	21 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	22 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	23 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	24 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	25 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	26 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	27 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	28 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	29 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	30 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	31 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	32 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	33 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	34 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	35 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	36 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	37 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	38 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	39 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	40 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	41 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	42 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	43 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	44 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	45 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	46 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	47 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	48 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	49 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45
	50 054-ADDS 2V 0 271, M,AMR X 1 HOURS	03/23/09 09:45

Choose the Reno Protective Order

A	Codon Saccharate BP (1) 100mg PO	50000	Formulary	Codon Saccharate
B	Codon Saccharate BP (1) 100mg PO	50000	Formulary	Codon Saccharate
C	Codon Saccharate BP (1) 100mg PO	50000	Formulary	Codon Saccharate
D	Codon Saccharate BP (1) 100mg PO	50000	Formulary	Codon Saccharate
E	Codon Saccharate BP (1) 100mg PO	50000	Formulary	Codon Saccharate

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## Additional Duties for the Education Specialist

- Mentor for New Employees
- Identification of New Processes
- Updating Training Materials
- Coordination of Technical School Students
- Future Efforts

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## Who Maintains Quality Assurance Audits at Your Organization?

- A. Pharmacists
- B. Technicians
- C. Clerical Staff
- D. All of the Above
- E. Audits? Who has time for audits?



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## Quality Assurance Specialist

- o Auditing Services
- o Regulatory Compliance
- o Departmental Safety Coordinator




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## Quality Assurance Specialist Audits

Audit Type	Frequency	Scheduled Day and Time	Location	Duration of Audit
Blood Factor Audit	Once a month	Tentative	IV Room, Billing Reports, Nursing Location & Medical Records	Ongoing
Bypass Pyxis Audit	Once a month	Tentative	Via report and patient's medical record	Ongoing
Bypass Pyxis Audit/Transfer of Narcotics Internally (OR Pharmacy, IDS, Prepacking & Gravely Pharmacy)	Once a month	Tentative	Via reports and records	Ongoing
Cardinal's Master Log vs. PSS 222's	Once a month	First week of the month	PSS Purchasing & Report provided by Cardinal	Ongoing
CII Safe	Tentative	Tentative	Narcotics	Tentative
CII Vault	Tentative	Tentative	Narcotic Vault	Tentative
Discontinued CII Orders	3 times per week	3 random days for 3 months (April 14th-July 14th 2009)	Via report and patient's medical record	Complete
Expired Narcotic Removal From Narcotics	Once a month	Tentative	Tamara will provide info needed to conduct audit	Ongoing
Patient's Medications Brought From Home	Once a month	Tentative	Equivalent Pharmacy	Ongoing
IV Room Narcotic Dispensing	Once a week	Wednesday	IV Room, Nursing Location & Medical Records	Ongoing
IV Room/Hood	Tentative	Tentative	IV Room & Nursing Location	Tentative
Look-Alike/Sound-Alike Drugs	Twice a week	Tuesday and Thursday	Via report	Ongoing
Narcotic Pyxis Access of Terminated Previous Employees	Every 60 days	Tentative	Narc Email	Ongoing
Night Exit	Once a week	Friday	Via report	Ongoing
OR Refill/ometer Log	Once a week	Friday	OR Pharmacy	Ongoing
Patient's Own Medications	Weekly	Tentative	3-6 Nursing Units per week	Complete
PBC Scheduled Drugs Received for Pharmacy Assistance Program	As Needed	Tentative	PBC Office	Ongoing
Petty Cash On-Hand	As needed upon termination or resignation	Tentative	Pharmacy Business Office	Ongoing
PSS 222 Forms Received and Used	Once a month	First week of the month	PSS Purchasing	Ongoing

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## Ongoing Quality Assurance

UNC Health Care Pharmacy Department

SALAD Compliance in Pyxis  
FY 08-09

Date	SALAD Drugs in Pyxis	SALAD Drugs Not in Compliance	Percent Compliant
March 25, 2009	1345	3	99.77
March 27, 2009	1346	0	100.00
March 31, 2009	1353	1	99.92
April 2, 2009	1356	2	99.85
April 7, 2009	1367	7	99.48
April 9, 2009	1359	3	99.77
April 14, 2009	1394	13	99.06
April 16, 2009	1385	13	99.06
April 21, 2009	1391	5	99.64
April 23, 2009	1398	3	99.78
April 28, 2009	1395	3	99.78
May 6, 2009	1370	8	99.41
May 12, 2009	1398	12	99.14
May 15, 2009	1392	13	99.06




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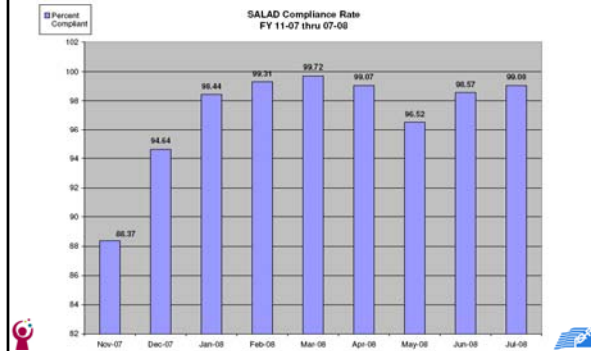
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## Data Trending and Analysis



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## Who Scares You the Most?

- A. State Board of Pharmacy
- B. Joint Commission
- C. CMS / RAC Auditors
- D. All of the Above



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## Quality Assurance Specialist Insurance

- Certification
- Reviews
- Compliance
- Continual Readiness
- Identification of Improvement Opportunities
- Benefits to Pharmacists

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## Decentralized Technicians

- Reason for Development
- Primary Purpose
- Number of Staff
- Hours of Work
- Qualifications
- Training




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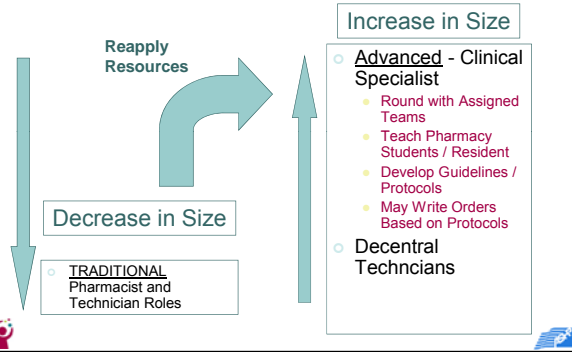
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## Reallocation of Pharmacist and Technician Resources




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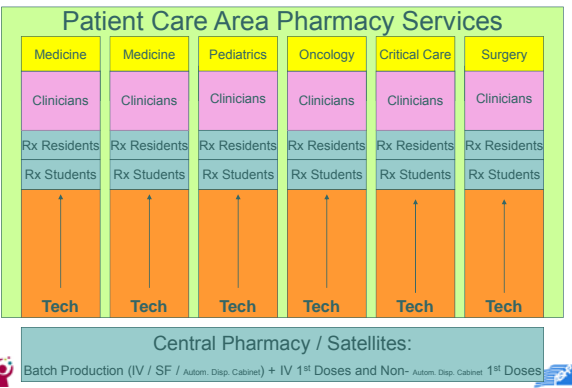
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## UNC Acute Care Model




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### Decentral Technician Responsibilities

- Heavy customer service
- Drug distribution coordination
- Order entry
- 1<sup>st</sup> call for missing doses
- Coordinate STAT doses



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### Decentral Technician Responsibilities

- Medication deliveries to their areas
- Relocate tubed items
- Maintain Automatic Dispensing Cabinets
- Maintain Med Rooms



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### Results of a Successful Decentral Technician Program

- Improved Drug Distribution Accuracy
- Improved Turn Around Times
- Decreased Missing Doses
- Increased Nursing Satisfaction
- Increased Clinical Pharmacy Time



Mark SM, et al. Innovative Roles for Pharmacy Technicians: Developing and Implementing a Unit-Based Clinical Support Pharmacy Technician Model. HospPharm Vol 43, N 11, p920-927



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### Benefits of Innovative Technician Roles

- Better Work Schedule
- Increased Salary
- Increased Job Satisfaction
- Increased Admiration
- Autonomy
- Sense of Personal Ownership
- Ability to Impact Outcomes



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### How many of these roles exist at your practice site?

- All 5, 4, 3, 2, 1, None?
  - Quality Assurance Specialist
  - Medication History Technicians
  - Medication Safety Technician
  - Pharmacy Education Specialist
  - Pharmacy Informatics Specialist
  - Decentralized Technicians



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## Advancing the Pharmacy Team: Innovative Roles for PTCB Certified Pharmacy Technicians

### Case Study: A Tech-Check-Tech Pilot Study in an Academic Medical Center

Beth S. Williams, PharmD, BCPS  
Director of Pharmacy  
Wake Forest University Baptist Medical Center  
Winston-Salem, NC

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## Objectives

- Describe one of the innovative roles for PTCB certified technicians at WFUBMC
- Describe experience with a “tech-check-tech” model of medication distribution
- Describe a regional initiative to expand technician roles in North Carolina
- Describe efforts with the North Carolina Board of Pharmacy to recognize advanced technician roles



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## Wake Forest Baptist

- 821-bed academic medical center
  - Tertiary referral center
  - Level I trauma/burn center
  - Brenner Children’s Hospital
- Department of Pharmacy
  - 192 FTE’s
    - 91 Technicians
    - 47 (52%) CPhT’s
  - Highly automated medication use process
    - Hybrid drug distribution model
    - Extensive patient care services



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## Vision for Pharmacy Practice

- Services and processes will be patient-centered.
- Pharmacists and pharmacy technicians will provide patient care services as close to the point of care as possible.
- Pharmacists will be the healthcare professional responsible for providing patient care that ensures optimal medication therapy outcomes.



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## Vision, cont.

- Automation and technology will be integrated throughout the medication use process to enhance safety and improve efficiency.
- Medication preparation and distribution processes will be technology-driven and technician-managed.



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## The Key

*The pharmacy technician is an essential component in achieving this vision for pharmacy.*



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### Question #1

I agree that...

*The pharmacy technician is an essential component in achieving this vision for pharmacy.*

- Agree = Green
- Disagree = Red
- Undecided = Blue



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### Innovative Role: Medication Reconciliation Technician



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### Medication Reconciliation Technicians

- Team of 11 Certified Pharmacy Technicians
- Collect & document home medication lists (HML)
- Service provided 24 hours per day, 7 days per week
  - ED admissions
  - Pre-Operative Assessment Clinic
  - Surgery Holding Room
  - Transfers and direct admits
  - Elective admissions
    - Patient may call or is contacted by Pharmacy Technician up to 72h prior to admission



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## WFUBMC Med Rec Process

- Pharmacy Technician collects/documents the home med list
- Nurse confirms or documents updated list as part of admission assessment
- Physician orders admission medications using the home med list
- Pharmacist receives admission orders; reconciles the admission med list vs. the home med list




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## Preferred Characteristics

- Self-motivated
- Able to multi-task
- Excellent communication skills
- Advanced decision-making skills
- Experience in retail setting




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## Tech-Check-Tech Model of Drug Distribution



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### Question #2

- Is tech-check-tech utilized in your practice setting?
  - Yes = Green
  - No = Red



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### Tech-Check-Tech

- The Evidence
  - Technicians are less prone to make errors in checking versus pharmacists\*
- The WFUBMC Pilot
  - Under waiver approved by NCBOP
  - Implemented April 2009; current model 8/3/09
  - ADM restocking



\*Am J Health-Syst Pharm.2002; 59:1183-8



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## Tech-Check-Tech

- Technicians must be well-trained, experienced, certified, competency assessed
- Six (6) Validated Pharmacy Technicians
  - PTCB certified pharmacy technician (CPHT)
  - At least 1-year experience in unit-dose dispensing
  - Complete didactic and practical training
  - Initial validation requires 99.8% accuracy for 1500 consecutive doses over five audits
- Quality assurance audits performed routinely to validate accuracy



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## Tech-Check-Tech

- Experience as of 9/25/09
  - 265,323 doses filled & checked
    - 10% random RPh check has detected one error
      - One (1) extra dose of the correct drug was picked
  - Average doses/day checked by a technician = 5,102 (~60% of non-IV doses)
- November 2009 update



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## Regional Initiative



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## Pharmacy Technician Workforce Coalition

- Formed in 2007
- Consists of the following partners:
  - Davidson County Community College
  - Forsyth Technical Community College
  - Guilford Technical Community College
  - Northwest Area Health Education Center
  - Forsyth Medical Center
  - Moses Cone Hospital
  - Wake Forest University Baptist Medical Center



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## Purpose

*To address a growing need for quality pharmacy technicians who, as recognized in numerous studies, are essential for the advancement of the pharmacy profession. Specifically, the associate degree technician will assume an advanced role within the pharmacy profession which will allow pharmacists to more fully transition into the medication safety and patient care roles that both regulatory and professional organizations promote as the areas where pharmacists add value and improve the quality of patient care.*



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## AAS in Pharmacy Technology

- Grant funding
  - To develop curriculum
  - To implement & coordinate in 3 community colleges
- Implemented August 2009
- First graduates expected to join the workforce in May 2010
- Curriculum now available throughout the NC Community College system



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## Vision

To create and adopt a tiered pharmacy technician structure, including an advanced role, in order to ensure quality patient care and reduce medication errors. This structure will support a medication distribution process which is technician-managed and technology-driven, subsequently allowing pharmacists to focus more fully on quality of care and patient safety. In order to support this practice model, the skills and credentials of the current technician workforce must be defined and standardized.

The ultimate goal is to mandate that all pharmacy technicians become certified through PTCB and that a critical mass will hold an associate degree, enabling them to assume key responsibilities currently delegated to pharmacists.



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## Question #3

- Does your state Board of Pharmacy recognize the AAS degree as a credential for advanced technician roles?

- Yes = Green

- No = Red



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## State Board of Pharmacy Initiative



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### Question #4

- Does your state Board of Pharmacy recognize advanced technician roles?
  - Yes = Green
  - No = Red



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### Proposed Rule

- To allow for expansion of pharmacy technician roles in the hospital/acute care setting
  - Presented in May 2009
  - Approved in concept in August 2009
  - Began the process of drafting language for revised rule in September 2009
  - Presented to Board in November 2009



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### Proposed Rule

- Creates the role of Advanced Pharmacy Technician
- Encourages use in the acute care setting to facilitate "the delivery of clinical services by pharmacists."
- Requirements:
  - Registered with the North Carolina Board of Pharmacy
  - Certified (PTCB certification)
  - Holds an associate degree in pharmacy technology\*

\*conferred by a NC Community College or accredited by ASHP



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## Proposed Rule, continued

- Advanced Pharmacy Technician
  - "May validate the work of other pharmacy technicians in connection with the filling of floor stock and unit dose distribution systems for acute care hospital inpatients."
    - Stocking of patient care unit and ancillary medication inventories
    - Stocking of automated medication dispensing cabinets
    - Stocking of medication cassettes/trays for emergency code or anesthesia carts
    - Prepackaging of medications\* within the hospital pharmacy

\*Does not include the final verification of compounded products, sterile or non-sterile



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## Question #5

- Does your state Board of Pharmacy recognize PTCB certification as a credential for advanced technician roles?
  - Yes = Green
  - No = Red



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## Summary

- PTCB Certified Pharmacy Technicians
  - Can play a key role in safe medication use
  - Should own the medication distribution process
  - Are essential to advancing pharmacy practice



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