

Right Work, Right Role: Improving Quality in Ambulatory Care Through Pharmacy Technicians



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Objectives

- Describe and outline the role of an Ambulatory Pharmacy Technician within an outpatient pharmacy setting.
- Examine and evaluate the day-to-day responsibilities of an Ambulatory Pharmacy Technician, including how performance and outcomes are measured.
- Identify and discuss current challenges and barriers associated with the role.
- Highlight future objectives and goals, along with a strategic roadmap for achieving continued growth and improvement within the role.

Introductions



- 7+ years pharmacy experience.
- Prior experiences:
 - Manager of patient services at Shields Health solutions
 - Adjudication Specialist at Medly Specialty Pharmacy
 - Lead Pharmacy Technician at Rite Aid Pharmacy
- Joined NewYork-Presbyterian Hospital 04/2025

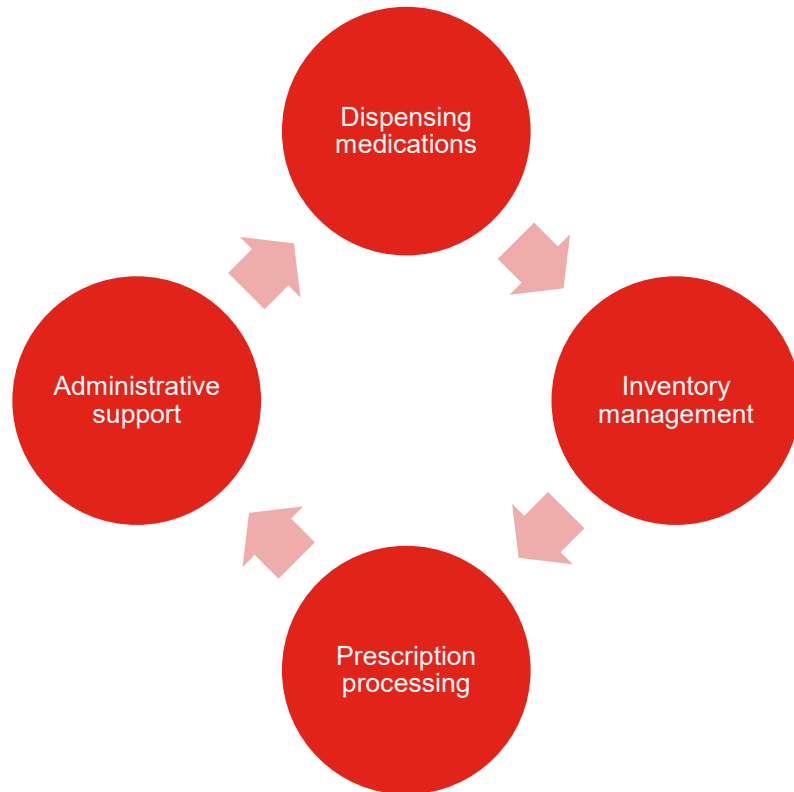


- 16+ years of pharmacy experience.
- Prior experiences:
 - Specialty Services at Mount Sinai Specialty Pharmacy,
 - Inpatient pharmacy at Mount Sinai Health System
 - Lead Certified Pharmacy Technician at CVS Pharmacy.
- Joined NewYork-Presbyterian Hospital 04/2025

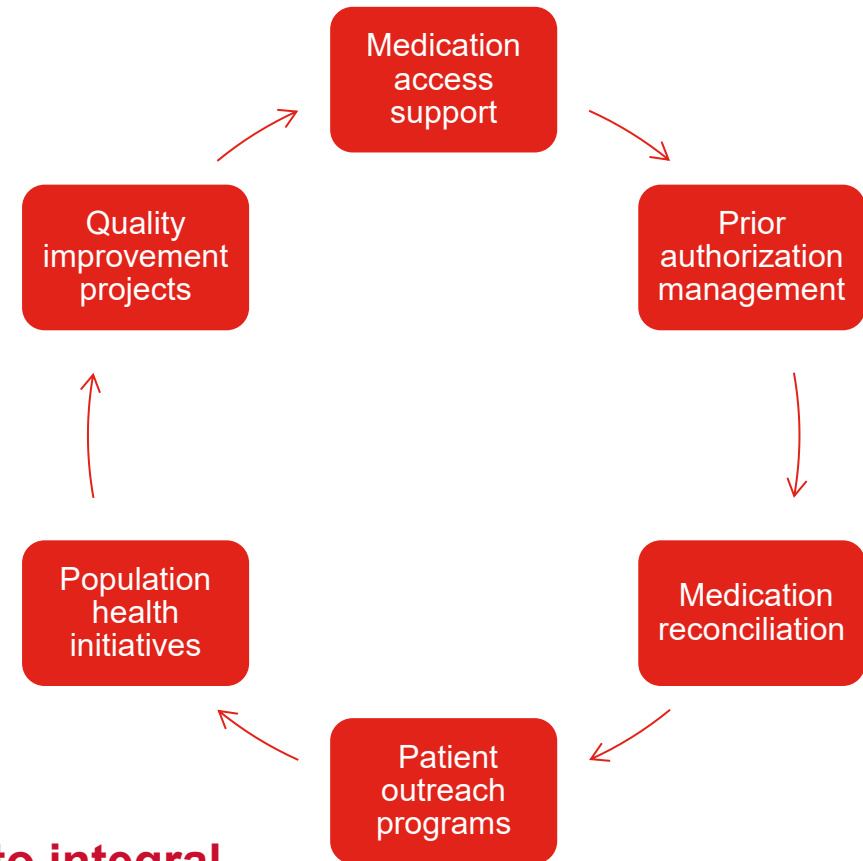
Background

Technician Role Evolution: Then vs Now

Then

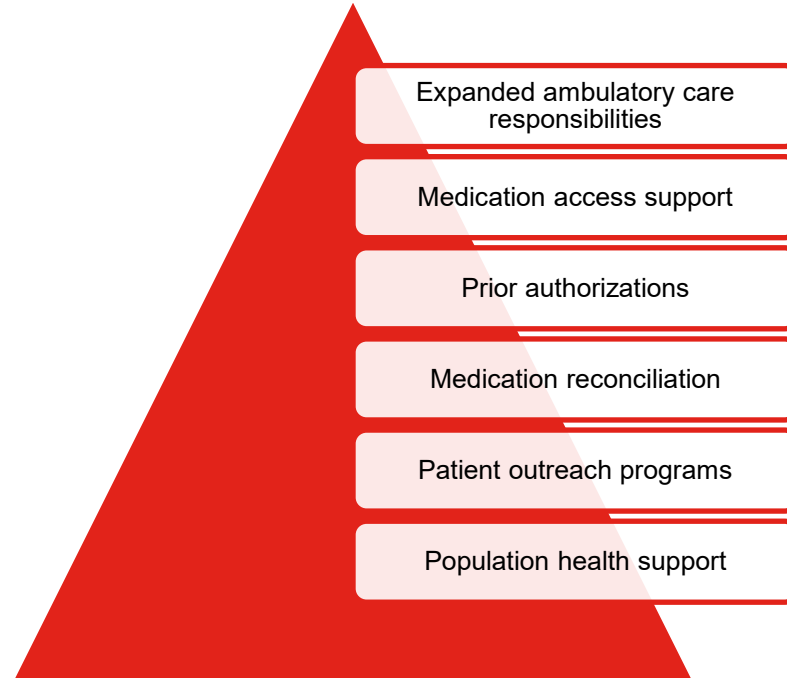


NOW



Technicians have evolved from operational support roles to integral members of patient-centered healthcare teams.

Ambulatory Pharmacy Technicians



92% Best Possible
Medication History
completion
completion rate

52.7% less
pharmacist
workload

Increased clinical
pharmacist time

Improved
adherence
outcomes

Expanded patient
access

Advanced
technician
responsibilities

Our Experience

Identified Needs

Increasing
administrative tasks
placed significant
strain on clinicians

Agency staff
temporarily alleviated
these demands, but a
sustainable solution
was necessary

Plan–Do–Study–Act (PDSA) Framework

A quality improvement initiative was conducted to evaluate and optimize ambulatory pharmacy technician workflows:

PLAN

Ambulatory care pharmacy technicians (2 FTEs) were recruited in Spring 2025 ahead of contract sunset in April/May 2025

DO

Role delineation exercises were completed: optimizing existing tasks and incorporating new responsibilities

STUDY

Productivity metrics were analyzed and shared in huddles to promote transparency, engagement, and feedback

ACT

Improvement efforts included developing benchmarks and targeted collaboration to address opportunities

Standardization of Workflows

- Workflows were created to drive standardization and operational efficiency
- Structured a coverage schedule to ensure coverage
- Full onsite onboarding before a hybrid model

Ambulatory Care Pharmacy Technician Workflow	
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Day-to-Day Responsibilities and Outcomes

Responsibilities

Prior Authorizations
(**new**: in-basket ePA
workflow)

Coordination of
specialty drugs clinic
deliveries

Monthly clinic
inspections

Triaging medication
requests: Ambulatory
Care Pharmacy
Technicians [13153]
(**new**)

Clinic medication
histories (**new**)

Remote patient
monitoring (RPM)
hypertension program
administrative tasks
(**new**)

Electronic Prior Authorization Workflow

Process Flow:

1. Provider Submission

Provider requests a prior authorization when ordering a medication.

2. In-Basket Review

Request is routed to the designated work queue for processing.

3. Insurance Verification

Patient insurance coverage is reviewed and verified.

4. Clinical Documentation

Complete required clinical questions and attach

supporting rationale when needed.

5. Outcome Notification

Receive approval or denial determination from the payer.

6. Outcome Documentation

Document the final determination in the patient's medical record.

Medical Prior Auth (PA) vs Pharmacy Prior Auth (PA)

Aspect	Medical PA	Pharmacy PA
Scope	Medical prior authorization is insurance approval for a medical service or a medication billed under the medical benefit, such as an injection given in a clinic.	Pharmacy prior authorization is insurance approval for a prescription medication covered under the pharmacy benefit and dispensed through a pharmacy.
Process	Collaboration with specialty team members; requires diagnosis codes, NPIs, facility info where medication is administered	Initiated by retail pharmacy or clinical team at the time of order entry; requires drug-specific info
Approval Basis	Medical necessity based on clinical guidelines	Formulary compliance and therapeutic appropriateness

The process to complete prior auth remains the same, except different information that might be required.

Long-Acting Injectable Medications

Loading dose &
maintenance
doses

Strict dosing
window (i.e., 7-
day grace
period)

High-cost &
specialty drugs

Patient
adherence

Cross functions
coordination

Current Tracking System

Maintains a centralized Excel tracker for all Long-Acting Injectable (LAI) patients, organized by clinic location for easy monitoring.

Provides real-time visibility into patients currently receiving LAI therapy across participating clinics.

Tracks insurance coverage details, including whether medications are billed through pharmacy or medical benefits.

Monitors medication shipment and receipt status to ensure LAIs are delivered and available in clinic before scheduled administration.

Serves as a live, continuously document that reflects daily changes in patient enrollment, coverage, and inventory status.

Coordination of Specialty Drugs Clinic Deliveries

Standard Operating Procedure – Injectables (Clinic Administered Medications)

Drug Class
Antiretroviral Injectables
Osteoporosis Injectables
Vivitrol

- Standardize processes across clinics
- Centralize document for multiple drug classes
- Define internal roles and their part with the LAI delivery coordination

Coordination of Specialty Drugs Clinic Deliveries Workflow

Provider enters the order

Specialty liaisons start a benefit investigation. If pharmacy benefit is denied, then the patient is forwarded to the ambulatory pharmacy technicians to perform medical benefit investigation.

Ambulatory pharmacy technicians notify the provider of the outcome, and the encounter is forwarded to the clinical pharmacist for patient counseling.

Clinical pharmacist performs counseling and documents the target injection window.

Clinical pharmacist routes the encounter to ambulatory pharmacy technicians to coordinate delivery with the dispensing pharmacy. If the medication is covered under medical benefits, technicians inform the nursing staff to order the medication via floor stock.

Medication Tracing



Medication tracing is the process of following a medication through each step of care to ensure it is ordered, stored, prepared, dispensed, documented, and monitored safely according to Joint Commission standards.



Technicians complete the tracing at the beginning of every month and submit an observation via the joint commission portal.



Ensure safe medication practices and continuous regulatory compliance while supporting high-quality patient care.

Monthly Clinic Tracing Workflow

Tracer Review Includes:

- Medication storage
- Refrigerator monitoring
- Medication labeling
- Expiration date review
- Patient-owned medications
- Medication preparation areas

Complete
Tracer Review



Document
Findings



Follow-up &
Close Findings

	June	July	August	September	October	November	December
Clinic 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1
Clinic 2	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1
Clinic 3	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1
Clinic 4	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1
Clinic 5	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1	Pharmacy Technician 1
Clinic 6	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2
Clinic 7	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2
Clinic 8	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2
Clinic 9	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2
Clinic 10	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2	Pharmacy Technician 2

Triaging In-Basket Requests

Clinical Pharmacy Managers	Pharmacy Technicians	Pharmacy Liaisons
- Ongoing independent management / visits (per referral) for: - Asthma - CKD - COPD - Diabetes - Heart Failure - Hypertension - PrEP/PEP - Smoking cessation - Remote patient monitoring (RPM) – Hypertension program - Patient education and counseling (e.g., CGM Group Appts, injection teaching, etc.) - Drug information (DI) questions	- Any medication prior authorizations (PAs), financial assistance, and PA appeals <u>not covered by liaisons</u> - Medical benefits for specialty medications “MD not enrolled in Medicaid” requests - Medication histories for clinic patients who: - Take over 5+ medications daily - Have upcoming appointments with questionable medication list - Were recently seen and unable to recall home medications - Coordination of specialty medication clinic deliveries - Triage of “patient calls” in-basket messages related to medications - Monthly clinic inspections	- Medication PAs, financial assistance, PA appeals, and patient assistance program applications (PAPs) for most specialty medications - Assist patients with medication deliveries / coordination from Hospital Specialty pharmacy
Virtual/Onsite M-F, 9-5 pm In-person Tues & Fri Pool Name: PHARMACIST POOL	Virtual/Onsite M-F, 9-5pm In-person Mon, Tues, Wed, Fri Pool Name: AMBULATORY CARE PHARMACY TECHNICIANS	Virtual M-F Pool Name: SPECIALTY LIAISON

- Introduced new Ambulatory Care Pharmacy Technicians Pool
- Centralize requests for ambulatory pharmacy technicians
- Direct appropriate traffic to capitalize on pools

Clinic Medication Histories

Clinic Medication History

Patient Name: @NAME@
Account #: @CSN@
MRN: @MRN@

Informant/Interpreter
Informant: {participants:27086}
Interpreter used: {yes/no:26163}

PCP Provider:

Problem List
@PROB@

Objective
@ALLERGY@
@HMEDS@

Source of Information:

- ☐ Patient/Caregiver recall
- ☐ Outpatient pharmacy
- ☐ Outside provider
- ☐ Outside record (i.e., nursing home med list)
- ☐ Chart review documentation
- ☐ Other – please indicate where:

Assessment/Plan

Initial medication history completed and identified the following:

1. Difference in dose/frequency reported by patient/pharmacy vs. listed in Epic:
2. Medication(s) patient is/are no longer taking based on the last fill date:
3. Medication(s) patient is/are taking that was missing from Epic:
4. Other:

Initial medication history completed by pharmacy technician, pending pharmacist review.

@PREFPHARMACY3@
@DATE@ @ME@

Total time spent *** mins

Standardize documentation to improve consistency and accuracy

Clinical pharmacist review following the initial medication intake

Improve patient safety by identifying and resolving medication discrepancies early.

Remote patient monitoring (RPM) hypertension program administrative tasks

What is RPM?

RPM allows patients to check blood pressure at home and securely send readings to their healthcare team.

Goal: Improve blood pressure control between office visits.

Why It Matters

- Improves patient engagement
- Helps providers identify issues sooner
- Supports continuous care between visits
- Reduces administrative burden on clinical staff

Key Technician Responsibilities

Complete technology assessments

Verify patient demographics

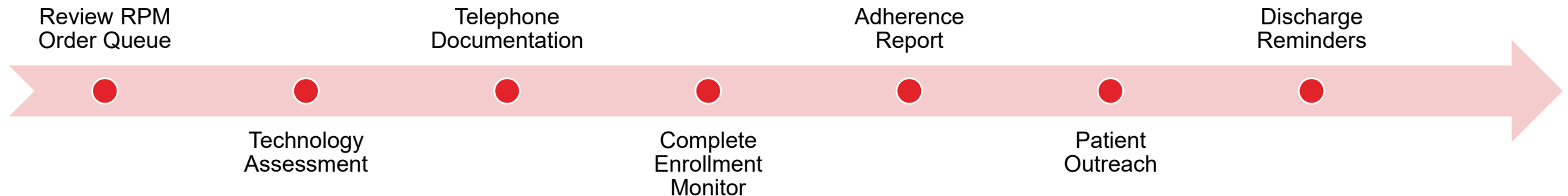
Perform enrollment outreach

Manage flowsheet settings

Monitor adherence reports

Conduct reminder calls/messages

Process discharge reminders



Productivity Metrics and Key Performance Indications (KPIs)

	Prior auth related task	Coordinating delivery of clinic admin meds	In-basket msg triaged	RPM enrollment assistance	RPM adherence reminders	Monthly clinic inspection	Clinic med history	RPM discharge reminders	RPM triage to pharmacist
Jan	1223	398	161	53	61	10	13	2	
Feb	1078	406	133	34	7	10	3		5
Mar	1464	482	147	31	10	10	1		
April	1157	470	147	22	11	10		2	2
May	1046	347	131	13	3	10			
June	1100	441	216	41	12	10		5	
July	597	206	88	16	7	10			
Grand Total	7665	2750	1023	210	111	70	17	9	7

****Data as of June 2026***

Patient Impact & Success Stories

Long-Acting Injectable (LAI) Coordination



During review of the LAI tracker, the technician identified a patient who had canceled an injection appointment, was nearing the end of the dosing window, and did not have medication available in clinic. The technician immediately alerted the care team.



The technician identified that the dosing window would expire in three days. The provider confirmed continued therapy, and the nursing team learned the patient had canceled due to travel and would return on the final day of the dosing window.



The technician coordinated with the pharmacy team to ensure timely medication delivery and availability in clinic upon the patient's return, through discussions across multiple disciplines in a tight timeframe.



Through proactive oversight and interdisciplinary collaboration, the patient received the injection on the last day of the dosing window, avoiding a missed dose and interruption in therapy.

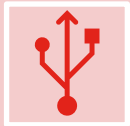
Remote Patient Monitoring (RPM)



A provider referred a patient with uncontrolled hypertension to the Remote Patient Monitoring (RPM) program. The goal was to begin monitoring blood pressure readings between office visits so the care team could better assess the patient's condition and make timely treatment decisions.



During enrollment, the patient expressed concerns with using technology. The technician explained the enrollment process, answered questions, and reassured the patient that support would be available.



Later on, the patient experienced difficulty connecting the blood pressure device to the tablet. The technician promptly coordinated with the vendor, who resolved the issue the same day.



By proactively addressing patient concerns and facilitating technical support, the technician helped ensure successful enrollment and ongoing participation in the RPM program, keeping the patient engaged in care and connected to chronic disease management services.

Urgent Prior Auth Needed



At 5:00 PM, a provider contacted technician with an urgent request for a patient who had just been discharged from the hospital. The patient was in significant pain and needed oxycodone, but a prior authorization was required before the medication could be filled.



Because of the urgency, technician stayed after shift to complete the prior authorization. After spending about 20 minutes on the phone with Medicaid, prior auth was obtained.



Technician then called the patient's CVS Pharmacy and confirmed that the prescription would be ready for pickup within 10 minutes. After updating the provider, they were extremely grateful and relieved that the patient would be able to get their pain medication without any additional delays.



By taking quick action and working through the approval process, technician helped to ensure the patient received the medication they needed as soon as possible.

Complex Clinic Medication History



When the technician called the patient to complete a medication history, the patient was frustrated and overwhelmed by the number of medications being taken. The patient did not know the medications by name and was simply taking whatever was dispensed by the pharmacy.



Technician reviewed the medications with the patient and discussed what each one was for. During the conversation, we discovered that patient was still taking several medications that had already been discontinued.



Technician communicated findings to the ambulatory clinical pharmacist, who conducted a follow-up medication review. The pharmacist discontinued five medications that were no longer needed.



The patient was very thankful for the service. We improved medication safety, reduced unnecessary medication use, and increased the patient's understanding in managing their medications.

Supporting a Patient Through a Mental Health Crisis



A patient living with HIV had been successfully engaged in care for several years, but missed a scheduled LAI appointment. The technician began to coordinate rescheduling the appointment.



After reviewing the patient's chart, there was documented history of depression and feelings of hopelessness. Recognizing the potential seriousness of the situation, the technician alerted the pharmacist and social worker to ensure the patient received timely follow-up and support.



After multiple attempts, the care team connected with the patient and learned that they were experiencing a severe depressive episode. The patient had stopped taking their medications, disengaged from treatment, and expressed suicidal thoughts.



The pharmacy technician worked closely with the pharmacist, nursing team, and social worker to ensure the patient was connected to the appropriate mental health resources and received immediate support.

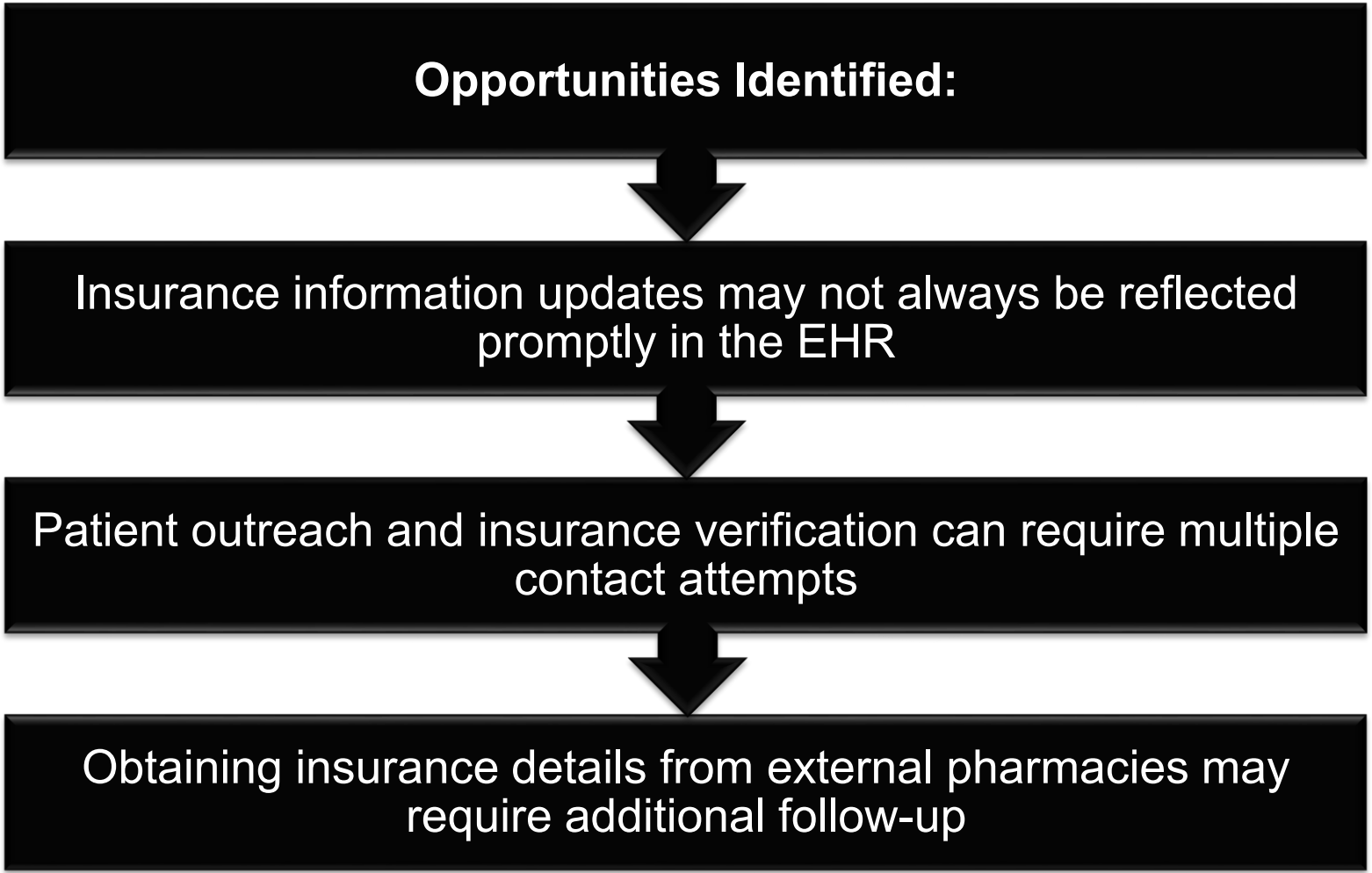


As a result, the patient remained connected to their care team and received the mental health services they needed. The patient re-engaged in care, resumed medications, attended follow-up appointments, and reported feeling supported during a difficult period in their life.

Objective 3: Challenges and Lessons Learned

Insurance and Access Opportunities

Opportunities Identified:



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graph TD; A[Opportunities Identified:] --> B[Insurance information updates may not always be reflected promptly in the EHR]; B --> C[Patient outreach and insurance verification can require multiple contact attempts]; C --> D[Obtaining insurance details from external pharmacies may require additional follow-up];
```

Insurance information updates may not always be reflected promptly in the EHR

Patient outreach and insurance verification can require multiple contact attempts

Obtaining insurance details from external pharmacies may require additional follow-up

Strategies Implemented:

- Used insurance websites such as **Availity, OptumRx, Healthfirst, and VNS** to check patients' insurance coverage and benefits
- Verified patients' insurance information through the electronic health record (EHR) system to make sure the most current information was being used

Workflow optimization

Opportunity:

Secure chats/separate messages for prior auth → leading to increased traffic in different in-basket folders

Action Taken:

Ongoing provider education to utilize the electronic prior auth request functionality

Drive traffic to the centralized PA queue and minimize redundant messages

Long-Acting Injectable Workflow Challenges

Potential
challenge:

- No-show and canceled appointments requiring manual intervention and rescheduling.

Future
Solution:

- Created unique appointment visit type to improve tracking and reduce oversight.

RPM Process Improvements

Challenge
identified:

- Limited visibility regarding outreach completed by different team members.

Improvement
Implemented:

- Smart phrases/templates → automatic color-coded system
- Shared tracking visibility between technicians and pharmacists

Objective 4: Future Goals and Strategic Roadmap

Electronic Medical Record (EMR) Optimizations

CURRENT STATE

- Excel spreadsheet used to track patients receiving LAIs
- Manual coordination of medication delivery to clinics
- Manual verification of medication receipt
- Time-consuming and prone to duplication/errors

FUTURE STATE (EMR)

- A dedicated dashboard for LAI management
- Provider orders automatically populate workflows
- Centralized documentation and status tracking
- Improved efficiency, visibility, and accuracy

Key Benefits: ✓ Reduced Manual Work ✓ Improved Visibility ✓ Standardized Process ✓ Enhanced Care Coordination

Engagement and Visibility

INTERNAL VISIBILITY

- Presenting ambulatory care pharmacy technician initiatives to leadership
- Increasing awareness of technician contributions to patient care and operational excellence
- Encouraging collaboration and knowledge sharing across disciplines

PROFESSIONAL DEVELOPMENT

- Building meaningful professional relationships and networks
- Creating opportunities for collaboration, mentorship, and career growth
- Promoting innovative ideas and best practices

2026 QUALITY CARE SYMPOSIUM

Poster Presentation

- ✓ Showcased ambulatory care pharmacy technician initiatives
- ✓ Highlighted workflow improvements and patient care impact
- ✓ Increased organizational visibility
- ✓ Expanded professional networking opportunities

Preceptorship and Involvement in Learners

4

Resident Orientation
Sessions (~60 Medical Residents
audience size)

5

Pharmacy Students Co-Precepted

Future

PGY-1 and 2 Pharmacy Residents

LEARNING EXPERIENCES PROVIDED

- Ambulatory Care APPE student training
- Exposure to medication access, prior authorizations, and care coordination
- Participation in medical resident orientation programs
- Future involvement in Pharmacy Resident education

TRAINING IMPACT

- ✓ Enhanced understanding of ambulatory care pharmacy services
- ✓ Exposure to innovative technician-led workflows
- ✓ Increased awareness of medication access and patient care coordination
- ✓ Strengthened readiness for future pharmacy practice

Future Direction

Performance Measurement

- Benchmark technician metrics
- Track outcomes across domains
- Identify workflow opportunities

Team Growth

- Continue expanding the team
- Align staffing with service demand
- Support additional clinics

Innovation & Technology

- Leverage EHR tools
- Reduce manual processes
- Improve visibility and reporting

Key Takeaways & Questions

Using pharmacy technicians for the right tasks improved workflow efficiency.

Technicians helped with many different responsibilities, making clinic operations run more smoothly.

Their support reduced workload for pharmacists, providers, and other care team members.

Technicians played an important role in helping patients get the care and support they needed.

Standardized technician workflows improved consistency and overall performance.

This approach can be easily expanded and sustained across ambulatory care settings.

The result was more efficient, high-quality, patient-centered care.

「Thank you