PHARMACY TECHNICIAN CERTIFICATION AND TRAINING TO PERFORM MEDICATION HISTORY COLLECTION
Objectives

At the conclusion of this activity, Pharmacists will be able to:

- List topics pharmacy technicians should be trained in to perform medication history collection
- Evaluate pharmacy technician competency in collecting medication history
- Identify the advanced credentials available to pharmacy technicians and understand the training required to obtain them.

Pharmacy technicians will be able to:

- Identify barriers to collecting a best possible medication history
- Describe how to collect a best possible medication history
- List the steps to becoming an Advanced Certified Pharmacy Technician (CPhT-Adv).
BACKGROUND
Medication reconciliation committee

- Goal of improving discharge medication reconciliation
- Upon review, many discharge discrepancies caused by inaccurate information entered on admission
  - Plan to improve admission medication history collection
- Literature search has shown that pharmacy staff collect more accurate medication histories
  - Trained pharmacy technicians perform as well as pharmacists

Johnston, 2010
Health Workforce Retraining Initiative Grant

- Goals
  - Pharmacy technician certification for uncertified technicians
  - Medication history collection training

- Hired
  - Pharmacist trainer
  - Technician backfill

- Purchased
  - Equipment (workstation on wheels)
  - Reference books
  - Study materials
  - Payment for test
Exclusions

- Some pharmacy technicians were excluded from medication history collection training (supervisor decision)
  - Language barrier
  - Specialized job function
  - Personality
Medication History Collection Training

- Preparation
- Patient Interview
- Emergency Department Layout/Finding Patients
- Computer System Training
  - separate pharmacy and EMR systems
- Didactic Classes on Dosage Forms and Nonformulary Products
- Review follow up questions
Preparation

- Review patient profile
  - Alert and oriented?
  - Arrived to ED alone or with someone?
    - HIPAA
- Review outpatient information
- Previous collection done by nurse or provider
- Review transfer sheets if arriving from outside facility
Patient interview

- Technicians may not be familiar with patient interview process
  - Simulation during training
- Greeting
- Open ended questions
- BPMH Check list
Greeting

- Introduction
  - Technician name
  - Title

- Purpose
  - Collect medication list
  - Ask questions about medications

- Is now a good time?
  - Especially if someone is with the patient

- Double identifier
  - Patient name
  - Date of birth
Examples of open ended questions

- Who takes care of your medications at home?
- What medications are you taking?
- What dose, strength, frequency?
- What do you take this medication for?
- When is the last time you took this medication?
- How do you take this medication?
Non-oral medications

- Eyedrops
- Nasal spray
- Topicals/patches
- Suppositories
- Eardrops
- Inhalers
- Nebulizers
- Injections
## BPMH checklist

<table>
<thead>
<tr>
<th>BPMH High-Performance Behaviors Checklist</th>
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<tbody>
<tr>
<td>Asks the patient open-ended questions about what medications she or he is taking (i.e., doesn’t reach the list and ask if it is correct)</td>
<td>□</td>
</tr>
<tr>
<td>Uses probing questions to elicit additional information: non-oral meds, non-daily meds, PRN medications, non-prescription meds, samples</td>
<td>□</td>
</tr>
<tr>
<td>Uses other probes to elicit additional medications common reasons for PRN meds, meds for problems in the problem list, meds prescribed by specialists</td>
<td>□</td>
</tr>
<tr>
<td>Asks about adherence</td>
<td>□</td>
</tr>
<tr>
<td>Uses at least two sources of medications, ideally one provided by the patient and one from another “objective” source (e.g., patient’s own list and ambulatory EMR medication list)</td>
<td>□</td>
</tr>
<tr>
<td>Knows when to stop getting additional sources (e.g., if patient has a list or pill bottles and seems completely reliable and data are not that dissimilar from the other sources, and/or the differences can be explained)</td>
<td>□</td>
</tr>
<tr>
<td>Knows when to get additional sources if available (e.g., if patient is not sure, relying on memory only cannot resolve discrepancies among the various sources of medication information)</td>
<td>□</td>
</tr>
<tr>
<td>When additional sources are needed, uses available sources first (e.g., pill bottles if present). Then obtains pharmacy data if the medication history is still not clear; obtains outpatient provider lists, pill bottles from home and/or other sources.</td>
<td>□</td>
</tr>
<tr>
<td>Uses resources like Lexicon to identify loose medications (i.e., for a bag of medications, not in their bottles, provided by a patient)</td>
<td>□</td>
</tr>
<tr>
<td>Returns to patient to review new information, resolve all remaining discrepancies</td>
<td>□</td>
</tr>
<tr>
<td>Gets help from other team members when needed</td>
<td>□</td>
</tr>
<tr>
<td>Educates the patient and/or caregiver of the importance of carrying an accurate and up to date medication list with them</td>
<td>□</td>
</tr>
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</table>

https://www.hospitalmedicine.org/clinical-topics/medication-reconciliation/
Which of the following is a correct step to take when collecting a BPMH?

A. Use open ended questions
B. Use at least 2 sources of information
C. Ask about non-oral, non-daily, and non-prescription medications
D. Return to the patient to clarify and resolve discrepancies
E. All of the above
Assessment question

Which of the following is a correct step to take when collecting a BPMH?

A. Use open ended questions
B. Use at least 2 sources of information
C. Ask about non-oral, non-daily, and non-prescription medications
D. Return to the patient to clarify and resolve discrepancies
E. All of the above
Examples of barriers to collecting a BPMH

- Language
- Dementia/Altered mental status
- Illness
- Patient unfamiliar with medications
  - Patient does not have a medication list
- Patient upset/refusing
  - History already collected by other staff
- Patient not available
  - Transfer
  - Tests
  - Seen by other staff
- Computer systems do not communicate
- Outpatient providers have inaccurate lists
- Lack of time

Johnson, 2015
Which of the following is NOT a barrier to collecting a BPMH?

A. Lack of time
B. Cost of medications
C. Dementia
D. Computer system do not communicate
E. Outpatient providers have inaccurate lists
Assessment question

Which of the following is NOT a barrier to collecting a BPMH?

A. Lack of time

B. Cost of medications

C. Dementia

D. Computer system do not communicate

E. Outpatient providers have inaccurate lists
Emergency department orientation

- General layout
  - Waiting room/ triage
  - Beds
  - Stretchers
  - Chairs
  - Isolation rooms
- Pharmacy area/ work space
- Contact precautions
- Hand hygiene
Computer system training

- Navigation
- ED tracking board/patient list
- Outpatient information
- Outpatient pharmacy/provider contact information
  - Call pharmacy or doctor’s office for more information
- Medication history documentation
- Update default pharmacy
- Tips and tricks
  - Duoneb → ipratropium/albuterol
Medication education

- Nonformulary/outpatient medications
  - Inhalers
  - Insulins
  - Noninsulin injectables
  - Oral diabetic medications
  - Combination products
- Dosage forms (extended/immediate release)
Examples of follow up questions

- Rescue inhalers if on maintenance inhalers
- Vitamin D if on calcium
- Not taking medication: prescriber aware or stopped by self
- Indication for as needed medication
- Topical medication application site
- Date started/day of therapy for short term medications
  - Antibiotics
  - Steroid taper
- Specific location of pharmacy (town/street)
Hands on in the emergency room

- Pharmacist hired by grant
- Backfill technicians while training technician was in the ED
- A week with pharmacist supervision
- Competency review at the end of the week
Competency Form

COMPETENCY EVALUATION

Employee Name: ___________________________  ID#: ___________________________

Position: Pharmacy Technician  Department: Pharmacy

Initial __  Ongoing __  Home Medication Collection

The above staff member must be able to demonstrate the knowledge and skills necessary to perform their job to comply with CMS meaningful use. The skills and knowledge needed to perform such job must be assessed through education, training or experience.

Validation Codes:  (Note: 1, 2, 3, 4)
1. Direct observation
2. Test
3. Review of Records
4. Return Demonstration

<table>
<thead>
<tr>
<th>Task</th>
<th>Validation</th>
<th>Employee’s Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can select and prioritize patients based on updated training</td>
<td>1, 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can perform proper hand hygiene before and after seeing a patient</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can greet patients in the Emergency Department in a professional and welcoming manner</td>
<td>1, 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect a complete and accurate list of patient’s medications: OTC, herbal products and supplements</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain additional medication information from outside sources when necessary (including Pharmacies, Retail and mail-order, MD offices, extended care facilities or other care takers)</td>
<td>1, 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set default pharmacy in Soarian Clinicals for patients needing this service</td>
<td>1, 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicate with other healthcare professionals to maintain adequate workflow and identify patient specific needs for language barriers</td>
<td>1, 4</td>
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</tr>
<tr>
<td>Completes bi-weekly privacy policies</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can initiate Soarian Clinicals</td>
<td>1, 4</td>
<td></td>
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</tr>
<tr>
<td>Can accurately enter the medication list into hospital information system in a timely manner</td>
<td>1, 4</td>
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</tr>
<tr>
<td>Direct any unresolved issues and discrepancies to the Pharmacist</td>
<td>1, 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required SADA training has been completed</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
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Employee Signature: ___________________________  Date: ___________________________
Which of the following is NOT a topic pharmacy technicians should be trained in to work in the emergency department and collect medication history?

A. Emergency department layout
B. Patient interview process/BPMH
C. Pharmacokinetics
D. Outpatient medications
E. Computer system
Which of the following is NOT a topic pharmacy technicians should be trained in to work in the emergency department and collect medication history?

A. Emergency department layout
B. Patient interview process/BPMH
C. Pharmacokinetics
D. Outpatient medications
E. Computer system


Pharmacy Technician Credentials

Ryan Burke, PharmD
Director, Professional Affairs
Pharmacy Technician Certification Board

New York State Council of Health-System Pharmacists
November 5, 2019
Disclosures

Ryan Burke is employed by the Pharmacy Technician Certification Board. He declares no other conflicts of interest, real or apparent, and no other financial interests in any company, product, or service mentioned in this program, including grants, employment, gifts, stock holdings, and honoraria.
Learning Objectives

Pharmacists

✔ Identify the advanced credentials available to pharmacy technicians and understand the training required to obtain them.

Pharmacy Technicians

✔ List the steps to becoming an Advanced Certified Pharmacy Technician (CPhT-Adv).
Mission and Vision

Mission: PTCB advances medication safety by credentialing technicians who are qualified to support pharmacists and patient care teams in all practice settings.

Vision: PTCB sets the standard for credentialing of technicians that improves medication safety and patient care.
Recent & Upcoming Changes
Education/Training Requirement

CPhT Eligibility Pathways

Completion of a PTCB-recognized education/training program

Equivalent work experience (i.e., 500 hours)

Required knowledge is the same for both paths.
PTCE will contain only the most important content relevant to both major areas of practice.
Assessment-Based Certificate Programs

- Technician Product Verification (Tech-Check-Tech)
- Medication History
- Hazardous Drug Management
- Billing and Reimbursement
- Controlled Substance Diversion Prevention

Eligibility Criteria: Be an active PTCB CPhT and complete a PTCB-recognized education/training program. Some programs will also include an alternative eligibility pathway.
Medication History Certificate Program
Scope of the Program

PTCB Medication History certificate holders have demonstrated the necessary training, experience, and knowledge to be entrusted to collect an accurate medication history from patients in any health-care setting.
Medication History Program

Eligibility Pathways

Completion of a PTCB-recognized program + 6 months of experience*

One year of experience*

*Approximately 50% of time spent in work activities should involve patient-focused communication (e.g., intake of new patients/prescriptions, answering patient questions). The intention of the requirement is that pharmacy technicians with full-time work experience in community pharmacies and/or work experience in ambulatory/hospital roles focused on taking medication histories will meet the spirit of the requirement.
Medication History Exam Content Outline
Concepts/Terminology of Medication History (45%)

- Definitions of key terms in the medication history process (e.g., medication allergy vs. medication intolerance, medication adherence)
- Translation between patient-friendly terms and medical terminology
- Adherence metrics and differences between primary and secondary nonadherence
- Common vaccinations and vaccination schedules
### Medication History Exam Content Outline

**Patient Safety & Quality Assurance Strategies (55%)**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
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<tbody>
<tr>
<td>Types of prescription/medication errors</td>
<td>(e.g., abnormal doses, incorrect quantity, incorrect strength, incorrect drug, incorrect route of administration, incorrect directions, wrong timing, missing dose, misinterpretation of drug concentration)</td>
</tr>
<tr>
<td>Potential impact of medication errors</td>
<td>Including look-alike/sound-alike medications (e.g., ampicillin/amoxicillin)</td>
</tr>
<tr>
<td>Patient factors that influence the ability to report medication information accurately and adhere to prescribed dosing schedules</td>
<td></td>
</tr>
<tr>
<td>HIPAA and best practices to maintain patient confidentiality during patient conversations</td>
<td></td>
</tr>
<tr>
<td>Techniques or devices to assist with safe and consistent home medication use (e.g., pill boxes, medication calendars, medication alarms)</td>
<td></td>
</tr>
<tr>
<td>Procedures to verify patient identity, including appropriate identifiers and knowledge of limitations for different identifiers</td>
<td></td>
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Medication History Exam

✔ Computer-based exam with 79 multiple-choice questions
✔ 2 hours (10-minute tutorial and survey, 1 hour and 50 minute exam)

A note about scoring: Because the Medication History Assessment-Based Certificate Program is new, scoring will be delayed by 3-4 months. PTCB will apply the same rigorous process to determine the passing score for the Medication History Exam after multiple candidates have tested.
Digital Badges

- Certified Pharmacy Technician
- Certified Compounded Sterile Preparation Technician
- Medication History
- Technician Product Verification
Advanced Certified Pharmacy Technician

Be an active PTCB CPhT + Successfully complete at least 4 certificate programs* + Have at least 3 years of work experience in the last 8 years

*One must be either TPV or Medication History

Individuals who earn the CPhT-Adv credential will be required to earn additional CE hours to maintain their certification.
Self-Assessment Question

Which topic will not be included in the initial release of PTCB’s Assessment-Based Certificate Programs?

A. Technician Product Verification
B. Medication History
C. Immunization Delivery
D. Controlled Substance Diversion Prevention
E. Hazardous Drug Management
Self-Assessment Question

Which topic will not be included in the initial release of PTCB’s Assessment-Based Certificate Programs?

A. Technician Product Verification
B. Medication History
C. Immunization Delivery
D. Controlled Substance Diversion Prevention
E. Hazardous Drug Management
Self-Assessment Question

How many years of work experience must a certified pharmacy technician have in order to be eligible to earn the Advanced Certified Pharmacy Technician Credential (CPhT-Adv)?

A. 2 years
B. 3 years
C. 4 years
D. 5 years
E. 6 years
Self-Assessment Question

How many years of work experience must a certified pharmacy technician have in order to be eligible to earn the Advanced Certified Pharmacy Technician Credential (CPhT-Adv)?

A. 2 years
B. 3 years
C. 4 years
D. 5 years
E. 6 years
Thank you!

Questions?

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