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Owner Siobhan De Urioste
Policy Area SMH Pharmacy Standard Operating Procedures
Applicability University of Rochester - Strong Memorial Hospital

SMHSOP15A Medication History Technician Competency and Credentialing

PURPOSE

The purpose of the medication history technician program is to provide a high-quality, efficient, and standardized approach to completing inpatient medication histories for patients admitted to Strong Memorial Hospital.

SCOPE

The medication history technicians will provide their services to patients recently admitted to Strong Memorial Hospital with pharmacist oversight.

EXCEPTIONS

Pharmacy technicians are credentialed through the competency program below. Only technicians completing the competency program are credentialed to obtain medication histories for hospitalized patients at Strong Memorial Hospital. All other technicians and practice sites are not covered by this competency and credentialing program.

DEFINITIONS

PTA:	prior to admission
BPML:	best possible medication list

TOC:	Transitions of care
PTU:	Pharmacy Technician University
MARQUIS:	Multi-Center Medication Reconciliation Quality Improvement Study

PROCEDURE

All pharmacy technicians hired to be a medication history technician specialist will perform, at a minimum, the following training prior to obtaining a medication history without a pharmacist in the room. Training may be individualized and extended if needed and does not need to be done in any particular order unless noted.

The medication history technician is responsible for printing out the table below and after orienting/training in a particular area, having the trainer initial the area in which they trained. At the end of training, the signed document should be given to the technician's direct supervisor. The supervisor will scan, file, and forward the document to the Pharmacy Department Administrator and Associate Director of Pharmacy, Clinical Services.

Title	Progress	Sign-off as completed
eRecord Training (technician to self-initial when completed)		
MyPath Training and mandatories (technician to self-initial when completed)		
Strong Memorial Hospital PTU course completion and certification or current certification and the following: <ul style="list-style-type: none"> • Orient to Inpatient Main Distribution • Orient to Inpatient Pharmacy IVA Prepack-Standards • Orient to Pharmacy Robot • Orient to Inpatient Pharmacy Oral Batch • Orient to Inpatient Pharmacy Cart Fill (including familiarity with all unit locations) • Orient to Emergency Department • Orient to Outpatient Pharmacy including Discharge Program 		
Review High Risk Medications as contained in policy 8.7 High Risk Medications (technician to self-initial when completed)		
Review and demonstrate proper infection precautions as outlined in hospital policy: General Policies for Isolation Precautions (Transmission Based Precautions) (technician to self-initial when completed)		
Become familiar with the Multi-Center Medication Reconciliation Quality Improvement Study (MARQUIS) from the Society of Hospital Medicine by reviewing the material below:		

<ul style="list-style-type: none"> Independently watch MARQUIS Training video "Taking a Good Medication History Video" Guide for Best Possible Medication History Quick tips MARQUIS 2 Pocket guide <p>(technician to self-initial when completed)</p>		
<p>Independently review PowerPoint presentation: Taking a "Best Possible Medication History" One of the most important things you can do to keep patients safe by Jeffrey L. Schnipper, MD, MPH, FHM Taking a BPMH presentation (technician to self-initial when completed)</p>		
<p>Review Standard Operating Procedure: SMHSOP15B, Medication History Technician Workflow and How to Obtain the Best Possible Medication List at Strong Memorial Hospital (technician to self-initial when completed)</p>		
<p>Independently review "Access to Care: Development of a Medication Access Framework for Quality Measurement" from PQA in March 2019 PQA Medication Access article (technician to self-initial when completed)</p>		
<p>Train with medication history technicians:</p>		
<ul style="list-style-type: none"> Patients to review must include: Patients from skilled nursing facility Patients presenting from home Patients in need of Cyracom and Spanish or ASL interpreter services 		
<ul style="list-style-type: none"> Observe a minimum of 5 patient interviews by a trained medication history technician 		
<ul style="list-style-type: none"> Submit a minimum of 10 patient medication history reviews with the oversight of a trained medication history technician for a pharmacist to review and provide direct feedback on 		
<p>Written competency assessment (must achieve > 80% to pass) Written Competency</p>		
<p>Independently and accurately complete 5 medication history reviews</p> <ul style="list-style-type: none"> Patient Interview Checklist will be used to assess and immediate feedback will be provided (must pass all 5) <p>Med History Technician Assessment</p>		

- Note: "Orient" suggest that a technician has a general understanding of how the area works, not that a technician is proficient in working/staffing that area.

Upon completion of all of these steps, a pharmacy technician will be considered credentialed to collect medication histories from patients. Continued competence will be assessed by directly observing at least 2 medication histories annually, or if concern over performance arises.

ADDITIONAL RESOURCES

1. High-Risk Medications in policy [8.7 High Risk Medications](#)
2. Isolation precautions in policy: [General Policies for Isolation Precautions \(Transmission Based Precautions\)](#)
3. Multi-Center Medication Reconciliation Quality Improvement Study (MARQUIS) from the Society of Hospital Medicine
 - a. Pocket guide for Best Possible Medication History Quick tips (SEE LINK BELOW) [MARQUIS 2 Pocket guide](#)
 - b. MARQUIS Training video "[Taking a Good Medication History Video](#)"
4. PolicyStat: [SMHSOP15B, Medication History Technician Workflow and How to Obtain the Best Possible Medication List at Strong Memorial Hospital](#)
5. PowerPoint presentation: Taking a "Best Possible Medication History" One of the most important things you can do to keep patients safe by Jeffrey L. Schnipper, MD, MPH, FHM (link in lb) [Taking a BPMH presentation](#)
6. PQA March 2019 article "Access to Care: Development of a Medication Access Framework for Quality Measurement" [PQA Medication Access article](#)
7. Policy [11.05.1 Interpreters: Spoken Languages Other than English](#)

Attachments

[📎 Medication History Technician Assessment.docx](#)

[📎 Medication History Technician Written Competency.docx](#)

Approval Signatures

Step Description	Approver	Date
Pharmacy Administrator	Travis Dick	2/29/2024
Policy Owner	Siobhan De Urioste	2/29/2024

Applicability

University of Rochester - Strong Memorial Hospital

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