



**STAY ENGAGED. STAY INFORMED.**

**222**

**TUESDAY, JUNE 13, 2017:**

**ADVANCING THE ROLE OF  
PHARMACY TECHNICIANS**

# WELCOME



Anthony Pudlo, PharmD, MBA, BCACP

Vice President of Professional Affairs

Iowa Pharmacy Association

# PRESENTER



Miriam A. Mobley Smith, BS  
Pharm, PharmD, FASHP  
Director of Strategic Alliances Pharmacy  
Technician Certification Board



---

# ADVANCING THE ROLE OF PHARMACY TECHNICIANS: PHARMACY TECHNICIAN STAKEHOLDER CONSENSUS CONFERENCE

Iowa Pharmacy Association Webinar  
June 13, 2017

**Presenters:**

Miriam A. Mobley Smith,  
PharmD, FASHP

**Setting the Standard.  
Advancing Patient Care.**

# AGENDA

- Introduction
- The Conference
- Consensus Recommendations
- Moving Forward



# INTRODUCTION

“The time has come to identify realistic and achievable pathways for [pharmacy] technicians that support medication safety and protect our patients.”

-Everett B. McAllister, CEO and Executive Director, PTCB

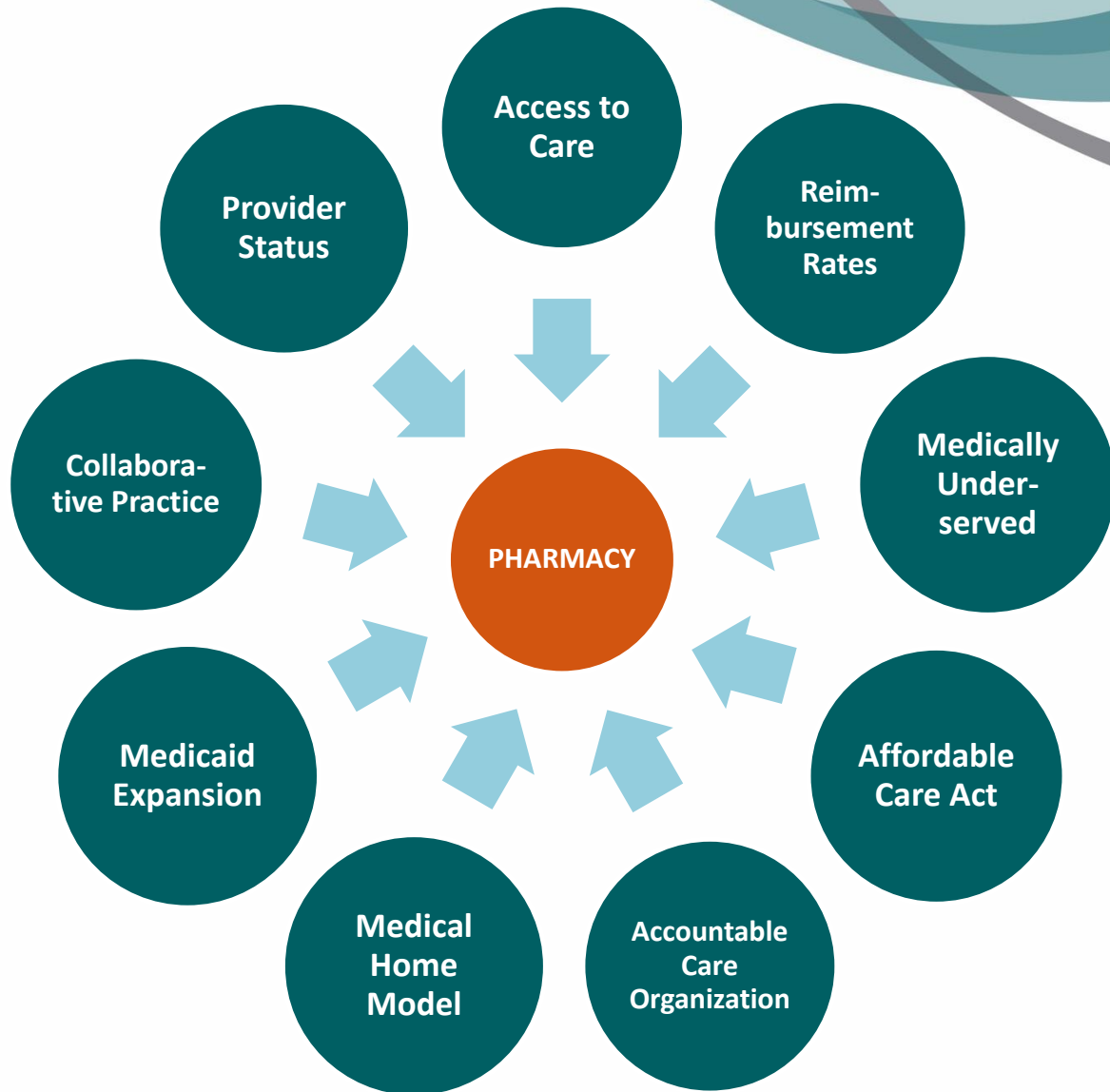
# HISTORY OF CONSENSUS

- 1988 Technician Personnel in Pharmacy Conference
  - Conducted by the University of Maryland Center on Drugs and Public Policy, sponsored by the ASHP Research and Education Foundation
  - 70 pharmacists and technicians from various settings
- 2002 Sesquicentennial Stepping Stone Summit
  - Convened by CCP, NACDS, and NCPA
  - 34 experts and stakeholders
- 2011 C.R.E.S.T. Summit
  - Survey with 12,000 respondents + conference
- 2015 PTCB Stakeholder Conference

# WHY NOW?

The pharmacy profession is under pressure to change.

- Access
- Affordable Care Act
- Mergers
- Collaborations
- Reimbursements
- Star Ratings





# INCREASING AND ADVANCING ROLES

“Increased demand for prescription medications and interprofessional team-based care will lead to **more demand for pharmacy services and advanced roles for pharmacists and technicians.**”

“Advanced roles require **moving technicians from unskilled labor to certification** for protection of patient safety. “

*Pharmacy Times*

<http://www.pharmacytimes.com>

# EMERGING ROLES FOR TECHS

Medication reconciliation

Medication therapy management

Immunization

Indigent care prescription programs

## **Sterile & non-sterile compounding**

Clinical technicians (e.g., chronic care, appt. scheduling, medication adherence, smoking cessation, vital signs measurements, data management, etc.)

## **Tech-check-tech**

Point of Care Testing

Education

Prescription clarification

Quality assurance and quality improvement initiatives

CMS-CMMI Grant Projects (Innovations Center)

## **Community outreach programs**

DUE/ADR monitoring

Informatics

Medication safety initiatives

Telepharmacy

Refill counseling screening

Board of Pharmacy

# PHARMACIST PROFESSION ENTRY

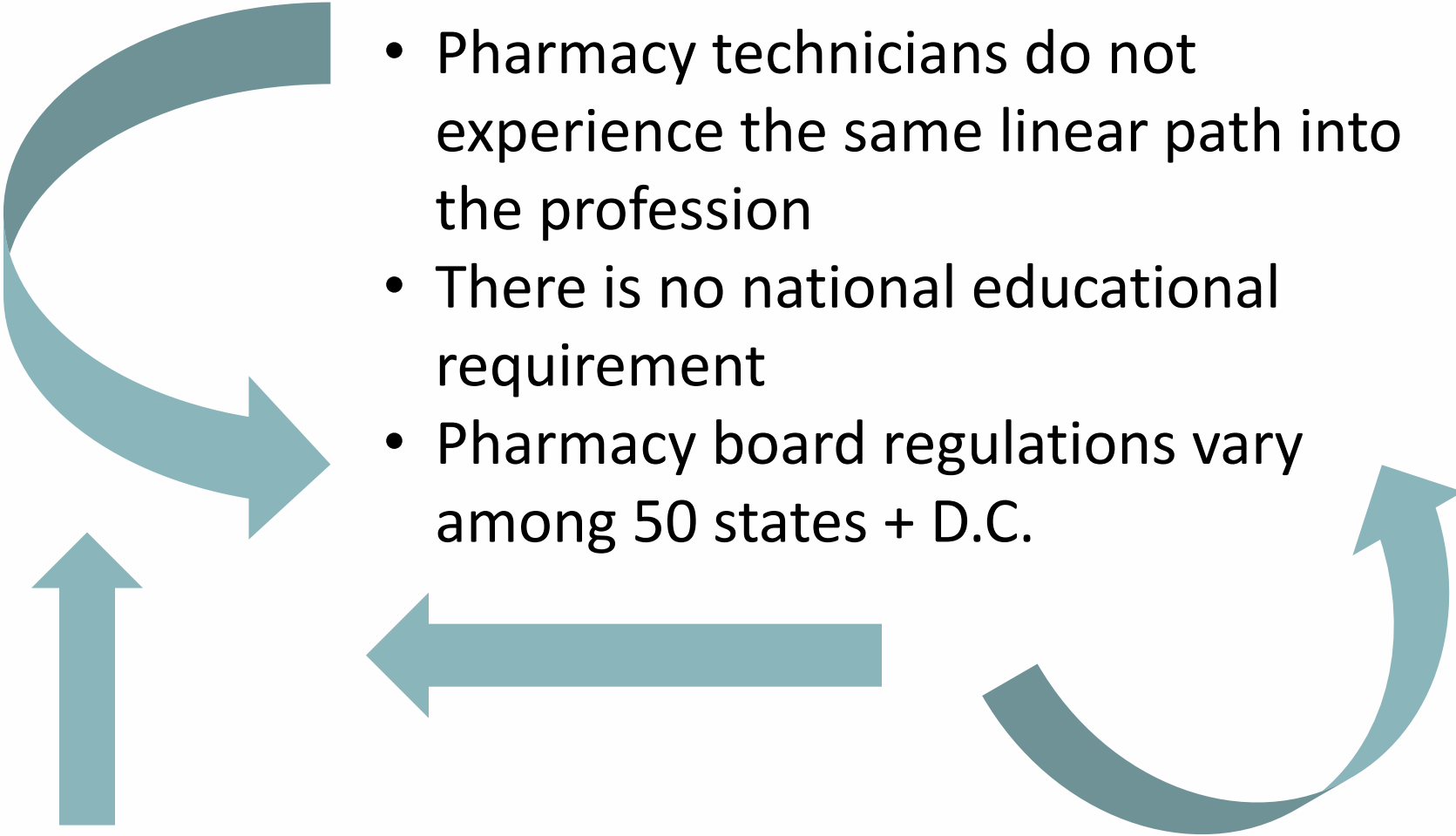
**ACPE  
Accredited  
Pharmacy  
School**

**North  
American  
Pharmacist  
Licensure  
Exam  
(NAPLEX)**

**Multistate  
Pharmacy  
Jurisprudence  
Exam (MPJE)**

**State Board  
Requirements**

# PHARMACY TECHNICIAN ENTRY

- 
- Pharmacy technicians do not experience the same linear path into the profession
  - There is no national educational requirement
  - Pharmacy board regulations vary among 50 states + D.C.

# TECH WORK REQUISITES

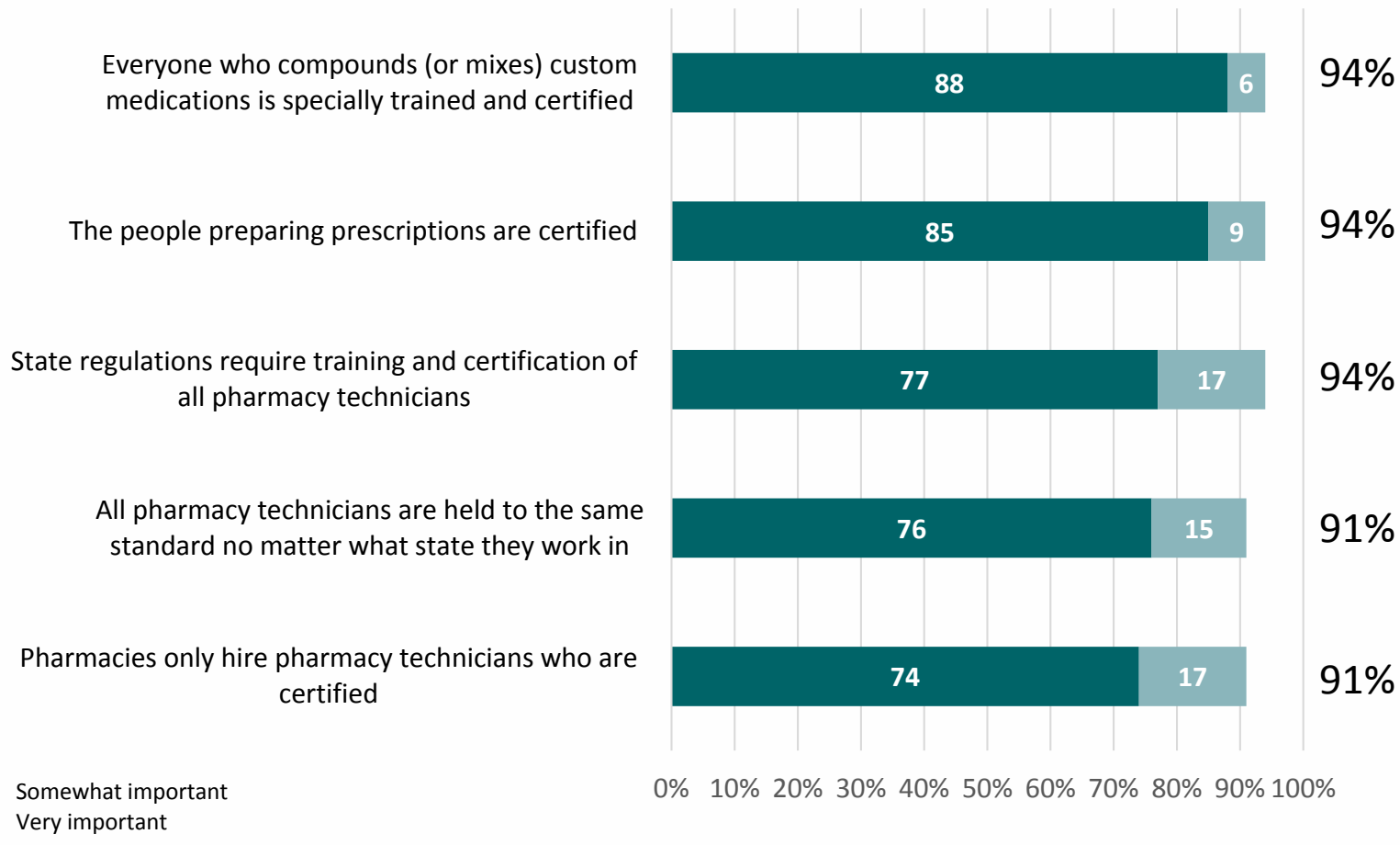
**There are no national uniform standards for employment, education, or regulations.**

Requirements may include:

- Formal pharmacy technician education
- Prior experience
- National certification (Certified Technician, CPhT)
- State registration
- Continuing education; competency assessments

# What Does the Public Think?

In a recent survey, the public was asked about the importance of certification and training for pharmacy technicians:



# What Does the Public Want?



$\frac{3}{4}$

Three quarters of consumers say that they would seek out a pharmacy where the pharmacy technicians were certified.

Frequent visitors are more likely to seek out a different pharmacy, and adults with children at home are even more likely to say they'd look elsewhere.

# THE CONFERENCE

“We all have a responsibility to our patients to get this right.”

-Larry Wagenknecht, Chair of the PTCB Board of Governors,  
and CEO of the Michigan Pharmacists Association





**PHARMACY TECHNICIAN**

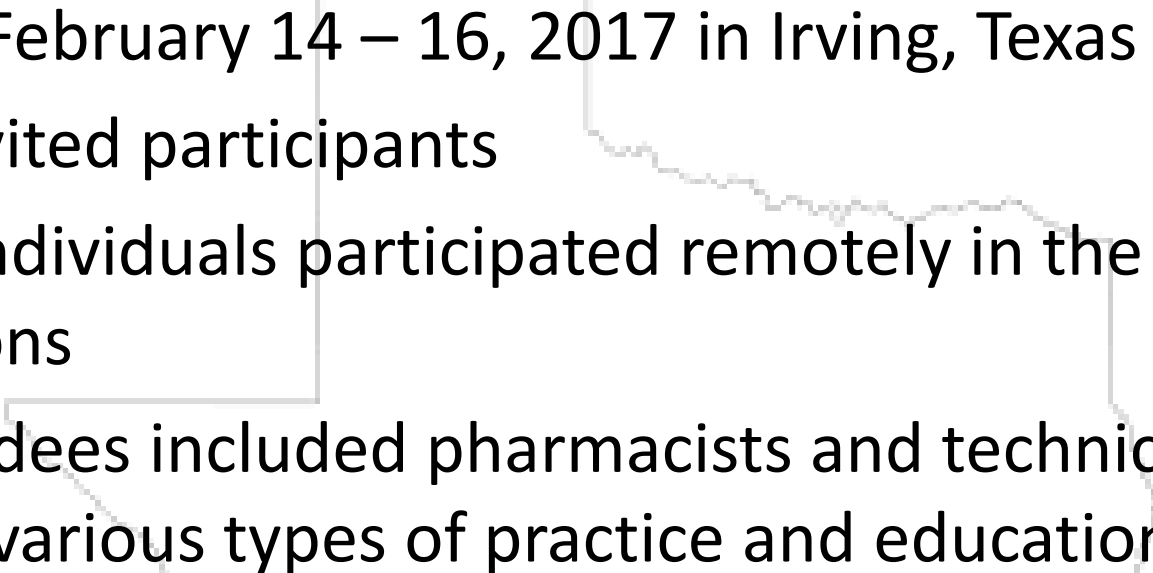
# Stakeholder Consensus Conference

# CONFERENCE OBJECTIVES

The aim of the conference was to explore consensus on:

1. The necessity of public confidence in pharmacy's process for ensuring the competency of pharmacy technicians.
2. An optimal level of basic ("generalist") knowledge, skills, and abilities that pharmacy technicians should have regardless of practice site.
3. An optimal definition of entry--level ("generalist") pharmacy technician practice with respect to (a) legally recognized scope of practice; (b) educational requirements; (c) training requirements; (d) certification requirements; and (e) state board of pharmacy registration or licensure.
4. The desirability and feasibility of developing a process for recognizing competencies of pharmacy technicians beyond entry--level practice.
5. The desirability and feasibility of minimizing variability among the states in the definition and regulation of pharmacy technicians.
6. The entities that potentially could take responsibility for any changes in pharmacy's process for ensuring the competency of pharmacy technicians.

# ABOUT THE CONFERENCE

- Held February 14 – 16, 2017 in Irving, Texas
  - 89 invited participants
  - 350 individuals participated remotely in the plenary sessions
  - Attendees included pharmacists and technicians from various types of practice and education settings
- 

# A COLLABORATIVE EFFORT

- Sponsored by the Pharmacy Technician Certification Board
- Planned in collaboration with the
  - Accreditation Council for Pharmacy Education (ACPE)
  - American Society of Health-System Pharmacists



# A COLLABORATIVE EFFORT

## Advisory committee representing all major branches of pharmacy

- **Jason Ausili, PharmD**  
Director, Pharmacy Affairs  
National Association of Chain Drug Stores
- **Malcolm Broussard**  
Executive Director  
Louisiana Board of Pharmacy
- **Al Carter, PharmD, MS**  
Senior Director, Pharmacy Regulatory  
Affairs  
CVS Health
- **Charles E. Daniels, BS Pharm, PhD**  
Pharmacist-In-Chief & Associate Dean  
University of California San Diego
- **Kenneth Mark Ey, RPh**  
Vice President of Operations  
CARE Pharmacies Cooperative Inc.
- **Diane Halvorson, RPhTech, CPhT**  
Lead Pharmacy Technician  
Vibra Hospital Fargo  
Pharmacy Technician Member, North  
Dakota  
State Board of Pharmacy
- **Timothy R. Koch, RPh, PD, CHC**  
Sr. Director, Pharmacy Practice Compliance  
Walmart Corporate Office
- **Janet M. Liles, MS, CPhT**  
Executive Director  
Pharmacy Technician Educators Council
- **Scott A. Meyers, RPh, MS, FASHP**  
Executive Vice President  
Illinois Council of Health System Pharmacists
- **Matt Osterhaus, BSPH**  
Co-Owner  
Osterhaus Pharmacy
- **Jon Roth, CAE**  
Chief Executive Officer  
California Pharmacists Association
- **Steve Rough, MS, RPh, FASHP**  
Director of Pharmacy  
Univ of Wisconsin, Madison School of  
Pharmacy
- **Rafael Saenz, PharmD, MS, FASHP**  
Administrator, Pharmacy Services, University  
of Virginia Health System  
Assistant Dean, VCU School of Pharmacy -  
UVA Division

# PRE-CONFERENCE SURVEY

A pre-conference survey was sent to pharmacy leaders and conference participants, results broken out by setting.

Example survey question:

<i>The profession of pharmacy has an obligation to make certain that pharmacy technicians are <b>educated and trained</b> in a manner that ensures public safety.</i>		% Agree + Strongly Agree	% Disagree + Strongly Disagree
	Independent	98	2
	Chain	95	5
	Hospital	100	0
	Education	99	1
	Regulatory	97	3
	Association	100	0





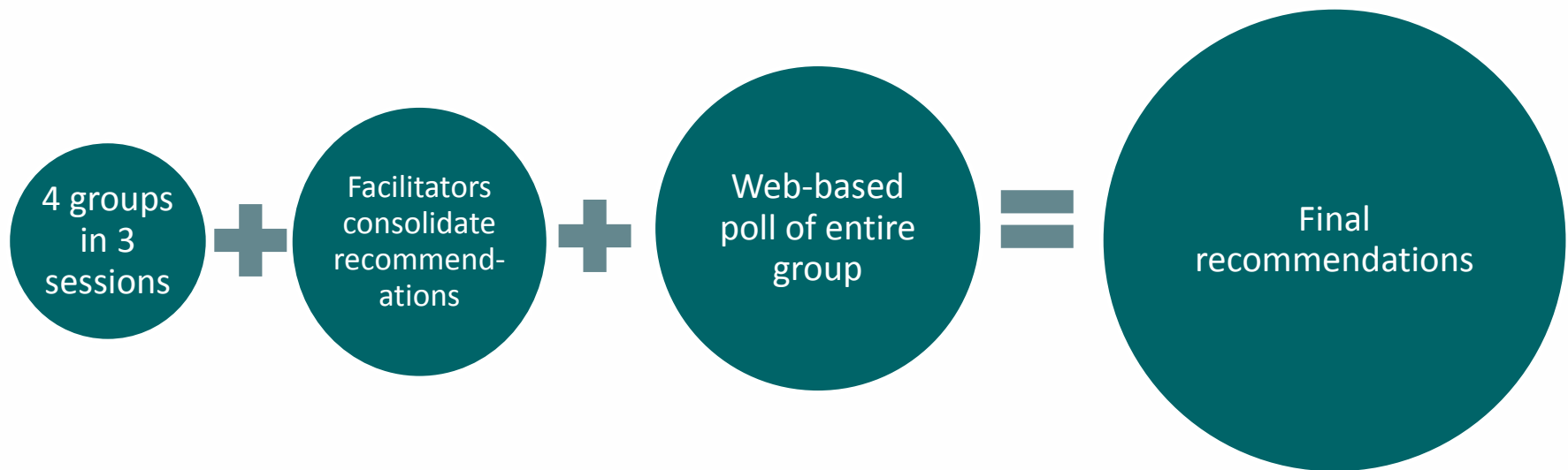
# SAMPLE OF SESSIONS

- Snapshots of the Pharmacy Technician Work Force
- Optimal Requirements for Entry-level Practice
- Advanced Pharmacy Technician Practice
- Models for Moving Forward





# RECOMMENDATIONS PROCESS



# CONSENSUS RECOMMENDATIONS

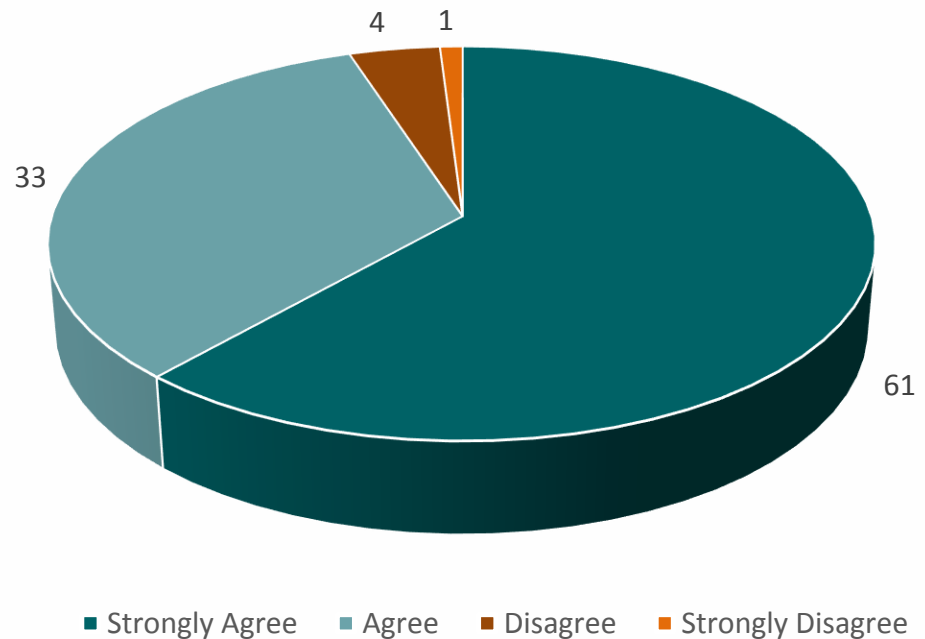
“We must respond to the expectations of the public and align on how to meet them.”

- Michael A. Moné, Vice President and Associate General Counsel for Cardinal Health

# DEFINING PHARMACY TECHNICIANS

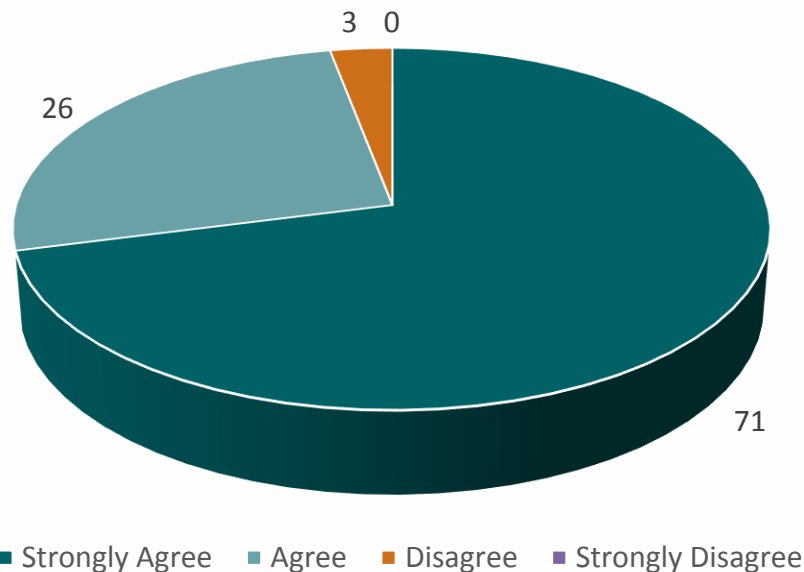
Most agreed with the need to create a legal definition of pharmacy technicians.

- Occupational title used by only those who have met specified qualifications.



- Greater support for an inclusive **all-settings assessment as the basis for national standards** versus separate assessments for different sectors of practice.

# EDUCATION OF PHARMACY TECHNICIANS

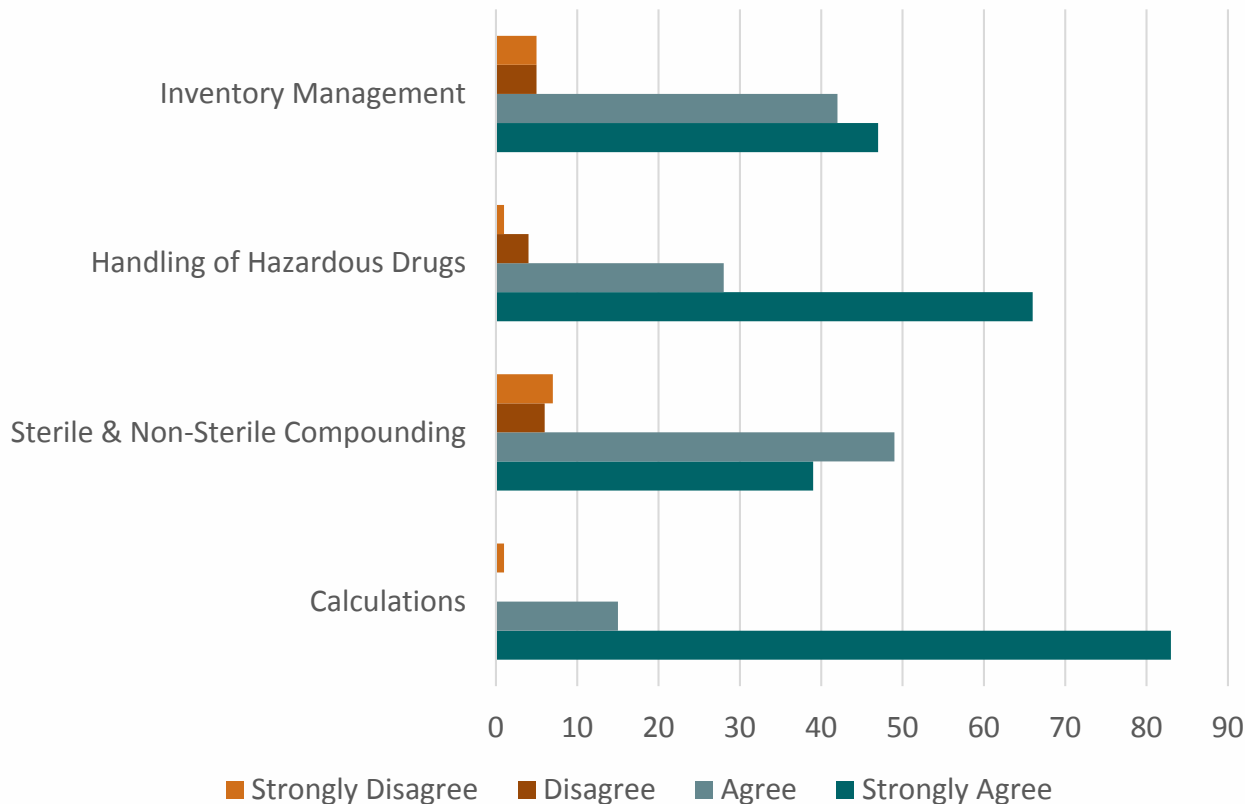


Most conferees **agreed that national standards** should guide technician education, and that technician education **programs should be accredited.**

- There was further agreement that the national standards should **focus on the outcomes** of education, allowing flexibility in how those outcomes are achieved.

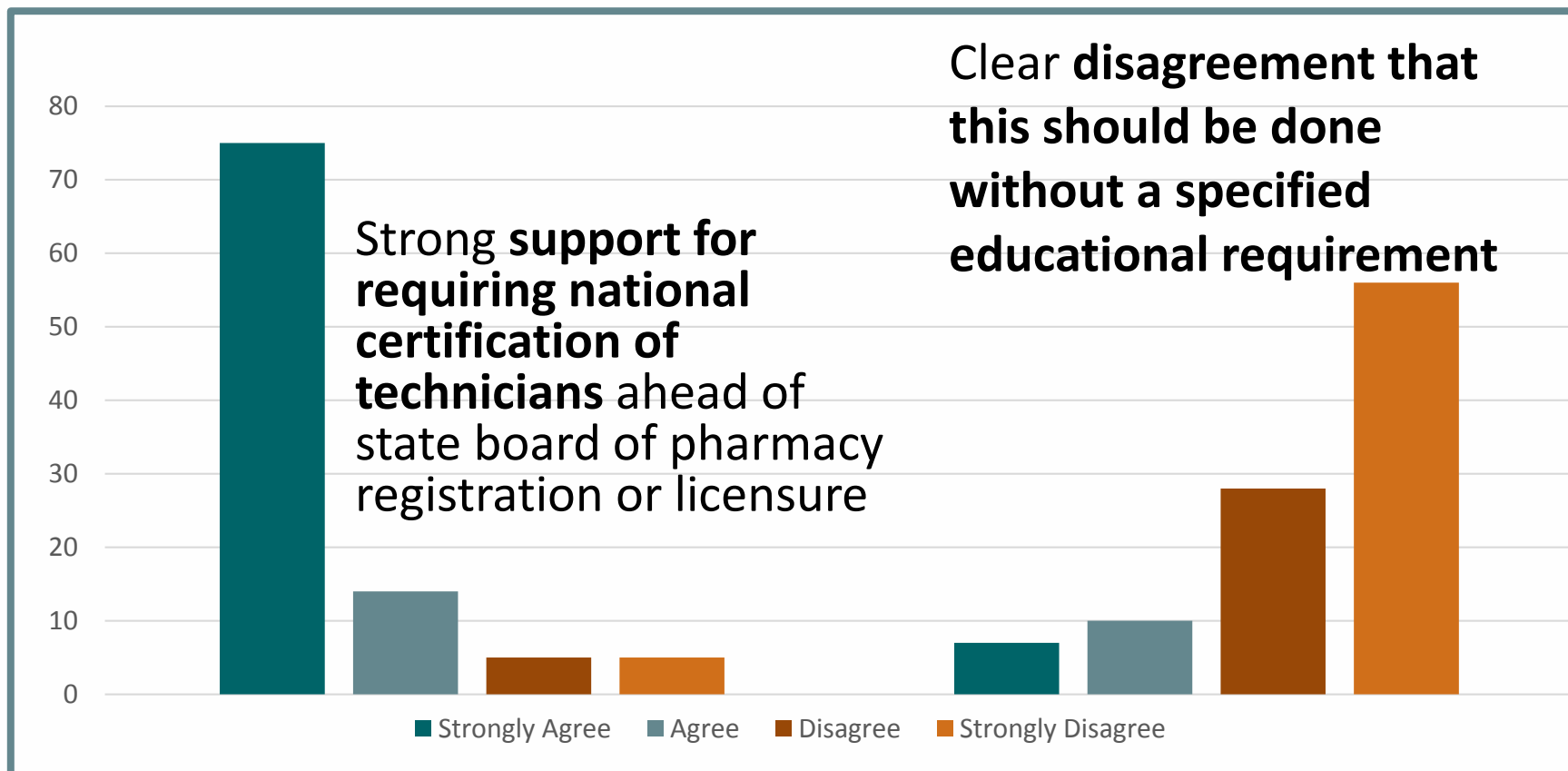
# ENTRY-LEVEL KNOWLEDGE, SKILLS AND ABILITIES

- **Agreement on all of the 18 areas polled** regarding entry-level practice.



One-third of conferees **disagreed with two areas**— “demonstrate understanding of nontraditional roles” and “billing”.

# CERTIFICATION OF PHARMACY TECHNICIANS



- **Support for maintenance of national certification** as a requirement for continued registration or licensure

# STATE LAWS AND REGULATIONS ON PHARMACY TECHNICIANS

- Nearly all conferees agreed that **variability should be minimized in state regulations** regarding technicians
- Nearly all conferees agreed that **technician practice should be under the purview of the pharmacist**
- Most conferees agreed that **national standards should not prevent states from innovating and expanding technicians' scope** of practice beyond established entry-level standards

# ADVANCED PHARMACY TECHNICIAN PRACTICE

General agreement that pharmacy's immediate priority for technicians, should be:

- **development of standards** related to entry--level practice
- **advanced roles for technicians** (and related education and credentials) will evolve over time



# MOVING FORWARD ON PHARMACY TECHNICIAN ISSUES


- Unanimous agreement that the conference planners should **establish a coalition of stakeholders to pursue the consensus recommendations** from the conference
- Most conferees agreed that participants in this stakeholder event have a **responsibility to work toward achieving the consensus recommendations**

# MOVING FORWARD

“We found ourselves rallying around a common mission and reachable goals, while balancing the unique needs of each sector of the profession.”

- Matthew Osterhaus, Owner/Pharmacist,  
Osterhaus Pharmacy

# THE ROAD AHEAD

- Further presentations & discussions at various pharmacy meetings
  - Publish proceedings
    - AJHP online mid-June
    - AJHP print September
    - AJHP September: Opening/keynote remarks by Michael Moné
    - JAPhA online, date TBD
- 

# HOW WE'LL WORK TOGETHER

- We are all accountable.
- An unyielding focus on patient safety and outcomes.
- We move forward as a profession.
- Build on agreement.



# FOR SUCCESS THE PROFESSION NEEDS SIX KEY ELEMENTS

- Assertiveness
- Mandates
- Solidarity
- Compromise
- Consolidation
- Replication/Role modeling



# THANK YOU.

Miriam A. Mobley Smith, PharmD, FASHP

Director of Strategic Alliances

Pharmacy Technician Certification Board  
(PTCB)

[mmobleysmith@ptcb.org](mailto:mmobleysmith@ptcb.org)





**STAY ENGAGED. STAY INFORMED.**

**222**

**JOIN US TUESDAY,  
JULY 11, 2017:**

**TBD**

**Questions?** Contact David Schaaf at [dschaaf@iarx.org](mailto:dschaaf@iarx.org) or 515-270-0713