

Technician Training Tutorial: Optimizing Pharmacy Workflow

Optimizing workflow in the pharmacy is important for both efficiency and patient safety. Your pharmacy should ideally function like a well-oiled machine or a Swiss watch, as they say. This involves both the pharmacy environment itself and how the work is performed within the pharmacy environment. Think about it like cooking a meal. Isn't it much more efficient to keep the dishes clean, remove garbage, and return ingredients to their proper storage locations as you cook, as opposed to generating a bigger and bigger mess as you work? Doesn't following recipes give you a better chance of producing a delicious dish instead of something you never intended to create? Because work in the pharmacy involves more people and more functions, this scenario is amplified when we apply it to dispensing meds efficiently and safely for patients. Keep in mind that efficiency is not the same thing as rushing. Working efficiently means that effective work is done in a minimum amount of time. In contrast, rushing or using shortcuts could lead to more problems, such as errors, that will end up costing time in the long run. A good example of a shortcut that is quick but does not improve efficiency is the use of unsafe medical abbreviations. They may be faster to write out than the words they represent, but they are also known to cause very serious, even fatal, errors. This *PL Technician Training Tutorial* covers practices you can use to improve pharmacy workflow.

Dexlansoprazole 30mg caps
1 p.o. q.d.
#30
refill 201

Chuck Upton is a 57-year-old male who comes in to your pharmacy with a new prescription for dexlansoprazole 30 mg capsules, take one by mouth once daily. He is a new patient, so you hand him your standard form for new patients to fill out, which will include information about his allergies, medical history, and insurance coverage.

Meanwhile, you notice three other people have come to the drop-off window, and things seem to be getting busy. The next patient has a list of ten refills she needs, so you ask her if she will be waiting to pick them up. She says, "oh no, I know this will take some time, so I'll be back tomorrow afternoon." You go ahead and put Mr. Upton's Rx before hers. Mr. Upton has taken a seat and will be waiting for his Rx to be filled today. He's okay with the 20 minute wait time.

What are some general practices I can use to improve the environment in my pharmacy?

As a rule, the pharmacy should always be kept both **clean and organized**. This may be easier said than done, especially when the workload in the pharmacy is at its peak. Still, as they say, an ounce of prevention is worth a pound of cure.

Always take the time to **place medications and other pharmacy supplies in their proper storage locations**. This helps ensure that correct medications will be chosen from pharmacy shelves for filling prescriptions. It also helps keep the dispensing process efficient, so you don't have to spend time searching for the correct supplies (e.g., bags, labels, lids, vials) when you need them. In addition, placing meds and supplies in their proper storage locations ensures that items stored in their proper places aren't hidden by other items that are inappropriately stacked or stored in places they don't belong.

Be consistent about **removing unnecessary items from the different locations in the pharmacy**. For example, cleaning out discontinued or unclaimed meds from the “will-call” area (or removing discontinued meds from a patient care unit in the hospital) and returning them to stock on a regular basis will help keep the will-call area organized, improving efficiency and patient safety. Errors that can be avoided by keeping the will-call area neat and up-to-date include giving meds to the wrong patient. Another example is placing meds that are soon to expire in a designated area to be returned. This can help prevent dispensing of meds that are expired or too close to expiration to be dispensed.

Keep in mind regulatory agencies in the U.S., such as state boards of pharmacy, mandate **standards of cleanliness**, such as keeping food and beverages out of refrigerators and freezers meant for medication storage. Place your food and beverages only in areas designated for food and beverages. Also, be sure to keep personal items such as purses and backpacks off of pharmacy floors and counters and in designated areas such as cubbies, lockers, or break rooms.

How can the pharmacy be organized?

Just as a house has designated areas for certain activities such as eating, showering, and sleeping, a pharmacy should have designated areas where certain activities are performed.

Define **areas of activity** and what functions should be performed in each area. Some of the areas of activity might include prescription drop-off, computer order entry, compounding, and prescription pick-up. Technicians can be assigned responsibility for the specific areas. Then technicians can be cross-trained to work in different areas. Defining areas of activity in the pharmacy can reduce chaos, and allow technicians to focus on one task from start to finish instead of bouncing from one task to another. Note that if you work in a hospital setting, the different areas within the pharmacy may be far more different from each other than those within a community pharmacy. Special competencies may be required for technicians to work in areas of the hospital pharmacy such as the IV room.

Assigning technicians to different areas can also help prevent bottlenecks in the pharmacy. For example, if only two technicians are working and both are at prescription drop-off, with no one assigned to the area for filling prescriptions, the queue at the pick-up window will be out of control with patients waiting for their filled prescriptions!

Monitor areas of activity to make sure work is not backing up anywhere and that problems are getting handled in a timely manner. For example, if you see that a technician in an area other than yours is very busy and you are having a lag in your work, you might ask if you can step in and cover for a few minutes so that tech can troubleshoot on whatever is holding him or her up.

You start entering Mr. Upton’s information into the computer. He has an allergy to sulfa drugs (rash), and he has been taking acetaminophen for headaches and OTC omeprazole for upset stomach. He doesn’t list any other medical conditions or Rx meds that he has been using. You look over his prescription to make sure all the necessary info is included: drug, dosage form, strength, route, directions, number of refills, etc. The information is all there, so you are ready to enter it in to the computer.

What practices can be used to optimize workflow?

There are a number of ways technicians can help optimize workflow in the pharmacy. It’s best when all pharmacy staff work toward this common goal.

Be **on time** for work. When folks come late to work, this can really throw a wrench in the workflow. No one likes to start out the day being behind. Besides, tardiness is unprofessional, a poor example for

coworkers, and a possible stimulus for disciplinary action. Make sure your breaks are scheduled at appropriate times of day (those that aren't the busiest), coordinated appropriately with your coworkers, and that you return from your breaks on time.

Once your pharmacy is clean and organized and areas of activity are established, it is important that the **work patterns** in each area are defined and followed. Work patterns mean that each technician is trained to perform the same work similarly, so the work is both efficient and safety checks are incorporated consistently.

Work patterns can be defined for functions such as gathering patient information, selecting medications from pharmacy shelves, returning medications to stock, and so on. For example, the work pattern for choosing meds from pharmacy shelves may involve a number of double checks as well as the use of shelf tags for information about alternate storage locations for look-alike, sound-alike meds. Work patterns may also incorporate customer service as a priority. Some examples include acknowledging patients as they approach the pharmacy counter, promptly answering the telephone, and informing patients ASAP about any problems regarding the filling of their prescriptions. Here is a very basic example of a work pattern for incoming prescriptions:

- Acknowledge the patient
- Gather patient information including date-of-birth, medication history, diseases/conditions, allergies, insurance coverage
- Screen the patient's prescription for omissions

Prioritize work, such as incoming prescriptions. Not all prescriptions must be filled ASAP, nor do all prescriptions need to be filled at once. Try to find out when each prescription needs to be ready and make a note on the prescription to inform other pharmacy staff. Then work on "in-store" prescriptions (or "stat" orders in the hospital pharmacy) first. Fill in the gaps and lulls in your workload with prescriptions that aren't as pressing such as those that you know won't be picked up for a day or two (or in the hospital, those that will go out on a scheduled delivery). Some work may be saved or scheduled for a time of day when you know you will be less busy.

Have a **system in place to handle problem prescriptions** such as insurance rejects, out-of-stocks, refill requests, etc. These can be separated from normal workflow with the use of a special system such as color-coded baskets. A technician can be assigned to work on these problems and follow up on them as necessary, rather than multiple technicians dealing with them individually and interrupting their assigned workflows. This technician will also need to notify patients of any issues with their prescriptions, whether they are in-store or planning to pick up the prescription at a later date.

Keep the lines of **communication** open. For example, communicate with your coworkers as soon as possible about any problems that you anticipate will affect workflow. Some examples of these types of problems include meds that are out of stock, special order meds, a large incoming order, a malfunctioning automatic dispensing machine, and a third-party payor computer that's down. When you communicate about these problems in a timely fashion, others may be able to help mitigate the problem, such as by providing an extra set of hands, notifying patients of delays, etc. Remember that work is all business and all about the patients. Don't let any kind of personal friction with coworkers impede professional communication.

Also communicate with patients about any problems having to do with their prescriptions. This type of customer service is very important and can help prevent unwanted outcomes such as frustration or inconvenience for patients as well as delays or interruptions in their drug therapy. In the hospital setting, nurses will appreciate being kept abreast of problems with their patients' orders that might lead to delays.

An example of this might be a med that is especially labor intensive to prepare or the need for an order to be clarified by the pharmacist with a prescriber prior to dispensing.

Be sure to **minimize distractions** when you are on duty in the pharmacy. Avoid excessive chatter about personal business, personal phone calls, text messaging, internet surfing, etc. Stay focused and on-task when you're working to help reduce the chance of errors and disturbances to workflow. Use your break times to attend to personal matters and socialize.

Mr. Upton's Rx is rejected by his insurance because it will require prior authorization. Mr. Upton needs to try a generic form of this type of stomach medicine before his insurance will pay for dexlansoprazole, which is not available as a generic and is more expensive. Mr. Upton's Rx goes to another tech assigned to work on third-party rejections. You hear the technician tell Mr. Upton that his Rx is going to take longer than expected because there are issues with his insurance.

Mr. Upton says he would be glad to come pick up his Rx first thing in the morning. Your coworker thanks him for his patience and assures him that his med will be waiting for him when he arrives tomorrow.

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