



SASKATCHEWAN  
COLLEGE OF  
PHARMACISTS

# ***SaskTech***

**(Guidance Document)**

**An Evaluation and Monitoring Tool**

**For Pharmacy Assistants**

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## **Introduction**

Today's society demands that all things are available at all hours, including pharmacy services. With a pharmacist shortage, extended pharmacy hours and a population that is aging, pharmacists are extremely busy. More importantly other forces are creating an increased demand on the pharmacist to perform in an optimal role. To assist the pharmacist in meeting these challenges, many functions may be assigned to pharmacy assistants to allow pharmacists to concentrate on other duties such as providing pharmaceutical care to their patients.

This document has been adapted to suit the needs of Saskatchewan pharmacists from a document developed by the College of Pharmacists of British Columbia. The Council of The College of Pharmacists of British Columbia has identified an opportunity to use pharmacy assistants and developed the TechWise Project to assist pharmacists. This package contains information that was developed from the TechWise Project of B.C. to assist pharmacists in hiring qualified assistants to meet the needs of their pharmacy; specifying functions an assistant may perform if that is within their training, skills and abilities, and questions which may be used to assess the skills and knowledge of assistants.

The purpose of this document is to provide a tool when hiring assistants and as an on-going evaluation or monitoring tool. This tool may be used "as is", or as a starting point for developing such a document specific to that site. This document contains two sections of questions, the first dealing with assistant training, and the second dealing with knowledge assessment. A list of functions that an assistant may perform based on the pharmacist's assessment is also included in this document; however these functions are to be assigned to assistants at the discretion of the pharmacist. Pharmacists may use this tool to hire assistants that are most suited to their practice, and appropriately employ assistants for non-professional duties and functions.

The appendix contains an abstract of the TechWise Survey from November 2002. A more detailed description of the survey results is available on the website of the College of Pharmacists of British Columbia at [www.bcpharmacists.org](http://www.bcpharmacists.org).

## **Pharmacy Assistant/Technician Training Programs**

There are numerous post-secondary pharmacy technician training programs available throughout Canada. With the absence of national or provincial quality assurance standards for curriculum content and educational outcomes, the employers of pharmacy assistants are left with the task of evaluating both the qualifications of potential employees, as well as their ability to apply the training, either formal or informal, in everyday practice.

Research shows that assistant/technician training programs vary in many areas. There are part-time, full-time and correspondence programs currently offered in many jurisdictions. These programs range in length from about six months to one year or more with no measurable correlation to standardized educational outcomes. Some of these programs have practicum components while others have no practicums at all. Some of the programs may include aseptic training, hands-on dispensing labs, and compounding techniques with the amount of time devoted to these activities varying widely.

Currently in Saskatchewan training of pharmacy assistants is not required, and many assistants have on-the-job training. A pharmacy technician training program is offered at the Saskatchewan Institute of Applied Science and Technology (SIAST). This program is a 38 week program that offers courses in communications, pharmacy law, pharmaceutical calculations, dispensing, and computer skills, among many others. This program also has a community and a hospital pharmacy practicum. While SCP does not endorse or accredit any pharmacy technician training programs, the program head of the SIAST program is confident that the graduates from this program would be knowledgeable in the areas addressed in this document. More information on the course is offered at [www.siastr.sk.ca](http://www.siastr.sk.ca).

Even with formal training, assistants may not meet the specific needs of a pharmacy, and therefore more training may be required.

This information is not to endorse or discredit any particular program. Instead, it is meant to educate and inform pharmacists who are looking for particular qualifications and skills in job applicants. The questions that follow later in this document have been developed to help an employer determine if an applicant's training is suitable to the practice environment and to identify learning gaps to be addressed.

# **Pharmacy Assistant Functions**

***An “assistant” is defined as a person who is not a pharmacist or intern, and who is employed in a pharmacy to assist the pharmacist in performing functions.***

***The title “Technician” may be used if the assistant is legally certified or registered as such, or successfully completes a training program accredited by an agency acknowledged by the Saskatchewan College of Pharmacists.***

## **1) Technical Role**

The following is a list of technical functions which may be assigned to a pharmacy assistant at the pharmacist's discretion. The pharmacist may allow these functions to be completed by an assistant if the pharmacist is satisfied that the assistant has had adequate training, either formal or informal, and is competent to perform these tasks. These functions may be performed by an assistant only under the direct supervision of a pharmacist. This means that the pharmacist is present and working directly with the assistant. The pharmacist is ultimately responsible for the quality and accuracy of these functions. The ratio of pharmacist to assistant working in the pharmacy and performing these functions is limited to 1:1, excluding interns unless the assistant has met the requirements under the section, Enhanced Role which follows this section.

The pharmacist is responsible for and must supervise the following functions which may be delegated to an assistant:

### **Drug Distribution**

- Accept and verify accuracy and completeness of written prescriptions or refill requests from the patient or the patient's representative
- Collect and verify accuracy and completeness of all relevant patient demographics, including known allergies
- Establish and maintain patient profiles
- Transcribe prescription data to patient medication profile
- Refer therapeutic issues and questions to the pharmacist

- Select the product or products needed and check the expiry date(s)
- Calculate, convert and document the result of dosage calculations
- Verify calculations with the pharmacist
- Retrieve, count, pouring, weighing, measuring, reconstituting and mixing medications
- Verify accuracy and appropriateness of ingredients and quantities
- Select type of prescription container
- Label container, including relevant auxiliary labels
- Verify the accuracy and completeness of a pharmaceutical product prepared for release
- Prepare bulk manufactured products
- Prepare Sterile product and extemporaneous compounds (prepare IV admixtures, TPN solutions, chemotherapeutic agents requiring aseptic technique)
- Confirm that the pharmacist has had the opportunity to review the prescription and patient profile or health record
- Confirm that the pharmaceutical product has been checked and signed off by a pharmacist
- Gather appropriate patient information materials as specified by the pharmacist
- Ensure that the pharmacist has the opportunity to interact with the patient.

#### Clerical

- Prepare and reconcile third party billings
- Prepare receipts, claim forms, invoice, letters and memos, and general filing
- Generate long-term care data (i.e. medication administration record, medication review)
- Maintain drug information files
- File prescriptions as required by law, and pharmacy policy
- Receive and send electronic communication
- Record Narcotic and Controlled Drug sales and receipts as required by law

#### Communication Skills

- Utilize effective communication skills - with clients, co-workers, students and interns, other health care providers, and suppliers. Questions relating to prescriptions, drug information, poison information, or any health matter must be referred to the pharmacist

- Medication reconciliation – identify problems which must be referred to the pharmacist
- Clinical tasks – i.e., refer to the pharmacist any lab values beyond therapeutic range
- Act as a preceptor when required

### Inventory Management

- Monitor and replenish stock levels to ensure sufficient quantities for optimal operation
- Prepare and place orders from specified sources
- Maintain storage facilities
- Follow procedures for the proper storage, handling, preparation, distribution, removal and disposal of drugs
- Maintain inventory for prescription, non-prescription, investigational and Special Access drugs
- Rotate stock and monitor expiry dates
- Identify expired products for disposal, destruction, or return to manufacturer
- Prepackage medications (including unit dose packaging)
- Deliver medications to institutional wards
- Restock institutional wards with narcotics and controlled drugs
- Restock automated dispensing machines

## 2) Enhanced Role

The assistant may perform functions beyond the technical role described above within his/her competencies when the following conditions as outlined in a. and b. are fulfilled:

- a. The pharmacy manager can demonstrate that adequate quality assurance measures are in place in the pharmacy to permit the assistant to function in an expanded role. Quality assurance management must incorporate standards for training, certification, recertification, and outcomes assessment; and,
- b. The assistant scores at least 80% on the questions in this document, or is a graduate from a program accredited by a credible agency, or is certified by a credible agency, both of which are acknowledged by the Saskatchewan College of Pharmacists.

This document is a competency based tool that members can use to hire qualified assistants to meet the needs of your practice, and as an ongoing evaluation and monitoring tool to deploy qualified assistants into more optimal or expanded support roles. The latter can be achieved through quality assurance measures and the assistant scoring at least 80% on the knowledge appraisal. For quality assurance measures, we expect pharmacy managers to have:

- a. defined standards for education and training;
- b. a certification and re-certification process that could perhaps be sponsored by the employer;
- c. periodic outcomes assessments that would include periodic reviews of the assistant's performance, random checking of the drug distribution system to determine its safety, and documentation of duties and modifications arising from these assessments.

Under these circumstances, the pharmacist to assistant ratio and direct supervision are waived. The pharmacist is responsible to maintain a "safe practice environment" as stated in the NAPRA document, *"Model Standards of Practice for Canadian Pharmacists"*, Professional Competency #5 – Apply Management Principles. The assistant may perform functions under the supervision of the pharmacist meaning that the pharmacist, while

ultimately responsible for the quality and accuracy of these functions, does not need to be present and working directly with the assistant. However, the pharmacist must be available to the assistant. This allows for *tech-check-tech* processes, being mindful that the pharmacist is responsible for all assistant-completed activities. This allows for assistants to perform more duties with more independence, based on their personal level of competence.

### 3) **Ethical Conduct**

Pharmacy Assistants:

- 1) are expected to practice ethically and professionally at all times. This includes respecting and maintaining patient privacy and the confidential nature of the pharmacist/patient relationship;
- 2) must practise within the limits of their role, personal knowledge and expertise (integrate knowledge, skills, values and judgment, and use critical-thinking skills in all situations) and be able to recognize situations that must be referred to a pharmacist;
- 3) shall ensure that they keep current with, apply knowledge of, and work within practice expectations, relevant policies and procedures, and federal and provincial legislation;
- 4) must understand their role and contribution to the pharmacy team, while also acknowledging the role of the pharmacy team in promoting the patient's health and wellness. They shall contribute to team problem-solving, decision-making, and collaboration by developing effective working relationships, using team-building strategies, communicating effectively and by supporting members of the pharmacy team.

Components of this section have been adapted, with permission, from the Ontario College of Pharmacists' document "*Competency Profile for Pharmacy Technicians*" available on the web at <http://www.ocpinfo.com/>.

## **References**

1. TechWise Hiring Smart. A Project of the College of Pharmacists of British Columbia.  
[www.bcpharmacists.org](http://www.bcpharmacists.org)
2. Ontario College of Pharmacists. The Role of the Pharmacy Technician.  
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3. Standards of Practice for Saskatchewan Pharmacists. February 1998.
4. Model Standards of Practice for Canadian Pharmacists. April 2003. National Association of Pharmacy Regulatory Authorities.

# **Appendix**

## TechWise Survey

### **Abstract**

In November 2002, a survey was distributed to all community pharmacies in British Columbia. The purpose of the survey was to gain insight into the duties, roles and attitudes of pharmacy technicians. A total of 309 responses were received from all types of pharmacies (chain, independent etc.) in 69 communities throughout the province. Of the 40% of respondents that reported having a college education, only 49% reported that they have completed a pharmacy technician training program. The survey results showed that...

- More than half of the technicians report that they do less than 40% of all the data entry and pharmacy related paperwork within a given day.
- Technicians are highly involved in prescription product preparation as well as stock ordering and receiving.
- Patients are more likely to encounter a technician at both the drop-off and pick-up areas of the dispensary.
- Insurance issues are mostly the responsibility of pharmacists while inventory management is mostly the responsibility of technicians.
- Most technicians feel that they are utilized effectively and are ready to take on more responsibilities.

The last question on the survey asked technicians to describe how they could contribute to the profession in the future. More than 72% of the survey respondents provided comments that mostly related to a continued support role with a desire to take on more of the data entry and computer functions. Many responses related to the desire to become more involved in patient interactions relating to device training and a need for education and development opportunities for technicians.

### **Opportunities**

The survey results show that there is an opportunity for technicians to take on more responsibility in the areas of data entry, paperwork and insurance issues. With the increasing focus of pharmacists on the identification, prevention and resolution of drug-related problems, one would expect that patients would be more likely to encounter a pharmacist at either the drop-off or the pick-up areas of the dispensary counter. The survey results showed that technicians were often in both of these locations leaving a question as to when and where the pharmacist is consulting with the patient about their drug-related needs. More details of the survey results can be found on the College website at [www.bcpharmacists.org](http://www.bcpharmacists.org).