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Toward uniform standards for pharmacy technicians: Summary of the 2017 Pharmacy Technician Stakeholder Consensus Conference

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In pursuit of a path toward resolving unsettled issues related to pharmacy technicians, the Pharmacy Technician Certification Board (PTCB) sponsored a stakeholder consensus conference on February 14–16, 2017, in Irving, Texas. Planned in collaboration with the Accreditation Council for Pharmacy Education (ACPE) and the American Society of Health-System Pharmacists (ASHP)^a and under the guidance of an advisory committee representing all major branches of pharmacy, this invitational event yielded important recommendations concerning the definition, education,^b entry-level requirements, advanced practice, certification, and regulation of pharmacy technicians.

The 89 invited participants in the conference (eAppendix A) included pharmacists and technicians from various types of practice and educational settings, pharmacy association executives, regulators, and representatives of the general public.

Approximately 350 individuals participated remotely in the plenary sessions of the conference through a Web link.^c

Design of the conference

In consultation with the advisory committee, the conference planners established objectives for the event (sidebar), designed a preconference survey that was sent to pharmacy opinion leaders and conference participants, established the event agenda, selected speakers, identified invitees, and recommended readings for participant review in advance of the event. (Some key readings are cited here.^{1–4}) Individuals engaged in planning and conducting the conference are listed in eAppendix B.

The program consisted of 5 plenary sessions (each focused on separate facets of the conference objectives), 3 work-group sessions (during which conferees divided into 4 groups to discuss specific issues and draft related recommendations), and a final session for polling of conference attendees on level of agreement or disagreement with recommendations from the work groups.

Conference opening

Everett B. McAllister, chief executive officer and executive director of PTCB, reviewed the objectives of the conference and referred to “the struggles boards of pharmacy, technician educators, and employers face...partly because we don’t have a good career plan for technicians.” He added, “The time has come to identify realistic and achievable pathways for

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^a ACPE and ASHP jointly sponsor the Pharmacy Technician Accreditation Commission, which is the accrediting review committee for pharmacy technician education programs.

^b The term *pharmacy technician education* is used in this report to encompass the full breadth of academic, simulated experiential, and practice-setting experiential education of pharmacy technicians.

^c Web participants could ask questions or make comments in writing during the discussion portion of plenary sessions; they did not vote in the polling process at the end of the conference.

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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.

Conference Advisory Committee

Jason Ausili, Pharm.D.
Director, Pharmacy Affairs
National Association of Chain Drug Stores

Malcolm Broussard, B.S.
Executive Director
Louisiana Board of Pharmacy

Al Carter, Pharm.D., M.S.
Senior Director, Pharmacy Regulatory Affairs
CVS Health

Charles E. Daniels, B.S.Pharm., Ph.D.
Pharmacist-In-Chief and Associate Dean
University of California San Diego

Kenneth Mark Ey, B.S.Pharm.
Vice President of Operations
CARE Pharmacies Cooperative

Diane Halvorson, RPhTech, CPhT
Lead Pharmacy Technician
Vibra Hospital Fargo
Pharmacy Technician Member
North Dakota State Board of Pharmacy

Timothy R. Koch, B.S.Pharm., P.D., C.H.C.
Senior Director, Pharmacy Practice Compliance
Walmart Corporate Office

Janet M. Liles, M.S., CPhT
Executive Director
Pharmacy Technician Educators Council

Scott A. Meyers, B.S.Pharm., M.S., FASHP
Executive Vice President
Illinois Council of Health-System Pharmacists

Matthew Osterhaus, B.S.Pharm.
Coowner
Osterhaus Pharmacy

Jon Roth, B.S., M.S., FAPhA, FASHP
Chief Executive Officer
California Pharmacists Association

Steve Rough, B.S.Pharm., M.S., FASHP
Director of Pharmacy
University of Wisconsin, Madison School of Pharmacy

Rafael Saenz, Pharm.D., M.S., FASHP
Administrator, Pharmacy Services
University of Virginia Health System

technicians that support medication safety and protect our patients." Commenting on PTCB's decision to suspend implementation of its 2020 accredited-education requirement for technicians seeking PTCB certification,⁵ McAllister said that the results of the conference will help determine future plans for PTCB program changes.

Framing key issues

Two speakers framed the key issues of the conference from separate perspectives—those of the pharmacy profession and the public. The first perspective was provided by **Michael A. Moné**, a vice president at Cardinal Health, president of the Ohio Board of Pharmacy, and a member of the ACPE board of directors. Moné said, "Pharmacists must facilitate the advancement of pharmacy technicians...further enabling pharmacists to achieve their rightful place as healthcare providers." Commenting on the profession's obligation to assure the public of the competency of technicians, Moné remarked, "The process of providing the public with...guarantees of trustworthiness already exists in the form of the accreditation, education, examination, and licensure model" that is applied to pharmacists. He concluded, "Our charge at this conference is to come to consensus [on what the public expects], how to meet those expectations, and what we must implement in order to deliver the value we promise to the healthcare system, the profession, and patients." (The full text of Moné's remarks is published in *AJHP*.⁶)

Christopher Jerry, head of the Emily Jerry Foundation, spoke from the public perspective and drew on the personal tragedy of having lost a young daughter to a fatal compounding error by a pharmacy technician. Commenting

on the history of pharmacy-related medication errors, Jerry said that opportunities for such errors are likely to increase given the risks associated with new medications and the expanded use of medications. Jerry said that although the public expects all healthcare workers to be well educated, this basic expectation is not being met in the case of pharmacy technicians. He was critical of the fact that there are no uniform state requirements for ensuring the competency of technicians, which he attributed in part to a lack of public awareness about the scope of technician responsibilities. Jerry said that uniformly trained, competent pharmacy technicians would free up pharmacists to provide more patient consultations, which are proven to reduce medication errors.

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