Increasing pharmacy workflow efficiencies

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Disclosure

• I have no conflicts to declare and have had complete editorial control over this presentation
• I am receiving an honorarium for this presentation
Program learning objectives

• Using new technologies to improve workflow
• Expanding the intake function
• Identifying disruptors to workflow
• Discuss ways for pharmacists to dedicate more time to expand scope activities
• Provide insight into how to use pharmacy staff more efficiently
A sustainable practice

• Need to be efficient and maximize our resources
• No room for waste and inefficiencies
• Finding time to change
• Necessity is the mother of invention
• Many service opportunities are available for us to develop and provide exceptional care for our patients
• Help drive the change to a service model
Using new technologies to improve workflow

• Technology - robotics, counting, packaging
• Software - using workflow software technology to help drive change in the pharmacy
  – Paperless
  – Workstations are flexible and are driven by the person at that station and not by the physical work
  – Work can be done anywhere
Packaging technology

• By using technology such as bar-code scanning when filling, you improve speed and accuracy as well as improve documentation

• Improve speed and accuracy when using counting and packaging technology for both regular and compliance card packaging
Using workflow software

• Advantages
  – Very flexible work environment that can be tailored to the staffing set up, registered technicians
  – Workflow streams can be set up to keep different areas of your business separate – e.g., methadone, compounding, compliance packaging, nursing homes
  – Less wasted footsteps since the software pushes the work to you, and by logging into the system it is there already prioritized by time - staff aren’t running around looking for work
Using paperless workflow

• Advantages
  – Only print the paper that you need when you want it - for example you don’t need to print a whole label set at input, the label is only printed when it is required at packaging after you scan the product
  – Print receipts only after the Rx is checked
  – Much less shredding and wasted paper (time and money)
  – No need to re-scan the hard copy at the end of the night since the hard copy is created with each key stroke on the computer and everyone who worked on the Rx is logged and recorded
• You know where the Rx is in the process at any time
• On Rx pickup, you know if there are other Rxs - e.g., not filled yet, in the fridge or there is a problem
• Track narcotic signatures and ID at Rx pickup
• Patients can use an electronic signature for medication reviews or another document that they may need to sign for
Fax Rx

- Use this technology to control faxing in and out electronically so that you don’t have paper that needs to be scanned into the patient profile and then shredded
- Fax doctors directly from the software, also easy to see which doctors you have faxed
- Can save faxes you need to follow up on - for example recalls
- Reduce wasted paper - delete the faxes that are advertising and other junk
- Transfer to another pharmacy from this module
- Fill Rxs right from the screen and add the image right away
- Image is very clear vs grainy fax
Expanding the intake function

• Use drop-off technology that allows you to scan in the Rx and set the time for the patient
  – Allows staff to get through more patients quickly so that they aren’t standing waiting to drop off their Rx
  – Allows staff to focus on the patient and other needs, make sure their profile is complete – e.g., smoking status, email address, cell numbers, allergies
Thought starters

• Other non-retail health care providers and other service providers typically have someone greet you
• Often another provider then takes a history and gathers other information
• You then see the provider
• Another person takes your money and books another appointment or schedules a follow-up
Intake
Pharmacist: counsel, clinical check, put into intake queue

Filling
Pharmacy technician: input Rx, fill

Cash
Cashier/ pharmacist: review if questions
Other technologies

• Use scheduling software for medication reviews and any other service appointments
• Use scheduling software to book follow-up appointments
• Use letters prompted by the software for those who qualify for a program or service
• Use electronic forms to pre-populate patient name and the medications that are on their profile for creating medication reviews
• Use electronic forms for consent – e.g., flu
Other technologies (continued)

• Use of tablets to capture patient consent and information (not readily available yet)
• Technology to email patients information and videos on how to use a device vs. printing materials
• Use apps and the website or interactive voice response (IVR) to have patients contact you for refills
• Review your existing dispensing software to see the functionalities that you are not using to the fullest
Other considerations for workflow efficiency

• Use workflow software to help keep work on track and to push the right work to the right person at the right time and space in the flow

• Make sure that you have the right number of computer workstations - almost need one for each staff person, available at counselling areas and consultation room - are they in the right place?

• Important for the cash area and the semi-private counselling areas to be in the right location and the right size, to control flow

• Proper placement of high movers - e.g. generics which account for 65% of Rxs
Other considerations (continued)

- Is there a clear process for how the work is handled?
- How do you handle problems and other business such as compounding or compliance packaging?
- Is the dispensary clean, neat and organized?
- Are the tools you need accessible?
- Are dispensing supplies in the right place? Vials, etc,
- Technology - do you need it? If you have it is it in the right place?
- Use an expert to do computer aided design (CAD) drawings and computer modeling, maximize space and efficient use of staff
Workflow disruptors

• Telephone
  – Designated person to answer the phone or use technology such as IVR to help with refills and reduce calls
  – Are pharmacists taking calls that others can handle?
    • Pharmacy staff need to be trained to handle these calls

• Problem prescriptions
  – Drug shortage, coverage issues
  – Have a system to move these outside of the regular flow
  – In larger pharmacies use a designated person to deal with these and use different colored basket so that if it is being dealt with you don’t keep revisiting it
  – Have documentation to keep simpler (your software can help move these items into a TROUBLE QUEUE)
Workflow disruptors (continued)

- **Specialties**
  - Move these out of the regular flow
  - Use designated and scheduled staff
- **Compliance packaging**
  - Move these out of the regular flow
  - Designate a time and space and staff to deal with, depends on your volume
- **Unorganized dispensaries**
  - Unorganized = mistakes = time wasting = wasted opportunities to change and provide new services
How to handle the disruption to flow while the pharmacist is performing new services

- System in place for work to continue when the pharmacist steps out to counsel or provide another service
- Use of regulated technicians
- Tools available to make pharmacist efficient
- Use a messaging system that the pharmacist can see during their appointment - might be a simple answer they can email back
- Tips to politely shorten appointments that have become a social visit
- Pharmacy staff bill for the service
How pharmacists can find more time

• Manage your time appropriately
• Openness to change
• Don’t allow everyone and the work around you dictate exactly what you do
• Prioritize your work
• Set daily goals to keep you on track
• Communicate the bigger picture with your entire team
Time management

- Start with a clean slate - clean counters go a long way
- Set timely goals - use “To Do” lists
- Mini-meetings for daily priorities
- Plan your day before it starts - urgent items
- Good support staff in place
Time management (continued)

- System to deal with incoming email, faxes
- Keep a list handy of things to do for yourself and staff in the slower times
  - For yourself these could include clearing your desk, reading emails
  - For staff, checking on expiries, call back programs, reminders of appointments etc., seasonal tasks
- Deal with clutter - don’t keep notes everywhere, have them in a binder or in one place where everyone knows to look
All we have to decide is what to do with the time that is given to us.

-Gandalf
Setting your priorities:
Big rocks go in first
What is my role?

All staff
- Listen to patients
- Hand out bag stuffers
- Promote events for the pharmacy
- Identify new products and services - e.g., Gluten Free

Pharmacy assistant, Pharmacy technician
- Identify patients who qualify for service and flag them
- Give the service offering letter
- Appoint a champion for different programs - e.g., adherence

Cashier
- Highlight the service letter
- Book the appointment

Pharmacy staff
- Print reports and start the paperwork process
- Finish off the billing - e.g., use a STAMP for Pharmaceutical Opinion
Professional service workflow

• Think of two separate streams of revenue
• Allot resources accordingly, slot times for overlap and accommodate the appointment-based services
• Build in capacity by maximizing the duties of other dispensary staff to allow for openings for services such as follow-ups to occur during the regular work day
• Use the same process to ensure your workflow in your professional service is efficient
• Staffing - do you have the right professional staff and support staff?
• Workflow - is it organized so that you have all the tools you need? Do you have a computer in your counselling room? Is the counselling room accessible to you without wasting too much time to get there?
• Physical space - is it conducive to your service, clean, professional?
• Time management - have everything you need handy, don’t look for notes, files, pamphlets, spend the time upfront to have everything handy
• Do you have the technology you need and are you using it appropriately?
Staff review

• Review weaknesses in your team and put a plan in place to correct this
  – Key to review all of your staff including your front shop
  – Make a list of each job description, add all of the tasks that each of your team does
  – Review the list - are you utilizing each staff position to the fullest?
  – Can you shift functions? E.g., use your front shop staff to take on as much of the administration as you can (such as cash handling, calling to remind patients of their appointment)
Staff review (continued)

- Dispensary assistants - can they do the prep for some of your services? Can they help identify patients who qualify? Can they do the billings for your Pharmaceutical Opinions, MedsChecks and other services?
- Pharmacy technicians - do you have any? What functions could you move to this person to help free up time for your pharmacists to perform clinical services?
- Pharmacists - are you maximizing their face time with patients?
- Management - are you taking time to see what is happening?
- Do you cross-train so that when one individual is sick or on vacation your dispensary continues to work efficiently and the work doesn’t stop?
Efficient use of staff

• Staff meeting to have all staff on the same page, they need to understand the importance of the new pharmacist role
• Assign new roles to staff
• Have a system in place for scheduled appointments - use software, calendar
• Identify times when you can offer services without an appointment - staff should be aware of these times to help promote your services
Efficient use of staff (continued)

• Choose your focus, start small and build from there otherwise you don’t accomplish anything and get frustrated
• Set up measurement tools, regular follow up with your team
• Put a plan in place to market your services
• Change takes time and commitment to the change
Use staff appropriately

- Everyone knows their role in the whole system
- All aware of the goals of the pharmacy, focus
- Right person performing the task
- Proper scheduling
Simplified change management

www.davidgoadsblog.blogspot.com
Where do I start?

• Review what you are doing today
• How do we build in capacity to deliver the expanded services
• Where do you start:
  – Staffing - who does what?
  – Workflow efficiency and software
  – Technology review
  – Time management
  – Manage change and set the stage for change
References

• 1-www.davidgoadsblog.blogspot.com
Thank you

• Questions?