



# Building a Successful Ambulatory Care Practice

A COMPLETE GUIDE FOR PHARMACISTS

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## **DEDICATION**

This book is dedicated to the ambulatory care pharmacy leaders who helped make our current practices possible, to the many ambulatory colleagues we have worked with who constantly provide us support and inspiration, and to future ambulatory care pharmacy practitioners. May you use what we have learned to further develop an area of pharmacy practice that is essential for optimal patient care.

*Mary Ann Kliethermes*

*Tim R. Brown*

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## **DEDICATION**

I would like to dedicate this book to my family whose support and encouragement is unending and is the basis for who I am—a Mom.

*Mary Ann*

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## **DEDICATION**

I dedicate this book to my Mother. Although she is no longer in this world to share in both the joy and relief of completing this work, her voice has been with me throughout this process. I still hear her whispering in my ear, “You cannot learn common sense from a book.” And, as always, my Mother was right! So I encourage you to use this resource to become a better pharmacy practitioner, but do so by balancing what you read with what your heart knows and feels.

*Tim*



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## PREFACE

Imagine two friends who both practice in ambulatory care settings discussing the challenges of pharmacy practice and the ever changing health care world. How many times have you been one of those pharmacists? We found that we were having this conversation on multiple levels with many of our colleagues and always ending with the words, “Well, what can you do? I wish there was a guide!” It was during one of these conversations when we brainstormed a “wish list” that would make our lives easier, a resource that covered ambulatory practice from beginning to end and could be used by new practitioners as well as seasoned pharmacists. The original idea was not a book, but rather a web site that would act as a repository for materials ranging from business planning to reimbursement mechanisms to promotion of our profession. As we both decided how to have an impact, we realized our original idea of web-based materials was a good one but something more was needed such as instructional or basic information. We wanted to ensure these resources would be used by pharmacists starting an ambulatory care practice to avoid the pitfalls and errors we had made building our respective practice models.

We decided to write a book—to create an informational resource that had a traditional feel, such as a “How to” book, but coupled with a dynamic reference that could be updated such as a complementary web site outlined to follow the book’s chapters. The combination of these two types of references would provide our colleagues access to material that would answer their questions, offer educational tips, and provide tools to assist in achieving their career and practice goals. For the project to be successful, however, the book and the web site would need experts who lived and worked in ambulatory care pharmacy practice and understood what it is like to search for an answer to a question that has never been asked. The nine chapters of this book are authored by pharmacists who have dedicated their professional careers to building ambulatory care practice models that allow pharmacists to provide quality care and continuity of care to their patients. Each author has provided insight, wisdom, practice tips, and everyday common sense to create a resource that will unify us, enhance the care we give our patients, and strengthen our profession as a whole.

The chapters are a sequence of steps that an ambulatory care pharmacy practitioner would use to develop or enhance his or her practice site; they build upon each other. However, each chapter can stand on its own as an informational resource for the practitioner who may only need to read about a particular topic. Within each chapter, you will find web icons  that denote additional web resources corresponding to the chapter’s material and, in some cases, you may even find tools that help you achieve the goals outlined by the chapter. Each author submitted reference links, practice

tools, and examples so that the chapter relates to where you are in the process of building your practice model. The web toolkit can be found at



Web Toolkit available at

**[www.ashp.org/ambulatorypractice](http://www.ashp.org/ambulatorypractice)**

(See page ix for the list of web tools and information about the toolkit.)

In addition, you will also find a case-based scenario running throughout the book depicting a pharmacist who works with a physician named Dr. Busybee. This pharmacist represents all of us! He or she is working to start and grow a practice while roadblocks, red tape, and life get in the way. We thought this was the best way for the reader to identify with what each chapter is teaching. As you read, imagine yourself as the pharmacist portrayed in the case. For some, you will find answers to a current situation or dilemma; for others, you may reflect and think this is exactly what you went through; and, for still others, you may remember an experience far worse than what we have described. This simply illustrates that no matter where you are in the evolution of your practice, you are or have been the pharmacist carving out your niche in Dr. Busybee's office.

As editors of this project, we were able to relive some of our career moments. We often wondered, "How did we ever achieve our goals and create the practice we have today?" If only there had been a book for us. But, then again, we are both surprised that a conversation between two friends yielded such an amazing collaboration among our colleagues and friends. Maybe we should have talked sooner and more often!

*Mary Ann Kliethermes, PharmD*


*Tim R. Brown, PharmD*



# Ambulatory Care Practice: The Toolkit for Pharmacists

## Overview of the Book and Toolkit

*Building the Ambulatory Care Practice: A Guide for Pharmacists* is a how-to guide to creating and managing an ambulatory care clinic, from building a business model to clinical practice, risk management and liability, reimbursement, marketing, and credentialing.

The toolkit was developed to work in collaboration with the book to provide more tangible tools for building the ambulatory care practice. The types of tools include sample plans, sample forms and documents, and example case studies. The toolkit is organized by the chapters in the book. Within the book chapters, tools are identified by an icon.  These icons alert the reader to the tools available in the toolkit to facilitate the concepts and processes discussed in the chapter. At the end of each chapter, a QR code is inserted for smart phones.

## How to Use This Toolkit

The tools included in this kit are downloadable and adaptable. To access a tool, simply click on the title of the document.

Goals are provided at the beginning of each list of tools to illustrate the purpose of the tools and organize the steps in the process.

Additional guidance to understanding the tools and how to use them is provided. For more complete information on the process and use of the tools, please refer to the designated chapter.

## List of Tools by Chapter

### **CHAPTER 1:** DEFINING THE AMBULATORY PATIENT CARE MODEL

#### **GOAL:**

- Define your practice model.

#### **TOOLS:**

Conventions Useful for Professional Networking  
Example Referral Forms  
    Pharmacotherapy Consult  
    Generic Referral Form  
Sample Scope of Practice  
Sample Collaborative Drug Therapy Management Agreements  
    Collaborative Drug Therapy Management Agreement (SJRMC)  
    DMG MTM Agreement  
Sample Mission and Vision Statements

## **CHAPTER 2: PLANNING AND STEPS TO BUILDING THE AMBULATORY PRACTICE MODEL**

### **GOAL:**

- Develop a proposal for your practice model by assembling and building the key supporting data.

### **TOOLS:**

Resource Needs Worksheet

Revenue from Reimbursement Worksheet

Sample Case: Medication Therapy Management Service

## **CHAPTER 3: DEVELOPING A BUSINESS PLAN FOR AN AMBULATORY PRACTICE**

### **GOAL:**

- Develop a written business plan that will help you communicate the proposal, secure funding, guide the initiative, and keep the practice on track.

### **TOOLS:**

Business Plan Template

Sample Business Plan for an Ambulatory Heart Failure Clinic

## **CHAPTER 4: MARKETING YOUR AMBULATORY PRACTICE**

### **GOAL:**

- Through market research, develop an appropriate marketing plan and strategy for your practice.

### **TOOLS:**

Sample Brochures

Brochure 1

Brochure 2

Physician Questionnaire

Patient Survey

Marketing Plan Template

Physician Fax Form

Work Flow Diagram

## **CHAPTER 5: CREATING THE AMBULATORY PATIENT CARE MODEL**

### **GOAL:**

- Use two of the four tracks to start creating the care model: Clinic Operations and Policy and Procedures.

**TOOLS:**

Example Referral/Order/HIPPA Consult Form  
Example of an Anticoagulation Management Fact Sheet  
Example Warfarin Monitoring Sheet  
Examples of Clinic Policy and Procedure Documents  
    Billing Policy Example  
    Medication Management Clinic Policy and Procedure  
Examples of Billing Procedure Documents  
    Proposed Point-based Billing Procedure for Clinical Pharmacy Services  
    Billing Incident  
    - to Physician  
    Proposed Time-based Billing Procedure for Clinical Pharmacy Services  
    Billing Incident  
    - to Physician  
New Patient Intake Form  
DM Patient Assessment  
MTM Patient Note Template  
Revised Initial Patient Note  
Patient Education Web Resources

**CHAPTER 6: COMMUNICATION AND DOCUMENTATION FOR AN AMBULATORY PRACTICE****GOALS:**

- Develop efficient and comprehensive documentation for your practice: both manual and electronic.
- Develop communication techniques to manage practice quality.

**TOOLS:**

Auditing Tool  
Example Documentation Elements for EMR/PMR  
Examples of Community-based/Clinical Pharmacy Documentation Software  
Web Sources  
Example SOAP Note and 7 Lines of Questioning  
Link to AMA Web Site for Bookstore (three books on EMRs)  
Link to Ohio Patient Safety Institute Health Literacy

**CHAPTER 7: QUALITY ASSURANCE FOR AMBULATORY PATIENT CARE****GOAL:**

- Apply key quality principles and implement methods to the structure of your clinic or service in order to provide quality services.

**TOOLS:**

PDSA Worksheet  
Quality Measure Feasibility Checklist  
Example Case: Medication Therapy Management Clinic  
Additional Selected References  
Ambulatory Care Pharmacy Suggested Resource Web Sites  
Resources for Information on Quality Improvement and Developed Health Care Measures

**CHAPTER 8: REIMBURSEMENT FOR THE PHARMACIST IN AN AMBULATORY PRACTICE****GOAL:**

- Define the appropriate reimbursement process for your practice including the necessary document and tools.

**TOOLS:**

Coding Reference Card Outpatient  
Pharmacists' Specific Facility Fee Point Sheet  
Sliding Fee Scale  
Patient Intake Form  
Trinity Anticoagulation E/M Documentation Standards

**CHAPTER 9: MAXIMIZING YOUR AMBULATORY PRACTICE: PLANNING FOR THE FUTURE****GOAL:**

- Develop a plan for growth for your clinical services that includes future training of personnel, anticipation of health care changes, and contributions to the profession.

**TOOLS:**

Updated Resources and Reimbursement Form to Show Growth (Form originally introduced in Chapter 2)  
Example Measures to Examine Trends in the Practice  
A Tracking Tool for Non-patient Activities  
Examples of eTOCs  
A Sample Plan for Re-evaluating the Service

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