

PHARMACY CLINICAL COORDINATOR'S HANDBOOK

Lynn Eschenbacher, PharmD, MBA, FASHP

National Director of Pharmacy Operations

The Resource Group, LLC

An Ascension Subsidiary

St. Louis, Missouri

Any correspondence regarding this publication should be sent to the publisher, American Society of Health-System Pharmacists, 7272 Wisconsin Avenue, Bethesda, MD 20814, attention: Special Publishing.

The information presented herein reflects the opinions of the contributors and advisors. It should not be interpreted as an official policy of ASHP or as an endorsement of any product.

Because of ongoing research and improvements in technology, the information and its applications contained in this text are constantly evolving and are subject to the professional judgment and interpretation of the practitioner due to the uniqueness of a clinical situation. The editors and ASHP have made reasonable efforts to ensure the accuracy and appropriateness of the information presented in this document. However, any user of this information is advised that the editors and ASHP are not responsible for the continued currency of the information, for any errors or omissions, and/or for any consequences arising from the use of the information in the document in any and all practice settings. Any reader of this document is cautioned that ASHP makes no representation, guarantee, or warranty, express or implied, as to the accuracy and appropriateness of the information contained in this document and specifically disclaims any liability to any party for the accuracy and/or completeness of the material or for any damages arising out of the use or non-use of any of the information contained in this document.

Director, Special Publishing: Jack Bruggeman

Acquisitions Editor: Robin Coleman

Editorial Project Manager: Ruth Bloom

Production Manager: Kristin Eckles

Cover Design: Carol Barrer and David Wade

Page Design: David Wade

Library of Congress Cataloging-in-Publication Data

Pharmacy clinical coordinator's handbook / [edited by] Lynn Eschenbacher.

p. ; cm.

Includes bibliographical references and index.

ISBN 978-1-58528-478-8

I. Eschenbacher, Lynn, editor. II. American Society of Health-System Pharmacists, issuing body. [DNLM: 1. Pharmacy Administration. 2. Administrative Personnel. 3. Pharmacy Service, Hospital--organization & administration. QV 737.1]

RS100

615.1068:3--dc23

2015033759

© 2016, American Society of Health-System Pharmacists, Inc. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, microfilming, and recording, or by any information storage and retrieval system, without written permission from the American Society of Health-System Pharmacists.

ASHP is a service mark of the American Society of Health-System Pharmacists, Inc.; registered in the U.S. Patent and Trademark Office.

ISBN: 978-1-58528478-8

10 9 8 7 6 5 4 3 2 1

Dedication

This book is dedicated to all of the pharmacy clinical coordinators who have worked tirelessly to develop and provide high-quality pharmacy services. Keep up the great work and strive for your best.

Thank you to my extremely supportive husband, Stephen, and my caring and loving children, Audrey, Madison, and Sloane. You encourage me and inspire me to be the best that I can.

Thank you to ASHP for providing so many opportunities for leadership and to advance our profession to provide the best care possible for our patients. All patients deserve a pharmacist as part of their care, and we need to continue to demonstrate our ability to impact patient care and advocate for our involvement.

Lynn Eschenbacher

Table of Contents

Contributors.....	X
Preface	X
List of Tables and Figures	
1 - Getting Started	
Noelle R. M. Chapman, PharmD, BCPS, FASHP	
2 - Building and Leveraging Key Relationships.....	
Scott Knoer, PharmD, MS, FASHP; Sam Calabrese, BS Pharm, MBA	
3 - P&T Committee, Formulary Management Basics, and Medication-Use Evaluations.....	
Bob Lobo, PharmD; Mark Sullivan, PharmD	
4 - Finance: Focusing on the Bottom Line	
Robert P. Granko, PharmD, MBA	
5 - Medication Safety Essentials for the Clinical Coordinator	
Lynn Eschenbacher, PharmD, MBA, FASHP	
6 - Accreditation, Medication Management, and the Clinical Coordinator	
Trista Pfeiffenberger, PharmD, MS	
7 - Human Resources and People Management	
Jennifer Burnette, PharmD	
8 - Staff Development: 10 Factors to Guide Performance	
Jean Douglas, PharmD	
9 - Development and Assessment of Competency.....	
Lynn Eschenbacher, PharmD, MBA, FASHP; Rhonda Zillmer, PharmD	
10 - Strategic Planning and Project Management	
Jennifer M. Schultz, PharmD, FASHP	
11 - Implementing New Clinical Pharmacy Programs—Step-by-Step.....	
Jenna Huggins, PharmD, BCPS-AQ Cardiology; Laurimay Laroco, PharmD	
12 - Programs That Work: Clinical Pharmacy Services 101.....	
Carrie A. Berge, PharmD, MS; Steven S. Carlisle, PharmD, BCPS	
13 - Evaluation and Monitoring of Clinical Interventions.....	
Kate M. Schaafsma, PharmD	
14 - Leadership from the Clinical Coordinator’s Perspective.....	
David Hager, PharmD, BCPS	
15 - Incorporating Students and Residents into It All	
Antonia Zapantis, PharmD, MS, BCPS	
16 - Putting It All Together: The Effective Clinical Coordinator.....	
Lynn Eschenbacher, PharmD, MBA, FASHP	
Index	X

Contributors

Carrie A. Berge, PharmD, MS

Parkland Hospital
Dallas, Texas

Jennifer Burnette, PharmD

Miami, Florida

Samuel Calabrese, BS Pharm, MBA

Cleveland Clinic
Sagamore Hills, Ohio

Steven S. Carlisle, PharmD, BCPS

Parkland Hospital
Dallas, Texas

Noelle R. M. Chapman, PharmD, BCPS, FASHP

Northwestern Memorial Hospital
Chicago, Illinois

Jean Douglas, PharmD

Greensboro, North Carolina

Lynn Eschenbacher, PharmD, MBA, FASHP

National Director of Pharmacy Operations
The Resource Group, LLC
An Ascension Subsidiary
St. Louis, Missouri

Robert P. Granko, PharmD, MBA

Associate Director of Pharmacy
Moses H. Cone Memorial Hospital
Greensboro, North Carolina
Adjunct Associate Professor
Division of Practice Advancement and Clinical
Education
University of Carolina
Eshelman School of Pharmacy
Chapel Hill, North Carolina

David Hager, PharmD, BCPS

University of Wisconsin
Madison, Wisconsin

Jenna Huggins, PharmD, BCPS-AQ Cardiology

WakeMed Health & Hospitals
Raleigh, North Carolina

Scott Knoer, PharmD, MS, FASHP

Cleveland Clinic
Medina, Ohio

Laurimay Laroco, PharmD

WakeMed Health & Hospitals
Raleigh, North Carolina

Bob Lobo, PharmD

Vanderbilt University
Nashville, Tennessee

Trista Pfeifferberger, PharmD, MS

Director, Network Pharmacy Programs
& Pharmacy Operations
Community Care of North Carolina
Raleigh, North Carolina

Kate M. Schaafsma, PharmD

Froedtert & Medical College of Wisconsin
Milwaukee, Wisconsin

Jennifer M. Schultz, PharmD, FASHP

Bozeman Deaconess Hospital
Bozeman, Montana

Mark Sullivan, PharmD, MBA, BCPS

Vanderbilt Hospital Pharmacy
Nashville, Tennessee

Antonia Zapantis, PharmD, MS, BCPS

Associate Professor

Director of Experiential Education

Nova Southeastern University

Fort Lauderdale, Florida

Rhonda Zillmer, PharmD

WakeMed Health & Hospitals

Raleigh, North Carolina

Preface

The pharmacy clinical coordinator is a valuable member of the healthcare team. If you are an experienced clinical coordinator, this book will help enhance your practice. If you are just starting on your journey as a pharmacy clinical coordinator, this book can be your step-by-step guide to succeeding in this essential and demanding position. There is much to learn and master to be an effective and high-performing pharmacy clinical coordinator. First, *clinical* is just the start. You have discovered, or soon will discover, that you are also a coach, mentor, innovator, visionary, and an expert in human resources, operations, logistics, finance, safety, and risk management. Use this book to help you generate the ideas you will need as a pharmacy leader to impact your staff's lives in a positive way and ensure optimal patient care outcomes.

The *Pharmacy Clinical Coordinator's Handbook* will be your guide for practical tools and tips on just about everything related to being a pharmacy clinical coordinator or clinical manager. We have brought together top experts from our profession to provide you with real-life, practical information. The tone of the book is conversational, as if you had one of these experts sitting right with you all the time providing knowledge and expertise just for you. We hope this book will be the go-to resource for coordinators or managers who want to take their practice to the next level and make a difference in healthcare and patient care.

Have you ever asked these questions as a clinical coordinator?

- Who should I get to know in my organization so that if I need something I have already developed that relationship?
- How does pharmacy provide value to the healthcare team?
- How do I build my team and inspire them to achieve high-quality outcomes for patient care?
- What can I do to advance practice?
- There is so much to do. Where do I start, and how do I even know what to do?
- I have been a coordinator for many years. Is there more that I can do?

We have provided answers to all of these questions and many more. The book includes many charts, checklists, protocols, processes, diagrams, references, and websites for you to generate ideas on how you can improve what you are doing and how you can impact your team.

Enjoy what you do as a clinical coordinator or clinical manager. You are in a position in which you can positively impact the lives of your staff as well as the patients that you serve. Being in middle management can be tough, but if you have a clear vision and strategy and set clear expectations for your team members and hold them accountable, you can achieve anything!

If your actions inspire others to dream more, learn more, do more and become more, you are a leader.

—John Quincy Adams

I shall pass this way but once; any good that I can do or any kindness I can show to any human being; let me do it now. Let me not defer nor neglect it, for I shall not pass this way again.

—Stephen Grellet, Quaker Missionary

These two quotes will help you remember the great power that you have as a clinical coordinator to do your best and to lead others to do their best. Our patients count on us as pharmacists to touch their lives in such a way that they either stay healthy or get better as a result of our involvement.

Go forward, and do great things for yourself, your employees, and your patients.

Lynn Eschenbacher

List of Tables and Figures

Chapter 1. Getting Started

Figure 1-1. Delegation Flow Chart

Figure 1-2. Idealized Time Balance Chart

Figure 1-3. Realistic Time Balance Chart

Table 1-1. Skill Assessment Chart

Chapter 2. Building and Leveraging Key Relationships

Table 2-1. Empowering and Disempowering Words

Chapter 3. P&T Committee, Formulary Management Basics, and Medication-Use Evaluations

Figure 3-1. Sample P&T Committee Meeting Agenda

Figure 3-2. Sample SBAR

Figure 3-3. Sample Charter

Figure 3-4. Sample Nonformulary Request Form

Figure 3-5. Sample Format P&T Committee Formulary Monograph

Figure 3-6. Process for Handling Nonformulary Drug Requests

Figure 3-7. SAFE Tool

Figure 3-8. SAFE Tool Scoring System

Figure 3-9. Example of MUE Ideas Submitted To P&T Committee

Figure 3-10. MUE Presentation Template

Chapter 4. Finance: Focusing on the Bottom Line

Figure 4-1. Sample Typical Budget Schedule

Figure 4-2. Common Internal Benchmarking Productivity Monitoring Ratios

Chapter 5. Medication Safety Essentials for the Clinical Coordinator

Figure 5-1. IRS Document Template

Figure 5-2. ISMP Quarterly Action Agenda

Figure 5-3. ISMP Self-Assessment

Figure 5-4. Joint Commission Sentinel Event Gap Analysis

Chapter 6. Accreditation, Medication Management, and the Clinical Coordinator

Figure 6-1. Medication Management Checklist for Sweeps

Appendix 6-A. Medication Areas Inspection Form

Appendix 6-B. Medication Management Mock Survey Tracer

Chapter 7. Human Resources and People Management

Figure 7-1. Your Style Under Stress Test

Figure 7-2. Score Sheet for Style Under Stress Assessment

Figure 7-3. 10-Minute Daily Huddles

Figure 7-4. Weekly Huddle Communications

Figure 7-5. How Do You Like to Be Recognized?

Chapter 8. Staff Development: 10 Factors to Guide Performance

Figure 8-1. Ten Performance Factors

Figure 8-2. Basic Career Options for Pharmacists

Table 8-1. Clinical Pharmacist Major Work Activities in an Integrated Practice Model

Table 8-2. Example of Writing a Goal with Specific Steps to Achieve an MWA

Table 8-3. Summary of Lencioni's Five Dysfunctions of a Team

Chapter 9. Development and Assessment of Competency

Figure 9-1. Balance Scorecard

Figure 9-2. Educational Plan

Figure 9-3. Sample Questions for an Educational Needs Assessment

Figure 9-4. Pharmacokinetic Questions

Figure 9-5. What Would You Do?

Figure 9-6. Observational/Side-by-Side Assessment Example

Figure 9-7. Annual Competency Checklist example

Figure 9-8. Demonstration of Skills Assessment Checklist

Chapter 10. Strategic Planning and Project Management

Figure 10-1. Sample Charter

Figure 10-2. Initiative Review Session Form

Figure 10-3 Performance Improvement Project Planning Form

Table 10-1. Environmental Assessment

Table 10-2. Organization Strategic Plan

Table 10-3. Pharmacy Department Strategic Plan 2014–2016

Table 10-4. Pharmacy Project List Year

Table 10-5. Characteristics of Our Leaders

Table 10-6. A Chair's How-To-Guide

Table 10-7. Project Team Roles and Responsibilities

Chapter 11. Implementing New Clinical Pharmacy Programs—Step by Step

Figure 11-1. Overall Flow Diagram in the Creation of a New Pharmacy Service

Figure 11-2. Sample Benchmarking Checklist

Figure 11-3. Example SWOT Analysis for Code Blue Response

Figure 11-4. Elements of the Layout of a Business/New Pharmacy Service Plan

Figure 11-5. Hard Versus Soft Savings (Cost Avoidance)

Figure 11-6. Financial Planning

Figure 11-7. Communication Checklist of New Pharmacy Service

Chapter 12. Programs That Work: Clinical Pharmacy Services 101

Table 12-1. Checklist for Creation of a TDM Program

Table 12-2. Examples of TDM Information and Decision Support Resources

Table 12-3. Recommended External Sites for Anticoagulation Service Resources

Table 12-4. Resource and Toolkits for Transitions of Care

Chapter 13. Evaluation and Monitoring of Clinical Interventions

Figure 13-1. 5W2H Problem Definition Tool —Example: Completing Medication Reconciliation

Figure 13-2. Process Map Development

Figure 13-3. Process Map Development—Example: Pharmacist Warfarin Dosing

Figure 13-4. SIPOC Diagram

Figure 13-5. SIPOC Diagram—Example: Process a Medication Order

Figure 13-6. Examples of Pharmacist-Driven Clinical Interventions to Create Value

Figure 13-7. Stakeholder Analysis Template—Example: Pharmacist Discharge Reconciliation

Figure 13-8. Value Proposition Example—Medication Reconciliation

Figure 13-9. Pareto Analysis—Incomplete Intravenous to Oral Conversions

Figure 13-10. Histogram—Type of Medication Errors

Figure 13-11. Control Chart—Average Discharge Prescription Capture per Week

Figure 13-12. Clinical Intervention Monitoring Scorecard

Table 13-1. Work Measurement Table

Table 13-2. Clinical Intervention Measurements—Example: Code Response

Table 13-3. Data Collection Plan—Medication Reconciliation

Table 13-4. Control Plan— Example: Medication Reconciliation

Chapter 14. Leadership from the Clinical Coordinator's Perspective

Figure 14-1. Evolution of Priorities Through a Career

Figure 14-2. Kotter's Eight-Step Change Management Process

Figure 14-3. DiSC Assessment Model

Table 14-1. How to Determine Priorities

Table 14-2. Time Study for Coordinators Form

Table 14-3. Distinguishing Self-Promotion from Selfless Promotion

Chapter 15. Incorporating Students and Residents into It All

Table 15-1. Types of Services

Table 15-2. By-products of Pharmacy Extenders

Table 15-3. Topics to Cover During Orientation

Table 15-4. Mapping Goals to Learning Activities

Figure 15-1. Layers of Learning with Respective Goals

Appendix 15-1. Sample Yearly Schedule

Appendix 15-2. Sample APPE Calendar

Chapter 16. Putting It All Together: The Effective Clinical Coordinator

n/a