

# **OUTSOURCING (COMPOUNDING) PHARMACY TECHNICIAN (Competency-Based)**

## **APPENDIX A**

O\*NET CODE 29-2052.00

This training outline is a minimum standard for Work Processes and Related Instruction. Changes in technology and regulations may result in the need for additional on-the-job or classroom training.

Job Titles: I. Claims Processing Technician; II. Pharmacy Communications Technician; III. Laboratory Technician; IV. Pharmacy Medical Equipment Technician.

### **WORK PROCESSES**

#### **A. Workplace and Safety Orientation**

1. Learn and employ Standard Operating Procedures (SOPs) particular to each technician role.
2. Take any relevant cultural sensitivity/awareness training.
3. Ensure patient confidentiality by learning, understanding, and applying the rules of the Health Insurance Portability and Accountability Act (HIPAA).
4. Work safely around equipment, materials, and co-workers.
5. Acquire familiarity with basics of Section 503 of Food, Drug, and Cosmetic Act.
6. Become familiar with and use Customer Relationship Management (CRM) Databases, such as PrimerX.

#### **B. Data Entry/Order Origination – Claims Processing Technician**

1. Receive prescriptions electronically and enter data into CRM databases.
2. Troubleshoot errors in demographic information by contacting patient and/or physician.
3. Identify prescriptions containing controlled substances and direct to insurance verification team (advanced claim processing) for processing.
4. Learn and employ 5 methods of originating:
  - a. New to bill;
  - b. No insurance information;
  - c. Refills;

- d. Futures;
- e. Switches.

**C. Prescription Claim Processing – Claims Processing Technician**

1. Learn details of various insurance plans.
2. Research, locate, and navigate individual formularies.
3. Become familiar with different kinds of rejections.
4. Understand patient's eligibility and plan requirements.
5. Gather documentation in effort to obtain coverage for patients.
6. Act as liaison between insurance, physician, and patient.

**D. Advanced Claim Processing – Claims Processing Technician**

1. Obtain prior authorization through multi-step process, including but not limited to:
  - a. Step 1 -identify criteria for insurance coverage;
  - b. Step 2 – get clinical data from physician(s)/office(s) and necessary supporting documentation (e.g., International Classification of Disease (ICD)- 10 Codes, previous treatment diagnosis, lab work, etc.);
  - c. Step 3 – work with clinical team to prepare prior authorization forms;
  - d. Step 4 – obtain and submit signed forms;
  - e. Step 5 – follow up and liaise between physicians and plan sponsors;
  - f. Step 6 – communicate with patient throughout process;
  - g. Step 7 – complete process, whether denial or approval and subsequent claim processing.

**E. Basic Treatment Work and Telephone Use – Pharmacy Communications Technician**

1. Establish a baseline, i.e., level of treatment to be administered, by soliciting responses to a battery of questions regarding drug interactions, contraindications, allergies; set treatment goals.
2. Price medication: compute on an individual basis based on quantity of ingredients, individual cost and volume of ingredients, effort level required to produce medication, and delivery requirements.

## **F. Monitoring Treatment – Pharmacy Communications Technician**

1. Assessing compliance.
2. Counsel with clinicians.
3. Encourage adherence to treatment plan.
4. Measure progress towards goal.
5. Work with clinical team to revise treatment plan (if necessary).

## **G. Advanced Treatment Work – Pharmacy Communications Technician**

1. Establish a baseline for rare, more complicated disease states.
2. Work with clinical team to investigate and assess disenrollment.

## **H. Drug Material Selection – Laboratory Technician**

1. Work with inventory to:
  - a. locate and pull material, such as vehicle (e.g., lotion) for active and inactive ingredients;
  - b. fill bins/carts with drugs; validate National Drug Code (NDC) from database.
2. Use database (e.g., CRM) to assist with pulling master formulations, ingredients, and equipment needed to manufacture medication.
3. Stage medication for pharmacist to weigh active ingredients.
4. Validate expired drugs and dispose per procedure.
5. Handle, maintain, and clean equipment per procedure (partial list of equipment in Appendix B).

## **I. Reducing Particle Size – Laboratory Technician**

1. Prepare mixing and milling equipment for use.
2. Mill material per procedure, including compound pouring and particle size selection.
3. Clean equipment after use per SOP; follow discard procedures; maintain proper work uniform.

## **J. Packing, Containerization, and Shipping – Laboratory Technician**

1. Package medications for shipping.

2. Handle hazardous preparations and packages per procedure, including but not limited to: dry ice, temperature validation, temperature indicator card packaging.
3. Notify patients of expected delivery and any anticipated delays.
4. Track packages to confirm delivery.

**K. Triage and Order Management – Laboratory Technician**

1. Coordinate lab room workflow; assign order priority utilizing customer database; coordinate process flow for compounding production line.

**L. Durable Medical Equipment – Pharmacy Medical Equipment Technician**

1. Learn to operate a workflow management system; understand and explain an order’s “life cycle.”
2. Enter information into databaes(s) with patient profiles.
3. Collect necessary documentation and ready for submission.
4. Handle basic inquiries, including delivery dates and equipment specifications.

**M. Authorization Preparation – Pharmacy Medical Equipment Technician**

1. Gather information from physicians, such as lab work and patient profile.
2. Provide customer service to patients, and attempt to resolve problems when possible.
3. Communicate with warehouse and logistics team, orally and via workflow management system.
4. Review insurance claims; intake, resolution, reconciliation, denials, and rejections.
5. Acquire basic billing knowledge, using appropriate software.

**Approximate Total Hours            1000-2000**

**Apprentices in Competency-Based Programs shall participate in no fewer than 1,000 documented hours of on-the-job training, and until they have demonstrated competency for each Work Process on the Training Outline.**

*Apprenticeship work processes are applicable only to training curricula for apprentices in approved programs. Apprenticeship work processes have no impact on classification determinations under Article 8 or 9 of the Labor Law. For guidance regarding classification for purposes of Article 8 or 9 of the Labor Law, please refer to <https://dol.ny.gov/public-work-and-prevailing-wage>.*

# OUTSOURCING (COMPOUNDING) PHARMACY TECHNICIAN

## APPENDIX B

### RELATED INSTRUCTION

#### **Safety, Health, and the Workplace**

1. General Workplace Safety and Infection Control
2. First Aid/CPR (minimum 6.5 hrs)
3. Personal Protective Equipment (PPE)
4. Right-to-Know/Safety Data Sheets (SDS)
5. Lockout/Tagout (where appropriate)
6. Food and Drug Administration (FDA) Regulations
7. HIPAA and Patient Confidentiality
8. Sexual Harassment Prevention Training – must comply with Section 201-g of the Labor Law

#### **Trade Theory and Skills**

1. Anatomy & Physiology/Medical Terminology
2. Trade Math & Measurements
3. Basic Pharmacology
4. Customer Service Skills
5. Telephone Systems
6. Computer Fundamentals
7. Introduction to Customer Relationship Management (CRM) Databases-**All Apprentices**
8. Basic Medical Coding
9. Basic Medical Billing
10. Laboratory Equipment
11. Mixing, Packaging, and Shipping Pharmacy Materials
12. Additional Courses As Necessary

At least 144 hours of Related Instruction per year must be available for the apprentice at the time of his/her indenture. However, the apprentice may test out earlier if able to demonstrate competence for each topic on the Related Instruction outline.

Appendix B topics are approved by New York State Education Department.