

# CPS

NCPA<sup>®</sup>  
NATIONAL COMMUNITY  
PHARMACISTS ASSOCIATION

**Growth. Performance. Success.**

**2024 ANNUAL CONVENTION**



# Take 5

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**NCPA 2024 Annual Convention and Expo**

Columbus, Ohio

# Disclosure Statement

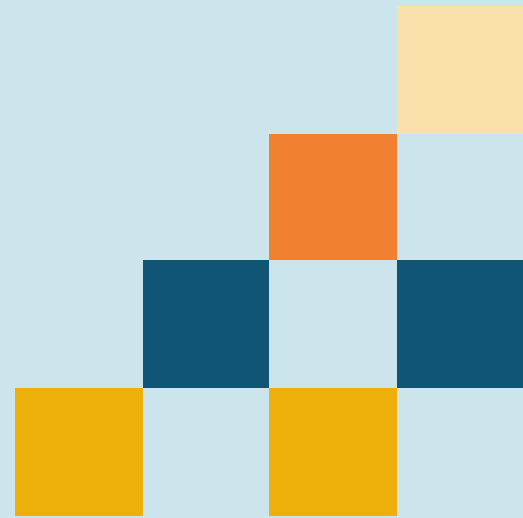
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# Pharmacist and Technician Learning Objectives

1. Discuss strategies for using technology to enhance team communication.
2. Review opportunities for engaging pharmacy fellows/residents to enhance their training experience.





# Take 5: Implementation of Microsoft Teams

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**NCPA 2024 Annual Convention and Expo**

Columbus, Ohio



# Speakers



**Lucas Haugh**

Operations Manager

City Drug, Cheyenne Wyoming



**Kelsey James**

Owner/ Pharmacist-In-Charge

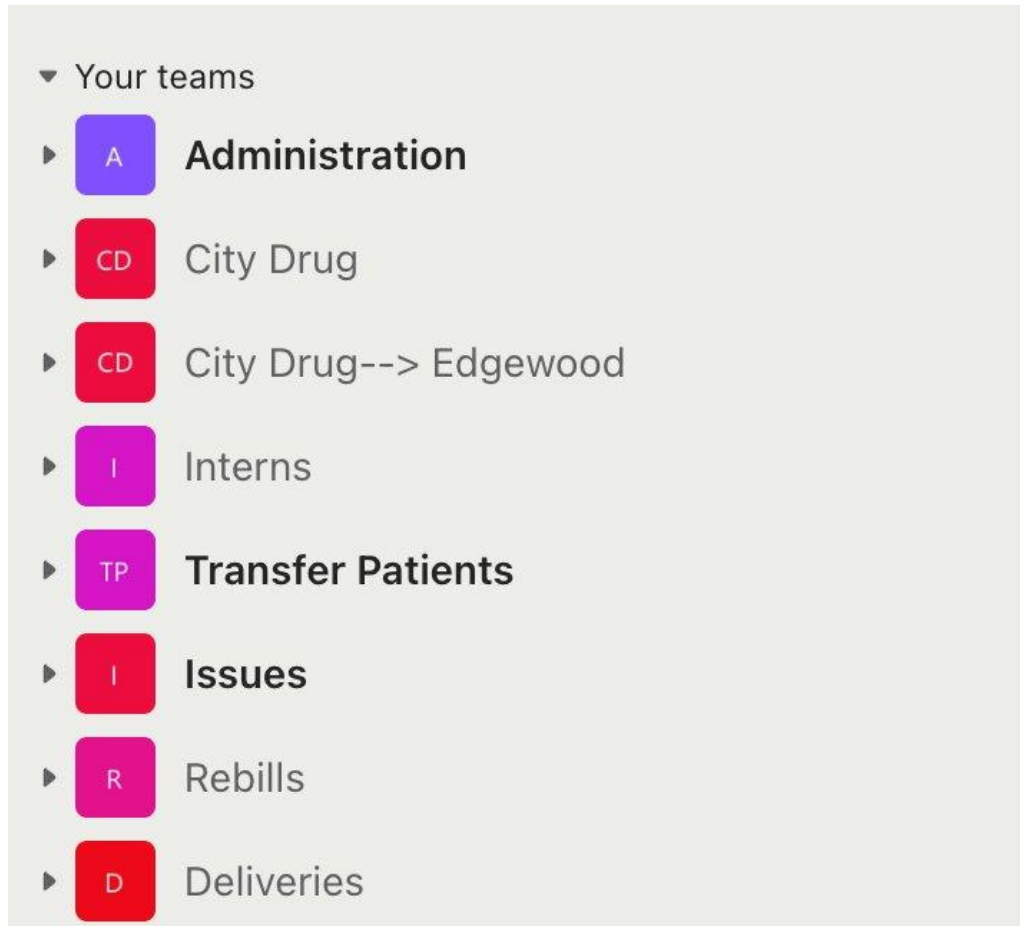
City Drug, Cheyenne Wyoming

# Microsoft Teams

- A subscription-based software provided by Microsoft that is designed to enhance collaboration through chat, video, file storage, and application integration.
- Microsoft Office 365 Integration includes:
  - Word
  - Excel
  - PowerPoint
  - SharePoint
  - And more



# Microsoft Teams Applied to Pharmacy



- Deliveries
- Integration of outside agencies
  - Hospice
  - Accountants
  - Legal Team
  - Marketing
- Med Sync collaboration
  - Improved workflow
- Audits
- Human Resources
  - Scheduling
  - Performance Evaluations
  - Surveys



# Deliveries

**Afternoon Shift** | Grid | Board | Schedule | Charts | Filters (2) | Group by Bucket

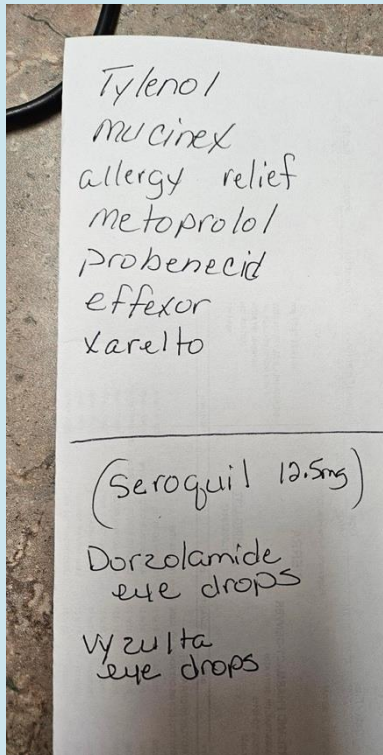
South	North	East	West
+ Add task	+ Add task	+ Add task	+ Add task
<input type="radio"/> Patient 1	<input type="radio"/> Patient 3	<input type="radio"/> Patient 4	<input type="radio"/> Patient 5
<input type="radio"/> Patient 2			



**Afternoon Shift** | Grid | Board | Schedule | Charts | Filters (2) | Group by Bucket

City Drug (D)	Given To Morning Drivers	Needs Attention	Delayed (Specify Date to be Delivered)
+ Add task	More Options + Add task	+ Add task	+ Add task
		<input type="radio"/> Patient 7 - Not home on 10/14	<input type="radio"/> Patient 8 - On vacation until 10/28
		<input type="radio"/> Patient 6 - Need to collect payment prior to delivery	

# Integration With Outside Agencies



PATIENT NAME	DOB	MED	DOSE	LAST DAY	STATUS	ISSUES
[REDACTED]	12/18/1933	Aspirin	81mg		OUT FOR DELIV...	
[REDACTED]	6/29/1936	Senna	8.6mg		OUT FOR DELIV...	
[REDACTED]	6/29/1936	Quetiapine	12.5mg		OUT FOR DELIV...	
[REDACTED]	12/18/1933	CBD Gummies Refresh PM Lubricant Eye Ointment-0040178- 04		9/12/2024	ISSUE	
[REDACTED]	7/16/1929	Eliquis	2.5mg		ISSUE	INSURANCE REJ...
[REDACTED]	7/16/1929	Oxybutynin Chloride	5mg		ISSUE	ISSUE - SEE CO...
[REDACTED]	6/29/1936	Seroquel-please cut 25mg tablet in half if possible	12.5mg BID		IN PROGRESS	ISSUE - SEE CO...
[REDACTED]	10/31/1942	Potassium Chloride Text	10 Meg		IN PROGRESS	
[REDACTED]	6/29/1936	Multivitamin			DELIVERY COM...	
[REDACTED]	1/29/1949	Naproxen	220mg		DELIVERY COM...	
[REDACTED]	10/31/1942	Aripiprazole	5mg		DELIVERY COM...	
[REDACTED]	1/29/1949	Aleve	220 MG		DELIVERY COM...	
[REDACTED]	3/24/1936	Sertraline	50mg		DELIVERY COM...	
[REDACTED]	10/16/1930	Hydrochlorothiazide	25mg		DELIVERY COM...	
[REDACTED]	10/16/1930	Quetiapine	25mg		DELIVERY COM...	
[REDACTED]	8/11/1941	Aripiprazole Tablet	2mg		DELIVERY COM...	
[REDACTED]	8/11/1941	Furosemide	40mg		DELIVERY COM...	
[REDACTED]	12/18/2024	Lovastatin Tablet	20mg		DELIVERY COM...	

### New item

<input type="text" value="Enter value here"/>	<input type="text" value="Enter value here"/>	<input type="text" value="Enter value here"/>
<input type="text" value="Enter value here"/>	<input type="text" value="Enter a name or email address"/>	<input type="text" value="Enter a date"/>
<input checked="" type="checkbox"/> CONTROLLED SUBSTANCE	<input type="text" value="Enter value here"/>	<input checked="" type="checkbox"/> METHOD
<input checked="" type="checkbox"/> STATUS	<input type="text" value="Enter value here"/>	<input checked="" type="checkbox"/> E-SIGNED
<input type="text" value="Enter value here"/>	<input type="text" value="Enter value here"/>	<input checked="" type="checkbox"/> E-SCRIPT RECEIVED
<input type="text" value="Enter value here"/>	<input type="text" value="Enter value here"/>	

# Med Sync

RXMedSync ☆

Title	PATIENT ...	PATIENT ...	PATIENT ...	START DA...	SPECIFIC...	PAYMENT...	DELIVERY...	DAY SUP...	MEDICATI...	MEDICATI...	PRN NOT...	PICK-UP...
Patient 1	HIGH	CONTROL	HIGH	August 17	PATIENT WOULD LIKE TO REQUEST ALL OTHER MEDS THAT ARE NOT SYNC MEDS	ALL 6 SYNC MEDS RUN THROUGH WORKERS COMP	30 DAY SUPPLY - EXCEPT PRN MEDS	OXYCODONE METHOCARBAMOL GABAPENTIN SENNA PLUS LINZESS MORPHINE	CONTROLLED SUBSTANCES WILL NEED NEW RXS EVERY MONTH	ALL OTHER MEDS ON PROFILE ARE 90DS AS NEEDED	DELIVERY	
Patient 2	LOW	NON-CONTROL	LOW	August 13	NONE		30 DAY SUPPLY	SIMVASTATIN ALENDRONATE MELOXICAM			PICK UP	
Patient 3	LOW	NON-CONTROL	HIGH	September 1	NONE		30 DAY SUPPLY	Rosuvastatin Farxiga Lisinopril Metoprolol Ozempic Glipizide ER 5mg (1am and 2pm)			PICK UP	
Patient 4	LOW	NON-CONTROL	LOW	August 16			90 DAY SUPPLY	FOLIC ACID METOPROLOL METHOTREXATE METFORMIN ESOMEPRAZOLE ATORVASTATIN ROPINIROLE BUPROPION			DELIVERY	
Patient 5	LOW	NON-CONTROL	LOW	August 11			30 DAY SUPPLY	PRAZOSIN EZETIMIBE ATORVASTATIN AMLODIPINE CELEBREX TAMSULOSIN GEMFIBROZIL GABAPENTIN LISINAPRIL		TRAMADOL IS ONLY PRN MED	PICK UP	

- Calendar Automation
- User Friendly
- Collaboration Amongst All Staff

# Med Sync

## Patient 1

### Title

Patient 1

PATIENT TYPE (do they have controlled substances on sync or not?)

CONTROL

### SPECIFIED PATIENT NOTES

PATIENT WOULD LIKE TO REQUEST ALL OTHER MEDS THAT ARE NOT SYNC MEDS

DELIVERY DATE NOTES (i.e. any issues with delivery)

Enter value here

### MEDICATIONS

OXYCODONE  
METHOCARBAMOL  
GABAPENTIN  
SENNAPLUS...  
LINZESS

[See more](#)

PRN NOTES (ANY NOTES ABOUT PRN MEDS)

ALL OTHER MEDS ON PROFILE AR...

START DATE

August 17

PATIENT DIFFICULTY (are their medications complicated? is the patient complicated?)

HIGH

PATIENT MED COST (higher than \$500 OUR cost)

HIGH

PAYMENT NOTES (anything we need to know about insurance or accounts, etc.)

ALL 6 SYNC MEDS RUN THROUG...

DAY SUPPLY NOTES

30 DAY SUPPLY - EXCEPT PRN...

MEDICATION NOTES (any notes about their sync meds)

CONTROLLED SUBSTANCES WILL NEED NEW RXS EVERY MONTH

PICK-UP/ DELIVERY

DELIVERY

Today ↑ ↓ October 2024 View Events

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Sep 29	30	Oct 1	2	3	4	5
6	7	8	9	10	11	12
13	Oct 14	15	16 Patient 1 Patient 5	17	18 Patient 2 Patient 7	19 Patient 8
20	21	22 Patient 3	23	24	25 Patient 4	26 Patient 13 Patient 6
27 Patient 12	28 Patient 14	29	30 Patient 15 Patient 9	31	Nov 1	2

# Audits

- Track deficiencies
- Maintain Compliance
- Retain Revenue

Audit Tracker ☆

INSURANCE COMPANY ▾ INITI... ↑ ▾ DUE DAT... ▾ NOTES ▾ TASKS ▾ ORGANIZ... ▾ SEND TO ... ▾ IDENTIFIE... ▾ MAKE AN... ▾ REVIEW A... ▾ AUDIT C... ▾ DISPUTE ... ▾ + Add column

INSURANCE COMPANY	INITI...	DUE DAT...	NOTES	TASKS	ORGANIZ...	SEND TO ...	IDENTIFIE...	MAKE AN...	REVIEW A...	AUDIT C...	DISPUTE ...	+
ELIXIR	6/5/2024 12:00 AM	6/6/2024 12:00 AM			COMPLETE	COMPLETE	N/A	COMPLETE	EMAIL	COMPLETE		
EXPRESS SCRIPTS	6/5/2024 12:00 AM	6/6/2024 12:00 AM			COMPLETE	COMPLETE	N/A	COMPLETE	EMAIL	COMPLETE		
CVS Health	6/14/2024 12:00 AM	7/16/2024 12:00 AM	N/A		COMPLETE	COMPLETE	N/A	COMPLETE	MAIL HARD COPY	COMPLETE		
PRIME THERAPEUTICS	6/26/2024 12:00 AM	7/10/2024 12:00 AM			COMPLETE	COMPLETE	N/A	COMPLETE	FAX	COMPLETE: NEEDS D	8/22/2024	
OPTUM RX	6/27/2024 12:00 AM	7/4/2024 12:00 AM			COMPLETE	COMPLETE	N/A	COMPLETE	FAX	COMPLETE		
OPTUM RX	8/19/2024 12:00 AM	8/24/2024 12:00 AM	This prescription has not been run through insurance correctly as it was reversed. We will need to delegate a task for a technician or pharmacist to follow up with this with the insurance company as this audit is due to be returned 8/24. The staff members need to contact the insurance company and show that this is not a paid claim currently, OR find out the issue, run the claim correctly, and dispense this to the patient as soon as possible. Please let me know if I need to provide further information for this to be taken care of.	- CONTACT INSURANCE COMPANY -PROVE ITS NOT A PAID CLAIM -DISPENSE TO PATIENT AFTER COMPLETE	COMPLETE	NOT REQUIRED	N/A	NOT REQUIRED	FAX	COMPLETE		

# Audits

## OPTUM RX

### INSURANCE COMPANY

OPTUM RX

### DUE DATE OF AUDIT

8/24/2024 12:00 AM

### SEND TO PAAS

NOT REQUIRED

### MAKE ANNOTED CHANGES

NOT REQUIRED

### AUDIT COMPLETE

COMPLETE

### NOTES

This prescription has not been run through insurance correctly as it was reversed. We will need to delegate a task for a technician or pharmacist to follow up with this with the insurance company as this audit is due to be returned 8/24. The staff members need to contact the insurance company and show that this is not a paid claim currently, OR find out the issue, run the claim correctly, and dispense this to the patient as soon as possible. Please let me know if I need

### INITIAL DATE OF REQUESTED AUDIT

8/19/2024 12:00 AM

### ORGANIZE INFORMATION ACCORDINGLY

COMPLETE

### IDENTIFIED PAAS CHANGES

N/A

### REVIEW AUDIT FOR METHOD OF DELIVERY TO INSURANCE COMPANY

FAX

### DISPUTE DUE DATE

Enter value here

### TASKS

- CONTACT INSURANCE COMPANY
- PROVE ITS NOT A PAID CLAIM
- DISPENSE TO PATIENT AFTER COMPLETE

## Audit Tracker ☆

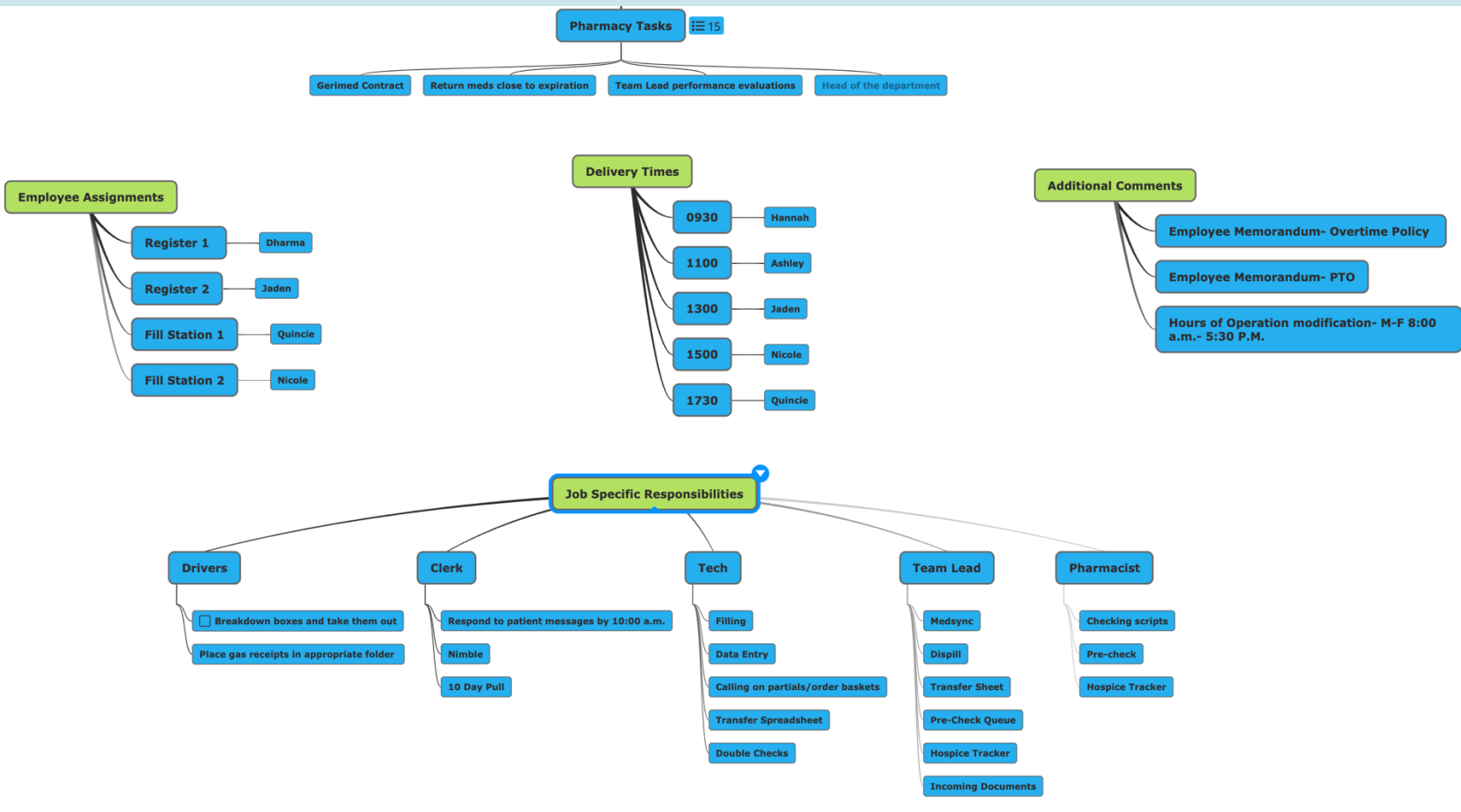
Today ↑ ↓ July 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Jun 30	Jul 1	2	3	4 12 AM OPTUM RX	5
7	8	9	10 12 AM PRIME THERAPEUTICS	11	12
14	15	16 12 AM CVS Health	17	18	19
21	22	23	24	25	26



# Human Resources

- Daily Operation
- Performance Evaluations
- Training Management
- Establish Goals and Monitor Progress



# Human Resources

Reviews about me [Reviews about my team](#) All reviews ⓘ

See how it works Resources ⌵ [New review](#)

All reviews ⌵ Start date ⌵ End date ⌵ Group by ⌵ Search review by keyword

**Administrative Review**  
08/21/2024

⚠️ 1 item waiting for your action

[Download all reviews](#) ⓘ

- 0 Waiting for self-review
- 1 Waiting for reviewer
- 0 Waiting to be finalized
- 0 Finalized

0% Completion rate

[Open](#)

**Administrative Review**  
08/21/2024

[Send reminder](#) [Download all reviews](#) ⓘ

- 1 Waiting for self-review
- 0 Waiting for reviewer
- 0 Waiting to be finalized
- 0 Finalized

0% Completion rate

[Open](#)

**Team Lead Quarterly Review (Q2)**

[Download all reviews](#) ⓘ

- 0 Waiting for self-review
- 0 Waiting for reviewer
- 0 Waiting for calibration
- 0 Waiting to be finalized
- 2 Finalized

100% Completion rate

[Open](#)

**Lead Pharmacist Quarterly Review (Q2)**

⚠️ 1 item waiting for your action

[Download all reviews](#) ⓘ

- 0 Waiting for self-review
- 0 Waiting for reviewer
- 1 Waiting for calibration
- 0 Waiting to be finalized
- 0 Finalized

0% Completion rate

[Open](#)

[My goals](#) My team MS Teams groups ⌵ Department ⌵ Company

See how it works Resources ⌵ [New goal](#)

All goals ⌵ Start date ⌵ End date ⌵ Expand all Collapse all Select labels ⌵ Search by owner or...

45% Overall progress [List view](#) [Feed view](#) [User view](#)

36 ○ No status 26 ● On track 0 ● At risk 0 ● Off track 0 ● Closed

Compounding Competencies	Compounding Pro...	100%	On track	Q1 Jan-Mar 2024
Automated Counting Calibration Schedules	Compounding Pro...	75%	On track	Q3 Jul-Sep 2024
Compound Cleaning Logs	Compounding Pro...	75%	On track	Q3 Jul-Sep 2024
Review of Nonsterile Compounding Rules and Regulations Chapter 13	Compounding Pro...	100%	On track	Q1 Jan-Mar 2024
Review of Nonsterile Compounding Training Checklist	Compounding Pro...	100%	On track	Q1 Jan-Mar 2024
QA Program	Compounding Pro...	100%	On track	Q1 Jan-Mar 2024
Review of Compounding Today Database	Compounding Pro...	100%	On track	Q1 Jan-Mar 2024
Nightly Cleaning Log Checklist		100%	On track	Jun 23, 2024
City Drug Annual Training Requirements		0%	No status	Sep 7, 2024
City Drug Certifications - All Staff		0%	No status	Sep 7, 2024



**Compounding Competencies**

Start date: Start of Q1 Jan-Mar 2024

End date: End of Q1 Jan-Mar 2024

Last progress update: March 20, 2024 7:35 PM

Visibility: Public ⓘ

Related groups (optional) ⓘ: City Drug ⌵

Labels: [Compounding Procedu...](#) [+ Add](#)

Parent goal: [+ Add](#)

There are no parent goals related to this goal

Related tasks: [+ Add](#)

There are no tasks related to this goal

Start date: Start of Q1 Jan-Mar 2024

End date: End of Q1 Jan-Mar 2024

Last progress update: March 20, 2024 7:35 PM

Visibility: Public ⓘ

Related groups (optional) ⓘ: City Drug ⌵

Labels: [Compounding Procedu...](#) [+ Add](#)

Parent goal: [+ Add](#)

There are no parent goals related to this goal

Related tasks: [+ Add](#)

There are no tasks related to this goal

Start: 0 Goal: 100

Current value: 100 / 100 [Update Progress](#) [Roll-up from subgoals](#)

Status: ○ ● ○ ○ [Close goal](#)

**Subgoals** [+ Add new](#)

- Hand Washing Competency 100%
- Cleaning and Sanitizing 100%
- Measuring and Mixing 100%
- Proper Use of Equipment and Devices for Nonsterile Products 100%
- Demonstrates Compounding Safety Knowledge 100%
- Garbing 100%
- Control Procedures 100%

[Comments \(1\)](#) [Progress updates \(4\)](#)

# Human Resources

EMPLOYEE TRAINING TRACKER ☆

Filter: All Items + Add view

Title							
10 DAY PULLS	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
ADDING BUBBLE PACKAGE TO PATIENT PROFILE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
CASH DRAWER PROCEDURE		INCOMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
MEDS 2 BEDS PROCEDURE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
PARATA GUIDE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
PROCESSING INSURANCE REJECTIONS	COMPLETE	COMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
DAW TRAINING	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE
SETTING UP PSEUDOEPHEDRINE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
SIG CODES	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	COMPLETE
Required Sterile Compounding CE	COMPLETE	COMPLETE	INCOMPLETE	COMPLETE	NOT MANDATORY	COMPLETE	COMPLETE

A decorative graphic consisting of a grid of colored squares in shades of blue, orange, yellow, and light blue, located in the top-left and top-right corners of the slide.

# Questions?



# Contact Information

## **Lucas Haugh**

Operations Manager, City Drug

[Lucas.Haugh@citydrugcheyenne.com](mailto:Lucas.Haugh@citydrugcheyenne.com)

## **Kelsey James**

Owner, City Drug

[Kelsey.James@citydrugcheyenne.com](mailto:Kelsey.James@citydrugcheyenne.com)



# Take 5: Engaging and Training Your Resident or Fellow

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**NCPA 2024 Annual Convention and Expo**

Columbus, Ohio



# Speaker



**Brittany Sanders, PharmD**

Owner

The Pharmacy at Wellington

Little Rock, AR

# NCPA Innovation Center/CPESN Community Pharmacy Fellowship

- 12-month executive MBA-like program to grow clinical services
- Full time, licensed pharmacist
- 3.5 days would be dedicated to site directed work activities
- 1.5 days would be dedicated to fellowship-directed work activities
  - Applying what they are learning in the virtual classroom
  - 16 modules on innovative topics, from workflow management and medical billing to disease state refreshers on diabetes and asthma

# Fellowship at The Pharmacy at Wellington

- Capstone project
  - Cognivue
    - Assessment tool to address modifiable risk factors sooner
- Streamlining and billing vaccination clinics
- Certified DSME provider with ADCES



# Other Projects and Benefits

- Other Fellow Capstone Projects
  - Expanding a medication synchronization program
  - Starting point-of-care testing services
  - Working on medication-assisted treatment for opioid use disorder
- Benefits
  - Dedicated focus to grow clinical services
  - Generate new revenue streams within your store
  - Networking with industry leaders



Questions?



# Contact Information

**Brittany Sanders, PharmD**

Owner, The Pharmacy at Wellington

[Brittany@thepharmacyatwellington.com](mailto:Brittany@thepharmacyatwellington.com)