The Pharmacy Technician's Role in Improving Customer Service
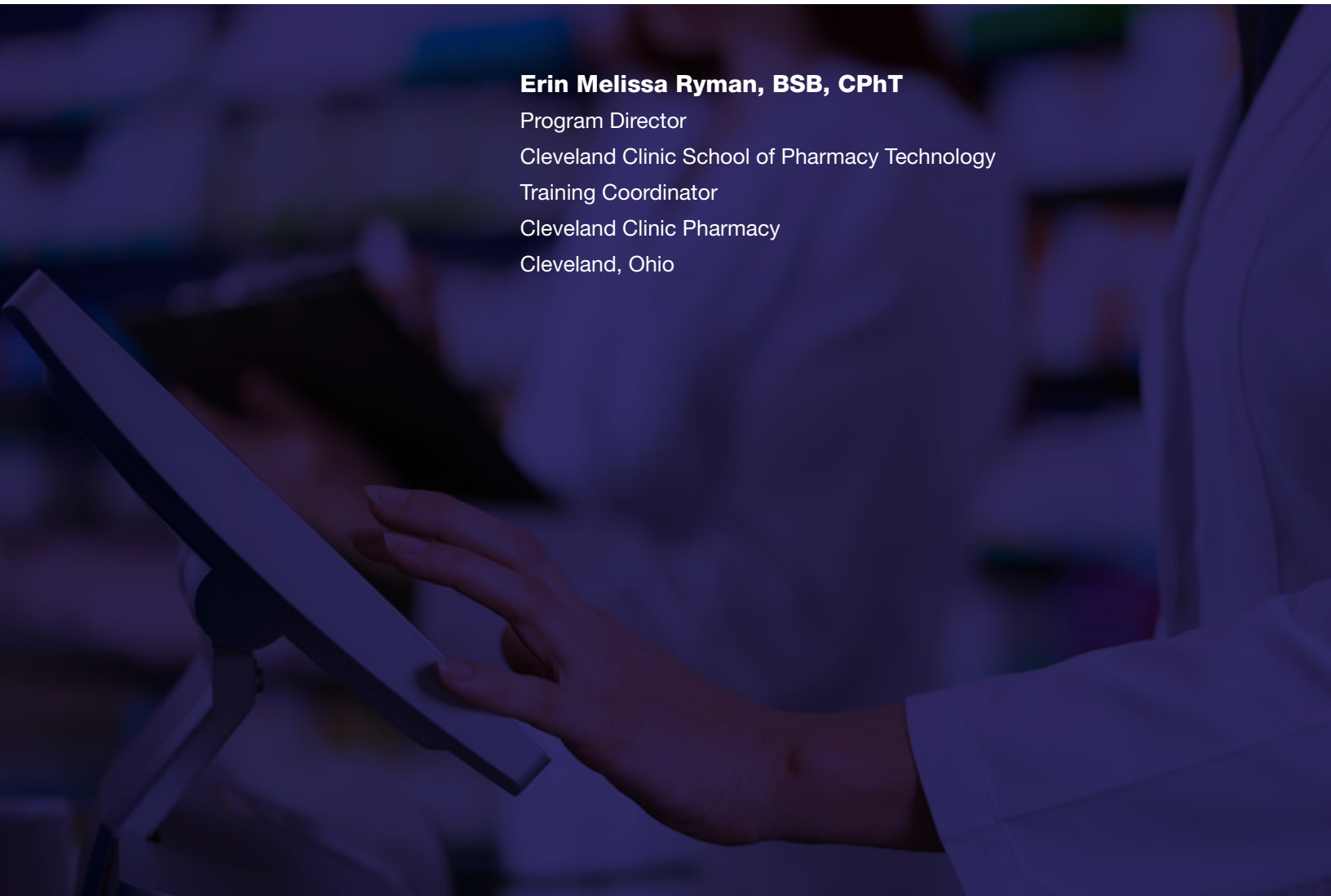
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The Pharmacy Technician's Role in Improving Customer Service

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Target Audience

This continuing pharmacy education series was planned to meet the needs of pharmacy technicians in a variety of settings, and it would be particularly beneficial for pharmacy technicians, supervisors, and educators who are interested in learning about the pharmacy technician's role in improving customer service.

Disclosure Statement

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Executive Summary

All pharmacies have many customers, including patients, pharmacy personnel, and others. This primer on customer service will assist pharmacy technicians in identifying all of the pharmacy's stakeholders or customers. Practical tips for triaging incoming requests to improve customer service will be addressed. Pharmacy technicians will learn how to communicate effectively with difficult and confused customers. Case studies illustrating practical strategies for managing difficult customers will also be described.

Learning Objectives

After studying this knowledge-based activity, participants should be able to

- Identify at least three pharmacy stakeholders or customers.

- Describe ways to triage incoming requests and concerns.

- Describe effective techniques for dealing with difficult customers.

Pharmacy Stakeholders

Stakeholders are the individuals who are affected by customer service. The pharmacy's ultimate stakeholder is the patient who receives the final service. Additional stakeholders include the patient's caregiver, physicians or medical providers, nurses, pharmacists, other technicians, and third-party insurance payers. A breakdown in communication or service at any level within this care team can affect the quality of the patient's health care. While it is important to always put the patient's needs first, pharmacy technicians must consider the needs of all pharmacy customers.

In any pharmacy setting, the technician must work directly with many individuals involved in a patient's care. In an ambulatory or retail setting, much of the technician's customer service is focused on the patients and their families or caregivers. In an inpatient or homecare setting, the focus is on providing service to the nurses or medical providers that work with the patients directly.

Technicians should also provide excellent customer service to their co-workers. Pharmacy functions depend on teamwork, communication, and trust. Pharmacy environments that strive to provide excellent service to each other are more likely to provide good service to external customers.

Technicians enter pharmacy practice to help patients and their families and to support pharmacists, doctors, and nurses. The Golden Rule—"treat others as you would wish to be treated" is a worthy philosophy; however, pharmacy technicians need to take the Golden Rule a step further to the Platinum Pharmacy Rule of Customer Service. The Platinum Rule is to treat others as they wish to be treated. Pharmacy patients come from different socioeconomic backgrounds, cultures, and ethnicities. They have different disease states and varying levels of expectations and needs. Technicians must listen to the patients, their caregivers, and medical providers to understand their needs.

L.A.S.O. Process

Many of the customer service dilemmas that technicians face can be effectively resolved using the LASO process, which focuses on the customer's needs while developing a solution to the request or concern.

- **Listen to the customer.** Rushing to a resolution may make the customer feel unheard or undervalued. Allow the customer to present his or her request or concern in its entirety.

- **Acknowledge what was heard.** Repeat the information back to the customer to validate his or her position before immediately offering resolution.

- **Solve the problem or concern.** This may involve fulfilling a request, involving a pharmacist, making a phone call to an insurance company, or other action. Discuss the plan with the customer and describe the steps that may be required.

- **Own the process.** The technician should provide his or her contact information to the customer, volunteer to provide further assistance, or follow up afterward to ensure timely resolution.

The LASO Process can be applied to almost any pharmacy customer service scenario.

Example In Action:

Ms. Simpson presents to the pharmacy with an empty liquid medication bottle for her 3-year-old son. She requests a refill. The technician realizes that the medication was only to be taken for 14 days and the doctor did not prescribe any refills. The pharmacy filled the medication 10 days ago.

Mother: "Good afternoon. I would like to get a refill for my son's prescription."

Tech: "I'm happy to help you Ms. Simpson. If you look at the bottle though, it appears that your son is out of refills—and he should have enough for another four days."

Mother: "Oh, this is so frustrating. I don't understand why Dr. Jones never provides refills on anything! I'm not even sure if you gave me enough medication! My son has been sick for almost a month with a horrible cough. He's barely sleeping, I've had to rearrange childcare for him and if I miss another day of work my boss is going to reprimand me. To make things worse, my son gives me the hardest time about taking this medication. The first few days he kept spitting it out and making such a fuss that I spilled it all over me!"

Tech: "I'm so sorry, Ms. Simpson. It sounds like it has been a really difficult few weeks for you and your son. I've heard that this medication has a really bad taste— and it might be possible that some of the doses were spilled. That happens fairly often in situations like this."

Mother: "I don't understand why they don't provide extra medication to account for that!"

Tech: "That would certainly be helpful. But, in the meantime… I really want to make sure that your son has the medication he needs. I will ask the pharmacist to contact Dr. Jones for a replacement supply. Also— the pharmacist may be able to advise whether this medication can be flavored for your son."

L.A.S.O. Process

Listen → Acknowledge → Solve → Own
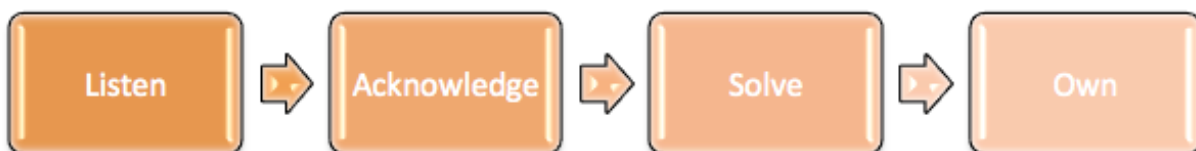
Mother: "Oh! Can you do that? I would really appreciate it! I remember the last time he was on medication they flavored it with a bubblegum flavor that he really liked!"

Tech: "Yes—I will ask the pharmacist to discuss the flavor options with you and we will contact Dr. Jones' office. Is there anything else that I can do for you right now?"

Mother: "No, you have been very helpful! Thank you!"

In this scenario, the technician did a good job of applying the LASO process. Much of the customer's frustration was caused by the disruption to her life from her son's illness, missing work, and her difficulty in dealing with those problems. The technician used effective listening skills and was able to identify the patient's problem without taking the problem personally. Next, he acknowledged the problem by repeating it back and providing an assessment of what he thought might have happened. Additionally, he suggested speaking with a pharmacist to discuss flavoring options to prevent further difficulties. The customer felt that the technician understood the issues and was offering valuable solutions. After referring the customer to the pharmacist, the technician made sure the customer did not need any additional assistance.

Example In Action:

Your co-worker, Bill, seems to always fall behind when he is scheduled to deliver his cartfill orders. All of the other technicians complete and deliver cartfill while Bill is still organizing his orders. Several of the pharmacists and technicians are getting frustrated with his inefficiency.

Technician: "Hey, Bill. I noticed you're falling a little behind on your cartfill today. I've finished my rounds—could you use some help?"

Bill: "Oh, um… I think I've got it. I am almost ready to go deliver."

Technician: "It's really no bother to me, Bill—I am happy to help you."

Bill: "Well, ok. I guess I could use a little help. It seems like everyone else around here moves so quickly! I don't even know how to keep up. I can tell everyone is frustrated with me and it really has me on edge. It's just that I am a double and triple checker—it just seems like when I get up on the floor if I don't have it organized perfectly, things can get mixed up so easily. I don't understand how everyone else does it so quickly!"

Tech: "Yeah—I can completely understand. You're handling one of the busiest floors—and it can definitely become chaotic if you don't stay organized."

Bill: "How do you finish so quickly?"

Tech: "When I first started, I used a map of the floor that I drew. Then, I organized my orders by the delivery stops on each floor. It makes it really easy to sort —and minimizes the chances to get things mixed up when you're delivering. If you'd like, I can draw one for you."

Bill: "Oh, wow! That makes so much more sense! I have been organizing the orders differently and getting things so mixed up! I find myself circling back to previous stops to deliver things that I missed. I know the nurses must get frustrated when I haven't delivered yet too!"

Tech: "If you'd like, I can go with you on your rounds, since mine are done, and show you what works for me!"

Bill: "Thank you! I would really appreciate that."

Internal customer service is often just as important as external customer service. In this scenario, the customer is a co-worker. The technician clearly acknowledged that his coworker, Bill, is struggling to meet the needs of his department. Bill's inefficiency is creating discontent within the pharmacy and potential gaps in patient care. The technician offered Bill assistance in a non-threatening way. As the technician listened to Bill, he realized that he was struggling with the delivery schedule and did not have the right tools to do his job efficiently. The technician offered to share her tools with Bill. This solution supported patient care and teamwork between the two coworkers. The technician offered to complete the rounds with Bill to help support him.

Triage Incoming Requests

Pharmacy technicians receive a seemingly endless number of requests from customers, both internal and external. Nurses often call the pharmacy to check on the status of orders, to find missing medication doses, or to clarify patient needs. Physicians call to order medications or request emergency pharmacy services. In ambulatory settings, patients may call to request refills, check on the status of an order, or resolve insurance billing issues. Each of these scenarios presents a variety of expectations or priority levels.

To effectively triage a call, the technician must identify the type of pharmacy customer who is calling. Ask for the caller's name and relationship to the patient and/or role in the patient's care. Determine what the caller needs, using effective listening. Identify whether the request is within a technician's scope of practice. If the call does not require a pharmacist's clinical judgment, resolve the problem using the LASO Process. Even if the call is passed to a pharmacist, make sure to own the process. Follow up afterward to ensure the customer does not need additional support.

Example In Action

Abby, a nurse on the cardiology floor, calls the pharmacy to check on the status of an order for her patient. She states that she called 2 hours prior and was told it was being delivered as a STAT order. When you check the electronic tracking system, you see that it was already delivered to the automated medication cabinet.

Tech: "Good morning, this is Curt in the pharmacy. How can I help you?"

Abby: "Yes, this is Abby from floor 6. My patient, Mr. Sanders, was supposed to receive a medication over two hours ago."

Tech: "Hi, Abby. I see that Mr. Sanders' dose was delivered to the cabinet at 9:06am. Were you unable to locate it?"

Abby: "Of course I am unable to locate it. That's why I am calling you. I called 2 hours ago and someone said that they would be right up. I haven't noticed anyone from pharmacy up here. You do realize that this is a critical medication, don't you? My floor is short staffed today and it seems like we've had one problem after another. I have several nurses floating up here who never work on this floor—and the last thing I need to do is investigate every dose of medication that my patients are supposed to have. Who's in charge there? Can I speak to a pharmacist?!"

Tech: "I can understand how frustrating that would be, Abby. I know how stressful it can be working with a short staff. I definitely want to make sure you get the medication for our patient and I know that's important for you too."

Abby: "Yeah—I don't know how these things always seem to get lost."

Tech: "Sometimes, through human error, the medications get placed in the wrong section of the cabinet. Would you be able to double check? If you can't find it, I will personally make sure that we get a replacement dose to you immediately."

Abby: "Ok—hold on one second."

… Pause.…

Abby: "Hi, Curt! One of my co-nurses removed it from the cabinet. She got sidetracked while she was headed to the patient's room to administer the medication and didn't let me know! I am so sorry for the confusion. Although—I notice that the medication requires refrigeration. It's been out of the refrigerator for over an hour. Is it still safe to give to the patient?

Tech: "Oh, I am so glad you found it! Although, the stability question is outside of my scope of practice. Let me explain the issue to the pharmacist and I will have her speak with you. Before I do that though, is there anything else I can do for you?"

Abby: "No, thank you. You've been very helpful!"

In this scenario, Abby was frustrated because she could not take care of her patient. She was also facing staffing shortages and other operational challenges on her floor. When Abby initially called the pharmacy, she was short with Curt and made comments that he could have easily taken personally. Curt was careful not to return the frustration. Instead, he chose to listen to Abby. This allowed her to vent about the problems she encountered that day, which had less to do with Mr. Sanders' medication than it did with other frustrations. As she talked through the problem, she began to calm down. Sometimes, allowing the customer to speak freely without immediate interruption prevents him or her from becoming defensive or more upset.

After listening to Abby, Curt expressed empathy by relating to the frustrations of staffing shortages. He repeated her problem back to her and communicated their mutual goal of taking care of Mr. Sanders. Acknowledging the customer allows her to feel validated. It also provides an opportunity for the customer to add information you might have missed or to further clarify the problem. Acknowledging that there was a problem and that he was willing to solve it together changed the dynamic and prevented the scenario from escalating.

As Curt began to solve the problem, he was very careful not to assign blame to Abby or her colleagues. When dealing with frustrated customers, it can be tempting to "win" an argument by pointing out their contribution to a problem. This does not align with the principles of good customer service and only escalates a customer service problem. Instead, Curt remained neutral and asked Abby politely for her assistance in checking for the medication.

After Abby and Curt resolved the issue, there was no need to assign blame. They had worked together to resolve the missing medication problem and neither felt defensive. After the problem was resolved, Abby had additional follow-up questions about the medication's stability. Questions that require clinical judgment are outside a technician's scope of practice. Curt explained to Abby why he needed to transfer the call. Before getting a pharmacist on the line, he ensured that Abby's customer service needs were met. Owning the process is very important. To follow up, Curt should check with the pharmacist to ensure the medication is still stable and Abby will not need a replacement dose for Mr. Sanders.

Example in Action

You receive a phone call from Mr. Curtis, who is leaving for vacation in two weeks and realizes that he won't have enough medication to last the duration of his trip. You try to process the medication claim through his insurance, but the claim is denied. At the same time, a patient comes to the counter with a prescription from the emergency room that needs to be filled immediately.

Tech: "Good afternoon, you've reached the pharmacy. This is Lisa. How can I help you?"

Mr. Curtis: "Yes, this is Mr. Curtis. I am leaving for vacation 2 Saturdays from now and need to have my medications refilled so I don't run out."

Tech: "Ok, Mr. Curtis. I am happy to help you—but it looks like the insurance company is denying the refills because they are too soon."

Mr. Curtis: "Is there anything you can do about that? I won't have access to a pharmacy while I'm on vacation."

Tech: "Mr. Curtis, I can contact your insurance company to see whether they allow for a vacation provision. Thank you for calling in advance and giving us ample time. Could I make the necessary phone calls and return your call later?"

Mr. Curtis: "Yes… I think that would be ok."

Tech: "Great, Mr. Curtis. I will make those calls as soon as I finish with the customers in the pharmacy. My name is Lisa. I will be contacting you back later this afternoon. But, if there is anything else I can do to help you, please don't hesitate to contact me."

Mr. Curtis' call presents a common scenario in many community pharmacies. Insurance questions and claim denials are within the scope of most technicians' practice. Lisa was not able to immediately resolve Mr. Curtis' problem because it would require a phone call to his insurance company. By clearly explaining the problem to Mr. Curtis and providing a solution, Lisa was able to prevent an escalated reaction. Because Mr. Curtis contacted Lisa a couple of weeks before he was scheduled to leave town, it was easy for Lisa to assess the priority of his request and assist the customers in the pharmacy who had more critical medication needs. This was an appropriate way to triage the requests. Lisa owned the process by providing Mr. Curtis with her name and contact information. She explained the steps necessary to resolve his problem so that Mr. Curtis had clear expectations.

Triage follow-up requires that technicians:

- Identify priorities,
- Make patient care a top priority,
- Remain aware of all pharmacy stakeholders' time and needs, and
- Use best judgment.

Triaging pharmacy phone calls and requests requires flexibility and knowledge about pharmacy operations. Requests often have competing priorities. When multiple concurrent requests are made, a technician must quickly identify which request is the most central to patient care and the most urgent to the operation of the pharmacy. Other members of the pharmacy staff may also be busy, so a technician must be aware of the pharmacist's time limitations and other duties. A technician can often handle requests made for the pharmacist such as the status of an order, the cost, or insurance questions. Technicians must only answer questions within their scope of practice and refer questions requiring clinical judgment to the pharmacist. Use good judgment and refer to the pharmacist when in doubt.

Difficult Customers

When dealing with difficult customers, technicians should:

- Follow the Platinum Pharmacy Rule,
- Use the L.A.S.O. process,
- Minimize miscommunication,
- Remain calm, and
- Do not personalize.

Pharmacy customers can be difficult. It can be challenging to apply customer service techniques without advance preparation. Remember that the Platinum Pharmacy Rule requires treating others the way they want to be treated. When someone has constantly changing expectations or requests that cannot be fulfilled, it might seem impossible to meet the customer's needs. Follow through with the LASO process, but expect a difficult customer to require additional time to communicate his or her concerns. A difficult customer may simply need additional information, patience, and empathy. Listen to the entire problem and calmly communicate the pharmacy's options and limitations. Difficult customers could be facing their own challenges and stressors. Do not take a customer's behavior personally. Stay calm, try to determine the treatment the customer expects, communicate clearly, and fully evaluate all available options.

Example in Action:

Lisa is a regular customer at your pharmacy. She takes several different medications and often has problems keeping track of her medication refills and insurance plan requirements. Today, when Lisa arrives at the pharmacy, you notice that several of her medications are out of refills and that her insurance coverage has changed, increasing her co-pays.

Lisa: "Refill everything on file for me, Curt. And, let me know how much this is gonna cost me this time."

Curt: "Ok, Lisa! Let's review which medications you need though, because I don't want to fill anything you don't need anymore."

Lisa: "I just said to refill everything. I wouldn't say that if I didn't need everything."

Curt: "Ok—some of the medications aren't available for refill any longer, so I'd like to review ---"

Lisa: "What do you mean out of refills?! Call my doctor. Or look again. I know I brought you some prescriptions last month."

Curt: "Ok, no problem. I am just going to go over each of your medications and you can let me know whether you'd like a refill."

Lisa: "I don't understand why this always has to be such a hassle. It seems like every single time I go to the doctor anymore I'm getting a new prescription. I used to be so healthy and now it seems that I can't do any of the things I enjoy anymore. I spend most of the day focusing on which medications to take. I hate keeping track of everything!"

Curt: "I'm sorry, Lisa. It sounds like this would be very overwhelming. Do you think it would be helpful to go over your medications with our pharmacist? Perhaps he could help you better understand how they work and help you take control of your therapies. Then we could make sure that we are refilling the most appropriate medications for you."

Lisa: "Oh, really? Would the pharmacist do that? I do think that would be really helpful."

Curt: "Sure! Is there anything else I can do for you before I get the pharmacist though?"

Lisa: "Yes—can you let me know how much my medications will cost this month?"

Curt: "It actually looks like your co-pays have increased by $40 this month."

Lisa: "WHAT?! Why?! I simply cannot afford all of these increases!"

Curt: "I notice that several of your medications are brand name. When the pharmacist comes over, I will have him discuss generic alternatives with you. Sometimes that can be a real cost saver. If he thinks generic alternatives might be an option, we can call your doctor to have them changed, if necessary."

Lisa: "Wow. Thank you Curt. You have been really helpful and informative."

In this scenario, the customer expects the technician to simplify the refill process by filling everything on her profile. According to the platinum pharmacy rule, the patient wants the process to be uncomplicated. The technician knows that this can be a dangerous request to fulfill if the medication has been discontinued without the pharmacy's knowledge. The technician attempts to explain this to the patient before implementing the LASO process. As the technician listens to the customer, he realizes that she is frustrated with the number of medications she's required to take and the increasing costs. It becomes clear that she is overwhelmed with the management of her therapies. By understanding this, Curt finds it easier to remain calm and not take her frustrations personally. He effectively acknowledges the customer's concerns and frustrations and suggests that she discuss her clinical concerns, including generic alternatives, with the pharmacist. By sympathizing with the patient and understanding why she's frustrated, the technician deescalated a difficult situation and provided great customer service.

Example in Action:

You are refilling the automated dispensing cabinet with your replenishment order when a nurse approaches and asks how long you will be. She seems to be in a hurry and frustrated that the cabinet is not free for her use.

Nurse: "Excuse me, but are you going to be very long? I need to get into the cabinet."

Tech: "I am actually just completing my replenishment order. I should only be a few more minutes. I'll run my report quickly and then its all yours."

Nurse: "You know—it seems like every single time I need in there—to take care of MY patients—someone from the pharmacy has it occupied."

Tech: "I apologize. I can log out temporarily if you need to get in—I understand that you need to take care of your patients."

Nurse: "Can you just pull out the meds for bed #2 and hand them to me?"

Tech: "I'm sorry—I can't do that under my login according to our policies."

Nurse: "It's not that I need anything STAT—it just seems like something is always in the way. I haven't even had a lunch break yet today. I just wanted to get these doses administered so that I could take a break. It's just been a really long day."

Tech: "I completely understand. Sometimes when we're doing these replenishments, it can take a good deal of time. Usually, we can find a good stopping place though, if you ever need to get in. Then, you can log in and get what you need. It really isn't a hassle at all. We all have the same goals for our patients."

Nurse: "Thank you. That's really good to know. Next time I need something urgently, I will be sure to ask the technician for help with that."

Tech: "You're very welcome. And, my name is Randy. I am often the technician on your floor. If there is anything else I can help you or your co-workers with, I am happy to."

Nurse: "Thank you, Randy."

To follow up with difficult customers:

- Try to minimize confusion and frustration,
- Recognize that difficulties often arise from misunderstanding,
- Set goals to resolve the issue, and
- Maintain realistic expectations.

Nurse-pharmacy relationships can become stressed due to conflicting time constraints, patient expectations, and resources. It can be easy to forget the common goal: to care for patients. Trusting that both sides are working toward that goal can help the technician remain calm when faced with a difficult customer. In the previous scenario, the medication cabinet was a common tool that both parties needed to access to complete their patient care duties. Sometimes, the technician's tasks in the cabinet can take a significant amount of time. If the nurse needs medications quickly for a patient, it makes sense to find a good place to stop, log out, and allow the nurse to have access to the cabinet. This should not become a battle of wills.

By listening to the nurse, the technician is able to see that they are both faced with many other pressures. Acknowledging her frustration and providing a quick solution deescalates the problem. It minimizes miscommunications by explaining the technician's contributions to the patient care process. Completing the LASO process and taking ownership allows the nurse and technician to build a partnership that can better support the goals of patient care.

All technicians will inevitably encounter difficult customers. Difficulties often arise from confusion and misunderstandings. Use the LASO process to determine the customer's perceptions of the scenario. If their information is inaccurate, offer the correct information in a non-confrontational way. The goal is to help them resolve the problem. Technicians must maintain realistic expectations. Sometimes legal, regulatory, or other reasons prevent meeting the customer's request. In that case, explain the reason clearly and professionally while offering other options.

Pharmacy-specific Concerns

- *Pharmacy inventory* can influence customer service solutions. Pharmacies often limit offerings of over-the-counter medications, generic medications, and medical equipment to contain costs. Inventory control measures do not typically limit patient care, but customers may occasionally request or require products outside of the normal inventory.

- *Pharmacy technology* is rapidly expanding. Many automated tools help pharmacists and technicians do their job more efficiently and provide even better customer service. Occasionally, these systems do not operate effectively: whether online or telephone refill orders; electronic medical records; electronic prescribing; or automated dispensing cabinets. Like all technology, glitches occur and create customer service requirements of their own.

- *Pharmacy laws* vary by state and can be very complex. Individuals outside of the profession are not familiar with the regulations that govern pharmacy and have expectations that do not match what is allowed. Concerns regarding controlled substances, refills, billing, and orders can all cause misunderstandings. Technicians should minimize miscommunications and set clear expectations for customers when legal restrictions apply.

- *Insurance* is a daily hurdle for pharmacists and technicians and a source of tension for customers. Insurance billing is a regular task in community practice settings. In hospital settings, admission and discharge standards are increasingly focusing on pharmacy services. Technicians must understand insurance policies and be knowledgeable about the most common scenarios in the pharmacy.

Pharmacy customer service has unique requirements and restrictions. Pharmacy operations and procedures may dictate the available solutions. The pharmacy's workflow, physical space, and technology can also influence customer service.

Drug Shortages

Drug shortages have been rapidly increasing, creating a crisis that affects health care providers and patients all over the country. As critical medication shortages increase, customer frustration increases as well. The best way to maintain customer service during a drug shortage is to stay informed. Many organizations provide regular communications related to drug shortages, including the Food and Drug Administration, who publishes regular drug shortage information on their website. Technicians need to know which shortages affect their pharmacy practice so they can share that information with customers. Solutions to drug shortages may be simple or complex. By explaining the challenges and attempting to offer insight, technicians can better partner with customers to maximize options.

Communication within the medical team is crucial. Many technicians are responsible for managing inventory and are the first to notice a shortage. If that happens, communicate with the pharmacist to begin a dialogue about alternative therapies and the priority level for locating product. If medication cannot be obtained for a patient, the prescriber needs to evaluate alternative therapies or treatments.

Example in Action:

Dr. Shepherd, an anesthesiologist, calls the pharmacy to inquire about a medication that is normally stocked on his floor. He is preparing for surgeries and notices something different about the medication that has been stocked.

Tech: "Good morning, you've reached the pharmacy. This is Melissa. How can I help you?"

Dr: "Yes, this is Dr. Shepherd. I am calling from general surgery. I am preparing for my surgeries today, and I notice that I won't have enough anesthetic for all of our scheduled cases. I tried ordering more, but the system has it blocked. Was there a change that I am unaware of?"

Tech: "Hi, Doctor Shepherd. I'm so sorry for the confusion. I know that there were some changes to our anesthesia medications this morning because we didn't receive our normal shipment."

Dr: "Well, what am I supposed to do? I have surgeries scheduled."

Tech: "From my understanding, there is a drug shortage on the 250mcg dose we normally stock on your floor. However, we can still obtain the 75mcg syringes. According to my system, we delivered them at the start of our shift this morning. The syringes are probably a different color though."

Dr: "Oh—you're right. I see them here. I am used to looking for the blue syringes."

Tech: "Yes...Each dose actually has a different color. Dr. Shepherd, would you like to speak with a pharmacist about the change to discuss dosing or other considerations?"

Dr: "No, thank you. I can dose the medication appropriately and there shouldn't be any other changes. I will note the change in the patient's record."

Tech: "Thanks, Dr. Shepherd. I will discuss our call with my manager to make sure we get communications out to the medical teams to prevent any errors or delays in care. My name is Melissa. Is there anything else I can help you with?"

Dr: "That would be great—I'm sure other docs will be looking for the normal doses too. Thanks, Melissa. You've been very helpful."

In this scenario, the technician was informed about the shortage and was able to quickly provide a solution for Dr. Shepherd. Sometimes shortages are specific to doses, and in this case, an alternative was available for Dr. Shepherd's patients. However, because there was a change, it was critical to offer an opportunity to discuss dosing with the pharmacist. Even though Dr. Shepherd declined to speak with a pharmacist, it served as a good reminder that he would need to calculate the dose and document the changes. Melissa did a good job of identifying that this shortage would affect other team members and that communicating with other providers would minimize delays in patient care and minimize the risk of errors. This is a great demonstration of teamwork

HIPAA

The Health Insurance Portability and Accountability Act of 1996 changed the way many pharmacies and health care institutions operate. HIPAA provided protections for health care customers regarding the way their health care information is used. HIPAA also created a new set of customer service considerations and changed many standard operating procedures. All pharmacy technicians should be well educated about HIPAA and how it pertains to their practice. Not only is it an essential component of pharmacy customer service, it is the law. Technicians must ensure that a patient's privacy is not violated while completing necessary tasks. HIPAA allows a pharmacy to share information in certain circumstances: with an insurance company paying the claim, medical providers involved in the patient's care, or authorities of the law. In those circumstances, these representatives also become customers.

A patient's caregiver, family member, or other unauthorized representative cannot have access to information under most circumstances. This can be frustrating for patients and their caregivers who request information to perform financial tasks or provide care for the patient. Following HIPAA laws must always take precedence over a customer's complaint. Technicians can minimize frustration by clearly explaining the restrictions. If HIPAA restrictions are unclear, verify them with the pharmacist.

Example in Action:

Scott and his family have been longtime customers at your pharmacy. You know Scott and his wife, Lucy, very well. During Scott's most recent visit to the pharmacy, he asks for an annual report of medications filled for himself and Lucy.

Tech: "Hi, Scott! How are you today?"

Scott: "Hi, Nancy! I'm doing great! Just getting back from our son's baseball game. He played really well! How are you?"

Tech: "I'm doing great. It's good seeing you."

Scott: "Nancy, I just need to have these prescriptions filled. I'll come back to pick them up tomorrow, so no rush."

Tech: "Ok, no problem! Just to verify—you want these two for Lucy—and then just one for yourself?"

Scott: "Yep! And, that reminds me. I am getting ready to file my taxes and my accountant tells me that I need a printout of all my prescription expenses for last year. Can you print that out for Lucy and I?"

Tech: "Sure, Scott. I can do that! The only thing is that privacy laws require that Lucy requests her own and picks them up herself."

Scott: "Well, surely that wouldn't be the case for us, right? I mean—you've known me for ages. And, I always pick up Lucy's prescriptions anyways. I already know which medications she takes."

Tech: "I know… it's sort of a hassle in situations like this—but my hands are kind of tied. I'll tell you what though… if Lucy stops in, I can print them immediately for her. Or, if she'd prefer to call and request the records, I can mail them to her the same day."

Scott: "I understand, Nancy. I wouldn't want you to break any rules for me. I think Lucy should be near the pharmacy tomorrow anyways—and we don't meet with our accountant until the weekend. I'm sure it won't be a problem… she can pick up our prescription orders then."

Tech: "Thank you so much for understanding."

In this scenario, the technician knew that the requestor had no ill intentions. The technician could not fulfill Scott's request but still provided good customer service. Because Scott was using the information for his and Lucy's mutual benefit, it initially seemed strange to him that he could not have access to the records he requested. After the technician explained the limitations of HIPAA laws, he understood his pharmacy's restrictions. This communication minimized the potential for an escalated customer service scenario. Even though the technician could not provide Lucy's prescription records, she did provide alternative solutions. Because Scott understood why an alternate solution was necessary he was willing to make adjustments so that Lucy could obtain her records in person.

Summary

Pharmacy has many types of internal and external customers, including non-patient caregivers and medical professionals, but the primary focus is always on the patient. Technicians can use the L.A.S.O Process, Platinum Rule, and Triage Techniques to provide exceptional customer service.

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Answers to Reflective Questions—1: D, 2: D