

**IMPLEMENTING PHARMACEUTICAL CARE  
PPRA 0702  
WINTER QUARTER 2003 - 2004**

**Workshop Dates/Times:**

<b>Workshop</b>	<b>Downers Grove (LTC A)</b>
<b>1</b>	12/6/03 8:30 – 11:30 AM
<b>2</b>	1/10/04 8:30 – 11:30 AM
<b>3</b>	2/7/04 8:30 – 11:30 AM

\*Students attending via videotape should expect to receive their tapes approximately one week after each session.

**Instructors:**

David P. Zgarrick, Ph.D., R.Ph. (Course Coordinator)  
Associate Professor and Vice Chair  
Department of Pharmacy Practice  
Educational Resource Center (ERC), Downers Grove Campus, Room E-201  
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**Important Note** – Dr. Zgarrick will be out of the office Dec. 7 – 14 and Feb. 15 – 23. He will not be able to check his e-mail or telephone messages while he is away. Please plan your contacts with Dr. Zgarrick accordingly!

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**Course Materials (Required):**

Schumock, G.T. How to Develop a Business Plan for Clinical Pharmacy Services: A Guide for Managers and Clinicians. Published by the American College of Clinical Pharmacy (ACCP), 2001. **This includes a diskette that will be needed to submit your homework assignments!**

**Course Materials (Recommended):**

How to Bill for Clinical Pharmacy Services (3<sup>rd</sup> Edition). Published by the American College of Clinical Pharmacy (ACCP), 2001.

Rovers, J.P., et. al. A Practical Guide to Pharmaceutical Care (2<sup>nd</sup> Edition). Published by the American Pharmacists Association (APhA), 2003.

**The books will not be available from the MWU Bookstores!** ACCP has agreed to give all students registered for this course a 20% discount on the books published by ACCP, regardless of membership in ACCP. If you are an ACCP member, you will receive an additional discount. To obtain this discount, you must order these books directly from ACCP. To order your books, please contact Tina Patterson at 1-816-531-2177 and mention that you are a student registered for this course at Midwestern University.

To order the book published by APhA, call 1-800-878-0729 or go to [www.pharmacist.com](http://www.pharmacist.com) and click on "Store".

**Credit Hours:** 3.0

**Course Description:**

This course introduces students to the clinical, managerial and economic issues regarding the implementation of patient-oriented professional services into pharmacy practice. Readings, workshops and homework assignments are used to explore the need for new pharmacy services, describe how to integrate services into practice, and how to assess the resulting clinical and economic outcomes from a variety of perspectives. By the end of the course, students will develop a business plan to justify and guide the implementation of a patient-oriented professional service into a pharmacy practice.

**Course Objectives:**

Upon completing this course, the student should be able to:

1. Review the literature to gather information for a proposed patient-oriented professional service.
2. Explore critical factors to assess the viability of a professional service.
3. Evaluate the needs of potential consumers for a professional service.
4. Identify the characteristics of competitors for pharmacists' professional services.
5. Address standards for delivering quality patient care.
6. Develop processes to provide professional services in a cost-effective manner.
7. Develop marketing strategies to effectively promote professional services to consumers.
8. Identify risks and problems that are inherent in the implementation of pharmaceutical care services.
9. Analyze the financial viability of a service by collecting data and developing financial statements.
10. Outline major objectives for a service, describing how and when they will be achieved.
11. Write an effective business plan for the development of a patient care-oriented professional service.

**Course Components:**

The overall purpose of this course is to help pharmacists develop business plans to implement patient-oriented professional services in their practice settings. These plans are designed to expand the scope of pharmacy practice at the student's site. Successful implementation of these plans may result in experiential education credit in CCP's Non-traditional Pharm.D. Program.

Managers have traditionally developed business plans to describe the services they would like to provide, and to convince administrators of the benefits their organization would gain if the services were offered. Through the use of readings, modules, and workshops, the instructors will "coach" students in the development of business plans.

Modules/Assignments – The Schumock text contains a step-by-step guide for developing a business plan for implementing a clinical pharmacy service. The text has been broken into chapters that consider all of the critical factors that are essential to implement these services. There are questions at the end of each

chapter that will help you address the issues that administrators consider when evaluating your proposal for a professional service.

Answering the questions at the end of each chapter will be the assignment for each module. Readings from the texts as well as references from the literature are listed in the syllabus to give you the background information needed to answer these questions. By completing each assignment, you will have all of the information you will need to write your business plan.

To complete your assignment for each module, you must open the Microsoft Word file entitled "Chapter 1" on the diskette that accompanies the Schumock text. This file contains the questions at the end of each chapter of the text. Type your answer to each question, and then "Save As" your file, renaming it with your name ('First Name' 'Last Name'). You must e-mail this file to Dr. Zgarrick by the deadlines stated in the syllabus. Dr. Zgarrick will grade and type his comments on your file, and then e-mail it back to your MWU e-mail address. **All assignments must be e-mailed!**

There are no "right or wrong" answers to the questions. Responses will vary by practice setting and type of clinical service proposed. The instructors encourage students to ask questions while they are completing their assignments. We can provide a great deal of information that may clarify what is being asked. Assignments will be graded based on the depth and breath of response.

Workshops – The three workshops are designed to provide information and resources in an environment that facilitates interaction between students and instructors. Time will be devoted to lecture on important topics (handouts will be provided), discussion of practical issues, and sharing of experiences between students and instructors. Attendance/viewing of each workshop is essential to understanding the issues necessary to successfully implement clinical pharmacy services. See the syllabus for a description of what will occur at each workshop.

The Business Plan - A business plan is a written document that describes the critical factors that must be considered when implementing a new professional service. It must convey that you have the knowledge, skills and resources necessary to be successful. It must also convince decision-makers that the plan will be in the best interest of the organization (and not just of the patient or pharmacist).

Chapter 11 of the Schumock text describes how to prepare a business plan. Appendix II of the text provides a template for developing a business plan (this template is also a Microsoft Word file on the diskette). This template must be the format you use to develop your business plan for your patient-oriented professional service.

#### **Grading:**

Module Assignments (8 assignments x 25 points/each)	200 points
Business Plan	<u>300 points</u>
<b>Course Total</b>	<b>500 points</b>

Achieving the following scores will guarantee that you will receive at least some form of the following letter grades. + and – grades will be given to those near the upper and lower boundaries of the A and B ranges. The instructor reserves the right to **lower** the scores required to receive each of the following grades:

<b>Grade</b>	<b>Percentage</b>	<b>Points</b>
<b>A-</b>	≥ 90%	≥ 450
<b>B-</b>	80 – 89.9%	400 – 449
<b>C</b>	72 – 79.9%	360 – 399
<b>D</b>	65 – 71.9%	325 – 359
<b>F</b>	< 65%	< 325

#### **Course Policies:**

Modules/Assignments:

All of the questions that must be answered at the end of each chapter are on the diskette that came with the Schumock text. Following the instructions provided above, you must complete each assignment by the deadline stated in the syllabus. **All module assignments must be e-mailed!** For assignments that arrive at the deadline, the course coordinator will make every effort to grade and return them to your MWU e-mail address within 48 hours! Assignments that are sent to the instructor after the due date will be penalized 5 points for each day they are late. Due date extensions must be agreed to with the instructor prior to the assignment deadline (see below).

#### Business Plan:

Students must complete a business plan for a patient oriented professional service based on the module assignments. Business plans must adhere to the format described in Appendix II of the Schumock text (also included on the diskette). The business plan for your proposed service must be **e-mailed** to Dr. Zgarrick by **February 23<sup>rd</sup>** if you are a Downers Grove student and **March 1<sup>st</sup>** if you attend via videotapes. Appendices to business plans can be sent to Dr. Zgarrick using US Mail, but must also be postmarked no later than the above deadline. Business plans that are submitted after the due date will be penalized 50 points for each day they are late. Due date extensions must be agreed to with the instructor prior to the deadline (see below).

#### Excused Absences and Extensions:

To be excused from a workshop or to receive an extension for an assignment, you must contact the instructor **prior to** the workshop or assignment deadline. Personal illness, personal emergency, personal incapacitation, or critical illness/death in the family are the only valid excuses for missing a workshop or assignment deadline. You may be required, at the discretion of the instructor, to provide a note from a physician or other form of documentation in order to obtain an excused absence or extension.

#### Planned Absences:

Planned absences from workshops for purposes of attendance at a professional organization activity must be approved by the instructor **prior to or at the time of the first workshop**. If approved, plans for making-up any missed activities will be determined at that time.

#### **Academic Dishonesty:**

Academic dishonesty is defined in the MWU Student Handbook as intentional cheating, fabrication or plagiarism; unauthorized collaboration (including knowingly helping or attempting to help others be dishonest) or other deceitful practices; disruptive or illegal use of computer resources; or knowingly furnishing false information to a department, the College, or the University. Acts of academic dishonesty are absolutely forbidden in this course. Academic dishonesty should be discouraged by peers as not being appropriate professional conduct.

Actions that will be taken in the event that a student is caught in a dishonest act include, but are not limited to: a failing grade for the work involved; suspension from the course which may result in a failing grade for the course; automatic failure in the course; and/or expulsion from the program. A student may be brought up for a disciplinary hearing based on the seriousness of the incident following consultation with the MWU Dean of Student Services.

Please note: While you are encouraged to discuss your readings, modules, and business plans with your classmates, **all written work for this course must be performed as an individual**. All written work will be reviewed for plagiarism. Your work will be compared to your classmates as well as to business plans created by students in this course in previous years. Plagiarism is an act of academic dishonesty and will be treated accordingly!

**ASSIGNMENTS AND READINGS  
IMPLEMENTING PHARMACEUTICAL CARE  
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<b>Date</b>	<b>Topic</b>
12/6/03	<p><b><u>Workshop 1</u></b></p> <p><u>Pre-workshop Assignment</u></p> <ol style="list-style-type: none"> <li>1. Read the three introductory sections of "How to Develop a Business Plan . . ." (p. i - iii).</li> <li>2. Read the first chapter of "How to Bill for Clinical Pharmacy Services" (p. 1-5), and Chapters 1 &amp; 17 of "A Practical Guide to Pharmaceutical Care".</li> <li>3. Come to class with an idea for a patient-oriented clinical pharmacy service that you would like to implement, as well as a practice site where you would implement this service.</li> </ol> <p>A. Course Introduction</p> <ol style="list-style-type: none"> <li>1. Role of business and management in pharmacy practice</li> <li>2. Explanation of assignments and course policies</li> </ol> <p>B. Introduction to Strategic and Business Planning</p> <ol style="list-style-type: none"> <li>1. Presentation by Dr. Zgarrick (notes will be provided in class)</li> </ol> <p>C. Discussion of Modules 1 - 4</p> <ol style="list-style-type: none"> <li>1. Discuss resources available for reviewing the literature for professional pharmacy services.</li> <li>2. Discuss the critical factors used to determine the viability of proposed professional services.</li> </ol>
	<p><b><u>Module #1 – Reviewing the Literature</u></b></p> <p><u>Assignment:</u> Think of a patient-oriented pharmaceutical care program or professional service that you would like to develop (preferably at your current practice site or a practice that you are familiar with). Then read Chapter 1 of "How to Develop a Business Plan . . ." and answer the questions at the end of the chapter (see Chapter 1 MS Word file on diskette).</p> <p><u>Readings:</u> The following reading(s) may help you with your assignment:</p> <p>Singhal PK, Raisch DW, Gupchup GV. The impact of pharmaceutical services in community and ambulatory care settings: Evidence and recommendations for future research. <i>Ann Pharmacother</i> 1999 Dec;33:1336-55.</p> <p>Carter BL. Clinical pharmacy in disease-specific clinics. <i>Pharmacotherapy</i> 2000 Oct;20(10 Pt 2):273S-277S.</p> <p>Carter BL, Helling DK. Ambulatory care pharmacy services: has the agenda changed? <i>Ann Pharmacother</i> 2000 Jun;34(6):772-87.</p> <p><u>Due Date:</u> Must be e-mailed by 12/15/03 for Downers Grove students, 12/22/03 for videotape students</p>

**Module #2 – Exploring the Business Concept**

**Assignment:** Keeping in mind the service you identified in Module 1, answer the questions at the end of Chapter 2 (see Chapter 1 MS Word file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions.

**Readings:** The following reading(s) may help you with your assignment:

Knowlton CH, Thomas OV, Zarus SA, Buttarro ML. Planning for new pharmacy services." J Am Pharm Assoc 1998, 38(5): 626-7.

Carmichael JM, O'Connell MB, Devine B, et. al. Collaborative drug therapy management by pharmacists." Pharmacotherapy 1997, 17(5): 1050-61.

Bond CA, Raehl CL, Franke T. Interrelationships among mortality rates, drug costs, total costs of care, and length of stay in United States hospitals: summary and recommendation for clinical pharmacy services and staffing. Pharmacotherapy 2001; 21(2):129-41.

**Due Date:** Must be e-mailed by 12/15/03 for Downers Grove students, 12/22/03 for videotape

**Module #3 – Evaluating the Market**

**Assignment:** Keeping in mind your proposed service, answer the questions at the end of Chapter 3 (see Chapter 1 file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions.

**Readings:** The following reading(s) may help you with your assignment:

"A Practical Guide to Pharmaceutical Care" pp. 203-209.

McDonough RP, et. al. Marketing pharmaceutical care services." J Am Pharm Assoc 1998, 38(6), 667-681.

Johnson VB, Crane V, Hayman JN. Marketing an investigational drug service. Top Hosp Pharm Man. 1993, 13(1), 16-28.

**Due Date:** Must be e-mailed by 1/5/04 (DG) or 1/12/04 (videotape)

**Module #4 – Evaluating Competitors**

**Assignment:** Keeping in mind your proposed service, answer the questions at the end of Chapter 4 (see Chapter 1 file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions.

**Readings:** The following reading(s) may help you with your assignment:

McDonough RP, et. al. Marketing pharmaceutical care services." J Am Pharm Assoc 1998, 38(6), 667-681.

**Due Date:** Must be e-mailed by 1/5/04 (DG) or 1/12/04 (videotape).

1/10/04

**Workshop 2****Pre-workshop Assignment**

1. Read Chapter 7 of "How to Develop a Business Plan . . ." before coming to class. You do not need to answer the questions before workshop.
  2. Read p. 7 – 45 of "How to Bill for Clinical Pharmacy Services" and Chapters 2 – 7 of "A Practical Guide to Pharmaceutical Care" before coming to class.
- A. Marketing and Promotion of Pharmaceutical Care Services
1. Presentation by Dr. Zgarrick (notes will be provided in class)
- B. Clinical Aspects of Pharmaceutical Care Services
1. Presentation by Dr. Brock on the practical aspects of planning and implementing pharmaceutical care services (notes will be provided in class)
    - a. Getting Started (identifying needs, developing relationships, etc.)
    - b. Clinical policies and procedures
    - c. Billing and reimbursement
    - d. Outcomes evaluation
- C. Discussion of Modules 5 - 8
1. Brief overview of upcoming assignments.

**Module #5 – Assessing Clinical and Quality Requirements**

**Assignment:** Keeping in mind your proposed service, answer the questions at the end of Chapter 5 (see Chapter 1 file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions.  
**Please skip question 8.**

**Readings:** The following readings may help you with your assignment:

[www.guidelines.gov](http://www.guidelines.gov)

Ferro LA, et. al. Collaborative practice agreements between pharmacists and physicians. J Amer Pharm Assoc 1998, 38(6), 655-664.

Ling CA, Goode JR, Kennedy DT, Small RT. In search of literature on clinical practice guidelines for the provision of pharmaceutical care. Amer J Health-syst Pharm 1998, 55: 1943-7.

**Due Date:** Must be e-mailed by 1/19/04 (DG) or 1/26/04 (videotape).

**Module #6 – Assessing Proposed Process and Operations**

**Assignment:** Keeping in mind your proposed service, answer the questions at the end of Chapter 6 (see Chapter 1 file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions.

**Readings:** The following readings may help you with your assignment:

Chapters 15, 16 & 18 from “A Practical Guide to Pharmaceutical Care”.

McDonough RP, Doucette WR. Developing collaborative working relationships between pharmacists and physicians. J Amer Pharm Assoc 2001, 41(5): 682-92.

Holdford DA, Kennedy DT. The service blueprint as a tool for designing innovative pharmaceutical services. J Amer Pharm Assoc 1999, 39(4): 545-52.

Billups SJ., et. al. Assessing the structure and process for providing pharmaceutical care in Veterans Affairs medical centers.” Amer J Health-sys Pharm 2000, 57: 29-39.

**Due Date:** Must be e-mailed by 1/19/04 (DG) or 1/26/04 (videotape).

**Module #7 – Developing a Marketing Strategy**

**Assignment:** Keeping in mind your proposed service, answer the questions at the end of Chapter 7 (see Chapter 1 MS Word file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions. **Please skip question 8.**

**Readings:** The following readings may help you with your assignment:

“A Practical Guide to Pharmaceutical Care” pp. 203-221.

Doucette WR, McDonough RP. Beyond the 4Ps: Using relationship marketing to build value and demand for pharmacy services. J Am Pharm Assoc 2002, 42(2), 183-93.

McDonough RP, et. al. Marketing pharmaceutical care services.” J Am Pharm Assoc 1998, 38(6), 667-681.

**Due Date:** Must be e-mailed by 2/2/04 (DG) or 2/9/04 (videotape).

### **Module #8 – Assessing Critical Risks and Opportunities**

**Assignment:** Keeping in mind your proposed service, answer the questions at the end of Chapter 8 (see Chapter 1 MS Word file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions.

**Readings:** The following reading(s) may help you with your assignment:

Chapter 17 from “A Practical Guide to Pharmaceutical Care”.

Schneller LW, Powell MF, Solomon DK. Using the business plan to propose revenue-generating pharmacy services. *Hosp Pharm* 1998;23(9):806-11.

Schumock G, Michaud J, Guenette A. Re-engineering: an opportunity to advance clinical practice in a community hospital. *Amer J Health-syst Pharm* 1999; 56: 1945-9.

Baker KR. Practitioner risks and malpractice concerns. p. 59 – 77 of “How to Bill for Clinical Pharmacy Services”.

**Due Date:** Must be e-mailed by 2/2/04 (DG) or 2/9/04 (videotape).

2/7/04

### **Workshop 3**

#### **Pre-workshop Assignment**

1. Read Chapter 9 of "How to Develop a Business Plan . . ." before coming to class. You should attempt to answer the questions at the end of the chapter prior to coming to workshop. You **will not** have to hand in your answers for the Module 9 assignment.
  - A. Financial Aspects of Pharmaceutical Care Services
    1. Evaluating the costs and benefits of providing pharmaceutical care services.
      - a. Dr. Zgarrick will demonstrate how to evaluate the costs and benefits of a professional service using the resources provided in the “How to Develop of Business Plan . . .” book and diskette.
  - B. The Big Test – Evaluation of Business Plans by Administrators
    1. Drs. Provenzano and Schumock will describe their experiences with business planning, and what they look for when they evaluate business plans prepared by their pharmacists.
  - C. Discussion of Modules 9 – 10 and the Business Plan

**Module #9 – Developing Financial Data and Projections**

**Assignment:** Start by answering the questions at the end of Chapter 9. Your answers to these questions **do not** need to be handed in! Use them to complete the “Input” tab on the “Busplan” file on the diskette (MS Excel file). Dr. Zgarrick will demonstrate how to do this in Workshop 3. This will automatically create a Financial Pro-Forma for your service.

**Readings:** The following readings may help you with your assignment:

Chapter 13 from “A Practical Guide to Pharmaceutical Care”.

Poirer S, Buffington DE, Memoli GA. Billing Third Party Payers for Pharmaceutical Care Services. J Am Pharm Assoc 1999, 39(1): 50-64.

Norwood GJ, Sleath BL, Caiola SM, Lien T. Costs of implementing pharmaceutical care in community pharmacies. J Am Pharm Assoc 1998, 38(6): 755-61.

Schumock G. Methods to assess the economic outcomes of clinical pharmacy services. Pharmacotherapy 2000;20(10 Pt 2):243S-52S.

**Due Date:** This module does not need to be turned in. The financial statements you create should be included with your final business plan.

**Module #10 – Identifying and Action Plan and Timeline**

**Assignment:** Keeping in mind your proposed service, answer the questions at the end of Chapter 10 (see Chapter 1 MS Word file on diskette). You may need to perform additional research or speak with decision makers within your organization to address these questions.

**Readings:** The following readings may help you with your assignment:

Chapter 19 from “A Practical Guide to Pharmaceutical Care”.

**Due Date:** This module does not need to be turned in. The tables and charts you create should be included with your final business plan.

**Final Business Plan Document**

1. Read Chapter 11 of “How to Develop a Business Plan . . . “ as soon as you have completed the first two modules. This will help you better understand how the information you are gathering for your module assignments fit into a business plan.
2. When you start preparing your business plan, review Appendix II of “How to Develop a Business Plan . . . “. This will provide you with the format needed for the business plan, and tell you what information should go from your module assignments into various parts of your business plan. A MS Word file on the diskette (title page) contains the template for the business plan. You can use this template to write your business plan by simply inserting all of the requested information.
3. Before you turn in your business plan, Read Chapter 12 of “How to Develop a Business Plan. “. This will help you evaluate your business plan.

Due Date: Must be e-mailed or postmarked by 2/23/04 (DG) or 3/1/04 (videotape).