

**ASHP Center of Excellence in Medication-Use Safety**

**and Pharmacy Practice Certification Program**

**Required Documents by Document Type and Standard**

PROGRESS ACCOUNTABILITY TOOL for

Standard 1: Organizational Relationships

Standard 2: Team-Based Care

Standard 3: Leadership and Management

Standard 7: Financial Management

Standard 8: Education, Training and Research

Standard 9: People

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| **DOCUMENT TYPE** | **STANDARD** | **RESPONSIBLE**  **PERSON** | **PROGRESS** |
|  |  |  |  |
| Organizational Charts |  |  |  |
| Organizational Charts – Hospital | 1.1.b.1  1.1.b.2  1.1.1  1.1.b.1 |  |  |
| Organizational Charts - Pharmacy | 1.1.b.1  1.1.b.2  1.1.1  1.1.b.1  3.1.a  3.11.2.h  7.1.a |  |  |
|  |  |  |  |
| Process Maps/Flow Diagrams |  |  |  |
| Processes used to monitor payments and denials | 7.4.e |  |  |
| Flow diagram to show revenue cycle monitoring tools that includes review and escalation of denials and uncollected claims | 7.4.b |  |  |
| Flow diagram to show claims management processes | 7.4.f |  |  |
| Lists |  |  |  |
| Committees and Charts with Pharmacy Executive Membership | 1.1.c |  |  |
| Committees with Pharmacy Staff Members | 1.2b  1.2c  1.2d |  |  |
| Patient Care Units with Pharmacy Staff Assignments and hours of service | 2.1.a  2.2.a |  |  |
| Patient Care Units without Pharmacy Staff Assignments and hours of service | 2.1.a |  |  |
| Ambulatory Care Clinics with Pharmacy Staff Assignments and hours of service | 2.3.a |  |  |
| Ambulatory Care Clinics without Pharmacy Staff Assignments and hours of service | 2.3.a |  |  |
| Pharmacy department leadership on organizational executive committees and councils | 3.1.c |  |  |
| Pharmacy department provided CE and staff development programs | 3.12.2.a  3.12.2.b |  |  |
| Projects implemented within past 3 years describing new services or programs | 3.19.1.b |  |  |
| Pharmacy staff membership in professional organizations with involvement ion councils and committees | 3.19.3.a |  |  |
| Financial goals for past 3 years | 7.2.c |  |  |
| Responsibilities of medication revenue team members | 7.4.d |  |  |
| Training programs | 8.1.a |  |  |
| CE programs offered within 12 months and accreditation information | 8.1.d |  |  |
| Affiliations with colleges of pharmacy and number of student months for each level of trainee provided | 8.2.a |  |  |
| Preceptor appointments in colleges of pharmacy | 8.2.d |  |  |
| Active research projects and those completed within past 12 months | 8.4.1.d |  |  |
| IRB members and their disciplines | 8.4.2.a |  |  |
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| Data and Self-Audits |  |  |  |
| Pharmacy technician service performance measures | 2.1.d |  |  |
| Admission histories by pharmacy department | 2.2.a |  |  |
| Transitions of care | 2.2.a |  |  |
| Pharmacy department discharge responsibilities | 2.2.b |  |  |
| Telehealth vs. in-person care | 2.3.a |  |  |
| Disease prevention and wellness promotion programs | 2.4.a  2.5.a |  |  |
| Workload statistics | 3.17.a |  |  |
| Innovations data for new programs and services | 3.19.2.a |  |  |
|  |  |  |  |
| Self-Assessments and Gap Analyses |  |  |  |
| ISMP, PAI, Pharmacy Forecast and similar | 3.2.1.b  3.5.1.b |  |  |
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| Scorecards, Dashboards and Similar |  |  |  |
| Balanced Scorecards and dashboards – pharmacy department | 1.1.i  3.2.2.a  3.2.2.c  7.3.c  7.7.c |  |  |
| Balanced scorecards and dashboards – hospital and/or health-system | 7.7.c |  |  |
| Financial goals | 7.2.c  7.3.a  7.3.b |  |  |
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| Descriptions |  |  |  |
| Staff roles on various programs | 1.2.e |  |  |
| Practice model description | 2.1.a  2.3.a |  |  |
| Advanced roles of pharmacy technicians | 2.1.d  3.11.1.c |  |  |
| Pharmacy department responsibilities at patient discharge and post-discharge follow-up | 2.2.b |  |  |
| Examples of CMM provided | 2.5.a  4.1.1  4.1.3.a |  |  |
| Leadership roles and responsibilities for pharmacy department personnel on emergency preparedness teams | 2.6.a |  |  |
| Credentialing and privileging | 3.11.5.2.d 3.11.5.3.b |  |  |
| Career ladders or professional development programs | 3.11.5.2.b |  |  |
| Competency assessment program | 3.11.5.3.d  4.1.2.a |  |  |
| Processes used to monitor healthcare and pharmacy advancements | 3.19.1.a |  |  |
| Workload metrics used to add programs, services | 7.2.a |  |  |
| Process to monitor payments and denials | 7.4.e (see also process maps) |  |  |
| Education and training models | 8.2.b |  |  |
| Pharmacy technician training and education models | 8.3.a |  |  |
| Appointment process for instructors and preceptors for technician training programs | 8.3.c |  |  |
| Compliance with IRB peer-review requirements | 8.4.2.b |  |  |
| Well-being and resilience programs | 9.3.a |  |  |
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| Examples |  |  |  |
| New service development and implementation | 2.1.b |  |  |
| Patient care services | 2.1.c |  |  |
| Patient care responsibilities at discharge | 2.2.b (see also descriptions) |  |  |
| Disease prevention and wellness promotion programs | 2.4.a |  |  |
| CMM provided to patients in all settings | 2.5.a (see also descriptions) |  |  |
| Practice standards and guidelines compliance excellence | 3.5.2.a  3.5.2.b |  |  |
| Communication tools used to communicate new or changes in policies and procedures | 3.10.a  3.10.b |  |  |
| Orientation schedule for newly hired employees | 3.11.5.2.d |  |  |
| Training programs involving new processes | 3.12.3.a |  |  |
| Evaluation of new employee hiring processes | 3.13.2 |  |  |
| Employee performance evaluations (for on-site review) | 3.15.a  3.15.b  3.16.c  3.16.a  3.16.b |  |  |
| Competency assessment program | 3.16.a  3.16.b |  |  |
| Staffing plan and workload metrics for 3 years | 7.2.a |  |  |
| Financial goals for 3 years | 7.2.c (see also dashboards) |  |  |
| Capital budget requests for past 3 years | 7.2.g |  |  |
| Reimbursement specialist activities | 7.4.b |  |  |
| Claims management | 7.4.f (see also flow diagrams) |  |  |
| Billing processing for cognitive services | 7.4.j |  |  |
| Business growth and development | 7.7.e  7.7.f  7.7.g  7.7.h |  |  |
| Education and training models | 8.2.a (see also descriptions) |  |  |
| Programs to improve employee performance | 9.2.a  9.3.b |  |  |
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| Documents |  |  |  |
| Scope of Services | 2.1.a  2.3.a  3.3.b  3.4.a,  3.4.b  3.11.5.1  3.11.5.3.c |  |  |
| Progress towards current pharmacy goals and objectives | 3.2.1.d |  |  |
| Collaborative practice agreements | 3.11.5.4.a |  |  |
| Hospital or health-system scope of services | 4.1.3.a |  |  |
| Templates on pharmacist documentation | 4.1.4.a |  |  |
| Medication revenue team department and list of responsibilities | 7.4.d |  |  |
| Contract with IRB for services (if applicable) | 8.4.2.a |  |  |
| Career advancement ladder | 3.11.5.2.a |  |  |
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| Meeting Minutes |  |  |  |
| Pharmacy department strategic planning | 3.2.c |  |  |
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| Job Descriptions and Competence Assessment |  |  |  |
| Pharmacy technicians with advanced roles | 2.1.d  3.11.1.c |  |  |
| Pharmacists and pharmacy technicians | 3.11.1.a  3.11.4.a  3.11.5.1 |  |  |
| Pharmacy leadership team members | 3.11.2.d  3.11.2.e  3.11.2.f  3.11.2.g |  |  |
| Pharmacy executive (and functional responsibilities) | 3.11.2.a  3.11.2.b  3.11.2.d  3.11.2.e  3.11.2.f  3.11.2.g  3.11.2.I  7.1.a |  |  |
| Clinical pharmacists and clinical pharmacy specialists | 3.11.5.2.a  3.11.5.2.b |  |  |
| Reimbursement specialist plus functional responsibilities | 7.4.b |  |  |
| New and ongoing staff training and competency | 3.9.d  3.11.5.3.d  3.13.1 |  |  |
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| Stories |  |  |  |
| Pharmacy department responsibilities at patient discharge | 2.2.b |  |  |
| Demonstration of excellence in adherence to meet national and professional standards | 3.5.2.a  3.5.2.b |  |  |
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| Presentations |  |  |  |
| Overview of hospital/health-system/organization | 1.1  3.1 |  |  |
| Overview of pharmacy department and services | 2.1  2.2  2.3  2.4  2.5  2.6  3.1  3.2  3.4  8.1  8.2  8.3  8.4  9.1  9.2  9.3 |  |  |
| Process standardization and medication safety | 1.1 |  |  |
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| Policies and Procedures |  |  |  |
| Pharmacists and pharmacy technicians with reporting relationships outside of the pharmacy | 1.1.1 |  |  |
| Emergency Preparedness | 2.6b |  |  |
| Emergency response | 3.7.a |  |  |
| Infection prevention and control | 3.7.a |  |  |
| Pharmacy department compendium of policies and procedures | 3.8.1.a  3.8.1.b |  |  |
| Confidentiality and data security | 3.9c |  |  |
| Revocation of access to confidential information in IT and automation systems | 3.9c |  |  |
| Licensure review and verification | 3.11.3  3.11.3.a |  |  |
| Certification review and verification | 3.11.3  3.11.3.a |  |  |
| Monitoring process for pharmacist and pharmacy technicians with certain job requirements | 3.11.5.2.c |  |  |
| Credentialing and privileging | 3.11.5.3.a  3.11.5.3.b 3.11.5.4.d |  |  |
| Collaborative practice | 3.11.5.4.b  3.11.5.4.d |  |  |
| Professional educational support | 3.12.3.b |  |  |
| Orientation of new staff | 3.13.1 |  |  |
| Ethical conduct | 3.14.a |  |  |
| Hospital conflict of interest | 3.14.b |  |  |
| Claims management | 7.4.f |  |  |
| Bar code use in ambulatory clinics | 7.4.h |  |  |
| Bar code medication administration in ambulatory care clinics | 7.4.i |  |  |
| Cognitive services billing | 7.4.j |  |  |
| Medication procurement | 7.5.a |  |  |
| Medication contracting | 7.5.a |  |  |
| 340B medication program | 7.6.a |  |  |
| Investigational drug use | 8.4.3.a  8.4.3.b |  |  |