PHM384K Community Pharmacy Management
UNIQUE NUMBERS: 59400(AUS), 59405(SA), 59410(RGV)

Fall 2018

Class Meets: 9:30am – 10:50am Tuesdays & Thursdays
Room: PHR 4.114 in Austin and as announced on other campuses

Coordinator: Nathan D. Pope, Pharm.D. (Dr. Pope)  
Office: PHR 3.208D
Pronouns: she/he/they/zhe  
Office hours: By appointment
Email: npope@austin.utexas.edu
Phone: 512-471-5657

Instructor: Kenneth Lawson, Ph.D. (Dr. Lawson)  
Office: PHR 3.209C
Pronouns: she/he/they/zhe  
Office hours: Monday 1:00-2:00 P.M. and Thursday 1:30-2:30 P.M., or by appointment
Email: ken.lawson@austin.utexas.edu
Phone: 512-471-5609

Community Pharmacy Resident (PGY1):
Pronouns: she/he/they/zhe
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Local Campus Coordinator (RGV):
Lydia Aguilera, Pharm.D.
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Local Campus Coordinator (SA):
Kirk Evoy, Pharm.D.
Pronouns: she/he/they/zhe
Email: Evoy@uthscsa.edu

Course Description

University Catalog Course Description:
Advanced concepts in community pharmacy management for the student who plans to become a pharmacy owner or manager. Covers operational, personnel, and financial management; marketing; layout and design; and the delivery of pharmaceutical care in a community pharmacy setting. Pharmacy 326C and Pharmacy PharmD 384K may not both be counted.

Prerequisite:

What will I learn?
Main skills and attitudes to be developed:
- Entrepreneurship
- Financial Management
- Human Resource Management
- Business Planning
- Risk Management
Learning Outcomes: At the end of this course, students should be able to:

1. Lead the operations of a community pharmacy practice site and to:
   a. manage inventory costs and inventory levels or order points
   b. identify cash flow problems and apply solutions to address
   c. develop a sound business plan for clinical service programs
   d. describe basic finance terms and analyze a financial statement
   e. apply health care economics and pharmacoeconomics
   f. describe strategies for asset protection and safety
   g. effectively use pharmacy technology including:
      i. automated filling systems
      ii. prescription processing systems with contemporary features
2. Describe the concepts of quality measurement and improvement and to:
   a. apply national standards/guidelines/best practices
   b. develop a plan for quality/performance improvement
3. Effectively manage team communications and to:
   a. identify and manage conflict at all levels
   b. supervise and motivate employees
   c. delegate appropriate tasks
   d. effectively articulate team objectives and measure and report team performance


How will I learn?
You will learn through active class sessions held on Tuesdays and Thursdays. The understanding of class content will be verified with exams held throughout the semester. The exams will consist of questions in the format of multiple choice, open-ended, mathematical, short answer, or essay.

Students will participate in visits to a community pharmacy to assess and learn from how pharmacy owners or managers layout the pharmacy and the product within. Students will present results to the class in small groups. Students, in groups, will also develop a business plan for a clinical service in a pharmacy. Written plans will be submitted along with an oral presentation to the other students of the class.

Pre-requisites for the course:
Pharmacy PharmD 281L (or Pharmacy 244C).

How to succeed in this course:
This course is developed with the intent for all students to actively participate. This course is an elective and the hope is that you want to learn about this content. The more you participate, the more you will get from this course. Managing a pharmacy and managing people is not easy. It takes time and it takes practice.
Course Requirements

Required Materials
- *Pharmacy Management, Leadership, Marketing, and Finance* by Chisholm-Burns, Vaillancourt, Shepherd
  - Available via Access Pharmacy
- *NCPA Digests*
  - Available on CANVAS
- Course materials, references, readings, power point presentations, etc. will be placed on the Canvas web site. Also on this site, you can access the course syllabus, selected readings, grades, and other course resources.

Classroom expectations

Class attendance
Attendance in class is not required, but highly suggested, and you are responsible for all material covered in class and all announcements made in your absence. Class will start and end on time; late arrivals and early departures are disruptive. Please let the instructor know immediately if you have a problem that is preventing you from attending class or from performing satisfactorily in this course.

Class participation
This course is developed with the intent for all students to actively participate. This course is an elective and the hope is that you want to learn about this content. The more you participate, the more you will get from this course. Managing a pharmacy and managing people is not easy. It takes time and it takes practice.

Behavior expectations
*Professional Classroom Decorum.* All cell phones and other electronic devices must be silenced during lecture and interprofessional activities. Text messaging and e-mailing in class is prohibited. The use of cell phones, tablets, smart watches, and all other electronic devices is prohibited, unless specifically allowed for certain purposes and announced in advance of class.

Course Communications. Instructors will use Canvas, https://canvas.utexas.edu/, as the primary means of communication for course information. Students should check Canvas well in advance of each class period for any assignments due for that class. All lecture materials and web sites needed to access information for class will be posted in Canvas. Course grades will also be posted in Canvas. You can find Canvas support through the Canvas website home page.

E-mail is recognized as an official mode of university correspondence; therefore, you are responsible for reading your e-mail for university and course-related information and announcements. You are responsible to keep the university informed about changes to your e-mail address. You should check your e-mail regularly and frequently—daily is recommended, but at minimum twice a week—to stay current with university-related communications, some of which may be time-critical. You can find UT Austin’s policies and instructions for updating your e-mail address at http://www.utexas.edu/its/help/utmail/1564. Consequently “I didn’t see the e-mail” or returned mail and “Mailbox Full” or “user unknown” should not be a problem for any communication. Students are required to use their e-mail account that is part of their University record for course correspondence.

Class Recordings. If video recordings of a class are made available by the College of Pharmacy, they are intended solely for the purpose of review by students currently enrolled in that class. Faculty and students utilizing class video recordings should be careful to not compromise the privacy of either themselves or other users (http://registrar.utexas.edu/students/records/ferpa), or the rights of the presenter. Students are free to make their
own recordings of lectures for personal use only unless specifically prohibited from doing so by the presenter. Any additional distribution of College - or student-generated recordings (regardless of format) is prohibited without the written and signed permission of the presenter and students identifiable on the recording.

Assignments

**Exploring A Community Pharmacy (80 Total points = 24% of course grade)**

- Team assignment: You may do this as an individual or self-select a team of 2. Teams of 3 will not be considered.
- You will choose from a pre-selected list of pharmacies on a first-come, first-served basis.
- You must contact the pharmacy manager of the selected pharmacy to explain the assignment and receive permission to evaluate the layout and products of the pharmacy.

1. Worksheet: (15 points)
   - a. Due 10/15 @ 11:59pm
   - b. You will complete a worksheet by visiting a community pharmacy.

2. Presentations: (50 points)
   - a. Presented on 10/16 and 10/18 during class (order selected at random)
   - b. You will then present a summary of your findings to the class. Both members of the team should present equal amounts of content. This will be a 15-minute presentation. This should be concise, may contain pictures to help the class visualize, and focus on the unique aspects of your type of pharmacy.

3. Written Reflection: (15 points)
   - a. Due: 10/25 @ 11:59pm
   - b. You will then write a reflection about your experience and what you learned hearing about the unique aspects of other pharmacies. (250-word minimum)

**Clinical Service Business Plan**

- Team assignment: Self-select teams of 3 or 4
- You are to develop a new or improved clinical service for the pharmacy you visited during your visit assignment.
- See Appendix for more details

   - a. Written Plan
     - i. Due: 11/26 @ 11:59pm
   - b. Presented on 11/27 and 11/29 during class (order selected randomly)

**Grading for this Course**
The following table represents how you will demonstrate your learning and how we will assess the degree to which you have done so.

<table>
<thead>
<tr>
<th>Assignments</th>
<th>Points possible</th>
<th>Percent of Total Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Worksheet: Exploring community pharmacy</td>
<td>15</td>
<td>5%</td>
</tr>
<tr>
<td>2. Reflection: Exploring community pharmacy</td>
<td>15</td>
<td>5%</td>
</tr>
<tr>
<td>3. Presentation: Exploring community pharmacy</td>
<td>50</td>
<td>15%</td>
</tr>
<tr>
<td>4. Exam #1</td>
<td>50</td>
<td>15%</td>
</tr>
<tr>
<td>5. Exam #2</td>
<td>50</td>
<td>15%</td>
</tr>
<tr>
<td>6. Exam #3</td>
<td>50</td>
<td>15%</td>
</tr>
<tr>
<td>7. Written Business Plan</td>
<td>50</td>
<td>15%</td>
</tr>
<tr>
<td>8. Presentation of Business Plan</td>
<td>50</td>
<td>15%</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>330</td>
<td>100%</td>
</tr>
</tbody>
</table>
# Course Outline

All instructions, assignments, readings, rubrics and essential information will be on the Canvas website at [https://utexas.instructure.com](https://utexas.instructure.com). Check this site regularly and use it to ask questions about the course schedule.

**Changes** to the schedule may be made at my discretion and if circumstances require. It is your responsibility to note these changes when announced (although I will do my best to ensure that you receive the changes with as much advanced notice as possible).

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 30 (Thurs)</td>
<td><strong>No Class</strong></td>
<td></td>
</tr>
<tr>
<td>Sept 4 (Tues)</td>
<td>Developing a Business Plan/ Marketing Plan / Legal Business Structures</td>
<td>Pope</td>
</tr>
<tr>
<td>Sept 6 (Thurs)</td>
<td>Financial Statements and Terminology</td>
<td>Lawson</td>
</tr>
<tr>
<td>Sept 11 (Tues)</td>
<td>Clinical Services in the Community Pharmacy</td>
<td>Pope</td>
</tr>
<tr>
<td>Sept 13 (Thurs)</td>
<td>Ratio Analysis</td>
<td>Lawson</td>
</tr>
<tr>
<td>Sept 18 (Tues)</td>
<td>Billing for services in community Rx (Iowa Presentation)</td>
<td>Pope</td>
</tr>
<tr>
<td>Sept 20 (Thurs)</td>
<td>Break-Even Analysis</td>
<td>Lawson</td>
</tr>
<tr>
<td>Sept 25 (Tues)</td>
<td><strong>Exam #1 (7 lectures)</strong></td>
<td>Burry proctor</td>
</tr>
<tr>
<td>Sept 27 (Thurs)</td>
<td>Cost of Dispensing Prescriptions</td>
<td>Lawson</td>
</tr>
<tr>
<td>Oct 2 (Tues)</td>
<td>Prescription Pricing Strategies</td>
<td>Lawson</td>
</tr>
<tr>
<td>Oct 4 (Thurs)</td>
<td>Medicare Star Ratings / EQUIPP / DIR</td>
<td>Pope</td>
</tr>
<tr>
<td>Oct 9 (Tues)</td>
<td>Evaluation and Managing Third Party Contracts</td>
<td>Lawson</td>
</tr>
<tr>
<td>Oct 11 (Thurs)</td>
<td>Risk Management/Quality/Safety</td>
<td>Pope</td>
</tr>
<tr>
<td>Oct 16 (Tues)</td>
<td><strong>Community Pharmacy Visit Presentations</strong></td>
<td>Pope</td>
</tr>
<tr>
<td>Oct 18 (Tues)</td>
<td><strong>Community Pharmacy Visit Presentations</strong></td>
<td>Pope</td>
</tr>
<tr>
<td>Oct 23 (Tues)</td>
<td>Specialty Pharmacy</td>
<td>Jessica Haskins, WAG</td>
</tr>
<tr>
<td>Oct 25 (Tues)</td>
<td><strong>Exam #2 (6 topics + visits)</strong></td>
<td>Pope proctor</td>
</tr>
<tr>
<td>Oct 30 (Tues)</td>
<td>CPESN</td>
<td>Ben McNabb, LoveOak</td>
</tr>
<tr>
<td>Nov 1 (Thurs)</td>
<td>Human Resources: Laws/Recruitment/Hiring</td>
<td>Pope</td>
</tr>
<tr>
<td>Nov 6 (Tues)</td>
<td>Managing People / Performance Reviews</td>
<td>Pope</td>
</tr>
<tr>
<td>Nov 8 (Thurs)</td>
<td>Managing Inventory</td>
<td>Trey Burry, Tarrytown</td>
</tr>
<tr>
<td>Nov 13 (Tues)</td>
<td>Delegation</td>
<td>Mark Comfort, H-E-B</td>
</tr>
<tr>
<td>Nov 15 (Thurs)</td>
<td><strong>Exam #3 (5 topics)</strong></td>
<td>Pope proctor</td>
</tr>
<tr>
<td>Nov 20 (Tues)</td>
<td><strong>No Class</strong></td>
<td></td>
</tr>
<tr>
<td>Nov 22 (Thurs)</td>
<td><strong>Thanksgiving</strong></td>
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</tr>
<tr>
<td>Nov 27 (Tues)</td>
<td><strong>Business Plan Presentations</strong></td>
<td>Pope</td>
</tr>
<tr>
<td>Nov 29 (Thurs)</td>
<td><strong>Business Plan Presentations (cont’d)</strong></td>
<td>Pope</td>
</tr>
<tr>
<td>Dec 4 (Tues)</td>
<td><strong>No Class</strong></td>
<td></td>
</tr>
<tr>
<td>Dec 6 (Thurs)</td>
<td><strong>No Class</strong></td>
<td></td>
</tr>
</tbody>
</table>
Policies

Classroom Policies

Statement on Learning Success
Your success in this class is important to me. We will all need accommodations because we all learn differently. If there are aspects of this course that prevent you from learning or exclude you, please let me know as soon as possible. Together we’ll develop strategies to meet both your needs and the requirements of the course. I also encourage you to reach out to the student resources available through UT. Many are listed on this syllabus, but I am happy to connect you with a person or Center if you would like.

Grading Policies

<table>
<thead>
<tr>
<th>Grading Scale</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>90 - 100%</td>
</tr>
<tr>
<td>B</td>
<td>80 – 89.9%</td>
</tr>
<tr>
<td>C</td>
<td>70 – 79.9%</td>
</tr>
<tr>
<td>D</td>
<td>65 – 69.9%</td>
</tr>
<tr>
<td>F</td>
<td>&lt;65</td>
</tr>
</tbody>
</table>

Grades will be posted on Canvas. Students will have up to 7 days after exam grades are posted to review the exam and appeal their grades. Any appeals must be written or discussed in a scheduled appointment with the professor who wrote the exam, and no appeals will be accepted after the 7-day review period has expired.

Late work
Team Presentations: Attendance for the team presentations is required. An unexcused absence for the team presentations will result in a penalty of 10% deduction from total points earned on course work for presentation missed.
Assignments: A penalty of 10% deduction from the assignment’s points will occur for every 24-hour period the assignment is late. For example, the period from 0-24 hours late is a 10% deduction, the period of 24-48 hours late is a 20% deduction, etc.

Exams
• No examination or assignment grades will be dropped.
• The examinations will cover information from class presentations, handouts and assigned readings.
• After the first student leaves the exam room, no other student will be allowed to enter the room to start the exam. Also, any student leaving the exam room may not re-enter the room while the exam is in progress.
• Students with an unapproved absence from the examination will receive a score of zero for the exam. If a student cannot attend the examination at the scheduled time, the student must submit a “Student Request for Alternate Examination Time” form to the instructor in advance of the exam.
• Requests for alternate examination times should be made for illness or other legitimate conflicts—not to accommodate work schedules or other exams. In the case of approved absences, the student has one week from the day of the exam to make up the missed exam, unless other prior arrangement has been made. Students with an unapproved absence from an examination will be given zero points for that exam.

Student Rights & Responsibilities
• You have a right to a learning environment that supports mental and physical wellness.
• You have a right to respect.
• You have a right to be assessed and graded fairly.
• You have a right to freedom of opinion and expression.
• You have a right to privacy and confidentiality.
• You have a right to meaningful and equal participation, to self-organize groups to improve your learning environment.
• You have a right to learn in an environment that is welcoming to all people. No student shall be isolated, excluded or diminished in any way.

With these rights come responsibilities:
• You are responsible for taking care of yourself, managing your time, and communicating with the teaching team and with others if things start to feel out of control or overwhelming.
• You are responsible for acting in a way that is worthy of respect and always respectful of others.
• Your experience with this course is directly related to the quality of the energy that you bring to it, and your energy shapes the quality of your peers’ experiences.
• You are responsible for creating an inclusive environment and for speaking up when someone is excluded.
• You are responsible for holding yourself accountable to these standards, holding each other to these standards, and holding the teaching team accountable as well.

Personal Pronoun Preference
Professional courtesy and sensitivity are especially important with respect to individuals and topics dealing with differences of race, culture, religion, politics, sexual orientation, gender, gender variance, and nationalities. Class rosters are provided to the instructor with the student’s legal name. I will gladly honor your request to address you by a name different than what appears on the roster, and by the gender pronouns you use. Please advise me of this preference early in the semester so that I may make appropriate changes to my records.

University Policies

Academic Integrity
Each student in the course is expected to abide by the University of Texas Honor Code: “As a student of The University of Texas at Austin, I shall abide by the core values of the University and uphold academic integrity.” Plagiarism is taken very seriously at UT. Therefore, if you use words or ideas that are not your own (or that you have used in previous class), you must cite your sources. Otherwise you will be guilty of plagiarism and subject to academic disciplinary action, including failure of the course. You are responsible for understanding UT’s Academic Honesty and the University Honor Code which can be found at the following web address: http://deanofstudents.utexas.edu/sjs/acint_student.php

Q Drop Policy
If you want to drop a class after the 12th class day, you’ll need to execute a Q drop before the Q-drop deadline, which typically occurs near the middle of the semester. Under Texas law, you are only allowed six Q drops while you are in college at any public Texas institution. For more information, see: http://www.utexas.edu/ugs/csacc/academic/adddrop/qdrop

University Resources for Students
Your success in this class is important to me. We will all need accommodations because we all learn differently. If there are aspects of this course that prevent you from learning or exclude you, please let me know as soon as possible. Together we’ll develop strategies to meet both your needs and the requirements of the course. There are also a range of resources on campus:

Services for Students with Disabilities
This class respects and welcomes students of all backgrounds, identities, and abilities. If there are circumstances that make our learning environment and activities difficult, if you have medical information that you need to share with me, or if you need specific arrangements in case the building needs to be evacuated, please let me know. I am committed to creating an effective learning environment for all students, but I can only do so if you discuss your needs with me as early as possible. I promise to maintain the confidentiality of these discussions. If appropriate, also contact Services for Students with Disabilities, 512-471-6259 (voice) or 1-866-329- 3986 (video phone).
http://ddce.utexas.edu/disability/about/

Counseling and Mental Health Center
Do your best to maintain a healthy lifestyle this semester by eating well, exercising, avoiding drugs and alcohol, getting enough sleep and taking some time to relax. This will help you achieve your goals and cope with stress.

All of us benefit from support during times of struggle. You are not alone. There are many helpful resources available on campus and an important part of the college experience is learning how to ask for help. Asking for support sooner rather than later is often helpful.

If you or anyone you know experiences any academic stress, difficult life events, or feelings like anxiety or depression, we strongly encourage you to seek support. http://www.cmhc.utexas.edu/individualcounseling.html

The Sanger Learning Center
Did you know that more than one-third of UT undergraduate students use the Sanger Learning Center each year to improve their academic performance? All students are welcome to take advantage of Sanger Center’s classes and workshops, private learning specialist appointments, peer academic coaching, and tutoring for more than 70 courses in 15 different subject areas. For more information, please visit http://www.utexas.edu/ugs/slC or call 512-471-3614 (JES A332).

Undergraduate Writing Center: http://uwC.utexas.edu/
Libraries: http://www.lib.utexas.edu/
ITS: http://www.utexas.edu/its/
Student Emergency Services: http://deanofstudents.utexas.edu/emergency/

Important Safety Information:
If you have concerns about the safety or behavior of fellow students, TAs or Professors, call BCAL (the Behavior Concerns Advice Line): 512-232-5050. Your call can be anonymous. If something doesn’t feel right – it probably isn’t. Trust your instincts and share your concerns.

Title IX Reporting
Title IX is a federal law that protects against sex and gender-based discrimination, sexual harassment, sexual assault, sexual misconduct, dating/domestic violence and stalking at federally funded educational institutions. UT Austin is committed to fostering a learning and working environment free from discrimination in all its forms. When sexual misconduct occurs in our community, the university can:
1. Intervene to prevent harmful behavior from continuing or escalating.
2. Provide support and remedies to students and employees who have experienced harm or have become involved in a Title IX investigation.
3. Investigate and discipline violations of the university’s relevant policies.

Faculty members and certain staff members are considered “Responsible Employees” or “Mandatory Reporters,” which means that they are required to report violations of Title IX to the Title IX Coordinator. I am a Responsible Employee and must report any Title IX related incidents that are disclosed in writing, discussion, or one-on-one. Before talking with me, or with any faculty or staff member about a Title IX related incident, be sure to ask whether they are a responsible employee. If you want to speak with someone for support or remedies without making an official report to the university, email advocate@austin.utexas.edu For more information about reporting options and resources, visit titleix.utexas.edu or contact the Title IX Office at titleix@austin.utexas.edu.

The following recommendations regarding emergency evacuation from the Office of Campus Safety and Security, 512-471-5767, http://www.utexas.edu/safety/
Occupants of buildings on The University of Texas at Austin campus are required to evacuate buildings when a fire
Alarm is activated. Alarm activation or announcement requires exiting and assembling outside.

- Familiarize yourself with all exit doors of each classroom and building you may occupy. Remember that the nearest exit door may not be the one you used when entering the building.
- Students requiring assistance in evacuation shall inform their instructor in writing during the first week of class.
- In the event of an evacuation, follow the instruction of faculty or class instructors. Do not re-enter a building unless given instructions by the following: Austin Fire Department, The University of Texas at Austin Police Department, or Fire Prevention Services office.
- Link to information regarding emergency evacuation routes and emergency procedures can be found at: www.utexas.edu/emergency
APPENDIX: Criteria for the Clinical Service Business Plan

Criteria:

- Identifies an unmet need accurately for a new or enhanced service.
- Identifies anticipated outcome(s) appropriately for patients through implementation of a new or enhanced service.
- Identifies correct resources needed for developing and implementing a new or enhanced service.
- Develops a training plan for team members who will be delivering the new or enhanced service.
- Identifies the necessary components of and develops a complete business plan for a new/enhanced service.
- Identifies appropriate stakeholders.
- Identifies and all necessary approvals needed
- Projects the financial impact and the value of the new/enhanced service appropriately for the pharmacy, organization, and patients.
- Identifies appropriate potential revenue sources or potential sources of compensation.
- Develops a marketing strategy that is appropriate for target audience and integrated with the overall practice’s marketing plan.
- Uses appropriate presentation and persuasive skills to secure approval of the proposal for the new or enhanced service.

Components of the business plan include:

- Mission statement
- Objectives
- Desired image
- Organization (legal structure and staffing)
- Target market audience
- Description of the services and products to be offered
- Description of location (shopping center, professional building, for example)
- Market analysis of trade area (number of households, general demographics)
- Target market and marketing strategy
- Analysis of local physician/clinic dentist, veterinarian offices, hospitals, and competing pharmacies
- Marketing Plan
- Layout and design
- Details of prescription department, including all elements required by law (sinks, appliances)
- (Include special activities, such as I.V. compounding, storage, etc.)
- Pro-forma- sales forecasts, next three years
- Projections of expenses
- Cash flow projection and budget
- Capital needs/assets

The marketing plan must include:

- Mission and objectives of the pharmacy
- Budget
- Strategies
- Target market(s) demographic descriptions
- Objectives of the marketing plan
• Time line
• Pharmacy logos
• Description of media to be used—brochures, flyers, radio, billboard, in-store signage, TV, websites, radio, etc.
• Promotional content—development of pharmacy brochure is encouraged.
• Estimated cost for each phase or media used—use local area costs