

Independent Pharmacy Operations Worksheet



Optimize Operations

General Pharmacy Profile

Pharmacy Name: _____

Location: _____ Pharmacy License #: _____

Owner/Manager: _____ Date of Assessment: _____



Workflow & Operations Efficiency

Task	Who Performs It	Avg Time Taken	Bottlenecks	Improvement Ideas
<i>Prescription Intake</i>				
<i>Data Entry</i>				
<i>Verification</i>				
<i>Dispensing</i>				
<i>Patient Consultation</i>				
<i>Refill Processing</i>				
<i>Clinical Services (e.g., MTM, Immunizations)</i>				
<i>Other</i>				

Notes:

- Are any steps duplicated?
- Can technology reduce time (e.g. Med Sync and refill reminders)?
- Is the workspace layout optimal?
- Are roles clearly outlined in task procedures?

Staffing & Scheduling

Role	# of Staff	Shift Length	Peak Hours Coverage?	Training Needs
<i>Pharmacist</i>				
<i>Technician</i>				
<i>Clerks / Cashiers</i>				
<i>Delivery Driver</i>				
<i>Other</i>				

Additional Questions:

- Are staffing levels sufficient during rush hours?
- Are roles clearly defined?
- Are there ongoing staff training and performance reviews?

Policies & Procedures

Area	Existing Policy (Y/N)	Date Last Updated	Needs Revision?
<i>HIPAA Compliance</i>			
<i>Controlled Substance Handling</i>			
<i>Incident Reporting</i>			
<i>Medication Storage</i>			
<i>Immunization Protocols</i>			
<i>Emergency Procedures</i>			
<i>Other</i>			

Action Plan:

- Identify policies needing updates
- Assign responsibility for drafting and training

Workflow & Operations Efficiency

Item	Reorder Point	Current Stock	Backorders	Expired / Damaged
<i>Top 20 Fast-Moving Meds</i>				
<i>High-Cost Items</i>				
<i>Refrigerated Meds</i>				
<i>Returns/Expired</i>				
<i>Other</i>				

Inventory Review Points:

- Use of perpetual inventory?
- How are reorder points determined?
- Frequency of stock reconciliation?

Forecasting & Financial Planning

Metric	Current	Target	Notes
<i>Avg Scripts/Day</i>			
<i>Avg Revenue/Day</i>			
<i>Cost of Goods Sold</i>			
<i>Inventory Turnover Rate</i>			
<i>Profit Margin %</i>			
<i>Other</i>			

Forecasting Tips:

- Use dispensing data to forecast demand
- Consider seasonal trends (e.g. flu shots in fall/winter)
- Implement software for predictive analytics

Technology & Automation

System	In Use?	Vendor	Sufficient?	Notes
<i>Pharmacy Management System (PMS)</i>				
<i>POS System</i>				
<i>Call Routing (AI/IVR)</i>				
<i>Automated Dispensing Machine</i>				
<i>EHR Integration</i>				
<i>Other</i>				

Compliance & Accreditation

- Are all certifications up to date? (e.g. DEA, NABP, local board)
- Are you compliant with:
 - OSHA?
 - PBM audits?
 - State inspections?

Customer Experience & Marketing

Area	Yes/No	Notes
Customer Feedback System in Place?		
Loyalty Programs?		
Delivery or Curbside Pickup?		
Social Media / Online Presence?		
Community Outreach (e.g. vaccine clinics)?		
Other		

Weekly Progress & Updates

Week of	Area Reviewed	Observations	Action Items	Assigned To	Status
EXAMPLE	Workflow	e.g., bottleneck at data entry	Reassign staff 10am-1pm	John	In Progress
	Workflow				
	Inventory				
	Technology				
	Customer Service				
	Other				

Action Plan & Follow-Up

Area	Priority (H/M/L)	Responsible Person	Deadline	Status
Workflow Update				
Staff Training				
Policy Review				
Inventory Adjustment				
Marketing Plan				
Other				