# Pharmacy technician note template

*This sample template can be used by pharmacy technicians to document visits or phone calls with patients. Work with your information technology department to create a similar template in your electronic health record or make it easy for the technician to upload this form when complete. Adapt this document to fit your practice’s policies, procedures and workflows.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Patient description: *(e.g., 71-year-old female)* | | | | |
| **Reason for call:** *(e.g., medication history)* | | | | |
| **Medications patient is taking:** | | | | |
| **Updates to the electronic health record medication list:** | | | | |
| Medications discontinued: | | | | |
| Medications added: | | | | |
| Medications changed: | | | | |
| **Assessment/plan:** | | | | |
| **Patient requests refills on following medications:** | | | | |
| **Follow up:** | | | | |
| **Total time spent on encounter:** *(e.g., 30 minutes)* | | | | |
| **Routing history** | | | | |
| **Priority**  *(e.g., high, medium, low)* | **Sent on:**  *(Insert date and time here)* | **From:**  *(Insert technician name here)* | **To:**  *(Insert provider name here)* | **Message type**  *(e.g., patient call encounter)* |
|  |  |  |  |  |
| **Comment:** *(Insert detailed description of exchange with patient and summary of overall encounter)* | | | | |
| **Signature:** | | | | |
| **Date:** | | | | |

Example provided courtesy of University of Michigan Geriatrics Center.

Source: *AMA. Practice transformation series: maximizing the role of a pharmacist in your practice. 2017.*