

# London and South East Pharmacy

Medicines Optimisation Programme

Medicines Reconciliation and Transcribing for Supply

Course Handbook – August 2018



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**This handbook is valid from August 2018 – July 2019 inclusive**

## Introduction to the Medicines Optimisation Programme – Medicines Reconciliation and Transcribing for Supply Course

The Medicines Optimisation Programme aims to compliment the development and enhancement of medicines optimisation skills to support pre-registration trainee pharmacy technicians and pharmacy technicians to work competently within local services. It is designed to have a positive impact on patient care and safety.

This programme has been developed to enhance skills and knowledge delivered in the workplace. It is at the employers' discretion when a member of staff meets local standards to deliver a service and meet their job description. Successful completion of the programme will enhance a member of staffs' knowledge and skills to support demonstration of the competence standards outlined.

All candidates entered onto the Medicines Optimisation Programme must have a work based Education Supervisor (ES) who will facilitate the locally delivery of the programme.

<b>Further information is available from the Course Lead:-</b>	<b>Administrator:-</b>
Tracey Tisley Health Education England London and South East Pharmacy Crawley Hospital, 3 <sup>rd</sup> Floor, Red Wing West Green Drive, Crawley RH11 7DH Office: 01293 227144 Mob: 07741 238699 E-mail: <a href="mailto:tracey.tisley@hee.nhs.uk">tracey.tisley@hee.nhs.uk</a>	Deborah O'Dell Health Education England London and South East Pharmacy Crawley Hospital, 3 <sup>rd</sup> Floor, Red Wing West Green Drive, Crawley RH11 7DH Office: 01293 227122 E-mail: <a href="mailto:deborah.odell@hee.nhs.uk">deborah.odell@hee.nhs.uk</a>

# 1 Medicines Reconciliation and Transcribing for Supply

Medicines Reconciliation is the process of creating the most accurate list possible of all medicines a patient is taking including drug name, dosage, frequency, and route. This list is then compared against the prescriber's admission, transfer, and/or discharge orders, with the goal of providing correct medicines to the patient at all transition points within the healthcare setting.

Transcribing for Supply is the ordering of medicines/products for individual patients.

Medicines Reconciliation and Transcribing for Supply can effectively contribute to the wider Medicines Optimisation agenda ultimately support patients making the most of their medicines.

This course has been designed and mapped against the following Skills for Health National Occupational Standards (NOS):

- PHARM29.2016 Retrieve and reconcile information about an individual's medicines
- PHARM33.2016 Order medicines and products for individuals.

This course consists of two modules.

## **Module 1. Medicines Reconciliation**

## **Module 2. Medicines Reconciliation and Transcribing for Supply**

Which model or course a candidate undertakes will be determined by their job role.

Training will include work based shadowing, completion of in-house and on-line learning, observations of practice, appraisal and self-reflection.

Assessment of competence will be through an on-line summative assessment, work based evidence and a summative Objective Structured Clinical Examination (OSCE) . Work based evidence will include witnessed tasks, summative appraisal and sign-off by an Educational Supervisor (ES).

**The maximum amount of time a candidate has to complete the programme is 12 months from the course start date. There is no minimum time requirement.**

## 1.1 Learning Outcomes

By the end of the course, the candidate will be able to:

### Core Skills

Communicate effectively within the Medicines Optimisation role

Obtain patient consent and take appropriate action if consent is not given

Maintain patient confidentiality

Identify risks and refer to an appropriate person

### Medication Reconciliation

- Understand the Medicines Reconciliation process
- Accurately complete, verify and record medication histories
- Reconcile the verified medication history with the most recent prescription available
- Practice a structured consultative approach to medicines reconciliation
- Demonstrate the ability to build discussions about medicines-taking into practice
- Discuss new developments that support transfer of care
- Identify discrepancies in medicines against prescribe items and take appropriate action

### Transcribing for Supply

- Review patient medication records and assess the patient's current supply
- Transcribe legibly and accurately medication orders with instructions for labelling so that the medicines can be dispensed for the patient.

Both modules will support the development of underpinning skills, specifically: -

- Communication
- Interpersonal skills
- Time management
- Problem solving
- Provision of relevant medicines related information
- Accurate and legible record keeping
- Awareness of own limitations and scope of role
- Identify the information needs of specific patients around medicines and their use
- Describe the rationale for providing a medicines reconciliation service
- Complete a detailed medicines reconciliation using the relevant documentation
- Demonstrate effective communication with patients, colleagues and health care professionals in a clinical environment
- Professionally document their contributions to patient care

## 1.2 Curriculum Overview

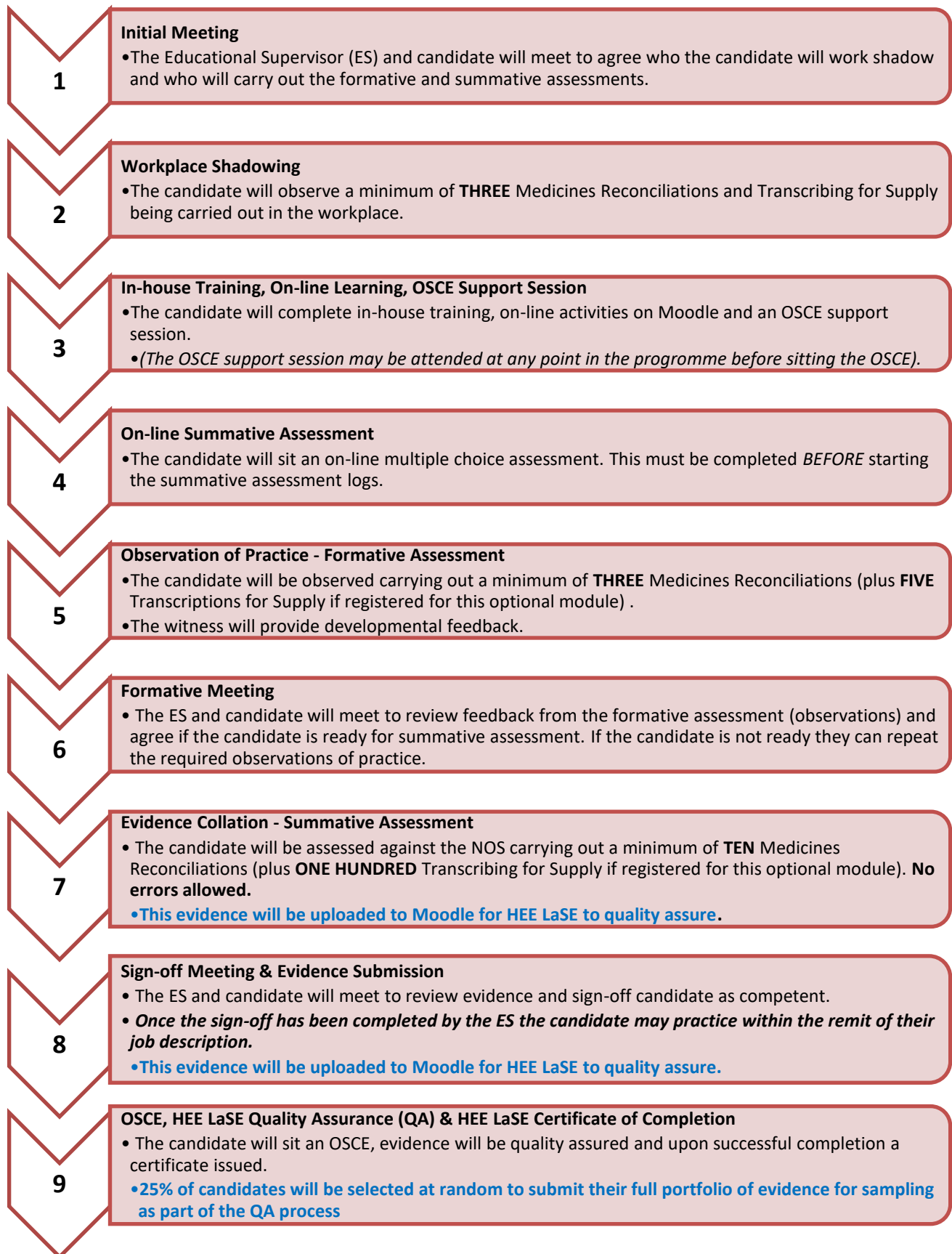
The course will comprise of nine stages. Each stage must be completed in order before moving on to the next. Candidates will not be able to progress beyond Stage 4 and download the summative assessment forms until they have successfully completed and passed the on-line summative assessment.

course will comprise of nine stages:

1. Initial Meeting
2. Workplace Shadowing
3. In-house Training, OSCE Support Session & On-line Learning
4. On-line Summative Assessment
5. Observation of practice - Formative Assessment
6. Formative Meeting
7. Evidence Collation - Summative Assessment
8. Sign-off Meeting & Evidence Submission
9. OSCE, HEE LaSE Quality Assurance & Certificate of Completion

Each of the above stages will be clearly detailed within Moodle, our virtual learning environment. The flow chart on the following page is a useful reference for both candidates and their ESs to check what needs to be done when. It is advised that the ES uses this in the initial meeting stage to ensure candidates have a clear understanding of what the course entails.

## Medicines Reconciliation plus *optional* Transcription for Supply Module



Further detail is described under the relevant sections of the course handbook.

### 1.3 Initial Meeting

When a candidate starts this course, it is essential they meet with the ES. Ideally, the initial meeting should take place within two weeks of the course start date. During the meeting they will agree all the resources needed for successful completion, including who will be involved in the training and assessment and when. This includes who may act as a witness and the dates of activities such as workplace shadowing, observations and on-line learning.

The ES will complete the initial meeting form, it will also be signed by the candidate. The form is available to download from the Moodle platform by the candidate, a hard copy is also available in appendix C. Once completed this should be added to the candidate's portfolio of evidence.

### 1.4 Workplace Shadowing

Candidates will observe the following being carried out with **THREE** different patients in the workplace.

Module 1. A minimum of **THREE** Medicines Reconciliations

Module 2. a minimum of **THREE** Medicines Reconciliations and **THREE** Transcribing for Supply

The ES is responsible for agreeing who is suitable for the candidate to observe. This could be the ES or a practitioner. The practitioner must be competent and currently carrying out Medicines Reconciliation and Transcribing for Supply, they must have the capacity to do this in a timely manner (within the first two weeks of commencing the module) and allow the candidate to ask questions about the observations. This will be documented at the initial meeting.

Workplace shadowing will give the candidate an understanding and insight into the role before they start their training.

### 1.5 In-house Training, OSCE Support Session & On-line Learning

The in-house training and on-line learning has core lessons that are the same for both modules as it is necessary to understand the holistic process to allow the candidate to contribute effectively to Medicines Optimisation – Medicines Reconciliation and Transcribing for Supply within their role.

The training within the modules has been designed and mapped against the Skills for Health National Occupational Standards (NOS):

- PHARM29.2016 Retrieve and reconcile information about an individual's medicines
- PHARM33.2016 Order medicines and products for individuals.

The following tables list these NOS and detail the delivery method for each individual standard.



**PHARM29.2016 Retrieve and reconcile information about an individual's medicines**

	<b>KNOWLEDGE AND UNDERSTANDING</b>	<b>Method of delivery</b>
	The candidate will need to know and understand:	
<b>1</b>	the Standard Operating Procedures and the importance of adhering to them at all times	<b>In-house training</b>
<b>2</b>	the importance of working within the limits of your competence and authority, when to seek agreement or permission from others and when to refer on to an appropriate person	<b>In-house training &amp; on-line learning</b>
<b>3</b>	current health and safety legislation and how it applies to the working environment	<b>In-house training</b>
<b>4</b>	legal, organisational and policy requirements relevant to your role, the role of others in your organisation and the activities being carried out	<b>In-house training &amp; on-line learning</b>
<b>5</b>	the relevant national and local guidelines, policies and procedures that are available and how and when they should be accessed	<b>In-house training &amp; on-line learning</b>
<b>6</b>	the importance of adhering to information governance policies and maintaining confidentiality when sharing information about individuals with others	<b>In-house training</b>
<b>7</b>	the duty to report any acts or omissions that could be detrimental to individuals, yourself, colleagues or your employer	<b>In-house training</b>
<b>8</b>	methods of enabling effective communication and supporting individuals to communicate their needs, views and preference	on-line learning
<b>9</b>	the importance of involving individuals in discussion and how this can be achieved	<b>In-house training &amp; on-line learning</b>
<b>10</b>	the purpose of confirming the suitability of an individual's own medicines against Standard Operating Procedures	<b>In-house training &amp; on-line learning</b>
<b>11</b>	the appropriate documentation required for recording information following assessment of medicines	<b>In-house training</b>
<b>12</b>	the prescribing conventions, abbreviations and medical terminology	<b>In-house training &amp; on-line learning</b>
<b>13</b>	the different formulations of medicines	on-line learning
<b>14</b>	the factors which affect the security and storage of medication including expiry dates	on-line learning
<b>15</b>	factors that may affect how medicines are taken	<b>In-house training &amp; on-line learning</b>
<b>16</b>	the psychological, occupational and social aspects and implications for individuals living with conditions	on-line learning
<b>17</b>	the labelling requirements for medicines	<b>In-house training &amp; on-line learning</b>
<b>18</b>	legislation surrounding medicines not licensed in the UK within your scope of practice	on-line learning
<b>19</b>	the use of compliance aids	<b>Local procedures</b>
<b>20</b>	the regulations related to the destruction of medicines	on-line learning
<b>21</b>	legislation and organisational processes relating to obtaining valid consent	<b>In-house training &amp; on-line learning</b>
<b>22</b>	the actions to take if valid consent is not obtained	<b>In-house training</b>
<b>23</b>	the importance of recording, storing and retrieving information in accordance with organisational procedures	<b>In-house training &amp; on-line learning</b>

## PHARM33 Order medicines and products for individuals

	<b>KNOWLEDGE AND UNDERSTANDING</b>	<b>Mode of delivery</b>
	The candidate will need to know and understand:	
<b>1</b>	the Standard Operating Procedures and the importance of adhering to them at all times	<b>In-house training</b>
<b>2</b>	the importance of working within the limits of your competence and authority, when to seek agreement or permission from others and when to refer on to an appropriate person	<b>In-house training &amp; on-line learning</b>
<b>3</b>	current health and safety legislation and how it applies to the working environment	<b>In-house training</b>
<b>4</b>	legal, organisational and policy requirements relevant to your role, the role of others in your organisation and the activities being carried out	<b>In-house training &amp; on-line learning</b>
<b>5</b>	the relevant national and local guidelines, policies and procedures that are available and how and when they should be accessed	<b>In-house training &amp; on-line learning</b>
<b>6</b>	the importance of adhering to information governance policies and maintaining confidentiality when sharing information about individuals with others	<b>In-house training</b>
<b>7</b>	the duty to report any acts or omissions that could be detrimental to individuals, yourself, colleagues or your employer	<b>In-house training</b>
<b>8</b>	the local procedure for ordering medicines for individuals	<b>In-house training</b>
<b>9</b>	the local documentation required for placing an order	<b>In-house training</b>
<b>10</b>	the different forms of medicines and why it is important to order appropriate quantities of the correct form and strength	on-line learning
<b>16</b>	the regulations related to the destruction of medicines	on-line learning
<b>11</b>	the factors which affect the storage of medication including expiry dates	on-line learning
<b>12</b>	issues that may affect how medicines are taken	<b>In-house training</b>
<b>13</b>	the labelling requirements for medicines	<b>In-house training &amp; on-line learning</b>
<b>14</b>	legislation surrounding medicines not licensed in the UK within your scope of practice	on-line learning
<b>15</b>	the use of compliance aids	<b>In-house training</b>
<b>17</b>	legislation and organisational processes relating to obtaining valid consent	<b>In-house training &amp; on-line learning</b>
<b>18</b>	the actions to take if valid consent is not obtained	<b>In-house training</b>
<b>19</b>	methods of enabling effective communication and supporting individuals to communicate their needs, views and preferences	on-line learning
<b>20</b>	the use of appropriate questioning techniques to obtain relevant information	on-line learning
<b>21</b>	the importance of establishing the requirements of individuals clearly and accurately	<b>In-house training &amp; on-line learning</b>
<b>22</b>	the importance of verbal and non-verbal communication when communicating with individuals	<b>In-house training &amp; on-line learning</b>
<b>23</b>	how to give clear and accurate information and check the individual's understanding	<b>In-house training &amp; on-line learning</b>
<b>24</b>	the source(s) of information that can be accessed and the information that can be given to individuals by you and other colleagues	<b>In-house training &amp; on-line learning</b>
<b>25</b>	the importance of recording, storing and retrieving information in accordance with organisational procedures	<b>In-house training &amp; on-line learning</b>

### **In-house training**

The ES is responsible for ensuring that candidates are provided with all the In-house training as mapped in the above tables. Some of this will be achieved through trust mandatory training. The remaining will be achieved through in-house training is delivered by the ES or a person deemed suitable by the ES. This may be through a variety of methods including and not limited to reading procedures, during induction, discussions, or more formal training.

Candidate's must have current mandatory training including:

- Fire safety
- Health and safety
- Infection prevention and control
- Data security awareness
- Equality & diversity
- Safeguarding children (if applicable)
- Safeguarding adults (if applicable)
- Conflict resolution (if applicable)
- Manual handling
- Error reporting
- Organisational values and behaviours/code of conduct

It is the candidate's responsibility to ensure they are up to date with all Trust mandatory training as listed above and the ES will be required to verify this. It must include all the knowledge and understanding as indicating in the tables above.

### **Objective Structured Clinical Examination (OCSE) Support Session**

An OSCE is an Objective Structured Clinical Examination. To support candidates with the summative OSCE it is a course requirement that candidates attend an OSCE support session. This should be delivered locally in-house, please check with your ES as to where and when this will be delivered during the training. Ideally, this should be planned and a date agreed during the initial meeting.

The purpose of the OSCE Support Session is to practice medicines reconciliation within a protected environment and to debate and discuss practical challenges and issues that can arise while working within medicines optimisation – Medicines Reconciliation. This session may be attended at any stage during the course.

The OCSE Support Session will be in your workplace, facilitated by the ES or a person deemed suitable by the ES. HEE LaSE provide standardised training materials and resources for the OSCE Support Session which the ES can adapt to suit individual trusts scope of practice.

**On-line Learning** - <https://moodlelasepharmacy.hee.nhs.uk>

Moodle is the virtual learning environment where on-line learning is undertaken, course paperwork and resources are available (including links to useful websites and reference sources) and coursework submitted.

The online learning is split into the 9 stages of the curriculum and Moodle has clear instructions including estimated time to complete activities. Each stage should be completed in turn before moving on to the next. If there is documentation that needs to be completed at a particular stage it will be available for download within that stage.

The on-line learning is only accessible by the candidate. The platform does not permit the ES to view individual candidates progress. However, candidates will not be able to progress beyond Stage 4 and download the summative assessment forms until they have successfully completed and passed the on-line summative assessment. With this in mind, ESs may prefer to ask the candidate to download the summative assessments forms.

It is the employers' responsibility to ensure up to date browsers are in use for candidates to be able to access the Moodle site. If a trust does have an outdated default browser an alternative such as Firefox and Google Chrome can be used to access the Moodle site.

## **1.6 On-line Summative Assessment**

On completion of the on-line learning and in-house training the candidate will sit an on-line multiple choice assessment. The on-line summative assessment will be self-marking.

Candidates are allowed **TWO attempts** at passing the on-line summative assessment for each module. If candidates are unsuccessful, please contact the Course Lead.

## **1.7 Observation of practice - Formative Assessment**

Formative Assessment is made up of observations of practice in the workplace, which aims to support candidates with identifying areas for development before they commence their summative assessment.

During this period the candidate will practice and develop the skills to carry out Medicines Reconciliations or Medicines Reconciliations and Transcribing for Supply. Initially the candidate completes

Module 1. a minimum of **THREE** Medicines Reconciliations or

Module 2. a minimum of **THREE** Medicines Reconciliations and **FIVE** Transcribing for Supply.

Ideally the formative assessment should **not** be completed on the same day as this does not demonstrate consistency over time.

If the candidate is undertaking Module 2. Medicines Reconciliation and Transcribing for Supply; when carrying out medicines reconciliation if they find an item to be unsuitable for use or insufficient, they should complete a transcription to order and use this as the Transcribing for Supply evidence. Please note that HEE LaSE expect the number of medicines reconciliations will exceed three to support five Transcribing for Supply. The candidate should continue recording the medicines reconciliations until the five Transcribing for Supply is met.

The candidate will be observed by the ES or witnessed by a person deemed suitable by the ES. The ES is responsible for agreeing who is suitable to observe the candidate (this should be documented at the initial meeting). They must be competent, currently carrying out Medicines Reconciliations and Transcribing for Supply. They must have the capacity to do this in a timely manner and give the candidate developmental feedback.

The ES or witness will complete the formative assessment form and give feedback on the candidate's performance. The form is available to download from the Moodle platform by the candidate, a hard copy is also available in appendix C. Once completed this should be added to the candidate's portfolio of evidence

## 1.8 Formative Meeting

The ES will meet with the candidate and using the feedback from the formative assessment forms and the candidate's personal reflection on their practice, decide if the candidate is ready to move to the next stage of the course. The formative meeting will highlight any areas of good practice and areas for development, informing the next steps. If candidate and ES agree, the candidate should move on to the summative assessment. If, however the candidate is not ready for the summative assessment or the formative observations of practice highlight further development needs then the formative assessment should be repeated. HEE LaSE do not limit the number of times the formative assessment can be taken.

The formative assessment meeting form consists of two sections, the first to be completed by the ES and the second to be completed by the candidate. The form is available to download from the Moodle platform by the candidate, a hard copy is also available in appendix C. Once completed this should be added to the candidate's portfolio of evidence.

## 1.9 Evidence Collation- Summative Assessment

Summative assessment is made up of witnessed observation of practice against the NOS in the workplace.

The ES is responsible for agreeing who is/are suitable witness(es). They must be competent and currently carrying out Medicines Reconciliations and Transcribing for Supply and have the capacity to undertake this role. This will be documented at the initial meeting. It is recommended that the ES witnesses some Medicines Reconciliations or Medicines Reconciliations and Transcribing for Supply. ***N.B. the ES is responsible for the final sign-off, declaring the candidate as competent.***

The candidate will carry out:

Module 1. a minimum of **TEN** Medicines Reconciliations or

Module 2. a minimum of **TEN** Medicines Reconciliations and **ONE HUNDRED** Transcribing for Supply.

If the candidate is undertaking Module 2. Medicines Reconciliation and Transcribing for Supply; when carrying out medicines reconciliation if they find an item to be unsuitable for use or insufficient, they should complete a transcription to order and use this as the Transcribing for Supply evidence.

The candidate will use the summative assessment forms when completing the Medicines Reconciliations and Medicines Reconciliations and Transcribing for Supply, these will be signed by the agreed witness(es) and ES. The form is available to download from the Moodle platform, a hard copy is available in appendix C.

The ES or witness should ensure that the candidate meets the appropriate performance criteria in the Skills for Health NOS when carrying out a Medicines Reconciliation or Transcribing for Supply.

These NOS are:

- PHARM29.2016 Retrieve and reconcile information about an individual's medicines
- PHARM33.2016 Order medicines and products for individuals as appropriate

### PHARM29.2016 Retrieve and reconcile information about an individual's medicines

<b>PERFORMANCE CRITERIA</b>	
You must be able to do the following:	
1	work within the relevant Standard Operating Procedures including the relevant health and safety procedures and within your own limits of competence
2	ensure that the environment and timing is suitable for open and confidential discussion with the individual or third party about their medicines
3	communicate with the individual and key people at a pace, in a manner and at a level appropriate to the individual's understanding, preferences and needs
4	explain your role and responsibilities, introduce yourself and check the individual's identity according to local guidelines before retrieving an individual's medication history relevant to your work area
5	obtain valid consent from the individual or third party in accordance with Standard Operating Procedures
6	check the individual's or third party understanding of the purpose of retrieving an individual's relevant history
7	check and record the individual's allergy status
8	use appropriate questions to explore, clarify and confirm any unusual or ambiguous information and record the information clearly and accurately in a systematic manner
9	identify and document the medicines and other substances, and ascertain from appropriate sources when and how they are taken by the individual
10	use appropriate sources to identify details that are relevant to the individual's medication history including: <ol style="list-style-type: none"> <li>1. medicines that have been started recently</li> <li>2. medicines that have stopped</li> <li>3. medicines that have changed</li> <li>4. medicines that are used regularly</li> <li>5. medicines that are used occasionally</li> <li>6. medicines that are swapped or shared between individuals or their family and friends</li> <li>7. medicines that are bought from other sources</li> <li>8. if the individual drinks alcohol, smokes or uses other substances</li> <li>9. if the individual has experienced any problems or difficulties with their medication</li> </ol>
11.	report any problems, inconsistencies or adverse reactions that the individual may have experienced from their medication in line with Standard Operating Procedures
12.	reconcile and compare the medication history to the individual's current list of medicines
13.	identify and document any discrepancies, changes, deletions or additions
14.	complete all relevant documentation and store appropriately in accordance with legal and organisational requirement

### PHARM33 Order medicines and products for individuals

<b>PERFORMANCE CRITERIA</b>	
You must be able to do the following:	

1	communicate with the individual and key people at a pace, in a manner and at a level appropriate to the individual's understanding, preferences and needs
2	work within the relevant Standard Operating Procedures including the relevant health and safety procedures and within your own limits of competence
3	explain to the individual the purpose of ordering their individual medicines or products
4	review the individual's medication record to identify the correct medicines or products to be ordered
5	assess the individual's current supply of medicines or products prior to placing the order
6	identify any issues with the individual's current supply of medicines or products and take the appropriate action to rectify any issues
7	order the medicines or products in accordance with organisational procedures, to include: 1. the correct details of the individual 2. appropriate dosage form 3. correct strength 4. correct quantity 5. correct instructions 6. correct medicine brand, where appropriate 7. timescale for the order, if appropriate
8	where any issue required is outside the remit of your role, refer on to the appropriate person
9	complete all relevant documentation and store appropriately in accordance with legal and organisational requirements
10	confirm the accuracy of the generated order including transcription, where appropriate

### Errors

If there are any errors detected by an agreed witness or ES in the ten Medicines Reconciliations or one hundred Transcribing for Supply, the assessment must stop. The candidate should complete a Reflective Practice Log. The candidate and ES should meet to discuss the error, allow for reflection and agree any action. It may be agreed that the candidate should repeat the formative assessment. Then once that candidate feels confident they must restart their ten Medicines Reconciliations or one hundred Transcribing for Supply from the beginning.

Candidates are allowed **TWO** attempts at passing the workplace summative assessment for each element; Medicines Reconciliations or Transcribing for Supply. If candidates are unsuccessful, please contact the Course Lead.

### 1.10 Sign-off Meeting & Evidence Submission

Upon successful completion of the summative assessments the ES will meet with the candidate and complete a sign-off meeting form confirming the candidate has completed the in-house training programme demonstrated competence against the course learning outcomes and National Occupational Standards, completed the summative assessment and that the candidates' practice meets the trust's policies and procedures. The form is available to download from the Moodle platform, a hard copy is available in appendix C.

Once the sign-off has been completed by the ES, the candidate may practice within the remit of their job description unsupervised. Please note, this does not include preregistration trainee pharmacy technicians who must be supervised as per GPhC requirements until they have registered with the GPhC.

### Submission of Evidence

All evidence should be kept in the candidate’s portfolio of evidence within the workplace. This may be stored as a hard copy or digitally, **but all patient identifiable data must be removed.**

The candidate must also upload the evidence of completion onto the Moodle platform. The easiest way to do this is to scan the evidence as a PDF document (further guidance on uploading evidence is available on Moodle). Only the formative assessment and sign-off meeting forms need to be uploaded to Moodle for quality assurance.

Module 1 - Medicines Reconciliation	Where to upload on Moodle
<ul style="list-style-type: none"> <li>Medicines Reconciliations, minimum of 10</li> <li>Completed sign-off meeting form</li> </ul>	Upload to stage 7 Upload to stage 8
Module 2 - Medicines Reconciliation and Transcribing for Supply	Where to upload on Moodle
<ul style="list-style-type: none"> <li>Medicines Reconciliations, minimum of 10</li> <li>Transcribing summative assessments, minimum of 100 items</li> <li>Completed sign-off meeting form</li> </ul>	Upload to stage 7 Upload to stage 7 Upload to stage 8

It is advised that the evidence submitted demonstrates a broad range of patient and medication types. *It is the educational supervisor’s responsibility to ensure the standard of work and the Trust scope of practice is covered for each of the modules submitted.*

### 1.11 Objective Structured Clinical Examination (OSCE), HEE LaSE Quality Assurance & Certificate of Completion

Should candidates and employers require certification to demonstrate standardised practice, candidates are invited to apply for an OSCE. The OSCE includes four stations, used as an objective assessment of competence in Medicines Reconciliation. These assessments are organised by HEE LaSE Pharmacy and are run four times a year. Please note, if the minimum quorate is not met for an OSCE assessment it will be cancelled and candidates will be deferred to the following assessment.

All candidates registered for the Medicine Reconciliation or Medicines Reconciliation and Transcribing for Supply modules must complete the OSCE assessment within 12 months of the course start date.

To be eligible to sit the OSCE assessment candidates must have completed the required evidence submission and had their ‘sign-off meeting’ with their ES. These must be uploaded no later than one month prior to the OSCE date. Late submissions will result in the candidate being deferred to the following OSCE. Candidates should seek agreement from their ES if they are registering for the OSCE assessment prior to the sign-off meeting to ensure this is achievable.

Candidates will be permitted to attempt the summative OSCE twice. There may be a recommendation or a requirement to undertake relevant remedial work prior to registration for a re-sit examination. This is determined by the Exam Board. Trusts will be charged for their candidate to re-sit the OSCEs. The current cost is £50.00 per candidate.

#### Quality Assurance



HEE LaSE OSCE assessments are governed by an Exam Board. 25% of the cohort's assessments will be sampled by the Exam Board. Each ES will have their assessment practice sampled a minimum of once every two years. The Course Lead supported by the Exam Board will check that the correct documentation has been submitted and that there are no Medicines Reconciliation or Transcribing of Supply errors. Once the quality assurance check is complete and they are satisfied that the assessment requirements have been met a certificate will be issued.

### **Errors**

During the quality assurance if there are any errors detected in the ten medicines reconciliations or one hundred Transcribing for Supply, the ES will be contacted. The ES should explain why this error was not detected or why they have allowed it to be submitted. Then the candidate must restart their ten medicines reconciliations or one hundred Transcribing for Supply.

Candidates are allowed **TWO** attempts at passing the Summative Assessment for each element; Medicines Reconciliations or Transcribing for Supply. If the candidate has already had two attempts, then the Course Lead and ES will agree the appropriate action. This will be discussed at the next Exam Board where any further action that might be required will be agreed.

### **Certification of Completion**

Certificates of completion will be issued after a successful quality assurance check.

As the certificate issued by HEE LaSE is a certificate of completion and not an accreditation there is no need requirements for re-accreditation.

Pre-registration trainee pharmacy technicians will need to demonstrate their continuing fitness to practice to their employer through local arrangements: this may be supported by evidence from local audits, peer review and appraisals.

Pharmacy technicians are a registered profession. Pharmacy technicians will need to demonstrate their continuing fitness to practice to their employer through local arrangements: this may be supported by evidence from local audits, peer review, appraisals and CPD.

### **A break in practice**

It is an employer's responsibility to ensure that employees are competent to carry out tasks. Following any break in practice it is good practice that individuals receive a re-introduction to the role, during which time they are supported as they refresh their knowledge and skills before returning to work unsupervised.

## **2 Responsibilities throughout the programme**

### **2.1 Responsibility of the candidate**

This is a self-directed programme and although candidates will have a work-based ES to support and guide them, they are expected to proactively progress through the programme themselves.

It is the responsibility of the candidate to:

- Be familiar with the Trust Scope of Practice for Medicines Optimisation – Medicines Reconciliation and Transcribing for Supply and ensure that they only ever work within this
- Inform their Educational Supervisor of any specific training needs they may have, and agree the support and guidance they may require when working towards completion of the module(s)/course(s)
- Read and comply with the current Standards for Pharmacy Professionals issued by the GPhC<sup>1</sup>
- Fulfil all responsibilities outlined in their job description and comply with all trust and departmental policies and procedures relating to the role they will be undertaking, including patient confidentiality/ Data Security Awareness
- Become familiar with the requirements of the Medicines Optimisation – Medicines Reconciliation and Transcribing for Supply programme module(s) they are preparing to undertake
- Attend all face to face teaching sessions and complete on-line learning activities which are part of the programme
- Inform the ES/line manager of any concerns/issues with working in an environment e.g. ward setting or consultation room
- Meet regularly with their allocated ES
- Take responsibility for their own learning and actively seek opportunities to cover the range of experiences and gather the required evidence

## 2.2 Role of the Educational Supervisor (ES)

The role of the ES is to ensure that candidates undertaking the course have the appropriate training utilising in-house materials. The ES is responsible for supporting the candidate through the course.

There is no formal training to be an ES for this course, the course handbook provides all the details to build on materials and infrastructure already in place.

An ES can be anyone who is competent and has the responsibility to do so. Please note that each time a candidate applies, the ES will also receive a copy of the course handbook which outlines the responsibilities.

The role of the ES does not normally need to be reviewed. However, if concerns are identified through sampling a candidate's evidence of competence, suitability will be reviewed and further training may be required. This will be discussed at the next Exam Board where any further action that might be required will be agreed. The Course Lead will feed this back to the employing organisation.

### Requirements to become an Educational Supervisor must

- Must be included in the job description
- Have the capacity to carry out the role effectively and in a timely manner
- Have the autonomy to deal with issues and concerns
- Have previous experience of POD assessment and Transcribing for Supply and current knowledge and understanding of the role
- Be familiar with the course requirements

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<sup>1</sup> General Pharmaceutical Council. GPhC Standards for pharmacy professionals:

[https://www.pharmacyregulation.org/sites/default/files/standards\\_for\\_pharmacy\\_professionals\\_may\\_2017\\_0.pdf](https://www.pharmacyregulation.org/sites/default/files/standards_for_pharmacy_professionals_may_2017_0.pdf)

It is the responsibility of the Educational Supervisor to:

- Ensure candidates are given the support and opportunity to complete the activities outlined to achieve the agreed module(s)/course(s) learning outcomes by liaising with other team members
- Provide candidates with fair assessment opportunities with timely constructive feedback on performance with regards to the programme of study
- Liaise with the candidate's line manager in relation to progress and assessment decisions
- Sign-off the candidate's evidence of competence when all learning outcomes have been achieved within the agreed deadline
- Report any concerns about candidate's performance with special regards to patient safety to the line manager and Course Lead in a timely manner
- Raise with the Course Lead, any organisational or operational concerns that may be detrimental to candidate progress or performance
- Deliver OCSE Support Sessions
- Each Educational Supervisor is expected to attend and support a minimum of one regional OSCE assessment in an 18 month period.

### **2.3 Role of the Witness**

The Witness is responsible for undertaking assessments under the instruction of the Educational Supervisor.

They should:

- Undertake summative assessments of candidates in a timely manner
- Assess accurately and fairly
- Provide timely and developmental feedback to the candidate
- Feedback regularly to the ES on progress, assessment decisions and any concerns

## 2.4 Role of the Employer

The Chief Pharmacist has overall responsibility for the quality of Medicines Optimisation – Medicines Reconciliation and Transcribing for Supply provided by their department. It is the role of the employer to ensure:

- Anyone enrolled in the programme is employed in a role that enables them to safely and effectively utilise their Medicines Optimisation – Medicines Reconciliation and Transcribing for Supply skills. Their job description must reflect this.
- There is adequate supervision while the candidate is in training to assure patient safety.
- There are up to date SOPs in place for candidates to work within.
- Candidates have adequate and protected time to attend/ complete learning activities and to be assessed – both within the workplace and externally

## 2.5 Role of HEE LaSE Pharmacy

HEE LaSE Pharmacy is responsible for the overall design, delivery, assessment and ongoing review of the programme. In addition, it holds a central record of all candidates that have completed the Medicines Optimisation – Medicines Reconciliation and Transcribing for Supply modules/courses with within London and South East. Specific activities within this include:

- Design of on-line learning to ensure candidates have a solid grounding in the knowledge required before applying them in practice and which meets the principles of the National Medicines Management Programme
- Quality assurance
- Design and manage the assessment process including the appointment of an external examiner and running of exam boards
- Oversee and manage the appeals process
- Annually review and evaluate the programme
- Keep records of successful candidates which state:
  - Candidate name
  - Employing organisation
  - Date of completion
  - Modules completed

## 2.6 Extension Procedure

Candidates are responsible for the submission of their work within the course deadlines. The maximum amount of time a candidate has to complete the course and assessments is 12 months from the start date which are advertised on HEE LaSE Pharmacy website. There is no minimum amount of time to complete.

If a candidate is aware that they will not meet the 12 month deadline, they must discuss this with their Education Supervisor and contact their Course Lead before the deadline. **It will not be normal policy to grant an extension.**

## 2.7 Exam Board

The Examination Board consists of:

- Course Lead – Chair
- External Examiner
- Course Educational Supervisors
- Regional Medicines Management/Clinical Leads
- Medicines Management Pharmacy Technicians

The Examination Board meets following each OSCE Examination to review and confirm all grades relevant to making final awards to candidates and to monitor consistency and quality of the examination and materials.

A marking panel consisting of members from the Examination Board perform a quantitative assessment of all e-Portfolios that have been signed off by the Educational Supervisor to ensure all modules have been completed to the required standard.

OSCE Examination results will be sent to candidates and their Educational Supervisors within 4 weeks after the assessment date.

## 2.8 Appeals

Any candidate who is dissatisfied with the conduct or adequacy of an assessment must give notice of their dissatisfaction and of their intention to forward an appeal to the Appeals Officer. The notification must be given within 5 working days of their assessment or 5 working days of the receipt of their results.

The formal appeals procedure must then be followed:

- All appeals against the conduct, adequacy or outcome of an assessment must be forwarded in writing to the Appeals Officer within 10 working days of the candidate having given notice of their intention to appeal.

On receipt of an appeal the Appeals Officer will:

- Set a date for the appeal to be heard
- Decide how and by whom the appeal will be heard.
- The appeals will be processed within 20 working days of the Appeals Officer receiving written notification of the appeal.
- The candidate will be offered the opportunity to be accompanied by any person of their choice to help with the presentation of evidence if requested by the Appeals Officer.
- The appeals officer will reach a decision on the day stated.
- All involved parties will receive written notification within 3 working days of the hearing.

The decision of the Appeals Officer is final. The Appeals Officer is Liz Fidler.

## Appendix A - Standard Operating Procedures (Reading List)

### Why do I need to read these?

Standard operating procedures (SOPs) are essential to ensure that employees comply with clinical governance requirements. They are designed to ensure that good practice is achieved at all times and to avoid confusion over who does what (role-clarification). Each trust will adopt their own procedures which apply to the type of practice base and patient groups they care for, for this reason HEE LaSE Pharmacy do not undertake to teach any SOPs as part of this programme.

In your OSCE you are expected to adhere to your local SOPs, however if you fail for carrying out a practice not deemed acceptable by the Exam Board you have the right to appeal this decision providing you can provide evidence that you were adhering to your local SOP.

<b>The following local SOPs must be read, if available (*where applicable to individual practice based setting). N.B. Names of policies may vary slightly between Trusts</b>	
<u>Medicines SOPs</u> <ul style="list-style-type: none"><li>➤ Medicines Reconciliation Policy</li><li>➤ Medicines Policy</li><li>➤ Use of patients' own drugs (including consent)</li><li>➤ Intervention and error reporting</li><li>➤ Standards applied to nurses/carers regarding the administration of medicines (local and national policies)</li><li>➤ Ordering of medicines</li><li>➤ Receipt of medicines</li><li>➤ Storage of medicines</li></ul>	<u>General policies</u> <ul style="list-style-type: none"><li>➤ Admission &amp; discharge process*</li><li>➤ Dealing with violent or aggressive patients</li><li>➤ Lone working policy*</li><li>➤ Risk Management</li><li>➤ Residential care*</li><li>➤ Incident Management and Reporting Policy</li><li>➤ Emergency and Health and Safety procedures when working on a practice base</li><li>➤ Security issues relating to the use of patients' lockers*</li><li>➤ Medical notes/endorsement</li><li>➤ Access to information and support whilst on the practice base</li><li>➤ Barrier nursing</li><li>➤ Mental Capacity Act 2005 and Deprivation of Liberty Standards</li></ul>

*Please discuss any aspect of your SOPs that you are unclear about, with your ES.*

## Appendix B - Commonly used terms

### **Adherence**

The extent to which patients take medicines as agreed with a health care professional (usually involves the patient making an active decision to take the medicines as opposed to blindly following instructions).

### **Clinical Governance**

Is the system through which NHS organisations are accountable for continuously improving the quality of their services and safeguarding high standards of care, by creating an environment in which clinical excellence will flourish.

### **Competency**

The student's proven ability to carry out a specific task consistently to the required standard.

### **Compliance**

Defined as a patient taking the correct medication at the correct dose and time.

### **Compliance Devices**

Containers used by the patient at home to aid taking their medicine e.g. "Medidose" containers and community pharmacy dispensing systems.

### **Concordance**

Is an agreement reached after negotiation between the patient and health care professional determining when and how the medication is to be taken.

### **Counselling**

Advising a patient on how to gain optimum benefit from their medication.

### **Critical incident**

A detailed report of a medication optimisation episode. It can be an experience that went well or badly but should be something that the student has reflected on and learnt from.

### **Educational Supervisor (ES)**

A pharmacist or accredited lead medication optimisation pharmacy technician based at the place of work who observes and reports on medication optimisation sessions, gives feedback and general support and guidance to the candidate. The ES will confirm that the candidate's work has met the required standard.

### **Formative assessment**

On-going assessment that is used during the course to identify areas for improvement and development, e.g. portfolio. It does not count towards a final mark

**Medicines Policy**

A policy written to outline your practice base objectives and Standard Operating Procedures regarding Medicines Management.

**Objective Structured Clinical Examination (OSCE)**

An examination that is designed to test skills and knowledge. Students pass through a specified number of manned workstations where he/she must carry out a task. Manned stations use actors to play the part of patients or hospital staff, an observer will assess the student against set criteria. There is a time limit for each station.

**Patients' Own Drugs (POD Assessment)**

Those medicines brought into practice base by the patient.

**Practitioner**

An individual that is currently carrying out POD Assessment and Transcribing for Supply or Medicines Reconciliation and Transcribing for Supply.

**Standard Operating Procedures**

These are referred to as SOPs and state the way your organisation requires tasks to be carried out to ensure a quality pharmacy service is provided.

**Summative assessment**

Assessment that usually takes place at the end of a course, e.g. OSCE and determines whether a candidate has passed a course or programme.



## Appendix C – Forms

You will find a copy of the forms you need on the following pages – these are all available to download in the relevant section of Moodle:

<https://moodlelasepharmacy.hee.nhs.uk/course/index.php?categoryid=7>