

Medicines Optimisation Toolkit

Pharmacy London

NHSE Workforce, Training and Education Directorate

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Contents

| | |
|---|----|
| 1. Medicines Optimisation Toolkit | 2 |
| 1.1 Introduction | 2 |
| 1.2 Identifying knowledge and skills gap | 2 |
| 1.3 How to use the toolkit | 2 |
| 1.3.1 Process of supporting the pharmacy technician’s learning | 3 |
| 1.4 What is Medicines Optimisation? | 3 |
| 1.5 Medicines Reconciliation | 4 |
| 1.6 Confirm the suitability of an individual's medicines for use and ensure sufficient supply | 4 |
| 1.7 Order medicines and products for individuals | 4 |
| 1.8 Other Skills | 4 |
| 2. Courses and learning | 5 |
| 2.1 Medicines Reconciliation knowledge | 5 |
| 2.2 Communication skills, empathy, and a person-centred approach..... | 5 |
| 2.3 Consultation Skills | 6 |
| 2.4 Clinical Knowledge and Skills | 7 |
| 2.5 High Risk Medicines and Monitoring | 9 |
| 2.6 Professionalism, Professional Judgement and Professional Practice | 10 |
| Appendices | 12 |
| Appendix 1 Medicines Optimisation Toolkit Framework | 13 |
| Appendix 2 Learning Plan and Progress Reporting Form | 28 |
| Appendix 3 Observation Record..... | 30 |

1. Medicines Optimisation Toolkit

1.1 Introduction

In 2017, medicines optimisation was included within the initial education and training (IET) for pharmacy technicians. Pharmacy technicians qualifying after February 2022 will have undertaken training in medicines optimisation as part of their initial training. The Medicines Optimisation Programme (MOP) delivered by Health Education England – Pharmacy London accepted its last cohort for pharmacy technicians in December 2022. However, it is recognised that there is still a legacy pharmacy technician workforce that will not have completed this training.

The Medicines Optimisation Toolkit has been developed to support the skills and knowledge delivered in the workplace of this legacy workforce no longer able to access the MOP in London. It is intended as an enabling toolkit rather than an assessment framework and any activities should be agreed locally between the pharmacy technician and their educational supervisor or line manager. It is not a mandatory requirement to complete all or any of the signposted learning and is at the employers' discretion when a member of staff meets local standards to deliver a service and meet their job description.

1.2 Identifying knowledge and skills gap

Skills for Health have developed national occupational standards (NOS)¹ that show the skills and knowledge required to undertake a task at a national minimum level. These NOS were used to design the learning and assessment within the original MOP.

The framework in appendix 1, has been created to enable pharmacy technicians to self-assess and identify areas of development in their knowledge and skills against these NOS.

1.3 How to use the toolkit

Once areas for development have been identified, the pharmacy technician should meet and discuss these with their educational supervisor (ES) to create a learning plan. Templates have been provided in appendices 1-3 to document discussions with the ES, the learning plan, progress reviews and observations of practice. It is up to organisations if and how they use these documents.

Although this toolkit provides signposting to a range of courses and training, many gaps will be fulfilled from in-house training, shadowing and departmental/trust e-learning.

¹ <https://www.skillsforhealth.org.uk/info-hub/national-occupational-standards-overview/>

1.3.1 Process of supporting the pharmacy technician's learning



Signposted courses/training will not cover every NOS competency. In-house training, shadowing activities and on-the-job training can often offer the best learning experience.

1.4 What is Medicines Optimisation?

“Medicines optimisation is defined as a person-centred approach to safe and effective medicines use, to ensure people obtain the best possible outcomes from their medicines”.²

Further information on the definition of medicine optimisation can be found on the [NHS England](#) and [Royal Pharmaceutical Society](#) (RPS) websites.

² National Institute for Health and Care Excellence. (2015). Medicines optimisation: the safe and effective use of medicines to enable the best possible outcomes [NICE Guideline No. NG5]. <https://www.nice.org.uk/guidance/ng5>

1.5 Medicines Reconciliation

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.

1.6 Confirm the suitability of an individual's medicines for use and ensure sufficient supply

This involves checking that an individual's medicines are suitable for use and match what is currently prescribed for the individual, often referred to as the assessment of patient's own drugs (PODs).

It includes ensuring the individual has sufficient supply of medicines, the identification of any discrepancies and dealing with any problems appropriately.

1.7 Order medicines and products for individuals

This involves reviewing the individual's medication record and assessing the individual's current supply to identify the medicines required.

It may also cover transcribing (on paper or electronically) a medication order with instructions for labelling so that the medicines can be dispensed for the individual.

Practice of each of the above should be carried out under the regulatory, professional, and ethical frameworks established in the context of current legislation. A caring and compassionate approach should be adopted in line with current healthcare guidance.

1.8 Other Skills

A pharmacy technician is required to have effective communication skills, empathy, and a person-centred approach to ensure the most effective outcome from the discussion with the patient.

It is also important that the pharmacy technician has the necessary clinical knowledge.

2. Courses and learning

The following are resources to support identified development needs. This is not an exhaustive list. Signposted courses and learning are not compulsory but are useful to support learning and development discovered from feedback or situational reflection and support pharmacy technicians' personal development plans.

2.1 Medicines Reconciliation knowledge

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| The Centre for Pharmacy Postgraduate Education Create an account to access learning, resources, and workshops | <u>Gateway to Medicines reconciliation</u> a range of e-learning, resources, and tools. <u>Medicines Reconciliation</u> Define medicines reconciliation and describe the process. Summarise key points from NICE guidance on medicines reconciliation. Compare local medicines reconciliation policy against national recommendations. |
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2.2 Communication skills, empathy, and a person-centred approach

The following learning may be used to demonstrate competence against the NOS:
Pharm 29: K&U 15,16 18 and PC 2,3,6,8
Pharm 31: K&U 8,9 and PC 2,4,5
Pharm 33: K&U 19,20,21,22,23 and PC 1

| | |
|--|--|
| E-learning for Health (e-lfh) https://www.e-lfh.org.uk/ Create an account to access e-learning. | Person-centred approaches - introduces the behaviours, knowledge and skills for person-centred approaches, including the values, core communication and relationship building skills, engaging people and enabling and supporting people. Communicating with empathy Introduction to communication skills and how these are applied in end-of-life care. Covers: <ul style="list-style-type: none">• Making the most of listening• What do we mean by body language?• Responding to challenges in end-of-life care• Assessing and responding to communication needs• Practical application |
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|---|---|
| <p>Videos https://www.youtube.com/</p> | <ul style="list-style-type: none"> • <u>Empathy v sympathy</u> • <u>Just Listen - Paul Furey</u> • <u>4 things that Work Better than Questions – Paul Furey</u> • <u>Communication Skills: Empathetic Listening - Inside Out</u> • <u>Building Rapport - Consultations4Health</u> • <u>Empathy and communication with pts - Consultations4Health</u> • <u>Active Listening - Consultations4Health</u> |
|---|---|

2.3 Consultation Skills

The following learning may be used to demonstrate competence against the NOS:
 Pharm 29: K&U 15,16 18 and PC 2,3,6,8
 Pharm 31: K&U 8,9 and PC 2,4,5
 Pharm 33: K&U 19,20,21,22,23 and PC 1

| | |
|--|--|
| <p>The Centre for Pharmacy Postgraduate Education</p> | <p><u>Foundation Consultation Skills</u></p> <ul style="list-style-type: none"> • Apply key phrases to facilitate a person-centred approach to your consultation • Demonstrate appropriate skills and behaviours to ensure the best use of time in the consultation. • Explain the concept of clinical empathy and how it can be demonstrated. <p><u>Confidence in consultation skills (full day event)</u></p> <ul style="list-style-type: none"> • Outline your professional responsibility to reflect on and develop your consultation skills. • Analyse your consultation skills against a validated framework and identify your strengths and areas for development. • Apply key skills, models and techniques that support a person-centred approach. • Critique consultation skills and behaviours and provide feedback on areas of good practice and areas for development. • Demonstrate an increase in your confidence to deliver high-quality person-centred consultations. <p><u>Consulting with people with mental health problems</u></p> |
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| | <ul style="list-style-type: none"> • Describe the mental health treatment gap and the importance of parity of esteem (valuing mental health equally with physical health) • Recognise the impact of stigma and discrimination experienced by those with mental health problems. • Select the key national practice standards most applicable to pharmacy consultations with people with mental health problems. • Reflect on your consultations with people experiencing mental health problems. • Maximise the effectiveness of your consultations in this field by applying person-centred skills and behaviours. • Identify possible risks in your consultations with people with mental health problems. <p><u>Consultation skills for pharmacy practice: taking a patient-centred approach</u></p> <ul style="list-style-type: none"> • Explain the concept of patient-centred care • Describe the key communication and consultation skills and techniques required to conduct patient-centred care • Apply methods to assess your own practice and identify areas of improvement • Support patients, by using a patient-centred approach, to help them get the best from their medicines and/or in making healthy lifestyle choices • Further develop your practice by exploring tools and techniques, such as health coaching. |
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2.4 Clinical Knowledge and Skills

The following learning may be used to demonstrate competence against the NOS (dependent on clinical specialty):

Pharm 31: K&U 5,12,15,16

Pharm 29: K&U 5.9.11.12

Pharm 33: K&U 4,12

| | |
|---|--|
| The Centre for Pharmacy Postgraduate Education | <p>CPPE offers a range of distance, e-learning and workshops and other resources including:</p> <ul style="list-style-type: none"> • Cardiovascular Disease - Stroke • Inhaler Techniques • Pain Management <p>Search for information on these and other conditions using the A-Z search page</p> |
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| E-learning for Health (e-lfh) | <p>Search for information and e-learning courses on a range of conditions and topics on the e-lfh's <u>programmes page</u>, including:</p> <ul style="list-style-type: none"> • Asthma • Autism Awareness • Dementia • Parkinson's Disease • Pain Management • Safe use of Insulins |
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| Social Care Institute for Health | <p><u>Dementia e-learning course</u>. Learning outcomes include:</p> <ul style="list-style-type: none"> • Explain what is meant by the term 'dementia' • Discuss the signs and symptoms of dementia • Differentiate dementia from other similar conditions • Explain why early diagnosis is important • Discuss what people can do to reduce their risk of developing dementia • Explain what is involved in 'living well' • Discuss the importance of recognising what's important to people • Discuss how dementia affects the person, their family and our wider society • Understand how to communicate effectively and compassionately with individuals who have dementia • Understand why a person with dementia might show signs of distress • Begin to respond effectively to people with dementia who have different communication needs |
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| Dementia UK | <p><u>Let's talk about Dementia</u> video</p> <p><u>Advice leaflets</u> on a range of topics relating to dementia</p> |
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| <u>NHS website</u> | <p>The NHS website provides information on a range of different conditions including:</p> <p><u>Parkinson's Disease</u></p> <p><u>Hyper and hypotension</u></p> <p><u>Diabetes</u></p> <p>Search for information on these and other conditions using the <u>A-Z search page</u></p> |
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| Parkinson's UK | This website offers information and support relating to Parkinson's including: <u>Parkinson's Medication</u> |
| Asthma UK | The UK's lung charity Asthma UK provides an extensive range of 'How to Use' <u>Inhaler Videos</u> as well advise relating to <u>treatments for lung disease</u> |
| British Heart Foundation | The British Heart Foundation provides advice on: <u>Heart Disease</u> <u>Heart Conditions</u> |
| Anticoagulation UK | <u>Let's talk about anticoagulants video</u> <u>Warfarin</u> |

2.5 High Risk Medicines and Monitoring

The following learning may be used to demonstrate competence against the NOS (dependent on clinical specialty):

Pharm 31: K&U 5,12,15,16

Pharm 29: K&U 5.9.11.12

Pharm 33 K&U 4,12

| | |
|--|---|
| The Centre for Post-graduate Pharmacy Education Biochemistry Tests / Therapeutic monitoring | Biochemistry learning outcomes: <ul style="list-style-type: none"> • Explain the importance of laboratory testing in diagnostics and patient monitoring. • Demonstrate understanding of the theoretical basis of and varied approach to investigation and monitoring of interventions. • Advise on the appropriate treatment of patients with abnormal test results. • Recognise the drugs that require therapeutic drug monitoring. <u>Biochemistry section 1</u> - full blood count, inflammatory markers and coagulation. <u>Biochemistry section 2</u> - chronic disease markers, urea and electrolytes and liver function tests. <u>Biochemistry section 3</u> - thyroid function tests, bone function tests and therapeutic drug monitoring. <u>Biochemistry section 4</u> - monitoring requirements and targets associated with HbA1c and cholesterol results. |
| Specialist Pharmacy Service | <u>Drug Monitoring</u> – list of all drug monitoring requirements and tests |

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| | <p><u>Medicines to be prescribed in brand names</u> - List of medicines that should be prescribed in brand name</p> <p><u>Compliance Aid Compatibility Tool</u> - Find stability recommendations for tablets and capsules</p> |
| Choice and Medication website | <u>Information about medicines</u> - patient information and leaflets |
| Sodium Valproate | <p><u>MRHA – Discussing Valproate with female patients</u> – Information video from MRHA</p> <p><u>CNWL – Considering Valproate</u> – video of consultation with a female patient</p> |

2.6 Professionalism, Professional Judgement and Professional Practice

The following learning may be used to demonstrate competence against the NOS:
 Pharm 31 K&U 2,7
 Pharm 29 K&U 2,7
 Pharm 33 K&U 2,7

| | |
|---|---|
| <p>The Centre for Post-graduate Pharmacy Education</p> | <p>Professionalism and Professional Judgement</p> <ul style="list-style-type: none"> • Define professionalism and identify factors that influence behaviour, performance or attitude. • State the GPhC standards for pharmacy professionals and explain how they relate to your role. • Demonstrate application of professional judgement, recognising the limits of your capabilities and balancing the needs of the person. • Employ critical thinking skills to analyse information and make decisions, which you can justify. • Identify areas (of professionalism or professional decision making) for self- improvement. <p><u>Culturally competent person-centred care Gateway</u> Self- assessment e-learning for developing cultural competence</p> <p><u>Enhancing your professional practice</u></p> <ul style="list-style-type: none"> • identify resources to enable you to meet your personal learning needs |
|---|---|

- demonstrate how your knowledge, skills, experience and role have evolved since your initial training
- develop your reflective skills and apply these as part of your continuing professional development (CPD) and revalidation
- build evidence showing how your development has enabled you to meet updated learning outcomes from the GPhC 2017 *Standards for the initial education and training of pharmacy technicians*.

Time Management

- reflect on your own use of time and identify any problem areas which lead to inappropriate use of your time
- be aware of the different time management principles, tools and planning aids available and how to make use of them to improve your time management
- be more confident in delegating tasks to others
- manage situations which take up unnecessary time.

The Pharmacy Technician Gateway

- identify resources to enable you to meet your personal learning needs
- demonstrate how your knowledge, skills, experience and role have evolved since your initial training
- develop your reflective skills and apply these as part of your continuing professional development (CPD) and revalidation
- build evidence showing how your development has enabled you to meet updated learning outcomes from the GPhC 2017 *Standards for the initial education and training of pharmacy technicians*.

Appendices

Appendix 1 Medicines Optimisation Toolkit Framework

Appendix 2 Learning Plan and Progress Reporting Form

Appendix 3 Observation Record

Appendix 1 Medicines Optimisation Toolkit Framework

PHARM31.2022 Confirm the suitability of an individual's medicines for use and ensure sufficient supply.

Self-assess yourself against the Skills for Health National Occupational Standards (NOS) to ascertain your level of knowledge and skills. Consider how you will update missing skills so that you can meet the required competence and add this to your learning plan to discuss with your educational supervisor.

| | KNOWLEDGE AND UNDERSTANDING | Standard met (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----------|--|------------------------------|---|
| 1 | The Standard Operating Procedures and the importance of adhering to them at all times | | |
| 2 | 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 | | |
| 3 | Current health and safety legislation and how it applies to the working environment | | |
| 4 | Legal, organisational and policy requirements relevant to your role, the role of others in your organisation and the activities being carried out | | |
| 5 | The relevant national and local guidelines, policies and procedures that are available and how and when they should be accessed | | |
| 6 | The importance of adhering to information governance policies and maintaining confidentiality when sharing information about individuals with others | | |
| 7 | The duty to report any acts or omissions that could be detrimental to individuals, yourself, colleagues or your employer | | |

| | KNOWLEDGE AND UNDERSTANDING | Standard met (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----|---|------------------------------|---|
| 8 | Methods of enabling effective communication and supporting individuals to communicate their needs, views and preference | | |
| 9 | The importance of involving individuals in discussion and how this can be achieved | | |
| 10 | The purpose of confirming the suitability of an individual's own medicines against Standard Operating Procedures | | |
| 11 | The documentation required for recording information following assessment of medicines | | |
| 12 | The prescribing conventions, abbreviations and medical terminology | | |
| 13 | The different formulations of medicines | | |
| 14 | The factors which affect the security and storage of medication including expiry dates | | |
| 15 | Factors that may affect how medicines are taken | | |
| 16 | The psychological, occupational and social aspects and implications for individuals living with conditions | | |
| 17 | The labelling requirements for medicines | | |
| 18 | Legislation surrounding medicines not licensed in the UK within your scope of practice | | |

| | KNOWLEDGE AND UNDERSTANDING | Standard met (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|-----------|--|------------------------------|---|
| 19 | The use of compliance aids | | |
| 20 | The regulations related to the destruction of medicines | | |
| 21 | Legislation and organisational processes relating to obtaining valid consent | | |
| 22 | The actions to take if valid consent is not obtained | | |
| 23 | The importance of recording, storing and retrieving information in accordance with organisational procedures | | |

PHARM31.2022 Confirm the suitability of an individual's medicines for use and ensure sufficient supply

Self-assess yourself against the Skills for Health National Occupational Standards (NOS) to ascertain your level of knowledge and skills. Consider how you will update missing skills so that you can meet the required competence and add this to your learning plan to discuss with your educational supervisor.

| PERFORMANCE CRITERIA | | Criteria met. (Yes/No) | If no, how will this be achieved. If yes, how is this evidenced |
|----------------------|---|---------------------------|--|
| 1 | Work within the relevant Standard Operating Procedures including the relevant health and safety procedures and within your own limits of competence | | |
| 2 | 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 | | |
| 3 | Obtain valid consent from the individual or their carer for use, removal or destruction of the individual's own medicines if they are not appropriate for use | | |
| 4 | Explain the purpose of checking the individual's own medicines and answer any questions related to the process | | |
| 5 | Obtain appropriate information about the individual's medicines | | |
| 6 | Assess the individual's own medicines to ensure they are suitable for continued use, have an adequate supply and complete documentation as appropriate | | |
| 7 | Identify any discrepancies between the individual's own medicines and prescribed items | | |
| 8 | Record and report any discrepancies and other issues identified to an appropriate person | | |

| PERFORMANCE CRITERIA | | Criteria met. (Yes/No) | If no, how will this be achieved. If yes, how is this evidenced |
|----------------------|---|---------------------------|--|
| 9 | Arrange for medicines to be re-labelled or re-ordered where appropriate | | |
| 10 | Arrange for medicines not appropriate for use to be removed and/ or destroyed and recorded in accordance with Standard Operating Procedures | | |
| 11 | Arrange for any new medicines required to be ordered in accordance with Standard Operating Procedures | | |
| 12 | Complete all relevant documentation and store in accordance with legal and organisational requirements | | |

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

Self-assess yourself against the Skills for Health National Occupational Standards (NOS) to ascertain your level of knowledge and skills. Consider how you will update missing skills so that you can meet the required competence and add this to your learning plan to discuss with your educational supervisor.

| | KNOWLEDGE AND UNDERSTANDING | Standard met. (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----------|--|-----------------------------------|---|
| 1 | The Standard Operating Procedures and the importance of adhering to them at all times | | |
| 2 | 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 | | |
| 3 | Current health and safety legislation and how it applies to the working environment | | |
| 4 | Legal, organisational and policy requirements relevant to your role, the role of others in your organisation and the activities being carried out | | |
| 5 | The relevant national and local guidelines, policies and procedures that are available and how and when they should be accessed | | |
| 6 | The importance of adhering to information governance policies and maintaining confidentiality when sharing information about individuals with others | | |
| 7 | The duty to report any acts or omissions that could be detrimental to individuals, yourself, colleagues or your employer | | |
| 8 | How to confirm and record the individual's allergy status | | |

| | KNOWLEDGE AND UNDERSTANDING | Standard met. (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|-----------|--|-----------------------------------|---|
| 9 | The use of medicines including: <ol style="list-style-type: none"> 1. Dosing 2. Adverse effects 3. Common drug-drug interactions 4. Common drug-food interactions 5. Common drug-disease interactions 6. Cautions and contra-indications | | |
| 10 | The prescribing conventions, abbreviations and medical terminology | | |
| 11 | Factors that may affect how medicines are taken | | |
| 12 | The psychological, occupational and social aspects and implications for individuals living with conditions | | |
| 13 | Legislation and organisational processes relating to obtaining valid consent | | |
| 14 | The actions to take if valid consent is not obtained | | |
| 15 | Methods of enabling effective communication and supporting individuals to communicate their needs, views and preferences | | |
| 16 | How to create a suitable environment for an open and confidential discussion | | |
| 17 | The need to confirm your role and responsibilities and the individual's identification prior to retrieving a relevant medication history | | |

| | KNOWLEDGE AND UNDERSTANDING | Standard met. (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|-----------|---|-----------------------------------|---|
| 18 | When and how to retrieve the individual's identity and information from a third party where an individual is unable to participate themselves and/or where there are communication difficulties | | |
| 19 | What evidence you should seek to demonstrate a third party's ability and authority to provide information about an individual | | |
| 20 | The types of information that needs to be retrieved and why each is necessary | | |
| 21 | The steps you would take to try to clarify and confirm any information which is ambiguous or missing from an individual's or third party's narrative | | |
| 22 | How to use patient medication records or other sources of information to retrieve and confirm a medication history | | |
| 23 | Local and/or national error reporting procedures and communication channels | | |
| 24 | The importance of recording, storing and retrieving information in accordance with organisational procedures | | |

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

Self-assess yourself against the NOS to ascertain your level of knowledge and skills. Consider how you will update missing skills so that you can meet the required competence.

| PERFORMANCE CRITERIA | | Criteria met. (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----------------------|--|---------------------------|---|
| 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 | | |

| PERFORMANCE CRITERIA | | Criteria met. (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----------------------|--|---------------------------|---|
| 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"> 1. Medicines that have been started recently 2. Medicines that have stopped 3. Medicines that have changed 4. Medicines that are used regularly 5. Medicines that are used occasionally 6. Medicines that are swapped or shared between individuals or their family and friends 7. Medicines that are bought from other sources 8. If the individual drinks alcohol, smokes or uses other substances 9. If the individual has experienced any problems or difficulties with their medication | | |
| 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

Self-assess yourself against the Skills for Health National Occupational Standards (NOS) to ascertain your level of knowledge and skills. Consider how you will update missing skills so that you can meet the required competence and add this to your learning plan to discuss with your educational supervisor.

| | KNOWLEDGE AND UNDERSTANDING | Standard met (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|---|--|------------------------------|---|
| 1 | The Standard Operating Procedures and the importance of adhering to them at all times | | |
| 2 | 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 | | |
| 3 | Current health and safety legislation and how it applies to the working environment | | |
| 4 | Legal, organisational and policy requirements relevant to your role, the role of others in your organisation and the activities being carried out | | |
| 5 | The relevant national and local guidelines, policies and procedures that are available and how and when they should be accessed | | |
| 6 | The importance of adhering to information governance policies and maintaining confidentiality when sharing information about individuals with others | | |
| 7 | The duty to report any acts or omissions that could be detrimental to individuals, yourself, colleagues or your employer | | |
| 8 | The local procedure for ordering medicines for individuals | | |

| | KNOWLEDGE AND UNDERSTANDING | Standard met (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----|---|------------------------------|---|
| 9 | The local documentation required for placing an order | | |
| 10 | The different forms of medicines and why it is important to order appropriate quantities of the correct form and strength | | |
| 11 | The factors which affect the storage of medication including expiry dates | | |
| 12 | Issues that may affect how medicines are taken | | |
| 13 | The labelling requirements for medicines | | |
| 14 | Legislation surrounding medicines not licensed in the UK within your scope of practice | | |
| 15 | The use of compliance aids | | |
| 16 | The regulations related to the destruction of medicines | | |
| 17 | Legislation and organisational processes relating to obtaining valid consent | | |
| 18 | The actions to take if valid consent is not obtained | | |
| 19 | Methods of enabling effective communication and supporting individuals to communicate their needs, views and preferences | | |

| | KNOWLEDGE AND UNDERSTANDING | Standard met (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|-----------|--|------------------------------|---|
| 20 | The use of appropriate questioning techniques to obtain relevant information | | |
| 21 | The importance of establishing the requirements of individuals clearly and accurately | | |
| 22 | The importance of verbal and non-verbal communication when communicating with individuals | | |
| 23 | How to give clear and accurate information and check the individual's understanding | | |
| 24 | The source(s) of information that can be accessed and the information that can be given to individuals by you and other colleagues | | |
| 25 | The importance of recording, storing and retrieving information in accordance with organisational procedures | | |

PHARM33 Order medicines and products for individuals

Self-assess yourself against the Skills for Health National Occupational Standards (NOS) to ascertain your level of knowledge and skills. Consider how you will update missing skills so that you can meet the required competence and add this to your learning plan to discuss with your educational supervisor.

| PERFORMANCE CRITERIA | | Criteria met. (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----------------------|---|---------------------------|---|
| 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 | | |

| PERFORMANCE CRITERIA | | Criteria met. (Yes/No) | If no, how will this be achieved If yes, how is this evidenced |
|----------------------|--|---------------------------|---|
| 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 | | |

Appendix 2 Learning Plan and Progress Reporting Form

Pharmacy Technician's Name:

Educational Supervisor's Name:

Date of initial discussion with Educational Supervisor:

Discussion should cover:

- Learning identified by pharmacy technician
- Learning identified by educational supervisor
- How identified learning needs will be achieved
- Barriers or challenges to learning and how to mitigate
- Realistic timeframe for completion
- How and when progress will be reviewed
- How will the pharmacy technician be assessed or demonstrate competence?

Learning Plan

| Identified Learning | How will learning be achieved? | Deadline for completion | How will completion or competence be measured? |
|---------------------|--------------------------------|-------------------------|--|
| | | | |
| | | | |
| | | | |
| | | | |

Progress Reporting

| Review date | Comments and progress | Agreed Action | Deadline for completion |
|-------------|-----------------------|---------------|-------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

Appendix 3 Observation Record

Pharmacy Technician's Name:

Educational Supervisor's Name:

| PHARM31.2016 Confirm the suitability of an individual's medicines for use and ensure sufficient supply | | Date |
|--|--|------------------|
| Performance criteria | | Tick if observed |
| 1 | Work within the relevant Standard Operating Procedures including the relevant health and safety procedures and within your own limits of competence | |
| 2 | 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 need | |
| 3 | Obtain valid consent from the individual or their carer for use, removal, or destruction of the individual's own medicines if they are not appropriate for use | |
| 4 | Explain the purpose of checking the individual's own medicines and answer any questions related to the process | |
| 5 | Obtain appropriate information about the individual's medicines | |
| 6 | Assess the individual's own medicines to ensure they are fit for purpose, have an adequate supply and complete appropriate documentation as appropriate | |
| 7 | Refer any unidentifiable medicines or products to an appropriate person | |
| 8 | Identify any discrepancies between the individual's own medicines and prescribed items | |
| 9 | Record and report any discrepancies and other issues identified to an appropriate person | |
| 10 | Identify the individual's unlabelled medicines that are appropriate for use and label according to Standard Operating Procedures | |
| 11 | Arrange for medicines to be re-labelled where appropriate | |
| 12 | Arrange for medicines not appropriate for use to be removed and/ or destroyed and recorded in accordance with Standard Operating Procedures | |
| 13 | Arrange for any new medicines required to be issued in accordance with Standard Operating Procedures | |
| 14 | Complete all relevant documentation and store appropriately in accordance with legal and organisational requirements | |

Observation Record

Pharmacy Technician's Name:

Educational Supervisor's Name:

| PHARM29.2016 Retrieve and reconcile information about an individual's medicines | | Date |
|---|--|------------------|
| Performance criteria | | Tick if observed |
| 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"> 1. Medicines that have been started recently 2. Medicines that have stopped 3. Medicines that have changed 4. Medicines that are used regularly 5. Medicines that are used occasionally 6. Medicines that are swapped or shared between individuals or their family and friends 7. Medicines that are bought from other sources 8. If the individual drinks alcohol, smokes or uses other substances 9. If the individual has experienced any problems or difficulties with their medication | |
| 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 | |

Observation Record

Pharmacy Technician's Name:

Educational Supervisor's Name:

| PHARM33 Order medicines and products for individuals | | Date |
|--|---|------------------|
| Performance criteria | | Tick if observed |
| 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: <ol style="list-style-type: none"> 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 | |

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