NHS
Health Education England

London and South East Pharmacy

Medicines Optimisation Programme

Patient's Own Drugs (POD) Assessment and Transcribing for Supply

Course Handbook - August 2018

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Table of Contents

This handbook is valid August 2018 – July 2019 inclusive

Introduction to the Medicines Optimisation Programme – POD Assessment and Transcribing for Supply Course

The Medicines Optimisation Programme aims to compliment the development and enhancement of medicines optimisation skills to support pharmacy assistants, 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.

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

1 Patient's Own Drugs (POD) Assessment and Transcribing for Supply

Patients' own drugs (PODs) are the medicines that patients have obtained in the community setting and bring to hospital. The utilisation of PODs during a patients hospital stay has shown to have a beneficial effect not only on medicines wastage and drug expenditure but also facilitates the transfer of patients between healthcare settings.

Transcribing for Supply is the ordering of medicines/products for individual patients from a prescription that has been clinically screened by a registered pharmacist.

POD Assessment and Transcribing for Supply are systems of medicines reconciliation that contribute to the wider Medicines Optimisation agenda.

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

- PHARM31.2016 Confirm the suitability of an individual's medicines for use and ensure sufficient supply
- PHARM33.2016 Order medicines and products for individuals.

This course consists of two modules.

Module 1. Patient's Own Drugs (POD) Assessment

Module 2. Patient's Own Drugs (POD) Assessment and Transcribing for Supply

Which module 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 and work based evidence. 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 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

Patient's Own Drugs (POD) Assessment

- Confirm the suitability of an individual's medicines for use
- Identify discrepancies in medicines against prescribed 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

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.

1. Initial Meeting
2. Workplace Shadowing
3. In-house Training & 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. 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.

POD Assessment plus *optional* Transcription for Supply Module

1

Initial Meeting

- The Educational Supervisor (ES) and candidate will meet to agree who the candidate will work shadow and who will carry out the formative and summative assessments.

2

Workplace Shadowing

- The candidate will observe a minimum of **THREE** POD Asessments and **THREE** Transcribing for Supply (if registered for this optional module) being carried out in the workplace.

3

In-house Training & On-line Learning

- The candidate will complete in-house training and on-line activities on Moodle

4

On-line Summative Assessment

- The candidate will sit an on-line multiple choice assessment. This must be completed *BEFORE* starting the summative assessment logs.

5

Observation of Practice - Formative Assessment

- The candidate will be observed carrying out a minimum of **FIVE** POD Assessments (plus **FIVE** Transcriptions for Supply if registered for this optional module) .
- The witness will provide developmental feedback.

6

Formative Meeting

- The ES and candidate will meet to review feedback from the formative assessment (observations) and agree if the candidate is ready for summative assessment. If the candidate is not ready they can repeat the required observations of practice.

7

Evidence Collation - Summative Assessment

The candidate will be assessed against the NOS carrying out a minimum of **ONE HUNDRED** POD Assessments (plus **ONE HUNDRED** Transcribing for Supply if registered for this optional module). **No errors allowed.**

This evidence will be uploaded to Moodle for HEE LaSE to quality assure.

8

Sign-off Meeting & Evidence Submission

- The ES and candidate will meet to review evidence and sign-off candidate as competent.
- ***Once the sign-off has been completed by the ES the candidate may practice within the remit of their job description.***
- **This evidence will be uploaded to Moodle for HEE LaSE to quality assure.**

9

OSCE, HEE LaSE Quality Assurance (QA) & Certificate of Completion

- Evidence will be quality assured and upon successful completion a certificate issued.

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 successfully 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** POD Assessments

Module 2. a minimum of **THREE** POD Assessments 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 POD Assessments 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 & 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 - POD Assessments 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):

- PHARM31.2016 Confirm the suitability of an individual's medicines for use and ensure sufficient supply
- PHARM33.2016 Order medicines and products for individuals.

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

PHARM31.2016 Confirm the suitability of an individual's medicines for use and ensure sufficient supply

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

PHARM33 Order medicines and products for individuals

	KNOWLEDGE AND UNDERSTANDING	Mode of delivery
	The candidate will need to know and understand:	

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

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 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.

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 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. 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 POD Assessments or POD Assessments and Transcribing for Supply. Initially the candidate completes

Module 1. a minimum of **FIVE** POD Assessments or

Module 2. a minimum of **FIVE** POD Assessments 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. POD Assessment and Transcribing for Supply; when assessing a POD 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 PODs checked will exceed five to support five Transcribing for Supply. The candidate should continue recording the PODs 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 POD Assessments 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 observations 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 POD Assessments 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 POD Assessments and if undertaken some 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 **ONE HUNDRED** POD Assessments or

Module 2. a minimum of **ONE HUNDRED** POD Assessments and **ONE HUNDRED** Transcribing for Supply.

If the candidate is undertaking Module 2. POD Assessment and Transcribing for Supply; when assessing a POD 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 POD Assessments or POD Assessments 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 POD Assessment or Transcribing for Supply.

These NOS are:

- PHARM31.2016 Confirm the suitability of an individual's medicines for use and ensure sufficient supply
- PHARM33.2016 Order medicines and products for individuals as appropriate

PHARM31.2016 Confirm the suitability of an individual's medicines for use and ensure sufficient supply

PERFORMANCE CRITERIA	
You must be able to do the following:	
1	work within the relevant Standard Operating Procedures (SOPs) 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 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 SOPs
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 SOPs
13	arrange for any new medicines required to be issued in accordance with SOPs
14	complete all relevant documentation and store appropriately in accordance with legal and organisational requirements

PHARM33 Order medicines and products for individuals

PERFORMANCE CRITERIA	
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 one hundred POD Assessments 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 and 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 one hundred POD Assessments or one hundred Transcribing for Supply log from the beginning.

Candidates are allowed **TWO** attempts at passing the Summative Assessment for each module; POD Assessments 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 - POD Assessment	**Where to upload on Moodle**
• POD summative assessments, minimum of 100 items • Completed sign-off meeting form	Upload to stage **7** Upload to stage **8**
Module 2 - Transcribing for Supply	**Where to upload on Moodle**
• POD summative assessments, minimum of 100 items • Transcribing summative assessments, minimum of 100 items • Completed sign-off meeting form	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 HEE LaSE Quality Assurance & Certificate of Completion

Quality Assurance

On the first working week of each month a member of the HEE LaSE Pharmacy team will carry out a quality assurance check of all uploaded evidence of completion on a rolling basis. They will check that the correct documentation has been submitted and that there are **no** POD Assessment 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 one hundred POD Assessments 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 one hundred POD Assessments or one hundred Transcribing for Supply.

Candidates are allowed **TWO** attempts at passing the Summative Assessment for each element; POD Assessments 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 of the evidence submitted.

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

Pharmacy assistants and 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 - POD Assessment and Transcribing for Supply and ensure that they only ever work within this
- Inform their ES 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[1]
- 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 - POD Assessments and Transcribing for Supply programme module(s) they are preparing to undertake
- Attend all face to face 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
- Complete mandatory training as outlined

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:

[1] General Pharmaceutical Council. GPhC Standards for pharmacy professionals: https://www.pharmacyregulation.org/sites/default/files/standards_for_pharmacy_professionals_may_2017_0.pdf

- 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

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 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
- It is recommended that the ES witnesses some POD Assessments and Transcribing for supply

2.3 Role of the Witness

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

They should:

- Undertake formative and/or 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 - POD Assessments 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 - POD Assessments 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 - POD Assessments 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 is advertised on HEE LaSE Pharmacy website. There is no minimum amount of time to complete the course.

If a candidate is aware that they will not meet the 12-month deadline, they must discuss this with their Educational Supervisor and contact their Course Lead before the deadline. **It is not 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

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.

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	
Medicines SOPs ➢ Medicines Reconciliation Policy ➢ Medicines Policy ➢ Use of patients' own drugs (including consent) ➢ Intervention and error reporting ➢ Standards applied to nurses/carers regarding the administration of medicines (local and national policies) ➢ Ordering of medicines ➢ Receipt of medicines ➢ Storage of medicines	General policies ➢ Admission & discharge process* ➢ Dealing with violent or aggressive patients ➢ Lone working policy* ➢ Risk Management ➢ Residential care* ➢ Incident Management and Reporting Policy ➢ Emergency and Health and Safety procedures when working on a practice base ➢ Security issues relating to the use of patients' lockers* ➢ Medical notes/endorsement ➢ Access to information and support whilst on the practice base ➢ Barrier nursing ➢ Mental Capacity Act 2005 and Deprivation of Liberty Standards

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, 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.

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 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 from the relevant stage on Moodle: https://moodlelasepharmacy.hee.nhs.uk/course/index.php?categoryid=7