Introduction to the South West Dispensing Accuracy Assessment

South West Medicines Information & Training have designed this scheme in line with the standards set for the National Framework for pharmacy technicians undertaking the Final Accuracy Checking of dispensed items. This assessment is an entry requirement for the Final Accuracy Checking Pharmacy Technician Schemes, to provide evidence that individuals can dispense accurately before moving into a checking role.

Feedback from Dispensary Managers and those involved in the development of the South West Accuracy Checking Pharmacy Technician Scheme suggested that a formalised process to assess the dispensing accuracy of all staff would be useful.

All trusts within the South West Region recognise this scheme and it is now commonly used in the training and assessment of pharmacy assistants, pre-registration trainee pharmacists and pre-registration trainee pharmacy technicians, as well as for individuals embarking on the regional checking scheme.
The Aim of the Dispensing Accuracy Assessment

The overall aim of the dispensing accuracy assessment is to prevent and reduce the incidence of dispensing errors. The assessment enables all pharmacy staff to monitor their dispensing accuracy against a defined regional standard in order to:

- prove that staff can dispense accurately
- determine their error rate
- identify the types of errors made
- recognise any trends in errors made
- establish any further training needs
Who can complete the dispensing accuracy assessment?

The assessment is open to all pharmacy staff. How often the assessment tool is completed is down to the discretion of the Senior Pharmacy Manager and local policy and guidance.

The assessment tool can be used to demonstrate the ability to dispense accurately by:

**Pharmacy Assistants** as evidence towards the NVQ in Pharmacy Services Level 2

**Pre-registration Trainee**

**Pharmacy Technicians** as evidence towards their NVQ in Pharmacy Services Level 3

**Pharmacy Technicians** wishing to enter the South West Accuracy Checking Pharmacy Technician Scheme *compulsory* and as evidence of Continuing Professional Development

**Pre-registration Trainee**

**Pharmacists** as evidence for pre-registration competencies

**Pharmacists** as evidence of Continuing Professional Development

**Departments** to audit the dispensing service

**New Staff / Locums** after local training and induction to confirm they are familiar with local standards
**Why use the dispensing accuracy assessment?**

Every individual involved in dispensing is accountable for their work i.e. for every item you dispense you are responsible for ensuring that you have dispensed each item accurately. If the dispensary operates a system whereby another member of staff prepares the labels, then the person who dispenses the prescription must check the labels prior to submitting it for the final accuracy check and therefore is responsible for the accuracy of the labels too.

By performing the dispensing accuracy assessment, the standard to which an individual performs can be assessed.

If the standards set for the assessment are met, the individual has proven their ability to dispense accurately.

If the standards set for the assessment are not met, it should help to identify any particular training needs and to determine next steps.
What needs to be in place to complete the dispensing accuracy assessment?

Agreed local procedures

The Dispensary Manager must ensure that local policies and procedures regarding dispensing are in place and that they are clear and up to date.

Individuals must take personal responsibility for ensuring that they are up to date with local policies and procedures and are working according to them.

Training

All individuals must have completed an induction and local training prior to starting the assessment.

Support and guidance

The dispensing accuracy assessment is a standard that should be achieved by all individuals involved in dispensing; however, this assessment has been designed to positively support individuals to monitor their dispensing accuracy.

On completion of the assessment, candidates will require feedback and guidance from the Dispensary Manager on the outcome of their assessment and any next steps.

NB: For the purposes of this document the ‘Dispensary Manager’ is referred to as the individual with the responsibility of overseeing this assessment. In practice the Dispensary Manager may choose to delegate this responsibility to an appropriate, approved and designated other member of the pharmacy team.
How to complete the dispensing accuracy assessment

1. Initially candidates should agree an appropriate time to complete the assessment with their Dispensary Manager.
   NB: Dispensary Managers should ensure that the candidate has undertaken sufficient training prior to attempting the dispensing accuracy assessment. The assessment paperwork can be used as a training tool where appropriate. The dispensary manager and the candidate should agree the number and parameters of practice attempts and the word ‘practice’ should be written across the documentation to indicate that the paperwork is being used for training purposes.

2. Once ready to undertake the assessment, the dispensary manager and the candidate should identify which of the prescription types they should cover in the assessment, i.e. Outpatient, Inpatient or Discharge prescriptions

3. The dispensary manager may suggest a timeframe in which the candidate should complete the 200 items

4. The candidate should update their knowledge of procedures prior to commencing the assessment if necessary

5. The candidate should reflect on their current dispensing technique and consider the following points:
   - How accurate is their dispensing?
   - Do they make any errors?
   - Are there any ways in which the standard and accuracy of their dispensing can be improved?
   - Do they self-check their dispensing?

6. The candidate’s name and hospital should be completed on each blank diary log form (page 12)
7. Four copies of the blank diary log form should be provided (each form will log 50 items)
   NB: These sheets may be copied onto coloured paper or reminder cards used so that
   the final checker does not forget to sign the forms

8. The candidate should start to complete the diary log forms to record their dispensing
   (see page 11 for an example of how to complete)

9. To complete the assessment the candidate is required to dispense and record a
   minimum of 200 items

10. The candidate should record the 200 items continuously (including quieter and busier
    periods)

11. To successfully achieve the assessment the candidate should make **no errors**

12. On completion of the 200 items, the forms should be collated and the ‘Summary of
    Achievement Form’ completed (page 12)

13. A feedback session with the Dispensary Manager should be arranged

14. At the feedback session, the candidates should discuss their assessment and if there are
    any further steps necessary

15. If the candidate **has not** successfully achieved the standard set for the assessment, they should:
    • record details of the error made on the Error Analysis Record (page 14)
    • Reflect on why they think the error happened and the potential consequences of
      the error to the patient
    • decide if there is anything that can be done to improve their dispensing accuracy
      and avoid this error happening again
• document their reflection and discuss the error and next steps with the dispensary manager
• repeat the assessment as agreed with the dispensary manager

16. If the candidate has successfully achieved the standard set for the assessment, the dispensary manager can award a certificate of achievement (available to download from the SWMIT website). The certificate must be signed by the Dispensary Manager (or formally designated deputy).

17. If the candidate is applying for the South West Final Accuracy Checking Pharmacy Technician Checking Scheme then they must forward a copy of their certificate to the Pharmacy Training office with their application form for the course.

18. After 3 failed attempts, candidates will need to liaise with their dispensary manager and/or training lead to discuss and agree the appropriate course of action.
Completing the diary log forms

When collecting the 200 items the candidate will be required to record each item dispensed on the diary log forms (page 13). An example of a completed form is available on page 10.

Please note, the form has **two identical sections**; candidates can record a maximum 25 items on each side of the bold line.

The top entry shows that the candidate has recorded dispensing 5 items from an inpatient chart, no errors were detected by the checker.

The second entry shows that the candidate has recorded dispensing 2 items from an outpatient prescription, 1 error was detected by the checker. This candidate would fail the assessment.

It may be more convenient to use several diary log forms concurrently in order to maintain routine dispensing procedures.

<table>
<thead>
<tr>
<th>In practice as the candidate begins each dispensing period they will put the date on the form then, for each item they dispense they will:</th>
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</thead>
<tbody>
<tr>
<td>• record the type of prescription (using the appropriate code) for the number of items they have dispensed</td>
</tr>
<tr>
<td>• when satisfied that the dispensing is correct they should pass the prescription on for checking</td>
</tr>
<tr>
<td>• the checker will then need to confirm the accuracy of the dispensing by initialling the entry (each entry must be initialled individually)</td>
</tr>
<tr>
<td>• should the checker find an error they will need to inform the candidate and record the information, using the codes on the diary/log form</td>
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## South West Dispensing Accuracy Assessment

### SOUTH WEST DISPENSING ACCURACY ASSESSMENT DIARY / LOG FORM - EXAMPLE

Name: .......................................................... Hospital: ..................................................

<table>
<thead>
<tr>
<th>Date</th>
<th>Type of Prescription IP, OP, TTA, M/O (see codes)</th>
<th>Dispensing Error Found (see codes)</th>
<th>Dispensing Code</th>
<th>Final Checkers Signature</th>
<th>Date</th>
<th>Type of Prescription IP, OP, TTA, M/O (see codes)</th>
<th>Dispensing Error Found (see codes)</th>
<th>Dispensing Code</th>
<th>Final Checkers Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>28/12/01</td>
<td>Ip</td>
<td>AM</td>
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</tr>
</tbody>
</table>

### Prescription Codes

IP = Inpatient  
OP = Outpatient  
TTA = Discharge  
M/O = Miscellaneous/Other

### Error codes

1. Incorrect label
   a) drug name
   b) drug form
   c) drug strength
   d) quantity
   e) incorrect patient’s name
   f) directions
   g) additional warnings
   h) cost code
   i) ward
   j) date
   k) incorrect expiry date
   l) incorrect batch number
   m) incorrect spelling

2. Incorrect Contents
   a) drug
   b) drug form
   c) drug strength
   d) quantity

3. Other
   a) expired contents
   b) incorrect container/closure
   c) missing additional label
   d) missing signature
   e) unacceptable presentation
   f) missing patient information leaflet
   g) missing item

To successfully achieve the assessment you should make **no errors**
## South West Dispensing Accuracy Assessment

### Summary of Achievements Form

<table>
<thead>
<tr>
<th>Candidate Name</th>
<th>........................................................</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Date assessment started:</th>
<th>Date assessment finished:</th>
<th>No of working days to complete assessment:</th>
<th>Did you record your dispensing continuously?</th>
</tr>
</thead>
</table>

- **Total number of Outpatient items dispensed:**
- **Total number of Discharge items (TTA’s) dispensed:**
- **Total number of Inpatient items dispensed:**

**Summary of number of attempts and errors made during assessment:**

**Points discussed with Dispensary Manager:**
- 
- 
- 

**Outcome of the assessment:**

The candidate has */ has not * demonstrated their ability to dispense accurately

**Action Plan**
- 
- 
- 

**Next assessment due:**

**Candidate Comments on review of performance:**

**Dispensary Manager comments on review of performance:**

**Candidate signature:**

**Dispensary Manager Signature:**

**Date:**

**Date:**
# SOUTH WEST DISPENSING ACCURACY ASSESSMENT DIARY LOG FORM

<table>
<thead>
<tr>
<th>Date</th>
<th>Type of Prescription IP, OP, TTA, M/O (see codes)</th>
<th>Dispensing Error Found (see codes)</th>
<th>Final Checkers Signature</th>
<th>Date</th>
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</table>

**Error codes**

1. **Incorrect label**
   a) drug name  
   b) drug form  
   c) drug strength  
   d) quantity  
   e) incorrect patient’s name  
   f) directions  
   g) additional warnings  
   h) cost code  
   i) ward  
   j) date  
   k) incorrect expiry date  
   l) incorrect batch number  
   m) incorrect spelling  

2. **Incorrect Contents**
   a) drug  
   b) drug form  
   c) drug strength  
   d) quantity  

3. **Other**
   a) expired contents  
   b) incorrect container / closure  
   c) missing additional label  
   d) missing signature  
   e) unacceptable presentation  
   f) missing patient information leaflet  
   g) missing item

To successfully achieve the assessment you should make **no errors**
## Error Analysis record

To be completed for all errors made during the Dispensing Accuracy Assessment

<table>
<thead>
<tr>
<th>Candidate Name:</th>
<th>Dispensary Manager Name:</th>
<th>Date:</th>
</tr>
</thead>
</table>

**Error reference number (Item sheets - page and item number)**

**Brief description of error**

**Corrective actions taken**

**Potential impact of the error to the patient (candidate assessment)**

**Root cause of the dispensing error (candidate assessment)**
### Preventative Actions / Learning Objectives - What do I need to do to prevent the error happening again?

<table>
<thead>
<tr>
<th>Potential outcome (Dispensary Manager assessment)</th>
<th>None / Minor / Major / Critical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td></td>
</tr>
</tbody>
</table>

**Assessment of next steps / ability of the candidate to restart the assessment programme**

Candidate signature:........................................................................................................

Dispensary Manager signature:.........................................................................................
Acknowledgements

Kind thanks and appreciation are expressed to members of the original working group who helped to develop this assessment including:

Natasha King  Poole Hospital
Andrea McConkey  South West Pharmacy Education and Training
Garry McCrea  Gloucester Royal Hospital
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Alison Staples  Frenchay Hospital, Bristol.

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