

# UKMi Accredited Medicines Information Training Scheme For Pharmacy Technicians

## Manual



## Contents

<b>Acknowledgements</b>	<b>1</b>
<b>Welcome to the UKMi Accredited Medicines Information Training Scheme for Pharmacy Technicians</b>	<b>3</b>
<b>Glossary of terms</b>	<b>4</b>
<b>Organisational responsibilities of all staff groups involved</b>	<b>5</b>
<b>UKMi recommended model for Pharmacy Technicians processing enquiries</b>	<b>6</b>
<b>About the Training and Accreditation Scheme</b>	<b>9</b>
<b>Time-Scale for Completion</b>	<b>9</b>
<b>Financial Rewards</b>	<b>9</b>
<b>Entry to the Training Scheme</b>	<b>10</b>
<b>Entry Criteria</b>	<b>10</b>
<b>Application Form</b>	<b>11</b>
<b>The Accreditation Programme</b>	<b>14</b>
<b>Pre-course work</b>	<b>15</b>
<b>Ongoing Reviews with Mentor</b>	<b>16</b>
<b>Knowledge of policies and procedures</b>	<b>17</b>
<b>The Three-Day UKMi National Medicines Information Course</b>	<b>18</b>
<b>Skills Assessment</b>	<b>19</b>
<b>Competencies and Log sheets</b>	<b>20</b>
<b>Practice enquiries</b>	<b>21</b>
<b>Formal observed assessments</b>	<b>22</b>
<b>The UKMi Assessment Process</b>	<b>23</b>
<b>Probationary Period</b>	<b>24</b>
<b>Certificate of Achievement</b>	<b>24</b>
<b>Re-accreditation</b>	<b>25</b>
<b>Appeals procedure</b>	<b>26</b>
<b>Appendix 1 – Information for Mentors</b>	<b>27</b>
<b>Introduction</b>	<b>27</b>
<b>Role of the Mentor</b>	<b>27</b>
<b>Who can be a Mentor?</b>	<b>27</b>
<b>Duties of the mentor</b>	<b>27</b>
<b>Guidance on issues for local discussion</b>	<b>28</b>
<b>Appendix 2</b>	<b>29</b>
<b>Suggested preparation questions for technician prior to review</b>	<b>29</b>
<b>Suggested preparation questions for the mentor prior to review</b>	<b>30</b>

## **Acknowledgements**

The current Board of Management for the scheme is:

**Fiona Woods (Chair)**  
**Director Welsh Medicines Information Centre**  
**University Hospital of Wales**  
**Cardiff**

**Vivienne Rose (Scheme Director)**  
**Medicines Information Technician**  
**Northampton General Hospital**  
**Northampton**

The Scheme has been entirely dependent on the enthusiasm and hard work of those involved in its development since 1999. Colleagues involved include the current board of management and the following, who were involved in the early development work and were in these posts at that time. Our thanks go to all named here and every MI pharmacist and technician who has contributed thus far.

Andrea McConkey, Technician Development Officer, South West Medicines Information and Training  
Bristol Royal Infirmary

Gillian Lewis, Medicines Information Technician, South West Medicines Information and Training  
Bristol Royal Infirmary, Bristol

Trevor Beswick, Director South West Medicines Information and Training, Bristol Royal Infirmary, Bristol

Sarah Crotty, Senior Pharmacist - Medicines Information, Oxford Radcliffe NHS Trusts

Richard Cattell, South West Medicines Information and Training, Bristol Royal Infirmary (until 2007)

Paul Adams, Medicines Information Pharmacist, Gloucestershire Royal NHS Trust

Julia Horwood, London Medicines Information Service (Northwick Park), Harrow

Mike Welsby, Medicines Information Pharmacist, Whiston Hospital, St Helens and Knowsley NHS Trust

Beverley Allen, Medicines Information Technician, Doncaster Royal Infirmary

**The Board of Management (on behalf of UKMi) will**

- **accept nominations for the training course and facilitate places**
- **organise cohorts to meet demand**
- **organise timely assessment panels**
- **issue a certificate to successful technicians**
- **maintain a national register of Pharmacy Technicians accredited through the scheme including those who are re-accredited**
- **request submission of the required evidence for re-accreditation**
- **invoke the appeals system when requested**
- **provide advice and information to hospitals implementing the scheme.**

**If you require more information regarding the development of this scheme you can contact:**

Vivienne Rose, Scheme Director

[vivienne.rose@ngh.nhs.uk](mailto:vivienne.rose@ngh.nhs.uk)

## **Welcome to the UKMi Accredited Medicines Information Training Scheme for Pharmacy Technicians**

The UKMi document *Effective Information for Managing Medicines 2007* includes the Strategic Aim to develop an appropriate workforce strategy and underpin a competency pathway for MI technicians.

This scheme is aimed at Pharmacy Technicians who wish to become a UKMi accredited Medicines Information Technician and also experienced Pharmacists who would like to be a mentor.

The manual provides information on the organisational issues and responsibilities that must be clarified prior to commencing the scheme.

The manual also includes the recommended UKMi model for Pharmacy Technicians processing enquiries and offers guidelines on the types of enquiries that can be performed within this model.

The manual then describes the process that Pharmacy Technicians must follow to become accredited.

This edition of the manual has been designed and updated with the hindsight of eight cohorts and the experience of the Board of Management.

## **Glossary of terms**

**Trainee** This is the term used to refer to the Technician undergoing training in Medicines Information.

The trainee must be a registered Pharmacy Technician who meets the entry requirements outlined in this manual.

**Mentor** The mentor must be an experienced Medicines Information Pharmacist who has attended the UKMi National Training Course, and has good coaching skills.

The mentor should offer the trainee guidance and support throughout the training scheme.

The mentor should:

- ◆ facilitate the pre-course work
- ◆ identify relevant policies and procedures
- ◆ perform regular reviews of the trainee's progress
- ◆ identify the enquiry types that are relevant for the trainee
- ◆ consult on the trainee's skills assessment
- ◆ coach the trainee for their practice enquiries against the competencies.

## **Organisational responsibilities of all staff groups involved**

### **Regional Director**

- To confirm the information submitted on the application form
- To facilitate resolution of any concerns raised by the Board of Management or the local MI centre.

### **Senior Pharmacy Manager**

- To initiate local action to ensure that the Trust recognises that the task of processing enquiries by trained, accredited Pharmacy Technicians is an appropriate duty for clinical indemnity purposes.

### **Senior Medicines Information Pharmacist**

- To ensure all enquiries are answered to UKMi audit standard.
- To prepare local standard operating procedures to define the role and processes to be performed by the Medicines Information Technician.
- To ensure that the Medicines Information Technician has an up-to-date and relevant job description.
- To ensure robustness of the assessment process.

### **Medicines Information Technician**

- To read and understand all relevant standard operating procedures and to work according to these procedures.
- To consider if the role and responsibilities are appropriate for them prior to embarking on this accreditation.

## **UKMi recommended model for Pharmacy Technicians processing enquiries**

In order for Pharmacy Technicians to participate in the answering of enquiries there must be:

- a responsible supervising Pharmacist
- a system for the enquiry to be approved by a Pharmacist
- set procedures that define which of the following steps are appropriate

**(t = suggested role for technician)**

**(p = mandatory role for Pharmacist)**

It is the responsibility of the supervising Pharmacist to use their professional expertise when assigning enquiries. Enquiries should not be assigned that are beyond the Technician's expertise.

It is also the responsibility of the Medicines Information Technician not to attempt any enquiry that they believe is beyond their expertise.

<b>Enquiry types included in scheme</b>	<b>Enquiry types not included in scheme</b>
1. Identification of pharmaceuticals	1. Drugs in pregnancy
2. Availability of medicines	2. Drugs in breast milk
3. Formulation of medicines	3. Renal function
4. Stability of medicines (excluding parenteral administration )	4. Liver function
5. Interactions	5. Choice of treatment and dosing. This includes unlicensed medicines and unlicensed use of licensed medicines.
6. Adverse drug reactions	6. Medicines of abuse
7. Complementary medicine	7. Press/legal /non NHS or healthcare issues
8. Travel Medicine	
9. General Public	

### **1. Receive enquiry (t)**

The Medicines Information Technician may receive and document enquiries or refer the enquirer to a Pharmacist according to local standard operating procedures.

### **2. Assess enquiry, prioritise and assign (p/t)**

During the accreditation process the supervising Pharmacist must see all enquiries.

The technician answering enquiries undertakes all parts of the enquiry answering process, ensuring an appropriate pharmacist provides a check **at sometime** during the process.

If the technician is inexperienced in Medicines Information, the technician undertakes all parts of the enquiry answering process, ensuring an appropriate



pharmacist provides a check **early on** in this process.

In either case the supervising Pharmacist must also state if they wish to review the prepared answer before it is relayed to the enquirer.

***Until the technician is formally accredited, all enquiries must be checked by the supervising Pharmacist prior to the answer being relayed.***

Practice in centres that have accredited technicians has developed beyond this. The accredited technician undertakes all parts of the enquiry answering process, seeking support from an appropriate pharmacist, as they deem necessary. Additionally, there are examples of practice where the accredited technician answers many enquiry types (some accredited, some not) seeking support when required, as would any pharmacist in MI. This is subject to local arrangements with the MI Manager, Pharmacy Manager and Trust.

**3. Consider search (t)**

The Medicines Information Technician must consider where to search for the information according to local search strategies and standard operating procedures.

**4. Gather information (t)**

The relevant information should then be gathered.

**5. Analyse information (t)**

The information must be analysed and documented according to local standard operating procedures.

**6. Prepare answer (p/t)**

The answer should be prepared in a suitable format to respond to the enquirer.

**7. Check answer (p/t)**

The response prepared must be checked against the initial request by the Technician for accuracy. The supervising Pharmacist must perform a check

- ◆ whilst the Technician is undergoing training
- ◆ when a Pharmacist has requested
- ◆ if the Technician requires confirmation of the answer prior to the answer being relayed.

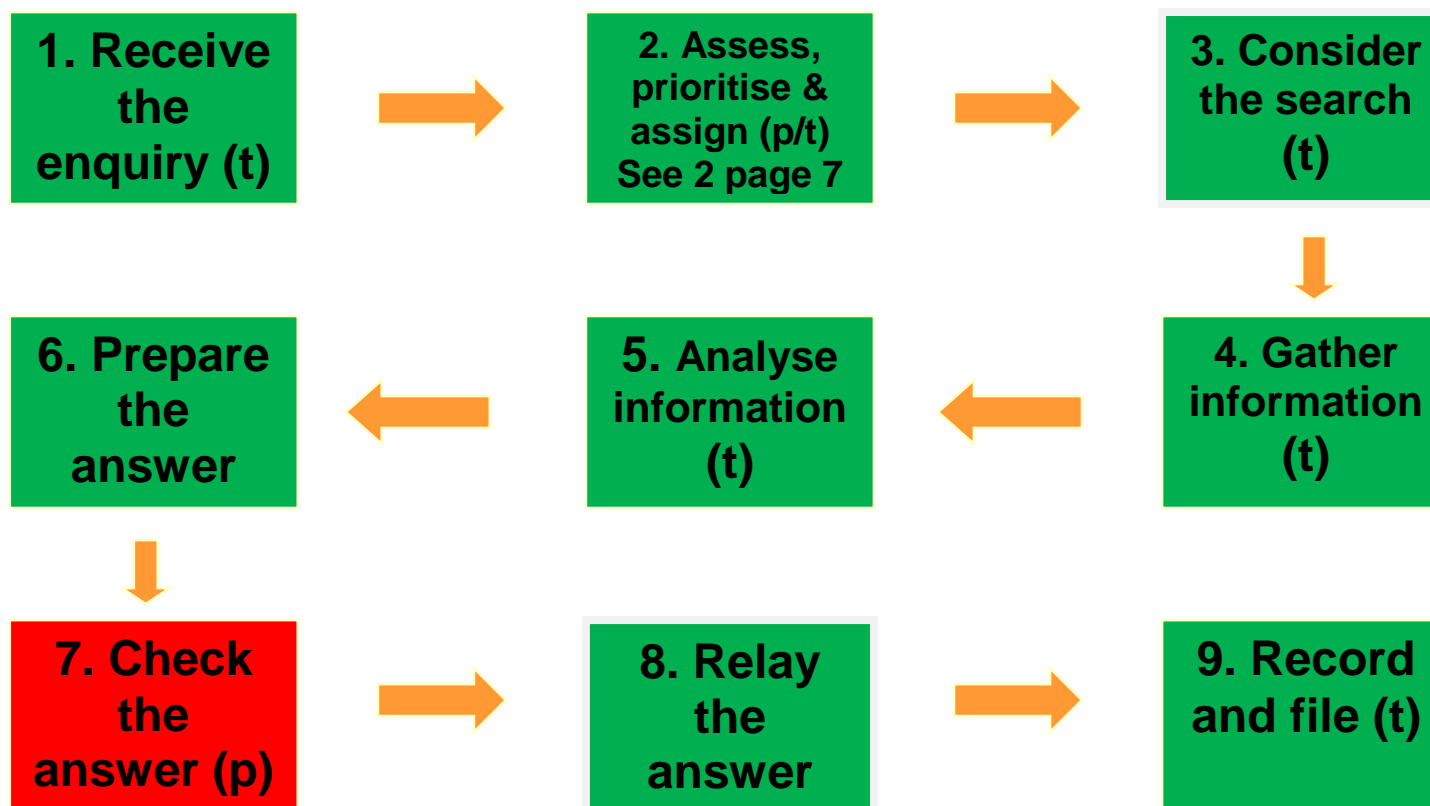
**8. Relay answer (p/t)**

When the answer has been prepared and checked, it must be forwarded. The Technician can perform this task if confident with dealing with any subsequent questions, if not the Pharmacist should relay the information.

**9. Record and file (t)**

When the enquiry has been completed and authorised, the enquiry must be closed and filed to archive, according to standard operating procedures.

## UKMi recommended model for Pharmacy Technicians processing enquiries



## **About the Training and Accreditation Scheme**

The manual now explains all of the stages involved in the accreditation scheme.

For the purpose of completing the accreditation the technician must participate where appropriate, in all roles that are suggested for support staff.

Whilst participating in the training scheme technicians must collect evidence of completing the following stages and must assemble a personal portfolio of evidence. For portfolio paperwork see separate Portfolio document.

### **Time-Scale for Completion**

All candidates must present themselves and their portfolio for assessment within the timescale set for the cohort.

Only significant extenuating circumstances to extend beyond the publicised close of course date will be considered by the Board of Management.

Additional categories may be submitted by arrangement with the Scheme Director, according to the process detailed later in the manual.

### **Financial Rewards**

UKMi recommend that any financial rewards are dealt with locally by Senior Pharmacy Managers.

## **Entry to the Training Scheme**

If you would like to enrol for the Medicines Information accreditation you must:

- meet the entry criteria

and

- complete the application form **and** the National MI course nomination form

## **Entry Criteria**

The training programme is available only to Pharmacy Technicians with a qualification that meets the requirements of the GPhC for registration.

**and**

- Registered with the GPhC

**and**

- two year post qualification hospital pharmacy experience that is considered to be appropriate and relevant

**and**

- confirmation from the local Senior Pharmacy Manager and Medicines Information Manager that the technician is a suitable person

**and**

- a regular role in Medicines Information and be permanently based in Medicines Information (but not necessarily full time). If working less than two and a half days a week in Medicines Information, it may be difficult to obtain sufficient evidence for accreditation within the timescale.

**and**

- a mentor who is an appropriately experienced specialist Medicines Information Pharmacist (see Appendix 1).

Entry requirements are designed to allow local selection of technicians with appropriate experience and suitability for the role.

**Application Form**  
**UKMi Accredited Medicines Information Training Scheme for Pharmacy Technicians**

**Applicant details**

Name

Job Title

Full Name and Address of Hospital

E-mail Address

Work telephone number

Telephone number (in case of emergency)

Professional Qualification (**Please attach copy of certificate**)

Length of Medicines Information experience

Copy of Job Description

GPhC Registration Number

(Absence of any one of these will void the application)

Briefly describe your experience in Medicines Information (continue on a separate sheet if necessary):

I would like to aim to complete the accreditation for the following enquiry types (**please tick**):

**Minimum of 4**

Identification of Pharmaceuticals	
Availability of medicines	
Pharmaceutical - Stability	
Pharmaceutical - Formulation	
Interactions	
Adverse Drug Reactions	
Complementary medicine - Herbal	
Travel medicine – with vaccines	
Member of Public	

**I understand that once accepted onto the course the full course fee will be charged.**

Signed

Date

**Mentor details**

Name

E-mail address

Work telephone number

Job Title

I am a Medicines Information Pharmacist with \_\_\_\_\_ years experience and have attended the UKMi National MI Training Course in (year .....). I have good coaching skills and I am willing to mentor the technician named above.

I will attend the induction and support day.

Signed

Date

**Approval from Medicines Information Manager (please tick)**

- The department subscribes to the principles of the UKMi QA standards
- I enclose a copy of a QA audit completed within the last 3 years and action plan (if appropriate)
- I will ensure that standard operating procedures are in place prior to assessing the technician
- I have clearly defined the lines of accountability
- I will ensure that the technician's job description reflects their role
- I take responsibility to ensure that the technician will work with adequate supervision to meet the recommendations in the scheme manual and they will continue to have adequate support of a Pharmacist when accredited.
- Once accepted onto the course full payment will be made, and will still be due in the event of the technician subsequently withdrawing from the scheme.

Signed

Name

Date

**Approval from Senior Pharmacy Manager**

I have informed the trust board of the Pharmacy Technician's role in Medicines Information to ensure that the Pharmacy Technician is covered by clinical indemnity.  
(Scheme manual available:

I confirm that this candidate has a regular, operational role in Medicines Information.  
I recommend this technician for the UKMi Accredited Medicines Information Training Scheme for Pharmacy Technicians

and

I approve this Medicines Information Pharmacist as an appropriate mentor.

Name:

Signed:

Date:

*Please forward form to the Regional Director of Medicines Information for approval.*

**Approval from Regional Director of Medicines Information**

I support this application for the UKMi Accredited Medicines Information Training Scheme for Pharmacy Technicians.

Name:

Signed:

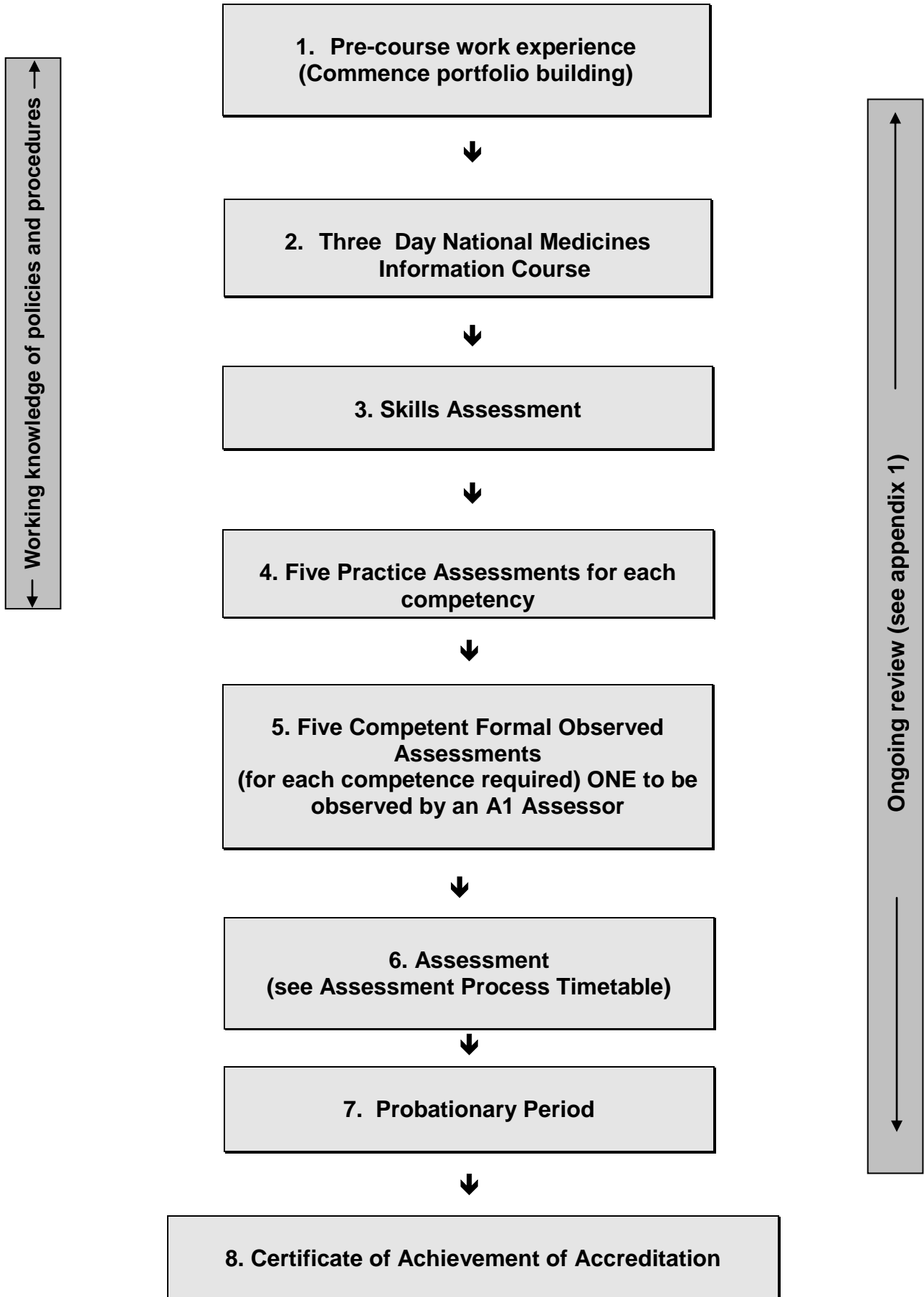
Date:

*On completion of the application form please return it to:*

*Vivienne Rose, Scheme Director AMITTS, Medicines Information, Pharmacy, Northampton General Hospital NHS Trust, Cliftonville, Northampton NN1 5BD*

*Payment of course fees will be requested with confirmation of place, and will still be due in the event of the technician subsequently withdrawing from the scheme.*

## The Accreditation Programme





## **Pre-course work**

In order to ensure that all technicians have the same background information, there is a range of tasks that all technicians must complete prior to attending the residential national introductory course.

Technicians must refer to the UKMi website, MiCAL and UKMi Training Workbook where relevant.

## **Tasks**

- 1 Prepare a diagram to illustrate the lines of responsibility (structure) within your Medicines Information department, including who to consult in the absence of the MI Pharmacist.
- 2 Read Chapter B What is Medicines Information, UKMi Workbook.
  - Prepare a diagram to illustrate how your department networks with other Medicines Information departments e.g. locally, regionally and nationally.
  - Know the scope of the service your MI centre provides, including contractual arrangements for the enquiry answering service.
  - Find out if your department provides any specialist information and advisory services and where specialist information services are located nationally.
- 3 Read Chapter D Sources of Information, UKMi Workbook. Make a list of the key sources of information that are available in your centre and the types of information they contain.
- 4 Make a list of the significant legal and ethical issues that you need to consider when working in Medicines Information (Read the relevant sections of MiCAL and the UKMi workbook) Write brief notes on how the legal and ethical issues will impact on your working practices.
- 5 Complete the relevant chapters of the UKMi workbook for enquiry types accreditation is being applied for
- 6 Visit to Regional MI Centre – (prior to assessment will be acceptable if it is not possible to visit before the residential course)

**Evidence of completing these tasks, countersigned by your mentor must be submitted prior to or at the residential course.**

## **Ongoing Reviews with Mentor**

(see Appendix 2 for further information)

During the training period there will be ongoing / regular reviews. These are vital:

- to ensure that there is regular communication between the technician and the mentor

and

- to create an opportunity to reflect on the progress of the technician.

For the Medicines Information scheme, technicians **must** be appraised by their named mentor on at **least five** occasions that are evenly spaced throughout the training.

Suggested times for reviews will be:

- on completion of the pre-course work, prior to attending National Medicines Information Course
- skills assessment after National Medicines Information Course
- during practice enquiries
- on completion of practice enquiries, prior to commencing formal observed assessments
- on completion of the portfolio, in preparation for the assessment interview

All reviews must be documented (see Portfolio, Form 8), as they will provide information for the interview assessment and an ongoing record of the technician's progress. A copy of each completed review form must be kept in the technician's personal portfolio of evidence.

**The completed review form for the first review (prior to attending National Medicines Information Course) must be brought to the course.**

To aid the review process, a list of points to consider in preparation for the review has been included in Appendix 2.

## **Knowledge of policies and procedures**

It is essential that policies and procedures are prepared, to ensure that the Medicines Information Technician and other staff groups involved have clear guidelines regarding:

- role and duties to be performed
- local boundaries
- local practice requirements.

It is important that there is evidence of understanding of the relevant policies and procedures by the technician.

Initially the mentor should identify all the latest procedures relevant to the technician (see Portfolio, Form 2).

They should then complete a comprehensive list to inform the technician which procedures they need to be aware of.

The technician should then:

1. Collect and read all relevant procedures, and include them in their personal portfolio of evidence.  
(The purpose of this is so that they have the procedures for future reference.)
2. Demonstrate to the mentor their understanding of all relevant procedures prior to commencing any of the activities involved in the training scheme.

For each procedure listed the mentor should ask a minimum of three questions.

If the questions are answered satisfactorily, and the mentor is satisfied that the Technician has a clear understanding of the relevant procedures, then the log should be completed and entered in the technician's portfolio.

**This stage of the scheme, which involves developing a working knowledge of policies and procedures, must be covered prior to beginning the formal observed assessments.**

## **The Three-Day UKMi National Medicines Information Course**

After completing the pre-course work experience, technicians must attend and complete the three day residential UKMi National Medicines Information Course.

A series of tutorials are provided which cover the theoretical aspects of Medicines Information for the technician.

Topics included in the course programme are:

- Structure and role of Medicines Information locally, regionally and nationally.
- Clinical Governance
- Legal and ethical aspects, to include
  - Framework for Pharmacy Technicians in Medicines Information
  - Negligence/liability
  - Confidentiality
  - Responsibility and accountability
- Types of information. To include sources available and search strategies.
- Critical Appraisal
- Medline and Embase
- Application of information to enquiries.
- About the training scheme, requirements and purpose of each stage.
- The training scheme documentation.

The actual programme will be available via the UKMi website. A certificate of attendance must be entered in the technician's portfolio of evidence.

## **Skills Assessment**

Technicians completing the accreditation are likely to have different training needs, depending on experience.

After completing the residential course, technicians must reflect on their current skills and knowledge.

In order to do this a list of core skills required to perform as an effective Medicines Information Technician has been compiled see Portfolio, Form 4. A list of optional skills is included and should be assessed depending on local need/practice.

The Technician must perform a self-assessment of their current skills.

They must then discuss the self-assessment with their mentor to gain their views of the technician's ability.

There will inevitably be some tasks where the technician may perceive their performance is a little weaker and the mentor may be able to reassure the technician and vice versa.

On completion of this exercise the technician and mentor will have identified the technician's training needs.

Training tasks should be prepared locally to develop these skills.

Evidence of the skills assessment and training tasks performed, over a period of time, must be entered in the technician's portfolio of evidence, and a reviewed skills assessment form submitted in the portfolio.

## **Competencies and Log sheets**

There are two sets of competencies that technicians must complete at both the practice and assessment stages. They can be found in the portfolio (p8-16).

### 1. General competencies

These apply to ALL enquiry types. They must be completed on a minimum of 5 occasions each at the practice and assessment stages.

Documentation of meeting the standards is required on five occasions but ALL enquiries must meet the standards.

### 2. Specific competencies

These apply to one enquiry type only and so vary between enquiry types. They must be completed on a minimum of 5 occasions each for all enquiry types the technician wishes to become accredited in, at the practice and assessment stages.

For both the above sets of competencies and at both the practice and assessment stages, this may mean that 5 enquiries will be sufficient. But it may also mean that if certain competencies are not covered or are not performed to the required standard then additional enquiries must be included.

The competency log sheets must be completed in full. The following nomenclature should be used when measuring performance against the competency:

- ✓ A tick must be placed in the column where the technician performs the competency appropriately.
  
- ✘ A cross must be placed in the column if the technician does not perform the competency appropriately or the competency was not relevant for the specific enquiry.

## **Practice enquiries**

On completion of the tasks identified from the skills assessment, technicians must complete the competencies as outlined above. This is to ensure that all technicians gain the same level of experience and practice prior to commencing the formal observed assessments.

### **Documenting the practice enquiries**

The technician should process the enquiry. The mentor may coach and supervise the technician. The technician's performance should be compared to the competency log sheets for the relevant enquiry type. This is to ensure that the technician is coached to the standard set by the scheme and to ensure that they are familiar with them prior to their formal assessments.

For the practice enquiries up to 4 of the 5 competencies can be from enquiries previously answered, to enable technicians with considerable experience to have some credit for their prior learning. Technicians with 2 years experience only may submit enquiries completed prior to the scheme. These enquiries should have been completed no longer than 12 months prior to the start of the course.

The enquiry sheet should be given a portfolio reference number and this number should be entered on the competency log sheets. The log sheets should be completed as above. The technician must include a copy of the anonymised enquiry sheet in their portfolio. This is so that when the portfolios are reviewed the assessor can examine the enquiries handled and the competencies covered.

On completion of **each** practice enquiry constructive feedback must given at the time to the technician and documented. This will enable any amendments to practice to be implemented before the next enquiry is undertaken. Feedback must be documented on the feedback form (Form 6).

## **Formal observed assessments**

On completion of the practice enquiries the technician must complete the formal observed assessments. The technician **must** successfully complete the competencies as outlined on p21, to demonstrate consistent competence. This stage is to formally assess that technicians can process the enquiries competently and should be seen as an exam that is held in the workplace. The purpose of this stage is to assess the technician's knowledge and skills to handle enquiries independently. The mentor / assessor should be supportive during the assessment but must not coach the technician.

### **Preparing for the formal observed assessment**

- The technician and the mentor assessor must discuss and agree when the technician is ready to begin assessments.
- For each enquiry type a checklist of relevant competencies has been prepared.
- The technician must be familiar with the competencies that they will be assessed against, so that they are aware of the standards for competence.
- There is no set order in which the enquiry types must be covered and technicians can collect evidence for more than one enquiry type at a time.
- Previously answered enquiries cannot be included as part of the formal assessment.

### **Conducting the assessments within the Local MI centre**

The assessments will be performed by observing the technician processing the enquiry according to local standard operating procedures, and by using the guidelines outlined in this manual. The assessor must assess the technician objectively against the competencies. The competency logs should be completed as for the practice enquiries and according to the guidance on p 21.

The mentor should ask some questions during the assessment to check the technician's underpinning knowledge i.e. that they understand the reasons behind what they are doing.

If a technician **does** competently perform the applicable competencies, and answers the enquiry correctly then the assessment is deemed a **pass** and **can** be counted as one of the five formal observed assessments.

If the technician **does not** competently perform the applicable competencies and/or answers the enquiry incorrectly then the assessment **cannot** be counted as one of the five formal observed assessments.

On completion of the assessment, feedback and a decision must be **immediately** given to the technician as to whether the assessment has been completed successfully or not. All feedback given to the technician must be documented on a feedback sheet, at the time.



## **The UKMi Assessment Process**

1. The mentor writes to the Scheme Director (copying in the Regional Director of Medicines Information) indicating that the portfolio and summary of achievements form are complete
2. The technician forwards their portfolio to their allocated assessor by the portfolio submission date.
3. The portfolio assessor checks and assesses the portfolio against the standard marking scheme prior to the assessment interview. The assessor will bring the portfolio and feedback to the interview. The technician may be asked to bring further evidence to the interview.
4. The technician attends assessment interview (the panel consists of one of the Board of Management and one Regional Director of Medicines Information)
  - a. The portfolio assessor informs the technician whether their portfolio has passed or further work is required to achieve a pass. Any further work required will include a deadline.
  - b. The technician is contacted within 3 working days with the outcome of the interview
5. Any further work required is submitted and assessed
6. Successful technicians undertake a four-week probationary period.
7. The mentor then contacts the Board of Management, by sending a letter to the Scheme Director when the probationary period has been completed and has been successful.
8. UKMi then enters the technician onto the register of accredited Medicines Information Technicians for a period of 2 years and a certificate of completion will be issued to the Technician.
9. Additional enquiry types may be added later as practice develops. The technician must submit the relevant sections of the portfolio for assessment.

For further information please contact the Scheme Director. The accreditation for any additional categories will expire at the same time as the initial accreditation i.e. 2 years from date of issue of the first certificate.

## **Probationary Period**

The probationary period is the final component of the training and accreditation scheme and lasts for four weeks.

When the mentor signs the technician off to go forward for assessment, this decision should include whether the technician is competent to work independently.

The probationary period is a support mechanism for the technician and involves reducing the level of supervision.

At the beginning of the probationary period the technician's work is checked before information is relayed to the enquirer. Over the course of the probationary period the level of supervision should decline. Guidelines regarding the decline in supervision should be prepared locally.

It is useful if the mentor and technician set aside some time each week and record outcomes of the discussions on the review forms.

This stage is intended to be a support mechanism for the technician to gain confidence in relaying appropriate enquiry information that does not require a Pharmacist check.

This will be subject to some discretion as there will be occasions where the Pharmacist has requested a second check or the accredited Technician may need to refer an enquiry or seek confirmation.

The probationary period is a time for the technician to gain confidence and should not normally be extended beyond one month. It must be completed as soon as possible after confirmation has been received that the technician's portfolio has passed assessment and the technician has been successful at assessment interview.

The mentor then contacts the Board of Management, by sending a letter to the Course Director when the probationary period has been completed and has been successful.

## **Certificate of Achievement**

The named mentor should contact the Scheme Director on satisfactory completion of all stages. The technician will be recorded in the national register of accredited Medicines Information Technicians, and issued with a certificate of achievement.

## **Reaccreditation**

The accreditation will be valid for two years from the date of issue of the certificate. At the end of these two years the accredited Technician will be required to provide the following for assessment by the Board of Management. Subsequent reaccreditation will be every three years.

- evidence of remaining actively involved in enquiry answering and engaged as a Medicines Information Technician. Assessment of quality of enquiries answered by the technician will also be undertaken. Full details will be supplied when the Board of Management requests documentation for re-accreditation.
- a statement signed by the Medicines Information Manager and Senior Pharmacy Manager that the Technician remains currently engaged in Medicines Information activities and continues to have their confidence

The Board of Management will request documentation for re-accreditation at least one month before the accreditation expires.

If such evidence is not presented, the Technician's name will be removed from the active register of accredited Technicians held by UKMi and the Technician will need to complete further training and assessment should they wish to be re-accredited.

The Senior Medicines Information Pharmacist and Accredited Medicines Information Technician are both responsible for ensuring that the Technician is maintained on the national register of Accredited Medicines Information Technicians.

The inclusion of a re-accreditation requirement is designed to ensure that Technicians on the register of accredited Technicians remain active in the area and have evidence of continued competence in this role.

## **Appeals procedure**

We wish to ensure that all technicians are treated fairly, equally and with respect in relation to their assessment (this includes accreditation and reaccreditation)

Should any technician be dissatisfied with the conduct or adequacy of an assessment they must within 5 working days of their assessment or 5 working days of the receipt of their decision contact the Board of Management and give notice of their dissatisfaction and of their intention to forward an appeal.

The formal appeal procedure must then be followed:

1. All appeals against the conduct, adequacy or outcome of any assessment by the Board of Management must be forwarded in writing to the Board of Management within 10 working days of the technician having given notice of their intention.
2. On receipt of notification of an appeal the Board of Management will:
  - set a date for the appeal to be heard by the appeals panel
  - decide how and by whom the appeal will be heard
  - inform the technician and mentor by letter of the date of the appeal
3. The appeal panel will meet within 20 working days of receipt of the written notification of the appeal
4. The appeal panel will consist of:
  - A representative of the Board of Management (not otherwise involved in the assessment)
  - A Regional Director of Medicines Information (not otherwise involved in the assessment)
  - A Senior Medicines Information Pharmacist (not otherwise involved in the assessment)

The technician will be offered the opportunity to be accompanied by their mentor or a pharmacist of their choice to help them present their evidence.
5. The appeals panel will reach a decision and all involved parties will receive written notification within 10 working days.
6. The Board of Management reserves the right to decide on the location for the appeal.
7. The cost of travel for the technician will be the responsibility of their hospital trust.

## **Appendix 1**

### **Information for Mentors**

#### **Introduction**

This information is for the mentors of Technicians undertaking the above scheme, to be used in conjunction with the scheme manual.

#### **Role of the Mentor**

The mentor's role is to facilitate the local implementation of the scheme and to provide support, guidance and feedback.

#### **Who can be a Mentor?**

The mentor must be an experienced Medicines Information Pharmacist based within the technician's Trust with a minimum of two years experience as a Medicines Information Pharmacist. It is recommended that the mentor is someone who has the opportunity to meet regularly with the technician to discuss progress and give feedback

They should have attended the UKMi National Training Course and must be approved by the Senior Pharmacy Manager.

#### **Duties of the mentor**

- Planning the implementation of the Medicines Information accreditation practice in the department.
- Confirming that technicians have a clear understanding of all relevant policies and procedures
- Supporting the technician to complete the pre-course activities and tasks, and providing any additional support to address the change in the working environment
- Ensuring that the technician is positive about working in an office environment prior to completing the residential induction
- Providing constructive feedback to the technician regarding their skills assessment
- Assessing the technician objectively against the standards set in the scheme and giving constructive feedback at the time
- Documenting the progress of the technician by performing regular reviews, this information will be reviewed by the assessment panel

- Preparing technicians for the assessment interview
- Liaising with the Board of Management
- Assisting the Technician with assembling their personal portfolio of evidence
- Encouraging the technician to network with other technicians and accredited Medicines Information Technicians
- Ensuring the technician is competent before recommending them to go forward for assessment.

### **Guidance on issues for local discussion**

It will be necessary to:

- Establish clear departmental standard operating procedures and guidelines on the roles and responsibilities of a Medicines Information Technician prior to them embarking on these roles.
- Ensure that all staff whose work may be affected by the implementation of the scheme are fully informed of the process
- Identify the enquiry types appropriate for the Technician to cover locally
- Design tasks to develop the technician's skills
- Implement a local system that clearly indicates if the supervising Pharmacist has screened the enquiry and if the Pharmacist needs to review the information prior to the answer being relayed.

## **Appendix 2**

### **Suggested preparation questions for technician prior to review**

*Here are some points you may wish to consider before your review in preparation for discussion with your mentor*

- What are you doing well as a Medicines Information Technician?
- What do you find particularly challenging about being a Medicines Information Technician?
- Are there any factors that have a positive effect on your performance?
- Are there any factors that have a negative effect on your performance?
- What are your strengths as a Medicines Information Technician?
- What are your weaknesses as a Medicines Information Technician?
- Have you made any errors? (In this review period)  
If yes what were they?  
What do you think caused you to make this error?  
How would you prevent this happening again?
- Have you had any difficulties whilst progressing through the scheme?  
If yes, what are they?  
Is there any action we / UKMi can take?
- How do you find the portfolio paperwork? Is it easy to understand and manageable to complete?
- Do you feel you are receiving sufficient support?
- Are there any other comments that you feel may be relevant?

## Suggested preparation questions for the mentor prior to review

*Points to be considered by the mentor before reviews in preparation for discussion*

- How is the technician progressing through the scheme?
- What is the technician doing well in their role?
- Are there any areas that the technician is finding difficult and requires additional support?
- Are there any features of the technician's performance that you are concerned about?
- Does the technician have any weaknesses in their role where you can offer support?
- Is the technician's level of confidence appropriate in their role?
- How has the technician performed in quieter sessions?
- How has the technician performed in busier sessions?
- Would you recommend that the technician continue with the scheme?
- Are there any other comments that you feel may be relevant?