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# **A Competency Framework for Pharmacy Practitioners: General Level Handbook**

Second Edition

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# Introduction

The purpose of this document is to provide guidance on a competency framework that supports the development of pharmacists as safe, effective general level practitioners. In hospital general level would mean the equivalent of a B grade pharmacist. In primary care this framework is aimed at pharmacists working either full-time, part-time or on a sessional basis for PCTs, or GP practices providing audit support and/or medication review services, and pharmacists working full or part time in a registered pharmacy premises in the community.

The framework will:

- Facilitate continuing professional development.
- Help individuals and their tutors define gaps in knowledge and skills, and identify training and development needs.
- Provide documentary support for appraisals.

The first edition of this framework was evaluated among general level hospital practitioners. Others have found it valuable in the development of more senior practitioners. Appendices 1-3 provide information about the evaluation of the framework in secondary care. Individuals with no prior experience of this framework may find it useful to read these.

The purpose of this second edition is to evaluate the use of this competency framework for the professional development of general level pharmacists in primary care settings. This edition has been developed primarily from the first edition as many of the core competencies for pharmacy practice are the same across all sectors. However, this document has been further refined through a wide consultation process with primary care practitioners and key primary care stakeholder organisations (see appendix 4).

# Competencies and their uses

## What is a competency framework?

Competence is the ability to carry out a job or task. A competency is a quality or characteristic of a person related to effective or superior performance. It is made up of many things e.g. motives, traits, skills etc. A behavioural competency describes typical behaviour observed when effective performers apply motives, traits, skill etc to job relevant tasks.

Different organisations define competency in different ways. The NHS identifies three main models of competence.

**Outcome (standards) model:** essentially expectations of an individual undertaking a particular area of work or work role. This model has its origins in national occupational standards, which form the basis of vocational qualifications (S/NVQs). A task-based competency is often referred to as a competence, and its assessment is criterion referenced.

**Educational model:** focuses on what an individual needs to know or be able to do by the end of a period of learning, usually in the form of stated learning outcomes. Assessment is usually norm-referenced or grade-related.

**Personal model:** deals with the underlying characteristics of an individual that result in effective performance. These qualities often relate to knowledge, skills, motives and personal traits. Most commonly applied to management, the model relies on behavioural indicators and is useful in self-assessment and individual development.

The NHS Knowledge and Skills Framework and Development Review Guidance (NHS Exec, 2003)

**This general level competency framework has been developed using a *hybrid approach*. While behavioural competencies help individuals (and their managers) look at how they do their job, the outcome model identifies whether someone is effective in a particular area of work.**

**A *competency framework* is a collection of competencies that are thought to be central to effective performance.**

## **What can competency frameworks be used for?**

Competency frameworks can be used to support a range of different things. Typically, they are used to help with:

- ❑ **Training and development**
- ❑ **Recruitment**
- ❑ **Performance review**

We envisage that this framework will be used in the first instance to help with training and development activities (see below). However, as the pharmacist develops, the framework also has the potential to be used as an aid to recruitment and as a tool to help in appraisal.

## **How can the framework help in training and development?**

The framework can be used in the following ways:

- ❑ **As a tool to facilitate an individual's CPD**
- ❑ **To help individuals and managers define competency gaps and identify specific training and development needs**
- ❑ **To help identify, at organisational level, training and development needs that may be common to all general level pharmacists**
- ❑ **To provide a framework to support local recruitment and appraisal process**

# Introducing the Framework

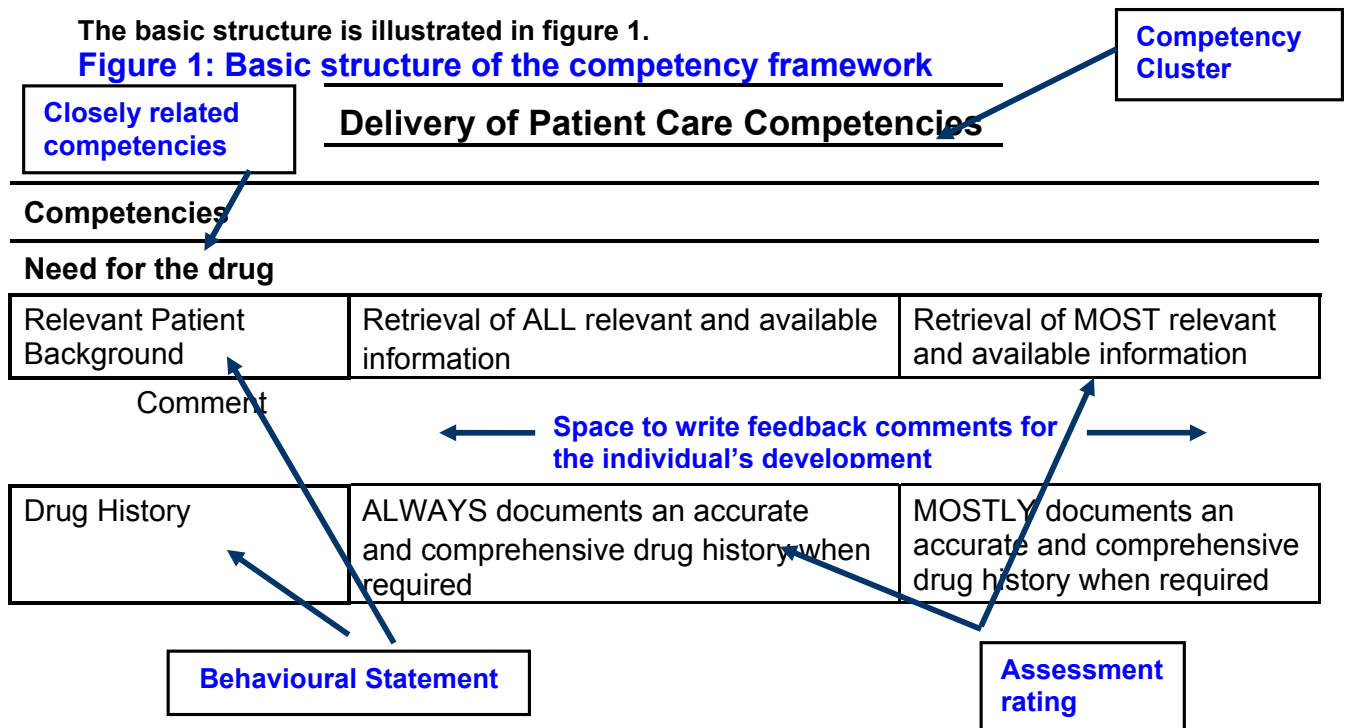
## The structure of the framework

This framework is made up of the following components:

- The main areas of competency (**competency cluster**), which are:
  - Delivery of patient care
  - Problem solving
  - Personal
  - Management and Organisation
  
- Each of these clusters contains closely related competencies. Using the *Delivery of patient care* competency cluster as an example, the **competencies** in this area pertain to:
  - Patient consultation
  - Need for the drug
  - Selection of drug
  - Drug specific Issues
  - Provision of drug product
  - Medicines information and patient education
  - Monitoring drug therapy
  - Evaluation of outcomes
  
- Each of these competencies has:
  - A number of statements, known as **behavioural statements** that define how that competency would be recognised.
  - An **assessment rating** ranging from always, usually, sometimes or never.

The basic structure is illustrated in figure 1.

**Figure 1: Basic structure of the competency framework**



## Assessment Rating

The assessment rating is on a 4-point scale ranging from never, sometimes, usually and always.

Feedback from the evaluation in secondary care suggested the definitions below for the assessment ratings. Assessment should be referenced to the *norm* or *standard practice* that would be expected at a general level. This may vary between areas, trusts or organisations.

Rating	Definitions	Percentage expression
<b>Always</b>	Demonstrates the expected standard practice with very rare lapses	85-100 %
<b>Mostly</b>	Implies standard practice with occasional lapses	51-84 %
<b>Sometimes</b>	Much more haphazard than “mostly”	21-50 %
<b>Never</b>	Very rarely meets the standard expected. No logical thought process appears to apply	0-20 %

## Guidance notes on assessment

There are various acceptable methods of assessment using the framework. This includes assessment by another individual and self assessment. In the secondary care evaluation where there are several pharmacists both senior and junior, professional development was facilitated by structured assessment alongside annual appraisal. This included day to day observations; accompanied visits; using other staff to assess; and unusual clinical situations.

### Day to day observations

In the secondary care evaluation this method of assessment was used in sites where junior pharmacists are supervised day-to-day by a more experienced member of staff; for example, ward based teams or senior pharmacy manager. In community pharmacy this option might be useful in pharmacies with more than one pharmacist.



## **Accompanied visits**

This option is appropriate was used if the assessor or facilitator did not have the opportunity to observe the pharmacist's daily practice and hence needed to make arrangements to accompany the pharmacist in their work. Assessment was based on a number of briefer accompanied ward visits or during a morning at work.

Two different types of accompanied visits were used successfully in the secondary care evaluation.

### *1. Assessment with learning*

An interactive accompanied visit, which included an assessment component and a training component. In this situation, the assessor asked questions for clarification and to identify learning points.

### *2. Assessment only*

This has been described as shadowing. Here the interaction between the assessor and practitioner was more limited (unless there was an issue of patient care to resolve). Feedback was reserved until the assessment was completed.

## **Using other staff to assess**

The use of staff, other than the assessor, to assess competencies was found useful in the secondary care trial. This included other pharmacists, technicians, nurses, medical staff or other relevant personnel. The opinion of other staff may be particularly helpful in relation to problem solving and personal competencies. However, assessment should not be based solely on the reports of staff other than the designated assessors. The assessment should at least include some direct observation.

## **Unusual clinical situations**

There were occasions during the assessments in secondary care when there were no patients to demonstrate a particular competency e.g. drug/patient interactions. In these circumstances, the assessor constructed a hypothetical scenario i.e. for drug/patient interactions they might ask how the patient management would change if the patient was pregnant. The assessment is then based on their response.

## Assessment in Primary Care

In primary care pharmacists generally work in professional isolation and thus direct assessment is less appropriate. In this evaluation the pharmacists will complete a self assessment and identify their individual learning needs from this. They will receive two visits during the evaluation from a facilitator who will help them in this process. The facilitator will review the evidence the pharmacist has collected to support their self assessment, as well as provide guidance on how the pharmacist can meet their learning needs. This mimics the accompanied visit assessment with learning, used in the secondary care evaluation.

The sources of evidence collected to support self assessment form part of the pharmacists CPD. These can include:

- Plan and record documentation from the RPSGB's CPD folder
- Case scenarios
- Intervention records
- Anonymised pharmaceutical care records
- Any written documentation or procedures used in their practice
- Records relating to any continuing education undertaken.

## Using the rating scale

The following is an example of how to assess an individual against the four-point scale.

Following an accompanied visit, it was seen that the individual sometimes identifies a drug-drug interaction, prioritises them appropriately and takes appropriate action when they discover it.

This would be assessed by:

*Sometimes* identify drug interaction

*Always* prioritises appropriately

*Always* appropriate action.

Highlighting that they follow through appropriately but need further development on identifying the interactions.

### **Who does the assessment?**

In this evaluation the pharmacists will be assessing themselves with help from trained facilitators who are also experienced primary care practitioners.

### **Setting a standard**

In the secondary care evaluation the individual hospital trusts set predefined standards that the general level pharmacist could be compared to. This is not currently appropriate in primary care, although some competencies will obviously have a minimum standard e.g. legal requirements. The facilitator will help the individual pharmacist set their own minimum standard that is relevant to their area of practice.

# Competency Framework

# **Delivery of Patient Care Competencies**

# Delivery of Patient Care Competencies

## Patient Consultation

This competency incorporates the structure and processes needed to provide a patient with advice. This advice may be part of a request for the treatment of symptoms e.g. pain, whether coming from an in-patient or an out-patient in hospital or in the community. The personal skills needed for effective communication in this process are described in the personal competencies cluster. The Society has produced guidance on the process of responding to symptoms<sup>1</sup>. This approach is relevant irrespective of the sector of practice. There must be a system in place to support quality and consistency whilst allowing the user to bring in their own knowledge and experience. An appropriate system could also aid data collection and audit.

## Patient Assessment

The pharmacist should:

- Recognise and interpret the condition. This includes exploring the following:
  - ❖ The identity of the patient.
  - ❖ The nature and duration of the symptoms.
  - ❖ Other symptoms that may be associated with the condition. Where appropriate observe other signs, visible or otherwise.
  - ❖ Concurrent or recent medication to exclude adverse drug reactions.
  
- The following should always be referred:
  - ❖ Symptoms that are potentially serious
  - ❖ Persistent symptoms
  - ❖ Patients at increased risk
  
- Take particular care when dealing with:
  - ❖ Babies
  - ❖ Infants and children
  - ❖ Pregnant women
  - ❖ Breast feeding mothers
  - ❖ Older people

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<sup>1</sup> Guidance on Counter Prescribing. *Pharm J* 2000; **265**: 359

## Consultation or referral

The pharmacist should:

- Determine the goal of treatment which might be one of the following:
  - ❖ Curing a disease or disorder
  - ❖ Reducing or eliminating a symptom
  - ❖ Arresting or slowing disease progression
  - ❖ Preventing a disease or pregnancy
  - ❖ A combination of any of the above
  
- Recommend a treatment, taking into account the patient's own health beliefs and preferences. The action taken might be one of the following:
  - ❖ Give self-care advice and/or reassurance without recommending a medicine or other treatment
  - ❖ Recommend a medicine or treatment
  - ❖ Refer to someone else
  - ❖ A combination of any of the above
  
- Provide advice. The following information should be provided where appropriate:
  - ❖ Information on why a particular course of action is being suggested and how to achieve the intended outcomes
  - ❖ Information on the condition as assessed during the consultation and any changes that need to be monitored
  - ❖ Information on the medicine or treatment recommended and how to use it
  - ❖ Advice on when it would be appropriate to seek further advice from either the pharmacist or someone else if the condition does not improve.
  - ❖ A combination of any of the above

The pharmacist should demonstrate a structured, patient-centered process of consultation with patients and carers.

The general level pharmacist should be aware of their own limitations and always consult a colleague if necessary or refer the patient appropriately. The referral and consultation process should form part of continuing professional development and it is expected that during the course of an individual's work, repeated exposure to similar pharmaceutical problems will result in development of the general level pharmacist's experience and competence.

### **Recording Consultations**

In order to allow monitoring of the treatment that has been recommended and allow audit of care, a record of the consultation should be made in appropriate cases in the patient's records.

### **Patient Consent**

As pharmacists develop new roles and provide additional services they will require a greater understanding of the issues surrounding consent. This has an increasing focus for NHS services<sup>2</sup>. There are already key areas of practice where consent is obtained e.g. sharing of patient information, recording of patient information in patient medication records (PMR). Additional services such as screening or monitoring for chronic diseases, medication review, and prescribing and patient group directions (PGD) usage all require patient consent.

## **Need for the drug**

### **Relevant patient background**

In providing pharmaceutical care for a patient it is essential that background information about the patient's health and social status is identified. Without this information it is difficult to establish the existence of, or potential for, medication related problems. Review of prescriptions without this information risks flawed judgements on the appropriateness of therapy for that individual. The detail required will vary depending on the circumstances. Sources of patient information include medical, nursing and electronic records, as well as directly from the patient or carer themselves.

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<sup>2</sup> 12 Key points on consent: The law in England. London; Department of Health, 2001



Details required may include:

- *Age* – the very young and the very old are most at risk of medication related problems. A patients' age will indicate their likely ability to metabolise and excrete medicines and therefore have implications for appropriate selection of drug dosage.
- *Gender* – may impact on the choice of therapy for certain conditions.
- *Ethnic background/religion* – pharmaceutical implications of this information include racial pre-dispositions to intolerance or ineffectiveness of drug classes e.g. ACE-inhibitors in afro-Caribbean individuals or the unsuitability of drug formulations e.g. blood products in Jehovah's Witness patients, porcine derived products for Jewish patients.
- *Social background* – this may impact on their ability to manage their medicines and may influence their pharmaceutical care needs e.g. what are their home circumstances – do they live in their own home or in residential accommodation? Do they have a visiting district nurse or carer etc.
- *Presenting condition* - need to establish what symptoms the patient described and the signs identified by the doctor on examination – could they be attributed to the side-effects of prescribed or purchased medicines.
- *Working diagnosis* - of the medical team treating the patient. How would you expect this condition to be managed? What drug therapy would be considered appropriate and evidenced based? This will give you an indication as to the classes of medications you expect to see on the prescription (this could be in the form of a drug chart in hospital or a prescription in the community ).
- *Previous medical history* - establishing concurrent medical conditions will help you to ensure that management of the acute newly diagnosed problem does not compromise a prior condition, and guide the selection of appropriate therapy by identifying potential contraindications.
- *Relevant laboratory or other physical findings of the medical examination?* (If available) - focus on findings that will affect drug therapy, including:
  - Renal function
  - Liver function
  - Full blood count

- Blood pressure
- Cardiac rhythm

Consider not only the impact that these findings could have on the ongoing management of drug therapy, e.g. need for dose adjustments, but also whether these results could have been caused by an unwanted drug effect.

**Establishing this background information will allow you to make more accurate assessment of the appropriateness of recommendations.**

Obtaining relevant information will depend on your sector of practice. Routine review of medical notes (if available) may be inappropriate and unnecessary for the retrieval of basic information, and the most concise information source should be used. Possible sources of information include:

- *Patients* – patients are often able to provide information, particularly in relation to medicine taking, although some skill is required in terms of managing the consultation to avoid becoming sidetracked. However, there are times when they are the only accurate source for the information you require.
- *Medical notes* – will provide the most detailed description of the patient's care to date, although they are often lengthy and repetitive and should therefore be used to confirm findings rather than as a first source of reference. Previous hospital admissions and subsequent discharge summaries are often useful to clarify medication histories.
- *Pharmacy based information* – e.g. *Patient Medication Records (PMR)*. In community pharmacy an up to date PMR is the most accessible and relevant source of information about the patient's medication history.
- *Nursing 'Kardex'* – In a hospital setting, this is usually an excellent basic summary of the patient's admission details and should be used as the first source of information. It is concise and accessible and will provide all of the key features identified above, with the possible exception of laboratory findings, although abnormal results are often commented upon. In primary care, if pharmacists provide domiciliary visits, then nursing care plans are

normally found in the patient's home if they are being treated by community nurses.

- *Nurses (including practice and district nurses)* – are the frontline care providers for the patients in hospital and increasingly in primary. Hence developing a good working relationship with the nurses is a valuable exercise. In hospital a daily handover from the nursing team can prove to be an excellent source on information about the patient's current condition.

- *Allied health care professionals* - e.g. physiotherapists, social services care workers, occupational therapists etc. maybe involved in the patient's medicines management e.g. assessing compliance and recommending compliance aids.

- *Laboratory results systems*

If laboratory results are readily available, the general level pharmacist should ensure that they have personal access and have been trained in retrieving correct patient information from the database.

Finally remember that all patient information that comes to your attention is CONFIDENTIAL and should not be discussed with anyone not involved in that patient's care.

## **Drug history**

Taking a complete drug history may not always form part of the service the pharmacist is delivering. However, pharmacists need to be aware of the patient's medications. This process is included in the patient assessment behaviour in the patient consultation competency above.

**Complete Drug History:** a clinical process that includes identification of drug allergies or serious ADRs; information gathering from the patient; and documentation of information. It forms part of medication review and admission into hospital.

Taking accurate and complete drug histories has been shown to have a beneficial effect on patient care<sup>3,4</sup>. Pharmacists have demonstrated that they can accurately and reliably take drug histories<sup>5</sup>. The benefit to the patient is that errors of omission or transcription are identified and corrected early, reducing the risk of harm and improving care<sup>2</sup>.

Queries regarding drug therapy should be clarified with the prescriber, or referred to a more senior pharmacist. Table 1 describes the core components of a drug history, although individual organisations may have additional components they wish to routinely include (refer to local guidelines).

**Table 1. Core components of a complete drug history**

1. Introduce yourself to the patient and explain the purpose of the visit/consultation.
2. Identify any drug allergies or serious ADRs - record these in the appropriate box on the drug chart, PMR or care notes<sup>6</sup>.
3. Ascertain any information the patient is able to provide about their drug therapy from (in order of priority):
  - their own knowledge,
  - the drugs they brought in,
  - a GP referral letter,
  - a copy of a recent FP10/repeat prescription list
  - information from medical notes
  - phoning the GP
4. Ensure the following are recorded:
  - generic name of the medicine (brand name to be recorded where appropriate).
  - dose
  - frequency
  - length of therapy if appropriate (e.g. antibiotics)
5. Ensure that items such as inhalers, eye drops & topical agents are included and are used correctly, as patients often do not consider these to be 'medicines'.
6. Ascertain their adherence to the prescribed medication regimen.
7. Consider practical issues such as swallowing difficulties, ability to read labels and written information, container preferences, ordering or supply problems.
8. Identify any self-treatment that the patient may be using e.g. OTC, herbal, homeopathic remedies.
9. Document the drug therapy in an appropriate format.
10. Note any discrepancies between your drug history and that recorded by other medical staff.
11. Ascertain if these discrepancies are intentional (from patient, nursing staff, medical staff, medical notes).
12. Non-intentional discrepancies should be communicated to the medical staff including nursing staff as appropriate.
13. Document any other important drug related information in an appropriate manner e.g. Chronic Renal Failure, dialysis, steroid dependent etc.

<sup>3</sup> Beers MH, Munekata M, Storrie M. The accuracy of medication histories in the hospital medical records of elderly person. *J Am Geriatr Soc.* 1990;38:1183-7.

<sup>4</sup> Nester TM, Hale LS. Effectiveness of a pharmacist-acquired medication history in promoting patient safety. *Am J Health-Syst Pharm* 2002;59(22):2221-5.

<sup>5</sup> Gurwich EL. Comparison of medication histories acquired by pharmacists and physicians. *Am J Hosp Pharm.* 1983;40:1541-2.

## Selection of Drug

This relates to the principles of evidence-based medicine, clinical and cost-effectiveness in the selection of the most appropriate drug, dose and formulation for an individual patient. General level pharmacists are not expected to know the full breadth of clinical evidence for all conditions, but should familiarise themselves with and be able to demonstrate appreciation of key literature relevant to their current field of practice e.g. for respiratory conditions they should know the BTS/SIGN guidelines on the management of asthma, COPD etc. Pharmacists should also be aware of local trust formularies. Postgraduate education and continuing professional development should be guided by learning needs identified in practice.

## Drug-drug interactions

General level pharmacists are expected to:

- ❑ Identify common, well-documented, *actual* drug interactions.
- ❑ Be able to recognise those drugs with increased risk of *potential* interactions e.g.
  - ❖ drugs with narrow therapeutic indices
  - ❖ drugs metabolised by the CYP450 system
  - ❖ drugs which are inducers or inhibitors of the CYP450 system
- ❑ Assess the actual or potential interaction for clinical significance, management options and refer appropriately.

## Drug-patient interactions

This refers to *individual, patient specific* reactions and *contra-indications/cautions* to medicines in certain patient groups e.g. children and pregnancy. A general level pharmacist should:

- ❑ Understand the *potential* for unwanted effects of medicines e.g. allergies and other adverse drug reactions (ADR's).
- ❑ Ensure that any allergy or ADR is identified and documented.
- ❑ Review the prescription to ensure that no culprit medicines have been prescribed.
- ❑ Take appropriate action to ensure that no harm comes to the patient.

## Drug-disease interactions

This refers to the *contra-indications/cautions* that should be applied to the use of individual drugs in a range of pathophysiological conditions. A general level pharmacist should be able to:

- ❑ Understand the mode of action and pharmacokinetics of medicines.
- ❑ Understand how these mechanisms may be altered by the *disease* (e.g. renal impairment).
- ❑ Understand how these mechanisms may be altered by genetic determinants e.g. beta blockers in patients of afro-Caribbean origins.
- ❑ Take appropriate action to ensure that the patient comes to no harm.

## Drug Specific Issues

The pharmacist should ensure that the medicine as prescribed can be administered safely and effectively to the individual patient. The pharmacist should:

- ❑ Assess the prescription to ensure that the dose is appropriate. This includes adjustments for route and formulation prescribed e.g. IV versus PO metronidazole, IM versus PO anti-psychotics, liquid versus solid dosage forms.
- ❑ Is the prescribed route *available* for that patient? (E.g. is the patient nil by mouth? Are they able to take medicines orally?) and *appropriate* for that patient? (e.g. unnecessary prescription of IV medication when the patient can swallow, or a solid dosage form when the patient has dysphagia.)
- ❑ Is the medicine available in a suitable form for administration via the prescribed route?
- ❑ Do the nurses or care staff require any specific information in order to administer the medicine safely? (e.g. appropriateness of crushing tablets, dilution requirements for parenteral medication, rate of administration, iv compatibilities including syringe drivers etc.)
- ❑ Are aids required to ensure safe and effective administration? e.g. volumatics for inhalers
- ❑ Documentation should be completed to ensure the safe and effective administration of the medicine.

Particular attention should be paid to the monitoring of parenteral therapy, which carries the additional risk of extravasation, infection and administration errors.

## **Provision of drug product**

The pharmacist is responsible for the efficient supply of medicines to patients. When supplying a medicine for an individual patient the pharmacist should:

- ❑ Ensure the prescription is clear, unambiguous and legal in the country it is being dispensed in. Pharmacists may need to take into account the different rules in England, Scotland and Wales (e.g. drug tariff and exemptions).
- ❑ Consider the availability of the drug within the hospital or community (i.e. formulary, drug tariff and local shared care policy).
- ❑ Consider whether the prescribed indication is within the medicine's license (unlicensed drugs procedure).
- ❑ Follow local guidelines to obtain unlicensed and non-formulary medicines and ensure that appropriate documentation is completed.
- ❑ Communicate clearly with the relevant people to ensure the efficient and safe supply of medicines.
- ❑ Ensure continuity of supply for in-patient use, discharge and in the community.
- ❑ Document supply issues clearly on the drug chart or prescription and ensure that all instructions are clear. In secondary care endorsement of drug chart should follow local trust guidelines.
- ❑ Ensure medicines are labeled accurately e.g. with clear dosage instructions. Consider products with similar names or packaging, patients with similar names, and dispensing for many family members at the same time.
- ❑ Ensure medicines are labeled appropriately for the patient e.g. the visually impaired, non English speakers.

## **Medicines information and patient education**

It is expected that the pharmacist will provide medicine and health information and advice, both to patients, carers and medical staff. This may be in response to information requested by an individual, but the pharmacist should also seek actively, opportunities to provide this aspect of the pharmacy service.

## **Public Health**

Pharmacists should actively explore the patient's need for lifestyle advice e.g diet, smoking and exercise. An awareness of local services and initiatives and the referral process in primary care or discharge planning is essential.

## **Health Needs**

The pharmacist must take into account the patient's cultural and social background when assessing their health need. This will influence their health beliefs and may affect the style of communication adopted.

## **Need for information is identified**

It is important that the pharmacist is aware of differing individual needs for information and facilitate its provision in an appropriate format. Pharmacists should be cautious about providing information to patients in a 'blanket' format. This may not be appropriate for patients who have been on a medicine long term and require specific information relevant to their situation – this will not be established unless the pharmacist allows the patient an opportunity early in the consultation to ask their own questions.

## **Medicines information**

The pharmacist should ensure the accuracy of the medicine information they provide, utilise appropriate resources and consult with appropriate colleagues if unsure. The information should then be delivered in a manner appropriate to the recipient. Jargon should be avoided when speaking to patients, but caution is required not to cause confusion by trying to over simplify information – many warfarin patients will have no more idea about the state of their blood if it is described as 'too thin' or 'too thick' or the implications for their health, than if given a list of the clotting factors that warfarin inhibits.

## **Provision of written information**

Where necessary the pharmacist may provide written medicine information.

- A product information leaflet must be provided with dispensed medicines. This is now a legal requirement and all manufacturers produce them.
- Health information leaflets are produced by many national organisations e.g. Diabetes UK, British Heart Foundation. Pharmacists should be aware of and provide these valuable resources.



- Patients may need specific information e.g. medicines reminder chart. The individual preparing the information should ensure that the print is legible, of an appropriately sized font, and that the information is accurate. Written information should be signed and dated to facilitate the response to any subsequent queries.

## **Monitoring drug therapy**

Once a drug has been appropriately selected for a patient, supplied and administered, ongoing use of the drug should be assessed, both for the desired therapeutic effect and the appearance of adverse reactions. Therapeutic drug monitoring (TDM) is an essential duty for hospital pharmacists. Pharmacists in primary care may not always have access to this information but need to be aware of its importance.

## **Identification and prioritisation of medicines management problems**

The pharmacist should be able to identify patients for whom ongoing monitoring of therapy is required. They should be able to identify monitoring parameters for effectiveness of treatment and potential adverse effects of drug therapy and establish and maintain a plan for reviewing the therapeutic objective/end point of treatment. This may be necessary due to characteristics of the medicine or particular patient needs.

### *Drug characteristics*

The pharmacist should:

1. Identify patients prescribed drugs with narrow therapeutic indices and be familiar with the monitoring parameters for these drugs. These include:
  - ❖ Warfarin
  - ❖ Digoxin
  - ❖ Phenytoin
  - ❖ Carbamazepine
  - ❖ Vancomycin
  - ❖ Gentamicin
  - ❖ Theophylline
  - ❖ Lithium
  - ❖ Unfractionated heparin

**NB This list is not exhaustive (refer to local guidelines)**

2. For drugs amenable to TDM and where the information is available, calculate predicted levels if no patient serum concentrations are available
3. Identify monitoring parameters for ongoing disease management e.g BP, cholesterol etc.
4. Evaluate the patient against these parameters
5. Recommend appropriate monitoring to medical staff
6. Discuss with a colleague if necessary
7. Discuss changes to medication with medical staff if required

*Patient characteristics*

The pharmacist should be able to recognise those patients who will require ongoing pharmaceutical input because of their clinical condition. For example, concomitant:

- Renal impairment
- Hepatic impairment or
- An unstable clinical condition

The pharmacist should be able to prioritise the medicines management problems of both individual patients and the group of patients for whom they are responsible.

**Use of guidelines**

A general level pharmacist should be able to demonstrate an awareness of guidelines available for the clinical field in which they are practicing. Pharmacists should also know the practical implications of these guidelines. Guidelines may be local policies or national guidelines from established groups (e.g. British Thoracic Society guidelines for respiratory diseases, National Service Frameworks, NICE guidance, Trust nil by mouth policy or peri-operative sliding scales guidelines on surgical wards).

The pharmacist should be able to utilise guidelines and be aware of both the advantages and disadvantages of their use, and show regard for individual patient need when using guidelines.

## **Resolution of medicines management problems**

Having identified and prioritised medicines management problems, the pharmacist should ensure that an appropriate action to this problem is identified and implemented. If resolution requires the input of a number of staff, the action required and the urgency of that action must be accurately communicated to the relevant personnel. At all times, the pharmacist must ensure that no harm comes to the patient.

## **Record of contributions**

Where relevant, the general level pharmacist should document information to support their contribution to patient care and ensure information is available to other members of staff.

## **Evaluation of outcomes**

Reflection and evaluation of practice is essential if an individual pharmacist is going to undertake effective work based learning. Contributions to care should be recorded and followed up where possible to establish the outcomes of individual actions. It may not be appropriate or possible for a general level pharmacist to follow the care of an individual patient every time, but effective communication with colleagues will often establish outcomes.

There are different mechanisms for assuring evaluation of contributions:

- Actual feedback from patient, carer, or health professional on a specific issue/service
- Reflecting on service delivery or patient encounter and as a result identifying a service improvement need or a learning need from it.

The pharmacist should be able to demonstrate that they reflect on their contributions and learn from the outcomes.



## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Patient Consultation

<b>Patient Assessment</b>	ALWAYS uses appropriate questioning to obtain relevant information from the patient	a	b	USUALLY uses appropriate questioning to obtain all relevant information from the patient	a	b	SOMETIMES uses appropriate questioning to obtain all relevant information from the patient	a	b	Does NOT use appropriate questioning to obtain all relevant information from the patient	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Consultation or referral</b>	Pharmaceutical or health problems are ALWAYS appropriately referred	a	b	Pharmaceutical or health problems are USUALLY appropriately referred	a	b	Pharmaceutical or health problems are SOMETIMES appropriately referred	a	b	Does NOT appropriately refer pharmaceutical or health problems	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Recording Consultations</b>	ALWAYS documents consultation where appropriate in the patient's records	a	b	USUALLY documents consultation where appropriate in the patient's records	a	b	SOMETIMES documents consultation where appropriate in the patient's records	a	b	Does NOT document consultation where appropriate in the patient's records	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Patient consent</b>	ALWAYS satisfactorily obtains patient consent if appropriate	a	b	USUALLY satisfactorily obtains patient consent if appropriate	a	b	SOMETIMES satisfactorily obtains patient consent if appropriate	a	b	NEVER satisfactorily obtains patient consent	a	b
		c	d		c	d		c	d		c	d

Comment



## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Need for the drug

Competency	Description	a	b	Competency	a	b	Competency	a	b	Competency	a	b
		c	d		c	d		c	d		c	d
<b>Relevant Patient Background</b>	Retrieval of ALL relevant and available information	a	b	Retrieval of MOST relevant and available information	a	b	Retrieval of SOME relevant and available information	a	b	Does NOT retrieve relevant or available information	a	b
		c	d		c	d		c	d		c	d

Comment

Competency	Description	a	b	Competency	a	b	Competency	a	b	Competency	a	b
		c	d		c	d		c	d		c	d
<b>Drug History</b>	ALWAYS documents an accurate and comprehensive drug history when required	a	b	MOSTLY documents an accurate and comprehensive drug history when required	a	b	SOMETIMES documents an accurate and comprehensive drug history when required	a	b	Does NOT document a drug history for any patient	a	b
		c	d		c	d		c	d		c	d

Comment

#### Selection of drug

Competency	Description	a	b	Competency	a	b	Competency	a	b	Competency	a	b
		c	d		c	d		c	d		c	d
<b>Drug – drug interactions</b>	Drug-drug interactions are ALWAYS identified	a	b	Drug-drug interactions are USUALLY identified	a	b	Drug-drug interactions are SOMETIMES identified	a	b	Does NOT identify any drug-drug interactions	a	b
		c	d		c	d		c	d		c	d
	Drug-drug interactions are ALWAYS appropriately prioritised	a	b	Drug-drug interactions are USUALLY appropriately prioritised	a	b	Drug-drug interactions are SOMETIMES appropriately prioritised	a	b	Does NOT prioritise any drug-drug interactions	a	b
		c	d		c	d		c	d		c	d
	Appropriate action is ALWAYS taken	a	b	Appropriate action is USUALLY taken	a	b	Appropriate action is SOMETIMES taken	a	b	Does NOT take any appropriate action	a	b
		c	d		c	d		c	d		c	d

Comment



## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Selection of Drug

<b>Drug – patient interactions</b>	Drug-patient interactions are ALWAYS identified	a	b	Drug-patient interactions are USUALLY identified	a	b	Drug-patient interactions are SOMETIMES identified	a	b	Does NOT identify any drug-patient interactions	a	b
		c	d		c	d		c	d			
	Drug-patient interactions are ALWAYS appropriately prioritised	a	b	Drug-patient interactions are USUALLY appropriately prioritised	a	b	Drug-patient interactions are SOMETIMES appropriately prioritised	a	b	Does NOT prioritise any drug-patient interactions	a	b
		c	d		c	d		c	d			
	Appropriate action is ALWAYS taken	a	b	Appropriate action is USUALLY taken	a	b	Appropriate action is SOMETIMES taken	a	b	Does NOT take any appropriate action	a	b
		c	d		c	d		c	d			

Comment

<b>Drug – disease interactions</b>	Drug-disease interactions are ALWAYS identified	a	b	Drug-disease interactions are USUALLY identified	a	b	Drug-disease interactions are SOMETIMES identified	a	b	Does NOT identify any drug-disease interactions	a	b
		c	d		c	d		c	d			
	Drug-disease interactions are ALWAYS appropriately prioritised	a	b	Drug-disease interactions are USUALLY appropriately prioritised	a	b	Drug-disease interactions are SOMETIMES appropriately prioritised	a	b	Does NOT prioritise any drug-disease interactions	a	b
		c	d		c	d		c	d			
	Appropriate action is ALWAYS taken	a	b	Appropriate action is USUALLY taken	a	b	Appropriate action is SOMETIMES taken	a	b	Does NOT take any appropriate action	a	b
		c	d		c	d		c	d			

Comment



## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Drug Specific Issues

<b>Ensures appropriate dose</b>	Appropriate dose is ALWAYS ensured	a	b	Appropriate dose is USUALLY ensured	a	b	Appropriate dose is SOMETIMES ensured	a	b	Does NOT ensure appropriate doses for any patient	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Selection of dosing regimen</b>	Appropriate route is ALWAYS ensured	a	b	Appropriate route is USUALLY ensured	a	b	Appropriate route is SOMETIMES ensured	a	b	Does NOT ensure appropriate route for any patient	a	b
		c	d		c	d		c	d		c	d
	Appropriate timing of dose is ALWAYS ensured	a	b	Appropriate timing of dose is USUALLY ensured	a	b	Appropriate timing of dose is SOMETIMES ensured	a	b	Does NOT ensure appropriate timing of dose	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Selection of formulation and concentration</b>	Appropriate formulation is ALWAYS ensured	a	b	Appropriate formulation is USUALLY ensured	a	b	Appropriate formulation is SOMETIMES ensured	a	b	Does NOT ensure appropriate formulation for any patient	a	b
		c	d		c	d		c	d		c	d
	Appropriate concentration is ALWAYS ensured	a	b	Appropriate concentration is USUALLY ensured	a	b	Appropriate concentration is SOMETIMES ensured	a	b	Does NOT ensure appropriate concentration for any patient	a	b
		c	d		c	d		c	d		c	d

Comment



## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Provision of drug product

<b>The prescription is clear</b>	ALWAYS ensures the prescriber's intentions are clear	a	b	USUALLY ensures the prescriber's intentions are clear	a	b	SOMETIMES ensures the prescriber's intentions are clear	a	b	Does NOT ensure the prescriber's intentions are clear for any patient	a	b
		c	d		c	d		c	d		c	d

Comment

<b>The prescription is legal</b>	Legality of prescription is ALWAYS ensured	a	b	Legality of prescription is USUALLY ensured	a	b	Legality of prescription is SOMETIMES ensured	a	b	Does NOT ensure appropriate regimen for any patient	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Labelling of the medicine</b>	The label on the dispensed medicine ALWAYS includes required information	a	b	The label on the dispensed medicine USUALLY includes required information	a	b	The label on the dispensed medicine SOMETIMES includes required information	a	b	The label on the dispensed medicine NEVER includes required information	a	b
		c	d		c	d		c	d		c	d
	The dispensed medicine is ALWAYS labelled appropriately for the patient	a	b	The dispensed medicine is USUALLY labelled appropriately for the patient	a	b	The dispensed medicine is SOMETIMES labelled appropriately for the patient	a	b	The dispensed medicine is NEVER labelled appropriately for the patient	a	b
		c	d		c	d		c	d		c	d

Comment





## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Medicines Information and patient education

<b>Public Health</b>	ALWAYS provides lifestyle advice appropriately	a	b	USUALLY provides lifestyle advice appropriately	a	b	SOMETIMES provides lifestyle advice appropriately	a	b	Does NOT provide lifestyle advice appropriately	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Health Needs</b>	ALWAYS takes into account the patient's individual circumstances	a	b	USUALLY takes into account the patient's individual circumstances	a	b	SOMETIMES takes into account the patient's individual circumstances	a	b	Does NOT take into account the patient's individual circumstances	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Need for information is identified</b>	Patient need for information is ALWAYS accurately identified	a	b	Patient need for information is USUALLY accurately identified	a	b	Patient need for information is SOMETIMES accurately identified	a	b	Did NOT identify the need for information in any patient	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Medicines Information</b>	Accurate and appropriate medicines information is ALWAYS communicated	a	b	Accurate and appropriate medicines information is USUALLY communicated	a	b	Accurate and appropriate medicines information is SOMETIMES communicated	a	b	Did NOT communicate accurate and appropriate medicines information	a	b
		c	d		c	d		c	d		c	d

Comment



## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Medicines Information and patient education

Provision of written information	Appropriate information is ALWAYS provided	a	b	Appropriate information is USUALLY provided	a	b	Appropriate information is SOMETIMES provided	a	b	Did NOT provide appropriate information	a	b
		c	d		c	d		c	d		c	d
Comment												

#### Monitoring drug therapy

Identification of medicines management problems	Medicines management problems are ALWAYS identified	a	b	Medicines management problems are USUALLY identified	a	b	Medicines management problems are SOMETIMES identified	a	b	Does NOT identify any medicines management problems	a	b
		c	d		c	d		c	d		c	d
Comment												

Prioritisation of medicines management problems	Medicines management problems are ALWAYS accurately prioritised	a	b	Medicines management problems are USUALLY accurately prioritised	a	b	Medicines management problems are SOMETIMES accurately prioritised	a	b	Does NOT accurately prioritise any medicines management problems	a	b
		c	d		c	d		c	d		c	d
Comment												

Use of Guidelines	Current clinical guidelines are ALWAYS applied as appropriate	a	b	Current clinical guidelines are USUALLY applied as appropriate	a	b	Current clinical guidelines are SOMETIMES applied as appropriate	a	b	Does NOT apply recent clinical guidelines	a	b
		c	d		c	d		c	d		c	d
Comment												



## Delivery of Patient Care

### Competencies

### Rating

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

#### Monitoring drug therapy

<b>Resolution of medicines management problems</b>	Appropriate action is ALWAYS taken to resolve or refer medicines management problems	a	b	Appropriate action is USUALLY taken to resolve or refer medicines management problems	a	b	Appropriate action is SOMETIMES taken to resolve or refer medicines management problems	a	b	Does NOT appropriately resolve or refer any medicines management problems	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Record of contributions</b>	Appropriate documentation of the intervention is ALWAYS completed	a	b	Appropriate documentation of the intervention is USUALLY completed	a	b	Appropriate documentation of the intervention is SOMETIMES completed	a	b	Does NOT complete appropriate documentation of the intervention	a	b
		c	d		c	d		c	d		c	d

Comments

#### Evaluation of outcomes

<b>Assessing outcomes of contributions</b>	Outcomes of contributions are ALWAYS appropriately assessed	a	b	Outcomes of contributions are USUALLY appropriately assessed	a	b	Outcomes of contributions are SOMETIMES appropriately assessed	a	b	Did NOT appropriately assess outcomes of contributions	a	b
		c	d		c	d		c	d		c	d

General comments

# Personal Competencies

# Personal Competencies

## Organisation

### Prioritisation

The general level pharmacist should be able to prioritise their own work and adjust priorities in response to changing circumstances; for example, knowing which patients/tasks take priority. We recognise that it is not possible or necessary to review the pharmaceutical care of every patient, every day. Guidance for prioritisation of workload in the clinical tasks of the pharmacist is as follows:

- In hospital, identifying all new patients that have arrived since the last pharmacy visit
- In hospital, identifying patients approaching discharge and establishing their need for discharge medicines
- Obtaining and recording an complete drug history for new patients
- Ensuring that all medicines are appropriate and that the patient is informed about their medicines
- Ensuring newly prescribed medicines are safe for the patients and sufficient supplies are available
- Monitoring narrow therapeutic index drugs
- In hospital, monitoring parenteral therapy
- Evaluating current medicines for safety and effectiveness

In community practice prioritisation will depend on the setting and circumstances and may vary on a day to day basis.

### Punctuality

The pharmacist should ensure satisfactory completion of tasks with appropriate handover and recognise the importance of punctuality and attention to detail.

### Initiative

The pharmacist should demonstrate initiative in solving a problem or taking on a new opportunity/task without the prompting from others, and demonstrate the ability to work independently within their limitations.

## Efficiency

This section deals with time management, and the general level pharmacist should demonstrate efficient use of their time. This will involve demonstrating a process of care using their time productively with minimum waste or effort. An example could be reviewing the allocated patients in the given time to an appropriate standard.

## Effective Communication Skills

Good communication is essential if pharmaceutical care is to be provided for patients. This involves communicating effectively in verbal, electronic and written form, using the language appropriate to the recipient; for example, use of open questions initially followed by appropriate closed questions and supporting any recommendations with evidence.

Effective communication encompasses the following skills:

- Questioning.
- Explaining.
- Listening – active listening demonstrates genuine respect and concern for the individual. It involves both verbal and non verbal aspects.
- Feedback – to ensure that the message is understood. It can take the form of appropriate questions and asking the individual to demonstrate that they understand or can now do what you have explained.
- Empathy – seeking to understand where other people are coming from – what their wants and needs are.
- Non verbal communication.
- Over coming physical and emotional barriers to effective communication e.g. speech difficulties, fear and aggression.
- Negotiating.
- Influencing.

The desired outcome of using effective communication skills should be a concordant relationship. There are three aspects of concordance with medicines:

1. Patients as partners: the patient and the healthcare team participate as partners to reach an agreement on the illness and its treatment

2. Patient's beliefs: the agreement on treatment draws on the experiences beliefs and wishes of the patient to decide when, how and why to use medicines.
3. Professional partnerships: healthcare staff treat one another as partners and recognise each other's skills to improve the patient's participation.

### **Patient and carer**

The 'patient' in this context means any person the pharmacist provides any pharmaceutical service to. This includes the 'walking well'. The 'carer' may be a friend or relative as well as a social services or private agency care worker.

### **Medical Staff**

Doctors and dentists, and in some cases veterinary surgeons.

### **Nurses**

This includes nurses providing services in primary and secondary care e.g. health visitors, community psychiatric nurses, ward nursing staff etc.

### **Other healthcare professionals**

This includes physiotherapists, occupational therapists, dieticians, opticians, paramedics etc.

### **Other Health Staff**

This includes the ward clerk, practice manager, GP receptionist, prescription clerk, and medical secretaries.

### **Immediate pharmacy team**

This includes the transfer of information to temporary staff e.g. locum relief pharmacists, as well as other permanent members of the pharmacy team.

### **Mentor/tutor**

Ensure time is allocated for discussion of progress, including strengths and weaknesses.

## **Employing Organisation**

This includes non clinical staff within the organisation e.g. administrators, pay roll, human resources, area managers etc. The organisation might be the hospital trust, the primary care trust or the community pharmacy company.

## **Linked Organisations**

This relates to any communication with other organisations that affect the delivery of patient care, especially involving the transfer of care.

## **Team work**

It is important for the general level pharmacist to be a team player. This includes understanding the roles and responsibilities of team members and how the team works. Respecting the skills and contributions of colleagues and directly managed staff as well as recognizing one's own limitations within the team.

## **Pharmacy team**

Within the pharmacy team, the general level pharmacists should be expected to:

- ❑ Be a committed member of the team
- ❑ Establish good working relationships with all colleagues
- ❑ Accept responsibility for own work (and for those in training where appropriate)
- ❑ Give and receive constructive criticism
- ❑ Work efficiently in a team
- ❑ Share learning experiences with colleagues
- ❑ Know when to ask for help
- ❑ Understand the roles of all other team members
- ❑ Identify when team members need support and provide it
- ❑ Understand individuals' strengths and weaknesses

## **Multi-disciplinary teams**

The pharmacist should recognise the roles and skills of other healthcare professionals and seek to establish co-operative working relationships with colleagues, based on understanding of, and respect for, each other's roles.



## **Organisational team**

The pharmacist should recognise the roles and skills of other non-clinical staff within the organisation.

## **Professionalism**

### **Confidentiality**

As for all health care professionals, pharmacists must respect individuals right to confidentiality, maintain confidentiality and understand the circumstances when information about the patient's condition can be shared with colleagues. This includes an awareness of local trust policies and relevant legislation e.g. Data Protection Act 1998, Caldicott guidance, Code of Ethics. As this behaviour is essential there are no assessment ratings in the competency grid. Confidentiality must always be maintained.

### **Recognition of limitation**

The individual should know their own professional and personal limitations and seek advice or refer when necessary. The individual must continue to work within the professional code of ethics.

### **Quality and Accuracy of Documentation**

General documentation is covered in the Delivery of Patient Care. Within a professional context, pharmacists should ensure that legally required documentation is completed in a timely manner e.g. CD register entries.

### **Legislation**

Pharmacists must be aware of and appropriately implement legislation that directly impinges on the delivery of a service to the individual patient. This includes the Disability Discrimination Act, Child Protection, Human Rights, Working with Vulnerable Adults.

### **Responsibility for own action**

To be responsible is to be prepared to give an account of your professional judgements, acts and omissions in relation to your professional role. Accountability flows from such responsibility. Hence anyone who is responsible is also accountable. In professional ethics accountability is of paramount importance. The code of ethics states that 'pharmacists assuming responsibility for any pharmacy functions whether

as an employee, locum, advisor or otherwise are professionally accountable for all decisions to supply a medicine or offer advice.'

## **Confidence**

All pharmacists must inspire confidence in patients and other healthcare professionals.

## **Responsibility for patient care**

The pharmacist should adopt a non-discriminatory attitude to all patients and recognise their needs as individuals. As part of their responsibility, pharmacists should recognise when to ask for advice and be willing to consult, and to identify and act upon errors.

## **CPD**

The general level pharmacist should understand the need for, and take personal responsibility for, Continuing Professional Development. This involves:

- Reflecting on own practice, e.g. using critical incident review
- Maintaining current awareness of professional, pharmaceutical and clinical issues (e.g. attends clinical pharmacy meetings, CPPE or NPC workshops)
- Maintaining a broad background clinical knowledge
- Recognising and using learning opportunities
- Evaluating learning
- Being self-motivated and eager to learn
- Show willingness to learn from colleagues
- Willingness to accept criticism for the benefit of their own development

Demonstration of the above may be facilitated by review of a CPD record.

## Personal Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Organisation

<b>Prioritisation</b>	ALWAYS prioritises work well	a	b	USUALLY prioritises work well	a	b	Does NOT prioritises work well	a	b	POOR prioritisation results in work not being completed	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Punctuality</b>	ALWAYS punctual	a	b	USUALLY punctual	a	b	SELDOM punctual	a	b	NEVER punctual	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Initiative</b>	ALWAYS demonstrates appropriate initiative	a	b	USUALLY demonstrates appropriate initiative	a	b	SOMETIMES demonstrates appropriate initiative	a	b	Does NOT demonstrate initiative	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Efficiency</b>	ALWAYS uses time efficiently	a	b	USUALLY uses time efficiently	a	b	Inefficient use of time SOMETIMES results in tasks not being satisfactorily completed	a	b	Inefficient use of time results in tasks NEVER being completed	a	b
		c	d		c	d		c	d		c	d

Comment



## Personal Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Effective Communication Skills

<b>Patient and Carer</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Medical Staff</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Nurses</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Other Healthcare Professionals</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment



## Personal Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Effective Communication skills

<b>Other Health Staff</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Immediate Pharmacy Team</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Mentor/tutor</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Employing Organisation</b>	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

## Personal Competencies

**Competencies**

**Rating**

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

**Effective Communication Skills**

Linked Organisations	Communication is ALWAYS clear, precise and appropriate	a	b	Communication is USUALLY clear, precise and appropriate	a	b	Communication is USUALLY clear, precise but NOT appropriate	a	b	Communication is unclear and inappropriate	a	b
		c	d		c	d		c	d		c	d

Comment

**Team work**

Pharmacy Team	ALWAYS recognises value of other staff	a	b	USUALLY recognises value of other staff	a	b	SOMETIMES unaware of value of other staff	a	b	Does NOT value other members of staff	a	b
		c	d		c	d		c	d		c	d
	ALWAYS works effectively as part of a team	a	b	USUALLY works effectively as part of a team	a	b	SOMETIMES an ineffective member of team	a	b	Disruptive in team	a	b
		c	d		c	d		c	d		c	d

Comment

## Personal Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Team work

Multi-disciplinary team	ALWAYS recognises value of other members of the healthcare team	a	b	USUALLY recognises value of other members of the healthcare team	a	b	SOMETIMES unaware of value of other members of the healthcare team	a	b	Does NOT value other members of the healthcare team	a	b
		c	d		c	d		c	d			
	ALWAYS uses appropriate channels to refer patients to other members of the healthcare team	a	b	USUALLY uses appropriate channels to refer patients to other members of the healthcare team	a	b	SOMETIMES uses appropriate channels to refer patients to other members of the healthcare team	a	b	NEVER uses appropriate channels to refer patients to other members of the healthcare team	a	b
		c	d		c	d		c	d			

Comment

Organisational Team	ALWAYS recognises the roles of non-clinical staff within the organisation	a	b	USUALLY recognises the roles of non-clinical staff within the organisation	a	b	SOMETIMES recognises the roles of non-clinical staff within the organisation	a	b	Does NOT recognise the roles of non-clinical staff within the organisation	a	b
		c	d		c	d		c	d			

Comment



## Personal Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Professionalism

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
<b>Confidentiality</b>	ALWAYS maintains confidentiality			(ALWAYS maintains confidentiality)			(ALWAYS maintains confidentiality)			Does NOT always maintain confidentiality		
		c	d		c	d		c	d		c	d

Comment

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
<b>Recognition of limitation</b>	ALWAYS recognises limitations			USUALLY recognises limitations			SELDOM Recognises limitations			UNABLE to recognises limitations		
		c	d		c	d		c	d		c	d

Comment

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
<b>Quality and accuracy of documentation</b>	Legally required information is ALWAYS documented			Legally required information is USUALLY documented			Legally required information is SOMETIMES documented			Does NOT document legally required information		
		c	d		c	d		c	d		c	d

Comment





## Personal Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Professionalism

Competency	Description	a	b	Competency	a	b	Competency	a	b	Competency	a	b
		c	d		c	d		c	d		c	d
Legislation	Can describe ALL the legislation that affects patient care	a	b	Can describe MOST of the legislation that affects patient care	a	b	Can describe SOME of the legislation that affects patient care	a	b	Can NOT describe any legislation that affects patient care	a	b
		c	d		c	d		c	d		c	d

Comment

Competency	Description	a	b	Competency	a	b	Competency	a	b	Competency	a	b
		c	d		c	d		c	d		c	d
Responsibility for own action	ALWAYS takes responsibility for own action	a	b	USUALLY takes responsibility for own action	a	b	FAILS to accept responsibility for own action	a	b	Fails to recognise personal responsibility	a	b
		c	d		c	d		c	d		c	d

Comment

Competency	Description	a	b	Competency	a	b	Competency	a	b	Competency	a	b
		c	d		c	d		c	d		c	d
Confidence	ALWAYS inspires confidence	a	b	USUALLY inspires confidence	a	b	SOMETIMES inspires confidence	a	b	FAILS to inspire confidence	a	b
		c	d		c	d		c	d		c	d

Comment



## Personal Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Professionalism

<b>Responsibility for patient care</b>	ALWAYS takes responsibility for patient care	a	b	USUALLY takes responsibility for patient care	a	b	SOMETIMES fails to accept responsibility for patient care	a	b	FAILS to recognise responsibility for patient care	a	b
		c	d		c	d		c	d		c	d

Comment

<b>CPD</b>	ALWAYS maintains a CPD record	a	b	USUALLY records some evidence	a	b	SOMETIMES records some evidence	a	b	Does NOT maintain a CPD record	a	b
		c	d		c	d		c	d		c	d
	ALWAYS reflects on performance	a	b	USUALLY reflects on performance	a	b	SOMETIMES reflects on performance	a	b	NEVER reflects on performance	a	b
		c	d		c	d		c	d		c	d
	ALWAYS identifies CPD learning needs	a	b	USUALLY identifies CPD learning needs	a	b	SOMETIMES identifies CPD learning needs	a	b	NEVER identifies CPD learning needs	a	b
		c	d		c	d		c	d		c	d
	ALWAYS evaluates learning	a	b	USUALLY evaluates learning	a	b	SOMETIMES evaluates learning	a	b	NEVER evaluates learning	a	b
		c	d		c	d		c	d		c	d

General comments

# **Problem Solving Competencies**

# Problem Solving Competencies

## Gathering information

### Accesses information

The general level pharmacist should be able to demonstrate that they can access all the information necessary in order to undertake a review of the appropriateness, safety and efficacy of the medicines prescribed for a patient. They should be able to access this information from a variety of sources and in the most time-efficient manner.

### Summarises information

Following review of the information, the pharmacist should demonstrate the ability to précis the information, to extract the key points that influence drug therapy and if necessary, be able to relay concisely this information to another colleague.

### Up to date information

Information needed on a day to day basis should be kept up to date. This will include clinical aspects of the patient's care and up to date texts and guidelines.

## Knowledge

### Pathophysiology

An understanding of normal organ function and the effect on this of disease state, is relevant to the effects of, and the effects on, drug therapy. The general level pharmacist should be able to clearly describe the pathophysiology relevant to the therapeutic areas in which they are currently working.

### Pharmacology

The general level pharmacist should be able to clearly discuss the mode of action of medicines that they routinely review in the course of their daily practice. An appreciation of the distribution, metabolism and elimination of these medicines and the influence of disease states (e.g. renal failure) and patient factors (e.g. age) should also be demonstrated.

## **Side effects**

Knowledge of the common and major side effect profile of routinely used medicines must be demonstrated. Pharmacists should be able to both discuss the potential for these with patients and recognise and describe any appropriate monitoring parameters.

## **Interactions**

The general level pharmacists should be able to describe the different mechanisms of drug interactions and be able to identify which type of interaction applies.

## **Analysing information**

### **Evaluates information**

The general level pharmacist should demonstrate the ability to effectively evaluate information they have retrieved. This could be for a variety of purposes including designing a local patient information leaflet or critically appraising information about new products. The pharmacist should be able to assess information for the following aspects

- Reliability of source – depending on the nature of information retrieved, the pharmacist should be able to evaluate the likely accuracy of information and any likelihood of bias (drug company sponsored information).
- Relevance to patient care – the impact or potential impact that the information will have on the pharmaceutical care the patient requires.
- Required response – the pharmacist should demonstrate the ability to identify an appropriate response, both in the nature of the action required and the priority that it should be assigned.

## **Problem identification**

After gathering and evaluating the information, and applying their knowledge, the pharmacist should be able to identify problems where they occur.

## **Appraises options**

The general level pharmacist should demonstrate that they have considered the various options available to them to resolve a problem. They should consider the possible outcomes of any action and recognise the pros and cons of the various options.

## **Decision making**

Having appraised a selection of options, the pharmacist should be able to identify the most appropriate solution and be able to justify the decision taken. However, general level pharmacists should recognise their limitations and seek advice from another colleague wherever necessary.

## **Logical approach**

The pharmacist must develop a logical approach to their work. The competency framework is intended to guide the activities that should be undertaken for each patient or task, to ensure that points are not overlooked. The pharmacist should be able to demonstrate that they use a logical process when reviewing a prescription and that this process identifies the key action points that need to be addressed for that patient. It is recognized, however, that individuals will use different approaches to problem solving and still achieve the required outcome.

## **Providing information**

### **Provides accurate information**

Whenever information is requested, or a need for information is identified, it is the pharmacist's responsibility to ensure that the response they give is accurate. Information should be accessed from a reliable source and, if necessary, reference should be made to appropriate literature or to colleagues.

### **Provides relevant information**

The content and style of presentation should be appropriate to the recipient's needs. Establishing the reason for the request, and appreciating what action will be taken on

receipt of the information, should be a first priority. The general level pharmacist should demonstrate that they have considered these aspects and responded appropriately by tailoring the information that they provide.

### **Provides timely information**

When information is requested, or the need for information is identified, the pharmacist should provide it in a timely manner. It may be that the information is immediately required for patient care and it will take priority over other activities e.g. management of drug alerts. Conversely, other duties may take precedence over a considered review of the literature.

## **Follow up**

### **Ensures resolution of problems**

If a problem is identified by, or reported to a general level pharmacist, it is their responsibility to ensure that it is appropriately resolved. This may not require their direct action, but they must ensure that the appropriate person is alerted to the situation and that accurate information is given to them. As a minimum they must ensure that no harm comes to the patient.

For development purposes the pharmacist should seek to follow up problems, both those that they had dealt with directly and those that were referred to another party, and reflect on the outcomes.

## Problem Solving Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Gathering Information

Accesses Information	ALWAYS able to access information from appropriate information sources	a	b	USUALLY able to access information from appropriate information sources	a	b	SOMETIMES able to access information from appropriate information sources	a	b	NEVER able to access information from appropriate information sources	a	b
		c	d		c	d		c	d		c	d

Comment

Summarises information	ALWAYS able to summarise key points from information gathered	a	b	USUALLY able to summarise key points from information gathered	a	b	SOMETIMES able to summarise key points from information gathered	a	b	NEVER able to summarise key points from information gathered	a	b
		c	d		c	d		c	d		c	d

Comment

Up to date information	ALWAYS keeps information needed on a day to day basis up to date	a	b	USUALLY keeps information needed on a day to day basis up to date	a	b	SOMETIMES keeps information needed on a day to day basis up to date	a	b	NEVER keeps information needed on a day to day basis up to date	a	b
		c	d		c	d		c	d		c	d

Comment



## Problem Solving Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Knowledge

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
Pathophysiology	Knowledge of pathophysiology is EXCELLENT			Knowledge of pathophysiology is GOOD			Knowledge of pathophysiology is REASONABLE			Knowledge of pathophysiology is POOR		

Comment

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
Pharmacology	ALWAYS able to discuss how drugs work			USUALLY able to discuss how drugs work			SOMETIMES able to discuss how drugs work			NEVER able to discuss how drugs work		

Comment

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
Side effects	ALWAYS able to describe the major side effects of drugs			USUALLY able to describe the major side effects of drugs			SOMETIMES able to describe the major side effects of drugs			NEVER able to describe the major side effects of drugs		

Comment

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
Interactions	ALWAYS able to describe mechanisms of interactions			USUALLY able to describe mechanisms of interactions			SOMETIMES able to describe mechanisms of interactions			NEVER able to describe mechanisms of interactions		

Comment

## Problem Solving Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Analysing information

<b>Evaluates information</b>	Is ALWAYS able to evaluate information gathered	a	b	Is USUALLY able to evaluate information gathered	a	b	Is SOMETIMES able to evaluate information gathered	a	b	Is NEVER able to evaluate information gathered	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Problem identification</b>	ALWAYS able to identify problems	a	b	USUALLY able to identify problems	a	b	SOMETIMES able to identify problems	a	b	NEVER identifies problems	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Appraises options</b>	ALWAYS appraises options	a	b	USUALLY appraises options	a	b	SOMETIMES appraises options	a	b	NEVER appraises options	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Decision making</b>	ALWAYS demonstrates clear decisions making	a	b	USUALLY demonstrates clear decision making	a	b	SOMETIMES demonstrates clear decision making	a	b	NEVER demonstrates clear decision making	a	b
		c	d		c	d		c	d		c	d

Comment

## Problem Solving Competencies

**Competencies**

**Rating**

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

**Analysing information**

<b>Logical Approach</b>	ALWAYS demonstrates a logical process to problem solving	a	b	USUALLY demonstrates a logical process to problem solving	a	b	SOMETIMES demonstrates a logical process to problem solving	a	b	NEVER demonstrates a logical process to problem solving	a	b
		c	d		c	d		c	d		c	d

Comments

**Providing information**

<b>Provides accurate information</b>	ALWAYS provides accurate information	a	b	USUALLY provides accurate information	a	b	SOMETIMES provides accurate information	a	b	NEVER able to provide accurate information	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Provides relevant information</b>	Always provides relevant information	a	b	USUALLY provides relevant information	a	b	SOMETIMES provides relevant information	a	b	NEVER able to provide relevant information	a	b
		c	d		c	d		c	d		c	d

Comment



## Problem Solving Competencies

**Competencies**

**Rating**

a = Initial self assessment   b = Four month facilitation   c = Eight month facilitation   d = Twelve month self assessment

**Providing information**

<b>Provides timely information</b>	ALWAYS provides timely information	a	b	USUALLY provides timely information	a	b	SOMETIMES provides timely information	a	b	NEVER able to provide timely information	a	b
		c	d		c	d		c	d		c	d

Comment

**Follow up**

<b>Ensures resolution of problem</b>	ALWAYS ensures resolution of problem	a	b	USUALLY ensures resolution of problem	a	b	SOMETIMES ensures resolution of problem	a	b	NEVER able to ensure resolution of problem	a	b
		c	d		c	d		c	d		c	d

Comment

General comments on the assessment of problem-solving competencies

***Management and Organisation  
Competencies***

# Management and Organisation Competencies

## Clinical Governance

Clinical governance has been defined as:

*'A framework 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 excellence in clinical care can flourish.'*<sup>7</sup>

It requires an understanding of why incidents and errors happen. This encompasses the knowledge and skills to undertake the roles required and an ability to keep up to date with developments. It is about evaluating one's own practice, considering how it might be improved, and then changing practice, implementing the changes and finding out if the changes worked.

### Clinical governance issues

Clinical governance consists of a series of processes for improving quality and ensuring that professionals are accountable for their practice. These processes have been identified as continuing professional development, evidence-based practice, audit, dealing with poor performance, managing risk, monitoring clinical care and patient involvement.

These processes underpin all areas of practice. General level pharmacists should understand issues surrounding clinical governance and continuous quality improvement. These should be applied in their area of practice and also consider applicability in the wider context of patient care.

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<sup>7</sup> Clinical Governance: Quality in the new NHS. (HSC 1999/065) Department of Health, London, 1999.

## **Standard Operating Procedures**

Standard operating procedures (SOPs) are part of risk management and harm minimisation strategies. They are part of a process of assuring clinical governance. The Society requires that all pharmacists have written standard operating procedures in place by 1<sup>st</sup> January 2005. The SOPs should cover the dispensing process within individual pharmacies (hospital and community). SOPs will examine current practice and ensure that systems of operating within pharmacies are safe. They should allow for continual improvement of standards of service and provide evidence of commitment to protecting patients.

The areas of the dispensing process to be covered by standard operating procedures include:

- Prescription handling
- Assessment of the prescription for validity, safety and clinical appropriateness
- Interventions and problem solving
- Assembly and labelling of required medicine or product
- Accuracy checking procedure
- Transfer of medicine or product to the patient

General level pharmacists should be aware of and follow all the procedures in place in their organisation.

Use of procedures includes the ability to identify the need for a procedure, develop, implement and review them.

## **Working Environment**

The Code of Ethics describes the requirements for a suitable working environment that facilitates a safe system of work. There are also other national policies relevant to the work place e.g. Health and Safety, Control of Substances Hazardous to Health (COSHH), Hygiene, Infection Control, Controls Assurance.

## **Risk Management**

Pharmacists should record critical incidents such as dispensing errors and patient complaints in line with national and local policy. These documents may need to be

forwarded to the appropriate organization in the spirit of a fair blame culture e.g. National Patient Safety Agency.

## **Service Provision**

### **Quality of Service**

Ensuring a high quality service is central to the NHS Plan<sup>8</sup> and clinical governance. All healthcare professionals are expected to regularly review the quality of their services and make improvements where necessary. General level pharmacists should review their services to ensure they meet local and national standards e.g. Service specifications as described in the Medicines, Ethics & Practice. A Guide for Pharmacists, Service Level Agreements with the PCT or hospital.

### **Service Development**

General level pharmacists should have knowledge of national drivers for service development e.g. modernisation, as well as knowledge of local health delivery plans. New services or new ways of working should be identified in relation to local plans. PCTs will be looking to develop services to meet their local needs. New ideas should be referred to and discussed with the line manager with a view to implementation. When developing a new service, the sustainability and availability of the service must be ensured. Failure to do this will reduce the quality of patient care.

## **Budgeting and Reimbursement**

### **Service Reimbursement**

General level pharmacists are expected to have adequate knowledge to ensure appropriate and accurate reimbursement for services offered and items dispensed. The process by which reimbursement is claimed and services paid for will vary in the different sectors. For example, in the community, reimbursement for dispensed medicines is laid out in the drug tariff, in primary care reimbursement for services is likely to come from the PCT, in hospital pharmacy knowledge of the local formulary is essential.

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<sup>8</sup> Department of Health. The NHS Plan: A plan for investment, a plan for reform. London: HM Stationery Office; 2000



Some services are reimbursed locally i.e. from the PCT or hospital trust. Each service may have a unique reimbursement process. In community the new pharmacy contract will have an impact on local services. Essential services (e.g. dispensing and health promotion) and advanced services (e.g. medicine use review) will be paid for nationally. Supplementary services (e.g. minor ailments scheme, care home services, supervised administration schemes) will be paid for by the PCT according to local needs. Hospital budgets are entirely funded by local PCTs. Pharmacy services delivered by hospital-based pharmacists could be funded via the PCT.

### **Prescribing Budget**

Prescribing can greatly influence prescribing budget expenditure. General level pharmacists are expected to have an awareness of the overall allocation of funds for healthcare and its components. They should be able to describe where the prescribing budget fits in to the overall budget for healthcare and how prescribing affects the prescribing budget both in general medical services (via PCTs) and hospital services (e.g. formularies, specials, PACT data)

## **Organisations**

### **Organisational Structure**

General level pharmacists should have an awareness of the general structure that drives organisational policy (i.e. PCT, hospital trust, company). They are not expected to communicate daily with people but they need to know the organisational hierarchy. They should be able to refer queries appropriately.

### **Linked Organisations**

There are many organisations that are linked to the different sectors of pharmacy. These organisations often influence policy and affect service delivery. General level pharmacists should be able to describe the roles of the key linked organisations appropriate to their sector. For example organisations linked to hospital pharmacy might include UKCPA, the Guild of Healthcare Pharmacist; community pharmacy might include the LPC, NPA, PSNC; and primary care pharmacy might include the LPC and the NPC.

In addition general level pharmacists should be able to describe the key organisations involved in continuing professional development, e.g. CPPE, CPP.

### **Pharmaceutical Industry**

General level pharmacists should work within national and local policies on working with the pharmaceutical industry. This includes NHS policy, Association of the British Pharmaceutical Industry policies, and local organisation or trust policies.

## **Training**

### **Staff**

Pharmacists need to ensure that all staff for which they are responsible are working within national and employing organisational requirements. The Royal Pharmaceutical Society is to introduce minimum competence requirements next year for dispensing and pharmacy assistants involved in providing pharmacy services. The policy covers dispensing/pharmacy assistants working under the supervision of a pharmacist in the community, hospital or other pharmacy sector. In hospital pharmacy it may also include other staff who may not necessarily be based in the dispensary e.g. assistant technical officers working in a manufacturing unit or staff who put stock away, etc. In addition, the Code of Ethics states that all staff whose work regularly includes the sale of pharmacy medicines must be competent. They should have undertaken, or be undertaking an accredited medicines counter assistant course.

Dispensing and pharmacy assistants are working under the supervision of the pharmacist when undertaking the tasks associated with their job. If staff are working under the supervision of a general level pharmacist, the pharmacists must ensure they are competent, and make arrangements for training where necessary.

### **Other healthcare professionals**

Other healthcare professionals may need training in the provision of medicines to the public. A general level pharmacist may identify training needs in the course of their interactions with such staff. For example ward staff and appropriate storage of medicines; staff working in care homes and domiciliary care workers administering medicines; prescription clerks issuing repeat prescriptions. These training needs

could be met by the general level pharmacist. This does not necessarily entail organising a training event, it could be an opportunistic chat or provision of an aide memoir e.g. how to write prescriptions for controlled drugs.

## **Staff Management**

This competency is only relevant if the pharmacist has direct managerial responsibility for other staff.

### **Performance management**

The purpose of the staff appraisal is to discuss achievements, expectations and outcomes related to work content, contribution, development and aspirations in relation to the individuals own role, and the strategic plans of the organisations. The appraisal process should realise potential, monitor performance and recognise contribution.

The key to appraisal is the opportunity to discuss openly, issues that are important to both parties.

The appraisal can be carried out against last year's objectives, using work activities, knowledge, skills and experience or the job description. The outcomes of the appraisal will relate directly to the expected level of performance, responsibility and competence for the job.

The appraisal should be carried out in a fair and equitable way with due consideration paid to the individual's needs in relation to the process and outcomes of appraisal. Appraisals should be carried out at least annually.

### **Staff development**

Staff should be supported to realise their potential in relation to organisational strategy and personal development. Development objectives and aspirations should be identified and reassessed during regular appraisals.

## **Employment Issues**

General level pharmacists are expected to have awareness of employment issues, including employment legislation, whether directly involved in employing staff or not. Such issues include interviewing skills, statutory rights (e.g. annual leave, maternity leave, minimum wage, sick pay), disciplinary procedures etc. Such issues must be considered when managing staff.

## **Procurement**

Not all general level pharmacists will be sourcing pharmaceuticals themselves, but they will still need to understand how products are sourced.

## **Pharmaceutical**

Most medicines are readily available from the wholesaler. However there may be occasions when special products need to be sourced. This may include specially manufactured products such as griseofulvin suspension; unlicensed products; foreign products; products only available from the manufacturer e.g. NeoRecormon; hospital only products e.g. Roaccutane or products only available in the community. Pharmacists should be aware of such products and where to source them, or be able to suggest suitable alternatives.

## **Supply problems**

Resolution of supply problems does not just include obtaining the product. In some cases this is not possible. In this situation resolution of the supply problem would entail arranging a suitable alternative product for the patient.

## **Stock Management**

Well managed stock levels reduce the possibility of owing the patient part of a prescription, yet minimise excess stock and the risk of products on the shelf reaching their expiry date.

## **Cost effectiveness**

When purchasing and dispensing stock, consideration must be given to its cost effectiveness (e.g. dispensing generics, buying in bulk). This is usually reflected in local hospital or PCT formularies. However patient care must not be compromised.

Brand substitution for those therapeutic agents for which variations in bioavailability may affect clinical outcome should be carefully considered. These agents include:

- ❑ Carbamazepine
- ❑ Phenytoin
- ❑ Sodium valproate
- ❑ Theophylline
- ❑ Aminophylline
- ❑ Diltiazem (long acting)
- ❑ Nifedipine
- ❑ Lithium
- ❑ Cyclosporin



## Management and Organisation Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Clinical Governance

<b>Clinical Governance Issues</b>	Can ALWAYS demonstrate the application of clinical governance issues	a	b	Can USUALLY demonstrate the application of clinical governance issues	a	b	Can SOMETIMES demonstrate the application of clinical governance issues	a	b	NEVER demonstrates the application of clinical governance issues	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Standard Operating Procedures</b>	ALWAYS uses relevant and up to date procedures for practice	a	b	USUALLY uses relevant and up to date procedures for practice	a	b	SOMETIMES uses relevant and up to date procedures for practice	a	b	NEVER uses relevant and up to date procedures for practice	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Working Environment</b>	ALWAYS implements legal and professional requirements for a safe system of work	a	b	USUALLY implements legal and professional requirements for a safe system of work	a	b	SOMETIMES implements legal and professional requirements for a safe system of work	a	b	NEVER implements legal and professional requirements for a safe system of work	a	b
		c	d		c	d		c	d		c	d

Comment



## Management and Organisation Competencies

Competencies

Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

### Clinical Governance

<b>Risk Management</b>	ALWAYS documents critical incidents	a	b	USUALLY documents critical incidents	a	b	SOMETIMES documents critical incidents	a	b	NEVER documents critical incidents	a	b
		c	d		c	d		c	d		c	d
	ALWAYS forwards critical incident reports to the appropriate organisations	a	b	USUALLY forwards critical incident reports to the appropriate organisations	a	b	SOMETIMES forwards critical incident reports to the appropriate organisations	a	b	NEVER forwards critical incident reports to the appropriate organisations	a	b
		c	d		c	d		c	d		c	d

Comment

### Service Provision

<b>Quality of Service</b>	ALWAYS looks to improve the quality if the services offered	a	b	USUALLY looks to improve the quality if the services offered	a	b	SOMETIMES looks to improve the quality if the services offered	a	b	NEVER looks to improve the quality if the services offered	a	b
		c	d		c	d		c	d		c	d

Comment

## Management and Organisation Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Service Provision

<b>Service Development</b>	Can ALWAYS describe the key drivers for national and local service development	a	b	Can USUALLY describe the key drivers for national and local service development	a	b	Can SOMETIMES describe the key drivers for national and local service development	a	b	Can NEVER describe the key drivers for national and local service development	a	b
		c	d		c	d		c	d		c	d
	ALWAYS identifies and refers the need for new services	a	b	USUALLY identifies and refers the need for new services	a	b	SOMETIMES identifies and refers the need for new services	a	b	NEVER identifies or refers the need for new services	a	b
		c	d		c	d		c	d		c	d

Comment

#### Budget setting and reimbursement

<b>Service Reimbursement</b>	ALWAYS uses relevant reference sources to ensure appropriate and accurate reimbursement	a	b	USUALLY uses relevant reference sources to ensure appropriate and accurate reimbursement	a	b	SOMETIMES uses relevant reference sources to ensure appropriate and accurate reimbursement	a	b	NEVER uses relevant reference sources to ensure appropriate and accurate reimbursement	a	b
		c	d		c	d		c	d		c	d
	ALWAYS claims reimbursement appropriately for services provided	a	b	USUALLY claims reimbursement appropriately for services provided	a	b	SOMETIMES claims reimbursement appropriately for services provided	a	b	NEVER claims reimbursement appropriately for services provided	a	b
		c	d		c	d		c	d		c	d

Commnet



## Management and Organisation Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Budget setting and reimbursement

<b>Prescribing budgets</b>	Can ALWAYS interpret how prescribing affects prescribing budgets	a	b	Can USUALLY interpret how prescribing affects prescribing budgets	a	b	Can SOMETIMES interpret how prescribing affects prescribing budgets	a	b	CANNOT interpret how prescribing affects prescribing budgets	a	b
		c	d		c	d		c	d		c	d

Comment

#### Organisations

<b>Organisational structure</b>	Can ALWAYS describe the structure of employing organisation	a	b	Can USUALLY describe the structure of employing organisation	a	b	Can SOMETIMES describe the structure of employing organisation	a	b	CANNOT describe the structure of employing organisation	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Linked Organisation</b>	Can ALWAYS describe the key organisations that affect service delivery	a	b	Can USUALLY describe the key organisations that affect service delivery	a	b	Can SOMETIMES describe the key organisations that affect service delivery	a	b	CANNOT describe the key organisations that affect service delivery	a	b
		c	d		c	d		c	d		c	d

Comment



## Management and Organisation Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

### Organisations

Pharmaceutical Industry	ALWAYS follows local and national guidance when working with the pharmaceutical industry	a	b	USUALLY follows local and national guidance when working with the pharmaceutical industry	a	b	SOMETIMES follows local and national guidance when working with the pharmaceutical industry	a	b	NEVER follows local and national guidance when working with the pharmaceutical industry	a	b
		c	d		c	d		c	d		c	d

Comment

### Training

Staff	ALWAYS ensures staff are competent to undertake the tasks allocated to them	a	b	USUALLY ensures staff are competent to undertake the tasks allocated to them	a	b	SOMETIMES ensures staff are competent to undertake the tasks allocated to them	a	b	NEVER ensures staff are competent to undertake the tasks allocated to them	a	b
		c	d		c	d		c	d		c	d

Comment

Other healthcare professionals	Is ALWAYS active in training other healthcare professionals	a	b	Is USUALLY active in training other healthcare professionals	a	b	Is SOMETIMES active in training other healthcare professionals	a	b	Is NEVER active in training other healthcare professionals	a	b
		c	d		c	d		c	d		c	d

Comment



## Management and Organisation Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Staff Management

<b>Performance management</b>	ALWAYS carries out staff appraisals on a regular basis	a	b	USUALLY carries out staff appraisals on a regular basis	a	b	SOMETIMES carries out staff appraisals on a regular basis	a	b	NEVER carries out staff appraisals	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Staff development</b>	ALWAYS supports staff in their development	a	b	USUALLY supports staff in their development	a	b	SOMETIMES supports staff in their development	a	b	NEVER supports staff in their development	a	b
		c	d		c	d		c	d		c	d

Comment

<b>Employment issues</b>	ALWAYS correctly applies employment issues	a	b	USUALLY correctly applies employment issues	a	b	SOMETIMES correctly applies employment issues	a	b	NEVER correctly applies employment issues	a	b
		c	d		c	d		c	d		c	d

Comment

## Management and Organisation Competencies

### Competencies

### Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

#### Procurement

<b>Pharmaceutical</b>	Can ALWAYS describe how pharmaceuticals can be sourced	a	b	Can USUALLY describe how pharmaceuticals can be sourced	a	b	Can SOMETIMES describe how pharmaceuticals can be sourced	a	b	Can NEVER describe how pharmaceuticals can be sourced	a	b
		c	d		c	d		c	d		c	d
	Can ALWAYS source pharmaceuticals in a timely manner	a	b	Can USUALLY source pharmaceuticals in a timely manner	a	b	Can SOMETIMES source pharmaceuticals in a timely manner	a	b	Can NEVER source pharmaceuticals in a timely manner	a	b
		c	d		c	d		c	d		c	d

#### Comment

<b>Supply problems</b>	Supply problems are ALWAYS resolved promptly	a	b	Supply problems are USUALLY resolved promptly	a	b	Supply problems are SOMETIMES resolved promptly	a	b	Supply problems are NEVER resolved promptly	a	b
		c	d		c	d		c	d		c	d

#### Comment

<b>Stock management</b>	ALWAYS ensures stock is managed	a	b	USUALLY ensures stock is managed	a	b	SOMETIMES ensures stock is managed	a	b	NEVER manages stock	a	b
		c	d		c	d		c	d		c	d

#### Comment



## Management and Organisation Competencies

Competencies

Rating

a = Initial self assessment b = Four month facilitation c = Eight month facilitation d = Twelve month self assessment

### Procurement

Competency	Description	a	b	Description	a	b	Description	a	b	Description	a	b
		c	d		c	d		c	d		c	d
<b>Cost effectiveness</b>	ALWAYS ensures stock purchased maximises cost effectiveness			USUALLY ensures stock purchased maximises cost effectiveness			SOMETIMES ensures stock purchased maximises cost effectiveness			NEVER ensures stock purchased maximises cost effectiveness		

General comments

# Appendices

## Appendix 1

### Competency framework improves the clinical practice of junior hospital pharmacists: interim results of the south of England trial

Submitted to BPC 2003; see Int J Pharm Pract 2003; 11(suppl):R91

#### Introduction

Inconsistency in the practice of clinical pharmacy at a junior level encouraged McRobbie and co-workers to develop a competency framework to facilitate practitioner development and assessment.<sup>1</sup> A pilot study in a limited number of trusts across London and the South East provided evidence of benefit in terms of both the individual and the organisation.<sup>2</sup> As a consequence, the study group decided to proceed to a large, controlled study to determine whether the framework could improve the clinical practice of junior hospital pharmacists.

#### Method

Twenty-two acute NHS trusts in the south of England were recruited into active (n=13) or control (n=9) sites. Within each trust, all junior grade pharmacists (practising at level equivalent to B-grade) were enrolled into the trial (active sites n= 72; control sites n=30). Junior grade pharmacists (“tutees”) and senior supervisors (“tutors”) in the active sites used the competency framework for practice development. The framework consists of 25 patient-related competencies assessed on a four-point frequency scale.<sup>1</sup> Tutees and tutors in the control sites did not have access to the competency framework, and measures were taken to ensure these trusts remained isolated from the assessment outcomes. All pharmacists were assessed at baseline (t=0), 3 months, 6 months and 12 months. A selection of assessments was undertaken using independent assessors to evaluate the reliability of the judgements.

#### Results

An interim longitudinal analysis of 6 months’ data (month-12 data not yet entered) showed pharmacists in the active group to have greater competency progression compared to the control group. (Wilcoxon signed rank, Table 1). Using a computed competency score for each recruit, aggregated over the full range of patient competencies, control and active pharmacists were compared using a Kaplan-Meier plot. Event status was defined as the achievement of competence, detected by the attainment of a threshold score. A significant difference existed between the groups (log rank 10.77, p=0.001).

## Discussion

This analysis demonstrates that tutees in the active sites underwent significant competency improvement in 24 of the 25 patient-related competencies. The competency that remained unchanged concerned prescription legality and tutees achieved a satisfactory rating for this at baseline (that is, further improvement was not possible). By contrast, control candidates showed progression in only 7 of the 25 competencies. The Kaplan-Meier method, using an aggregate competency score at different time points, revealed a significant difference in favour of the active sites in terms of the proportion of tutees achieving the desired competency score. Month-12 data has been collected and will be included in further analysis. At this stage, the study indicates that introduction of a competency framework improves clinical practice among junior hospital pharmacists.

**Table 1:** Within-group comparison of Active and Control groups at 6 months over 25 patient related competencies. Shaded areas are non-significant at  $p=0.05$  level.

Competency	Control		Active	
	Z	Exact sig.	Z	Exact sig.
Relevant patient background	1.508	.234	3.766	<0.001
Drug history taking	1.582	.156	3.956	<0.001
Drug-drug interactions identified	2.543	.014	4.116	<0.001
Drug-drug interactions prioritized	2.437	.018	4.297	<0.001
Drug-drug appropriate action taken	2.230	.036	4.341	<0.001
Drug-patient interactions identified	1.588	.152	4.093	<0.001
Drug-patient interactions prioritized	1.461	.195	4.204	<0.001
Drug-patient appropriate action taken	1.150	.332	3.603	<0.001
Drug-disease interactions identified	1.611	.180	4.155	<0.001
Drug-disease interactions prioritized	1.811	.113	4.549	<0.001
Drug-disease appropriate action taken	1.811	.113	4.304	<0.001
Calculation of appropriate dose	.711	.628	3.840	<0.001
Selection of dosing regimen	.632	.754	4.933	<0.001
Selection of formulation	.047	1.000	3.697	<0.001
Prescription unambiguous	2.121	.070	2.408	<0.001
Prescription legal	1.633	.219	2.001	.059
Identify pharmaceutical problems	2.496	.020	3.829	<0.001
Prioritize pharmaceutical problems	2.714	.008	4.556	<0.001
Use of guidelines	2.803	.004	4.083	<0.001
Resolution of pharmaceutical problems	2.333	.039	4.282	<0.001
Consultation and referral	1.190	.344	4.120	<0.001
Need for information identified	1.999	.072	4.901	<0.001
Accurate/reliable communication	1.265	.359	4.627	<0.001
Appropriate information provided	1.000	.625	3.715	<0.001
Assessment of outcomes	1.414	.289	4.415	<0.001



## Key Points

- A competency framework for clinical pharmacy has been composed to facilitate the development and assessment of junior pharmacists
- Pharmacists exposed to the framework and formative assessment (active sites) develop their practice to a significantly greater extent than those not so exposed (control sites).
- The proportion of pharmacists achieving an aggregate designation of clinical competence is higher in the active group at all time points studied so far.

## References

1. McRobbie D, Webb DG, Bates I, Wright J, Davies JG. Assessment of clinical competence: Designing a competence grid for junior pharmacists. *Pharmacy Education* 2001; **1**: 67-76.
2. Goldsmith GM, Bates IP, Davies G, McRobbie D, Webb D. A pilot study to evaluate clinical competence in junior grade pharmacy practitioners. *Pharm World Sci* 2003; **25**: A13-A14.

## Appendix 2

### Guidance on how the framework was used

#### Standard Setting- prior to the assessment

From the controlled study, what was found useful was a pre-defined standard that the pharmacist could be compared to. This standard was set locally by the relevant staff but the tables below give an example on how this could be used with the framework.

Competency	Never	Sometimes	Usually	Always
Relevant Patient Background			*	
Drug History			*	
Drug-drug interactions				
Identified				*
Prioritised				*
Appropriate action				*
Drug-patient interactions				
Identified			*	
Prioritised				*
Appropriate action				*
Drug-disease interactions				
Identified			*	
Prioritised				*
Appropriate action				*
Calculation of appropriate dose				*
Selection of dosing regimen				*
Selection of formulation and concen <sup>n</sup>				*
The prescription is unambiguous				*
The prescription is legal				*
Identification of pharmaceutical problems			*	
Prioritisation of pharmaceutical problems			*	
Use of guidelines				*
Resolution of pharmaceutical problems			*	
Consultation or referral			*	

Initial standard set (\*), which may be specific to an individual ward/directorate or for the entire trust/hospital. During the study, both options were used successfully on different sites. The standard set can be used as a goal for which the individual can attain to. It is this standard that the pharmacist will be assessed against and will form the basis of the feedback (see Performance measurement and improvement tool)

#### Performance measurement tool - Initial baseline assessment (#)

Competency	Never	Sometimes	Usually	Always
Relevant Patient Background		#	*	
Drug History		#	*	
Drug-drug interactions				
Identified			#	*
Prioritised			#	*
Appropriate action			#	*
Drug-patient interactions				
Identified		#	*	
Prioritised		#		*
Appropriate action		#		*
Drug-disease interactions				
Identified		#	*	
Prioritised			#	*
Appropriate action			#	*
Calculation of appropriate dose			#	*
Selection of dosing regimen		#		*
Selection of formulation and concen <sup>n</sup>		#		*
The prescription is unambiguous			#	*
The prescription is legal			#	*
Identification of pharmaceutical problems	#		*	
Prioritisation of pharmaceutical problems	#		*	
Use of guidelines	#			*
Resolution of pharmaceutical problems	#		*	
Consultation or referral		#	*	

## Performance improvement tool

Competency	Never	Sometimes	Usually	Always
Relevant Patient Background		#	* ●	
Drug History		#	* ●	
Drug-drug interactions				
Identified			# ●	*
Prioritised			#	* ●
Appropriate action			#	* ●
Drug-patient interactions				
Identified		#	* ●	
Prioritised		#	●	*
Appropriate action		#	●	*
Drug-disease interactions				
Identified		#	* ●	
Prioritised			#	* ●
Appropriate action			#	* ●
Calculation of appropriate dose			#	* ●
Selection of dosing regimen		#	●	*
Selection of formulation and concen <sup>n</sup>		#		* ●
The prescription is unambiguous			#	* ●
The prescription is legal			#	* ●
Identification of pharmaceutical problems	#	●	*	
Prioritisation of pharmaceutical problems	#		* ●	
Use of guidelines	#			* ●
Resolution of pharmaceutical problems	#		*	
Consultation or referral		#	*	

Improvement tool after a period of training/development (●) from their baseline assessment (#). This indicates that on certain competencies, the individual has met the requirement and can then concentrate on areas that need developing in order to demonstrate the competency level expected.

## Appendix 3

# 12 month median results - Active

Competency	Never	Sometimes	Usually	Always
Relevant Patient Background			*	
Drug History			*	
Drug-drug interactions				
Identified			*	
Prioritised			*	
Appropriate action				*
Drug-patient interactions				
Identified			*	
Prioritised			*	
Appropriate action			*	
Drug-disease interactions				
Identified			*	
Prioritised			*	
Appropriate action			*	
Calculation of appropriate dose				*
Selection of dosing regimen				*
Selection of formulation and concen <sup>n</sup>				*
The prescription is unambiguous				*
The prescription is legal				*
Identification of pharmaceutical problems			*	
Prioritisation of pharmaceutical problems			*	
Use of guidelines			*	
Resolution of pharmaceutical problems			*	
Consultation or referral			*	
Need for information is identified			*	
Accurate and reliable drug information is communicated				*
Provision of written information			*	
Assessing outcomes of contributions			*	

The above table shows the Median attainment reached (\*) at 12 month by the active group for each of the individual competencies. This can be used as a guidance of the expected level of attainment after 12 months usage with the grids.

## Appendix 4

# Acknowledgements

### Competency Project Group

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Hammersmith Hospitals NHS Trust	Guys and St Thomas' Hospital NHS Trust
Chelsea & Westminster Healthcare NHS Trust	Epsom & St Helier NHS Trust
Mayday Healthcare NHS Trust	Homerton University Hospital NHS Trust
Northwick Park Hospital NHS Trust	Kingston Hospital NHS Trust
Oxford Radcliffe Hospitals NHS Trust	Northampton General Hospital NHS Trust
Royal Free Hampstead NHS Trust	North Middlesex University Hospital NHS Trust
St George's Healthcare NHS Trust	St Mary's NHS Trust
Southampton University Hospitals NHS Trust	West Middlesex University Hospital NHS Trust
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Southend Hospital NHS Trust	

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