



## Review Sheet

Last Reviewed  
27 Mar '20Last Amended  
27 Mar '20Next Planned Review in 12 months, or  
sooner as required.

Business impact



MEDIUM IMPACT

Changes are important, but urgent implementation is not required, incorporate into your existing workflow.

Reason for this review

Scheduled review

Were changes made?

Yes

Summary:

This policy details the importance of accurate ordering and receipt of medication within the service and forms the framework for effective and efficient medication reconciliation. It has been reviewed, with minor changes as well as having some further emphasis placed in the procedure section on accurate stock balance. The references have been reviewed and remain current to the content of the policy. A further suggestion has also been added to the policy in the 'Outstanding' section.

Relevant legislation:

- The Care Act 2014
- The Controlled Drugs (Supervision of Management and Use) Regulations 2013
- The Health and Social Care Act 2008 (Regulated Activities) Regulations 2014
- Medicines Act 1968
- The Human Medicines Regulations 2012
- Misuse of Drugs Act 1971
- The Misuse of Drugs (Safe Custody) Regulations 1973
- The Misuse of Drugs and Misuse of Drugs (Safe Custody) (Amendment) Regulations 2007

Underpinning knowledge - What have we used to ensure that the policy is current:

- Author: Royal pharmaceutical society, (2018), *Professional guidance on the safe and secure handling of medicines*. [Online] Available from: <https://www.rpharms.com/recognition/setting-professional-standards/safe-and-secure-handling-of-medicines/professional-guidance-on-the-safe-and-secure-handling-of-medicines> [Accessed: 27/3/2020]
- Author: NICE, (2014), *Managing medicines in care homes*. [Online] Available from: <https://www.nice.org.uk/guidance/sc1> [Accessed: 27/3/2020]
- Author: CQC, (2019), *Medicines reconciliation and medication review*. [Online] Available from: <https://www.cqc.org.uk/guidance-providers/adult-social-care/medicines-reconciliation-medication-review> [Accessed: 27/3/2020]

Suggested action:

- Encourage sharing the policy through the use of the QCS App



## 1. Purpose

**1.1** To ensure that Service Users receive their medications correctly and in a timely manner and to reduce the unnecessary waste of medication. This policy should be read with the Overarching Medication Policy and Procedure and be used alongside any locally required policies and procedures.

**1.2** To support HWCGRS Care (T/A Segal Gardens) in meeting the following Key Lines of Enquiry:

Key Question	Key Lines of Enquiry
EFFECTIVE	E4: How well do staff, teams and services within and across organisations work together to deliver effective care, support and treatment?
SAFE	S4: How does the provider ensure the proper and safe use of medicines?
WELL-LED	W2: Does the governance framework ensure that responsibilities are clear and that quality performance, risks and regulatory requirements are understood and managed?

**1.3** To meet the legal requirements of the regulated activities that HWCGRS Care (T/A Segal Gardens) is registered to provide:

- | The Care Act 2014
- | The Controlled Drugs (Supervision of Management and Use) Regulations 2013
- | The Health and Social Care Act 2008 (Regulated Activities) Regulations 2014
- | Medicines Act 1968
- | The Human Medicines Regulations 2012
- | Misuse of Drugs Act 1971
- | The Misuse of Drugs (Safe Custody) Regulations 1973
- | The Misuse of Drugs and Misuse of Drugs (Safe Custody) (Amendment) Regulations 2007



## 2. Scope

**2.1** The following roles may be affected by this policy:

- | Registered Manager
- | Other management
- | Care staff

**2.2** The following Service Users may be affected by this policy:

- | Residential Service Users

**2.3** The following stakeholders may be affected by this policy:

- | External health professionals
- | NHS



## 3. Objectives

**3.1** Procedures are in place for the effective and safe reconciliation, ordering, receipt and review of Service User medication.



## 4. Policy

4.1 HWCGS Care (T/A Segal Gardens) understands the importance of having accurate and up-to-date information about a Service User's medication at all times and will ensure that all staff responsible for medication management understand the procedures that are in place to make sure the process is safe and effective. HWCGS Care (T/A Segal Gardens) uses a reputable pharmacy provider and raises any concerns about the quality of service provision in a timely manner, to reduce any impact on the Service User. Only staff trained, competent and skilled to do so will be responsible for the ordering and receipt of medication. Responsibilities will be clear in relation to medication reconciliation, ordering and receipt when partnership working with both Service Users and other organisations.



## 5. Procedure

### 5.1 Medicines Reconciliation

Medicines must be reconciled within 48 hours at the transfer of care including:

- | Admission into HWCGS Care (T/A Segal Gardens)
- | Hospital admission (planned and emergency)
- | Hospital discharge
- | Transfer within HWCGS Care (T/A Segal Gardens), e.g. from one unit to another
- | Discharge from HWCGS Care (T/A Segal Gardens) to the community

If this cannot be achieved, the reason must be recorded.

Service User consent is vital in all aspects of medicines reconciliation and staff will refer to the Consent to Examination or Treatment Policy and Procedure at HWCGS Care (T/A Segal Gardens) for further details.

### 5.2 Information Necessary for Medicines Reconciliation

Below is a list of the information that must be made available to support effective medicine reconciliation:

- | Service User details, including full name, date of birth, NHS number, address and weight
- | GP details, current GP and previous GP, if recently changed
- | Medical summary from the GP surgery
- | Details of relevant contacts defined by the Service User/carers, e.g. family members, consultant, regular pharmacist, specialist nurse
- | Any known allergies and reactions to medicines or ingredients and the nature of the reaction experienced if known
- | Current list of medicines, including name, strength, form, dose, timing and frequency, route of administration, and indication. This must include both prescribed medicines and those purchased over the counter
- | Recent changes to medicines, including medicines started, stopped or dosage changed, and the reason for the change
- | Date the last dose of any medicines was taken if given less often than once a day (includes 'when required', weekly and monthly medicines)
- | Other information, for example, when the medicine will be reviewed or monitored
- | Any support the Service User needs to carry on taking the medicine, e.g. compliance aids
- | The consistency of thickened fluids needed for those with swallowing difficulties

Where there are concerns that all known information is not available, staff must discuss this with Mr Damian Cummings Gillian Gilmore or a delegated other in the first instance.

### 5.3 Roles and Responsibilities with Medicines Reconciliation

HWCGS Care (T/A Segal Gardens) understands that medicines reconciliation can be carried out by any healthcare professional as long as they are competent to undertake reconciliation and have the skills and information they need to carry out the task. HWCGS Care (T/A Segal Gardens) will ensure that the following people are involved in medicine reconciliation:

- | The Service User and/or their family members/carer
- | A pharmacist, other health and social care practitioners involved in managing medicines for the Service

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**User**

Mr Damian Cummings Gillian Gilmore will agree who will be responsible for completing the medicines reconciliation (name, job title). This includes ensuring that at least 2 members of the staff have the training and skills to order medicines, although ordering can be done by 1 member of staff. Those responsible for a Service User's assessment for transfer into HWCGS Care (T/A Segal Gardens) will coordinate an accurate listing of all the Service User's medicines as part of a full needs assessment and Care Plan and consider the resources needed for this to occur in a timely manner.

HWCGS Care (T/A Segal Gardens) will retain responsibility for ordering medicines from the GP Practice and will not delegate this to Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU. Staff responsible will document the medicine reconciliation to ensure that there is a clear audit trail.

**5.4 Ordering**

A medication ordering system for Service Users will ensure that the correct medicines are supplied in a timely manner to meet their needs with minimum waste. All staff, including the wider multidisciplinary team, have their part to play to ensure a smooth process and, ultimately, the best care for Service Users. Good communication and co-operation between GP Practices, pharmacies and HWCGS Care (T/A Segal Gardens) is essential.

The following principles will be followed to ensure that an effective ordering system is in place:

**Ordering Process**

- | HWCGS Care (T/A Segal Gardens) will have a designated, named person(s) and a deputy who process the regular repeat medication order
- | Protected time will be available to order medicines and check medicines delivered to HWCGS Care (T/A Segal Gardens)
- | If a Service User is refusing/having difficulties with swallowing medication, this must be highlighted to the prescriber in advance of re-ordering
- | Medication will be ordered at 28-day intervals with sufficient time available for prescriptions to be issued, checked, dispensed and delivered
- | Staff must be accurate on stock levels of medication and where it applies, this will be recorded in the carried over section on the new MAR
- | Requests for repeat medication will be submitted using the repeat medication format and records maintained of what has been ordered
- | Time must be made available for HWCGS Care (T/A Segal Gardens) to check completed prescriptions from the GP for accuracy, before sending to Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU for dispensing
- | Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU must be alerted to any medication that has been discontinued so this can be removed from the MAR. This may include requesting the GP to complete the medication discontinuation record on the MAR /Pharmacy copy

**Receipt of Medication**

- | A suitably competent and trained member of staff must check that medicines received are correct by comparing them to a copy of the Service User's current prescription
- | If the medicines do not match the copy of the prescription, staff must not administer and must contact the supplying pharmacy immediately to rectify the mistake
- | Trained staff must record on the individual Service User's MAR the quantity received, date of receipt and the initials of the person receiving the medicine. This must be double checked and signed by a second person who is suitably trained
- | Where a further supply or balance is received, staff must record this in the same way
- | Where paper MARs are in use, if a printed MAR is not received with the medicines, staff must make a written entry on the Service User's existing MAR or a new MAR. This must only be completed by trained members of staff
- | Accurate balances will be kept of carried over stock and newly received medication and this will be evidenced within the MAR

**Delay Management**

- | If a medication supply for a Service User does not arrive as expected, always check with Allied

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Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU whether they have received the prescription, especially when the GP Practice has faxed the prescription in an emergency

- | Communicate any information about expected prescriptions or delays to supply at each shift change
- | Let other staff know when you have contacted the GP Practice or Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU about a prescription query so that multiple calls are not made about the same query
- | Record the action taken and, where it applies, complete an accident/incident record. Staff should refer to the Medication Errors and Near Misses policy and procedure for further details

**Medication Waste Reduction**

- | Under no circumstances will Service Users' 'no longer required' medications be used to supply other Service Users
- | Do not routinely clear drug cupboards at the end of the month and order new stock
- | Do not dispose of a medicine at the end of a cycle unless it has been dispensed in a Monitored Dosage System, has been discontinued by the prescriber, or has reached the manufacturer's expiry (see packaging and be aware of any special instructions, e.g. "use within xx days of opening")
- | Check quantities remaining and if there are enough left for the next 28 days before reordering
- | Do not reorder 'when required' or topical medication if there is an adequate supply. Ask the GP to adjust the quantity supplied if there is an overstock
- | Carry forward quantities of any medicines that can still be used, for example, 'when required' or in original packs. An example would be a box of 5 ampoules of Hydroxocobalamin injection prescribed for 3-monthly injections where the box should last for 15 months.
- | Record all 'carried forwards' on the MAR for the next 28-day cycle

**5.5 Changing a Pharmacy Supplier**

- | Agree the change of date with the new pharmacy and each GP Practice involved
- | Agree the procedure for requesting repeat prescription orders and any documentation with the pharmacy or the GP Practices
- | Arrange for prescription repeats a few weeks prior to commencement of the new supply
- | Ensure that current medication stocks are used before reordering
- | Dispose of any medication from the previous supplier that is no longer required by Service Users before the changeover date. Service User consent to medication disposal must be gained before doing so

**5.6 Urgent Prescriptions**

Exceptions to the regular ordering process may include orders for acute medication, such as:

- | When a Service User is acutely unwell
- | If the Service User has recently moved into HWCGRS Care (T/A Segal Gardens)
- | When a Service User has been discharged back from hospital and does not have a sufficient supply of medication

It is good practice for acute prescriptions to be dispensed by Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU. This allows checks to be made against current medication for interactions. In normal circumstances, an original prescription will be obtained.

Electronic copies of prescriptions will only be necessary in emergency situations, such as to provide written confirmation of an urgent supply when an original prescription cannot be supplied to Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU in a timely manner.

**5.7 General Best Practice**

- | 'PRN' medication should be dispensed in original packs
- | MDS packs only have an 8-week shelf-life and will be discarded after this time
- | Creams and lotions can be used until the manufacturer's expiry date and so do not need to be reordered automatically every month. (\*N.B. Eye drops, eye ointments and some nasal products will be discarded 28-days after opening - check the pack)
- | Liquid medicines can usually be used up to the manufacturer's expiry date but some have short expiry

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dates, e.g. antibiotics (where reconstituted just prior to supply), Oramorph and some other liquids (shortened shelf life once opened)

- | Always consult the label and do not use the medicine past its expiry date or “use within xx days of opening” date
- | Ask the GP to add extra instructions to short term prescriptions, e.g. ‘acute’ or ‘review in 4 weeks’, so that they are not reordered in error
- | Ask the GP to remove any discontinued medicines from the repeat portion of the prescription. This helps prevent discontinued medicines being ordered in error
- | Ask Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU to remove discontinued medicines from the MAR. This also helps prevent discontinued medicines being ordered in error
- | If a medicine is ordered in error, contact Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU as soon as possible to advise them not to supply. Medicines returned to Allied Pharmacy, Unit 18, Bold Industrial Park, Neills road, ST Helens, WA9 4TU cannot be re-used in any circumstance and are destroyed

**5.8 Medication Review**

- | HWCGRS Care (T/A Segal Gardens) will agree how often each Service User will be offered a multidisciplinary medication review. This will be based on the health and care needs of the Service User, but the Service User's safety will be the most important factor when deciding how often to do the review
- | The frequency of planned medication reviews will be recorded in the Service User's Care Plan. The interval between medication reviews will be no more than one year and best practice states a review is conducted whenever a medicine is started, stopped or changed and when a Service User moves between care settings
- | The roles and responsibilities of each member of the team and how they work together will be carefully considered and agreed locally

**5.9 HWCGRS Care (T/A Segal Gardens) Will Discuss and Review the Following During a Medication Review:**

- | The purpose of the medication review
- | What the Service User (and/or their family members or carers, as appropriate and in line with the Service User's wishes) thinks about the medicines and how much they understand
- | The Service User's (and/or their family members' or carers', as appropriate and in line with the Service User's wishes) concerns and questions about or problems with the medicines
- | All prescribed, over-the-counter and complementary medicines that the Service User is taking or using, and what these are for
- | How safe the medicines are, how well they work, how appropriate they are, and whether their use is in line with national guidance
- | Any monitoring tests that are needed
- | Any problems the Service User has with the medicines, such as side effects or reactions, taking the medicines themselves (for example, using an inhaler) and difficulty swallowing
- | Helping the Service User to take or use their medicines as prescribed (medicines adherence)
- | Any more information or support that the Service User (and/or their family members or carers) may need





## 6. Definitions

### 6.1 MAR

- | Medication Administration Record

### 6.2 Medication Review

- | Medication review has been defined as a structured, critical examination of a Service User's medicines with the objective of reaching an agreement with the Service User about treatment, optimising the impact of medicines, minimising the number of medication-related problems and reducing waste

### 6.3 Reconciliation

- | Medicines reconciliation is the process of identifying an accurate list of a person's current medicines and comparing them with the current list in use, recognising any discrepancies and documenting any changes. It includes the 3 Cs

### 6.4 3 Cs to Medicines Reconciliation

- | **Collection** of the medication history from a variety of sources
- | **Checking** that medicines prescribed on admission for the Service User are appropriate for the current status of the Service User. The 'checking' step involves ensuring that the medicines and doses that are now prescribed for the Service User accurately reflect the sources consulted. Discrepancies may be identified at this stage and these may be intentional or unintentional
- | **Communicating** any changes in medicines so that they are readily available to the next person(s) caring for the Service User. Communication must include reasons for the change(s) and any follow-up requirements. Although the process and outcomes may be verbally discussed with other members of the healthcare team there must also be a written record in the Service User's notes record and/or on their prescription chart



## Key Facts - Professionals

Professionals providing this service should be aware of the following:

- | HWCGS Care (T/A Segal Gardens) must work with GP Practices and dispensing pharmacies to develop robust timelines for the procedure of ordering, receipt and reconciliation of medication
- | Health and social care practitioners will ensure that Service Users have the same opportunities to be involved in decisions about their treatment and care as people who do not live in care homes, and that Service Users get the support they need to help them to take a full part in making decisions
- | There must be a clear reconciliation process for all medications held at HWCGS Care (T/A Segal Gardens)



## Key Facts - People affected by the service

People affected by this service should be aware of the following:

- | You have the right to be involved in any decisions about your medication
- | You will be supported, as necessary, to ensure that you have sufficient quantities of the right medication to meet your needs



## Further Reading

As well as the information in the 'underpinning knowledge' section of the review sheet we recommend that you add to your understanding in this policy area by considering the following materials:

**Improving the Quality of Medicines Reconciliation: Best Practice Resource and Toolkit:**

<https://www.sps.nhs.uk/articles/medicines-reconciliation-best-practice-resource-and-toolkit/>

**Royal Pharmaceutical Society: Keeping patients safe when they transfer between care providers – getting the medicines right:**

<https://www.rpharms.com/resources/reports/getting-the-medicines-right>



## Outstanding Practice

To be 'outstanding' in this policy area you could provide evidence that:

- | Stock balances are recorded daily on the MAR
- | An audit process is in place to ensure that correct ordering, reconciliation and reviews take place, that any errors are highlighted and investigated with findings disseminated
- | Service Users are involved in decisions about their medication and there is evidence of partnership working with other members of the multidisciplinary team
- | Stakeholders, such as GPs and pharmacies, report that they are extremely satisfied with the way in which HWCGS Care (T/A Segal Gardens) manages the ordering and management of medication
- | The wide understanding of the policy is enabled by proactive use of the QCS App
- | HWCGS Care (T/A Segal Gardens) undertakes regular reviews alongside the prescriber to reduce polypharmacy.



## Forms

Currently there is no form attached to this policy.