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Pharmacy Technicians: Guidelines on the Delegation of Functions to Pharmacy Technicians (2006)



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Pharmacy Technicians: Guidelines on the Delegation of Functions to Pharmacy Technicians

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Pharmacy Technicians: Guidelines on the Delegation of Functions to Pharmacy Technicians

PREFACE

This is the 2006 edition of the Canadian Society of Hospital Pharmacists (CSHP) Pharmacy Technicians: Guidelines on the Delegation of Functions to Pharmacy Technicians. It replaces the 1992 Guidelines for the Delegation of Functions to Pharmacy Technicians and other Support Personnel. This document was approved as an official CSHP publication by CSHP Council in February 2007.

The delegation of drug-product preparation and distribution functions to pharmacy technicians is essential to allow the pharmacist time for patient care functions. With well-trained technicians, clearly defined policies and procedures, and quality control procedures to ensure ongoing competency, such functions can be delegated without compromising patient safety. These Guidelines were developed to assist hospital pharmacists in determining which functions may be delegated to pharmacy technicians under the direction or supervision of a pharmacist. If provincial or territorial pharmacy regulatory bodies

have specific definitions for a pharmacy technician or rules governing the supervision or delegation of duties, these must be respected.

These guidelines were approved under the title of Guidelines for the Delegation of Functions to Pharmacy Technicians; the title was fine-tuned in 2009.

1. SCOPE

These Guidelines set forth methods for evaluating a task to determine if it may be delegated to pharmacy technicians.

Note: *Hospital pharmacy practice continues to evolve, and it is recognized that sections 3.2 and 3.3 do not provide a complete list of all functions performed in hospital pharmacies.*

2. GLOSSARY OF TERMS, ABBREVIATIONS, AND SYMBOLS

The following definitions apply for terms used in these guidelines. They may have different meanings in other contexts.

Pharmacy technicians

Personnel who assist pharmacists and other health care professionals in the provision of pharmaceutical products and services for delivery to a patient or a patient care area. The responsibilities that a pharmacy technician may undertake are clearly described by the job description/profile in place within a specific institution. The institution is responsible for ensuring that its pharmacy technicians have received appropriate training and certification and that all applicable regulations relating to pharmacy technicians are adhered to.

CSHP Mission:

CSHP is the national voice of pharmacists committed to the advancement of safe, effective medication use and patient care in hospitals and related healthcare settings.



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3. DELEGATION OF FUNCTIONS TO PHARMACY TECHNICIANS

3.1 General Principles of Delegation

3.1.1

A pharmacist shall perform clinical functions involving patient-specific monitoring and the evaluation of drug therapy, as well as functions requiring professional expertise. A pharmacist shall perform all functions restricted to a pharmacist by provincial or federal law.

3.1.2

It is recommended that all pharmacy technicians should have completed a formal training and/or certification program.

3.1.3

A departmental orientation and training program should be developed for pharmacy technicians. A more intensive training program may be required for pharmacy technicians who have not completed a formal training program.

3.1.4

The Director of Pharmacy or pharmacist designate shall be responsible for approving policies and procedures for all departmental activities.

3.1.5

Policies and procedures regarding delegation of duties shall be written and shall outline:

a) requirements for training and/or assessment of individual personnel before they are permitted to undertake delegated functions; and

b) requirements and responsibilities for quality monitoring, such as documentation and interim and final checks.

3.1.6

When pharmacy technicians are performing delegated functions, a pharmacist shall be readily available to answer questions and to provide direction and supervision.

3.1.7

Functions shall be delegated only if there is sufficient opportunity for technicians to practice and maintain the necessary skills.

3.2 Pharmacy Service Functions Routinely Performed by Pharmacy Technicians

It is expected that the following functions will be performed routinely by pharmacy technicians:

- a) repackaging and labelling medication;
- b) preparing, labelling, and checking medication pursuant to a written order or prescription;
- c) selecting and applying auxiliary labels according to an approved list;
- d) filling and checking unit-dose carts according to a manual or computerized fill list;
- e) restocking and checking emergency boxes, cardiac arrest kits, and night cupboard supplies in accordance with an approved list of contents;
- f) restocking cupboards or exchange carts on nursing units according to an approved list;
- g) reconstituting or diluting sterile and nonsterile medications, including checking diluents and volumes, in accordance with an approved list;
- h) preparing and labelling products requiring specialized techniques, including IV admixtures, compounded products, total parenteral nutritional products, and chemotherapy agents, in accordance with approved procedures;

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- i) performing bulk compounding in accordance with approved procedures, when specific formulation and method or preparation are provided in writing for the individual product;
- j) recycling usable medication into active stock;
- k) delivering narcotics and controlled drugs to patient care areas, obtaining signatures of authorized persons as proof of receipt, and maintaining records accordingly;
- l) manually transcribing or performing computer entries of prescriptions for dispensing purposes;
- m) providing routine maintenance of departmental equipment;
- n) collecting workload measurement statistics;
- o) documenting drug distribution processes and outcomes (e.g., medication errors, missing doses);
- p) performing quality assurance audits on technical functions and activities;
- q) performing periodic quality assurance inspections of all areas of the institution where pharmaceuticals are stored; and
- r) orienting and training new staff and students.

3.3 Additional Pharmacy Service Functions that may be Delegated to Pharmacy Technicians

The following functions may be delegated to pharmacy technicians in accordance with the principles described in section 3.1:

- a) developing departmental policies and procedures for approval by pharmacy management;
- b) ensuring that pharmacy technicians adhere to policies and procedures;
- c) communicating with nurses and others about drug distribution issues, e.g., missing doses, refill notices, allergy status;
- d) reviewing medication orders for legibility and completeness and taking corrective action as appropriate (i.e., drug, dose, route, frequency, duration, and allergies);

- e) with the assistance of clinical information software, identifying potential interactions, therapeutic duplications, and incompatibilities within patient profiles;
- f) collecting information on suspected adverse drug reactions for review by a pharmacist;
- g) verifying accurate entry of medication orders into a computer or other record system;
- h) with assistance of department-approved list or reference, verifying compatibilities of ingredients in compounded products;
- i) performing final product checks of all ingredients and quantities for all compounded products, including sterile products, IV admixtures, total parenteral nutritional products, and chemotherapy agents;
- j) controlling and managing inventory, including the selection of manufacturers;
- k) monitoring financial reports;
- l) verifying accuracy of pharmaceutical calculations and arithmetic;
- m) developing formulation instructions and stability and compatibility information for compounded products and forwarding this information to a pharmacist for review; and
- n) performing quality assurance audits involving the drug distribution system and forwarding the results to Pharmacy Department managers.

4. SUPERVISORY RESPONSIBILITIES THAT MAY BE PERFORMED BY PHARMACY TECHNICIANS

The Pharmacy Department may designate supervisory and/or management roles for pharmacy technicians. Responsibilities could include the following:

- a) participating in recruitment and retention of pharmacy technicians;
- b) participating in performance management functions (e.g., performance appraisals, working with Human Resources to monitor sick time usage);

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- c) organizing and conducting staff and student educational programs;
- d) participating on or leading pharmacy or hospital committees related to pharmacy services; and
- e) collaborating with other health care disciplines on pharmacy service delivery and quality assurance.

5. QUALITY ASSURANCE

A quality assurance program shall be established to ensure that delegated tasks are consistently performed at the expected level as defined by the Pharmacy Department's policies and procedures.

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