UKMi Accredited
Medicines Information
Training Scheme
For Pharmacy Technicians

Manual

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Preface

The document 'Better information for managing medicines' was launched in April 2000. It outlined a strategy for developing Medicines Information Services in the UK. In particular it stated that there should be career development pathways for all MI staff. This is further reinforced by the recognition of the Department of Health in 'Pharmacy Workforce in the New NHS' that skill mix review is vital to the future of all pharmacy services.

In support of this strategy, UKMi has led the development of a national scheme for the formal training and assessment of Pharmacy Technicians in Medicines Information.
Acknowledgements

The current Board of Management for the scheme is

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

Vivienne Rose (Course Director)
Medicines Information Technician
Northampton General Hospital
Northampton

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

Beverley Allen
Medicines Information Technician
Doncaster Royal Infirmary
Doncaster

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

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

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

Trevor Beswick, Director South West Medicines Information and Training (until September 2001)
Bristol Royal Infirmary, Bristol

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

Richard Cattell, South West Medicines Information and Training, Bristol Royal Infirmary

Paul Adams, Medicines Information Pharmacist, Gloucestershire Royal NHS Trust

Julia Horwood, London Medicines Information Service (Northwick Park), Harrow
The Board of Management (on behalf of UKMi) will

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

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

Vivienne Rose, Course Director

Vivienne.Rose@ngh.nhs.uk
Welcome to the UKMi Accredited Medicines Information Training Scheme for Pharmacy Technicians

Welcome to the UKMi Accredited Medicines Information Training Scheme manual.

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

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

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

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

This Fourth edition of the manual has been designed and updated with the hindsight of three cohorts and the experience of the Board of Management.
## Glossary of terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
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</table>
| **Trainee** | This is the term used to refer to the Technician undergoing training in Medicines Information.  
  
  The trainee must be a qualified Pharmacy Technician who meets the entry requirements outlined in this manual. |
| **Mentor** | The mentor must be an experienced Medicines Information Pharmacist who has attended the UKMi Introductory Training Course, and has good coaching skills.  
  
  The mentor should offer the trainee guidance and support throughout the training scheme.  
  
  The mentor should:  
  - facilitate the pre-course work  
  - identify relevant policies and procedures  
  - perform regular reviews of the trainee’s progress  
  - identify the enquiry types that are relevant for the trainee  
  - consult on the trainee’s skills assessment  
  - coach the trainee for their practice enquiries against the competencies. |
| **Assessor** | This may or may not be the same person as the mentor.  
  
  The assessor is responsible for the formal assessment of the trainee against the competencies.  
  
  The assessor could be an A1 (formerly D32/D33) professionally competent in Pharmacy, qualified assessor and an experienced Medicines Information Pharmacist. Otherwise the assessment must be performed using a combination of two personnel with these skills. |
Organisational responsibilities of all staff groups involved

Senior Pharmacy Manager

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

Senior Medicines Information Pharmacist

It is the responsibility of the Senior Medicines Information Pharmacist to prepare local standard operating procedures to define the role and processes to be performed by the Medicines Information Technician.

It is also the responsibility of the Senior Medicines Information Pharmacist to ensure that the Medicines Information Technician has an up-to-date and relevant job description.

Medicines Information Technician

It is the responsibility of the Medicines Information Technician to read and understand all relevant standard operating procedures and to work according to these procedures.

The Medicines Information Technician must carefully consider if the role and responsibilities are appropriate for them prior to embarking on this accreditation.
UKMi recommended model for Pharmacy Technicians processing enquiries

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

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

(t = suggested role for technician)

(p = mandatory role for Pharmacist)

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

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

<table>
<thead>
<tr>
<th>Enquiry types included in scheme</th>
<th>Enquiry types not included in scheme</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identification of pharmaceuticals</td>
<td>1. Drugs in pregnancy</td>
</tr>
<tr>
<td>2. Availability of medicines</td>
<td>2. Drugs in breast milk</td>
</tr>
<tr>
<td>3. Formulation and stability of medicines (excluding parenteral administration)</td>
<td>3. Renal function</td>
</tr>
<tr>
<td>4. Interactions</td>
<td>4. Liver function</td>
</tr>
<tr>
<td>5. Adverse drug reactions</td>
<td>5. Choice of treatment and dosing. This includes unlicensed medicines and unlicensed use of licensed medicines.</td>
</tr>
<tr>
<td>7. Travel Medicine</td>
<td>7. General public/ Press/ legal/ non NHS or healthcare issues</td>
</tr>
</tbody>
</table>

1. Receive enquiry (t)
The Medicines Information Technician may receive and document enquiries or refer the enquirer to a Pharmacist according to local standard operating procedures.

2. Assess enquiry, prioritise and assign (p/t)
During the accreditation process the supervising Pharmacist must see all enquiries.
The technician, answering enquiries undertakes all parts of the enquiry answering process, ensuring an appropriate pharmacist provides a check at sometime during the process.
If the technician is inexperienced in Medicines Information, the technician
undertakes all parts of the enquiry answering process, ensuring an appropriate pharmacist provides a check **early on** in this process.

In either case the supervising Pharmacist must also state if they wish to review the prepared answer before it is relayed to the enquirer. **Until the trainee is formally accredited, all enquiries must be checked by the supervising Pharmacist prior to the answer being relayed.**

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

3. **Consider search (t)**
The Medicines Information Technician must consider where to search for the information according to local search strategies and standard operating procedures.

4. **Gather information (t)**
The relevant information should then be gathered.

5. **Analyse information (t)**
The information must be analysed and documented according to local standard operating procedures.

6. **Prepare answer (p/t)**
The answer should be prepared in a suitable format to respond to the enquirer.

7. **Check answer (p/t)**
The response prepared must be checked against the initial request by the Technician for accuracy. The supervising Pharmacist must perform a check
   - whilst the Technician is undergoing training
   - when a Pharmacist has requested
   - if the Technician requires confirmation of the answer prior to the answer being relayed.

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

9. **Record and file (t)**
When the enquiry has been completed the document must be recorded and filed according to standard operating procedures.
UKMi recommended model for Pharmacy Technicians processing enquiries

1. Receive the enquiry (t)

2. Assess, prioritise & assign (p/t)
   See 2 page 7

3. Consider the search (t)

4. Gather information (t)

5. Analyse information (t)

6. Prepare the answer (p/t)

7. Check the answer (p/t)

8. Relay the answer (p/t)

9. Record and file (t)
About the Training and Accreditation Scheme

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

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

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

Time-Scale for Completion

All candidates must present themselves and their portfolio for assessment within one year of attending the residential induction course.

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

Additional categories may be submitted annually, according to the process detailed later in the manual.

Financial Rewards

UKMi recommend that any financial rewards are dealt with locally by Senior Pharmacy Managers.
Entry to the Training Scheme

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

- meet the entry criteria

and

- complete the application form.

Entry Criteria

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

and

- Registered with the RPSGB or in the process of registering with the RPSGB (it will be a requirement of assessment to show registration certificate)

and

- two year post qualification hospital pharmacy experience that is considered to be appropriate and relevant (see overleaf for guidance)

and

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

and

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

and

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

Entry requirements are designed to allow local selection of trainees with appropriate experience and suitability for the role.
Application Form
UKMi Accredited Medicines Information Training Scheme for Pharmacy Technicians

Applicant details

Name

Job Title

Full Name and Address of Hospital

E-mail Address

Work telephone number

Home Address

Telephone number (in case of emergency)

Professional Qualification (Please attach copy of certificate)

Length of Medicines Information experience

Copy of Job Description

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

RPSGB Registration Number

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

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

| Identification of Pharmaceuticals |  |
| Availability of medicines |  |
| Pharmaceutical - Stability |  |
| Pharmaceutical - Formulation |  |
| Interactions |  |
| ADRs - General |  |
| Complementary medicine - Herbal |  |
| Travel medicine – without vaccines |  |
| Travel medicine – with vaccines |  |

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

Signed

Date
Mentor details

<table>
<thead>
<tr>
<th>Name</th>
<th>E-mail address</th>
<th>Work telephone number</th>
</tr>
</thead>
</table>

Job Title

I am a Medicines Information Pharmacist with _______ years experience. I have good coaching skills and I am willing to mentor the trainee named above.

I will attend the mentors training day.

Signed __________________________  Date __________

Approval from Medicines Information Manager (please tick)

- The department subscribes to the principles of the UKMi QA standards
- I enclose a copy of a QA audit completed within the last 3 years and action plan (if appropriate)
- I will ensure that standard operating procedures are in place prior to assessing the trainee
- The trainee will have access to a professionally competent in Pharmacy qualified A1 (formerly D32/D33) assessor
- I have clearly defined the lines of accountability
- I will ensure that the trainee's job description reflects their role
- I take responsibility to ensure that the trainee will work with adequate supervision to meet the recommendations in the scheme manual and they will continue to have adequate support of a Pharmacist when accredited.
- Once accepted onto the course full payment will be made, and will still be due in the event of the technician subsequently withdrawing from the scheme.

Signed __________________________  Date __________

Approval from Senior Pharmacy Manager

I have informed the trust board of the Pharmacy Technicians role in Medicines Information to ensure that the Pharmacy Technicians is covered by clinical indemnity.

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

and

I approve this Medicines Information Pharmacist as an appropriate mentor.

Signed __________________________  Date __________

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

I support this application for the UKMi accredited Medicines Information training scheme for Pharmacy Technicians.

Signed                                           Date

On completion of the application form please return it to:

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

Payment of course fees of £750 will be requested with confirmation of place, and will still be due in the event of the technician subsequently withdrawing from the scheme.

Arrangements can be made for the invoice to be divided over two financial years, please contact the Course Director for further information.

Closing date for applications: 27th March 2009
The Accreditation Programme

1. Pre-course work experience (Commence portfolio building)

2. Two Day Residential Induction Course

3. Skills Assessment

4. Five Practice Assessments for each competency

5. Five Competent Formal Observed Assessments (for each competence required) ONE to be observed by an A1 Assessor

6. Assessment (see Assessment Process Timetable)

7. Probationary Period

8. Certificate of Achievement of Accreditation

Working knowledge of policies and procedures

Ongoing review (see appendix 1)
1. **Pre-course work**

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

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

### Tasks

1. Prepare a diagram to illustrate the lines of responsibility (structure) within your Medicines Information department, including who to consult in the absence of the MI Pharmacist.

2. Read Chapter B What is Medicines Information, UKMi Workbook.
   - Prepare a diagram to illustrate how your department networks with other Medicines Information departments e.g. locally, regionally and nationally.
   - Make a list of the potential customers/enquirers for your department.
   - Find out if your department provides any specialist information and advisory services and where specialist information services are located nationally.

3. Read Chapter D Sources of Information, UKMi Workbook. Make a list of the key sources of information that are available in your centre and the types of information they contain.

4. Make a list of the significant legal and ethical issues that you need to consider when working in Medicines Information (Read the relevant sections of MiCAL and the UKMi workbook) Write brief notes on how the legal and ethical issues will impact on your working practices.

5. Complete the relevant chapters of the UKMi workbook for enquiry types accreditation is being applied for

6. Visit to Regional MI Centre – (prior to assessment will be acceptable if it is not possible to visit before the residential course)

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**Evidence of completing these tasks, including the workbook countersigned by your mentor must be brought to the residential induction course.**
Ongoing Reviews with Mentor
(see appendix 1 for further information)

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

• to ensure that there is regular communication between the trainee and the mentor and

• to create an opportunity to reflect on the progress of the trainee.

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

Suggested times for reviews will be:

• on completion of the pre-course work, prior to attending residential induction course
• skills assessment after residential induction course
• during practice enquiries
• on completion of practice enquiries, prior to commencing formal observed assessments
• on completion of the portfolio, in preparation for the assessment interview

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

The completed review form for the first review (prior to attending the residential induction) must be brought to the residential induction course.

To aid the review process, a list of points to consider in preparation for the review has been included in appendix 1.
Knowledge of policies and procedures

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

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

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

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

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

The trainee should then:

1. Collect and read all relevant procedures, highlight actions appropriate to the Medicines Information Technician and include them in their personal portfolio of evidence.

   (The purpose of this is so that they have the procedures for future reference.)

2. Demonstrate to the mentor their understanding of all relevant procedures prior to commencing any of the activities involved in the training scheme.

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

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

This stage of the scheme, which involves developing a working knowledge of policies and procedures, must be covered prior to beginning the formal observed assessments.
2. The Two-Day Residential Induction Course

After completing the pre-course work experience, trainees must attend and complete a residential induction course.

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

Topics included in the course programme are:

- Structure and role of Medicines Information locally, regionally and nationally. To include discussion regarding the relationships with other organisations e.g. pharmaceutical industry, National Prescribing Centre, Royal Pharmaceutical Society.

- Scope of the role of the MI Technician.

- Legal and ethical aspects, to include
  - Framework for Pharmacy Technicians in Medicines Information
  - Negligence/liability
  - Confidentiality
  - Responsibility and accountability

- Types of information. To include sources available and search strategies.

- Application of information to enquiries.

- About the training scheme, requirements and purpose of each stage.

- The training scheme documentation.

The actual programme will be available to successful applicants and via the UKMi website. A certificate of attendance must be entered in the trainee’s portfolio of evidence.
3. Skills Assessment

As many Technicians completing the accreditation will have already gained a valuable array of skills and experience, we will need to take this into account when identifying their training needs.

After completing the two-day residential induction course, trainees must reflect on their current skills and knowledge.

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

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

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

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

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

Training tasks should be prepared locally to develop these skills.

Evidence of the skills assessment and training tasks performed, over a period of time, must be entered in the trainee's portfolio of evidence.
4. Competencies and Log sheets

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

1. General competencies
These apply to ALL enquiry types. They must be completed on a minimum of 5 occasions each at the practice and assessment stages. Documentation of meeting the standards is required on five occasions but ALL enquiries must meet the standards.

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

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

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

✔ A tick must be placed in the column where the trainee performs the competency appropriately.

✗ A cross must be placed in the column if the trainee does not perform the competency appropriately.
5. Practice enquiries

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

Documenting the practice enquiries

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

For the practice enquiries up to 4 of the 5 competencies can be from enquiries previously answered, to enable technicians with considerable experience to have some credit for their prior learning. Technicians with 2 years experience only may submit enquiries completed prior to the scheme.

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

On completion of each practice enquiry constructive feedback must given to the trainee and documented.
6. Formal observed assessments

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

Preparing for the formal observed assessment

The trainee and the assessor must discuss and agree when the trainee is ready to begin assessments.

For each enquiry type a checklist of relevant competencies has been prepared. The trainee must be familiar with the competencies that they will be assessed against, so that they are aware of the standards for competence.

There is no set order in which the enquiry types must be covered and trainees can collect evidence for more than one enquiry type at a time.

Previously answered enquiries cannot be included as part of the formal assessment.

Who can be an assessor?

The assessor may or may not be the same person as the mentor. The assessor could be an A1 (formerly D32/D33) professionally competent in Pharmacy, qualified assessor and an experienced MI pharmacist. If this is not the case a combination of two individuals with these skills must be used on at least one occasion for each competency being assessed.

Conducting the assessment within the Local MI centre

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

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

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

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

On completion of the assessment a decision must be immediately given to the trainee as to whether the assessment has been completed successfully or not. All feedback given to the trainee must be documented on a feedback sheet, as soon as practical.

The AI assessor must sign the paperwork at the time of assessment.
7. The UKMi Assessment Process

1. The mentor writes to the Course Director (copying in the Regional Director of Medicines Information) indicating that the portfolio and summary of achievements form are complete.

2. The trainee forwards their portfolio to their allocated assessor by the Portfolio submission date.

3. The assessor then checks and assesses the portfolio against the standard marking scheme prior to the assessment interview. The assessor will bring the portfolio and feedback to the interview.

4. Trainee attends assessment interview (the panel consists of one of the Board of Management and one Regional Director of Medicines Information)
   a. The portfolio assessor provides the trainee with a letter indicating either a pass or further work required to achieve a pass. Any further work required will include a deadline.
   b. The trainee is contacted within 3 working days with the outcome of the interview.

5. Any further work required is submitted and assessed.

6. Successful trainees undertake a four-week probationary period.

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

8. UKMi then enters the trainee onto the register of accredited Medicines Information Technicians for a period of 2 years and a certificate of completion will be issued to the Technician.

9. Additional enquiry types may be added later as practice develops. The trainee must submit the relevant sections of the portfolio for assessment, which will usually be in September.

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

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

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

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

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

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

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

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

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

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

The named mentor should contact the Course Director on satisfactory completion of all stages. The trainee will be recorded in the national register of accredited Medicines Information Technicians, and issued with a certificate of achievement.
10. Re-accreditation

The accreditation will be valid for two years from the date of issue of the certificate. At the end of these two years the accredited Technician will be required to provide:

- evidence of remaining actively involved in enquiry answering and engaged as a Medicines Information Technician. Assessment of quality of enquiries answered by the technician will also be undertaken. Full details will be supplied when the Board of Management requests documentation for re-accreditation.

- a statement signed by the Medicines Information Manager and Senior Pharmacy Manager that the Technician remains currently engaged in Medicines Information activities and continues to have their confidence

for assessment by the Board of Management.

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

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

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

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

We wish to ensure that all trainees are treated fairly, equally and with respect in relation to their assessment.

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

The formal appeal procedure must then be followed:

1. All appeals against the conduct, adequacy or outcome of an assessment interview must be forwarded in writing to the Board of Management within 10 working days of the trainee having given notice of their intention.

2. On receipt of notification of an appeal the Board of Management will:
   - set a date for the appeal to be heard by the appeals panel
   - decide how and by whom the appeal will be heard
   - inform the trainee by letter of the date of the appeal

3. The appeal panel will meet within 20 working days of receipt of the written notification of the appeal

4. The appeal panel will consist of:
   A representative of the Board of Management (not otherwise involved in the assessment)
   A Regional Director of Medicines Information (not otherwise involved in the assessment)
   A Senior Medicines Information Pharmacist (not otherwise involved in the assessment)

   The trainee will be offered the opportunity to be accompanied by a person of their choice to help them present their evidence.

5. The appeals panel will reach a decision and all involved parties will receive written notification within 10 working days.
Appendix 1

Information for Mentors

Introduction

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

Role of the Mentor

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

Who can be a Mentor?

The mentor must be an experienced Medicines Information Pharmacist based within the trainee's Trust with a minimum of two years experience as a Medicines Information Pharmacist. It is recommended that the mentor is someone who has the opportunity to meet regularly with the trainee to discuss progress and give feedback. They should have attended the UKMi National Training Course and must be approved by the Senior Pharmacy Manager.

Duties of the mentor

- Planning the implementation of the Medicines Information accreditation practice in the department. This should take into consideration “guidance on practice activities” (see overleaf)

- Confirming that trainees have a clear understanding of all relevant policies and procedures

- Supporting the trainee to complete the pre-course activities and tasks, and providing any additional support to address the change in the working environment

- Ensuring that the trainee is positive about working in an office environment prior to completing the residential induction

- Providing constructive feedback to the trainee regarding their skills assessment

- Assessing the trainee objectively against the standards set in the scheme

- Documenting the progress of the trainee by performing regular reviews, this information will be reviewed by the assessment panel

- Preparing trainees for the assessment interview

- Liaising with the Board of Management
• Assisting the Technician with assembling their personal portfolio of evidence

• Encouraging the trainee to network with other trainees and accredited Medicines Information Technicians

• Ensuring the trainee is competent before recommending them to go forward for assessment.

Guidance on issues for local discussion

It will be necessary to:

• Establish clear departmental standard operating procedures and guidelines on the roles and responsibilities of a Medicines Information Technician prior to them embarking on these roles.

• Ensure that all staff whose work may be affected by the implementation of the scheme are fully informed of the process

• Identify the enquiry types appropriate for the Technician to cover locally

• Design tasks to develop the trainee’s skills. (As tasks are prepared they should be forwarded to the Board of Management to be shared with other centres)

• Implement a local system that clearly indicates if the supervising Pharmacist has screened the enquiry and if the Pharmacist needs to review the information prior to the answer being relayed.
Suggested preparation questions for trainee prior to review

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

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

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

• How is the trainee progressing through the scheme?

• What is the trainee doing well in their role?

• Are there any areas that the trainee is finding difficult and requires additional support?

• Are there any features of the trainee's performance that you are concerned about?

• Does the trainee have any weaknesses in their role where you can offer support?

• Is the trainee's level of confidence appropriate in their role?

• How has the trainee performed in quieter sessions?

• How has the trainee performed in busier sessions?

• Would you recommend that the trainee continue with the scheme?

• Are there any other comments that you feel may be relevant?