

Implementation of an electronic tracking system for managing formulary applications in a Welsh health board

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Cardiff and Vale University Health Board process requires **medicines formulary applications** to be approved by different clinical divisions.

An electronic system was developed and implemented to store documentation and **track the application** through the stages of this process. **Progression through process is available** for viewing by all stakeholders.

Improved access to information on applications in process, using a **widely available electronic system** facilitates reporting and efficiency.

Introduction

In January 2017, as a requirement of the New Treatment Fund, Welsh Government instructed health boards to make new medicines recommended by the National Institute for Health and Care Excellence (NICE) and the All-Wales Medicines Strategy Group (AWMSG) available as quickly as reasonably practicable, and within two months of the recommendation.

Cardiff and Vale University Health Board process requires that all new medicines formulary applications are approved for implementation by appropriate clinical divisions and subsequently ratified by the health board's corporate Medicines Management Group. The Medicines Information formulary team facilitates this process and reports progress directly to the corporate Medicines Management Group. It is imperative that this process is efficient, robust and user-friendly.

Objective - develop a bespoke electronic system (Formulary Application Tracker (Figure 1)) to:

- store formulary application documentation
- track applications through the approval process
- allow progress of applications to be viewed by all stakeholders
- provide a robust mechanism for generating reports on formulary application activity.

Method

Microsoft Access **training was undertaken by key staff in Medicines Information** comprising formulary pharmacists, a technician, and IT liaison lead. Equipping Medicines Information staff with these skills allows the electronic **Formulary Application Tracker** database to be managed and further developed internally. User feedback was sought regularly during development of the first prototype which was **launched for use in November 2017**.



Figure 1: Formulary Application Tracker

Discussion

The electronic Formulary Application Tracker provides **visibility of application progression** and facilitates **process efficiency**. The underpinning principles apply to other document driven approval processes, for example medicines treatment pathways, non-formulary and unlicensed medicines, which are all currently in development. **Educating existing staff** in the use of Microsoft Access is a **prudent, cost-effective** way of creating a bespoke system which may be readily developed according to local needs.

Results

- To date **126 applications** for new medicines have been managed using the Formulary Application Tracker.
- **Monthly reports** are provided to the health board's corporate Medicines Management Group.
- Each stage of the process is visible and **supports efficiency in practice**.