Orientation to Practice Guide

The following Orientation to Practice Guide has been compiled as a tool for new practicing members or for new pharmacy personnel. This list is not exhaustive and is not intended to replace any formal training or orientation programs that individual pharmacies may already have in place. Completion of this list does not certify competency or proficiency of pharmacy personnel; it is to help facilitate individual orientation. Pharmacy managers and hospital pharmacy department heads are responsible for ensuring their pharmacy staff have the training and the knowledge to practice safely in the pharmacy.

As a new member of the pharmacy team you should fully familiarize yourself with the pharmacy and how it operates, where everything is located, and who to contact with questions before allowing yourself to be left alone in it. This includes becoming familiar with the roles of systems and the functions of the processes that those systems are comprised of (e.g. inventory management), as well as the roles of each staff member and their functions and activities within those roles. Of particular importance are the pharmacy manager, assistant managers or those who manage/supervise while the manager is away, privacy officer, continuous quality improvement coordinator. If you do not feel confident enough to be left “in charge” or alone in the pharmacy, then it is your responsibility to voice your concerns to the pharmacy manager.

General Pharmacy Operations:

- ❑ What is the overall orientation of the pharmacy? What is within and outside of its boundaries?
- ❑ What are the expectations for lab coats, clothing and professional appearance?
- ❑ What are the expectations for identification (i.e. posting licenses, pharmacy permit, etc.) and name tags? How do I get a name tag? What should it say?
- ❑ Does the pharmacy have business cards for clients and patients? Where are they stored?
- ❑ Where can I store my personal items?
- ❑ What is the procedure for opening the pharmacy? Closing the pharmacy?
- ❑ Will I need to have access to the pharmacy after hours, and if so, what is the procedure?
- ❑ What keys will I need to have access to and where are they kept?
- ❑ What security passwords do I need to have (i.e. keypad code, telephone password, etc.)?
- ❑ What passwords do I need to know for the computer? What passwords do I need to know for the cash register?
- ❑ What is the combination for the narcotic safe?
- ❑ How do I access reference material? Where are the hard copies? What electronic references are available and how do I access them?
- ❑ Where can I find emergency contact information?
- ❑ How do I retrieve messages from the phone? How do I transfer calls? What is the paging system in the pharmacy/store?
- ❑ Am I expected to print daily reports? Weekly reports? Are there reports that I need to follow up with (e.g. failed PIP transaction report)?
- ❑ What procedures do I need to follow for end-of-the-day computer reporting?

- ❑ Does the pharmacy have a Lock and Leave permit? What are the rules and procedures?
- ❑ What is the preferred method of communicating with physicians and other prescribers?
- ❑ What is the preferred method of communication with other pharmacies and pharmacy professionals?
- ❑ Where do I find fax cover letters?
- ❑ What do I do in the event of an armed robbery?
- ❑ What do I do in the event of a break and enter?
- ❑ What is the security system in the store?
- ❑ What is the emergency evacuation procedure?
- ❑ What are the procedures for other emergencies such as power failures?
- ❑ Does the pharmacy offer delivery? If so, what are the delivery procedures?
- ❑ Where are supplies found:
  - Office supplies?
  - Cleaning supplies/garbage bags?
  - Prescription vials?
  - Bottles? Jars?
  - Compounding supplies?
  - Distilled water?
  - Other?
- ❑ What is the process for filing prescriptions?
- ❑ What is the process for filing narcotics?
- ❑ What are the security and accountability measures for controlled substances and narcotics?
- ❑ What is the process for transferring prescriptions?
- ❑ What is the process for receiving transferred prescriptions?
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Inventory:

- ❑ What is the process for ordering drugs in the pharmacy?
- ❑ What is the process for completing special orders in the pharmacy?
- ❑ How am I able to check inventory levels using pharmacy software?
- ❑ When do drug orders arrive? When do front store orders arrive?
- ❑ Am I familiar with our wholesaler's procedures?
- ❑ Do we have a procedure for borrowing/lending pharmacy stock to other pharmacies?
- ❑ Am I expected to know about front store inventory procedures?
- ❑ If I am unable to completely fill a prescription, how do I manage a balance owed to a patient? Does the pharmacy have a process for what percentage of the prescription to fill?
- ❑ What are the accountability measures for controlled substances inventory? Narcotic inventory (e.g. back-count record)?
- ❑ Where is vaccine wastage and cold chain breaks recorded?
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Safety and Privacy:

- ❑ What is the process for managing and reporting drug errors, privacy breaches, and medication incidents?
- ❑ What is the process for reporting adverse reactions?
- ❑ Who is the Privacy Officer?
- ❑ What are the pharmacy's privacy policies?
- ❑ How do I handle a privacy complaint?
- ❑ How do I handle any other complaint?
- ❑ What are the pharmacy policies for the above and other situations?
- ❑ Who is the Continuous Quality Improvement (CQI) coordinator?
- ❑ Do I know how to use the COMPASS tools (e.g. CPhIR to report a medication incident)?
- ❑ Do I understand how to review pharmacy process in response to a medication incident, and document the development and monitoring of a pharmacy improvement plan?
- ❑ What should be shredded (i.e. what documents contain private patient information, proprietary information, etc.)? Where does shredding go? What are the protocols for shredding disposal?
- ❑ What are the quality assurance processes (beyond error reporting) in the pharmacy? (i.e. pharmacy newsletters, meetings, suggestion boards to be aware of, etc.)? Where are they recorded (i.e. only COMPASS, internal reporting system, etc.)?
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Pharmacy Software:

- ❑ Do I know how to operate the pharmacy practice management system – billing, record keeping, PIP, EHR Viewer, documentation, reporting such as narcotic and controlled drug prescription sales?
- ❑ What is the general process for processing prescriptions?
- ❑ How do I input prescriptions if they are not being filled immediately? New prescriptions should always replace older prescriptions on patient's file, how is this linked on patient's file?
- ❑ What is the procedure for managing a prescription for a patient not on file?
- ❑ Is there a Help Guide for the software programming and what is the general troubleshooting process for software issues?
- ❑ What other computer programs are available (e.g. word processing)?
- ❑ What other support tools are available within the pharmacy's computer system (i.e. Lexicomp, access to Pharmacist's Letter, etc.)?
- ❑ What other documentation and record keeping are available within the pharmacy's computer system (e.g. password protected patient lists)?
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Third Party Billing/NIHB:

- ❑ Where can I find Help Desk contact information for each provider?
- ❑ Where can I find our provider numbers for each provider?
- ❑ Are there cheat sheets for online submissions and a list of override codes for each provider?

- ❑ What is the process for WCB claims?
- ❑ How do I process claims that require manual submission?
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Saskatchewan Drug Plan/PIP:

- ❑ Am I able to access PIP? eHealth?
- ❑ Am I able to access the Saskatchewan Drug Plan online formulary?
- ❑ Am I familiar with billing procedures for Plan 1 and Plan 2?
- ❑ How are Exceptional Drug Status requests usually made? What is the pharmacy procedure for managing medications that require EDS?
- ❑ Am I familiar with MAC pricing? No substitution policy? Prescription quantity guidelines (34 days vs 2 months vs 100 days)?
- ❑ How do I process emergency claims?
- ❑ Do I know the PIP data quality issues and how to resolve them (e.g. daily failed transactions report)?
- ❑ How do I process out of province claims?
- ❑ How are pharmacy services priced (e.g. out of pocket minor ailment prescribing)?
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Additional Clinical Services/Prescriptive Authority, Minor Ailment Prescribing and Injections:

- ❑ What clinical services does this pharmacy provide? Am I proficient in providing these services (i.e. injections, SMAPS, Minor Ailment prescribing, etc.)? Are there any limitations?
- ❑ Am I a conscientious objector and if so, have I advised management? Should I be aware of conscientious objectors on staff, and am I expected to cover for them? What is the system for advising and then referring a patient in the event of a conscientious objection?
- ❑ Am I familiar with the billing process and documentation requirements for prescribing?
- ❑ Where are prescribing documents stored in the pharmacy (including prescribing documents such as PARs)?
- ❑ Does the pharmacy have existing collaborative prescribing agreements?
- ❑ Does the store have a call back program? How do I follow up with patients?
- ❑ If injections are administered, where in the pharmacy are the injections administered?
- ❑ How does injection prescribing and administration fit in to pharmacy workflow? As a regular prescription? Only by appointment?
- ❑ Where are injection supplies stored?
- ❑ Needle stick policy?
- ❑ How to maintain, monitor, and report fridge temperatures and vaccine storage?
- ❑ Do I know what constitutes a “cold-chain break”? How to report a cold-chain break? What to do with vaccine/fridge item wastage?
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Compliance Package Procedure:

- ❑ Where are the supplies for compliance packaging found?
- ❑ What is the general process for compliance packaging? How is quality assurance reported for compliance packaging?
- ❑ Is there a fee for compliance packaging?
- ❑ How does the pharmacy document changes made to the compliance packaging?
- ❑ What is the procedure for OTC products provided in compliance packaging?
- ❑ What are the order entry procedures for compliance packaging?
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Long-Term Care:

- ❑ What existing contracts does the pharmacy have, and what services does the pharmacy provide?
- ❑ What is the after-hours procedure for LTC facilities?
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Opioid Agonist Therapy Procedure:

- ❑ What is the pharmacy's procedure for providing opioid agonist therapy products?
- ❑ Where do I find the supplies for opioid agonist therapy products (i.e. daily doses, logbooks, cups, etc.)?
- ❑ How do I identify patients receiving daily witness doses?
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Compounding:

- ❑ What are the pharmacy's protocols around compounding?
- ❑ Where are the compounding supplies located?
- ❑ What is the appropriate area for compounding?
- ❑ Am I familiar with the billing procedures for compounding?
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Customer Service:

- ❑ What does the general workflow of the pharmacy look like?
- ❑ Are there any special procedures or special requests from customers that I need to be aware of? Do any patients have specific payment arrangements/accounts established?
- ❑ Are there any additional services offered by the pharmacy (i.e. consultant services, compression stockings, on-going clinics, breast pumps, etc.) that I need to be aware of?
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Additional Expectations:

- ❑ Am I familiar with corporate policies (i.e. confidentiality, personal use of equipment, etc.), and where can I find additional information about corporate policy?
- ❑ What is the return policy of the pharmacy?
- ❑ How are shifts and breaks scheduled? What are the expectations for lunch and rest breaks? Am I permitted to leave the pharmacy on lunch or rest breaks? How do shifts overlap?
- ❑ What are rules and protocols around Schedule II and III, and unscheduled drugs? Who orders and maintains inventory? Documentation on patients' files?
- ❑ What is the pharmacy's control, rules, and protocols over low-dose (exempted) codeine products, needle exchange, etc.?
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Questions?
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