June 2020

PSNC Briefing 021/20: PSNC Pharmacy Advice Audit – Team Briefing Sheet

This briefing describes how community pharmacy teams can take part in PSNC's audit to capture information about all of the advice that pharmacies are giving to patients and local communities.

Background and audit aim

Each day, pharmacy teams assess and give advice to large numbers of patients who have developed minor illnesses, patients who require healthy living advice, and patients who need to be signposted to other services that are better placed to meet their needs. Many of these interactions are not recorded and our discussions about the future of pharmacy are hampered by the lack of quantitative data to demonstrate the value of that advice.

The aim of this audit is to gather data on the current workload for Community Pharmacy teams in providing that advice, and to support you in improving the advice that you provide. The audit can be used as your mandatory pharmacy-selected clinical audit for the year 2020/21.

Criteria and standards

The clinical audit will examine **patient/customer interactions where advice was given** (consultations) by either a non-pharmacist team member and/or a pharmacist. You will record these by ticking a series of boxes on the audit form, then submitting data on PharmOutcomes.

You must **record data for at least one day**, capturing all consultations. If fewer than 20 consultations were recorded that day, you must continue with the audit until 20 have been recorded, recording the time in days (to the nearest quarter of a day) it took you to reach 20 consultations. Data from the audit will be submitted to PSNC for national analysis and for use in discussions about community pharmacy.

All interactions would ideally be recorded, but if some are not, this could lead to a misinterpretation of the number of consultations your team has undertaken. You must **estimate the percentage of consultations that were recorded**, e.g. the pharmacy team recorded 20 consultations but believe they conducted 25, therefore the percentage recorded was 80% of the total.

Audit is about improving practice, so you must **rate your confidence** in the advice you gave for each referral. This data will help you to identify learning needs or gaps in signposting information for your team.

Your audit standards will be:
- 95% of your consultations will have a confidence score of 4 or more.

Do not record consultations where a product is requested by name, unless this leads to additional advice being provided beyond that on safe use of the product. Do not record advice given relating to a prescription being dispensed.

Data Capture

You must record the following data, choosing the most appropriate response from each list.

1. Why **advice** was requested:
   - *New symptoms* (minor ailments) or *Lifestyle advice*
   - *After a pharmacy service* (but not as part of that service)
     - For example, during a stop smoking service you discovered that the patient had indigestion and so you gave advice on managing symptoms, lifestyle changes and when to seek further advice.
   - *A known medical condition or medicine*

o This relates to queries outside of the normal dispensing process of a medication. For example, a patient with COPD had symptoms of a chest infection so you advised them to see their GP.
- *Other* consultations not listed above

This data will help us review the type of advice sought by patients.

2. **Outcomes**:
   - Advice may be *Appropriate advice only* or *Appropriate advice and sale* of a medicine. If you advised a patient about a medicine that was not sold at that point, for example because the patient had a supply at home, then record as Advice only.
   - Referral to either the *pharmacist* in the pharmacy, a pharmacy *commissioned service*, e.g. stop smoking service, their G.P. *surgery*, *Out of hours / Minor Injury / A&E* or other acute care centre, or *other* location.
   - Signposting for either *health support,* for example a charity related to a health condition, or *social care* support, for example for a care needs assessment.

   This data will help us to see what type of advice that is given by pharmacy teams.

3. **Alternatives:**
   Tell the patient that you are doing an audit and ask them what they would have done if they could not contact a pharmacy. Record their response.
   This data will help us to estimate savings made by the NHS.

4. **Duration:**
   Estimate how long you spent with the patient gathering information and giving advice. If the pharmacist and another team member both spent time with the patient, then you must record the duration for each.
   This data will help us to estimate workload for pharmacy teams.

5. **Confidence:**
   Rate your confidence in the advice you gave from 1 – 5.
   This data will help your team identify how you can develop and enable PSNC to understand where there is a national need for support.

The data capture form

Each person who completes a consultation must also complete the data capture form. Each consultation is made on a different line.

If two team members consulted with a patient, they both must record the consultation on the same line. For example, if one team member started the consultation and referred to the pharmacist, the pharmacist would complete the remainder of the form capturing the outcome. Both team members would need to record their time spent with the patient.

There is an example of how to complete the data capture form in Appendix 1.

Data entry

When all consultations have been completed, you must complete **two PharmOutcomes modules** so that PSNC can act on your findings.

1. Pharmacy Consultation Audit – Overview
   o One-time entry to give us context about your consultations.
2. Pharmacy Consultation Audit – Data Entry
   o Complete this form once for each consultation that was held. Each entry takes approximately 30 seconds.

Analysis and change

Review the data you have recorded and discuss with your team. Consider if there are areas where improved signposting information or CPD might improve confidence ratings. Could your team be more proactive or offer advice to different patient groups?

Complete the audit form below to record your audit analysis. Save this form with these instructions and the data capture form for two full NHS years (April to March). Your NHSE&I regional team may ask to see a copy as part of the Community Pharmacy Assurance Framework (CPAF).

During what date(s) did you undertake the audit?	What percentage of consultations were recorded?

Did you meet the audit standard?
☐   95% of your consultations will have a confidence score of 4 or more

What changes will you make?	
PSNC will: *Compile a national dataset and use it in discussions about community pharmacy and future learning needs.*	The **pharmacy team** will:

Date that you will repeat the audit to check if those changes were effective:

Frequently asked questions

Q. If a patient presents asking for a 'box of paracetamol', do I record the consultation?
No. If the only outcome was the safe sale of the medication, then this is not covered by the audit.

Q. If a patient presents asking for a product to help with a headache, do I record the consultation?
Yes. This consultation will have allowed the pharmacy team to diagnose the patient and provide the right support, guidance, referral and product as required for the condition.

Q. The pharmacy conducts the audit over one day but forgets to record consultations for 3 out of the 10 hours the pharmacy is open. How do I record this?
In the PharmOutcomes Overview form, enter that you captured 70% of the consultations.

Q. I have carried out the audit for one day but have only captured 15 consultations. What do I do?
You need to continue the audit on the following day to achieve at least 20 consultations. You then need to record the time spent conducting the audit.

Q. A customer asks about their existing condition whilst I am dispensing the medication for it. Can I include this?
No. This advice is part of the dispensing service. If the patient contacts you at some other point, this can be included in the audit.

Q. I haven't got a PharmOutcomes account, how can I enter my data?
The PharmOutcomes audit modules are being made available to all contractors free of charge under PSNC's licence. If you haven't used it before, please request log in details by sending a message to the **PharmOutcomes helpdesk**.

Feedback from the pilot

The audit was piloted in a small number of pharmacies in the South West and here is the feedback received:

"Was easy and no problems - the guys [team] *bought into it so wasn't a problem"*
"It was pretty straight forward, just the normal conversations"
"Good to see quantitative results for how much time spent with patients helping them. Audit was easy and straight forward to complete"

If you have queries on this PSNC Briefing or you require more information, contact PSNC's Communications Team.

Appendix 1: Example of how to complete the form

| First contact with patient | | Time | | Type of consultation | | | Presenting Complaint | | | | | Outcome | | | | | | | | | What would the patient have done if they hadn't contacted the pharmacy? | | | | | Consultation Time (mins) | | Rate you confidence in the advice that you provided (1=low; 5=high) |
| | | | | | | | | | | | | Appropriate advice given only | Appropriate advice given and sale of a medicine | Referral | | | | | Signposting | | | | | | | | | |
Pharmacist	Non-Pharmacist	Before 18:00	After 18:00	Phone	Face to Face	Online	Responding to Symptoms	Healthy Living Advice	Referred in via a pharmacy service	A known medical condition or medicine	Other			Pharmacist (if applicable)	Pharmacy service (EHC/NRT/Flu etc)	Surgery	Out of hours / Minor Injury / A&E	Other	Other health support agency	Other social care support	Not done anything else	GP Surgery	A&E / Walk in centre	Accessed NHS111	Other	Pharmacist	Non-pharmacist	
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