# Priority Process: Medication Management

**Description:** Promoting a collaborative approach for medication safety.

*Note: The Priority Process tool is intended to be a guideline only. It is not necessary to ask every question.*

## Planning the Medication Management System:
- Is there an up-to-date, evidence-based list of available medications? How do team members access this list?
- Do team members know about newly available medications?
- What are your processes or criteria to approve medication selection for particular client areas?

## Selecting and Storing Medications:
- How are medications selected?
- Do the medication storage areas meet needs? Why or why not?
- What is the process for clearly labelling all medication concentrations?
- How are team members informed about problematic medication names, packaging, or labelling?
- What is the process to obtain medications that are not on the approved list?

## Preparing and Dispensing Medications:
- What steps are taken to prevent contamination when preparing medications?
- What is the process to ensure that medications are dispensed safely, accurately, and in a timely way?
- How are medications dispensed when there is no internal pharmacy, or when it is closed?
- What is the process to safely transport medications?

## Evaluating the Medication Management System:
- What is the process to report medication errors and adverse drug reactions?
- How are these investigated?
- Is there a formal process to report medication errors to clients?
- Is there monitoring of the medication management system? Do you use performance measures?

## Providing Education and Training:
- Do team members have the necessary qualifications to safely administer medications?
- Do you train team members on your medication management system? Does it include information on how to report medication errors and adverse drug reactions?
- Do you keep track of the training needs of team members?

## Prescribing and Ordering Medications:
- Do team members have up-to-date client information?
- What is the process for communicating medication orders and information?
- What is the process for reviewing prescriptions and medication orders for accuracy and appropriateness?

## Administering Medications:
- How are clients monitored after administering medications?
- How are clients informed about their medications?
- What safety precautions are taken prior to administering medications?
- What are the challenges related to medication delivery devices, and how are the challenges addressed?
Priority Process: Medication Management
Description: Using interdisciplinary teams to manage the provision of medication to clients.

Specific Elements for Surveyors Surveying Organizations (Readiness Assessment):

- Asking clients about the medications they regularly take
- Safe medication handling.

Specific Instructions: Each Sector/Service Area

Note: These are elements that may be considered if your priority process activities take you to specific service areas related to medication management. It is not necessary to repeat the medication management tracer in each service area.

Medicine Services
- Collaborative approach
- Client education about medications
- Medication reconciliation

Emergency Department
- Collaborative approach
- Client information, e.g. allergies, weight
- Access to high risk medications
- Medication reconciliation

Long Term Care
- Collaborative approach
- Client and family involvement
- Pain assessment and management
- Client monitoring
- Medication reconciliation

Home Care
- Collaborative approach
- Medication reconciliation and Coordination with primary care physician, community pharmacy
- Timely access to medications
- Medication self-administration
- Client monitoring
- Medication reconciliation

Perioperative Services and Invasive Procedures Standards
- Collaborative approach
- Medication reconciliation and knowing what medications the client is taking prior to surgery
- Client education about medications
- Management of post-operative pain, post-operative nausea and vomiting (PSNV)

Community Health Services
- Collaborative approach
- Coordination with primary care physician, community pharmacy
- Timely access to medications
- Medication self-administration
- Client monitoring
- Medication reconciliation

Mental Health Services
- Collaborative approach
- Access to appropriate medications
- Safe medication administration (including self-administration)
- Client monitoring
- Medication reconciliation

Cancer Care & Oncology Services
- Collaborative approach
- Access to appropriate medications, including high risk drugs
- Body surface area (BSA) for chemotherapy
- Pain management
- Client monitoring
- Medication reconciliation

Obstetrics Services
- Collaborative approach
- Pain assessment and therapeutic management
- Weight-based dosing for pediatrics
- Medication reconciliation
**Priority Process: Medication Management**

**Description:** Using interdisciplinary teams to manage the provision of medication to clients.
- Transfer and instructions for post-operative care, including medications

---

**KEY SURVEY ACTIVITIES**

**TOUR OF THE PHARMACY**
1. Speak to pharmacists and pharmacy assistants/techs about their distinct roles and responsibilities.

2. Observe medication storage space and ask related questions (e.g. list of medications/formulary, standardized drug concentrations, sufficient storage space, storage conditions, hazardous chemicals and chemotherapy agents, lighting, medication packaging & labelling, separation of look alike-sound alike drugs, medications in ready-to-use format, medication security).

3. Observe and speak to team members about ordering and transcribing (e.g. CPOE or pre-printed order forms, access to up-to-date client information (including medication profile and allergy information), medication order transcription/review/double-checking.

4. Observe area(s) for medication preparation (e.g. workspace, lighting, interruptions, aseptic technique, laminar flow hood, USP standards to prevent contamination, process for spills, pharmacy documentation of medications prepared).

5. Observe the process for dispensing medications, including medication format (most ready to administer form), review policies, discuss quality control procedures to prevent dispensing errors, as well as procedures for medication transportation.

**CLINICAL TRACER(S)**
1. Review the files of clients that have had a medication incident or error in the last six months OR following a prescription from ordering medications to client monitoring after medication administration.

2. Select up to three (3) files based on:
   a. Representative sample of clients served by the organization
   b. Case complexity
   c. Severity of the incident or error (for medication incident tracer)

3. Review these files and become familiar with them. This includes:
   a. Client's medical history.
   b. Services received.
   c. Providers involved in service delivery.
   d. Events that preceded and followed the medication incident or error (for medication incident tracer).
**Priority Process:** Medication Management  
**Description:** Using interdisciplinary teams to manage the provision of medication to clients.

4. Plan the tracer by making a list of:  
   a. The providers to interview in the sector/service area.  
   b. The clients/families to talk to.  
   c. The questions to ask and issues to address.  
   d. Any documentation or additional files to review, including documentation/team member communications for medication information, drug alerts, training on medication delivery devices.

5. Carry out the tracer.

**One-on-One Interview: Clinical Leader or Administrator**

1. Select the most appropriate and available clinical leader or administrator in this service area.

2. Focus your questions on:  
   a. Processes related to medication ordering, preparation, administration, and quality monitoring.  
   b. Systems issues involving medication safety.

**Interview with Interdisciplinary Advisory Committee**

1. Speak to this committee or Director of Pharmacy or Nursing in a smaller organization.

2. Focus your questions on:  
   a. The process to add and remove medications from the organization’s medication list.  
   b. Preventing problems with medication packaging and labelling.  
   c. High risk/high alert drugs.  
   d. Systems issues involving medication safety.

**Telephone and/or In-Person Discussions: Individual Clients and Families**

1. Based on the client files identified and/or the clients currently in the organization receiving services, determine:  
   a. Which clients and families to speak to.  
   b. How to contact these clients, e.g. at the point of care, via telephone, etc.  
   c. Whether any logistics need to be arranged, i.e. telephone contact or client consent to be interviewed.

2. Focus your questions on:  
   a. Understanding the degree to client/family education related to medications.  
   b. Understanding the client’s involvement in medication safety.
**Priority Process:** Medication Management

**Description:** Using interdisciplinary teams to manage the provision of medication to clients.

**NOTES AND OBSERVATIONS**

Include:
- Additional questions
- Points of clarification/requests for additional documentation
- Similarities, inconsistencies, or points for follow-up
- Information that will be important to another priority process and/or surveyor