PROCEDURE FOR MAKING AMENDMENTS TO THE MTW / K&M WEST KENT HCP JOINT ELECTRONIC INTERFACE FORMULARY

Aim of Procedure

To ensure the e-formulary is updated in an accurate and timely fashion, so that it reflects published local and national drug guidance, new clinical information and decisions made by the following local and regional governance committees: -

- MTW Drugs Therapeutics and Medicines Management Committee (DTMMC)
- MTW Antimicrobial Steering Group (ASG)
- West Kent HCP Medicines Optimisation Group (MOG)
- K&M Integrated Medicines Optimisation Committee (IMOC)

Procedure

1. Addition of a new drug to the electronic formulary

1.1 All requests for new drug additions should be made to the MTW Principal Formulary Pharmacist or nominated deputy in their absence in accordance with the 'Procedure for requesting the addition of a new drug to the MTW/K&M West Kent HCP joint interface formulary'. All new drug requests must go to DTMMC and to MOG for approval if primary care is affected. A verdict of approval must be made by both committees as appropriate before a new drug is added to the e-formulary.

1.2 Any agreed new drug addition to the formulary should be noted and details entered into the excel 'formulary update worklist' saved in the formulary folder on the MTW pharmacy shared drive.

1.3 The only persons allowed to make amendments to the e-formulary are the MTW Principal Formulary Pharmacist and formulary support pharmacists who have received local training and password-protected access.

1.4 Before adding a new drug, the configuring pharmacist must check that there is a validating pharmacist available to perform validation (check) of the upload by the end of the same working day. If no one is available to validate in that timeframe, then the drug addition should be postponed until such time that there is someone available to check on the same day. This is because once a drug is imported it appears live on the system.

1.5 The configuring MTW Principal Formulary Pharmacist / formulary support pharmacist will log on to the administration section of the electronic formulary, which is password protected. They will import the drug with the relevant icons selected e.g. BNF, SPC, HCD as appropriate. Any supporting information/links should then also be added to the appropriate section and click 'save'. Just 'save' should be clicked and NOT 'save and publish' at this stage. The 'preview' button should be used to view changes and to ensure they are as intended on the front end of the system before logging off. The configuring pharmacist should enter their name into the 'added to formulary' column for that item on the formulary update worklist.

1.6 The validating formulary pharmacist / formulary support pharmacist (who has not performed the data upload) will logon to the administration section of the electronic formulary and go to the relevant section where the changes have

been made. They will click 'preview' and check the changes that have been made are safe and correct.

1.7 If changes are required, the validating pharmacist should note these in the formulary update worklist and inform the configuring pharmacist who will perform the changes if agreed and update accordingly. The validating pharmacist should then recheck the changes using the preview button.

1.8 Once the validating pharmacist is happy with the changes made, they should click 'save and publish' for the relevant section where the changes have been made. They should view the changes on the front end of the formulary to ensure change had been made as intended. They should then enter their name into the 'checked & published by' column on the formulary update worklist and move the row to the 'completed updates' section of the excel document.

2. Changes to the electronic formulary for links to national guidance/safety updates or short prescribing notes

2.1 All requests for changes should be made to the MTW Principal Formulary Pharmacist or nominated deputy in their absence. Requests can come from health professionals working within primary or secondary care. The formulary pharmacist will decide whether the requested changes need to go to DTMMC, MOG, IMOC or other consultation for wider discussion. Some minor changes may be appropriate without committee consultation (e.g. errors found or edits to links to updated national guidance/drug safety information).

2.2 Any agreed changes to the formulary should be noted and details entered into the excel 'formulary update worklist' saved in the formulary folder on the MTW pharmacy shared drive.

2.3 The configuring MTW Principal Formulary Pharmacist / formulary support pharmacist will log on to the administration section of the electronic formulary, which is password protected. They will add / edit the prescribing notes / links in the appropriate section and click 'save'. Just 'save' should be clicked and NOT 'save and publish' at this stage. The 'preview' button should be used to view changes and to ensure they are as intended on the front end of the system before logging off. The configuring pharmacist should enter their name into the 'added to formulary' column for that item on the formulary update worklist.

2.4 The validating formulary pharmacist / formulary support pharmacist (who has not performed the data upload) will logon to the administration section of the electronic formulary and go to the relevant section where the changes have been made. They will click 'preview' and check the changes that have been made are safe and correct.

2.5 If changes are required, the validating pharmacist should note these in the formulary update worklist and inform the configuring pharmacist who will perform the changes if agreed and update accordingly. The validating pharmacist should then recheck the changes using the preview button.

2.6 Once the validating pharmacist is happy with the changes made, they should click 'save and publish' for the relevant section where the changes have been made. They should view the changes on the front end of the formulary to ensure change had been made as intended. They should then enter their name

into the 'checked & published by' column on the formulary update worklist and move the row to the 'completed updates' section of the excel document.

3. Deletion of a drug or guideline from the formulary.

3.1 Requests for deletions should be made to the MTW Principal Formulary Pharmacist. The formulary pharmacist will decide whether the requested deletion can be made with/without wider consultation.

3.2 Follow the procedure as laid out in 2.2 – 2.6 except the configuring pharmacist and validating pharmacist can be the same person for the purposes of deletion.

3.3 A record of the reason for deletion should be entered in the comments section of the formulary update worklist 'completed updates' list.

4. Addition or change to a local prescribing guideline on the formulary.

4.1 All requests for guideline additions/substitutions on the formulary should be made by completing the change control record form (appendix A) and sending it to the MTW Principal Formulary Pharmacist or nominated deputy in their absence. Requests can come from MTW or designated K&M West Kent HCP pharmacists or technicians working within primary or secondary care.

4.2 All new local MTW drug guidelines should first be approved by DTMMC (or ASG in the case of antimicrobials) and all new local community drug guidelines should first be approved by IMOC and MOG before upload to the formulary and this should be documented clearly on the change control record form.

4.3 For guidelines coming from **MTW**, the change control record form should clearly state who has authored and who has clinically accuracy checked the final document content and these should be 2 different health professionals (at least one of whom must be a pharmacist). The clinical content should be checked by a pharmacist that works within the relevant specialist area that the guideline applies to where possible.

4.4 For guidelines coming from **West Kent HCP**, any guidelines sent that are documented on the change control form as having had a MOG or IMOC committee approval can be taken as having had a full content accuracy check as part of their approval process and therefore they do not require any further pharmacist content check at this stage before upload. A specific author also does not need to be stated if committee approval is noted.

4.5 For **all** guidelines sent, the change control form must clearly state who has performed the version control check for the inserted document(s) to ensure that it/they is/are the final and most recently approved, checked version(s).

4.6 The configuring MTW formulary pharmacist / formulary support pharmacist will log on to the administration section of the electronic formulary, which is password protected. They will add/substitute the guideline into the appropriate section and click 'save'. Just 'save' should be clicked and NOT 'save and publish' at this stage. The 'preview' button should be used to view changes and to ensure they are as intended on the front end of the system before logging off. The configuring pharmacist should enter their name into the 'uploaded

(configured) by' section on the change control record form and send it to the validating pharmacist.

4.7 The validating formulary pharmacist / formulary support pharmacist (who has not performed the data upload) will logon to the administration section of the electronic formulary and go to the relevant section where the changes have been made. They will click 'preview' and check the changes that have been made are safe and correct.
If further changes are required, the validating pharmacist should note these on the change control record form and send it back to the configuring pharmacist who will perform the changes if agreed and update accordingly. The validating pharmacist should then recheck the changes using the preview button.

4.8 Once the validating pharmacist is happy with the changes made, they should enter their name into the 'preview checked (validated) by' section on the change control record form and click 'save and publish' for the relevant section where the changes have been made. They should then enter their name into the 'published by' section on the change control record form. They should inform the requestor that this has been done and ask them to view the live changes on the front end of the formulary to ensure that they are happy. They should promptly inform the formulary pharmacist if there are any further problems.

4.9 The change control record form containing the new/updated guideline should be filed and saved electronically.

4.10 MTW formulary pharmacists will also keep a brief record of the change on the completed formulary updates spreadsheet.

5. Procedure for Dealing with any Errors found on the electronic interface formulary

5.1 Errors with information on the electronic formulary are unlikely to happen due to password controlled access to the system and adherence to strict checking procedures for the adding/editing of information. However, if any user comes across an error please notify the MTW pharmacy formulary team immediately with details of the error so that we can rectify it as soon as possible.

5.2 If the error is part of an uploaded guideline then the author/relevant specialist pharmacist will be asked to correct the guideline, recheck it and resend the correct version to the formulary team. A 'change control record form for guidelines' (Appendix A) should be used for this with the corrected checked version inserted as an object into the form.

5.3 If an error is identified outside of normal pharmacy working hours, and the next working day is more than 24 hours away, and it is deemed that an urgent correction is required then please contact the TWH on-call pharmacist. If they agree with the urgency then they should try to contact a MTW formulary pharmacist. If it is not possible to contact a formulary pharmacist then the on-call pharmacist should logon to the online configuration editor for the interface formulary. The drug or guideline with the error should be temporarily unpublished or removed from the site by following the instructions in the user guide provided for on-call pharmacists. The formulary pharmacist should then be informed immediately on the next working day.

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MTW / K&M West Kent HCP Joint Formulary Website

Change Control Record Form for Guidelines

Requesting pharmacist or technician to complete	
Requestor	Name: Designation: Organisation: Date:
Name(s) of guideline(s) to be uploaded *(can be multiple if relevant to same area)*	
Insert final checked guideline document(s) that is/are ready for upload here *(insert document **as an object**)*	
Name(s) of any guidelines to be removed when this is uploaded *(state 'none' if none to remove)*	
Committee Approval *If this is **not** a new guideline and it is deemed that this version does not need to go back to committee please briefly state why here (e.g. minor typographical changes)*	Name(s) of committee(s): Date(s) of approval:
Guideline Author *(complete for MTW docs only)*	Name: Designation: Date:
Content Clinical Check *(complete for MTW docs only - name of pharmacist who has accuracy checked the final inserted document(s))*	Name: Designation: Date:
Version Check *(confirmation that the inserted document(s) is/are the most recently approved version(s))*	Name: Designation: Date:

Formulary team to complete	
Change number	
Uploaded to site (configured) by	Name: Designation: Date:
Preview checked (validated) by	Name: Designation: Date:
Changes identified at validation	Yes / No If yes specify:
Published by	Name: Designation: Date: