MSOS Member Briefing September 2020

Moderated by: E. Robert Feroli, PharmD, FASHP





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Nonsterile Compounding Medication Event

CASEY MOORE, PHARMD

MEDICATION SAFETY PHARMACIST- PEDIATRICS

CLEVELAND CLINIC

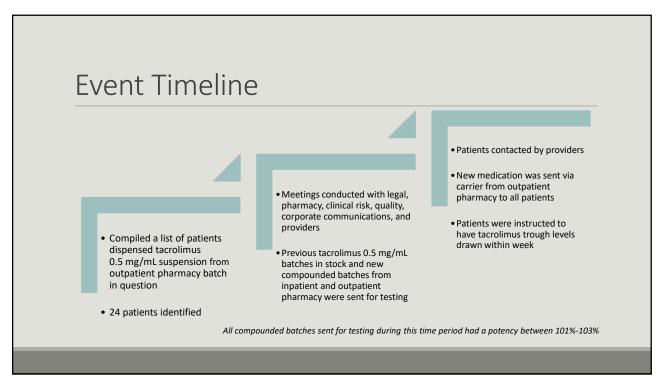


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Prescription dispensed to index patient using tacrolimus 0.5 mg/mL compounded suspension Index patient tacrolimus level < 2.0 (trough goal 5-7 ng/mL) Index patient/caregiver returned tacrolimus 0.5 mg/mL suspension dispensed for testing Index patient specific tacrolimus 0.5 mg/mL bottle resulted in 32% (0.16 mg/mL) potency Medication Safety Director notified and reported in safety event reporting system

Immediate Actions

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Root Cause Analysis

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Root Causes and Contributing Factors

| Root Cause | Contributing Factor |
|-------------------------------------|--|
| Medication Preparing /Distributing | The process used to compound the tacrolimus oral suspension was considered sufficient but a better process exists per Professional Compounding Centers of America (PCCA) |
| Medication Labeling | A "shake well" sticker was not applied to the large stock bottle after it was compounded, so was likely not shaken upon dispensing patient specific doses |
| Providing Patient Education | Patient education not sufficiently specified for the medication in the outpatient pharmacy setting |
| Inadequate Policies and Procedures | Lack of quality assurance (QA) process for nonsterile compounded product(s) so pharmacy was unaware that compounded product had low potency prior to dispensing |
| Human Factors: Staffing Skill Mix | Lack of knowledge by staff present on how to send out medication for testing |
| Communication Amongst Caregivers | Escalation of the issue did not occur, preventing quicker intervention by providers through additional lab tests |
| Communication Amongst Caregivers | No process for providers to check with pharmacy about product when patient's levels come back sub or supratherapeutic |
| Medication Formulary | Compounded tacrolimus oral suspension has been known to have varying potencies even when prepared appropriately |

Corrective Action Plan

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Corrective Action Plan

Overview

Update compounding processes to align with best practices per USP 795 and standardize to all areas where nonsterile compounding occurs

Apply "shake well" auxiliary labelling on stock bottles and compounding worksheets as well as signage in storage areas; Consider using agitators or other equipment to standardize shaking bulk bottles prior to filling patient-specific doses

Implement prompts at point-of-sale with each fill to counsel patient on the need to shake product very well prior to every dose administration

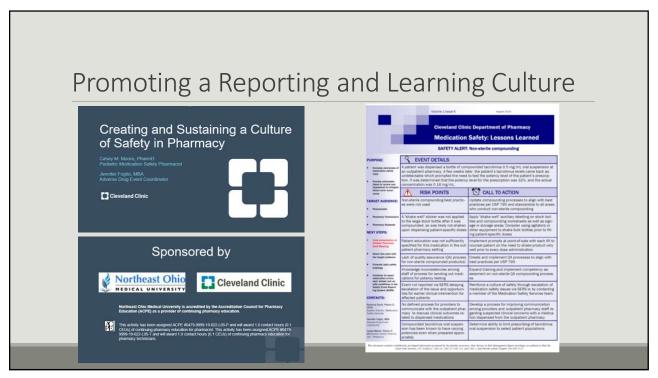
Create and implement QA processes to align with best practices per USP 795 $\,$

Expand training and implement competency assessment on nonsterile QA compounding processes

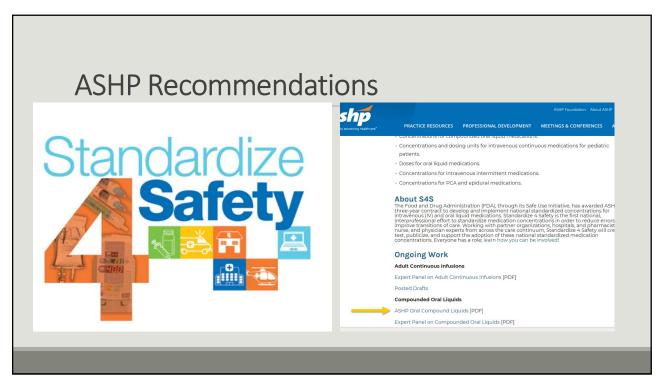
Reinforce the importance of escalating medication safety issues and using error reporting system so that the medication safety team, providers, and clinical risk can be aware and involved as needed

Develop a process for improving communication among providers and pharmacy staff regarding suspected issues with a medication dispensed from the outpatient pharmacy

Encourage transition from compounded suspension to capsules



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Concentration Change

0.5 mg/mL to 1 mg/mL

- ✓ 1 mg/mL concentration provides a straight forward dose to volume ratio for patient and caregivers
 when drawing up medications
- ✓ Patient education will be simpler with the 1 mg/mL concentration and communication with patients and caregivers over the phone regarding dose changes will be safer
- ✓ Regionally and nationally inpatient and outpatient pharmacies are being urged to standardize to one concentration, 1 mg/mL, for safety as patients frequently transfer care between institutions and/or pharmacies
- ✓ Beyond Use dating is longer with 1 mg/mL recipe (132 days verses 56 days)

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Failure Mode Lessons Learned

- ✓ Use signage and labeling to reinforce shaking compounded suspensions prior to dispensing
- ✓ Prescribe manufactured liquids or tablets/capsules when possible

Secondary Lessons Learned

- ✓ Standardization of non-sterile compounding and quality assurance processes is vital
- ✓ When a medication event is suspected or occurred, immediately report through internal system and escalate as needed
- ✓ Increase awareness of second victims throughout process while also focusing on patient needs

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Questions?



System Change Reports

Eileen Kasda, DrPH, MHS Assistant Director, Patient Safety Analytics

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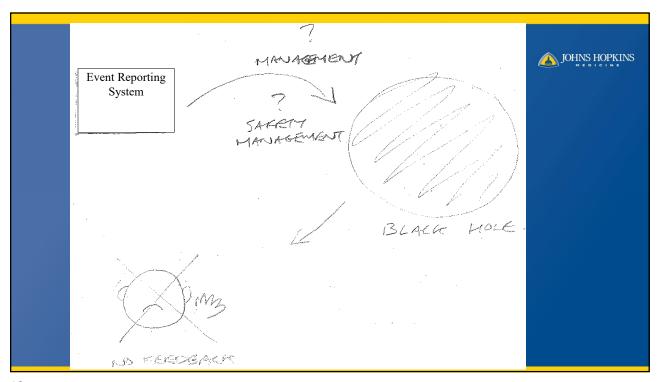
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Redonda Miller President of The Johns Hopkins Hospital



"Throughout my career at Johns Hopkins, I have served in many roles, including Vice Chair for Clinical Operations, Vice President for Medical Affairs, and since July 2016, as President of The Johns Hopkins Hospital. In each of these roles, one of my areas of responsibility has been patient safety. Consequently, I have had the opportunity over many years to work closely with our Medication Safety Officers (MSOs). With this collaboration, I have always been impressed by their specialized understanding of the medication-use system and the many medication-related error mechanisms encountered in our complex hospital environment. Their ability to use this knowledge to implement system changes across many disciplines has led to improved patient safety throughout our institution. While it is not possible to calculate the savings associated with their efforts, I have no doubt that our MSOs are a cost effective and valuable asset, and without them, our ongoing patient safety efforts would be at a disadvantage."

(ISMP White Paper: Case for Medication Safety Officers)



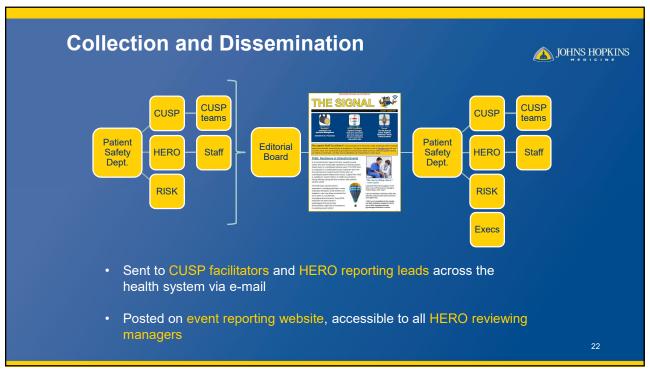
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Why Have a System Change Report

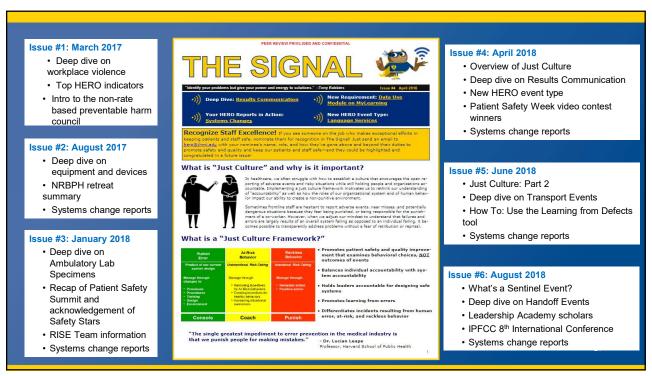


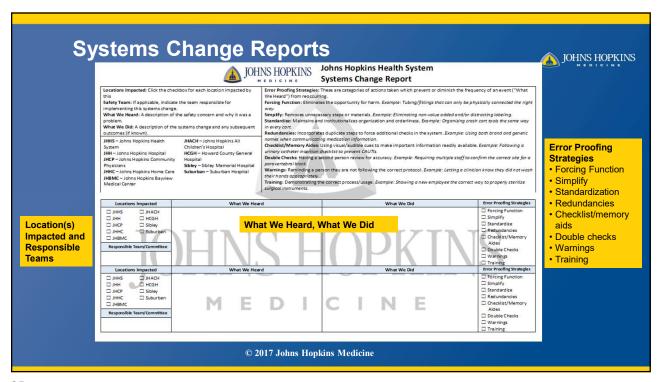
- Debunk the black hole myth with frontline staff
- Learning from HROs, provide transparency into improvement efforts is part of an important enabling infrastructure
- · Systems are flawed and constantly changing
- Identifying and correcting system flaws is an ongoing effort
- Tool to educate senior leadership about your efforts

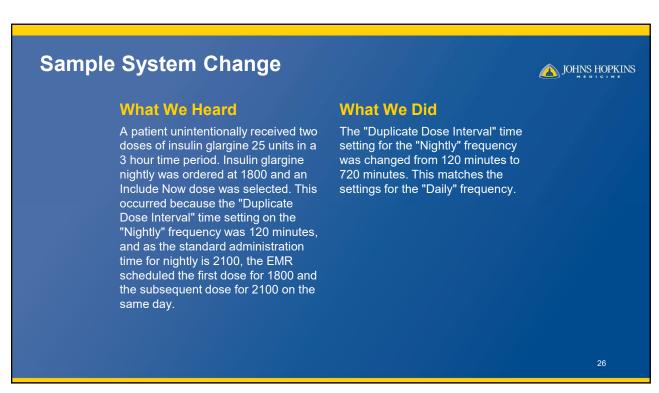












Lessons Learned



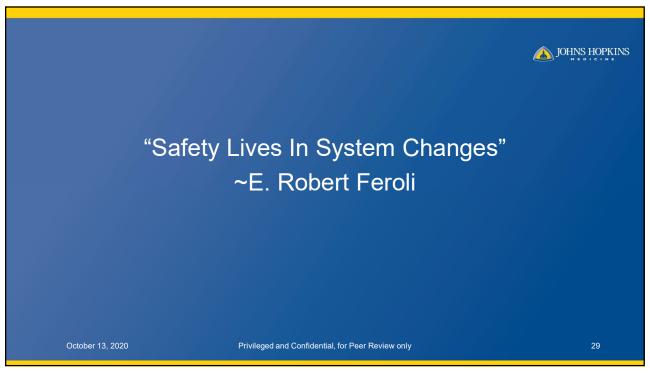
- Keep it simple and clear through the use of standardized template
- · Consider the audience for your system change reports
- Don't include changes that haven't been implemented as they may never be implemented and will decrease credibility
- More changes isn't necessarily better, be careful what you incentivize and make substantive changes
- Avoid using jargon that may make sense at the sharp end but not to a senior leader and vice versa
- To support peer review privileged protections, partner with legal on plan for report design and dissemination
- Collect feedback about the usefulness of the report and iterate

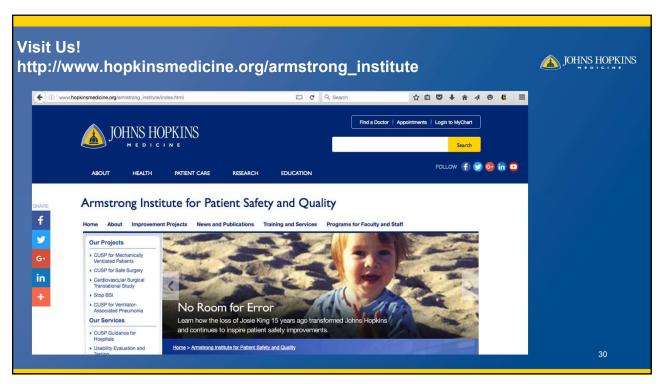
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Challenges



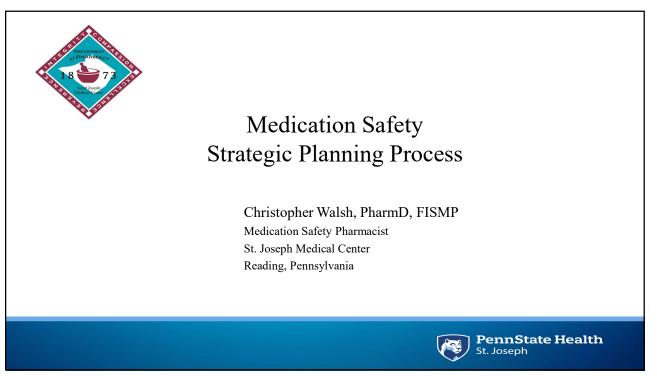
- Different interpretations on what meets criteria for a system change
- Different perceptions on the error proofing strategies used
- Striving for higher-level system changes is hard work
- Dissemination due to peer review privileged information
- · Quantifying the value and impact of changes implemented







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Learning Objectives

- Discuss benefits of strategic planning for medication safety
- Review process for designing a medication safety strategic plan
- Review an example of a medication safety strategic plan



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Strategic Planning Benefits

- Balance between short-term needs and long-term goals of the organization
- Formally identify specific medication safety strategic initiatives
- Establishes a framework for tracking progress toward the medication safety goal

"Pathways for Medication Safety - Leading a Strategic Planning Effort" (available at https://www.ismp.org/resources/strate
)
Vaida A, Kurcher L. Practical tools for medication safety in acute care. J Am Pharm Assoc. 2003 Sep-Oct;43(5 Suppl 1):548-9.



Steps to Strategic Planning

- Involve key people
- Assess your current position
- Map a strategy for the future
- Select change projects
- Implement strategic plan
- Monitor performance

Pathways for Medication Safety - Leading a Strategic Planning Effort" (available at) aida A, Kurcher L. Practical tools for medication safety in acute care. J Am Pharm Assoc. 2003 Sep-Oct;43(5 Supp



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Involve Key People

- Establish a core team
 - Informal leaders from the front line
 - Senior administrative leaders
 - Physicians and high-level managers
 - Medication safety team or similar
- Review a sample plan

Vaida A, Kurcher L. Practical tools for medication safety in acute care. J Am Pharm Assoc. 2003 Sep-Oct;43(Suppl 1):548-9.



Assess your current position

- · Medication error reporting systems
- Interventions by pharmacists, nurses, or physicians
- ISMP Self Assessment surveys
- Failure Mode and Effects Analysis
- Root Cause Analysis
- Staff or patient focus groups



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Assess your current position

- · Do not spend too much time
- · Prioritize time and energy
 - Reviewing the model plan;
 - Mapping an organization-specific strategy;
 - Implementing it; and
 - Monitoring the progress.
- Avoid data paralysis
- Can determine medication safety opportunities in a relatively short period of time.



Map a strategy for the future

- Core team selection of medication safety long term goals
 - Can be different from model plan
- Documentation of enduring advantages, barriers and boundaries
- Each goal is manageable and achievable
 - Important to select what not to do vs what to do



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Select change projects

- For each long term goal, select change projects
 - Challenge the organization
 - Facilitate achievement of the long-term goal
 - Be measurable and realistic (i.e. "SMART")
 - Identify responsible party



Prioritizing Projects

- Puts emphasis where needed, even if changes are difficult
- Proactively handles high impact issues
- Takes external influences into account without losing focus
- Takes considered risks



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Implement Strategic Plan

- Communication plan
- Leadership discussions with staff
 - Review new roles and responsibilities with affected staff.
 - Invest in training staff in new skills that may be needed to achieve the goals.
 - Establish a feedback mechanism and
 - Encourage comments and suggestions from staff and patients.

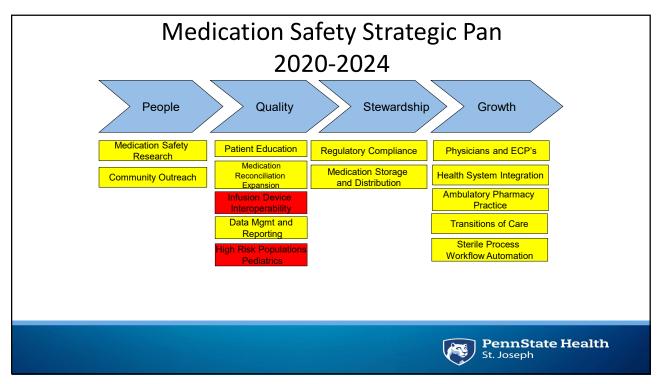


Monitor Performance

- Timetable to periodically review
- · Realistic assessments and flexibility
- Feedback from staff
 - how the change project is affecting jobs and patients



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| People | | | | | | | |
|------------------------|--|--|---|------|---|--|--|
| AREA | Current State | Idealized State | Actions | Lead | Third Qtr 2020 Update | | |
| Community Relations | Medication safety information and education for community members Working with community groups | Community constituents at all ages and ethnic groups look to SJMC for medication safety information and education | Explore opportunities with colleges/ nursing schools for education and medication safety programs Embed clinical pharmacists in primary care practice sites (Structure Measure #clinical pharmacists/#primary practices) | | Completed – Integrated into TUSP certificate program faculty; In Process – Pharmacy residency clinic at downtown residency practices 1 afternoon per week | | |
| Research | Publishable research on medication use at SJMC is limited to mainly pharmacy residents with descriptive statistics due to lack of statistical support. | Expanded professional research opportunities at SJMC for properly powered, publishable material in peer-reviewed journals. | Identify broad areas needed for medication use research throughout Penn State Health and share resources as needed to expand development of publishable material. (Measure:#medication safety related research protocols completed) | | In Progress – Joint research training completed and biostatistician resource acquired and resourced | | |



| Quality | | | | | | | | |
|------------------------------|--|--|--|------|---|--|--|--|
| AREA | Current State | Idealized State | Actions | Lead | Third Qtr 2020 Update | | | |
| Patient Education | Room for improvement in patient satisfaction scores Basic information given, but not always explained, patients with multiple meds report confusion with information No tool available to identify patients at risk of adverse drug events. Non-specific ADE tool (LACE) utilized to guide use of limited pharmacy patient discharge counseling resources. | Utilizing a tool to specifically identify patients at high risk for ADE, identify patients who will be educated by pharmacy staff on all new and discharge medications via teachback methodology. Education session to be recorded for future reference utilizing Good To Go program | Develop and implement a tool that specifically identifies patients at high risk for ADE's. Implement pharmacy based discharge counseling and education on 1 unit piloting ADE risk assessment tool and expand as warranted. Readmission rates due to preventable adverse drug events (Outcome Measure) Patient satisfaction scores for medications (Outcome Measure) Rate of "Good to Go" recordings per unit of discharges (Process Measure) | | In progress – ADE risk tool developed but not tested; In progress – Meds to beds program limited due to restriction against mobile devices at bedside | | | |
| Medication reconciliation | Formalized process identified that includes 3 FTE's dedicated to admission medication reconciliation. Discharge reconciliation process completed that includes patient-friendly medication list and instructions. No formal transitions of care (TOC) process to compare discharge medication list with discharge note from hospital provider and discharge prescriptions. | Full medication reconciliation at all patient transitions with complete reconciliation of medication instructions and prescriptions upon discharge. | Number of admission medication histories performed by medication history technician (Outcome Measure). Policies and procedures updated to include MHT position(Structure Measure). Completed discharge medication lists that are properly updated (Process Measure). Compliance with TJC NPSG for medication reconciliation (Process Measure). | | Completed – 2.5 MHT FTE's in ED and 1 FTE added to SPU; In progress – Comparison of lists vs prescriptions – Pilot 9/2020 | | | |



QUESTIONS?



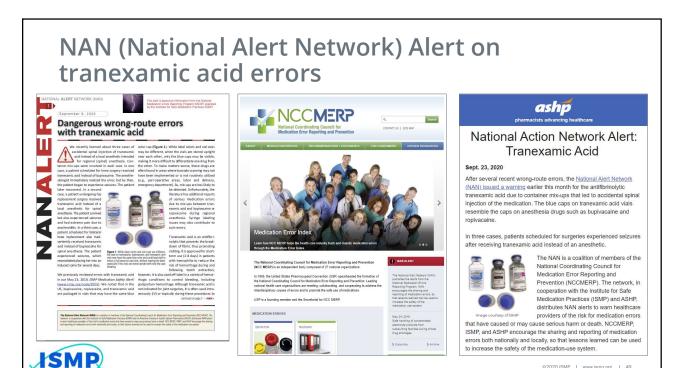
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ISMP Update MSOS Briefing September 2020

Michael R. Cohen, RPh, MS, ScD (hon.), DPS (hon.), FASHP President, Institute for Safe Medication Practices

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ISMP Self Assessment for Perioperative Settings

FDA Broad Agency Announcement (BAA)

- Meeting to be held with FDA to show the document and receive any input
- Pilot testing near completing and on target for October tool release





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Media

- Uppsala Reports article on tragedy after 2-component vaccine error in Samoa
- Written by ISMP Fellows with staff oversight





https://www.uppsalareports.org/articles/serious-errors-with-two-component-vaccines-risk-harm-and-damage-trust/



ISMP Nurse AdviseERR





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https://www.ismp.org/newsletters/nursing

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ECRI and the ISMP PSO

- Over a decade of experience as a PSO accredited by AHRQ
 - More than 3.7 million events in database, including >13,000 COVID-related events
- Experienced staff with backgrounds in medicine, pharmacy, nursing, risk management, patient safety and quality improvement (many with CPPS, CPHQ or CPHRM certifications)
 - Access to additional expertise, such as engineers, human factors specialists, librarians, supply chain specialists, etc.





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ECRI and the ISMP PSO

- Joint PSO between ECRI and ISMP provides
 - Unique expertise in medication safety
 - Access to long-term leaders in the field
- ECRI ISMP PSO has extensive experience in different healthcare markets (acute care, aging services, federally qualified health centers, specialty groups)





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ECRI and the ISMP PSO

- Medication safety issues are typically one of the top three patient safety issues reported to PSOs
- ISMP multidisciplinary staff plus ECRI experts available to help PSO members
- The two combined PSOs increase medication safety expertise and resources
- To learn more about ECRI and the Institute for Safe Medication Practices PSO, or to request a demo, visit https://www.ecri.org/pso, call (610) 825-6000, or e-mail clientservices@ecri.org. Or contact us at ismpinfo@ismp.org.





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Questions?



- A copy of today's slides will be posted on our website
- Next MSOS Briefing date November 19, 2020.
 Register:

https://ecri.zoom.us/webinar/register/WN_loWq1CLwQ46GCmie6oYWUA

