

Pharmacy technician Structured Practical Training Assessment form¹



Provisional Pharmacy Technician Name	Registration Number	SPT Level I II III
Signature		
Preceptor Name	Registration Number	Date
Signature		

RATING SCALE	
Needs improvement	1 - can demonstrate, but only with support
	2 - can demonstrate, but frequently requires support
Acceptable	3 - can demonstrate with confidence; sometimes needs support
	4 - can demonstrate; rarely needs support
No opportunity	N/O – unable to demonstrate due to no opportunity

Competency

Rating

1.0 Ethical, legal, and professional responsibilities

circle one

1.1	Practice within legal responsibilities					
1.1.1	Apply legal requirements to practice, including federal and provincial/territorial legislation, policies, by-laws, and standards	1	2	3	4	N/O
1.1.2	Apply federal and provincial/territorial workplace, occupational health and safety, and other related legislation to the practice setting	1	2	3	4	N/O
1.1.3	Apply federal and provincial/territorial privacy legislation to the collection, use, storage, disclosure, and destruction of personal health information.	1	2	3	4	N/O
1.2	Uphold ethical principles					
1.2.1	Demonstrate personal and professional integrity.	1	2	3	4	N/O
1.2.2	Apply ethical principles in the decision-making process	1	2	3	4	N/O
1.3	Manage actual and potential illegal, unethical, or unprofessional actions or situations in practice					
1.3.1	Identify illegal, unethical, or unprofessional actions or situations.	1	2	3	4	N/O
1.3.2	Undertake appropriate intervention to address illegal, unethical, or unprofessional actions or situations	1	2	3	4	N/O
1.4	Apply principles of professionalism					
1.4.1	Apply principles of self-regulation	1	2	3	4	N/O
1.4.2	Accept responsibility and accountability for own actions and decisions	1	2	3	4	N/O
1.4.3	Seek guidance when uncertain about own knowledge, skills, abilities, and scope of practice	1	2	3	4	N/O
1.4.4	Apply principles of continuing professional development including assessing own learning needs and developing a plan to meet these needs	1	2	3	4	N/O
1.4.5	Maintain appropriate professional boundaries	1	2	3	4	N/O
1.4.6	Protect the privacy and confidentiality of the patient	1	2	3	4	N/O
1.4.7	Manage situations of actual and perceived conflict of interest	1	2	3	4	N/O
1.4.8	Describe the Canadian health care system and the role of health professionals within it	1	2	3	4	N/O
1.5	Document activities of practice in compliance with federal and provincial/territorial legislation, standards, and policies					
1.5.1	Maintain complete, accurate and secure patient records	1	2	3	4	N/O
1.5.2	Identify situations in which documentation should and should not be shared with other health professionals or third parties	1	2	3	4	N/O
1.5.3	Select appropriate methods to share documentation within the circle of care and facilitate patient care.	1	2	3	4	N/O

¹ The pharmacy technician Structured Practical Training assessment form is to be used by the learner and preceptor for assessment at the beginning ("self-assessment") and at the completion of each level.

2.0 Patient care

2.1	Develop a professional relationship with the patient					
2.1.1	<i>Establish and maintain rapport by using effective communication skills.</i>	1	2	3	4	N/O
2.1.2	<i>Demonstrate a caring, empathetic, and professional attitude</i>	1	2	3	4	N/O
2.1.3	<i>Determine and acknowledge the patient's needs, values, and desired level of care</i>	1	2	3	4	N/O
2.1.4	<i>Identify and respect the roles and responsibilities of each party in the relationship</i>	1	2	3	4	N/O
2.2	Obtain patient information for pharmacist review					
2.2.1	<i>Gather information from the patient using appropriate interview techniques, including active listening</i>	1	2	3	4	N/O
2.2.2	<i>Identify factors such as culture, language, demographic, and physical characteristics that may impact the patient's care.</i>	1	2	3	4	N/O
2.2.3	<i>Gather information from the patient's health records</i>	1	2	3	4	N/O
2.2.4	<i>Gather information required for medication reconciliation</i>	1	2	3	4	N/O
2.2.5	<i>Measure the patient's physical parameters such as height, weight, and blood pressure</i>	1	2	3	4	N/O
2.2.6	<i>Organize, reconcile, and record the patient's information</i>	1	2	3	4	N/O
2.3	Collaborate with the pharmacist to support care plan activities					
2.3.1	<i>Identify patient needs related to issues such as dosage forms, special packaging, or labelling</i>	1	2	3	4	N/O
2.3.2	<i>Assist the patient in making informed decisions regarding the selection and use of drug administration devices, monitoring devices and health aids</i>	1	2	3	4	N/O
2.3.3	<i>Gather monitoring parameter information for pharmacist review, including adherence information and lab test results</i>	1	2	3	4	N/O
2.3.4	<i>Communicate relevant information and identified concerns to the pharmacist in a clear, concise, and timely manner</i>	1	2	3	4	N/O

3.0 Product distribution

3.1	Receive, interpret, and process a prescription					
3.1.1	<i>Determine the validity, clarity, completeness, and authenticity of the prescription and resolve concerns in collaboration with the pharmacist</i>	1	2	3	4	N/O
3.1.2	<i>Transcribe verbal orders and ensure their accuracy</i>	1	2	3	4	N/O
3.1.3	<i>Transfer a prescription and receive a transferred prescription</i>	1	2	3	4	N/O
3.1.4	<i>Interpret numerals, symbols, measurement systems and Latin abbreviations</i>	1	2	3	4	N/O
3.1.5	<i>Perform pharmaceutical calculations</i>	1	2	3	4	N/O
3.1.6	<i>Identify patterns of unusual drug prescribing and usage including possible diversion or drug misuse and report relevant findings to the pharmacist or appropriate authority</i>	1	2	3	4	N/O
3.1.7	<i>Process the adjudication for payment of prescriptions and other pharmacy services using knowledge of third-party payer policies and formularies</i>	1	2	3	4	N/O
3.2	Prepare products for dispensing					
3.2.1	<i>Select appropriate products by applying knowledge of brand and generic names, dosages, and dosage forms.</i>	1	2	3	4	N/O
3.2.2	<i>Apply drug interchangeability principles in accordance with applicable formularies, policies, or legislation</i>	1	2	3	4	N/O
3.2.3	<i>Verify the integrity of a product by considering stability, and, where applicable, sterility, including checking expiry dates, physical appearance, and odour.</i>	1	2	3	4	N/O
3.2.4	<i>Measure products by counting, pouring, or weighing using the appropriate equipment and technology</i>	1	2	3	4	N/O
3.2.5	<i>Package products in a suitable container to maintain product integrity, stability, and, where applicable, sterility</i>	1	2	3	4	N/O
3.2.6	<i>Use packaging that is safe and appropriate for the patient, including pre-packaging, multi-dose or unit dose packaging and child-resistant vials.</i>	1	2	3	4	N/O
3.2.7	<i>Label products according to legislative requirements, best safety practices, established protocols and patient-specific needs</i>	1	2	3	4	N/O
3.3	Prepare and compound non-sterile and sterile products according to recognized guidelines and standards of practice.					
3.3.1	<i>Perform compounding calculations</i>	1	2	3	4	N/O
3.3.2	<i>Prepare and compound sterile products according to recognized guidelines and standards of practice</i>	1	2	3	4	N/O
3.3.3	<i>Prepare and compound non-sterile products according to recognized guidelines and standards of practice</i>	1	2	3	4	N/O
3.4	Verify the technical aspects of the prescription to ensure accuracy and quality of products					
3.4.1	<i>Identify when an independent double check should be performed</i>	1	2	3	4	N/O

3.4.2	<i>Check the product and its prescription label against the prescription using a systematic approach</i>	1	2	3	4	N/O
3.5	Collaborate with the pharmacist in the release of the product					
3.5.1	<i>Determine whether the legal and professional requirements for a product to be released to the patient have been met</i>	1	2	3	4	N/O
3.5.2	<i>Identify when the patient requires further consultation or education from the pharmacist</i>	1	2	3	4	N/O
4.0 Practice setting						
4.1	Optimize the safety, efficacy, and efficiency of operations in the practice setting					
4.1.1	<i>Demonstrate the organizational and time management skills necessary to effectively prioritize, organize and manage product distribution workflow</i>	1	2	3	4	N/O
4.1.2	<i>Supervise pharmacy support personnel so that accepted standards are met</i>	1	2	3	4	N/O
4.1.3	<i>Use and maintain automation and other technology to enhance safety, efficacy, and efficiency in the practice setting</i>	1	2	3	4	N/O
4.2	Contribute to the management of pharmacy inventory to ensure safe, effective, and efficient product distribution					
4.2.1	<i>Apply inventory and formulary management systems and strategies that incorporate best practices, including new technologies</i>	1	2	3	4	N/O
4.2.2	<i>Prepare and place orders for stock and supplies, using appropriate technology, from licensed and legitimate sources</i>	1	2	3	4	N/O
4.2.3	<i>Identify issues with the drug supply chain, including drug shortages and drug recalls, and collaborate with the pharmacist to resolve these issues</i>	1	2	3	4	N/O
4.2.4	<i>Return or properly dispose of recalled, expired and unusable products</i>	1	2	3	4	N/O
4.2.5	<i>Reconcile inventory for controlled substances, or any other substances selected</i>	1	2	3	4	N/O
4.2.6	<i>Investigate inventory discrepancies and communicate findings to the pharmacist and/or other appropriate authority</i>	1	2	3	4	N/O
4.3	Contribute to the management of record keeping activities within the practice setting					
4.3.1	<i>Use appropriate information technology to organize, maintain and retrieve pharmacy records</i>	1	2	3	4	N/O
4.3.2	<i>Use information technology and record-keeping procedures that maintain the integrity, security, and permanence of pharmacy records.</i>	1	2	3	4	N/O
5.0 Health promotion						
5.1	Support patient specific health promotion activities in collaboration with the pharmacist					
5.1.1	<i>Identify and inform the pharmacist of socio-economic, cultural, environmental, and other factors that are barriers to, or facilitators of, health and wellness for the patient.</i>	1	2	3	4	N/O
5.1.2	<i>Gather health promotion information relevant to the patient</i>	1	2	3	4	N/O
5.1.3	<i>Participate in health promotion activities in collaboration with the pharmacist</i>	1	2	3	4	N/O
5.1.4	<i>Facilitate the patient's access to and interaction with support agencies and health services within the healthcare system</i>	1	2	3	4	N/O
5.2	Support public health activities in collaboration with the pharmacist					
5.2.1	<i>Identify factors that are barriers to, or facilitators of, public health and wellness</i>	1	2	3	4	N/O
5.2.2	<i>Participate in public health initiatives in collaboration with the pharmacist.</i>	1	2	3	4	N/O
5.2.3	<i>Participate in organized initiatives for disaster, pandemic, and emergency preparedness.</i>	1	2	3	4	N/O
5.3	Contribute to the maintenance of a healthy environment for the public					
5.3.1	<i>Promote the proper handling and disposal of drugs and hazardous materials with the patient, self, and others</i>	1	2	3	4	N/O
5.3.2	<i>Identify and minimize the risk of disease transmission from the pharmacy environment.</i>	1	2	3	4	N/O
6.0 Knowledge and research application						
6.1	Respond to questions that do not require pharmacist referral using appropriate strategies					
6.1.1	<i>Clarify requests for information to identify questions that require pharmacist referral</i>	1	2	3	4	N/O
6.1.2	<i>Use a variety of retrieval techniques to access reliable and appropriate information, including evidence-based information when possible</i>	1	2	3	4	N/O
6.1.3	<i>Organize and provide information using strategies appropriate to the target audience</i>	1	2	3	4	N/O
6.2	Apply relevant information to practice					
6.2.1	<i>Gather new information, including evidence-based information when possible, that may be applicable to practice.</i>	1	2	3	4	N/O
6.2.2	<i>Evaluate the information and use current, relevant, and reliable information to improve practice.</i>	1	2	3	4	N/O

7.0 Communication and education

7.1	Establish and maintain effective communications.					
7.1.1	<i>Demonstrate proficiency in written and verbal English or French</i>	1	2	3	4	N/O
7.1.2	<i>Demonstrate appropriate verbal and non-verbal communication skills, including listening skills</i>	1	2	3	4	N/O
7.1.3	<i>Demonstrate appropriate interview techniques</i>	1	2	3	4	N/O
7.1.4	<i>Select appropriate communication and education techniques for use with the patient and other health professionals</i>	1	2	3	4	N/O
7.1.5	<i>Conduct interpersonal interactions, including conflict management, in a professional manner</i>	1	2	3	4	N/O
7.1.6	<i>Communicate with sensitivity, respect, and empathy</i>	1	2	3	4	N/O
7.2	Use safe, effective, and consistent communication systems					
7.2.1	<i>Use communication techniques that maximize safety and understanding, including repeating back verbal orders, using recognized terminology, and avoiding unnecessary or unsafe abbreviations</i>	1	2	3	4	N/O
7.2.2	<i>Record and store information in a consistent manner for efficient access and retrieval by relevant personnel</i>	1	2	3	4	N/O
7.2.3	<i>Select appropriate technology to facilitate communication.</i>	1	2	3	4	N/O

8.0 Intra and inter-professional collaboration

8.1	Create and maintain collaborative professional relationships					
8.1.1	<i>Identify potential collaborators with whom to initiate ongoing professional relationships</i>	1	2	3	4	N/O
8.1.2	<i>Collaborate with other parties in the relationship to define the roles and responsibilities of each party</i>	1	2	3	4	N/O
8.2	Contribute to the effectiveness of working relationships in collaborative teams					
8.2.1	<i>Interact respectfully with other members of the team by accepting accountability for themselves and managing disagreements and conflict.</i>	1	2	3	4	N/O
8.2.2	<i>Share decision-making activities with other members of the team</i>	1	2	3	4	N/O
8.3	Participate in the delivery of collaborative health services in collaboration with the pharmacist					
8.3.1	<i>Collaborate with team members to ensure appropriate utilization of resources.</i>	1	2	3	4	N/O
8.3.2	<i>Collaborate with team members to determine and achieve team goals and objectives</i>	1	2	3	4	N/O
8.3.3	<i>Facilitate continuity of care</i>	1	2	3	4	N/O
8.4	Accept referrals from and make referrals to the pharmacist					
8.4.1	<i>Recognize situations that fall beyond the scope of practice of pharmacy technicians and refer these situations to the pharmacist</i>	1	2	3	4	N/O
8.4.2	<i>Accept responsibility for referrals from the pharmacist</i>	1	2	3	4	N/O

9.0 Quality and safety

9.1	Contribute to a culture of patient safety					
9.1.1	<i>Apply principles of patient safety to improve practice</i>	1	2	3	4	N/O
9.1.2	<i>Employ best practices when informing the patient of the occurrence of a medication incident.</i>	1	2	3	4	N/O
9.1.3	<i>Share information about problems, resolutions, system changes and lessons learned with the workplace team.</i>	1	2	3	4	N/O
9.2	Contribute to continuous quality improvement and risk management activities related to the drug distribution system					
9.2.1	<i>Apply principles of continuous quality improvement to practice</i>	1	2	3	4	N/O
9.2.2	<i>Apply principles of risk management to practice by anticipating, recognizing, and managing situations that place the patient at risk</i>	1	2	3	4	N/O
9.2.3	<i>Identify the occurrence of a medication incident or close call and respond effectively to mitigate harm and prevent reoccurrence</i>	1	2	3	4	N/O
9.2.4	<i>Identify high-alert drugs and high-risk processes in order to respond effectively</i>	1	2	3	4	N/O
9.3	Ensure the quality, safety, and integrity of products					
9.3.1	<i>Maintain the cleanliness, functionality and integrity of compounding, packaging, dispensing, and storage equipment</i>	1	2	3	4	N/O
9.3.2	<i>Ensure that products are stored and transported under the conditions required to maintain product quality, safety, and integrity, including cold chain management.</i>	1	2	3	4	N/O
9.3.3	<i>Evaluate the quality of supplies and products using recognized quality assurance techniques including visual inspection, verification of the legitimacy of the supplier and use of manufacturers' quality markers</i>	1	2	3	4	N/O
9.4	Create and maintain a working environment that promotes safety					
9.4.1	<i>Minimize and manage distractions in the work environment</i>	1	2	3	4	N/O

9.4.2	<i>Manage factors that affect personal wellness including work-life balance, sleep deprivation and physical and emotional health</i>	1	2	3	4	N/O
9.4.3	<i>Identify factors that impact the safety of the working environment, including resource allocation, procedural consistency, and ergonomics.</i>	1	2	3	4	N/O
9.4.4	<i>Handle hazardous products safely by minimizing personal exposure and reducing environmental contamination.</i>	1	2	3	4	N/O

Comments:

Areas of strength

Areas for improvement