

# Medicines Management Toolkit



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# Introduction

At Florence, we have a clear mission - to transform temporary staffing recruitment within the social care sector. Our online marketplace helps care homes fill rota gaps without the need for expensive recruitment agencies. Launched in 2017, we now work with more than 90,000 nurses, support workers and carers and 600+ care providers across England, Scotland, Wales and Northern Ireland.

Working closely on a daily basis with care homes we're aware that medicines management is the single most repeated process in a care home and one of the largest reported adverse incidents.

Transitioning into winter only heightens the risks associated with medicine-related incidents, so it's important to review your medicines policy leading up to winter, as well as your documentation and record keeping measures.

So we're here to help. Throughout this toolkit you'll find practical tips on how to improve your documentation and record keeping, checklists to help you update your medicines policy and guidance on how to generally prepare your care home for this winter.

We do hope you'll find it useful. If you have any questions, please reach out to us by emailing [hello@florence.co.uk](mailto:hello@florence.co.uk).

# Keeping your documentation in good shape

## Top tips for best practise

It's crucial that all care settings have an effective record-keeping system in place. It's an integral part of care that contributes to improving the health of residents, effectiveness of staff and the efficiency of your establishment. Below, we've listed 4 ways to improve the record keeping and documentation measures in your care setting:



## Better training = fewer mistakes

By having a **robust training process** that ensures all members of your staff understand the legal implications and expectations of good record keeping, you are much more likely to avoid mistakes and reduce the risk of harm.

Comprehensive documentation which is regularly **audited and updated** will enable you to deliver true person-centred care. It'll also make the transfer of knowledge to other organisations, new starters and agency workers seamless.

# 2

## Maintaining Regulatory Compliance

To comply with [Regulation 17](#) (good governance) in the 'Health and Social Care Act', care providers must have **effective governance**, including assurance and auditing systems or processes.

These systems must assess, monitor and drive improvement in the quality and safety of the services provided, including the quality of the experience for people using the service.

Having a simple but effective **audit tool** will ensure you are able to demonstrate not only that the documents have been reviewed, but that gaps and outstanding actions required to address shortfalls have been assigned to one person and a 'close by' date agreed.

# 3

## Documentation and communication (focus on the resident)

Good documentation involves **exploring and discussing choices**: to help work out what is most important, and the implications of different choices.

The gold standard is to support the resident to write their own care plan. If this presents too much of a challenge, then encourage the resident to take part in discussions around the type of care they need and want.

Where appropriate, involve family and friends. Don't forget to document that the person at the receiving end of care has been involved - and remember to include a clear review date.

# 4

## Efficiency and storing documents/records

GDPR (General Data Protection Regulations) came into effect in May 2018. The challenge for every care provider is how to make sure the personal information of all residents and staff are kept in a secure area, but still available for use.

Many organisations have had to get used to locking care plans away and ensuring **Personal Identifiable Data (PID)** is available only to those who really need it.

Remember - not everyone has a right to see the documentation you keep, so check before you hand it over. Ensure you have a clear IG policy and that the retention schedule for documentation is clear. You should not keep records for longer than is required.



# Medicines Policy Audit Tool

We've created this tool to assist you with updating or auditing your current medicines policy in your care setting. This guidance aims to help you manage medicines safely over the winter months.

The following checklist uses a traffic light grading system.

After reading each proposed policy, tick which box applies to your care setting:

**Green:** Yes, policy is up to date

**Amber:** Policy in place, but needs updating

**Red:** No current policy



If you select **green** for the proposed statement or policy, provide evidence in the final column. If you select **amber** or **red**, provide the action required to improve the safety measure.

Once you have completed the required fields, be sure to provide a date and signature in line with record-keeping best practices.

# Medicines Management Audit Tool

Care Home Name: \_\_\_\_\_

	Green Yes: up to date	Amber Yes: needs updating	Red No policy	Evidence OR Action Required	Date Completed and Signature
Do you have an up-to-date medicines policy, which is accessible to all staff as required?					
Do those staff who administer medications have up-to-date medicines management training?					
Do those staff who administer medications have up-to-date training records?					
All care plans reflect accurate and up-to-date information about a resident's medications management.					
The known allergies for each resident are clearly marked on the MAR and the resident care documentation.					



# Medicines Management Audit Tool

	Green Yes: up to date	Amber Yes: needs updating	Red No policy	Evidence OR Action Required	Date Completed and Signature
All care plans have a monthly medications management audit in place.					
All photographs used for medications administration are up to date (no more than 6 months old) and are signed to state that they are a true likeness.					
An electronic or printable discharge summary is transferred with the resident between care settings.					
All records are disposed of confidentially after the appropriate period of time.					
Medications stock counts are monitored daily.					

# Medicines Management Audit Tool

	Green Yes: up to date	Amber Yes: needs updating	Red No policy	Evidence OR Action Required	Date Completed and Signature
Medications are stored correctly in line with the manufacturer's guidance.					
Fridge items are stored correctly and have the opening dates and expiry dates clearly identified.					
The fridge temperatures are checked on a daily basis and signed as correct.					
Medications are disposed of in the correct way as per medications policy.					
The clinical room is clean and free from dust and debris.					
The clinical room is locked at all times.					

# Medicines Management Audit Tool

	Green Yes: up to date	Amber Yes: needs updating	Red No policy	Evidence OR Action Required	Date Completed and Signature
A process is in place for identifying and reporting medication errors.					
Medication errors are monitored and training provided where identified.					
Care Home staff are aware of arrangements for notifying suspected or confirmed medicine-related incidents.					
Care home staff know the actions to take to protect any resident involved in a medicine-related incident.					
The cause of medicine-related incidents are investigated by care home staff.					
A red tabard (DO NOT DISTURB) is worn by all staff administering medications.					

# What is Florence?

Florence is the faster way to fill rota gaps.

With Florence, you can send shift invites automatically and watch your rota update itself in real time. You never need to edit a spreadsheet or WhatsApp a group chat to find staff again: it's all taken care of for you.

## Fill shifts with people you trust

Florence fills your shift gaps with permanent and bank staff first, helping you cut down agency spend.

### Florence's benefits include:

- ➔ Lightning-fast scheduling:  
bulk SMS invites accepted  
by staff in a click
- ➔ Hours of time saved:  
online rota builds and updates itself
- ➔ Accurate spend:  
Time and attendance  
tracked to the minute

# How can Florence help you this winter?

We know your care home is working hard to keep residents and staff healthy throughout winter.

Florence helps by giving you the freedom to prioritise your permanent and bank staff for shifts first.

This means you need fewer agency staff, helping you reduce agency spend up to 30%.

If you *do* need further support filling shifts, you can push them out to Florence's network of 90,000+ nurses, care assistants and support workers. From here you can easily book fully independent healthcare professionals.

## Get in touch

Book a demo to find out how Florence can help you this winter.

We'll show you how you can fill your rota gaps fast, while saving money on your agency spend.

[Book a demo](#)