



# SAFETY IQ IMPLEMENTATION TOOLKIT FOR NEW PHARMACIES



## INTRODUCTION TO SAFETY IQ

In line with its mandate to protect the health and safety of the public, the College of Pharmacists of Manitoba (College) implemented a mandatory continuous quality improvement (CQI) program called Safety Improvement in Quality (Safety IQ) for all community pharmacies. The College successfully piloted this program with 20 community pharmacies for one year starting in September 2017.

Participants in the Safety IQ Pilot Program credited the Safety IQ tools with making it easier to find and address medication incident trends and amend pharmacy practices to improve patient safety.

Since June 1, 2021, community pharmacies across Manitoba report medication incidents and near-miss events to an online incident reporting software platform of their choice that meets College Criteria. Online reporting platforms not only support reporting of medication incidents and near-miss events, but also documenting, analyzing, and learning from individual incidents and incident and near-miss trends over time.

De-identified (anonymous) medication incident and near-miss event data is exported to the National Incident Data Repository for Community Pharmacies (NIDR) where medication safety specialists with the Institute for Safe Medication Practices Canada (ISMP Canada) analyse aggregate data and make recommendations for medication safety improvements to healthcare professionals across Canada. ISMP Canada shares de-identified data summaries with the College to support resource development and improvements to standards for CQI in community pharmacies.

The goal of Safety IQ is improved medication safety for all Manitobans. Safety is everyone's responsibility, and we all have a role to play.

As the pharmacy manager, you are responsible for the implementation of Safety IQ in your pharmacy.

## PURPOSE OF THE SAFETY IQ IMPLEMENTATION TOOLKIT

This toolkit aims to support pharmacy managers with the initial implementation of Safety IQ in a new pharmacy. There are many tasks to complete during implementation of Safety IQ to not only meet College requirements, but also to ensure you build a firm foundation for your team's full engagement with Safety IQ. This toolkit is meant to help you with the initial technical and compliance steps to implementing Safety IQ, but it is not a substitute for the more robust [Guide to Safety IQ](#), the [Medication Incident and Near-Miss Event Practice Direction](#), and the [Quality Assurance Self-Assessment](#).

## APPOINTING A CQI COORDINATOR

The College recommends that the pharmacy appoint a CQI Coordinator to assist in the implementation and on-going process of Safety IQ. Any pharmacy team member, including pharmacy assistants, technicians, and staff pharmacists with the requisite confidence and knowledge can be a CQI Coordinator. While you can appoint a pharmacy manager as a CQI Coordinator, the development of a just and safe culture in your pharmacy is better supported with the appointment of non-management staff.

## CHOOSING A REPORTING PLATFORM AND EXPORTING DATA TO THE NIDR

### Step One: Choose a Medication Incident Reporting Platform

A medication incident reporting platform is a software program that pharmacy teams use to record data on medication incidents and near-miss events and that exports the de-identified (anonymous) data to the [National Incident Data Repository for Community Pharmacies](#) (NIDR) housed by [ISMP Canada](#).

Each community pharmacy must select a reporting platform of their choice that meets the College [Medication Incident Reporting Platform Criteria](#), unless they are part of a corporation that has mandated a reporting platform already. Allowing independent and corporate pharmacies to choose a reporting platform eliminates the potential for redundant (simultaneous) reporting to a College mandated program and the pharmacy's internal program (as is the case in other provinces).

[The Patient Safety Company](#), [Pharmapod](#), and [Community Pharmacy Incident Reporting](#) (CPhIR) are the known medication incident reporting platform providers in Manitoba. These reporting platform providers are aware of and comply with the Criteria.

**If your pharmacy is already subscribed to a reporting platform not listed above or uses a software developed in-house**, the pharmacy manager and platform provider must

- determine if the platform meets the Criteria; and
- work with the NIDR team to enable the reporting platform to submit data to the NIDR (see the next section for details).

When choosing a medication incident reporting platform, you should consider the following:

- Schedule product demos with several providers to ensure you are choosing the right product for your team
- Understand the capabilities of each platform and ask lots of questions
- Ask if the platform provider supplies a Safety Self-Assessment

### Step Two: Sign a Data-Sharing Agreement with ISMP Canada

Pharmacies must sign the following data sharing agreement between the data owner (the pharmacy or corporation) and the NIDR housed by ISMP Canada:

<https://www.ismp-canada.org/CommunityPharmacy/NIDR/NIDR-MB-DSA.pdf>

### Step Three: Declare Your Reporting Platform Provider on the Pharmacy Portal

Declare your reporting platform provider and the date you subscribed using the following steps:

1. Sign into your Pharmacy Portal profile at [cphm.ca](http://cphm.ca)
2. Under 'Pharmacy Menu,' click 'Update Pharmacy Safety IQ Information'
3. Enter the name of your platform provider and the subscription date and click 'Save.'

If you have any questions about implementing the technical aspects of Safety IQ, or anything related to Safety IQ, please contact us by email at [safetyiq@cphm.ca](mailto:safetyiq@cphm.ca).

## EDUCATION FOR PHARMACY MANAGERS AND CQI COORDINATORS

As the pharmacy manager, you should read the College [Guide to Safety IQ](#), [Medication Incident and Near-Miss Event Practice Direction](#), and the [Community Pharmacy Safety Culture Toolkit](#) for a comprehensive overview of the program requirements and resources to support reporting, documenting, analysing, and sharing learnings of medication incidents and near-miss events. If you appoint a CQI Coordinator, they should also review these documents.

As senior leaders in your pharmacy, managers and coordinators are key to building a positive safety culture and encouraging all staff to participate fully in Safety IQ.

## SAFETY SELF-ASSESSMENT AND CQI MEETING

Every community pharmacy must complete a Safety Self-Assessment (SSA) and formal CQI meeting within their first year of implementing Safety IQ. In the case of a new pharmacy opening, you may choose to complete your SSA in one of two ways:

- Complete an SSA before your pharmacy opens. This approach would allow you to use your SSA to establish pharmacy workflows from a patient safety perspective; or
- Complete an SSA 4-6 months after your pharmacy opens. This will give you time to establish pharmacy practices and workflow before diving into the full analysis of completing the SSA.

Either of these approaches is correct. Choose an approach that you feel will work best for your team and will reduce the chances of patient harm. While you are required to complete an SSA within one year of opening and every three years thereafter, you may choose to complete an SSA earlier than the three-year interval if safety improvements are needed.

While you are only required to have one formal, documented CQI Meeting annually, the College encourages you to have multiple meetings or safety huddles throughout the year. Ultimately, you want to have many discussions about how Safety IQ and CQI is going in your pharmacy and to get feedback from staff on pharmacy improvement plans.

Additional information and supporting resources for the SSA and CQI Meeting are available in the [Guide to Safety IQ](#).

## STAFF TRAINING

All pharmacy staff, including pharmacists, pharmacy technicians, and pharmacy assistants must be trained on your pharmacy's medication incident reporting platform and the elements of Safety IQ. Medication incident reporting platforms must provide online training modules or videos for users to meet the College Criteria.

Staff training should include:

- Completion of modules/videos provided by your medication incident reporting platform
- Review of College resources, including, but not limited to:
  - » [Introduction to Safety IQ Training Video](#)
  - » [Quick Guide to Reporting](#)
  - » [Quick Guide to Documenting](#)
  - » [Quick Guide to Responding to an Incident](#)
  - » [Safety IQ FAQ](#)
- Review of your pharmacy's policy and procedures for Safety IQ

All staff should be engaged in reporting, documenting, analyzing, and sharing learning about medication incidents and near-miss events to build a positive safety culture because safety is everyone's responsibility and everyone has something to contribute.

## SAFETY IQ POLICY AND PROCEDURES

According to the Medication Incident and Near-Miss Event Practice Direction, you must have policies and procedures for addressing, reporting, investigating, documenting, disclosing and learning from medication incidents and near-miss events. Please take some time to review the requirements, suggestions, and resources outlined in the Guide to Safety IQ to develop robust policies and procedures for the program. The College [Guideline on Minimum Policy and Procedures Manual](#) and [Policy and Procedure Template](#) are tools for policy development and include sections on Safety IQ.

## SAFETY IQ IMPLEMENTATION CHECKLIST

You can use the Safety IQ Implementation Checklist on the following pages to ensure you fulfill all of the Safety IQ requirements. Certain tasks must be undertaken specifically by the pharmacy manager and others include the pharmacy team. The reporting platform will also be responsible for some steps involving submission of de-identified data to the [NIDR for Community Pharmacy](#) as well as supplying online training modules and support.

This checklist is for the benefit of the pharmacy manager and staff and **does not** need to be submitted to the College. If you have any questions about the checklist, or anything related to Safety IQ, please contact us by email at [safetyiq@cphm.ca](mailto:safetyiq@cphm.ca).

### 1. Education and Awareness

	<p>Pharmacy manager and CQI Coordinator (if appointed) review and understand College resource documents on about the Safety IQ program:</p> <ul style="list-style-type: none"> <li>• <a href="#">Medication Incident and Near-Miss Event Practice Direction</a></li> <li>• <a href="#">Guide to Safety IQ</a></li> <li>• <a href="#">Community Pharmacy Safety Culture Toolkit</a></li> </ul>
	<p>Pharmacy staff members, including pharmacists, pharmacy technicians, and pharmacy assistants, review and understand College resource documents on the Safety IQ program:</p> <ul style="list-style-type: none"> <li>• <a href="#">Safety IQ FAQ</a></li> <li>• <a href="#">Medication Incident and Near-Miss Event Practice Direction</a></li> <li>• <a href="#">Introduction to Safety IQ Training Video</a></li> <li>• <a href="#">Quick Guide to Reporting</a></li> <li>• <a href="#">Quick Guide to Documenting</a></li> <li>• <a href="#">Quick Guide to Responding to an Incident</a></li> </ul>
	<p>Pharmacy staff including pharmacists, pharmacy technicians, and pharmacy assistants review and understand the pharmacies policies and procedures for Safety IQ.</p>

### 2. Choosing a Reporting Platform and Exporting Data to the NIDR

Each community pharmacy is allowed to choose a reporting platform that meets the College [Medication Incident Reporting Platform Criteria](#). An important criteria is the sending of de-identified medication incident and near-miss event data to the [Canadian Medication Incident Reporting and Prevention System](#) (CMIRPS) [NIDR](#) housed by ISMP Canada.

	<p>Pharmacy manager or pharmacy corporation signs and submits a <a href="#">Data Sharing Agreement</a> with the NIDR.</p>
	<p>Pharmacy manager reviews and understands the Safety IQ <a href="#">Medication Incident Reporting Platform Criteria</a> (Criteria).</p>
	<p>Pharmacy manager either:</p> <ul style="list-style-type: none"> <li>• Subscribes to a medication incident reporting platform that meets College Criteria; OR</li> <li>• Ensures existing or in-house medication incident reporting platform meets the College Criteria</li> </ul>
	<p>Pharmacy manager declares the pharmacy's medication incident reporting platform information on the Pharmacy Portal at <a href="http://cphm.ca">cphm.ca</a>.</p>
	<p>Pharmacy manager obtains a Safety Self-Assessment tool included in chosen reporting platform or from another source. (See <a href="#">Safety IQ FAQ</a>).</p>

### 3. Staff Training

For successful implementation and engagement of Safety IQ, pharmacy staff need to be trained on the reporting platform and the pharmacy's workflow process for entering incidents and what near misses should be reported.

	Pharmacy manager considers whether to appoint a staff member as a Continuous Quality Improvement (CQI) coordinator in addition to themselves to help ensure training is ongoing and complete and incidents and near-miss events are reported in a timely manner.
	Pharmacy manager engages staff in discussion on processes to report incidents and near-miss events.
	Pharmacy manager ensures that all pharmacy staff have completed the training provided by the medication incident reporting platform.

If you have any questions about the checklist, or anything related to Safety IQ, please contact us by email at [safetyiq@cphm.ca](mailto:safetyiq@cphm.ca).