Discrepancy management

Introduction
Regulatory bodies and good hospital practice require that facilities have a process in place to ensure medications are accounted for and discrepancies are documented. Review of discrepancies by pharmacy and nursing personnel is essential to the management of the Pyxis MedStation™ system.

The intent of this document is to:
• Describe discrepancies as related to the Pyxis MedStation system
• Describe the system setup relating to discrepancies
• Describe the documentation of discrepancies
• Describe the discrepancy resolution process
• Discuss monitoring and reports used for discrepancy management

Description of discrepancies
When a user is required to count a medication in a Pyxis MedStation system pocket, a discrepancy occurs if the physical count is different than the inventory count tracked by the Pyxis MedStation system. A physical count of the inventory is always required on medications when the pocket is refilled, loaded, unloaded or inventoried. Additionally, specific medications can be configured for a physical count on each removal.

Types of discrepancies
Auto-resolved discrepancies: The user is not notified of the discrepancy and no resolution is required. Typically used with non-controlled substances.
Resolution-required discrepancies: The user is notified immediately and is required to resolve the discrepancy at the Pyxis MedStation device. A discrepancy is documented as resolved when the reason or explanation statement is entered at the device. This type of discrepancy resolution is required for controlled substances (CS) and select non-controlled substances.

Common reasons for discrepancies
• A user removed a quantity greater than the quantity requested
• A user removed a quantity less than the quantity requested
• A user with prior access cancelled the removal, but withdrew the medication
• A user did not remove the medication requested
• A user made a typographical error (for example, 11 instead of 1)
• A user accessed the wrong pocket
• There was a diversion or pilferage

System setup
Formulary
Medications may be set up to require a resolution or auto-resolve when a discrepancy is found. Controlled substance medications require a resolution and a witness during the resolution process. Non-controlled substance medications may be auto-resolved. For high cost non-controlled items with a high discrepancy rate, consider turning on verify or blind count, and turning the auto-resolve feature off to require discrepancy resolution.
**Users**

Independent Discrepancy Resolution is a user privilege that should not be assigned to anyone. If it is assigned, users with this privilege should let the witness user sign on first. If this privilege level is used, it is necessary to have some review of the user’s activities.

**Discrepancy reasons**

Reasons for discrepancies are predefined by CareFusion, but they can be added, modified or deleted to meet the unique needs of the hospital. Reasons can be modified to begin with over or under to indicate whether the count quantity was more or less than expected. It is suggested that the reason for Unresolved be changed to include hospital policy. Keep discrepancy reasons to a minimum to allow the user to see all the different reasons on one screen.

**Policy and procedures**

Policy and procedures relating to discrepancies should include:

- **Time to resolution**: Resolve discrepancies by the end of shift
- **Resolution responsibility**: Users involved in the discrepancy are responsible for discrepancy resolution
- **Discrepancy monitoring**: Nursing and pharmacy share responsibility for monitoring discrepancies
- **Disciplinary action**: User privileges may be suspended
- **Action required for unresolved discrepancies**: Manual process for documenting unresolved discrepancy is defined, including when to report to regulatory agency
- **Documentation of discrepancies**: Describes where discrepancies are documented in the system

**At the Pyxis MedStation system**

- An alert icon on the bottom of the screen indicates the presence of unresolved discrepancies
- Open discrepancy information is stored for 31 days
- Resolved discrepancies are stored for the transaction hold time (up to 32 hours) set at the console
- Transaction information is stored for the transaction hold time

- Reports can be generated to list open discrepancies and all discrepancies

**At the Pyxis console**

- The Attention Notices window located on the main screen indicates the presence of unresolved discrepancies and/or a bulletin can be set up to print (site-specific options)
- Discrepancy information is maintained for up to 31 days
- Transaction information is stored for 31 days
- Reports can be generated to list all discrepancies, documented discrepancies and undocumented discrepancies

**Discrepancy resolution process**

Discrepancies must be resolved at their respective Pyxis MedStation device. Discrepancies are best resolved at the time of discovery. To resolve a discrepancy, determine the reason(s) for the discrepancy:

1. Discuss the event with the individuals involved.
2. Recount the medication using the inventory feature.
3. Review the Medication Activity report for the particular medication with a discrepancy.
4. Review the patient chart.
5. Review the All Stations Events report.

Once the reason(s) is determined, the resolution is documented at the respective Pyxis MedStation device.

**Documentation procedure**

1. User signs on to the Pyxis MedStation system.
2. From the main menu, press **Document Discrepancy**.
3. Select the discrepancy to document from the list of undocumented discrepancies.

**NOTE:** If the previous user miscounted, an additional discrepancy will be generated.

4. Log in witness, as required.
5. From the Document Discrepancy screen, select the reason, and press **Accept**.
6. If the discrepancy reason is not on the list, press **Other**.
7. Type in a reason of up to 60 characters that explains in detail why the discrepancy occurred.
8. Press **Accept**.
Monitoring

Discrepancy monitoring is a shared responsibility with nursing and pharmacy.

Nursing monitoring

- Include discrepancy review and reconciliation at the end of shift report
- Conduct routine physical inventory of controlled substances, at least weekly

Pharmacy monitoring

- Review daily for open discrepancies
- Review daily for appropriateness of discrepancy resolution reasons
- Review monthly for non-controlled substance discrepancies
- Share inappropriate discrepancy resolution documentation with nursing management

Discrepancy reports

Pyxis MedStation system console reports

Discrepancies report (controlled and non-controlled substances)

This report—also known as All Discrepancies—helps the user resolve discrepancies by providing current and prior access information. Set up this report as a batch report to monitor all controlled substances and to look for automatically resolved discrepancies for non-controlled substances.

For controlled substances, generate reports for all discrepancies, undocumented discrepancies or documented discrepancies. Nurse managers review the Undocumented Discrepancy report daily to monitor compliance to policy.

For non-controlled substances, monitor auto-resolved discrepancies monthly. Note trends among users, medications and times or days of the week. Trends may indicate potential for medication error, incorrect refilling of the Pyxis MedStation system, diversion and pilferage or other types of staff performance issues, as well as waste in the system.

All Station Events

Print, as needed, when a detailed transaction summary for a specified period of time is needed to resolve a discrepancy. Specify medication and sort by Stn/Med to view the chronological transaction history.

Med Analytics Service and Knowledge Portal reports

Key Performance Indicators from the Med Analytics Service and the Knowledge Portal provide historical information for monitoring and trending both controlled substance discrepancies and non-controlled substance discrepancies. Reports include:

- Number of controlled substance discrepancies by station
- Number of controlled substance discrepancies by user
- Average number of non-controlled discrepancies per station
- Controlled substance discrepancies unresolved within 24 hours by stations
- Controlled substance discrepancies unresolved within 24 hours by users

NOTE: Archived data also contains discrepancy information.