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Reference Number: 603-13-DD

Title of Document: Medication Technician Certification

Date of Issue: November 1, 2002  
Effective Date: November 1, 2002  
Last Review Date: July 16, 2020  
Date of Last Revision: July 16, 2020 **(REVISED)**

Applicability: Operators of DDSN Licensed Residential Settings/Facilities, Community Residential Care Facilities, and/or DDSN Licensed Day Facilities

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## **I. PURPOSE**

The purpose of this departmental directive is to establish a framework within which a Medication Technician Certification program shall be initiated for selected unlicensed healthcare personnel (i.e., non-nursing staff) who provide medications to those receiving services in South Carolina Department of Disabilities and Special Needs (DDSN) licensed residential settings/facilities, Community Residential Care Facilities (CRCFs), and/or DDSN licensed day facilities.

## **II. INTRODUCTION**

The General Assembly of the State of South Carolina has granted to DDSN the statutory authority for designated unlicensed healthcare personnel to provide selected prescribed medications to DDSN persons in community settings only when those designated unlicensed healthcare personnel have documented successful completion of medication training and skill competency evaluation. This training and competency is achieved by the successful completion of a DDSN approved Medication Technician Certification program. Excluded from this provision are facilities licensed by the South Carolina Department of Health and Environmental Control (DHEC) as Intermediate Care Facilities for Individuals with Intellectual Disabilities (ICFs/IID). However, the provision may apply to those receiving ICF/IID services when they are receiving services in a DDSN Licensed Day Facility.

The provision of medication does not include judgment, evaluation or assessment by the selected unlicensed personnel.

The provision of medication by selected unlicensed personnel is limited to oral, sublingual, buccal, topical, inhalation and transdermal medications, ear drops, eye drops, nasal sprays, injections of regularly scheduled insulin, and injections of prescribed anaphylactic treatments.

Selected unlicensed healthcare personnel shall not provide sliding scale insulin, other injectable medications, vaginal medications and/or rectal medications.

A written or electronic record of each medication provided, including time and amount provided, is required as part of the provision of medication.

Medication ordered on an as needed or PRN basis may only be provided by designated unlicensed healthcare personnel. The DDSN Protocol for PRN Medications (Attachment D) shall be adhered to.

Designated unlicensed healthcare personnel shall not provide any medication to any DDSN person unless currently certified through a DDSN approved Medication Technician Certification program.

Self-administration of medication is a procedure by which any medication is taken orally, injected, inserted, topically applied or otherwise administered by the person to whom the medication is prescribed without prompting or assistance. The procedure includes removing an individual dose from a previously dispensed and labeled container (including a unit dose container), verifying it with the directions on the label, taking it orally, injecting, inserting, applying topically or otherwise administering the medication. DDSN persons may “self-administer” their own medications only when an assessment of the person’s ability to self-administer medications is conducted and documented in writing using all appropriate DDSN approved “Self-Administration of Medication Assessments(s)” and there must be a written order from a physician or approved health care prescriber authorizing the self-administration of medication. In CRCFs, the frequency of written orders must comply with the directions provided in DHEC Regulation 61—84: Standards for Licensing Community Residential Care Facilities. The assessment(s) must be completed by a registered nurse (RN), licensed physician, or a licensed practical nurse (LPN) under the supervision of a RN. If completed by an LPN, the RN must verify in writing that the LPN has the skill to accurately review the consumer’s ability to self-administer medication. The consumer’s ability to self-administer medications must be re-assessed at least annually and when a new route for medication is prescribed.

### **III. OVERVIEW**

The DDSN Medication Technician Certification program may be offered in one (1) of three (3) ways:

- 1) By selected technical or four (4) year colleges;
- 2) By DDSN; or
- 3) By the DSN Board/contracted service provider themselves.

Regardless of the forum, all Medication Technician Certification programs shall meet the Program Standards and Curriculum Standards enumerated herein.

#### **IV. STANDARDS.**

##### **Program Standards**

##### 1. Length of Program

The length of the Medication Technician Certification program, including classroom instruction, practicum experience, and supervised medication passes, shall not be less than 16 hours. Lengths exceeding 16 hours may be necessary to develop student competencies.

##### 2. Approved Instructors

Approved instructors for Medication Technician Certification programs may include:

- Registered Nurses (RNs);
- Licensed Practical Nurses (LPNs) who have at least two (2) years of clinical nursing experience and who work under the supervision of an RN. The RN supervising an LPN instructor must verify in writing that the LPN instructor is capable of effectively teaching the concepts and skills covered in the Medication Technician Certification program curriculum;
- Licensed Pharmacists;
- Licensed Physicians.

Instructors who do not work in an academic setting (i.e., DDSN employed or community provider employed), must complete a “train the trainer” orientation class.

An approved instructor may authorize an LPN who is not an instructor to oversee 1:1 supervised medication passes. The approval must be in writing and verify that the LPN is capable of supervising the 1:1 medication pass.

##### 3. Instructor/Student Ratio

Adherence to the following instructor to student ratios is required:

- For classroom instruction, no more than 1:16;
- For supervised practicum experience, no more than 1:8;
- For supervised medication passes, no more than 1:1.

##### 4. Testing

Competency testing shall occur for each unit in the curriculum. Tests will measure the knowledge and all basic skills required for safe and effective functioning as a Certified Medication Technician. A passing score of 85% will be required on each unit test with an opportunity to retake each test up to two (2) additional times after additional tutoring has

occurred. If all unit tests are not passed with a score of at least 85% after three (3) attempts, the entire Medication Technician Certification course must be repeated.

5. Certificate

A certificate shall be awarded by DDSN or the DSN Board/contracted service provider upon successful completion of all components of the Medication Technician Certification program including the supervised medication passes.

6. Annual Refresher Courses

To maintain certification, each Certified Medication Technician shall be required to complete an annual refresher course on the provision of medication within one (1) year of the previous re-certification date. The refresher course shall be no less than two (2) hours duration. The refresher course shall be taught by an approved instructor as defined herein.

7. Oversight

A. Polices:

- i. Each facility operator utilizing Certified Medication Technicians shall have a written policy governing the provision of medications by Certified Medication Technicians. The policy shall specify activities that will be performed by Certified Medication Technicians, the process to review, monitor and oversee the work of the Certified Medication Technicians, the frequency of the activities to be performed, and by whom.
- ii. Providers utilizing Certified Medication Technicians shall identify a health-care professional who will, as needed, answer questions posed by or provide directions to the Certified Medication Technicians. The health-care professional identified shall be a physician, pharmacist, or nurse. The process for contacting the health-care professional shall be included in the Medication Administration policy.

B. Nursing Responsibilities:

Review, oversight, and monitoring activities shall be conducted by an RN or an LPN under the supervision of an RN who has verified in writing that the LPN is capable of effectively conducting such activities. These activities shall include:

- Teaching the 16 hour curriculum as an approved instructor.
- Conducting the annual two (2) hour refresher course.
- Review of medication records (medication administration records and medication error reports) on a regular basis.
- On-site, quarterly visits to a facility/setting in which Certified Medication Technicians are utilized.

- Conducting quarterly quality assurance consultation meeting and follow-up based on review of medication records, errors, and trends.
- Training and technical assistance based on the review of medication records, medication error reports, and when new medications or routes of medications are prescribed.
- Monitoring that may include observation of medication passes to ensure ongoing competence of the Certified Medication Technician.
- Review of consumer's ability to self-administer medications
- Providing and documenting one-on-one instruction to specific staff members for the administration of regularly scheduled insulin and prescribed anaphylactic treatments for individual consumers. Follow-up monitoring to occur at least every six (6) months.
- Rescinding medication technician certificates if it is determined that a Certified Medication Technician is no longer competent to safely provide medication to consumers.
- Ongoing efforts to ensure that Certified Medication Technicians only perform within the scope of the statutory authority and within their competency.

C. Documentation of Oversight Activities:

Providers shall maintain documentation with supporting evidence of the review, monitoring and/or oversight activities. The records should include the location, date, time of the activity, content covered, and the name of the RN, LPN, or other medical professional performing the activity.

8. Medication Error Reporting

All facility operators who utilize Certified Medication Technicians shall follow DDSN Directive 100-29-DD: Medication Error/Event Reporting which includes tracking of medication errors and error rates on a monthly basis, by individual program location (i.e., facility/setting).

9. Records

The following information shall be maintained for all medication certification courses taught. If the facility operator makes arrangements for employees to take courses taught by a college, training consultant, or DDSN instructor, access to this information should be part of the agreement to teach.

- Instructor qualifications;
- Student attendance;
- Lesson/curriculum plans;
- A master copy of all tests administered;
- Student test results;
- A list of all graduates; and
- Proof that students successfully completed the classroom, practicum and supervised medication portions of the Medication Technician Certification program.

Providers employing Certified Medication Technicians are required to maintain the following records:

- A roster of all Certified Medication Technicians employed;
- Copies of Certified Medication Technician certificates with date of award;
- Documentation of quarterly on-site visits as described herein;
- Record of annual refresher course attendance and topics covered;
- Record of any medication errors/events as specified in DDSN Directive 100-29- DD: Medication Error and Event Reporting.

## **V. CURRICULUM STANDARDS**

### **1. Integrated**

Classroom instruction that establishes a knowledge base shall be integrated with practicum experiences that the student receives at a simulated (or real) treatment setting, and with the supervised medication passes that occur.

### **2. Objectives**

Classroom instruction shall be based on objectives for each unit that reflect the purposes of the training program and give direction to the instructor and the students. These objectives will be tied to the various competencies on which the students will be tested.

### **3. General Information**

Classroom instruction shall include general information relevant to the provision of medication. Topics will include:

- Relevant state and federal laws and regulations;
- Terminology;
- Forms of medication;
- Routes of administration;
- Abbreviations/symbols;
- Documentation guidelines; and
- Medication reference works, etc. (See the attached curriculum outline.)

### **4. Body Systems**

Classroom instruction shall include an overview of the general structure and function of body systems, and the pharmacological effect of medications on these systems.

### **5. Categories of Medication**

Classroom instruction shall address the major categories of medications and how each category is related to a body system and its pathology.

6. Duties of a Certified Medication Technician

Classroom instruction shall focus on the role and scope of practice of the Certified Medication Technician, as well as what is not within their scope of practice. The approved instructor must distinguish between the approved scope of the Certified Medication Technician and the delegation of nursing tasks which are not within the scope of the Medication Technician Certification.

7. Practicum Experience

This portion of the curriculum will utilize physical facilities that reasonably simulate a health care setting (or utilize an actual health care setting) and the types of medication dispensing systems used by the DSN Board/contracted service provider.

- A. The approved instructor will design exercises for skill demonstration that simulate the various aspects of safe and effective medication provision and documentation thereof.
- B. Oral and topical medications, sublingual, buccal, inhalation medications, transdermal medications, ear drops, eye drops, and nasal sprays may be included in a simulated skill demonstration.
- C. Injection of regularly scheduled insulin and prescribed anaphylactic treatments will require individualized instruction and documentation of successful completion of training from an approved instructor. Competence will be re-evaluated and documented every six (6) months.

8. Supervised Medication Passes

When classroom instruction and practicum experiences have been successfully completed, each student will be required to demonstrate their competency by successfully completing three (3) medication passes supervised by a licensed nurse, including medication setup, delivery and documentation. The student must complete the medication passes independently without verbal and non-verbal prompts or manual assistance. Three (3) supervised passes may be defined as passing medications to three (3) different people during a single visit to a facility. The student's performance during medication passes shall be documented on the appropriate Employee Checklist found in Attachment C.

9. Curriculum Outline

“Curriculum Outline” approved by DDSN is an attachment to this directive. Any curriculum used in the certification of Medication Technicians shall address each of the components included in the outline, and shall possess corresponding learning objectives, and shall require competency-based testing.

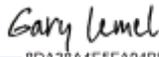
All Medication Technician Certification programs must be approved in writing by the DDSN Division of Quality Management prior to use and every three (3) years thereafter. Curriculum

approved by DDSN prior to October 2016 must be updated as appropriate and resubmitted to DDSN Division of Quality Management for approval.

DocuSigned by:  
  
7/29/2020  
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Barry D. Malphrus  
Vice-Chairman

DocuSigned by:  
  
7/22/2020  
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Gary C. Lemel  
Chairman

***To access the following attachments, please see the agency website page “Current Directives” at: <https://ddsn.sc.gov/providers/ddsn-directives-standards-and-manuals/current-directives>***

- Attachment A: CURRICULUM OUTLINE - Medication Technician Certification
- Attachment B: SAM Assessment – Oral
- Attachment B-2: SAM Assessment – Sublingual
- Attachment B-3: SAM Assessment – Buccal
- Attachment B-4: SAM Assessment – Topical
- Attachment B-5: SAM Assessment – Metered-dose Inhalers
- Attachment B-6: SAM Assessment – Glucometer
- Attachment B-7: SAM Assessment – Insulin Injection
- Attachment B-8: SAM Assessment – Epi-Pen Injection
- Attachment B-9: Guidance for completing Assessment Form for SAM and Self-Use of Glucometers
  
- Attachment C: Employee Checklist – Glucometer Use
- Attachment C-2: Employee Checklist – Insulin Pen Injection
- Attachment C-3: Employee Checklist – Oral Medications
- Attachment C-4: Employee Checklist – Topical Medications
- Attachment C-5: Employee Checklist – Epi-Pen Injection
- Attachment C-6: Employee Checklist – Ear Drop Medication
- Attachment C-7: Employee Checklist – Eye Drop Medication
- Attachment C-8: Employee Checklist – Metered-dose Inhaler
- Attachment C-9: Employee Checklist – Nasal Spray Medication
- Attachment C-10: Employee Checklist – Transdermal Medication
- Attachment C-11: Employee Checklist – Buccal Medication
- Attachment C-12: Employee Checklist – Sublingual Medication
  
- Attachment D: DDSN Protocol for PRN Medications