

# Procedure for Lead Registered Healthcare Practitioners and Service Managers using Patient Group Directions within their service



## Purpose of this procedure:

Patient group directions (PGDs) provide a legal framework that allows the supply and/or administration of a specified medicine(s), by named, authorised, appropriately registered health practitioners, to supply and administer specified medicines to pre-defined groups of patients, without a prescription or an instruction from a prescriber. A PGD is defined in Health Service Circular (HSC 2000/026) as: 'Written instructions for the supply or administration of medicines to groups of patients who may not be individually identified before presentation for treatment.'

Registered healthcare practitioners supplying and/or administering medicines under a PGD must follow their professional code of conduct and ensure their competence to supply and/or administer medicines under a PGD.

This procedure outlines the responsibilities of the Lead Registered Healthcare Practitioners /Service Managers implementing the use of PGDs within their service within NHS Lothian.

## The Procedure

The Lead Registered Healthcare Practitioner / Service Manager within each area is responsible for identifying and authorising appropriate registered healthcare practitioners as competent to operate under each PGD. The Lead Registered Healthcare Practitioner / Service Manager must ensure that individual healthcare practitioners have undertaken necessary education and have had any learning needs addressed to ensure the individual is competent to work within the scope of each PGD. The Lead Registered Healthcare Practitioner /Service Manager is responsible for the record keeping and governance around the use of PGDs within their service.

## Authorisation and Record Keeping

The Lead Registered Healthcare Practitioner / Service Manager is responsible for:

- Signing the Lead Registered Healthcare Practitioner/ Service Manager section within each individual PGD to authorise staff to use the PGD.
- Reviewing the knowledge and competence of the healthcare practitioner before completing the Individual Authorisation Form for the PGD.
- Identifying any gaps in competency and establishing a comprehensive and appropriate training programme to allow the healthcare practitioner to demonstrate competency prior to using the PGD.
- Ensuring that training and re-training of healthcare practitioners using PGDs incorporates a post-training assessment of competency.
- Ensuring that any healthcare practitioner working under a PGD within their service has completed the authorising documentation.

- Providing the healthcare practitioner with an individual copy (or direct access to a copy) of both the clinical content of the PGD and the Individual Authorisation Form.
- Ensuring that up-to-date copies of each PGD are accessible in a file / folder (electronic and/or paper) for that clinical area. The file must also include a list of those healthcare practitioners currently authorised to use each PGD.
- Ensuring that when a PGD has been reviewed and updated, the outdated PGD is removed and archived, and only the current PGD is subsequently used.
- Implementing the appropriate document retention associated with the PGD, see [‘Retention of NHS Lothian Patient Group Direction documentation’](#).
- Ensuring that the facilities and equipment where individuals are administering/supplying medicines under a PGD meet the required standards. This included having a copy of the PGD available in the setting in which the care is provided.
- Make arrangement for monitoring pharmacovigilance and all communications (e.g. drug recalls) in relation to PGDs. This should include a mechanism for identification of problems or errors resulting from the use of a PGD.
- Maintaining records to allow the use of the PGD within the service to be audited using an audit approved by the PGD committee.

### Designated PGD Holder:

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The Lead Healthcare Professional / Service Manager can delegate responsibility for maintaining the PGD file / folder in the department to a named person who is the Designated PGD Holder within the service.

Where a Designated PGD Holder is appointed, the responsibilities are as follows:

- Maintain the PGD folder securely.
- Ensure that any changes / updates to the PGD are implemented appropriately.
- Ensure that the appropriate healthcare practitioners using the PGD have signed the Individual Authorisation Form on the PGD master copy and that the names are up to date.
- Ensure that PGDs are not used after their expiry date.
- The Designated PGD Holder will control access to these documents and ensure that appropriate records are maintained as required by the PGD Committee, see [‘Retention of NHS Lothian Patient Group Direction documentation’](#).

## Associated materials/references:

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[NHS Lothian Safe Use of Medicines Policy](#)

[Safe Use of Medicines – Policy Online](#)

NHS Education for Scotland (2025). *NHS Lothian TURAS Module Patient Group Directions* [online] Available at : [Search Results | Turas | Learn](#)

NHS Education for Scotland (2025). *NHS Grampian TURAS Module Patient Group Directions* [online] Available at : [Patient group directions \(PGDs\) | Turas | Learn](#)

NICE (2017). *Overview | Patient group directions | Guidance | NICE*. [online] Nice.org.uk. Available at: <https://www.nice.org.uk/Guidance/MPG2>.

GOV.UK (2016). [Patient group directions: who can use them - GOV.UK](#)

[Patient Group Directions Procedure](#)

[Procedure for registered healthcare practitioners working under Patient Group Directions](#)

[Retention of NHS Lothian Patient Group Direction documentation](#)