\*\* Practice Name\*\*

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PRACTICE MANAGER INDUCTION PACK

Add link to website

**INTRODUCTION**

Welcome to ……………………..Medical Practice.

We are delighted to have you join our team and we hope you are very happy here.

We have designed this induction pack to help you get the best out of your induction process. It is a template for you to amend and use in a way that best suits you.

Depending on your previous experiences and your transferable skills, there may be sections of this pack that are unnecessary and can be deleted.

We recommend you use the pack as a guide and add or replace sections that best suit your way of working.

**OUR PRACTICE TEAM**

**GP Partners:**

**Salaried GPs:**

**Practice Manager:**

**Assistant Practice Manager:**

**Advanced Nurse Practitioner:**

**Practice Nurses**

**Health Care Assistant:**

**First Contact Physiotherapist:**

**Pharmacist:**

**Pharmacist technician:**

**Administrative team:**

**\*\*Add Link to Practice Staff handbook\*\***

**INDUCTION CHECKLIST**

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| **Staff Issues** |
| **Item** | **Detail** | **Completed** |
| **Holidays and time off** | Management of absencesPolicy on absencesRecording and control[Calculate holiday entitlement - GOV.UK (www.gov.uk)](https://www.gov.uk/calculate-your-holiday-entitlement) |  |
| **Staff** | Structure chartStaff recordsDress codeFormal communications process |  |
| **Policies and Procedures** | All staff/ HR policies and procedure's locationReview process/ ownershipProcess for recruiting staff |  |
| **Resources** | Memberships and feesKey NHS resources (SPPA, NES) |  |
| **Locums – files/ contacts/ procedures** | requirements for employmentRetention of locum recordsPaymentTrainingRecruitmentReference checkingRegistration check: [The medical register - GMC (gmc-uk.org)](https://www.gmc-uk.org/registration-and-licensing/the-medical-register) |  |
| **Payroll** | SoftwareTraining on running the systemsPay gradesReview processResponsibilities |  |
| **Pensions** | Returns, Records, Removals[Employer Data Management (EDM) | SPPA (pensions.gov.scot)](https://pensions.gov.scot/about-online-employer-services/employer-data-management-edm) |  |
| **GP employment schemes** | Retainer scheme and RegistrarsPartnership contractsSalaried GP contractsSuperannuation records and contributions |  |
| **Staff files** | Location and content |  |
| **Appraisal process** | Timetable and roles/ responsibilitiesClinician appraisal arrangements. |  |
| **Staff benefits** | If applicable. |  |
| **Pay scales and future plans.** | Practice pay scales and review process. |  |
| **Building and site issues** |
| **Item** | **Detail** | **Completed** |
| **Alarms** | Security CodesControl centreOut of hours key holdingOut of hours emergenciesIntruder/ fire alarmsServicing arrangementsRecordsRoutine testsActivation button locations |  |
| **Buildings Insurances** | BuildingsClaims history and recordsSpecial equipment/ all risksInsurer contactsRecord locations |  |
| **CCTV** | LocationsSoftware systemsBackup arrangementsAccess requestsStorage locationsServicing |  |
| **Car parking** | Control/ Permissions/ problemsAccessSecurity |  |
| **Content insurances** | Record locationsClaim history |  |
| **Contractors** | Regular contractorsAgreements and recordsAccess to the premises |  |
| **Equipment** | Inventory and locationRoutine Servicing arrangementsRepairs |  |
| **Heating** | Servicing contractsTime clocksBoiler location |  |
| **Other insurance** | Locum etc |  |
| **Security** | Opening/ locking upAlarm codes |  |
| **Suppliers** | Key suppliers and services |  |
| **Telephony** | System basicsVoice recording and backupSystem management information |  |
| **Waste** | ContractorsServicingCosts. Documentation. Record locations |  |
| **Compliments and Complaints** |
| **Service standards** | Practice complaints policyNHS complaints procedureSignificant event procedures |  |
| **Records** | Location and review |  |
| **Review and resolution process** | Complaints involving partnersComplaints re third partiesRole of the PM in review meetings |  |
| **Computing** |
| **Website** | Maintenance arrangementsUpdatingFacilitiesManagement statistics |  |
| **Network** | Structure and access across the networkLocation of key files and resourcesAccess rights |  |
| **Back-up arrangements** | RoleProcedureProtocolsDocumentationServers and locations |  |
| **Access and security** | Passwords and personal accessStaff access rights |  |
| **Protocols and procedures** | Location and provide for reading and review |  |
| **Directory structure** | Own PC directory structure for file locationsKey files across the network |  |
| **File locations** | Backup drivesEssential/ critical files |  |
| **Intranet** |  |  |
| **Clinical System introduction** | Introductory overviewArrange training on clinical systemWeb accessed modulesReports and management informationSearches |  |
| **Email facilities** | Passwords and access instructionsPolicies for use. |  |
| **Hardware/ software requirements** |  |  |

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| **Finance** |
| **Accountant** | Introduce to accountantProvide accountants contact detailsIntroduce to accountancy softwareArrange training course if necessary |  |
| **Bank/ Banking signatories** | Introduce to bankReview signatoriesProvide bank records/ statementsReconciliation proceduresExpenditure records and controlDirect debit records and control |  |
| **Income streams** | ContractSLAReimbursementsPSD: SFE [GMS Statement of Financial Entitlements 2020-21 - final (scot.nhs.uk)](https://www.sehd.scot.nhs.uk/publications/GMS_Statement_of_Financial_Entitlements_2020-21.pdf)PrescribingPrivate services + feesEnhanced services |  |
| **Enhanced services** |  |  |
| **Professional insurances** | Defence unionLocum insurance |  |
| **Software** | PayrollForecasting |  |
| **Invoicing and petty cash** | Systems and recordsReconciliations proceduresIncorporation into accounts |  |
| **Forecasting and analysis** | Long term financial planning |  |
| **Review and reporting system** | Finance partnerClarity of responsibilities |  |
| **SPPA** | [Employer Data Management (EDM) | SPPA (pensions.gov.scot)](https://pensions.gov.scot/about-online-employer-services/employer-data-management-edm)How to opt out. |  |

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| **Partnership Issues** |
| **Contract basics** | GMS/PMS |  |
| **Drawings and payment** | Amounts/ review process |  |
| **Registrations** | GMCPVG [Apply for PVG - mygov.scot](https://www.mygov.scot/apply-for-pvg)Annual checksRecord keeping |  |
| **Meetings** | FrequencyRoleAttendeesMinutes |  |
| **Loans and mortgages** | Overview and managementPayment process and termination dates |  |
| **Partnership structure** | Seniority and controlVoting rightsPartners plans (e.g., retirement) |  |
| **Private earnings** | RetentionIndividual partners activities |  |
| **General** |
| **Patient Group Directives** | Location and useUpdatingResponsibilitiesList of PGDs -[Publications - Public Health Scotland](https://publichealthscotland.scot/publications/?q=&fq=phs_publication_type%3APatient+Group+Direction%23) |  |
| **Nurse Registrations** | Annual update requirementAnnual checks (NMC register)Registration fee payment arrangements[Search the register - The Nursing and Midwifery Council (nmc.org.uk)](https://www.nmc.org.uk/registration/search-the-register/) |  |
| **Introduce to Local PM Network** | Introduce to local HB PM coordinatorsIntroduce to PMs in the cluster/ locality |  |
| **Meetings** | Outline available meetings for learning and networking. |  |
| **Inland Revenue** | Log into Gateway account: [HMRC services: sign in or register: Register for HMRC online services - GOV.UK (www.gov.uk)](https://www.gov.uk/log-in-register-hmrc-online-services/register) |  |

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| **Recommended training on Turas/ Learnpro** |
| **Name of Module** | **Date completed** |
| Health and Safety [Scorm Player - Preventing hazards in the workplace module 1 : principles of health and safety (nhs.scot)](https://learn.nes.nhs.scot/Scorm/Launch/8908) |  |
| Health Acquired Infections (non-clinical) [5481ba5d-28f7-4300-a7b7-6963173bbcb1\_NESD1537 Health Protection ARHAI Resources ACC.pdf (windows.net)](https://nesvleprdstore.blob.core.windows.net/nesndpvlecmsprdblob/5481ba5d-28f7-4300-a7b7-6963173bbcb1_NESD1537%20Health%20Protection%20ARHAI%20Resources%20ACC.pdf?sv=2018-03-28&sr=b&sig=X9tSzJAj6mjJV1CCJQZW0NJFG4OL4ysRxqgQZHGVguY%3D&st=2022-05-19T12%3A52%3A24Z&se=2022-05-19T13%3A57%3A24Z&sp=r) |  |
| Fire Safety [Fire safety (hse.gov.uk)](https://www.hse.gov.uk/toolbox/fire.htm)  |  |
| Information Governance [Information Governance (scot.nhs.uk)](https://www.informationgovernance.scot.nhs.uk/)  |  |
| Manual Handling |  |
| Equality, Diversity and Rights [Manager's role in equality and diversity | Turas | Learn (nhs.scot)](https://learn.nes.nhs.scot/6705/leadership-and-management-zone/management-matters/managing-and-leading-in-organisations/manager-s-role-in-equality-and-diversity)  |  |
| Management of Aggression |  |
| Infection Control [Preventing infections in general practice | Turas | Learn (nhs.scot)](https://learn.nes.nhs.scot/7723/infection-prevention-and-control-ipc-zone/preventing-infection-in-care/preventing-infections-in-general-practice)  |  |
| COSHH |  |
| Basic Life Support  |  |
| Whistleblowing Policy |  |
|  [Business continuity template.docx](https://scottish-my.sharepoint.com/%3Aw%3A/g/personal/victoria_clark5_nes_scot_nhs_uk/EXqZtXgv9MVGllh_sC_XVQ8BwDNmduasG5FHp8byPgd-jw?e=DTykBw) or your own Business Continuity Plan |  |
| Practitioner Services – who to contact [Get in touch with our registration teams | National Services Scotland (nhs.scot)](https://www.nss.nhs.scot/medical-services/patient-registration-and-medical-records/get-in-touch-with-our-registration-teams/) |  |

**IMPORTANT TELEPHONE NUMBERS**

|  |  |
| --- | --- |
| VISION/ EMIS SERVICE DESK |  |
| MICROTECH SERVICE DESK |  |
| IT FACILITATORS |  |
| GP IT TEAM |  |
| PRIMARY CARE MANAGER (+ Name) |  |
| Local coordinator (+ Name) |  |
|  |  |

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| **Manager Preparation** |
| **Key priorities** | Focus the manager on the key priorities for the first month.Introduce the priorities for the following 2 months.Establish the manager’s freedom to determine own working methods.Establish any immediate training needs and maintain a list of identified needs over the next 6 months.Maintain a regular contact. |  |



**Review- At the End of Week 1**

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| **At this Review:**  |
| Line Manager/Mentor to ensure new employee has started to sign off Induction Pack. |
| Line Manger/Mentor to ensure new employee has completed some of the recommended training  |
| Discuss any concerns, feedback or support required   |
| **Summary of Discussion:**  |
|         |
| **Action Required:**  |
|          |
| Employee’s Signature  |   | Date  |   |
| Line Manager’s Signature  |   | Date  |   |

**Review- At the End of Month 1**

|  |
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| **At this Review:**  |
| Discuss achievements and overall performance during the first month. Confirm completion of all core and role specific recommended training. Review the induction experience. Agree objectives for the next two months.   |
| **Summary of Discussion:**  |
|           |
| **New/ Additional Action Required:**  |
|         |
| Employee’s Signature  |   | Date:  |   |
| Line Manager’s Signature  |   | Date:  |   |

**Helpful resources:**

GMS Contract 2018: [GMS contract: 2018 - gov.scot (www.gov.scot)](https://www.gov.scot/publications/gms-contract-scotland/)

Statement of Financial entitlement:

 [GMS Statement of Financial Entitlements 2020-21 - final (scot.nhs.uk)](https://www.sehd.scot.nhs.uk/publications/GMS_Statement_of_Financial_Entitlements_2020-21.pdf)

Practitioner Services: [Get in touch with our registration teams | National Services Scotland (nhs.scot)](https://www.nss.nhs.scot/medical-services/patient-registration-and-medical-records/get-in-touch-with-our-registration-teams/)

**NES Practice Manager Training Courses:**

The Practice Manager Vocational Training Scheme:

 [General Practice Managers Vocational Training Scheme | Scotland Deanery (nhs.scot)](https://www.scotlanddeanery.nhs.scot/your-development/practice-manager-development/general-practice-managers-vocational-training-scheme/)

Supervisory Management in General Practice:

[Scottish Practice Management Development Network Conference (nhs.scot)](https://www.scotlanddeanery.nhs.scot/your-development/practice-manager-development/supervisory-management-in-general-practice-programme/)

Menu for PM development: [menu-for-learning.pdf (nhs.scot)](https://www.scotlanddeanery.nhs.scot/media/568464/menu-for-learning.pdf)

PMVTS leadership and management framework:

[pmvts-leadership-and-management-framework-1.pdf (nhs.scot)](https://www.scotlanddeanery.nhs.scot/media/568466/pmvts-leadership-and-management-framework-1.pdf)

New Practice Managers Introductory Events:

 <https://www.scotlanddeanery.nhs.scot/your-development/practice-manager-development/workshops-and-educational-events/>

**NES Practice Manager Team:** **practicemanager@nes.scot.nhs.uk**