\*\* Practice Name\*\*

Please save a copy BEFORE editing

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**

|  |  |  |  |
| --- | --- | --- | --- |
| **Staff Issues** | | | |
| **Item** | **Detail** | **Completed** | |
| **Holidays and time off** | Management of absences  Policy on absences  Recording and control  [Calculate holiday entitlement - GOV.UK (www.gov.uk)](https://www.gov.uk/calculate-your-holiday-entitlement) |  | |
| **Staff** | Structure chart  Staff records  Dress code  Formal communications process |  | |
| **Policies and Procedures** | All staff/ HR policies and procedure's location  Review process/ ownership  Process for recruiting staff |  | |
| **Resources** | Memberships and fees  Key NHS resources (SPPA, NES) |  | |
| **Locums – files/ contacts/ procedures** | requirements for employment  Retention of locum records  Payment  Training  Recruitment  Reference checking  Registration check: [The medical register - GMC (gmc-uk.org)](https://www.gmc-uk.org/registration-and-licensing/the-medical-register) |  | |
| **Payroll** | Software  Training on running the systems  Pay grades  Review process  Responsibilities |  | |
| **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 Registrars  Partnership contracts  Salaried GP contracts  Superannuation records and contributions |  | |
| **Staff files** | Location and content |  | |
| **Appraisal process** | Timetable and roles/ responsibilities  Clinician 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 Codes  Control centre  Out of hours key holding  Out of hours emergencies  Intruder/ fire alarms  Servicing arrangements  Records  Routine tests  Activation button locations | |  |
| **Buildings Insurances** | Buildings  Claims history and records  Special equipment/ all risks  Insurer contacts  Record locations | |  |
| **CCTV** | Locations  Software systems  Backup arrangements  Access requests  Storage locations  Servicing | |  |
| **Car parking** | Control/ Permissions/ problems  Access  Security | |  |
| **Content insurances** | Record locations  Claim history | |  |
| **Contractors** | Regular contractors  Agreements and records  Access to the premises | |  |
| **Equipment** | Inventory and location  Routine Servicing arrangements  Repairs | |  |
| **Heating** | Servicing contracts  Time clocks  Boiler location | |  |
| **Other insurance** | Locum etc | |  |
| **Security** | Opening/ locking up  Alarm codes | |  |
| **Suppliers** | Key suppliers and services | |  |
| **Telephony** | System basics  Voice recording and backup  System management information | |  |
| **Waste** | Contractors  Servicing  Costs. Documentation. Record locations | |  |
| **Compliments and Complaints** | | | |
| **Service standards** | Practice complaints policy  NHS complaints procedure  Significant event procedures | |  |
| **Records** | Location and review | |  |
| **Review and resolution process** | Complaints involving partners  Complaints re third parties  Role of the PM in review meetings | |  |
| **Computing** | | | |
| **Website** | Maintenance arrangements  Updating  Facilities  Management statistics | |  |
| **Network** | Structure and access across the network  Location of key files and resources  Access rights | |  |
| **Back-up arrangements** | Role  Procedure  Protocols  Documentation  Servers and locations | |  |
| **Access and security** | Passwords and personal access  Staff access rights | |  |
| **Protocols and procedures** | Location and provide for reading and review | |  |
| **Directory structure** | Own PC directory structure for file locations  Key files across the network | |  |
| **File locations** | Backup drives  Essential/ critical files | |  |
| **Intranet** |  | |  |
| **Clinical System introduction** | Introductory overview  Arrange training on clinical system  Web accessed modules  Reports and management information  Searches | |  |
| **Email facilities** | Passwords and access instructions  Policies for use. | |  |
| **Hardware/ software requirements** |  | |  |

|  |  |  |
| --- | --- | --- |
| **Finance** | | |
| **Accountant** | Introduce to accountant  Provide accountants contact details  Introduce to accountancy software  Arrange training course if necessary |  |
| **Bank/ Banking signatories** | Introduce to bank  Review signatories  Provide bank records/ statements  Reconciliation procedures  Expenditure records and control  Direct debit records and control |  |
| **Income streams** | Contract  SLA  Reimbursements  PSD:  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)  Prescribing  Private services + fees  Enhanced services |  |
| **Enhanced services** |  |  |
| **Professional insurances** | Defence union  Locum insurance |  |
| **Software** | Payroll  Forecasting |  |
| **Invoicing and petty cash** | Systems and records  Reconciliations procedures  Incorporation into accounts |  |
| **Forecasting and analysis** | Long term financial planning |  |
| **Review and reporting system** | Finance partner  Clarity 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. |  |

|  |  |  |
| --- | --- | --- |
| **Partnership Issues** | | |
| **Contract basics** | GMS/PMS |  |
| **Drawings and payment** | Amounts/ review process |  |
| **Registrations** | GMC  PVG [Apply for PVG - mygov.scot](https://www.mygov.scot/apply-for-pvg)  Annual checks  Record keeping |  |
| **Meetings** | Frequency  Role  Attendees  Minutes |  |
| **Loans and mortgages** | Overview and management  Payment process and termination dates |  |
| **Partnership structure** | Seniority and control  Voting rights  Partners plans (e.g., retirement) |  |
| **Private earnings** | Retention  Individual partners activities |  |
| **General** | | |
| **Patient Group Directives** | Location and use  Updating  Responsibilities  List of PGDs -[Publications - Public Health Scotland](https://publichealthscotland.scot/publications/?q=&fq=phs_publication_type%3APatient+Group+Direction%23) |  |
| **Nurse Registrations** | Annual update requirement  Annual 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 coordinators  Introduce 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) |  |

|  |  |
| --- | --- |
| **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/:w:/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) |  |
|  |  |

|  |  |  |
| --- | --- | --- |
| **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. |  |

Logo, calendar, company name

Description automatically generated

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

|  |  |  |  |
| --- | --- | --- | --- |
| **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**

|  |  |  |  |
| --- | --- | --- | --- |
| **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**](mailto:practicemanager@nes.scot.nhs.uk)