Policy and Procedure Practice Manual for General Practices

Introduction and instructions for use

Based on the Royal Australian College of General Practitioners Standards for General Practices (4th edition)
Acknowledgements

Practice Assist acknowledges the Brisbane Division of General Practice as the original developers of this document and its following chapters. Permission to revise the original resource (which was dated 2008) to meet the current needs of Western Australian General Practices and the Royal Australian College of General Practitioners (RACGP) Standards for General Practices (4th edition) (the Standards) was kindly granted to Rural Health West in 2014, by the present-day copyright holders, Metro North Brisbane Medicare Local.

Disclaimer

Whilst every effort has been taken to ensure this document and its chapters reflect current best and quality practices by Australian health care standards and accords with the Standards, Practice Assist:

- Provides this publication as a general guide only and recommends practices seek professional advice where required to suit specific individual needs and/or circumstances.
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References


1. What are policies and procedures?

**Policies** are a set of principles and guidelines, goals, objectives and recommendations to direct the actions of staff in practice management. For example – they explain what you are going to do.

**Procedures** are a fixed, step-by-step sequence of activities that must be followed in the same order to correctly perform a task. For example – they explain how you are going to do it.

2. Interaction with the RACGP Standards for General Practices

The Policy and Procedure Practice Manual has been created based on the model of the Royal Australian College of General Practitioners (RACGP) Standards for General Practices: 4th edition (the Standards).

- Each chapter of the manual correlates with a section of the Standards.
- Each ‘criterion’ of the Standards is addressed within the related chapter.

It is the intent of the manual that, by working your way through it and completing a comprehensive set of policies and procedures, each of the Standards will be met.

3. Purpose of the Policy and Procedure Practice Manual

The purpose of this set of policies and procedures is to provide a guide and instructions to document the policies and procedures of your general practice to ensure the consistent provision of services to patients and to facilitate quality care.

In any business, the policies and procedures should be regarded as living documents and ideally will be reviewed and revised on a regular basis with documentation updated as necessary.

This document is current at the final proofing stages, dated November 2014. Legislation, best practice standards and contact details cannot be guaranteed as correct after this date.

Practice Assist recommends that general practices modify this document to reflect the nature of their individual policies and procedures. It is also recommended that you use this manual in conjunction with other resources available from Practice Assist, the RACGP, Australian General Practice Accreditation Limited (AGPAL), GPA Accreditation Plus, the Australian Health Professionals Registration Authority (AHPRA), the Australian Medical Council (AMC) and other professional bodies.

Practices are encouraged to add any practice or location specific policies, procedures, templates, checklists and forms to their policies and procedures.

4. Document control

A complete set of policies and procedures should include a document control plan.

At a minimum, this should include setting up an index, recording the currency and circulation of a document, when it was written, and a record of when the document is due for review.

Practice Assist suggests recording the following within each of your policies and procedures:

- The ‘current at’ date, document title and the page number.
- Documents that are subject to continuing review should include history of revision, ie:
  - Version 1 - Current at 1 December 2014
  - Version 2 - Current at 1 December 2015
- A table of contents for documents that have more than 20 pages.
- Sensitive and confidential documents should bear appropriate marking.
5. Personalisation of the document

Practice details

Throughout the template policy and procedure practice manual, there are sections where the practice will be required to insert particular personal information. These areas are identified as bold magenta italic underlined text.

For example: <location of pharmaceuticals and medical consumables>

Location of a related policy and procedure

In some cases, a policy and procedure may have very similar characteristics to another, or there may be additional related information available. In these cases, related policies and procedures will be referred to in blue-grey bold italics.

For example: Practice services, Chapter 1.2 - Triage

Templates, forms and checklists

Various templates and checklists are referred to throughout the policies and procedures. Where we have created a version for your use, these are made available in Chapter 6: Template, forms and checklists.

Where a policy or procedure has a related template form, checklist or letter, this will be referred to in capital letters, apple-green, underlined, italic letters.

For example: MEDICAL SUPPLIES REVIEW LOGBOOK

Options

Throughout the manual, there are multiple options available to choose from or modify to suit your particular practice policies and procedures. Many of the options provided are seen in mainstream general practice. You may also write your own policy or procedure if it differs from those suggested. Delete the option(s) you are not using.

For example:

1.4 Employment contracts and independent contractors

Our practice recognises that the state and national industrial relations systems each have different employment laws, awards and minimum conditions. Employment agreements are required to meet state or federal legislation and incorporate the benefits.

The Western Australian state system is regulated by the Industrial Relations Act and Minimum Condition of Employment Act and state awards apply.

The national system is regulated by the Fair Work Act and national employment standards apply.

Select the most appropriate option for your practice

Our practice is governed by the minimum conditions of the:

<Option 1>

Western Australian state system and the Industrial Relations Act and Minimum Condition of Employment Act.

<Option 2>

National Australian system and the Fair Work Act and the ten national employment standards apply.
Styles

The policies and procedures have been created using Microsoft (MS) Word formatting tools to create:

- Styles
- Headings
- Table of contents
- Tables

Using these styles consistently maintains the integrity of the document and will allow quick and easy application of formatting choices throughout your document.

A style is a set of standard formatting choices such as individual characteristics of a heading, the body of the document, table settings, fonts, colours, alignment, spacing etc.

Each of the styles also interacts with the MS Word ‘References’ functions, and creates an automatic and hyperlinked table of contents, which can be updated to reflect any changes to page numbers or chapter titles by clicking the refresh button. To follow the hyperlinked page number, hold the CTRL key on your keyboard and click the left pointer on the mouse.

Headings, fonts and bullet points are just some of the styles set in the template policies and procedures. Right click on a style in the toolbar to select all text in that style and modify the settings.

To follow a hyperlink, hover your mouse pointer over the page number, hold the Ctrl key on the keyboard and left click with your mouse to go directly to that page.

Use the built-in table of contents which is enabled when correctly using styles.

If your page numbers change due to editing your document, once finished, right click on the existing table of contents and select update field followed by update entire table.

Go to references in the toolbar, and then table of contents, to customise your settings.