Induction Program
Practice Manager/2IC

To help integrate new employees into your practice, it's important to follow an induction process that explains all the information they need to perform their role effectively, efficiently and safely.

This template outlines the induction process for a Practice Manager/2IC with a training checklist to ensure every aspect is covered and signed off by the inductee and trainer during the induction.

Welcome to the practice	Inductee	Trainer	Date
Introduction to other staff members			
Tour of the practice			
Personnel administration – direct report, hours of work, salary, position description, performance review, tax declaration form, payment arrangements, ongoing training and immunisation status			
Collection of required documentation			
Overview of organisational chart			
About the culture of the practice			
The importance of asking questions			
How and where to access policies and procedures			
Information about available resources			

About the practice	Inductee	Trainer	Date
Background and history of the practice			
Practice profile – number of GPs, special interests and patient demographic			
Services provided by the practice			
Operating hours of the practice			
Opening and closing procedures			
Security company – access codes and provision of keys (including signing the key register)			
Accreditation – RACGP standards			

Practice administration	Inductee	Trainer	Date
Introduction to the front desk			
How to handle incoming and outgoing correspondence			
Procedures for ordering stationery and other office supplies			
Process for distributing faxes			
Updating headers and footers on practice stationery			
Business cards			
Door signage			
Doctor stamp			

Updating the website/Instagram (bio, about us, services)			
Advertising – public notices			
Medical Deputising Service			
Notifying and updating services of doctors' details, including WAPHA			
Updating reception with new provider details (contact, provider number, prescriber number, allergies etc.)			
Process for organising drug rep appointments			
Instructions for use of business equipment			
Instructions for use of medical equipment			

Billing procedures	Inductee	Trainer	Date
Details about the practice's consultation fees			
Information about billing arrangements			
List of common item numbers			

Telephone procedures	Inductee	Trainer	Date
How to place callers on hold, transfer calls and program the phone system			
When to transfer telephone calls to GPs and other clinical staff			
Information about each GP's policy for receiving and returning patient telephone calls			
The importance of not interrupting patient consultations unless it is an 'urgent situation'			
Definition of an 'urgent situation'			
How to take and deliver messages			

Appointment management	Inductee	Trainer	Date
Information about the appointment system			
How to set up sessions and appointment times in the appointment book			
How to determine the urgency of patient healthcare needs			
How to accommodate patients with urgent, non-urgent, complex, planned chronic care or preventative healthcare needs			
How to determine the most appropriate length and time of a consultation at the point of booking			
Types of appointments available at the practice			
Arrangements for home and other visits			
Arrangements for care outside of normal opening hours			
Process for handling new patients at the practice			
How to offer patients the opportunity to request their preferred GP and other clinical staff			
How to book appointments			
How to greet patients when they attend their scheduled appointment			
The importance of informing patients of any extended waiting times			
Process for handling 'did not attend' and cancelled appointments			

Triage and medical emergencies	Inductee	Trainer	Date
How to determine the level of urgency of patient healthcare needs			
How to handle a medical emergency – on the telephone or in person with and without a GP in attendance			
How to identify and care for patients in distress			

Patient management	Inductee	Trainer	Date
The importance of respecting patient rights			
Policies and guidelines on open disclosure			
Obtaining patient consent for the presence of a third party during their consultation			
The importance of treating patients with courtesy and respect			
Policies and guidelines on ethical dilemmas			
How to provide important information to patients			
How to handle difficult or angry patients			
How to handle patient requests for repeat prescriptions and referrals			
How to handle incoming and outgoing pathology			
Each GP's policy for receiving and returning patient emails			
How to access services to help communicate with patients who speak other languages and/or those with a disability			
Information about local health, disability and community services			
List of local hospitals			
List of pathology and radiology providers			

Patient health records and confidentiality	Inductee	Trainer	Date
The importance of privacy, confidentiality and security of patient health information (verbal, written and electronic)			
Process for handling results, reports and clinical correspondence			
Information about the practice recall and reminder system			
Process for referrals			
Clinical guidelines (recalls and reminders, eHealth practice policy)			
Information on key public health regulations (such as reporting requirements for communicable diseases)			
Policy for retention of records and archiving			
Process for transferring patient health records			
Security policy for prescription pads and computer-generated prescription paper, letterhead, medical certificates, medications, patient health records and related patient health information, including accounts			

Computer administration	Inductee	Trainer	Date
Information about privacy, confidentiality and security issues			
Allocating the appropriate passwords and permissions			
Notifying software provider of new user			
Notifying secure messaging provider of additional providers			

How to lock the computer and activate screensavers			
Training in clinical and management software programs and the required information for each patient health record			
Training, use and updating of individual PRODA, HPOS, My Health Record, NASH PKI Site Certificates, Secure Messaging, STS Address Book, Electronic and Smart referrals, CAT4/Top Bar, AIR, MBS and PIP			
Training in accessing the Health Provider Portal (The Viewer)			
Training in use of HealthPathways			
Practice's IT provider to set up email address and access to the computer network and remote login			
How to set up preferred doctor templates (e.g. referral letter and medical certificates)			
Policy for use of email			
Policy for use of social media			
Computer security procedures – firewall, anti-virus and disaster recovery			
How to scan documents and digital images			
Procedures for backing up electronic information			
Procedures for securely transferring patient health information over a public network			

Human resource management	Inductee	Trainer	Date
Staff code of conduct			
Staff requirements for continuing professional development			
Management of staff rosters			
Information and training of processing staff and doctor pays			
Policy for staff notifying when they are unable to work			
Induction of staff and updating the induction training checklist			
Preferences of doctors			
Policy for equal opportunity, sexual harassment and bullying			
Procedure and frequency of staff and clinical meetings			
What to do in the event of an incident or injury			
Policy for lifting heavy objects			
Policy for smoking, drugs and alcohol in the practice			
How to handle violent situations in the workplace			
Ways to maintain staff health and wellbeing			
Current immunisation status known, documented and appropriate to the duties identified and arranged (by consent)			
How to handle non-medical emergencies (e.g. fire and bomb threats)			

Treatment room and facilities	Inductee	Trainer	Date
Process for using and maintaining medical practice equipment (e.g. ECG and spirometry)			
Process for storing, ordering, documenting and disposing of controlled and restricted drugs (e.g. safe, key and protocols for S8 drugs)			
Process for storing, ordering, documenting and disposing of Schedule 4			

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	Inductee	Trainer	Date
medicines and pharmaceutical samples			
Process for checking, rotating and resupplying perishable medical supplies			
Doctor's bag orders, prescription paper and pads			
Location and use of emergency trolley, supplies and doctor's bag			

Cold chain management	Inductee	Trainer	Date
Process for receiving and transporting vaccines			
Information about the importance of managing the cold chain			
How to manage the cold chain			
Name of the staff member with primary responsibility for managing the cold chain			
The actions to take in the event of a cold chain breach			
Location of Vaccine Management Protocol			
Location of vaccine esky, ice packs, packing materials, thermometer and instructions on how to pack a vaccine esky			

Continuous quality improvement	Inductee	Trainer	Date
Information about practice accreditation and what that means			
Information about how to provide input and feedback for improving business operations and business planning			
Process for notifiable data breaches			
PIP QI program, guidelines, contracts, reporting requirements			
Name of the staff member with primary responsibility for infection prevention and control			
Process and name of the staff member responsible for managing patient feedback			
Process and name of the staff member responsible for the investigation and resolution of complaints			
Process and name of the staff member responsible for leading clinical improvements			
Process and name of the staff member responsible for leading risk management			

Occupational health and safety (OH&S)	Inductee	Trainer	Date
Objectives of the OH&S policy			
Responsibilities and obligations of management			
Responsibilities and obligations of employees			
Responsibilities and obligations of contractors			
How to identify any unforeseeable risk or hazards that could affect staff or other people at the practice			
Your responsibility in training and educating staff about any OH&S issues that affect or could affect them at work			
Supervision and personal protective equipment			
Policy for completing monthly workplace health and safety checks			
Policy for fitness for work/duty			

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Policy for incident and injury reporting			
Procedure for emergencies			
Procedure for bomb threats			
Procedure for armed hold-up/robbery			
Procedure for violence in the workplace			
Procedure for OH&S complaints			
Procedure for workers' compensation			
Procedure for hazard and risk management and how to complete incident report forms			
Policy and procedure for risk assessment, controlling a risk, regular review and documentation			
Policy for no smoking			
Policy and procedure for staff immunisation register			
Procedure for manual cleaning and sterilisation of equipment			
Procedure for cleaning up spills of contaminated waste			
Procedure for infection control for potential infectious patients			
Procedure for disposal of clinical waste			

Infection prevention and control	Inductee	Trainer	Date
Principles of infection prevention and control			
Policy and procedure for risk management, reporting, investigating and analysis of near misses, slips, lapses, mistakes or adverse events to improve patient and staff safety			
Participation in continued education and identification of training requirements			
Policy and procedure for management of sharps injury			
Policy and procedure for management of blood and body-substance spills			
Correct hand washing and hand hygiene techniques			
Practice cleaning schedule			
How to ensure instruments are sterile at point of use			
Policy and procedure for safe storage and disposal of clinical waste			
Policy and procedure for handling, sorting, laundering and storing linen			
Standard and additional precautions			
Disease prevention in the workplace by serology and vaccination			
Policy and procedure for handling and using chemicals, including instrument grade detergents and Safety Data Sheets (SDS)			
Policy and procedure for safe handling of pathology specimens			
Correct use of personal protective equipment			
Policy and procedures for sterilisation including pre-cleaning of instruments, cleaning of instruments, drying of instruments and packaging of instruments			
How to use the steriliser and access the manufacturer's operator manual			
Checking and replacing the steriliser printer paper			
Loading the steriliser			
Unloading the steriliser			

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Storage of sterile stock			
Recording the cycle information			
Identification of a failed cycle and the appropriate action			
Daily, weekly, monthly and annual maintenance of the steriliser			
Servicing and calibration			
Annual validation			
Maintaining stock sterility through correct storage and rotation			

*If there are areas where the inductee is not competent, the staff member must receive further training until competencies have been achieved.

Declaration

I _____ have received explanation or training in all the areas listed in this induction program. I acknowledge and understand the content of the items above, and I agree to abide by the processes detailed in the policy and procedure manual.

I understand that in performing the responsibilities of my role, I will have access to confidential information relating to patients' health and the practice's business. I agree that I will not disclose any confidential information during the period of my employment, or after my termination (however caused), to any person not authorised to receive such confidential information.

I undertake not to access, use, disclose, copy, reproduce or retain confidential information for any purposes other than required to perform my role. I acknowledge that to do so would be in breach of the Privacy Act 1988.

I have read and understood the practice's privacy policy and agree to abide by the procedures used by this practice to ensure there are no breaches of privacy.

Employee name in full: _____

Signature of employee: _____   Date: _____

Employer name in full: _____

Signature of employer: _____   Date: _____

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