Add Practice details

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**Employee’s Name:**

**Trainer’s Name:**

**Start date: ……………………………………………………………**

Practice Administrator to arrange smart card, and set up computer access and email account, e learning training for (name of provider), telephone system access, Intranet access, WhatsApp access.

When smart card has arrived, set up passwords / login for windows and TPP/Emis

**1** For the first 6 weeks the trainer and new employee will meet for one hour per week (longer if required) to learn about specific tasks and discuss any problems or queries that may have occurred.

**2** After 6 weeks, trainee and trainer will meet on a regular basis to review progress and tailor any further training to the individual employee’s needs.

**3** During the 6-month probationary period, the trainee will meet with the Practice Manager and Team Leader for reviews at 1 and 3 months, and at the end of the 6-month probationary period for a final review.

**4** The trainee will continue to be supported by all the members of the Practice Team, eg explaining any new protocols/procedures and discussing any queries or problems that arise.

**5** It should be recognised that the following sections will not necessarily be followed in sequence; according to the work pattern and responsibilities of the trainee, some bits from each section may need to be prioritised, and also highlighted when specific examples are arising in the Surgery.

*Please note – this induction does not cover every aspect of the role.*

*Training in this type of job is an on-going process and it would be impossible to cover everything in detail in three months.*

**PART 1 – INFORMATION**

**Date: ……………………..**

1. The Trainee to be in possession of job description and contract.
2. The trainee to have completed forms for HMRC and payroll provider.
3. The Practice Administrator will have given/explained the following:

* Method and date of pay
* Pension scheme details
* Overtime / lieu time
* Appraisals
* Practice and Team Meetings
* Rotas / hours of work
* Holiday entitlement / protocol / procedures
* Sickness protocol
* Freedom to speak up guardian
* Health and safety officers
* Fire officers
* Clinical leads - list
* Car Parking

Trainer to explain how the training is going to run and provide information about:

* Tour of the surgery
* Organisational structure - Who works here and what is their role
* PCN – ARRS staff
* Confidentiality
* Information governance
* Policies and procedures – where they are found
* Time keeping
* Personal calls / use of mobile phones
* Uniform / standard of dress
* Storage of bags / coats
* Kitchen use
* Door security codes/access/key or fob
* Alarm code
* Use of email / internet / Intranet / WhatsApp
* Importance of teamwork

Signature of Trainer: …………………………………………………………………………………………….

**PART 2 – RECEPTIONISTS**

**Date: ……………………..**

1 Review items in part 1 and trainer to answer any questions.

2 Trainer to:

* Teach how to use telephone system
* What happens at lunch time, prior to 8am and after 6.30pm

Asking Patients Questions

* Why we need to ask so many questions
* Types of questions to ask to get the information you require/using the S1 Triage template
* How much medical advice Reception staff can give
* Minor Injury Units information / 111/ Pharmacy First / Extended access
* Tasks and notifications – when to use
* Quick Notes

Home Visit Requests

* What to ask the caller
* What to say to caller re when GP will visit etc
* Message List/ Visits List, print out of summary

Waiting Lists

* Why we have the lists
* How to add patient to a waiting list
* Making a booking from a waiting list

Calling an Ambulance

* How to call an urgent ambulance

Signature of Trainer: …………………………………………………………………………………………….

**PART 3 – COMPUTER SYSTEM - GP APPOINTMENTS**

**Date: ……………………..**

1 Review items in part 2 and trainer to answer any questions.

2 Explanation of opening hours, Out of Hours service (how they keep us informed of patients they see).

3 Trainer to check trainee understands:

* Turning on the computer
* Accessing SystmOne
* The appointment screen layout
* How to retrieve patient records (TPP and Lloyd George)
* Changing to different screen by day / date
* Checking a patient in
* Purpose and demonstration of self check-in screen
* Explanation of GP appointments, eg embargoes / urgent slots etc

4 Trainer to ensure trainee understands how to:

* Book routine appointments with a GP
* What type of questions to ask patient, eg for nurse appts so correct length of appointment time is booked
* Cancel an appointment
* Move an appointment
* Make a comment on the appointment booking and use initials
* Book a telephone appointment
* Book textual appointment
* Book with extended access/hubs

Signature of Trainer: …………………………………………………………………………………………….

**PART 4 – ABOUT NURSE AND HEALTH CARE ASSISTANT (HCA) APPOINTMENTS / COMMUNITY NURSES**

**Date: ……………………..**

1 Review items in part 3 and trainer to answer any questions.

2 Trainer to ensure trainee understands:

Nurse/HCA appointments

* Who can do what – Using appointment templates

Additional Roles (ARRS)

* Additional roles (ARRS) – understanding their roles
* how to book appointments

Blood Tests – Trainer to explain:

* Process of a blood test – from booking appointment to receiving result
* Collection by courier
* Booking blood test appointments
* How to access results on S1
* Urgent blood tests

Other Path Samples

* What other samples can be processed – correct pots
* Protocol for taking samples at the desk
* Afternoon samples (occasional) – what to do

Giving out Results

* What information can we give / Patient dissension from record sharing
* Confidentiality
* Tact and diplomacy

COMMUNITY NURSES

* Referrals - arranging appointments for housebound patients

Signature of Trainer: …………………………………………………………………………………………….

**PART 5 – PAPERWORK**

**Date: ……………………..**

1. Review items in part 4 and trainer to answer any questions.

Reception Emails Inbox and Accurx

* What to do with emails received – what to print, forward, action
* Accurx – sending messages and managing inbox

Repeat Prescriptions (if applicable)

* The process from start to finish / ETP / Allowing 5 days
* How to access information on S1
* How to interpret “Recall” dates re needing meds
* Faxing prescriptions/tokens
* Care home collections of information

Trainer to Explain

* Registration Packs
* Temporary Registration of patients / patients from abroad
* Change of name / address / phone numbers form
* Private work - charges
* Receiving deliveries eg vaccines for fridge
* Post system
* Printing next day’s appointment lists
* Stationery cupboard
* Medical supplies cupboard
* Cleaner’s cupboard
* COMPLAINTS – spotting them, reporting potential issues, procedure

Signature of Trainer: …………………………………………………………………………………………….

**PART 6– FURTHER TRAINING**

**Date: ……………………..**

1. Review items in part 5 and trainer to answer any questions.

Trainer may wish to discuss the following SPECIFIC areas if appropriate to the staff member

(delete as appropriate)

* Emailing out - referrals
* PPA
* Reports preparation and completion
* Carers List
* EDI
* Invoices
* Retinal Screening
* Doctors’ rooms supplies
* Summarising
* Prescriptions
* Use of Outlook Task Reminders
* Typing of referrals / letters
* ERS – electronic referral system (Choose & Book) system
* Admin Responsibilities list for reference

Signature of Trainer: …………………………………………………………………………………………….