**NEW TO ELFT**

**Practice Manager Transitional Training Programme**

This is a training programme and induction pack designed to support the learning and development of leaders from outside of ELFT transitioning into Practice Management within the Primary Care Directorate

|  |  |
| --- | --- |
| **Name** |  |
| **Role** |  |
| **Start Date** |  |
| **Line Manager** |  |
| **Trainee supervisors and competency sign off lead** |  |

**The difference between a practice manager in the ELFT model and the practice manager in a partnership model**

|  |  |  |
| --- | --- | --- |
| Practice Manager in a partnership (high level) | Practice Manager in an ELFT practice | Things done by supporting functions in the ELFT model |
| * Drawings * Book-keeping and paying invoices * Year-end accounts * Claiming and invoicing * Buildings and maintenance * PCN managerial lead * CCG Managerial link * Managing practice publications * Performance & Governance of the practice * CQC * Contract management * Human Resources - Recruitment and HR process such as sickness, etc * Compliments & Complaints | * Management of non-clinical staff * Performance lead * Finance lead * PCN managerial lead * CCG Managerial link * Compliments & Complaints * Managing practice website * CQC * Line Management Support * Oversight of local risks and maintenance of Practice risk register * Review all incidents and ensure lessons learned | * Recruitment – supported by people and culture * Practice finances supported by Finance business partner – there is no paying of wages, booking etc in the ELFT model * Claims / invoices – done by income and data manager * Health and safety * Quality and compliance supported by quality manager * Responding to NHS choices * Human Resource - Guidance and advise |

**Practice Manager key skills framework**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Key Skills / training** | **Training provided by** | **Date of course / programmes/** | **Signed off by inductor** | **Signed off by line manager** |
| Primary Care Directorate Leadership Programme | ELFT |  |  |  |
| The PC in Practice Leadership Programme | In development |  |  |  |
| Lunch and learn – Covid-19 risk assessments | P&C |  |  |  |
| Lunch and learn – How to carry out wellbeing assessments | P&C |  |  |  |
| How to carry out supervision and using structured supervision approaches | P&C |  |  |  |
| How to read budget statement training | Finance |  |  |  |
| Managing Sickness and Absence Training | P&C |  |  |  |
| Appraisal Training for Managers | P&C |  |  |  |
| Managing Capability and Performance Training | P&C |  |  |  |
| Managing Work life Balance Requests | P&C |  |  |  |
| Managing Disciplinary. Grievance and Dignity at Work Processes Training | P&C |  |  |  |
| Investigating Officers Training (Disciplinary/Grievance/Dignity at Work) | P&C |  |  |  |
| Access to medical records process for leads | Keisha |  |  |  |
| Understanding Serious Incident Investigations (co-reviewer duties) | Governance |  |  |  |
| Risk Officer Training (3 yearly) | Governance |  |  |  |
| Health roster training | P&C |  |  |  |
| Complaint’s training | Charlotte |  |  |  |
| IGDPR | Keisha |  |  |  |
| Trained in Envoy for reviewing patient feedback data | QA |  |  |  |
| Datix training | Joanne |  |  |  |
| Duty of Candour training | Governance |  |  |  |
| Has had oracle training | Finance |  |  |  |
| Has had training on the trust booking agency and bank systems | Finance |  |  |  |
| CQC readiness – has been trained to undertake peer review | QA |  |  |  |
| Care hill formula, weighted payments to practices, deprivation ranking and prevalence | P&C |  |  |  |
| GMS, PMS and APMS contract types and who can hold them | P&C |  |  |  |
| Boundaries, why a contractual boundary exists | P&C |  |  |  |
| What you need to do to extend or reduce your boundary | P&C |  |  |  |
| New patient registrations and contractual implications | P&C |  |  |  |
| Ghost patients and list cleansing | P&C |  |  |  |
| Violent and vexatious patients' deductions process | P&C |  |  |  |
| Special allocation scheme | P&C |  |  |  |
| Opening hours and contractual cover required | P&C |  |  |  |
| Payments for locums, maternity and sickness | P&C |  |  |  |
| The role of the CCG in contract managing | P&C |  |  |  |
| GP IT role of the CCG and NHS in the provision of GP IT systems | P&C |  |  |  |
| National extractions from clinical systems and coding | P&C |  |  |  |
| Rent and rates reimbursement, what is covered, what is not covered and how you claim | P&C |  |  |  |
| Exeter, PCSE and CQRS - what they are, what they tell you and how you use them | P&C |  |  |  |
| Annual eDec return | P&C |  |  |  |
| Annual NHSE complaints return | P&C |  |  |  |
| Directed enhanced services | P&C |  |  |  |
| Locally enhanced services | P&C |  |  |  |
| National enhanced services | P&C |  |  |  |
| Enhanced services commissioned by a GP Federation | P&C |  |  |  |
| Contractual requirement - PPG | P&C |  |  |  |
| Primary care network DES, ARRS, PCN participation payments, PCN admin payment, PCN clinical director payment | P&C |  |  |  |

**Key things you will need to know about any practice you are leading**

* Practice address
* Phone number
* Bypass phone number
* E-mail address
* Website
* Who the practices safeguarding lead is?
* Practice Code
* Practice Opening and Closing Times
* Signing in and out process
* Fire, Health and Safety information
* Health and Safety Lead
* Fire Marshall
* Fire protocol can be found…
* Shift Patterns
* Annual leave and changes to shifts
* Practice closures
* Telephone system at the practice
* Booking system at the practice
* DNA policy
* IT or Digital issues please contact
* Smartcards
* To raise a significant event / Patient safety incidents
* Housekeeper/cleaners
* Hand soap and sanitiser replenished by
* Our PPG / People participation
* Where policies and procedures are
* Meetings and governance structures
* Visitors’ policy
* Signing in and signing out policy
* Chaperone policy
* Incoming post process
* Home visit process
* Vaccines and responsibility
* Prescription safety
* Patient Safety Incident process
* Smartcard process
* Pathology process
* Home visits process
* Death’s process
* All deaths
* Who is your Housekeeper / Cleaning service and how to contact them
* Any IT or Digital issues please contact
* DNA policy

**Key external contacts and contact details you need to know about at any practice you are leading**

* Coroner
* Social Services
* Language Line
* District Nurses
* Palliative Care Team
* Local Hospitals
* Nearest A&E
* Eye Casualty
* GP Out of Hours Service
* Local CCG Website

**Key items you will need to know where to find in any practice and who is in charge of reviewing and overseeing**

* Fire exits
* Fire extinguishers
* Toilets
* Kitchen
* Stationery
* Printer paper
* Emergency bag with defibrillator and oxygen
* Prescription paper
* Sample bottles
* Urine dipsticks
* Tongue depressors
* Couch roll
* Speculums
* Spare sharps boxes
* Spillage kit (for urine, blood, vomit)
* RCGP Sepsis Toolkit
* Doctor’s bag for home visits

**Key figures you will need to know in any surgery**

* Lead GP
* Lead Nurse
* Nurses
* Vaccine Lead
* Resus Lead
* Admin team
* Pharmacists/Pharmacy technicians
* Prescribing lead
* Palliative care lead
* Carers Lead
* Caldicott Guardian at ELFT is
* Caldicott Guardian in house is
* Adult Safeguarding Team
* Adult Safeguarding in house
* Child Safeguarding Team
* Child Safeguarding in house
* FGM
* Information Governance Lead is
* GP Team (with special interests)
* Who works at this practice?
* What PCN additional roles you have

**Key induction areas, competencies and learning areas you were be emersed in**

|  |  |  |  |
| --- | --- | --- | --- |
| **Key area** | **Lead** | **Date** | **What you will know at the end of the session / section** |
| Introduction to the primary care directorate at ELFT.  this session will cover   * Directorate what it does * Who is in the directorate? * Governance structures * Meetings * Policies / procedures * Handbook * Extranet * Meetings * Support * Supervision * Access to K drive * DMT * PCNs * How the ELFT model differs from the traditional general practice model | Head of Operations |  | All about the primary care directorate and its underpinning governance structures and key documents for reference. |
| Introduction to General Practice Contracts | Extranet webinar |  |  |
| The primary care directorates annual plan | Director of Primary Care |  |  |
| Introduction to the Medical Director   * what they do and who they manage * the role of the Lead GP at an ELFT practice | Medical director |  |  |
| Introduction to the head of nursing   * what they do and who they manage * the role of the Lead Nurse at an ELFT practice | Head of nursing |  |  |
| Introduction to people and culture which will cover   * Line management * Forms and how to use them * Recruitment and selection * Sickness * Supervision in the primary care directorate | P&C BP |  |  |
| Introduction to QI in the primary care directorate | Improvement advisor |  |  |
| Introduction to people participation in the primary care directorate | PP Lead |  |  |
| Introduction to Finance and income Getting set up on oracle and authorised signatory database   * Access and how to read budget statements * Practice expenditure and income * Services the practice is signed up to * coding invoices and purchase orders | Finance partner |  |  |
| Temporary recruitment how to   * safer staffing calculator 52/72 per 1000 * Agency and bank * How to book * Guidelines * IR35 * Framework * Request forms to use and what to complete | Head of Operations |  | The process on how to book locum or bank staff |
| Introduction to performance  Will cover   * What gets captured and how * Reporting cycles * How the PM will be supported by the performance team * Setting up searches and running searches in EMIS and S1 | Head of Operations |  | The process on data collection and how to collect |
| Differences between smaller and larger GP Practices   * Admin and clinical teams in smaller practices and ways of working * Admin and clinical teams in larger practices and ways of working | Head of Operations |  | Shadowing teams to see how larger surgery comes to smaller |
| Introduction to the general practice support unit | Head of Operations |  |  |
| Introduction to the primary care skills academy @ELFT | Head of the skills academy |  |  |
| Introduction to the wellbeing champion in the primary care directorate | Wellbeing champion |  |  |
| Introduction to the care navigation procurement | Head of the skills academy |  | Connexus |
| Introduction to quality and governance  will cover   * PREM * Datix * Risk registers * Business continuity plans * Complaints / compliments * You said we did * PPG and engagement * Policies and procedures | Quality Manager |  |  |
| Introduction to contracts   * How contracting works at the trust * What you can and cannot sign for at a practice level * IG / DSA * Liaising with CCG and others re finances or contracts * PCN DES * Practice DES * APMS and GMS * PCN ARRS | Head of Operations |  |  |
| Performance in general practice   * National performance management of general practice * CCG performance management * Extractions * National GP data hub * National GP finance reporting * What indicators are measured * Action expected | Performance team |  |  |
| CQC in general practice   * How this works * The handbook * Peer review * Nigel’s surgery | See handbook with head of operations |  |  |

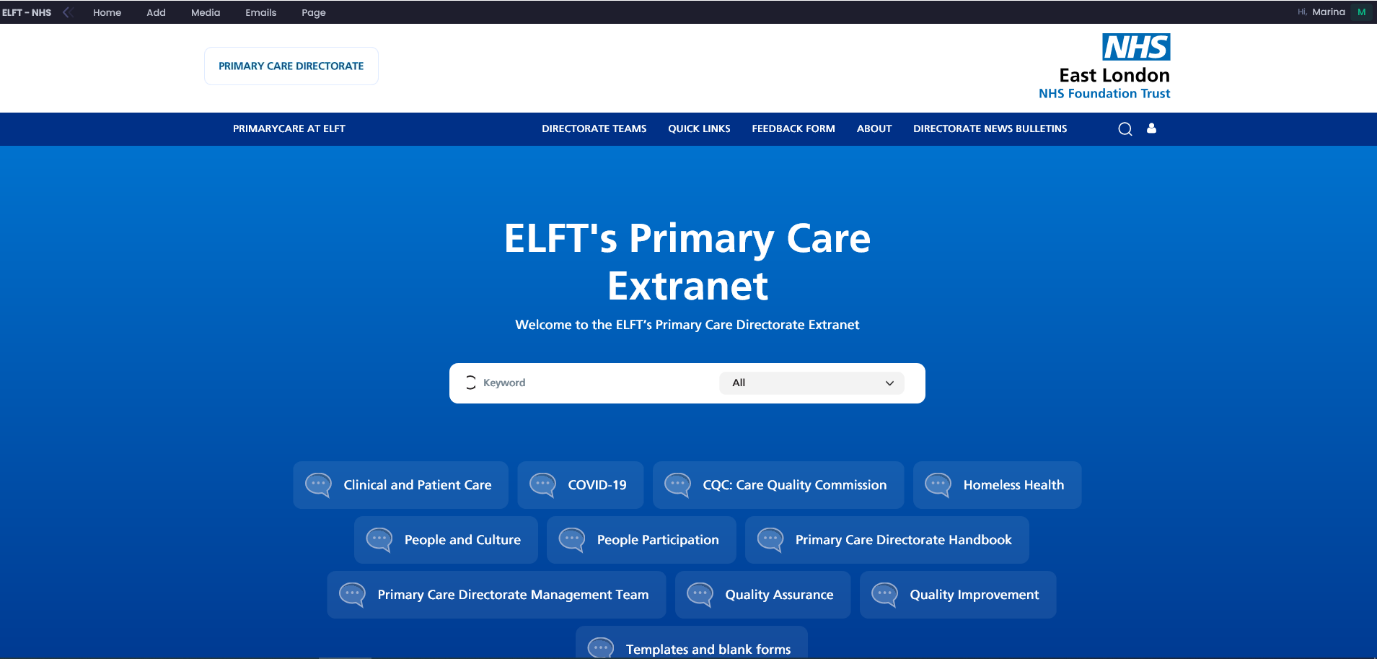
**You will be required to go and visit teams across the back office and understand how it works and how leads the teams**

|  |  |
| --- | --- |
| **ADMIN** | **What I have learnt and when I visited** |
| What are the clinical systems and how do they work? |  |
| What is summarising? What is the process on the Clinical System? |  |
| Registration Process and who is PCSE? |  |
| Deduction Process? |  |
| Clinical Records off site? |  |
| Non-NHS Work and What is the process? Price List |  |
| What is a complaint and how to process? |  |
| What is the prescription process and how to process a prescription? |  |
| **CLINICAL** | **What I have learnt and when I visited** |
| Services available to our patients |  |
| Services we have visit on site |  |
| Chaperone policy |  |
| MHRA Spreadsheet what it is and where it can be found… |  |
| List of palliative patients, vulnerable adults, vulnerable children is sent out via notification every month by… |  |
| A list of Priority Patients is kept… |  |
| Our carers register is kept by… |  |
| Clinical Audits |  |
| **How do I…** | **What I have learnt and when I visited** |
| Call a patient from the waiting room |  |
| Organise blood tests and advise the patient to get the results |  |
| Send urine/blood to the lab |  |
| Text a patient |  |
| Send a task |  |
| Record a death |  |
| How do I organise repeat prescriptions |  |
| How does Docman work in the practice |  |
| How are test results managed in the practice |  |
| Book a nurse appointment |  |
| All emergency equipment is checked daily by…  With the back up being… |  |
| **REFERRALS** | **What I have learnt and when I visited** |
| What is the Referral Process? |  |
| Refer to MDT |  |
| Refer for palliative care |  |
| Refer a patient – 2ww |  |
| Refer a patient – Urgent |  |
| Refer a patient - Routine |  |
| Refer to Physio |  |
| Refer to mental health teams |  |
| Refer to drug and alcohol services |  |
| Refer for X-rays |  |
| Refer for USS |  |
| Organise an ECG urgent/routine |  |
| Refer a patient for antenatal care |  |
| Organise a smear test |  |
| Home visits |  |
| Help a patient to access family planning |  |
| Pathology |  |
| **MEETINGS** | **What I have learnt and when I attended for induction** |
| Clinical Governance |  |
| Data |  |
| Primary Care Network |  |
| Full Staff |  |
| Nursing |  |
| Non-Clinical Staff |  |
| Other |  |

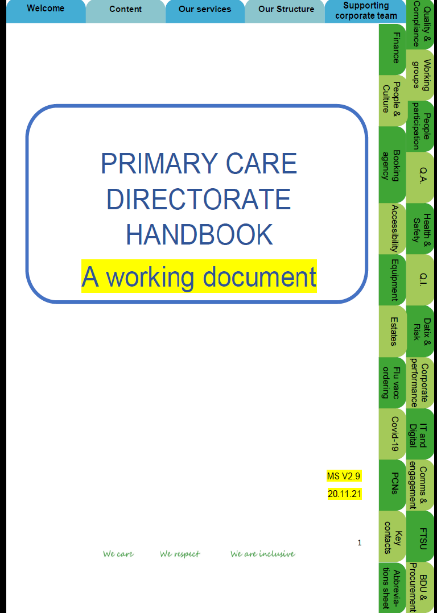
**Your best friend**

The primary care directorate over the last year has built its own extranet which is full of its own bespoke policies and procedures. Everything you could ever need is available at quick reference please create yourself an account and explore. Please use the feedback button to let us know if there is anything that you think is missing so we can look to create this. As this site is an extranet it can be entered home or at work and through any mobile device.

Please enter here: <https://elft.nhs.uk/primarycare>

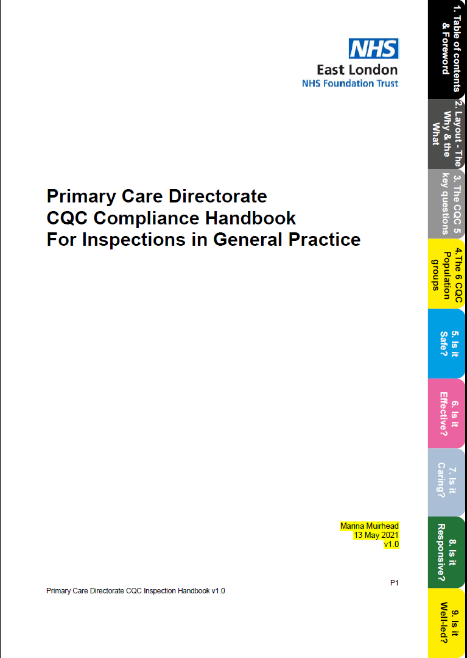


**Your best friend - Primary Care Directorate handbook** <https://elft.nhs.uk/PrimaryCare/resources/677/Primary-Care-Staff-Handbook#P227>

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**Your best friend - CQC compliance in primary care**

<https://elft.nhs.uk/PrimaryCare/resources/561/CQC-Handbook#P189>



**Induction meetings and key contacts to help you settle in**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Person** | **Role / function** | **Date meet** | **Phone Number** | **Email address** |
| Irfaan Ibne | Head of Operations |  |  |  |
| Emma Dirken | Practice Manager |  | 020 7247 0090 | emma.dirken@nhs.net |
| Louise Wilson | Practice Manager and Head of the Primary Care Skills Academy |  | 0207 909 4986 | louise.wilson70@nhs.net |
| Sultan Ahmed | Service Manager |  | 0208 536 2255 | sultan.ahmed1@nhs.net |
| Louise Cole | Practice Manager |  | 07494 206415 | louise.cole7@nhs.net |
| Lead GPs | N/A |  |  |  |
| Lead Nurses | N/A |  |  |  |
| Marina Muirhead | Director of Primary Care |  | 07717 418219 | marina.muirhead@nhs.net |
| Liz Dawon | Medical Director Primary Care |  | 07388 707359 | liz.dawson1@nhs.net |
| Mohit Venkataram | Executive Director of Commercial Development |  | 07852 766068 | mohit.venkataram@nhs.net |
| Shade Olutobi | Directorate People Business Partner |  | 07387 522 785 | shade.olutobi@nhs.net |
| Mairead Heslin | Directorate OD Business Partner |  | 07918 445678 | mairead.heslin1@nhs.net |
| Keely Smith | Directorate People Relations Advisor |  |  | keely.smith3@nhs.net |
| Alaa Alhamoud | Directorate Finance Manager |  | 074 3602 7536 | a.alhamoud@nhs.net |
| Joanne Alder Pavey | Directorate Quality and Governance Manager |  | 07785 695413 | [j.alder-pavey@nhs.net](mailto:j.alder-pavey@nhs.net) |
| Nicola Hoad | Directorate Development Manager |  | 07918 446170 | nicola.hoad@nhs.net |
| Sri Putti | Directorate Data and Income Manager |  | 020 8510 4490 | sri.putti@nhs.net |
| N/A yet | CCG Commissioning Lead |  |  |  |
| N/A yet | PCN Clinical Director and Manager |  |  |  |
| N/A yet | CCG Claims / Finance Manager |  |  |  |

**Induction and learning log**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Weeks** | **Venue** | **Key learning areas and competencies this week that you will be learning and from whom** | **Key things I have learnt this week** | **Key areas this week I feel I need more support / learning on** | **Signed off by Inductor** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Induction sign off**

|  |  |  |  |
| --- | --- | --- | --- |
| **Key induction area** | **Signed off by inductee** | **Signed off by Line Mgr** | **Date** |
| Has access to an ELFT email address |  |  |  |
| Has been provided with an initial work plan with key areas of focus for the diary |  |  |  |
| Understands how to use the EMIS / S1 system |  |  |  |
| Signed up to the authorised signatory database (for line managers only) |  |  |  |
| Has access to datix |  |  |  |
| Has access to oracle |  |  |  |
| Covid-19 risk assessment has been undertaken |  |  |  |
| Has had training on CEG dashboards |  |  |  |
| Understands the practices registration policy and fee-paying systems |  |  |  |
| Understands and has log ins for Exeter, CQRS and any other system |  |  |  |
| Understands practices complaints and datix systems and timelines |  |  |  |
| Understands the PREM survey and how to obtain the data and the you said we did process |  |  |  |
| Understands the national GP patient survey, what it is for and how to use the information |  |  |  |
| Understands the practices governance on   1. Practice based clinical governance meetings and 2. Practice based performance and finance meetings |  |  |  |
| Understands the approach to supervision and takes a structured approach using the directorate forms |  |  |  |
| Knows how and where to find ESR self service |  |  |  |
| Knows how to code an appraisal in ESR |  |  |  |
| Signed up to the Directorates Leadership Programme |  |  |  |
| ESR hierarchy has been updated to reflect line management responsibilities for individuals under your care |  |  |  |
| Is receiving the directorate communications bulletin |  |  |  |
| Is receiving the directorate CQC bulletin |  |  |  |
| Understands all areas of health and safety including policies on mask wearing and IPU |  |  |  |
| Understands the visitor’s policy to practice and the track and trace system |  |  |  |
| Understands how to report infection control issues to ELFT |  |  |  |
| Knows where to find all practice policies and procedures |  |  |  |
| Knows where to find all Trust and directorate specific policies and procedures |  |  |  |
| Has access to the K drive |  |  |  |
| Understands the directorates process on performance and finances |  |  |  |
| Understands what enhanced services (Directed, national and local) are available to the practice and which ones are signed up to |  |  |  |
| Understands the practices systems and processes |  |  |  |
| Is signed up to |  |  |  |
| Signed up to Oracle with relevant form access |  |  |  |
| Has completed the trust induction |  |  |  |
| Understands the trust systems on the booking of agency / locum staff |  |  |  |
| Understands how to calculate annual leave and the process for booking of annual leave by their teams for safer staffing levels |  |  |  |
| Care hill formula, weighted payments to practices, deprivation ranking and prevalence | P&C |  |  |
| GMS, PMS and APMS contract types and who can hold them | P&C |  |  |
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| National enhanced services | P&C |  |  |
| Enhanced services commissioned by a GP Federation | P&C |  |  |
| Contractual requirement - PPG | P&C |  |  |
| Primary care network DES, ARRS, PCN participation payments, PCN admin payment, PCN clinical director payment | P&C |  |  |

# **Upward feedback to the directorate on the training scheme**

1. What has worked well?
2. What could have worked better?
3. Do you feel equip to lead a practice?
4. If not why not? – what further training and support can be provided?

**Services within the primary care directorate**

1. Leighton Road Surgery in Leighton Buzzard. The practice has a list size of 20,000 and is part of Leighton Buzzard PCN. The practice provides routine medical care to a mixed urban and rural population.
2. Cauldwell Medical Centre in Bedford. The practice has a list size of 9,000 and is part of East Bedford PCN. The practice provides routine medical care to a slightly younger population than normal and has a slightly higher than average caseload of patients with mental health problems.
3. Newham Transitional Practice is based over two sites with a list size of 4,500 and covers the whole of Newham.  The practice is commissioned to provide care to a transitional population of patients, which includes patients who do not have access to an NHS number, those experiencing homelessness and some are from migrant populations as well as other vulnerable groups
4. Health E1 in Tower Hamlets. The practice provides care to a list of 1,000 homeless patients. The practice team have close working links with mental health teams, voluntary organisations etc.
5. The Greenhouse Practice in Hackney. The practice provides care in a very similar way to Health E1 and look after a list of 1,000 patients.

1. The Homeless Outreach Service - This service was set up in April 2020 in response to the Covid-19 pandemic. It was initially commissioned to provide primary care services to people in hotel accommodation who had formerly been rough sleeping. The service has a team of GP’s and primary care nurses and operates across Newham, Tower Hamlets and City and hackney. The team works closely with the nurse led outreach service at Newham Transitional Practice. The service has developed during the Covid-19 pandemic and now aims to offer flexible care to any person who is homeless and needs care in any setting outside of one of our homeless practices.
2. The Pathway Homeless Team @ RLH - The Pathway service is linked to Health E1 and based in Bart’s Hospital Trust. It is a small team that works with clinical staff in the Bart’s Trust to ensure that robust discharge plans are in place for homeless people admitted to hospital thus ensuring that these patients do not stay in the hospital longer than necessary and are not discharge to the street. To contact the Pathway Homeless Team at the Royal London Hospital please call 07730130221 (mon-fri 9-5) or email [elft.pathwayhomelessteam@nhs.net](mailto:elft.pathwayhomelessteam@nhs.net)
3. City and Hackney Pathways – similar service to the one listed above.

**Appendix – Trust Board**

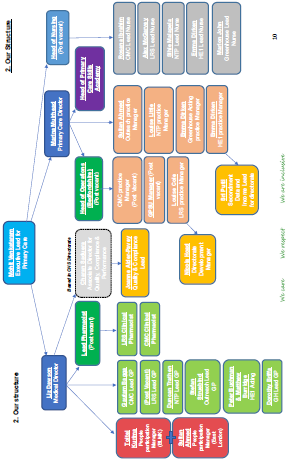
Trust Values (on your lanyards) - “We care, We respect, We are inclusive “

Trust Mission “improving the quality of life for the people we serve”

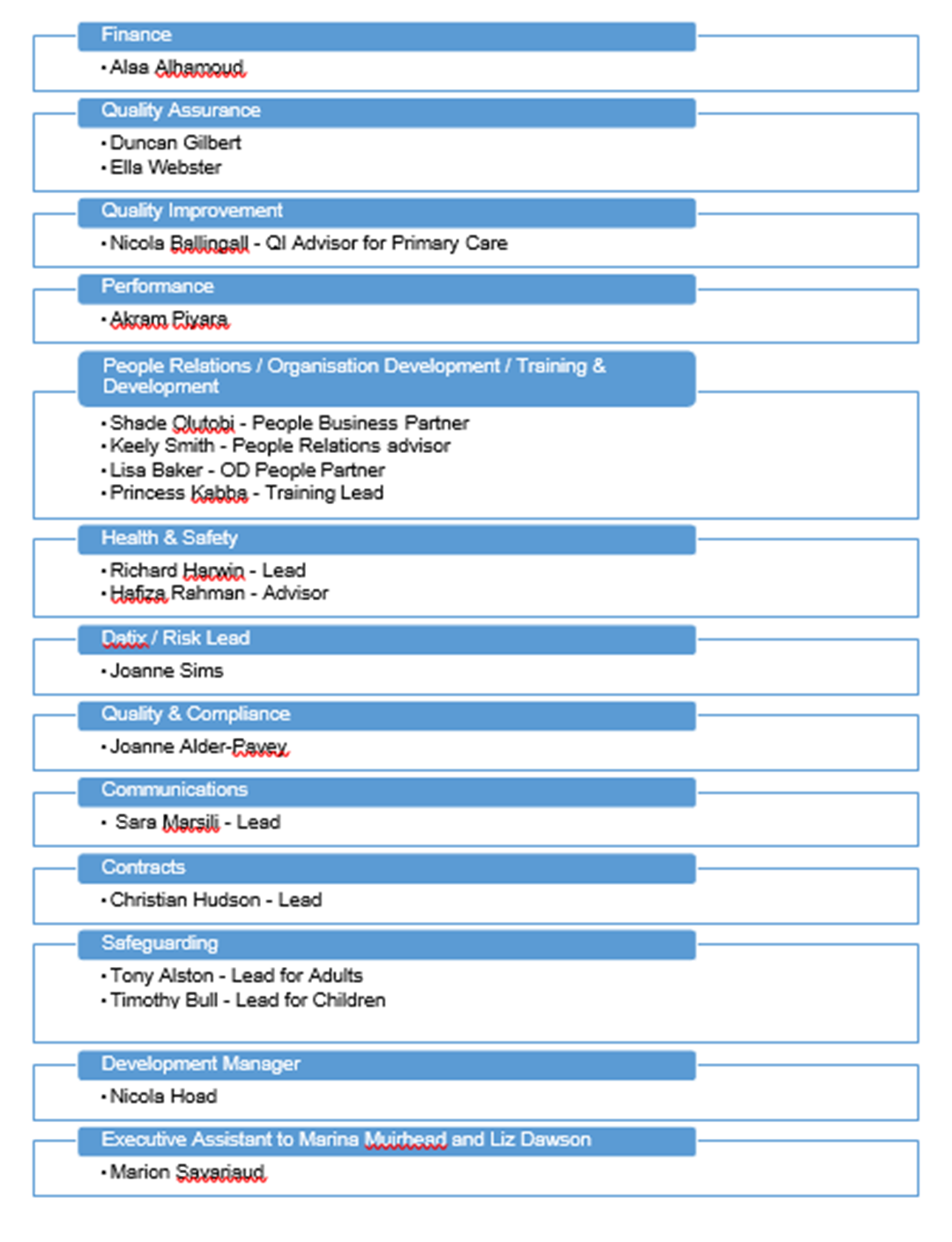
Freedom to speak up (whistle blowing) [elft.freedomtospeakup@nhs.net](mailto:elft.freedomtospeakup@nhs.net)



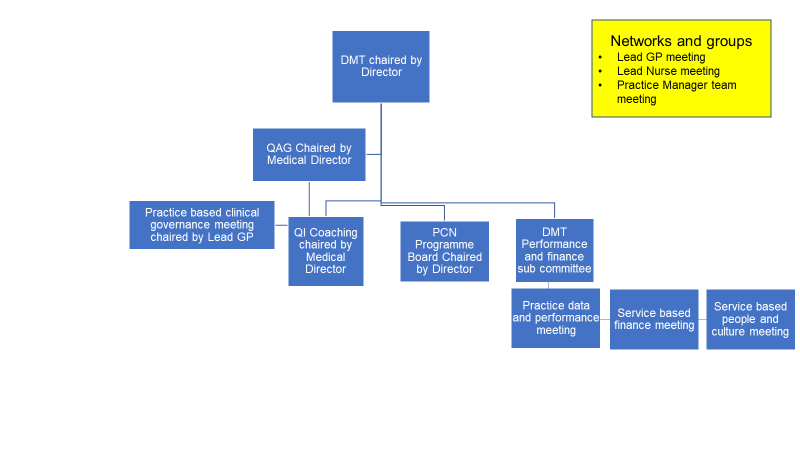
**Appendix Management Structure**

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**Appendix – supporting corporate team**

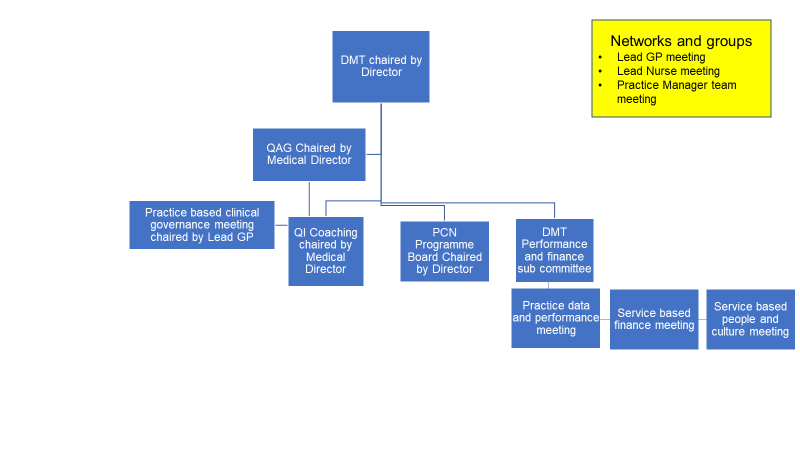
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**Appendix – Primary Care Directorate Governance Structure**

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**Appendix Practice Structures**

**Newham Transitional Practice**

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**Greenhouse Practice**

**HealthE1 Practice**

**Cauldwell Medical Centre**

**Leighton Road Surgery**

**Appendix – quick guide documents**

|  |  |
| --- | --- |
| **Document** | **Link** |
| PC Directorate Handbook | Please find on the extranet |
| Easy guide to general practice | Please find on the extranet |
| PC Directorate People and culture ‘how to guide’ | Please find on the extranet |
| Sign up to the authorised signatory database (for line managers only) | http://finweb:81/asdb/ |
| A range of translated materials (letters / texts in 15 languages can be found here) | K:\Primary Care Directorate Admin\People participation materials\translations.zip |
| Policies and procedures | Please find on the extranet |
| Appraisal forms | <https://sway.office.com/jZPNjPoisxs6byDE?ref=Link> |
| Appraisal training | <https://www.elft.nhs.uk/Working-For-Us/Training-and-Development/Appraisals> |
| Coding an appraisal in ESR | <https://sway.office.com/223Zo3i95qIK2lBQ?ref=Link> |
| ELFT - Declaration of Interests Form | [ELFT - Declaration of Interests Form](file:///C:\Users\muirheadm\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\29CQJVG2\POLICIES\Declaration%20of%20Interests%20Form.docx) |
| ELFT Accessing on-line payslips | [ELFT Accessing on-line payslips](file:///C:\Users\muirheadm\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\29CQJVG2\POLICIES\Accessing%20eLearning%20and%20Payslips%20at%20home%20-%20Final.pdf) |
| ELFT Childcare-Vouchers-Parent-FAQs | [ELFT Childcare-Vouchers-Parent-FAQs](file:///C:\Users\muirheadm\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\29CQJVG2\POLICIES\Childcare-Vouchers-Parent-FAQs.pdf) |
| ELFT NHS Employee Discount | [ELFT NHS Employee Discount](file:///C:\Users\muirheadm\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\29CQJVG2\POLICIES\NHS%20Employee%20Discount%20(September%20Update).pdf) |
| Recruitment Form (Budget Authorisation Form): | <http://finweb:81/esrforms/recruit.php> |
| Staff Change Form: | <http://finweb:81/esrforms/change.php> |
| Staff Leaver Form: | <http://finweb:81/esrforms/leaver.php> |
| Staff Sickness Form | <http://finweb:81/esrforms/sickness.php> |
| To view forms submitted by you: | <http://finweb:81/esrforms/search.php> |
| ELFT Policies and procedures on HR | <https://www.elft.nhs.uk/About-Us/Freedom-of-Information/Trust-Policies-and-Procedures/Human-Resources-Policies> |
| NHSE primary care handbook | <https://www.england.nhs.uk/wp-content/uploads/2017/11/B0134-primary-medical-care-policy-and-guidance-manual-v3.pdf> |

**Appendix – Supervision form for Managers**

**1:1 Record Sheet**

|  |  |  |  |
| --- | --- | --- | --- |
| **Staff Member:** |  | **Role** | **Practice Manager** |
| **Line Manager:** |  | **Date:** | **2022** |

|  |  |
| --- | --- |
| **Core role responsibilities and progress against them** | **X month progress / update** |
| Wellbeing conversation |  |
| What is on your list to discuss? |  |
| Care navigation |  |
| Skills academy and KSF |  |
| Service Performance and reporting including rotas |  |
| QOF |  |
| Ad hoc funding |  |
| Service Finance including bank and agency |  |
| PCN relationships, IIF, ARRS and developments |  |
| People and culture |  |
| People participation |  |
| QI projects |  |
| CQC preparation and peer review |  |
| Sickness; |  |
| Covid-19 risk assessment |  |
| Annual leave, planned, booked, remaining, handover plans |  |
| Training needs/CPD & mandatory training; |  |
| Appraisal Roles-objectives; review / discussion; |  |
| Embedding   * Trust processes and procedures * Extranet * handbook |  |
| What help do you need from me / others? |  |
| Do you need to escalate anything to me? Information or any action? |  |

|  |  |
| --- | --- |
| **Signed:** | |
| **Staff Member:** | **Date** |
| **Line Manager:** | **Date** |

**DMT Performance and Finance Subgroup**

* Every month there will be a DMT performance subgroup which is chaired by the Head of Operations.
* The terms of reference for the group can be found here: <https://elft.nhs.uk/primarycare/resources/472/Terms-of-Reference-TOR---DMT-Subgroup-Performance->
* Practice Managers along with other lead figures at the surgery will be held account for the practices performance at this meeting.