Practice Manager FY2 Checklist

Acknowledgement: This document has been adapted from an original paper written by Dr Joanna Robinson for her own Practice.

2 months prior to commencement:

1. E-mail or telephone FY2 with welcome and introduction and offer of a visit to the practice to meet new colleagues ahead of their placement. Most will want to do this.

2. Confirm contact details to include:
   - Email (home and work)
   - Address
   - Tel numbers (home and mobile)
   - Any special needs, requirements or information (religious beliefs and practices, travel arrangements to and from work, commitments outside of work, what they like to be called etc). This sort of information is invaluable in our experience, and helps us to plan for their placement appropriately.
   - Provide them with contact details of their trainer if they do not already have this, including email and tel numbers.

3. Check with the FY2 the date of their latest enhanced CRB check, indemnity insurance arrangements and GMC certificate. Ask the FY2 to provide the documents (where relevant) for inspection on their first day at the Practice. (Take copies for their file on their first day, if appropriate)

1 month prior to commencement:

4. Prepare honorary contract for the FY2 using the standard template – see pages 20-23.

5. Prepare induction timetable for the first two weeks, we include sitting in with GPs and other clinicians in the first week of their placement and virtually all GP sessions in the second week. Check with the FY2 if there are any areas of particular interest or training needs and accommodate if this is possible and appropriate.

6. Once a standard timetable for the FY2 has been agreed (to include their half days, taking account of any On-call commitments and compulsory training) get the appointments for the FY2 set up on the clinical or appointment system at 30 minute intervals to start with.

7. Send electronic or paper copies of timetables, staff handbook (if you have one), prescribing formulary, copy of the honorary contract and FY2 Frequently asked questions to the FY2, reassure FY2 Doctor that all will be well, nothing to worry about and looking forward to having them working at the practice. Remind them about a visit to the practice if they have not already done so.

8. Prepare induction pack for the FY2 to include:
   - Timetables
   - Tel directories for internal and external contacts
   - How to guides (clinical system processes, appointment system, using electronic protocols etc)
• Fire evacuation plan
• Floor plan of the building showing hazards, fire exits and extinguishers
• Copy of the honorary contract
• Prescribing formulary
• FAQs for FY2s
• We always give a welcome to the practice card to each new starter at the practice on their first day.

2 weeks prior to commencement:

9. Prepare and stock the FY2s room, including stationary, clinical consumables, paper, leaflets etc. Arrange nameplate for the door of their room. Update website with doctors details and duration of their placement. Prepare a sign for patients alerting them that the FY2 will be sitting in with doctors and other clinical staff for the induction period.

10. Ensure all staff are aware of the imminent arrival of the new FY2 doctor, in our practice they always forget so we keep reminding them!

11. Prepare access to all IT systems via passwords and logons including, clinical system, appointments, ICE requesting, radiology, scanning system, smart card set up (and remind them to bring it with them), hospital PAS, email, windows etc. We find it’s a good idea to check it all works as well by logging on as the FY2 and checking each system is usable (this can waste literally days trying to get it sorted out if you don’t).

12. Make contact with the FY2, 2-3 days before their placement just to touch base, reassure, reassure, reassure that all will be well and we are all looking forward to their arrival and working with them. Reaffirm to contact you with any troubles or difficulties or worries so that we can rectify with them.

On the day:

13. The morning should be blocked out for the trainer and the practice manager. We advise FY2s to arrive between 9 and 9.30 just to miss the crazy 8.30 rush.

14. Warm welcome, (it helps if the receptionists at least look like they are expected), PM gives tour of the premises, covering health and safety hazards, fire exits, extinguishers, panic alarm locations and procedure for responding to these.

15. Introduction to all staff as part of the above

16. GP Trainer or practice manager to go through the induction pack paperwork with the FY2

17. Show FY2 to their room and the location of all the essentials, ensure they know where they will be next i.e. going out on visits with a GP, and take them along and introduce them to the person they are working with that day.

18. Show them the staff room and cover places of local interest, good places to eat or find lunch etc

19. During the two week induction period, ensure adequate IT training on all clinical and appointment systems, we usually start with 2 x 2hr sessions, with how to guides for each item we cover, and then arranged follow ups as and when required. We also have staff available to
problem solve IT and clinical system issues as and when required.

20. Check documentation and photocopy, and store in their personnel file.

**Process for submitting claims for F2 Supervision payments**

The current invoice template that must be used for submitting claims can be obtained by emailing the Foundation School Manager (currently Lisa McChrystal).

The GP F2 Supervision payment amount for 4 month placements can be confirmed by the Wessex Foundation School Team:

**Payment queries should be sent to:**
lisa.mcchrystal@wessex.hee.nhs.uk or natasha.patel@wessex.hee.nhs.uk

**Completion of the Invoice**

- Invoices must be submitted during the last month that you have the trainee in post with you
- The deadline for invoice submission is 2 months after completion of the F2 trainee supervision period. Retrospective payments can no longer be considered.
- The invoice must have a reference number
- Please submit the invoice on practice headed notepaper
- Include the name of the F2 Supervisor
- Include the name of the F2 doctor
- Please state the placement date from / date to
- Include payee and bank account details

**Please send the invoice directly to this address in Wakefield:**

XXLMCCHRYSRTAL  
Health Education England  
Wessex LETB  
T73 Payables F485  
Phoenix House, Topcliffe Lane  
Wakefield,  
WF3 1WE