

Policy manual checklist

Your policies and procedures manual should, as a minimum, cover the following:

- organisational chart
- appointment systems – types and when to make them, how to manage 'did not attend' (DNA) patients, cancellations
- complaints and adverse outcome management
- medical records
- written materials/other resources that are provided to patients and how these are recorded
- archival system for patient education/information materials
- hospital liaison/discharge arrangements. Instructions for booking in-hospital procedures including consent – if applicable
- post-operative/procedure care and management
- instructions for procedures carried out in the rooms (and any resultant biopsies/samples etc.)
- confidentiality and security of patient personal health information
- receiving and returning phone calls, taking and recording messages
- recognising and dealing with emergencies in the surgery or on the phone
- tracking pathology and other tests, recalling patients and management of test results, including abnormal pathology and other abnormal tests
- meetings (including purpose, agenda templates and minute templates)
- referrals and recall management
- workplace health and safety
- infection control and practice cleaning
- employment matters such as recruitment, probation, induction, performance management, job descriptions, uniforms, training, illness and holidays
- education for staff
- fee policy
- billing arrangements – Medicare, hospitals, private health insurers
- opening and closing instructions
- correspondence and mailing procedures
- key contacts and when/why to contact them
- IT issues including compliance, PCEHR, security (passwords, access levels, remote access, i-Keys, screen savers, firewalls, email, internet/social media access etc.), backup, emergency plans (such as during power failure or flooding)
- disaster plan and disaster recovery plan