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# Example induction checklist template for multidisciplinary team staff in general practice

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## Introduction

NHS England and frontline general practice professionals have designed this example induction checklist template to support staff new to general practice, and with the primary care network (PCN) multidisciplinary team (MDT) in mind. It may also be useful to individuals who have been working in primary care for some time but would benefit from an orientation, and other staff new to a primary care setting but not part of the MDT.

### **Aim**

An effective induction process makes staff feel welcome and helps them settle into their role more quickly.

This example induction checklist template provides a consistent and comprehensive set of steps to give staff in primary care settings an effective induction, supporting them to integrate and gain confidence in their new roles. Primary care organisations may wish to consider using this template as part of their standard induction processes, tailoring the checklist items to suit local needs.

This is intended as optional guidance. Practices, PCNs and other employers are responsible for ensuring their staff undergo an appropriate induction to the organisation and their role.

### **Objectives**

- To help staff new to primary care understand the primary care setting.
- To enable their safe and effective working within a new environment.
- To provide a standardised approach to induction, which organisations can tailor to meet local needs.

# Induction checklist template

| Practice site information  | Date(s) completed | Requirements |
|--|-------------------|--------------|
| Location(s) staff member will be working in  |                   | Essential    |
| Addresses and phone numbers of practices within the PCN  |                   | Essential    |
| Access arrangements to buildings including evacuation plans  |                   | Essential    |
| Parking arrangements and mileage allowance   |                   | Essential    |
| Opening hours and extended access arrangements   |                   | Essential    |
| Location of toilets, changing, refreshment and rest areas  |                   | Essential    |
| Teams in practices and PCNs  | Date(s) completed | Notes        |
| Contact details for key staff working across the PCN   |                   | Essential    |
| Contact details for line manager   |                   | Essential    |
| Contact details for GP/clinical supervisor   |                   | Essential    |
| Staff introductions  | Date(s) completed | Notes        |
| Introduction to clinical directors, practice and PCN teams   |                   | Essential    |
| Explanation of organisational structure and committee structures, systems and processes (GP/ PCN / cluster / federation/trust structure) |                   | Essential    |
| Introduction to peer support networks, groups or forums within PCN   |                   | Essential    |
| IT and communication systems   | Date(s) completed | Notes        |
| Provided with IT equipment (eg laptop) where required and access (eg system login, NHS Smartcard) to perform role                        |                   | Essential    |
| Induction to clinical system(s) used by the PCN practices including any training required  |                   | Essential    |
| IT help desk contact details   |                   | Essential    |
| Induction to telephony systems   |                   | Essential    |

| Orientation in primary care  | Date(s) completed | Notes                               |
|--|-------------------|-------------------------------------|
| Introduction to <a href="#">general practice</a>   |                   | Essential                           |
| Introduction to <a href="#">primary care</a> and <a href="#">primary care networks</a>   |                   | Essential                           |
| Read relevant <a href="#">ARRS roles information</a> on the NHS England website  |                   | Essential                           |
| Familiarisation with relevant sections of the <a href="#">Network Contract DES</a> and <a href="#">role-specific guidance</a>            |                   | Desirable                           |
| <a href="#">The primary care network handbook</a>  |                   | Desirable                           |
| Training   | Date(s) completed | Notes                               |
| Introduction to allocated clinical supervisor and discussion around supervision allocation time  |                   | Essential                           |
| Explanation of mandatory training required (eg information governance, equality and diversity, safeguarding) and time needed to complete |                   | Essential                           |
| Added to local mailing list for education and training   |                   | Essential                           |
| Provided with <a href="#">Training Hub website</a> and contact details   |                   | Essential                           |
| Shadowing practice roles, eg GP, additional roles staff, reception, PCN and practice managers  |                   | Optional                            |
| <a href="#">Register here</a> for elearning for healthcare   |                   | Optional                            |
| Policies and procedures  | Date completed    | Notes                               |
| Shown procedure for booking with GP for emergency and routine follow-ups   |                   | Essential                           |
| Shown procedure for booking with other general practice healthcare professionals   |                   | Essential                           |
| Familiarisation with and access to existing letter templates or methods for:   |                   |                                     |
| <ul style="list-style-type: none"> <li>Secondary care referrals (and awareness of local clinical pathways)</li> </ul>                    |                   | Essential if applicable to the role |
| <ul style="list-style-type: none"> <li>Urgent and emergency referrals</li> </ul>   |                   | Essential if applicable to the role |
| <ul style="list-style-type: none"> <li>MSK physiotherapy (both outpatient and community)</li> </ul>                                      |                   | Essential if applicable to the role |

|   |                       |                                     |
|---|-----------------------|-------------------------------------|
| <ul style="list-style-type: none"> <li>Other reablement services (eg falls services / occupational therapy / podiatry)</li> </ul>   |                       | Essential if applicable to the role |
| <ul style="list-style-type: none"> <li>Talking therapies / mental health services</li> </ul>  |                       | Essential if applicable to the role |
| <ul style="list-style-type: none"> <li>Smoking cessation / dietitian / exercise referral</li> </ul>   |                       | Essential if applicable to the role |
| <ul style="list-style-type: none"> <li>Local services for social prescribing (including key NHS, social and voluntary organisations in the area and how to signpost)</li> </ul>     |                       | Essential if applicable to the role |
| <ul style="list-style-type: none"> <li>Clinical / medical emergency plan: adverse drug reactions, anaphylaxis, red flags, cardiac arrest, first aid and medical kit, etc</li> </ul> |                       | Essential if applicable to the role |
| <ul style="list-style-type: none"> <li>Prescribing policy and procedure</li> </ul>  |                       | Essential if applicable to the role |
| Lone worker policy  |                       | Essential                           |
| Home visits policy  |                       | Essential                           |
| Complaints policy and information about Freedom To Speak Up guardian  |                       | Essential                           |
| Triaging policy and procedure   |                       | Essential                           |
| Access to chaperones  |                       | Essential                           |
| How to report incidents or adverse events   |                       | Essential                           |
| Sickness and absence policy and procedure   |                       | Essential                           |
| <b>Safeguarding</b>   | <b>Date completed</b> | <b>Notes</b>                        |
| Practice(s) safeguarding policy and procedure   |                       | Essential                           |
| Safeguarding training   |                       | Essential                           |
| Practice(s) lead for safeguarding adults, children and young people   |                       | Essential                           |
| Key safeguarding contacts: ICS, social services (including out of hours duty team), police  |                       | Essential                           |
| <b>Line management</b>  | <b>Date completed</b> | <b>Notes</b>                        |
| Familiarisation with job description and/or service specification   |                       | Essential                           |
| Create a job plan   |                       | Essential                           |

|  |                       |              |
|--|-----------------------|--------------|
| Arrangements for appraisal and 1-to-1 line management meeting  |                       | Essential    |
| PCN working arrangements, eg split of time in each member practice, managing annual leave across sites |                       | Essential    |
| <b>Supplementary reading and reference materials</b>   | <b>Date completed</b> | <b>Notes</b> |
| Subscribe to mailing lists relevant to job role  |                       | Optional     |
| Sign up for the <a href="#">FutureNHS collaboration platform</a>                                       |                       | Optional     |