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| Cheshire Training Hub |
| General Practice Administrative Staff Competency Booklet |
| Sub-category of Governance Framework for Training and Education in Primary Care |
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| This guide contains a competency checklist to work through to ensure all administrative staff working within Cheshire GP surgeries are proficient with data input, GDPR, customer service, and assisting with patient handling such as referrals, prescriptions and appointments. |

**Introduction**

**Developing the Role / Career progression**

**Competency booklet**

**Introduction**

From 2018, through the development of a [Primary Care Academy](http://www.cheshireandmerseysideprimarycareacademy.co.uk/index.php) (PCA), the 5 Training Hubs in Cheshire and Merseyside have been working collaboratively. The [Training Hubs](http://www.cheshireandmerseysideprimarycareacademy.co.uk/index.php/contact-us)  are a resource of further information and guidance for each of the primary care networks, in order to engage and develop their workforce to ensure future success and sustainability. The purpose of this training support pack is to guide and direct practice managers and employees working within GP surgeries, and assist in the successful development of the growing number of roles within primary care. Working alongside the clinical and administration staff, receptionists within GP surgeries are often the first person that patients talk to face-to-face or on the phone. The patient’s journey relies up on the knowledge and efficiency of the administration staff as much as it does the clinical staff. The opportunity to work towards higher qualifications within the administration roles enables the development of a more sustainable workforce and the provision of a high quality service.

**Developing the Role / Career progression**

The scope for development within an administrative role in primary care is extensive. Opportunities to enhance the role and provide career development include basic read coding skills, medical terminology training, first aid training, and champion roles. Champion roles such as Carer Champion, Mental Health or Patient Engagement Champion act as a local link point providing support for colleagues, raising awareness and signposting staff or service users for further professional support. Progressing into a clinical role is also an achievable step within the primary care environment, with several administrative staff choosing to develop their skills in health care as a Health Care Assistant, General Practise Assistant or Nursing Associate. Training and education support packs for each of these roles are available on the PCA website.

**General Practice Administrative Staff Competency Booklet**

**Competency Areas**

1. Inputting data
2. EMIS Web
3. Docman
4. Distributing information / Handling mail
5. Filing systems
6. Stock control
7. Telephone calls and messages
8. Greeting patients
9. Appointments
10. Home visits
11. Emergency situations
12. Ambulance and transport
13. Prescriptions
14. Registration
15. Governance and training
16. Requests for information / GDPR and completion of paperwork

1. Inputting Data – A crucial part of your daily work will be inputting, editing and locating information for patients.

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| **Area of competency** | Working towards | Competent |
| Locate and retrieve patient details by name, DOB, address or NHS number. |  |  |
| Edit patient registration details (Confirm correct telephone numbers and Email address **only**). |  |  |
| Understand and access different elements of patient records such as consultation screen, medication screen, investigations, diary etc. |  |  |

2. EMIS Web

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| **EMIS Web** | | **Working towards** | **Competent** |
| **Care Record** | VIEW deducted and archived patient care records |  |  |
|  | SCAN and ATTACH documents and be able to create and attach document template |  |  |
|  | ADD, EDIT, LINK and MANAGE problems |  |  |
|  | View a record and file it (as a record or attachment) or reject it. |  |  |
|  | VIEW and PRINT all un-sealed data contained in a patient’s care record. |  |  |
|  | View summary of a patient's care record. |  |  |
|  | View patient’s Medication history. |  |  |
|  | VIEW and PRINT any attachments within a patient's care record. |  |  |
|  | VIEW and PRINT test requests from both Care Record and Workflow Manager. |  |  |
|  | Access the Appointment Book |  |  |
|  | Access the appointment and set a quick list of appointment book views |  |  |
|  | Use the patient find functionality as well as be able to VIEW a patient's registration information. |  |  |
|  | Read code a diagnosis/symptom/check for existing diagnosis |  |  |
| **Medication** | ISSUE already authorised medications |  |  |
| View patient’s Medication history. |  |  |
| CANCEL a course or issue of a medication. |  |  |
| Manage the flow of Document Templates (i.e. Referral or Appointment Templates) through Workflow Manager. |  |  |

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| **EMIS Web** | | **Working towards** | **Competent** |
| **Registration** | VIEW a patient's registration information |  |  |
| REGISTER patients and carers on EMIS Web and check against PDS |  |  |
| Decease a patient |  |  |
| MANAGE the patients consent status to shared medical records. |  |  |
| Search for patients that are registered with other organisations (via sharing agreements). |  |  |
| Register a patient for Patient online |  |  |
| Register a patient or non patient online for proxy access |  |  |
| EDIT a patient’s registration screen, including registration status |  |  |
| **Patient Administration/ Appointments** | View a shared record |  |  |
| EDIT appointment sessions that are planned into the Appointment Book. |  |  |
| BOOK and CANCEL appointments. |  |  |
| EDIT appointment information. ARRIVE, SEND IN and LEAVE a patient within the appointment book. |  |  |
| Apply appointment filters and to change views (i.e. week view or day view). |  |  |
| Override embargoes that have been applied to the appointment book. |  |  |
| CREATE, EDIT and DELETE session templates, week templates and to use the Planner to create the appointment book. |  |  |
| Send a cross org task to a specific team |  |  |
| Action a cross organisational task |  |  |
| Opt out a patient from sharing |  |  |
| Book a cross organisational appointment i.e. to Hub |  |  |
| Create a patient alert |  |  |
| Configure appointments for Patient Access |  |  |
| **EMIS Web** | | **Working towards** | **Competent** |
| **Reporting** | CREATE and EDIT searches/reports. |  |  |
| Ability to RUN existing searches/reports. |  |  |
| Search for outstanding test results |  |  |
| VIEW and PRINT test requests from both Care Record and Workflow Manager. |  |  |
| **Choose and Book/Managed referrals** | ‘Authorise and Send’ referrals. For those who initiate patient referrals and send without requiring authorisation from another user. |  |  |
| Create an EMIS to EMIS referral via managed referral |  |  |
| **Workflow** | CREATE tasks and SEND them to other users/teams for action via Workflow Manager. |  |  |
| EDIT existing tasks to add more information. Users can change the owner of a task |  |  |
| ACTION tasks received via Workflow Manager |  |  |
| Accept and file a GP2GP transfer , include managing degrades |  |  |
| **Configuration** | Access Business Continuity mode |  |  |

3. DOCMAN

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| **Docman** | | | **Working towards** | **Competent** |
| **Filing** | **Scan Documents** | Single page, Multiple pages |  |  |
| Capturing documents |  |  |
| Rejecting EDT's |  |  |
| **Filing Documents** | Changing field titles, Changing folders, adding/changing codes, choosing review options |  |  |
| **Tasks** | **Viewing Tasks** | View Controls |  |  |
| Views - Quick filters, view recent task, view other inboxes |  |  |
| Task actions - task history/view timeline, view in EMIS Web, annotate, quick steps, tasks, comments, other actions, email print |  |  |
| **Coding** | **Adding Codes** | Adding new codes |  |  |
| Add from pre-defined list |  |  |
| Adding free text |  |  |
| Copying text into another document |  |  |
| Viewing medical history |  |  |
| **Viewing documents** | **Viewing in EMIS Web** | Viewing document history |  |  |
| Changing filing details |  |  |
| Changing folders |  |  |
| Email/print/download |  |  |
| Move/duplicate documents |  |  |
| Create/review documents |  |  |
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4. Distributing information / Handling mail – you will be expected to collect, copy and distribute information within the Practice.

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| **Area of competency** | Working towards | Competent |
| Handling prescription requests delivered by hand, email or fax. |  |  |
| Discharge letters delivered by hand. |  |  |
| Ability to scan documents via Docman **(advanced).** |  |  |
| Ability to copy documents. |  |  |
| Ability to send faxes. |  |  |
| Distribute general post. |  |  |
| Distribute Doctors letters / referral letters. |  |  |
| Collecting and distributing forms received through email, post, fax or from patients. |  |  |
| Know how to view / access patient’s documents via Docman. |  |  |
| Ability to send / access emails via NHS email (generic & personal) |  |  |

5. Filing systems – During your day you will be expected to use specific filing systems to store prescriptions / information.

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| **Area of competency** | Working towards | Competent |
| Be able to file and retrieve repeat prescriptions (non-chemist) by alphabetical order. |  |  |
| Be able to file and retrieve repeat prescriptions (chemist) via chemist name and colour in folder. |  |  |
| Be able to file and retrieve controlled prescriptions both chemist and non-chemist with controlled folder. |  |  |
| Understand the protocol for controlled prescriptions (have to be signed for. Keep and file white slips. |  |  |
| To be able to retrieve and re-file patient’s paper records by **gender** and **strict** alphabetical order. (Records held at GB). |  |  |
| To file and retrieve blood forms. |  |  |
| To file and retrieve forms / letters for patients to collect from the collection folder. |  |  |

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| **Area of competency** | Working towards | Competent |
| Know the procedure for when stationary supplies are low such as printing paper, prescription paper, Registration forms, cartridges / toners etc.… |  |  |
| Be able to check and re-stock printers with white printing paper and green prescription paper. |  |  |
| Be able to check and re-stock photocopier with printing paper. |  |  |
| Know how to order clinic stock such as ICE paper, pathology specimen bags, sample bottles etc.… |  |  |

6. Stock control – You will be expected to be aware of stock control for some clinical and non-clinical items.

Telephone calls and messages – During your day you will be expected to make and

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| **Area of competency** | Working towards | Competent |
| Introduce yourself clearly and politely when making or receiving telephone calls. |  |  |
| Receive and make telephone calls as required. |  |  |
| Ensure no confidential information is included within any messages left for patients on their answerphone. |  |  |
| Ensure confidentiality is maintained when receiving or making calls where possible, for example using the Surname instead of full / first name especially when working in an open environment (front desk). |  |  |
| Able to take messages from callers and record them / pass them on in an appropriate manner. |  |  |
| Be able to use functions of the phone such as hold, park and transfer. These may be used in order to pause conversations as required or to transfer to another member of staff. |  |  |
| Be able to divert phones when needed such as during half day closures **(advanced).** |  |  |

7. Telephone Calls: receive phone calls in a professional manner.

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| **Area of competency** | Working towards | Competent |
| Be approachable to patients and / or carers; look up and smile. |  |  |
| Demonstrate politeness and professionalism, show empathy and understanding. |  |  |
| Be able to recognise if a patient seems distressed and upset and may need to go somewhere quiet / private to discuss their issues. |  |  |
| Ensure confidentiality and dignity is maintained as best you can when dealing with patients at the front desk. |  |  |
| Know how to offer an interpreter / chaperone for patient appointments. |  |  |
| Be able to respond to routine and urgent request from patients. |  |  |
| Know who to ask for assistance for either yourself or patients when dealing with queries. |  |  |
| Be able to recognise any safeguarding issues and how / who these are to be reported to and recorded. |  |  |

8. Greeting patients – Your daily work will involve you greeting and communicating with patients and carers.

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| 9. Appointments – One of your main duties will be to arrange a variety of appointments for patients using the appointment software EMIS. | | |
| **Area of competency** | Working towards | Competent |
| Make routine appointments for all services within the surgery e.g. Doctors, Practice Nurses, Dietician, Phlebotomist etc. |  |  |
| Be competent to ensure which service / appointment is appropriate for the patient. |  |  |
| Be able to use signposting to provide the best service to the patient, complete the signposting template within Emis. |  |  |
| Check patients in for appointments on arrival. |  |  |
| Cancel appointments when requested by patients. |  |  |
| Cancel appointments if requested by a clinician / due to clinician sickness. For this you may use either phone, letter for txt message **(advanced)**. |  |  |
| Be able to make appointments for outside services where appropriate e.g. urgent blood tests. |  |  |

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| **Area of competency** | Working towards | Competent |
| Be able to arrange appropriate home visits by booking them in on the home visit screen on Emis. These may have been requested by a clinician, the patient or another person such as relative / carer. |  |  |
| Be aware of things which may need more urgent attention / are not suitable for a home visit and report to on call GP. |  |  |
| Know how to transfer appropriate home visits to the rapid response service. |  |  |
| Be able to check home visits have been done and recorded by GPs. If have not been done / recorded know process to follow e.g. remind GP to type up via task and copy in management also. |  |  |
| Prepare patient summaries ready for the home visits. |  |  |
| Know the cut of time for requesting home visits and appropriate procedure if a visit is requested after this time (will go through the on call GP). |  |  |

10. Home visits – One of your roles will involve organising home visits for patients who are housebound / elderly.

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11. Emergency situations – Within your job role it is likely that an emergency situation may happen you will need to know the process to follow if such should occur.

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| **Area of competency** | Working towards | Competent |
| If a patient / member of staff are taken ill or are complaining of urgent symptoms such as difficulty in breathing / chest pains within a public area and are not with a clinician know how to raise the alarm. (Double click panic button on Emis, shout or ring for help and assistance). |  |  |
| Know how to look out for / recognise any safeguarding issues and how these are reported and recorded. |  |  |
| Know the procedure of how the building is evacuated in an emergency situation / fire and the role you would play. |  |  |
| Be aware of the communication cascade and which circumstances this may be used. |  |  |
| Understand what to do if you feel threatened / in danger. Be able to call a member of staff for assistance. Raise the alarm via the panic button, shouting or ringing for help. |  |  |
| Know what to do if a patient calls with urgent symptoms e.g. chest pain, difficulty in breathing. Inform them that you advise to ring emergency ambulance / attend A&E as a matter of urgency, know how to record this within the clinical system (Emis). |  |  |

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12. Ambulance and transport – You may be required to request an ambulance / transport for patients usually at the request of a clinician.

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| **Area of competency** | Working towards | Competent |
| Know how to request an **emergency ambulance** if required usually using the ambulance control direct number **(0345 140 0144)**. Be prepared for questions which they may ask e.g. general details, medical questions, location to collect from and location going to e.g. Leighton Hospital A&E. Use necessary procedure to record when arranged and reference number e.g. Emis / ambulance book. |  |  |
| Be able to request a non-urgent ambulance e.g. for response within a specific time frame e.g. within 2 hours. Numbers are found in reception ambulance book. Use necessary procedure to record when arranged and reference number e.g. Emis / ambulance book. |  |  |
| Know the process which patients can use to organise transport for outpatient hospital appointments, must be booked in advance. Inform patients what information they would need e.g. NHS number, location, appointment time etc. |  |  |

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13. Prescriptions – You will be dealing with prescription requests from patients and pharmacies on a daily basis and will need to know the process for dealing with these.

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| **Area of competency** | Working towards | Competent |
| Understand and be able to explain the surgeries process for patients / pharmacies requesting repeat prescriptions e.g. time frame etc. We take requests via different methods e.g. repeat slips, online access, email (medical professionals only) and fax (pharmacies only). |  |  |
| Understand the process for medications being requested by outside services e.g. on a discharge letter, via clinic letter etc. |  |  |
| Know the procedure if a patient is requesting an item which is on their acute list (recently had) or past medications list. Know which items we are allowed to give e.g. test strips for certain diabetic patients, GTN sprays etc. **(Advanced).** |  |  |
| Be able to pass medication queries / book patients to speak with clinical pharmacist if needed. |  |  |
| Know when / how to use query slips for prescription items (usually only used at Gresty Brook or if clinical pharmacist is not in). |  |  |
| Understand the procedure when dealing with **controlled drugs CD** for example requests, issuing and collecting. |  |  |
| Know where prescriptions normal and controlled are kept / filed for patients and pharmacy patients. |  |  |
| Understand how pharmacy nominations work for prescriptions. |  |  |
| Be able to issue prescriptions **(Advanced).** |  |  |

14. Patient registration – You will be accepting registration forms during your daily work and will need to understand the registration process.

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| **Area of competency** | Working towards | Competent |
| Understand the process for patients wanting to register permanently with the surgery time frame etc. Know which information needs to be completed. Once registered if patients are on regular medication will need to advise to make an appointment. |  |  |
| Understand when temporary resident forms are used and what information must be provided. |  |  |
| Know how patients can sign up with the patient access (online registration) and what information / ID is required. |  |  |

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15. Governance and training – As part of your job role you need to ensure that you are aware of practice policies and protocols in place and training which you should be completing.

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| **Area of competency** | Working towards | Competent |
| Having an awareness of the practice policies and protocols that are in place and where you can locate these, particularly for:  Complaints  Incidents  Health and Safety  Information Governance  Safeguarding  Whistleblowing |  |  |
| Ensure you are completing / up to date with any mandatory training, you will be advised when this is due or being delivered. This may be through online training or face to face sessions. |  |  |

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1. Requests for information / GDPR and completion of paperwork – During your day you may come across requests for information, requests for copies of clinic letters etc. or requests to complete forms, you will need to know the process for this.

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| **Area of competency** | Working towards | Competent |
| Have an awareness / understanding of the up to date GDPR regulations and how this relates to our work within the surgery. |  |  |
| Understand the process which we follow if a patient requests copies of their medical records, Subject Access Request (SARS) and what ID must be provided upon collection. |  |  |
| Understand the process which is followed for requests for information and medical reports from outside services such as solicitors, job centre etc. |  |  |
| Know the practice process and fees for completion of paperwork, medical reports and letters requested by patients. Patients should be given a leaflet outlining the practice fees for when a form / request for a Doctors letter is accepted. |  |  |