

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
- 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.

page 1 of 1