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**Practice Management Tasks for Primary Care, GP Practice**

This document is intended to help identify the numerous tasks that need to be undertaken by the practice management team throughout the year. It is not claimed that it is a complete list, nor will some of the tasks apply to all GP Practices as some will depend on the ICBs local commissioned scheme. Other practices will have different IT systems than shown in this document.

It is a starter list that can be tailored for individual needs and enable tasks to be allocated amongst the team.

It is a useful reference for Practice / Business Managers new to General Practice or as an aide memoire when joining a ‘new’ practice!

If there are items that need to be added, deleted or updated, please let us know at [enquiries@llrlmc.co.uk](mailto:enquiries@llrlmc.co.uk)

| **National Logins** | | | | |
| --- | --- | --- | --- | --- |
|  | | | | |
| **Site** | **Web Address** | **N3** | **What is it** | **Who / When** |
|  | | | | |
| **Calculating Quality Reporting Service (CQRS)** | <https://nww.cqrs.nhs.uk>  <https://login.cqrs.nhs.uk/cas/login>  <https://digital.nhs.uk/services/calculating-quality-reporting-service>  [support@cqrs.co.uk](mailto:support@cqrs.co.uk) | No | The Calculating Quality Reporting Service (CQRS) is an approval, reporting and payment calculation system for GP practices. It helps practices to track, monitor and declare achievement for the Quality and Outcomes Framework (QOF), Direct Enhanced Services (DES) and Vaccination and Immunisation (V&I) programmes. |  |
| **Open Exeter** | <https://digital.nhs.uk/services/nhais/open-exeter>  [exeter.helpdesk@nhs.net](mailto:exeter.helpdesk@nhs.net) | Yes | Open Exeter gives access to patient data held on the National Health Application and Infrastructure Services (NHAIS) systems, including cervical screening, organ donor, blood donor.  (However, the NHAIS platform is being replaced by a range of new digital services. NHAIS uses legacy technology and does not match the future business needs of the NHS.)  For users in GP practices, Open Exeter provides access to GP financial information, with a download facility to populate GP practice accounting systems.  The Open Exeter secure log on facility is also used to access other SSD services/applications, such as the Bowel Cancer Screening System and BS Select. |  |
| **DSP Toolkit** | <https://www.dsptoolkit.nhs.uk/> | No | The Data Security and Protection Toolkit is an online self-assessment tool that allows organisations to measure their performance against the National Data Guardian’s 10 data security standards.  All organisations that have access to NHS patient data and systems must use this toolkit to provide assurance that they are practising good data security and that personal information is handled correctly.  Also see [NHS Digital Information Governance](https://digital.nhs.uk/data-and-information/looking-after-information/data-security-and-information-governance) |  |
| **NHS Pensions Online** | <https://www.nhsbsa.nhs.uk/employer-hub/pensions-online> | Yes | Pensions Online (POL) is an online tool based on the internal NHS Network (N3).  It gives employers the facility to update and amend members' pension records. |  |
| **NEST** | <https://www.nestpensions.org.uk/schemeweb/nest.html> |  | Pension provider for those staff who are unable to access the default NHS Pension Scheme |  |
| **NHS Pension Contributions** | <https://services.nhsbsa.nhs.uk/employer-service/fic/> | No | Submitting contributions via the Make Contribution Payments (MCP) system  *“NHS Pension contributions must reach our bank account by the 19th of the month following that in which they were deducted.*  *Where the 19th falls on a weekend, they must be paid by the last working day before the 19th.”* |  |
| **HMRC gateway login** | <https://www.gov.uk/log-in-register-hmrc-online-services> | No | Checking PAYE, VAT, etc |  |
| **National Workforce Reporting System (NWRS)** | [Improving the National Workforce Reporting Service (NWRS) - NHS Digital](https://digital.nhs.uk/data-and-information/areas-of-interest/workforce/national-workforce-reporting-service-nwrs/content) | No | The National Workforce Reporting System is run by NHS Digital to collect and present Primary Care workforce based data. The NWRS is made up of two modules accessible through this portal.  The data entry module is an update of the former workforce census module, which is where general practices can add their workforce information, to fulfil their requirements for the workforce Minimum Data Set (wMDS). |  |
| **General Practice Annual Electronic Self-Declaration (eDEC)** | <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections/general-practice-annual-electronic-self-declaration-edec> | No | The electronic practice self-declaration (eDEC) is a mandatory collection which all GP practices in England must complete every year. |  |
| **Primary Care (GP and Dental) Complaints Collection - KO41b** | <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections/primary-care-gp-and-dental-complaints-collection-ko41b>  <https://complaints.sdcs.digital.nhs.uk/> | No | *“The NHS in England has a statutory responsibility to collect service wide data on patient complaints so trends can be identified, and we can demonstrate that the service is being responsive to patient feedback. Primary care providers are required to provide brief details of by submitting a KO41b return.”* |  |
| **Immform** (baby vaccinations, shingles, baby flu ordering) | <https://portal.immform.phe.gov.uk/Logon.aspx>? |  | ImmForm is a Public Health England (PHE) website used to collect data on vaccine uptake for immunisation programmes and to provide vaccine ordering facilities for the national immunisation programme and some products used for urgent treatments, such as antivenom for the European Adder.  An ImmForm account is also required if you access immunoglobulins for urgent treatment which are ordered through RIGS@phe.gov.uk |  |
| **ONPOS** | <https://onpos.co.uk/login.php> | No | ONPOS is the leading non-prescription ordering service. NHS use ONPOS for ordering dressings. |  |
| **Primary Care Indicators Dashboard** | <http://www.primarycareindicators.nhs.uk/> | No | This dashboard provides access to General Practice Indicators and GPIT Digital Maturity Index as previously presented in the NHS England primary care website. |  |
| **Female Genital Mutilation Datasets** | <https://digital.nhs.uk/data-and-information/clinical-audits-and-registries/female-genital-mutilation-datasets>  <https://clinicalaudit.hscic.gov.uk/> | No | The Female Genital Mutilation (FGM) Enhanced Dataset supports the Department of Health's FGM Prevention Programme by presenting a national picture of the prevalence of FGM in England.  NHS organisations and new users must register to access CAP by completing the FGM Enhanced Dataset CAP user registration form. This form contains important guidance about the dataset for Caldicott Guardians and ICBs and General Practices.  NHS organisations have one month to submit their data after the end of each quarter before the data extraction for the report takes place. The dataset reports are published as an official statistics every quarter. |  |
| **EPS Prescription Tracker** | <https://digital.nhs.uk/services/electronic-prescription-service/about-the-eps-prescription-tracker>  <https://digital.nhs.uk/services/electronic-prescription-service/finding-an-electronic-prescription> | Yes | The Electronic Prescription Service (EPS) Prescription Tracker allows staff working at prescribing and dispensing sites to check the status of a prescription. |  |
| **Primary Care Support England (PCSE)** | <https://pcse.england.nhs.uk/help/using-pcse-online/gps-and-gp-practices-using-pcse-online/>  <https://secure.pcse.england.nhs.uk/portal/> | No | PCSE Online (previously referred to as the ‘PCSE Portal’) currently provides primary care providers with a quick and easy way for ordering and tracking your NHS stationery.  GP practices can also use PCSE Online to track the status of your in and out bound paper medical records, and to transfer / receive GMS3 forms. |  |
| **CQC Provider Portal** | <https://services.cqc.org.uk/public/login> | No | CQC Provider Portal is a service which allows registered providers to manage their registration details and submit notifications, in a quick and simple way. |  |
| **ePACT2** | <https://www.nhsbsa.nhs.uk/epact2>  <https://idcs-5e48a6c7d2ea4150bcdcdc847318d62b.identity.oraclecloud.com/ui/v1/signin> |  | ePACT2 gives authorised users access to prescription data.  ePACT2 provides easy-to-use analysis, reports and dashboards including the ability to:   * interrogate prescription data * create data visualisations using interactive reports and dashboards * look at high level data summaries down to individual prescription item detail * export data from reports and dashboards * access whole country data * view patterns of prescribing at patient level |  |
| **SHAPE Place Atlas** | <https://shapeatlas.net/>  <https://shapeatlas.net/place/> | No | Strategic Health Asset Planning and Evaluation (SHAPE) is a web enabled, evidence based application that informs and supports the strategic planning of services and assets across a whole health economy.  SHAPE links national data sets clinical analysis, public health, primary care and demographic data with information on healthcare estates performance and facilities location. The application also includes a fully integrated Geographical Information System mapping tool and supports travel time analysis. |  |
| **NHS Choices – Comment Response Tool** | <https://organisation.nhswebsite.nhs.uk/> | No | This is a new tool to respond to comments published on your NHS website provider profile.  If this is your first time using the new comment response tool then you must register, even if you used the previous NHS Website Organisation Response tool. |  |
| **NHS Mail Portal** | <https://portal.nhs.net/> | No | Maintain practice email, allows management of Teams |  |
| **NHS Jobs** | <https://www.jobs.nhs.uk/employers> | No | As a recruiter in the NHS, you may need to access NHS Jobs to manage vacancies, manage applications, review selected application forms as part of a shortlisting or interview panel or communicate with candidates throughout the recruitment process.  Your local NHS Jobs system administrator, usually a member of your organisation's recruitment team, will need to register a personal recruiter NHS Jobs account for you to do this. |  |
| **eConsult** | <https://econsult.net/primary-care/features/nhs-login-2> | No | eConsult enables NHS based GP practices to offer online consultations to their patients. This allows patients to submit their symptoms or requests to their own GP electronically and offers around the clock NHS self-help information, signposting to services, and a symptom checker. |  |
| **Outcomes4Health** | <https://outcomes4health.org/o4h/> | No | Local and national level analysis and reporting on the effectiveness of commissioned services, helping to improve the evidence base for community-based services. |  |

| **Regional Logins – generally ICB specific** | | | |
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| **Site** | **Web Address** | **What is it** | **Who / When** |
|  | | | |
| **HCC** | <https://in-tendhost.co.uk> | This is for the public health services – HCC is Hampshire County Council. Other areas will have something similar. |  |
| **Quasar** | <https://www.quasarprimary.nhs.net> | This is a ICB tool for reporting significant events etc. Will be different for other ICBs. |  |
| **Clarity TeamNet** | <https://teamnet.clarity.co.uk/> | TeamNet is a web-based platform that you can access at work, home, or on the move. It's designed for every member of your team to access information quickly and simplifies everyday internal processes. Deployed by ICBs. |  |
| **Vaxishop** | <https://www.vaxishop.co.uk/vaxishop/en/GBP/login> | Portal to order administered vaccines |  |
| **Seqirus** | [Account Dashboard | flu360 UK](https://www.flu360.co.uk/dashboard) | To access flu orders/information regarding account |  |
| **Wessex LMC** | <https://www.wessexlmcs.com/>  <https://www.wessexlmcs.com/account/logon> | Wessex Local Medical Committees (LMCs) is the only representative body, recognised by statute, for GPs and their Practices, operating across the counties of Dorset, Hampshire, the Isle of Wight, Somerset, and Wiltshire. We also provide services to the Islands of Jersey and Guernsey, representing in total, around 465 Practices and 3755 GPs, whether Partners, Salaried GPs, or freelance locums. We exist solely to represent, advise, and support GPs and their Practices. |  |

| **Useful Websites** | | |
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| **Site** | **Web Address** | **Description** |
|  | | |
| **Direct Enhanced Services** | <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections/quality-and-outcomes-framework-qof/quality-and-outcome-framework-qof-business-rules/enhanced-services-es-vaccination-and-immunisation-vi-and-core-contract-components-2022-2023> | Enhanced services (ES), Vaccination and Immunisation (V&I) and core contract components 2020-2021  NHS Digital has released the business rules for the Enhanced Services (ES), Vaccination and Immunisation (V&I) and core contract components for 2022-2023. This page will be updated as further ES (V&I) core contract business rules become available |
| **Quality and Outcomes Framework (QOF business rules)** | <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections/quality-and-outcomes-framework-qof> | NHS Digital are responsible for producing and maintaining the extraction specification (business rules) for Quality and Outcome Framework (QOF), Enhanced Services (ES), Vaccinations and Immunisations V&I, certain elements of Core Contact (CC) and other services commissioned by the Department of Health. |
| **QOF Point value and Prevalence** | <https://support-ew.ardens.org.uk/support/solutions/articles/31000158571> | This support article attempts to explain the calculations behind your QOF income. It is something which will perplex primary care forever, but see below our understanding. |
| **QOF database** | <https://www.gpcontract.co.uk/> | Provides national prevalence for long term conditions |
| **NICE QOF Indicators** | <https://cks.nice.org.uk/topics/diabetes-type-1/goals-outcome-measures/qof-indicators/> | Provides the indicators, points, thresholds and links to NICE guidelines. |
| **BMA COVID QOF** | <https://www.bma.org.uk/advice-and-support/covid-19/gp-practices/covid-19-toolkit-for-gps-and-gp-practices/qof-quality-and-outcomes-framework> | Due to the pandemic, QOF payments for 2020/21 will be calculated differently to normal. Some indicators are based on achievement, some are awarded in full and some are income protected.  Income protection is based on achievement in previous years but uprated for the 2020/21 QOF point value, prevalence and list size adjustment.  Therefore, it is not the case that practices will have a floor for payments equal to payments in previous years – it will be a different calculation |
| **QOF Technical** | <https://digital.nhs.uk/data-and-information/publications/statistical/quality-and-outcomes-framework-achievement-prevalence-and-exceptions-data/2019-20/technical-annex> | The Quality and Outcomes Framework (QOF) was introduced as part of the General Medical Services (GMS) contract on 1 April 2004. The objective of QOF is to improve the quality of care patients are given by rewarding GP practices for the quality of care they provide to their patients and is therefore, an incentive payment scheme, not a performance management tool. EXPLAINS QOF!!! |
| **GP Collections schedule** | <https://digital.nhs.uk/services/general-practice-gp-collections/gp-collections-schedule/gp-collections-schedule---march-2021>  <https://digital.nhs.uk/services/general-practice-gp-collections/gp-collections-schedule> | General Practice Extraction Service (GPES) collects information and data for a wide range of purposes including providing GP payments. It works in conjunction with the Calculating Quality Reporting System (CQRS) and GP clinical systems as part of the NHS Digital’s GP collections service. |
| **Child Immunisation** | <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections/cover-of-vaccination-evaluated-rapidly> | This quarterly collection reports on the immunisation coverage for three cohort age groups; 12 months, 24 months and 5 years for both the local authority and GP level data.  Please note that the GP level data is aggregate information collated and used in the normal course of business to inform operational delivery or the management of organisational performance. The information may be incomplete in places, is not quality assured to the same extent as official statistics and may not necessarily be fully representative. Data for the local authority level data is mandated and published as official statistics quarterly.  Data is collected for both local authority and GP level data quarterly from the Child Health Information System providers and submitted via the NHS Digital Strategic Data Collection Service (SDCS). |
| **Data collections** | <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections> | We manage a number of data collections covering many aspects of health and social care and collected from a wide variety of NHS trusts, local authorities, and independent-sector organisations. |
| **GP Contract** | <https://www.england.nhs.uk/gp/investment/gp-contract/> | This page sets out guidance and links to further resources to support implementation of changes to General Medical Services (GMS) contractual arrangements that will apply in England in 2021/22. |
| **How charges for NHS healthcare apply to overseas visitors** | <https://www.gov.uk/government/publications/how-the-nhs-charges-overseas-visitors-for-nhs-hospital-care/how-the-nhs-charges-overseas-visitors-for-nhs-hospital-care> | Within England, free NHS hospital treatment is provided on the basis of someone being ‘ordinarily resident’. Being ordinarily resident is not dependent upon nationality, payment of UK taxes, National Insurance contributions, being registered with a GP, having an NHS number or owning property in the UK.  Those who are not ordinarily resident in the UK, including former UK residents, are overseas visitors and may be charged for NHS services.  Treatment in A&E departments and at GP surgeries remains free for all. |
| **Requests to convert private prescriptions to NHS FP10** | <https://www.wessexlmcs.com/requeststoconvertprivateprescriptionstonhsfp10> | Under NHS GMS Regulations the patient is entitled to receive any drug which is available on the NHS, via an NHS prescription.  Therefore, GPs can convert a private script to an FP10 if the patient requests this.  However, the GMC duty to prescribe only in the best interests of the patient and only within your level of competence, takes priority.  There are a number of circumstances when prescribers will decline the request or offer to prescribe an alternative medicine. |
| **General practice data hub** | <https://digital.nhs.uk/data-and-information/data-tools-and-services/data-services/general-practice-data-hub> | This is a collection of interactive dashboards relating to general practice in England. |
| **National General Practice Profiles** | <https://fingertips.phe.org.uk/profile/general-practice> | These profiles are designed to support GPs, primary care networks (PCNs), clinical commissioning groups (ICBs) and local authorities to ensure that they are providing and commissioning effective and appropriate healthcare services for their local population.  In addition to viewing individual practice profiles, you can view summary profiles for PCNs, ICBs and other higher geographies. Each practice can be compared with the ICB or PCN and England. |
| **CSU** | <https://www.england.nhs.uk/tag/csu/> | Check your local CSUn to see what services they can offer re IT and training etc  (Hampshire practices only – CSU helpline for IG issues – 023 8062 7579 [SCWCSU.IGEnquiries@nhs.net](mailto:SCWCSU.IGEnquiries@nhs.net) |
| **Information Commissioners Office** | <https://ico.org.uk> | The UK’s independent authority set up to uphold information rights in the public interest, promoting openness by public bodies and data privacy for individuals. |
| **FutureNHS** | <https://future.nhs.uk/system/login?nextURL=%2Fconnect%2Eti%2FDigitalPC%2Fgrouphome> | FutureNHS Platform has a wealth of information on the Digital Primary Care Space. It requires sign up to access, but is very quick and easy |
| **Insight Solutions** | <https://www.insightsol.co.uk/> | Healthcare IT company for training and claiming QOF, Enhanced services etc |
| **General Practice Data for Planning and Research (GDPR)** | <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections/general-practice-data-for-planning-and-research> | Developing a new, more secure and more efficient way to collect patient data to improve health and care services, called the General Practice Data for Planning and Research data collection.  The system that collects GP data is over 10 years old and needs to be replaced. The new service replaces 300 individual collections with one single collection. This is more efficient, with stronger privacy protections for the data at all stages and reduces the burden on general practices. For these reasons we are developing a new way to collect this data, working with general practice, patients and the public and data experts, to develop a solution which is safe, trusted and which maintains privacy. This project is called GP Data for Planning and Research. |

| **Task** | **Frequency** | **Who** |
| --- | --- | --- |
|  | | |
| **Strategic Management** | | |
| Develop 5 year business plan for practice |  |  |
| Identify and implement strategic direction |  |  |
| Review and update clinical delivery model |  |  |
| Review and implement staffing model |  |  |
| Develop external relationships with ICB, Council, Strategic partners, etc |  |  |
| Identify and implement innovation |  |  |
| Maintain general awareness of opportunities and ICB expectations. |  |  |
|  | | |
| **General Management** | | |
| Arrange and attend meetings including partnership, staff, clinical governance, practice management, locality meeting, Target days. |  |  |
| Take and distribute minutes |  |  |
| Manage meeting actions |  |  |
| Manage, review and update policies, protocols and processes |  |  |
| Respond to ad hoc queries and questions from staff, external organisations and partners |  |  |
| Review Business Continuity Plan |  |  |
| Check, distribute and respond to emails | Daily |  |
| Read, understand and implement NHS guidance | Daily |  |
| LMC update – review, distribute & action | Weekly |  |
| ICB weekly update - review, distribute & action | Weekly |  |
| Update practice risk register |  |  |
| Friends & Family test upload to CQRS |  |  |
| Primary interface with NHSE, ICB & HCC |  |  |
| Manage contracts and contract variations: GMS, LSC, ES etc |  |  |
| Maintain general awareness of opportunities and ICB expectations |  |  |
| Plan and manage CQC inspections |  |  |
|  | | |
| **Line Management** | | |
| Line management of **Reception** Team |  |  |
| Line management of **Admin** Team |  |  |
| Line management of **Secretarial** Team |  |  |
| Line management of **Data** Team |  |  |
| Line management of **Coding** Team |  |  |
| Line management of **Scanning** Team |  |  |
| Line management of **Prescription** Team |  |  |
| Line management of **Summarising** Team |  |  |
| Line management of **Patient Records** Team |  |  |
| Line management of **Finance** Team |  |  |
| Line management of **IT** Team |  |  |
| Line management of **Quality** Team |  |  |
| Line management of **Nursing** Team - Clinical |  |  |
| Line management of **Nursing** Team - Admin |  |  |
| Line management of **Salaried GP** Team - Clinical |  |  |
| Line management of **Salaried GP** Team - Admin |  |  |
| Line management of **Other Clinical** Team - Clinical |  |  |
| Line management of **Other Clinical** Team - Admin |  |  |
|  | | |
| **HR Management** | | |
| Maintain job descriptions for above roles |  |  |
| Maintain & update contracts |  |  |
| Workforce Planning |  |  |
| Recruitment & selection |  |  |
| Induction & orientation |  |  |
| Probation reviews | 2,4 & 6 months |  |
| Annual appraisals |  |  |
| Manage HR issues, sickness, grievances & discipline |  |  |
| Manage holiday rota and leave requests |  |  |
| Manage HR documentation, including staff contracts, ID, NOK, staff handbook, confidentiality agreements, DBS, references, qualifications, certification, registrations, Hep B etc. |  |  |
| Manage training matrix and arrange training |  |  |
| Manage salary increase process |  |  |
| Self-certs/return to work completed |  |  |
| DSE assessment for all staff |  |  |
| Staff handbook update |  |  |
| DBS Annual declaration for all staff not due formal review |  |  |
|  | | |
| **Finance** | | |
| Maintain Account Package, codes, suppliers, customers, bank | Weekly |  |
| Post supplier invoices to accounts package | Weekly |  |
| Create customers invoices in accounts package & submit | Weekly |  |
| Approve purchase invoices & payments | Monthly |  |
| Maintain employee details for payroll | Monthly |  |
| Submit monthly payroll figures for processing | Monthly |  |
| Approve Monthly Payroll, Payroll updates/changes & Overtime | Monthly |  |
| Approve HMRC & NHS Pension payments & submission | Monthly |  |
| Prepare and submit NHS Pension updates (SD55) and annual summary | Annually |  |
| Manage non-NHS invoicing and credit control | Annually |  |
| Pay Salaries and Partner drawings | Monthly |  |
| Manage Tax, Payroll and Pension queries | As Required |  |
| Manage petty cash and CC payment receipts | Weekly |  |
| Cash and cheques to bank | Weekly |  |
| Bank reconciliation | Weekly |  |
| Setting up and managing DD and Standing Orders |  |  |
| Entering NHS income statements |  |  |
| Implement and maintain financial governance |  |  |
| Budget setting |  |  |
| Prepare Management Accounts |  |  |
| Manage accounts queries from partners and accountants |  |  |
| Manage relationships with bank, accountant etc. |  |  |
| Manage pension scheme NHS |  |  |
| Manage pension scheme NEST |  |  |
| Advise on ad hoc financial matters | As Required |  |
| Pensions Regulator Assessment | 3 years |  |
| Stock check for annual accounts |  |  |
| HMRC annual return |  |  |
| P60s / P11 / P14 | March |  |
| GP earnings declaration |  |  |
| List size calculations download |  |  |
| Liaise with NHS Property Services over building leases |  |  |
| |  |  |  | | --- | --- | --- | | **PCN Management** | | | | Attending PCN PM & board meetings | As required | Practice Manager | | Submitting claims for attached staff | As required | Practice Manager | | Managing payments to attached staff | As required | Practice Manager | | Manage performance of IIF targets | As required | Practice Manager | | | |
| **Income** | | |
| Childhood Imms submission |  |  |
| LARCS claim |  |  |
| Learning Disability claim |  |  |
| Minor Surgery claim |  |  |
| Approve & Submit FP34 & Bulk Drugs Claim |  |  |
| QoF Declaration |  |  |
| Checking QoF aspiration |  |  |
| Water rates reimbursement |  |  |
| Rate reimbursement |  |  |
| Clinical waste reimbursement |  |  |
| CQC reimbursements |  |  |
| Monthly reimbursements for maty, paty & sickness |  |  |
| Manage CQRS activities, service acceptance and manual inputs |  |  |
| Prepare and submit monthly, quarterly and annual plans and reports as required by specific contracts. |  |  |
| Manage QOF recall process |  |  |
| Manual Upload HPV booster |  |  |
| Manual Upload Hep B Newborn |  |  |
| Manual Upload PCV Hib |  |  |
| Manual Upload Men C |  |  |
| Check auto figures for Pertussis |  |  |
| Check auto figures for Rotavirus |  |  |
| Check auto figures for pneumococcal |  |  |
| Check auto figures for shingles |  |  |
| Check auto figures for shingles catch up |  |  |
| Check auto figures for Men ACWY |  |  |
| Check auto figures for Men B |  |  |
| Check auto figures for MMR |  |  |
| Check auto figures for flu |  |  |
| Check auto figures for childhood flu |  |  |
| Insurance reports |  |  |
| Private fees |  |  |
| Registrar claims (after payment) |  |  |
| Medical students claim (after placement) |  |  |
| Check Immform for flu figure updates |  |  |
| Open Exeter review for GMS & drug payments |  |  |
| Flu clinic planning |  |  |
| Review of updated contracts, QoF, PHE, DES, LES |  |  |
| Review private fees/charges |  |  |
|  | | |
| **Plan & Achieve QoF Indicators** | | |
| Atrial fibrillation (AF) |  |  |
| Secondary prevention of coronary heart disease (CHD) |  |  |
| Heart failure (HF) |  |  |
| Hypertension (HYP) |  |  |
| Peripheral arterial disease (PAD) |  |  |
| Stroke and TIA (STIA) |  |  |
| Diabetes mellitus (DM) |  |  |
| Asthma (AST) |  |  |
| Chronic obstructive pulmonary disease (COPD) |  |  |
| Dementia (DEM) |  |  |
| Depression (DEP) |  |  |
| Mental health (MH) |  |  |
| Cancer (CAN) |  |  |
| Chronic kidney disease (CKD) |  |  |
| Epilepsy (EP) |  |  |
| Learning disabilities (LD) |  |  |
| Osteoporosis: secondary prevention of fragility fractures (OST) |  |  |
| Rheumatoid arthritis (RA) |  |  |
| Palliative care (PC) |  |  |
|  | | |
| **Plan & Achieve Public Health** | | |
| Cardiovascular disease – primary prevention (CVD-PP) |  |  |
| Blood pressure (BP) |  |  |
| Obesity (OB) |  |  |
| Cervical screening (CS) |  |  |
|  | | |
| **Plan & Achieve LCS** | | |
| ADHD monitoring |  |  |
| Anticoagulation (Warfarin management) |  |  |
| Anti-psychotic Medication (Long acting injections – LSI’s) |  |  |
| Buddy referral |  |  |
| Cancer care review |  |  |
| Care home |  |  |
| Complex wound dressings |  |  |
| Diabetes (holistic care) |  |  |
| Diabetes (initiation of insulin) |  |  |
| Drug Monitoring |  |  |
| Ear irrigation |  |  |
| Influenza vaccination (for at risk groups) |  |  |
| Long Acting Reversible Contraception (LARC) non-contraceptive purposes |  |  |
| Influenza (response to localized community outbreak – in and out of season periods) |  |  |
| Leg Ulcer management |  |  |
| Mental health plus |  |  |
| Nepali Support |  |  |
| Pessary fitting / removal |  |  |
| Phlebotomy |  |  |
| PSA monitoring |  |  |
| Working at scale |  |  |
|  | | |
| **Plan & Achieve DES** | | |
| Extended Hours Access Scheme |  |  |
| Network Contract (PCN) Scheme |  |  |
| Learning Disability Health Check Scheme |  |  |
| Minor Surgery Scheme |  |  |
| Childhood Immunisation Scheme |  |  |
| Hepatitis B at risk new-born babies |  |  |
| HPV completing dose |  |  |
| Meningococcal ACWY Freshers |  |  |
| Meningococcal B |  |  |
| Meningococcal completing dose |  |  |
| MMR |  |  |
| Rotavirus |  |  |
| Routine Shingles |  |  |
| Shingles catch-up |  |  |
| Childhood seasonal influenza |  |  |
| Pertussis |  |  |
| Seasonal influenza and pneumococcal polysaccharide |  |  |
|  | | |
| **Partnership & Salaried** | | |
| Prepare information for annual accounts | Annually |  |
| Arrange & present annual account meeting | Annually |  |
| Distribute annual accounts | Annually |  |
| Submit partners/salaried GP superannuation forms | Annually & As Req’d |  |
| Partner account - reconciliation |  |  |
| New partner – CQC countersigned DBS |  |  |
| New to partnership form |  |  |
| Salaried GP leaver & joiner NL3 |  |  |
| Estimate of pensionable profits form |  |  |
| Bank set up / removal for partners |  |  |
| Change of partnership board & headed paper |  |  |
| Change of partnership agreement |  |  |
| Update website & booklet |  |  |
| Add / remove to partnership loans |  |  |
|  | | |
| **Premises** | | |
| Emergency lighting check |  |  |
| Fire alarms check |  |  |
| Cleaning schedules upload |  |  |
| Fire safety check |  |  |
| Health & safety check |  |  |
| Infection control audit |  |  |
| Asbestos audit |  |  |
| Wiring safety certificate |  |  |
| Automatic door service |  |  |
| Burglar alarm service |  |  |
| Fire Alarm Annual Service | 6 months |  |
| Boiler service | Annually |  |
| Legionella water sampling | Monthly |  |
| Cleaning contract review | Annually |  |
| Fire extinguishers check | Annually |  |
| COSHH updates | Monthly |  |
| Equipment calibration | Annually |  |
| PAT testing | Annually |  |
| Legionella water temperature checks | Monthly |  |
| Panic alarm testing | 6 months |  |
| Fridge data loggers checks | Daily |  |
| First Aid box contents |  |  |
| First aid needs assessment |  |  |
| Fridge service |  |  |
| Evac Chair and wheelchair service |  |  |
| Asset register - Hardware |  |  |
| Ladder inspection |  |  |
| Spill kit review |  |  |
| Manage equipment leases and maintenance contracts |  |  |
| Energy Display Certificate | 10 years |  |
| Maintenance tasks | As Req’d |  |
| Notional rent review - | 3 years |  |
| Waste Consignment report | Quarterly |  |
| Hazardous Waste Notices |  |  |
| Policies/Procedures review |  |  |
| Building and grounds maintenance |  |  |
|  | | |
| **Risk Assessments** | | |
| Fire |  |  |
| Legionnaires |  |  |
| COSHH |  |  |
| Lone working |  |  |
| Slips trips and falls |  |  |
| DBS |  |  |
| Working at heights |  |  |
| Blood borne viruses |  |  |
| COVID 19 |  |  |
| Moving & handling |  |  |
| Health & safety |  |  |
| Infection control |  |  |
| Chaperoning |  |  |
| Pregnancy & working |  |  |
| Security |  |  |
| First aid |  |  |
|  | | |
| **Insurance** | | |
| Ensure all NMC & GMC registrations valid |  |  |
| Car insurance check for business use |  |  |
| Practice insurance – business continuity, building, content, etc |  |  |
| Indemnity renewal |  |  |
| Locum insurance renewal |  |  |
|  | | |
| **Operational** | | |
| Prepare clinical rota and room allocation | Monthly |  |
| Manage locum staff bookings, orientation, training and performance. | Monthly |  |
| Manage staff rota | Monthly |  |
| Manage reception rota | Monthly |  |
| Schedule specialist clinics & rooms | Monthly |  |
| MJOG/Accurx failed messages | Weekly |  |
| Maintain complaints register |  |  |
| Respond to complaints |  |  |
| KO41b Complaints Return |  |  |
| Maintain significant events register |  |  |
| Review and action significant events |  |  |
| Upload significant to ICB |  |  |
| MHRA Drug Safety Update |  |  |
| Review NHS Digital CareCERT |  |  |
| Remove access to online records for 11-16 yr olds |  |  |
| Infection control annual statement declaration for website |  |  |
| Prepare and host CQC inspection |  |  |
| Maintain ICO registration |  |  |
| National Diabetes Audit |  |  |
| Manage insurance reports |  |  |
| Manage SAR requests |  |  |
| Access to medical records |  |  |
| Child protection |  |  |
|  | | |
| **Training & Trainees** | | |
| Maintain minimum skills and competencies matrix for all roles |  |  |
| Maintain a training needs assessment for all staff |  |  |
| Manage and update Statutory and Mandatory training. |  |  |
| Manage additional training via in-house, external or online resources |  |  |
| Maintain training records and update requirements |  |  |
| Record and evidence clinical letters of competence, approvals etc. |  |  |
| Liaise with deanery, educational establishments and students over placements |  |  |
|  | | |
| **Clinical Management** | | |
| Manage annual flu programme and vaccine ordering |  |  |
| Manage & order childhood flus |  |  |
| Plan introduction of new services with clinical leads. |  |  |
| Referrals audit |  |  |
| Manage PGDs & PSDs |  |  |
| Controlled drug declaration |  |  |
| Crash trolley update |  |  |
| Stock clinical rooms |  |  |
| Vaccine management / cold chain |  |  |
|  | | |
| **Meetings** | | |
| Partner meeting |  |  |
| Salaried GP Meeting |  |  |
| Nurse Meeting |  |  |
| Management meeting |  |  |
| Finance meeting |  |  |
| Reception meeting |  |  |
| Clinical meeting |  |  |
| PPG meetings |  |  |
| Significant event meetings |  |  |
| Practice meetings |  |  |
| MDT meeting |  |  |
|  | | |
| **Patient Relationships** | | |
| Respond to ad hoc queries in person, in writing and by telephone |  |  |
| Manage medical reports & record access |  |  |
| Manage difficult patients in surgery, in writing and by telephone |  |  |
| Manage formal complaints |  |  |
| Prepare and submit Annual Complaints summary |  |  |
| Manage Lloyd George records |  |  |
| Manage Registrations and Deductions |  |  |
| Facilitate PPG meetings |  |  |
| Patient engagement and surveys |  |  |
| Manage appointment reminders and recalls |  |  |
|  | | |
| **Procurement & Stock Control** | | |
| Maintain ‘basket’ of goods for clinical and non-clinical in Surgery Network |  |  |
| Set minimum stock levels and ordering points |  |  |
| Manage stock of clinical & non-clinical across all sites |  |  |
| Manage Suppliers |  |  |
| Create purchase orders for clinical & non clinical |  |  |
| Check price of all goods against lowest paid |  |  |
| Approve purchase orders |  |  |
| Maintain good-inwards and match to purchase order |  |  |
|  | | |
| **IT / IG** | | |
| Manage Supplier relationships with EMIS, Docman, DXS, Control-IT, Lexacom, INRStar, Patient Partner, Egton, eConsult, MJog |  |  |
| IT problem/fault rectification |  |  |
| Manage IT upgrades and new installations. |  |  |
| Manage relationships with CSU (networks) and Healthcare Computing (hardware) |  |  |
| Develop EMIS templates, searches, prompts and alerts |  |  |
| Develop and run audits for GPs |  |  |
| Liaise with telephone system supplier (faults/updates) |  |  |
| Manage Information Governance/GDPR |  |  |
| Liaise with Practice DPO |  |  |
| Prepare and submit annual IG Toolkit/Data Security Assessment |  |  |
| Manage DSAs |  |  |
| Manage NHSMail accounts & IT access |  |  |
| Interface to path lab/Sunquest |  |  |
| GP links interface to PCSE |  |  |
| Manage patient access to online services |  |  |
| Maintain practice website |  |  |
| Maintain awareness of emerging technology developments |  |  |
| Maintain AccuRx application |  |  |
| Maintain Surgery Network system |  |  |
| Maintain Blue Stream |  |  |
| Maintain Bright HR |  |  |
| Maintain QCS |  |  |
| Maintain Xero |  |  |
| Maintain DSP Toolkit |  |  |
| Prepare and submit annual eDec |  |  |
| Manage data input to Alamac |  |  |
| Submit NHS national survey data (workforce, diabetes audit etc) |  |  |
| Provide access to IT systems |  |  |
| Manage smart cards |  |  |
| Manage TP access to data |  |  |
| Maintain eReferral |  |  |
|  | | |
| **Practice Projects** | | |
| Childhood Imms Claim |  |  |
| Superannuation Reconciliation |  |  |
| BACS Set Up |  |  |
| NHS Pension Reconciliation |  |  |
| Financial Governance Process |  |  |
| Financial Governance Implementation |  |  |
| COVID Lost Income Claim |  |  |
| CB Locum Insurance |  |  |
| MDU Reconciliation |  |  |
| NHS Property Claim |  |  |
| NHS Property Claim |  |  |
| Notional Rent Review |  |  |
| Re-finance |  |  |
| Victoria Final Reconciliation |  |  |
| Decision Consequence Sheet |  |  |
| Complete Account Queries |  |  |
| Minor Ops Reporting Rebuild |  |  |
| Payroll - past records |  |  |
| Appraisals |  |  |
| Job Descriptions |  |  |
| Quality Reporting |  |  |
| Pay Structure |  |  |
| Staff Survey |  |  |
| CQC Requirements - Complete |  |  |
| Management Reporting Pack - starter |  |  |
| GP Sessions -Benchmark |  |  |
| Nurse Sessions - Benchmark |  |  |
| Clinical Delivery – Cost Effective |  |  |
| Staff Levels - Benchmark |  |  |
| Bright HR |  |  |
| Blue Stream |  |  |
| QCS |  |  |
| Surgery Network |  |  |
| Flu Campaign |  |  |
| PPG |  |  |
|  | | |
| **Merger Incubation** | | |
| Function Documents |  |  |
| Finance |  |  |
| Human Resources |  |  |
| Income Streams |  |  |
| Procurement |  |  |
| Data / Summarising |  |  |
| Reception |  |  |
| Administration |  |  |
| Information Technology |  |  |
| Practice Management |  |  |
| Secretarial |  |  |
| Nursing |  |  |
| GP / Other Clinical |  |  |