

TEAMWORK RESEARCH STUDY

**Enhancing The Role Of Non-GP Staff In Chronic Disease
Management In General Practice**

SECTION 2 - INTERVENTION WORKBOOK

PATIENT EDUCATION AND RESOURCES

For patients with diabetes, ischaemic heart disease / hypertension





Table of Contents

Resource	Page No.
The Intervention Process & Resource Summary	<u>3</u>
The Five Elements of Team Building	<u>4</u>
The Intervention Record	<u>5</u>
Needs Analysis Scale	<u>7</u>
Goal Setting Worksheet	<u>15</u>
Decision Making Worksheets	<u>17</u>
Written Procedures Worksheets	<u>20</u>
Instructions For Using Task Allocation Checklist	<u>28</u>
Task Allocation Checklists	<u>29</u>
Communication Worksheet	<u>32</u>
Written Procedure Template	<u>34</u>
Training Worksheet	<u>35</u>
Review Schedule	<u>37</u>



The Intervention Process & Resource Summary: Section 2; Patient Disease Registers

Process Step	Resources To Use	Page No.
1. Identify readiness for change & practice needs	<ul style="list-style-type: none"> ▪ Readiness for Organisational Change Scale ▪ Needs Analysis Scale 	Completed previously
2. Review elements of team building	<ul style="list-style-type: none"> ▪ The Five Elements of Team Building 	▶ 4
3. Work through Section 2; Patient Disease Registers	<ul style="list-style-type: none"> ▪ Section 2; Patient Disease Registers ▪ Intervention Record 	▶ 5
4. Review Needs Analysis	<ul style="list-style-type: none"> ▪ Needs Analysis Scale ▪ Intervention Record 	▶ 7 ▶ 5
5. Practice team sets achievable goals and a time frame	<ul style="list-style-type: none"> ▪ Goal setting worksheet ▪ Intervention Record 	▶ 15 ▶ 5
6. Decide on the process/es that will be required	<ul style="list-style-type: none"> ▪ Decision-making worksheets ▪ Intervention Record 	▶ 17 ▶ 5
7. Write down the process/es and compile “written procedures”	<ul style="list-style-type: none"> ▪ Written procedures worksheets 	▶ 20
8. Allocate tasks within the process/es	<ul style="list-style-type: none"> ▪ Instructions for using task allocation checklist ▪ Task allocation checklists ▪ Intervention Record 	▶ 28 ▶ 29 ▶ 5
9. Add the task allocations to the written procedures	<ul style="list-style-type: none"> ▪ Written procedures worksheets 	▶ 20
10. Decide what type of communication is necessary; when and how	<ul style="list-style-type: none"> ▪ Communication worksheet 	▶ 32
11. Incorporate the communication element into the written process	<ul style="list-style-type: none"> ▪ Written procedures worksheets 	▶ 20
12. Finalise written procedure	<ul style="list-style-type: none"> ▪ Written procedure template ▪ Intervention Record 	▶ 34 ▶ 5
13. Identify training needs; upskill as necessary	<ul style="list-style-type: none"> ▪ Training worksheet ▪ Intervention Record 	▶ 35 ▶ 5
14. Implement the new or modified procedure	<ul style="list-style-type: none"> ▪ Final written procedure ▪ Intervention Record 	▶ 5
15. Review the procedure and modify as necessary, modify the written procedure as necessary; set a new review date	<ul style="list-style-type: none"> ▪ Review schedule ▪ Written procedure produced by the practice team for modification ▪ Training worksheet 	▶ 37 ▶ 35
16. Review the intervention	<ul style="list-style-type: none"> ▪ Intervention record 	▶ 5
17. Complete unfinished tasks	<ul style="list-style-type: none"> ▪ As required ▪ Intervention Record 	▶ 5
18. Complete needs analysis & choose another section on which to work; repeat steps 1-17	<ul style="list-style-type: none"> ▪ Needs Analysis Scale ▪ New Section ▪ The Intervention Workbook for that section 	



How do we build teams?

As you read through this resource, it may be beneficial to consider the five key elements of team building that are summarized in the table below. These elements represent the key considerations when putting teamwork into action.

The Five Key Elements of Team Building¹

Elements of team building	In other words....
<p>1. Clear goals with measurable outcomes Examples:</p> <ul style="list-style-type: none"> ▪ Improve patient's health <ul style="list-style-type: none"> • Measurable outcome: at least 80% of practice patients with diabetes will have HbA_{1c} < 8 ▪ Improve practice's financial performance <ul style="list-style-type: none"> • Measurable outcome: practice will achieve a targeted level of quarterly practice revenue ▪ Increase doctor and staff satisfaction <ul style="list-style-type: none"> • Measurable outcome: Each team-member has achieved a specified goal for personal professional development 	<p>1. What do we want to achieve as a practice team and how will we know when we've achieved it?</p>
<p>2. Division of labour</p> <ul style="list-style-type: none"> ▪ Definition of tasks and assignment of roles ▪ What tasks routinely performed by GPs can non-GP staff take on? 	<p>2. What are the tasks that need to be done, who will do them and how?</p> <ul style="list-style-type: none"> ▪ What doesn't <i>really</i> need to be done by a GP?
<p>3. Communication</p> <ul style="list-style-type: none"> ▪ Build structures; for example: <ul style="list-style-type: none"> • Routine communication; paper / electronic • Verbal interactions among team-members • Team meetings ▪ Formulate processes; for example: <ul style="list-style-type: none"> • Procedure for giving feedback • Procedure for conflict resolution 	<p>3. How will we communicate with each other both in general and about issues within a specific system?</p> <ul style="list-style-type: none"> ▪ What types of things do we need to discuss and when? ▪ What sorts of things should be written? ▪ What information do we have to pass on to someone else and how will we do it?
<p>4. Clinical and administrative systems Examples:</p> <ul style="list-style-type: none"> ▪ Procedures for informing patients of results ▪ Procedure for making patient appointments ▪ Policies on how decisions are made in the medical practice 	<p>4. What instructions do we need to write and follow for the things we do?</p> <ul style="list-style-type: none"> ▪ When you have answered Questions 1,2 and 3, then you have a system ▪ When you write down "who does what, when and how you do things" you have written procedures
<p>5. Training</p> <ul style="list-style-type: none"> ▪ Each team-member is trained for the functions they routinely perform ▪ Cross-training to allow for back-up 	<p>5. Who needs training in order to do their jobs with competence and confidence?</p>

1. K. Grumbach and T. Bodenheimer; *Can health care teams improve primary health care practice?* JAMA March 2004 Vol 291 No. 10



The Intervention Record: Section 2; Patient Disease Registers

Elements	Outcomes
<p>1. Identify practice needs</p> <ul style="list-style-type: none"> ▪ What areas do we need to work on? 	
<p>2. Work through Section 2; Patient Disease Registers</p>	<p>Completed <input type="checkbox"/> Date: _____</p>
<p>3. Review Needs Analysis</p> <ul style="list-style-type: none"> ▪ Do we need to modify needs identified in step 1? 	
<p>4. Set goals: what do we want to achieve as a practice team and how will we know when we've achieved it?</p> <ul style="list-style-type: none"> ▪ Set the goal ▪ Set the target date 	
<p>5. Division of labour: what are the tasks that need to be done, who will do them and how?</p> <ul style="list-style-type: none"> ▪ What doesn't <i>really</i> need to be done by a GP? 	<p>A. Has the process decision checklist been completed? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p> <p>B. Has the task allocation checklist been completed? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p>
<p>6. Communication: how will we communicate with each other both in general and about issues within a specific system?</p> <ul style="list-style-type: none"> ▪ What do we need to discuss and when? ▪ What sorts of things should be written? ▪ What information do we have to pass on to someone else and how will we do it? ▪ Build structures; for example: <ul style="list-style-type: none"> • Routine communication; paper / electronic • Team meetings 	<p>A. Have we decided on the communication systems? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p>



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

Elements	Outcomes
<p>7. Clinical and administrative systems: what instructions do we need to write for the things we do?</p> <ul style="list-style-type: none"> ▪ When you have answered Questions 1,2 and 3, then you have a system ▪ When you write down “who does what, when and how you do things” you have written procedures 	<p>A. Have the processes been written down Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p> <p>B. Do the written procedures incorporate task allocation? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p> <p>C. Do the written procedures incorporate the communication system? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p>
<p>8. Who needs training in order to do their jobs with competence and confidence?</p> <ul style="list-style-type: none"> ▪ Each team-member is trained for the functions they routinely perform ▪ Cross-training to allow for absences or periods of heavy demand 	<p>A. Have the training needs been identified? Yes <input type="checkbox"/> No; due for completion by: _____</p> <p>B. Has a training schedule been organized? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p> <p>C. Has all the training taken place? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p>
<p>9. Implementation of the new/modified process</p>	<p>A. Has the implementation begun? Yes <input type="checkbox"/> Date: _____ No; due for _____</p>
<p>10. Review</p> <ul style="list-style-type: none"> ▪ Review process ▪ Review skills ▪ Review written procedure 	<p>A. Has the review been completed? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p> <p>B. Have actions arising been undertaken? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p> <p>C. Have the written procedures been updated? Yes <input type="checkbox"/> Date: _____ No; due for completion by _____</p> <p>D. The next review is due on: _____</p>



Needs Analysis Scale

NOTE: All indicators relate to patients with diabetes or IHD/hypertension

The aim of this Needs Analysis Scale is to assist your practice to identify the areas where teamwork is used effectively and also those areas where teamwork could be improved.

The analysis consists of two parts:

- Part A: Assessing the systems currently in place in your practice
- Part B: Selecting up to three areas to develop / improve upon

Once you have identified the areas (up to three areas) that you would like to develop or improve upon, your team can introduce some changes that will assist your practice to operate more effectively and efficiently in conjunction with the research team.

PART A. Assessing the systems currently in place in your practice

- This part consists of 11 systems for good chronic disease care in general practices.
- Please look at the indicators within each system and identify how your system operates in relation to these indicators.
- Assess each indicator from the three perspectives described below and tick the boxes in each column as applicable:

SAT	Satisfactory / In operation
NGP?	Are non-GP staff involved?
D / I	Needs development / improvement

- You can choose more than one box per indicator

SAT Satisfactory / In operation
NGP? Are non-GP staff involved?
D / I Would like to develop / improve

Section 1. Structured Appointment System

Indicators	SAT	NGP?	D / I
	√	√	√
▪ A flexible system which accommodates urgent, non-urgent, planned chronic and preventative care and supports multiple clinical providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Patients are informed that longer consultations are available on request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Patients are informed that they can request the practitioner of their choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Practice provides information to patients about consultation fees and associated costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ All relevant staff understand, can access and operate and have clearly defined roles in maintaining and using the appointment system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 2. Patient Disease Registers

Indicators	SAT	NGP?	D / I
	√	√	√
▪ Patient disease registers covering minimum clinical data sets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Evidence of a system that is maintained and regularly used to identify patients for recall and reminder follow-up as part of ongoing health management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ All staff involved in patient disease registers understand the system and have clearly defined roles in maintaining and using the register	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Written procedures for building, maintaining and using patient disease registers are in place and understood and adhered to by all staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SAT Satisfactory / In operation
NGP? Are non-GP staff involved?
D / I Would like to develop / improve

Section 3. Recall & Reminder System

Indicators	SAT	NGP?	D / I
	√	√	√
▪ All encompassing systematic recall & reminder system is in operation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Practice follows up all patients who do not attend their appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ All staff involved in the recall and reminder system have clearly defined roles in maintaining and using the registers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ All relevant staff are aware of and adhere to the procedures for recall and reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Written procedures for an active practice initiated recall and reminder system for ongoing management for diabetes (including reminder to complete annual cycle of care), IHD & hypertension	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 4. Patient Education & Resources

Indicators	SAT	NGP?	D / I
	√	√	√
▪ Patients receive appropriate education in the practice or are referred to external organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ All staff involved in patient education and resources have clearly defined roles in maintaining and using up-to-date, relevant and culturally appropriate resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ All relevant staff are aware of and adhere to the procedures for ordering and using patient education and resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Written procedures for collating, storing, updating and distributing relevant, culturally appropriate patient education and resources from credible evidence based sources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



SAT Satisfactory / In operation
NGP? Are non-GP staff involved?
D / I Would like to develop / improve

Section 5. Planned Care

Indicators	SAT	NGP?	D / I
	√	√	√
<ul style="list-style-type: none"> ▪ Documented planned care (including medication reviews) according to best available evidence is systematically implemented 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Patients are informed of and are involved in their planned care 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ All staff involved in planned care have clearly defined roles and responsibilities in providing planned care 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written procedures for accessing, updating according to best available evidence and providing planned care are in place and understood and adhered to by all staff 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 6. Practice Based Linkages

Indicators	SAT	NGP?	D / I
	√	√	√
<ul style="list-style-type: none"> ▪ Referrals contain adequate information to facilitate optimal patient care 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Procedure and system for storing, updating and distributing an updated directory of practice based linkages to a broad range of necessary services 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ All staff involved in practice based linkages have clearly defined roles and responsibilities in updating, reviewing (including patient feedback) and using a directory of practice based linkages 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written procedures for maintaining, storing and distributing an updated directory of practice based linkages to a broad range of necessary services 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written procedures for referral to another health care provider are in place and understood and adhered to by all staff 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SAT Satisfactory / In operation
NGP? Are non-GP staff involved?
D / I Would like to develop / improve

Section 7. Roles, Responsibilities & Job Descriptions

Indicators	SAT	NGP?	D / I
	√	√	√
<ul style="list-style-type: none"> ▪ All staff involved in providing and supporting planned care have clearly defined roles and responsibilities 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Regular reviews of roles and responsibilities, job descriptions 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Regular review of performance including remuneration and training needs analyses are carried out 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written job descriptions for all staff involved in providing and supporting planned care are available 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written procedures for conducting the necessary reviews and updating roles, responsibilities and job descriptions are in place and understood and adhered to by all staff 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 8. Communication & Meetings

Indicators	SAT	NGP?	D / I
	√	√	√
<ul style="list-style-type: none"> ▪ Regular meetings are held to discuss clinical and non-clinical issues 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Each staff member attends those meetings at which topics relevant to them will be discussed 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Meetings have pre-determined agendas, action points and minutes are generated that are accessible to all relevant staff 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Formal as well as informal channels of communication are in place 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written procedures regarding meetings and communication are in place and understood and adhered to by all staff 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SAT Satisfactory / In operation
NGP? Are non-GP staff involved?
D / I Would like to develop / improve

Section 9. Practice Billing System

Indicators	SAT	NGP?	D / I
	√	√	√
<ul style="list-style-type: none"> ▪ There is a billing system which supports all elements of multidisciplinary care 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ All staff understand the relevant Medicare item numbers and patients are informed of any costs 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ A communication system between clinical and administrative staff is in place to ensure appropriate billing at the conclusion of each consultation 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ All staff involved in billing have clearly defined roles and responsibilities 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written procedures for billing are in place and understood and adhered to by all staff 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 10. Record Keeping

Indicators	SAT	NGP?	D / I
	√	√	√
<ul style="list-style-type: none"> ▪ At least 90% of active patient health records contain a record of allergies in the health summary and at least 50% of active patient records contain a satisfactory health summary 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ The practice is working towards recording self-identified cultural background and emergency contact people for each patient 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ All staff has clearly defined roles and responsibilities with regard to record keeping 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ All staff access and contribute sufficiently to records relevant to their specific role 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> ▪ Written procedure covering comprehensive, systematic, accurate and secure health information management of quality data is in place and understood and adhered to by all staff 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SAT Satisfactory / In operation
NGP? Are non-GP staff involved?
D / I Would like to develop / improve

Section 11. Quality

Indicators	SAT	NGP?	D / I
	√	√	√
▪ A quality improvement cycle involving planning, implementation, review and refinement (PDSA) is in operation in the practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ All staff have clearly defined and understood roles and responsibilities in adhering to, maintaining, reviewing and updating the quality cycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Documentation to support the quality cycle is available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Systems are in place to collect data e.g. patient surveys, record audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ Written procedures describing the quality cycle are in place and understood and adhered to by all staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



PART B. Selecting up to three areas to develop or improve upon

Select up to three sections that you would like to develop or improve upon; these are the areas that you will work on with the research team.

Sections	√
Section 1. Structured Appointment System	<input type="checkbox"/>
Section 2. Patient Disease Registers	<input type="checkbox"/>
Section 3. Recall and Reminder System	<input type="checkbox"/>
Section 4. Patient Education and Resources	<input type="checkbox"/>
Section 5. Planned Care	<input type="checkbox"/>
Section 6. Practice Based Linkages	<input type="checkbox"/>
Section 7. Roles, Responsibilities and Job Descriptions	<input type="checkbox"/>
Section 8. Communication and Meetings	<input type="checkbox"/>
Section 9. Practice Billing System	<input type="checkbox"/>
Section 10. Record Keeping	<input type="checkbox"/>
Section 11. Quality	<input type="checkbox"/>



Goal Setting Worksheet: Section 2; Patient Disease Registers

- Set goals: what do we want to achieve as a practice team and how will we know when we've achieved it?
 - Set the goal + measurement + target date

Goal	Measurement	Target Date

Notes:



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

Goal	Measurement	Target Date

Notes:



Decision Making Worksheet: Section 2; Patient Disease Registers

Task	Decision to be made	Outcomes
Labeling diseases	<ul style="list-style-type: none"> What disease codes will the practice use? 	
Managing test results	<ul style="list-style-type: none"> How often pathology results are downloaded and collated 	
	<ul style="list-style-type: none"> The interval between receiving results, checking them for clinical significance and identifying patients who should be included in the register 	
Managing the registers	<ul style="list-style-type: none"> How often should the records be searched? How often should the register be updated? How to record the information (format, template etc.) 	
Reviewing the system	<ul style="list-style-type: none"> How often will the system be reviewed? 	
	<ul style="list-style-type: none"> 	
	<ul style="list-style-type: none"> 	



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

Task	Decision to be made	Outcomes
	▪	
	▪	
	▪	
	▪	
	▪	
	▪	
	▪	



Decision Making Worksheet: Section 2; Patient Disease Registers

Task	Decision to be made	Outcomes
	▪	
	▪	
	▪	
	▪	
	▪	
	▪	
	▪	



Written Procedure Worksheet: Section 2; Patient Disease Registers

- What are the tasks that need to be done and how will they be done?
- Who will perform these tasks?
- Who will be cross-trained (i.e. back-up)?
- What communication is needed; when and how?
- When will these elements be reviewed?

What to do and how to do it	Allocated to	Back-up	Communication	Review date



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

What to do and how to do it	Allocated to	Back-up	Communication	Review date



Written Procedure Worksheet: Section 2; Patient Disease Registers

- What are the tasks that need to be done and how will they be done?
- Who will perform these tasks?
- Who will be cross-trained (i.e. back-up)?
- What communication is needed; when and how?
- When will these elements be reviewed?

What to do and how to do it	Allocated to	Back-up	Communication	Review date



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

What to do and how to do it	Allocated to	Back-up	Communication	Review date



Written Procedure Worksheet: Section 2; Patient Disease Registers

- What are the tasks that need to be done and how will they be done?
- Who will perform these tasks?
- Who will be cross-trained (i.e. back-up)?
- What communication is needed; when and how?
- When will these elements be reviewed?

What to do and how to do it	Allocated to	Back-up	Communication	Review date



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

What to do and how to do it	Allocated to	Back-up	Communication	Review date



Written Procedure Worksheet: Section 2; Patient Disease Registers

- What are the tasks that need to be done and how will they be done?
- Who will perform these tasks?
- Who will be cross-trained (i.e. back-up)?
- What communication is needed; when and how?
- When will these elements be reviewed?

What to do and how to do it	Allocated to	Back-up	Communication	Review date



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

What to do and how to do it	Allocated to	Back-up	Communication	Review date

Instructions For Use Of Task Allocation Checklist

- The checklist can be used as both an *assessment of the current situation* in the practice and as a *decision-making tool*
- The following table is a sample row of the checklist

Task	Teamwork Roles	Role Conducted By								Process				Process Managed By							
		A		P		N		G		In Place		Written		A		P		N		G	
		○ C	□ D	○ C	□ D	○ C	□ D	○ C	□ D	○ C	□ D	○ C	□ D	○ C	□ D	○ C	□ D	○ C	□ D	○ C	□ D
	▪																				

- The columns for task and teamwork roles are completed with suggestions and there are also columns left blank for the practice team to complete with other tasks/roles as necessary
- The columns “Role Conducted By” and “Process Managed By” are coded as follows:
 - A: Administrative staff
 - P: Practice manager
 - N: Practice nurse
 - G: GP
- The aim is to work across each row and tick the relevant boxes within each section

1. Assessing the current situation in the practice

- The first square box of each headed column is coded “C” which stands for “Current”
 - Tick these boxes when assessing the current situation in the practice
 - Examples:
 - If a particular task is conducted by administrative staff, in the “Role Conducted By” column tick “C” circle under “A”
 - If there is a process in place but it is not written, in the “Process” column tick the “C” circle under “In Place” and “Yes”

2. Decision-making

- The second square box of each headed section is coded “D” which stands for “Decision”
 - Tick these boxes once a decision is reached on who will conduct a particular role and/or manage (take responsibility for) the overall process
 - Examples:
 - If the practice team decides that a particular task is to be conducted by the practice manager, in the “Role Conducted By” column, tick the “D” box under “P”
 - If the practice team decides that a process will be written, in the “Process” column, tick the “D” box under “Written” and “Yes”



Task Allocation Checklist For Section 2; Patient Disease Registers

- Tick the box/es appropriate for your practice (Codes: "A" for administrative staff; "P" for Practice Manager; "N" for nurse; "G" for GP)

Task	Teamwork Roles	Role Conducted By								Process				Process Managed By							
		A		P		N		G		In Place		Written		A		P		N		G	
		<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Compile Register	▪ Search patient records for patients with specified indicators	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Use Register	▪ Check for patients that require recall/reminder	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Update Register	▪ Record new data	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
	▪ Update indicators when necessary	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Reporting	▪ Patients who were not able to be contacted or who did not attend appointments	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
	▪ Responsible for follow-up or further action	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Current standards & guidelines	▪ Maintaining updated standards & guidelines	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
	▪ Informing practice team of any changes	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Staff training	▪ Identifying staff training needs	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
	▪ Arranging staff training	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>
Review	▪ Reviewing system and procedures regarding patient education & resources	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>



Communication Worksheet: Section 2; Patient Disease Registers

- How will we communicate with each other?
- What do we need to inform/discuss and when?
- What method of communication will we use?

What information needs to be communicated?	When	Who to who	Method of communication



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

What information needs to be communicated?	When	Who to who	Method of communication



Procedure Title:			
Procedure Number:		Effective Date:	
Purpose:			
Regulation Reference:			

Procedure



Review Schedule: Section 2; Patient Disease Registers

- Review procedure
- Review training needs
- Review written procedure
- Set new review date
- Is it working for the practice team?
- Who needs/wants up-skilling?
- Modify as necessary

Procedure	Review date	Modifications / Actions necessary	Date and outcomes	Review date



TEAMWORK RESEARCH STUDY; Enhancing The Role Of Non-GP Staff In Chronic Disease Management In General Practice

Procedure	Review date	Modifications / Actions necessary	Date and outcomes	Review date