

Practice Management Back to Basics

- WentWest -

Presented by:

Katrina Otto

Train IT Medical Pty Ltd

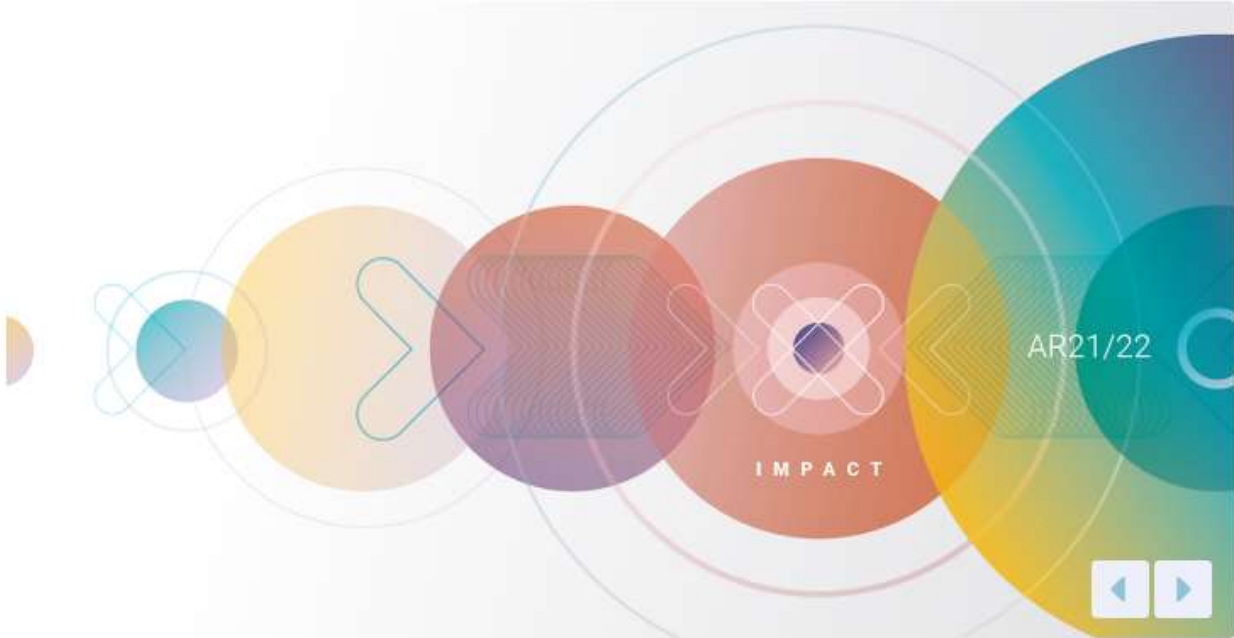
katrina@trainitmedical.com.au

www.trainitmedical.com.au



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support@wentwest.com.au | ph 8811 7117



Katrina Otto

**Bachelor's degree in Adult Education,
Diploma of Business, Health
Administration
Certificate IV Training & Assessment
Certificate – Social Welfare**

Managing Director, Train IT Medical Pty Ltd
Practice Management Consultant & Software Trainer
30 years experience in wide variety of medical
practices.
25 years experience as a TAFE teacher of medical
administration & practice management.

Approved trainer for Dept of Health, Best Practice,
Medical Director. Australian Digital Health Agency,
AAPM, APNA, RACGP, ACRRM, PEN CS, Polar,
Avant Mutual and others.



Access our webinars:

<https://courses.trainitmedical.com.au/>

Enrolment Code: WSPHN-2023

The screenshot shows a LinkedIn Learning course page for 'Western Sydney PHN - Webinars'. The page header includes the course title, 'Active 5 weeks ago', and 'Organizers: WentWest'. Below the header is a navigation bar with options: 'Feed', 'Documents', 'Send Messages', 'Courses', 'Send Invites', and 'Manage'. The main content area displays a grid of 12 course cards. Each card features a thumbnail image, a title, a subtitle, and completion progress. The cards are arranged in three rows and four columns. The first row includes 'WentWest Webinars by Train IT Medical...', 'Advanced Telehealth and Digital Health...', 'Telehealth for Specialists & Specialist Practice...', and 'Maximise Benefits of Digital Health Changes...'. The second row includes 'ePrescribing, Results and My Health Record for...', 'Electronic transfer of prescriptions using MedicalDirector Clinical', 'Electronic transfer of prescriptions using Bp Premier', and 'Leading Quality Improvements during Covid19'. The third row includes 'Cervical Screening Saves Lives!', 'Cervical Screening Saves Lives!', 'Immunisations - Who needs them?', and 'Immunisations - Who needs them?'. Each card also shows the completion percentage and the last activity date.





Learning Outcomes:

1. Define skills and attributes of the Practice Manager role.
2. Access information and support to build competence in the PM role.
3. Learn techniques to better manage staff and lead a high performing practice.



Learning Objective 1:

Define skills and attributes of the Practice Manager role.

Core Principles of Healthcare Practice Management:

1. Financial management
2. Human Resource Management
3. Planning and Marketing
4. Information Management
5. Risk Management
6. Governance and Organisational dynamics
7. Business and Clinical Operations



<https://www.aapm.org.au/>

<https://www.aapm.org.au/Your-Profession/Definition-of-a-Practice-Manager>



What are some other names for 'Practice Manager'?

“Quite clearly there are people doing the work of practice management, who are called something else such as:

- Practice Administrator
- Office Manager
- Business Manager
- Administrative Assistant or (often)
- Secretary/Receptionist.”

“It is the work that determines the role, not the title.”

aapm

Australian Association of
Practice Management

<https://www.aapm.org.au/>

Practice Management Fundamentals

1. Regulatory Framework & Compliance
2. Accreditation
3. Technology/Information Management
4. Human Resource Management
5. Financial Management
6. Business Planning
7. Marketing
8. Training
9. Continual quality improvements.





What's the difference between Skills and Attributes?

Think of a time when you've been in a challenging, stressful, or uncertain situation. How did you get through it?

It was most likely by leaning on your attributes, not your skills.

Understanding the difference between the two is a critical first step in optimizing your performance in challenging times.

Rich Diviney, Retired Navy Seal and Speaker for Optimal Performance

What skills do you need?

Skills are tangible, something you've learnt eg using your software

What attributes do you need?

Think qualities, traits eg patience, leadership



Half page excerpt from a 6-page Practice Manager job description:

- The Practice Manager is expected to have demonstrated achievement or capability in the following areas:

A broad understanding of the requirements of a small to medium business.

Ability to communicate verbally and in writing.

Time management skills and the ability to priorities tasks.

Leadership and team building experience.

Ability to devise and review systems for operational efficiency and control.

Computer management skills, including information security (computer backup).

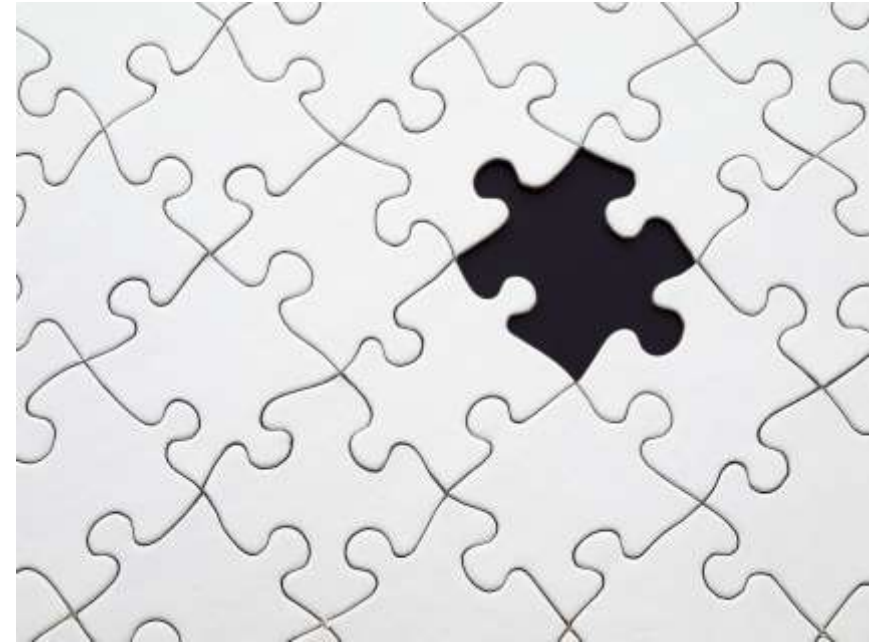
Skills in accounting and business reporting.

Knowledge of relevant legislation.

Knowledge of employment conditions.

Commitment to continuing education.

Decision making competence.

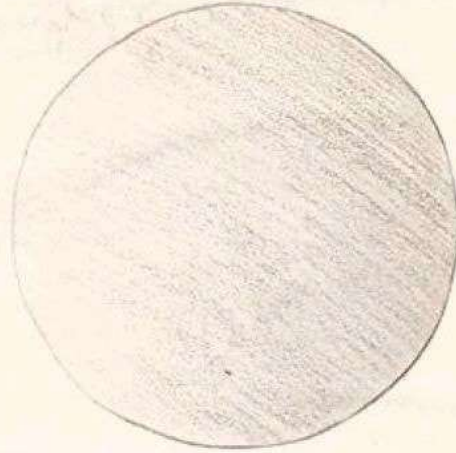


Patient Recall Window

Select Reasons

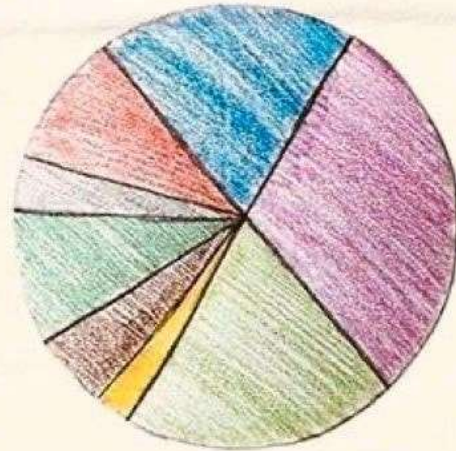
HEALTH ASSESSMENT OVER 75
HEALTH ASSESSMENT
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HEALTH ASSESSMENT OVER 75
HEALTH ASSESSMENT OVER 75
HEALTH ASSESSMENT 75 YEARS
HEALTH ASSESSMENT OVER 75
HEALTH ASSESSMENT OVER 75
HEALTH ASSESSMENT OVER 75
HEALTH ASSESSMENT OVER 75

What people **THINK** leadership is:



- Telling people what to do

What **LEADERSHIP** really is:



- Integrity
- Cast a vision
- Use of influence
- Use of power
- Praise your team
- Self-awareness
- Listen first and speak last
- Empathy

Business Planning:

Determine annual business goals in consultation with the Practice Principal(s).

- Develop and implement strategies for achievement of practice goals.
- Prepare budgets and business plans around the goals.
- Provide regular reports on business performance in relation to the budgets, business plans, and business goals.



Worksheet
SWOT Analysis



For instructions on using SWOT Analysis, visit www.mindtools.com/rs/SWOT.

| Strengths What do you do well? What unique resources can you draw on? What do others see as your strengths? | Weaknesses What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses? |
|--|--|
| | |
| Opportunities What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities? | Threats What threats could harm you? What is your competition doing? What threats do your weaknesses expose you to? |
| | |

www.mindtools.com/rs/SWOT



Personal SWOT Analysis Worksheet

- For instructions on using Personal SWOT Analysis, visit www.mindtools.com/personalswot.

| Strengths What do you do well? What unique resources can you draw on? What do others see as your strengths? | Weaknesses What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses? |
|--|--|
| | |
| Opportunities What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities? | Threats What threats could harm you? What is your competition doing? What threats do your weaknesses expose you to? |
| | |

https://www.mindtools.com/worksheets/Personal_SWOT_Analysis_Worksheet.pdf



Create the vision and build your TEAM

- Recruitment, development and management of non-clinical practice staff to ensure high performance and continuing professional improvement.
- Leadership and management including team building, delegation of tasks and conflict resolution.
- Administer payroll to ensure both employee and employer interests are protected, tax/superannuation obligations are met and records are maintained.



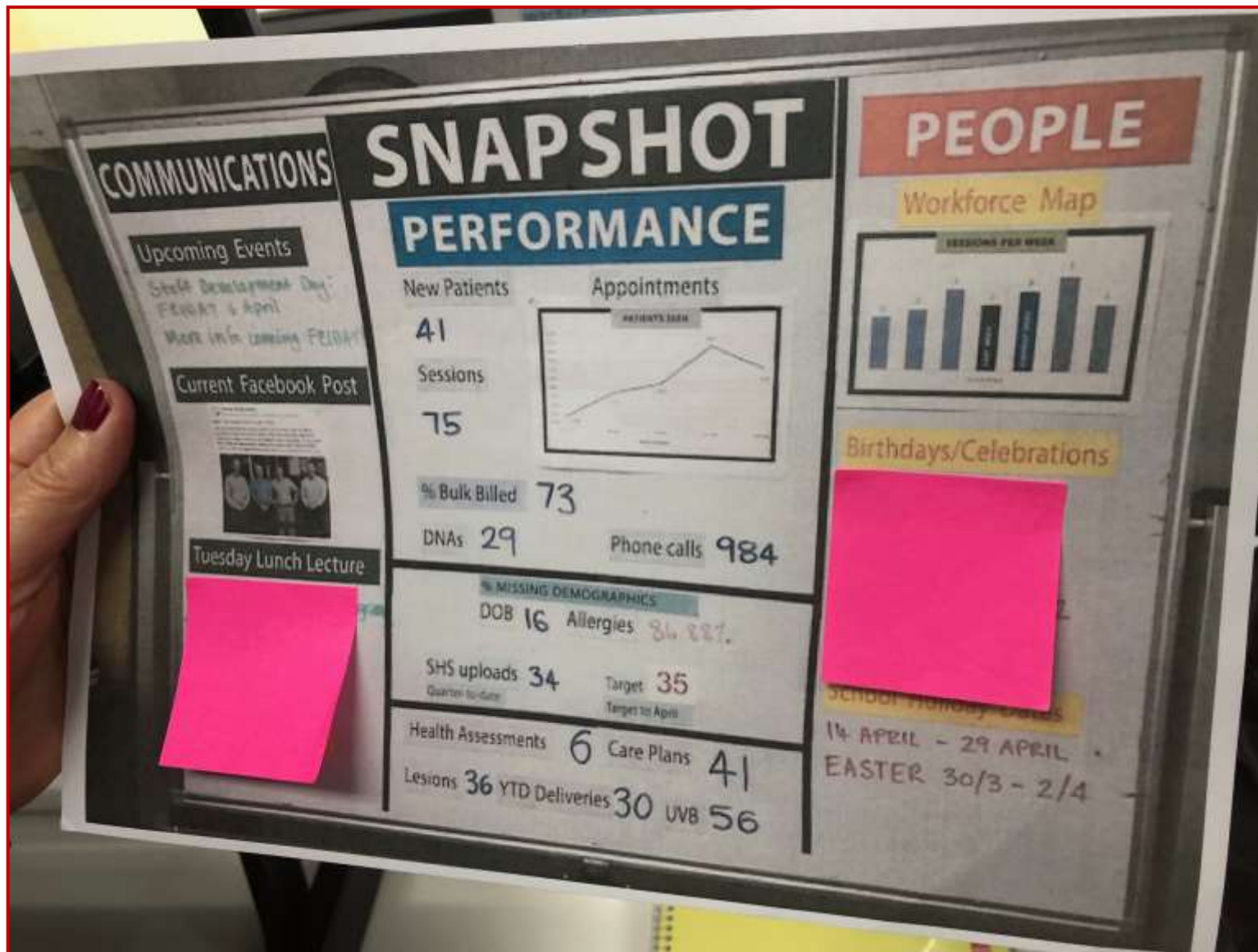




**“Change is the only constant in life.
One’s ability to adapt to those changes will
determine your success in life”.**

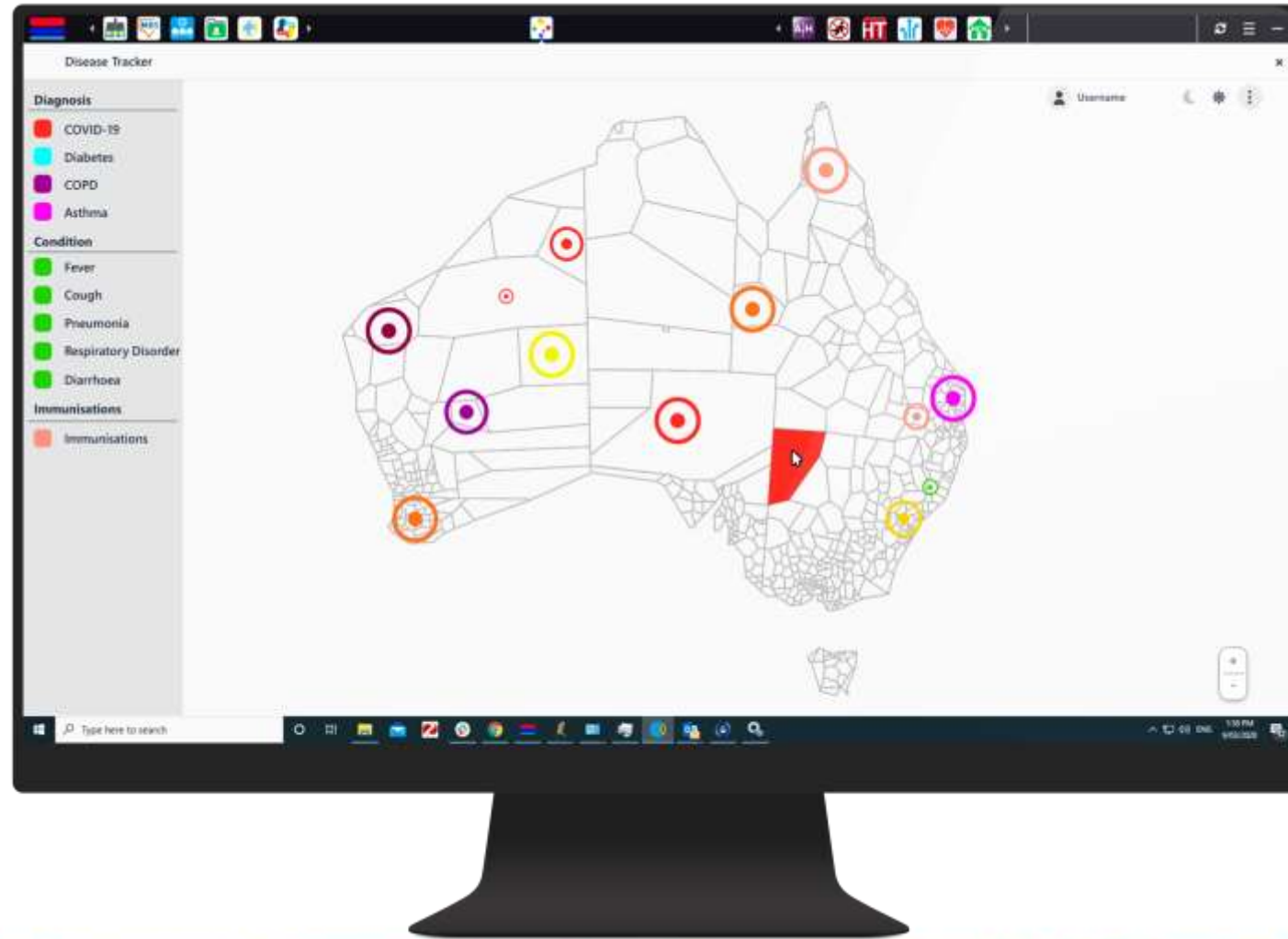
Benjamin Franklin





Example from rural WA

Create the Vision – why the data, why we do what we do



When caught early over

90% of those diagnosed
with bowel cancer

will beat it.



Data & Technology



Technology

- QR Codes
- Electronic forms
- ePrescribing
- Online appointments
- Telehealth
- Go Share
- Cubiko
- Pen CS
- Practice Intranets
- Practice Management Software



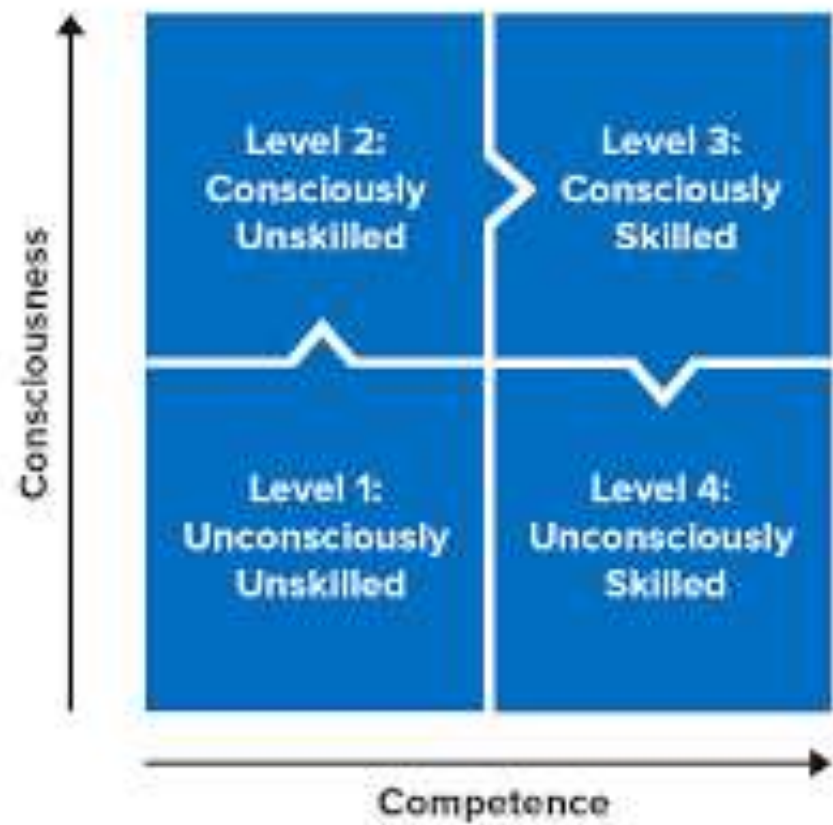
Driving technology efficiencies

QR Codes for

1. Patient consent forms
2. New patient registration forms
3. Patient feedback



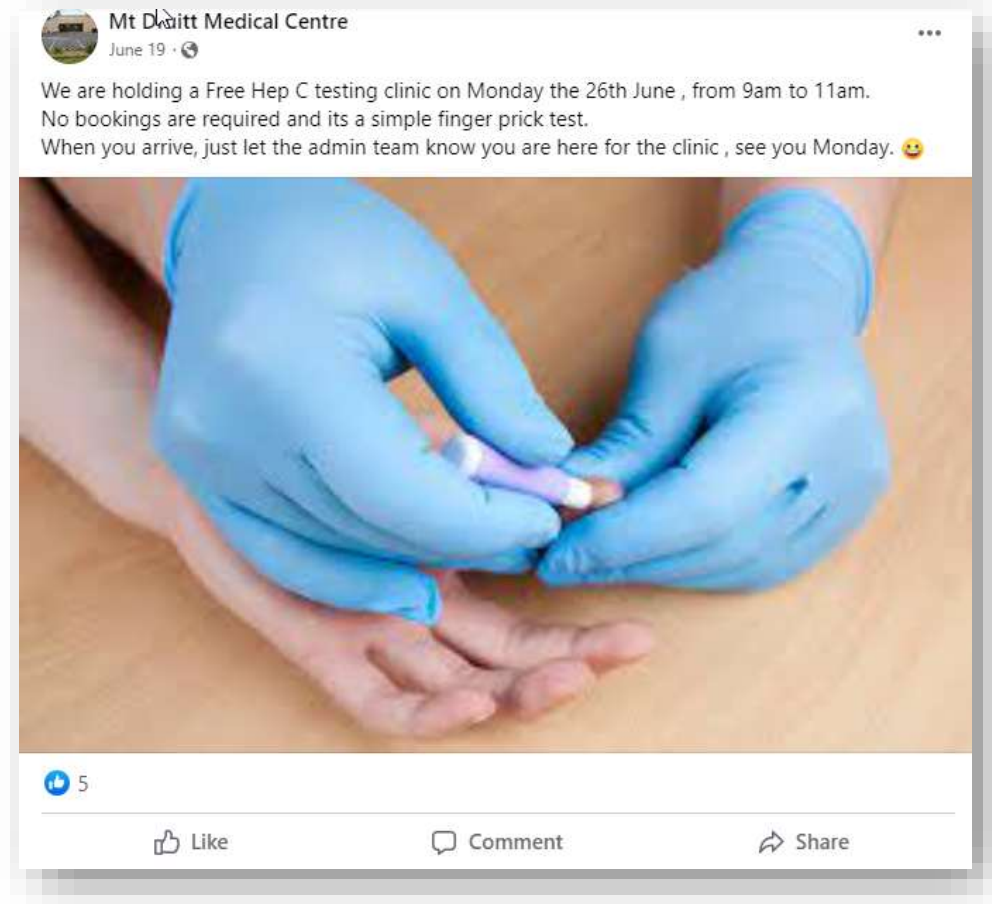
Training



Your Ongoing Learning Plan

Networking, Culture

& Marketing your practice



[RACGP Guide to marketing your practice](https://www.racgp.org.au/running-a-practice/practice-resources/practice-tools/general-practice-business-toolkit/general-practice-tool-kit/module-3/the-5-ps)

<https://www.racgp.org.au/running-a-practice/practice-resources/practice-tools/general-practice-business-toolkit/general-practice-tool-kit/module-3/the-5-ps>

Learning Objective 2:

Access information and support to build competence in the PM role.

General Practice Support



Quality Improvement in General Practice

Training & Education

Accreditation

Further Learning:

UNE - <https://unep.edu.au/short-courses/>

TAFE - <https://www.tafensw.edu.au/short-courses>

AAPM - <https://www.aapm.org.au/>

RACGP - <https://www.racgp.org.au/running-a-practice/practice-management>

RACGP Risk Management - <https://www.racgp.org.au/running-a-practice/practice-management/general-practice-governance/clinical-risk-management>

RACGP Practice Managers mailing list:

<https://www.racgp.org.au/running-a-practice/practice-resources/practice-tools/general-practice-business-toolkit/general-practice-tool-kit/subscribe-to-the-newsletter>

Diploma of Practice Management



What You'll Learn

- Manage practice operations and planning
- Manage and facilitate ethical and legal compliance
- Manage budgets and financial plans
- Manage billing and accounting systems
- Implement and monitor procedures and policies for infection control
- Manage staff performance and relationships effectively
- Implement and monitor work, health and safety processes, identify hazards and hazard assessment processes/procedures
- Understand legal and ethical considerations for health practice billing
- Understand legal and ethical frameworks to use in management for development and monitoring of policies and procedures



Duration Study Load

- Part-time: 19 months
- Full-time: 12 months
- Maximum 24 months

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Tools to Support Quality Improvement

Lumos: Lumos is a joint initiative between WentWest and NSW Health to help practices better understand their patient's journey across the health system. The program securely links encoded, de-identified data from general practices to other NSW health services. Building clearer patient profiles can lead to more data-driven quality improvement activities.

Pen CS Tools: Pen Computer System (CS) tools, such as the Pen Clinical Audit Tool (PenCAT) and Topbar, improve the accuracy of clinical data and improve clinical decision making across Quality Improvement areas. WentWest funds PenCAT and Topbar licenses from Pen CS for all practices in Western Sydney.

GoShare: GoShare is a digital patient education platform that allows health professionals to send tailored, trusted health resources to patients by email or SMS to help manage their medical conditions. GoShare can be used to distribute targeted information to patients that address specific MBS Quality Improvement areas, and the platform's overview reports measure against QI goals. WentWest has funded GoShare and GoShare Plus subscriptions for all Western Sydney general practices.

Health Intelligence Unit: WentWest's Health Intelligence Unit (HIU) provides trusted data insights that support, inform, and improve the health and wellbeing of the Western Sydney population. Our HIU is continuously supporting primary care transformation through data-driven quality improvement initiatives, risk stratification, predictive modelling, and structured QI reports.

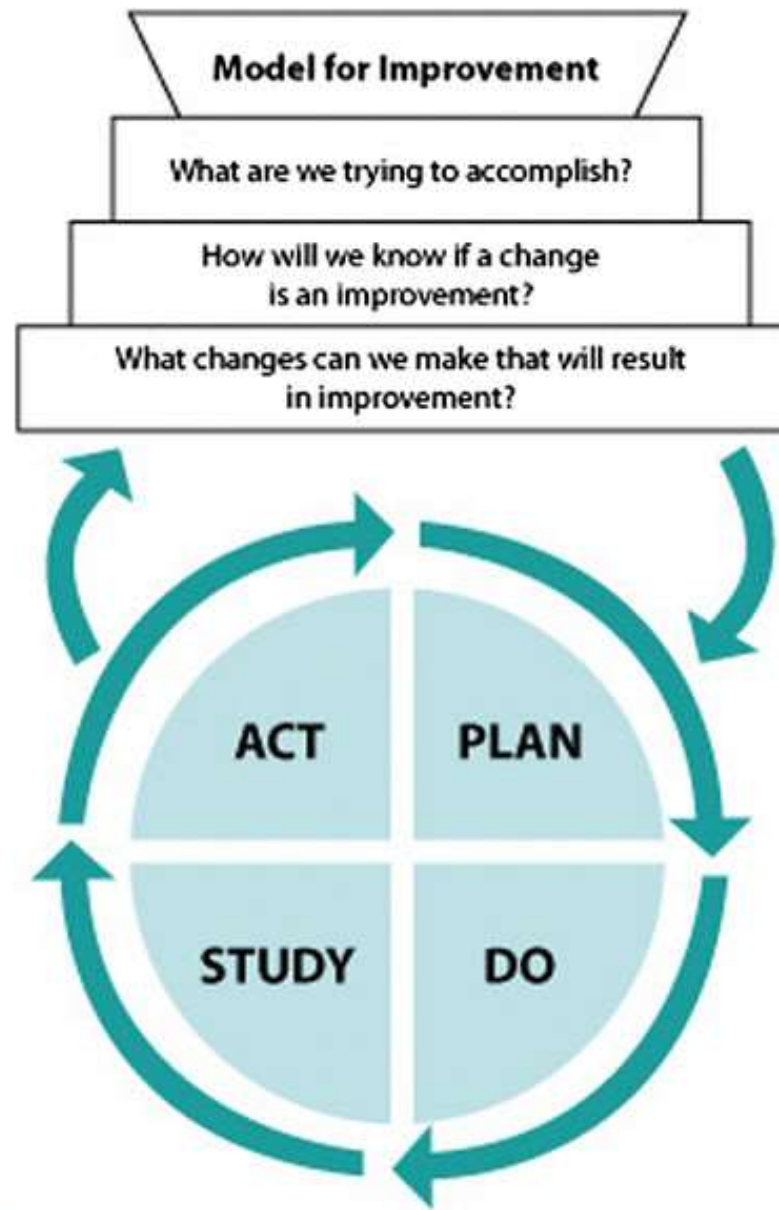
HealthPathways: Western Sydney HealthPathways provides relevant, up-to-date clinical information on managing patient medical conditions, as well as referral information for local services. This helps improve patient care.

To access HealthPathways, you will need the general login details. For more information, please contact our HealthPathways team at healthpathways@wentwest.com.au

For WSLHD and SCHN Staff, please access HealthPathways via the WSLHD/SCHN Intranet Applications page.

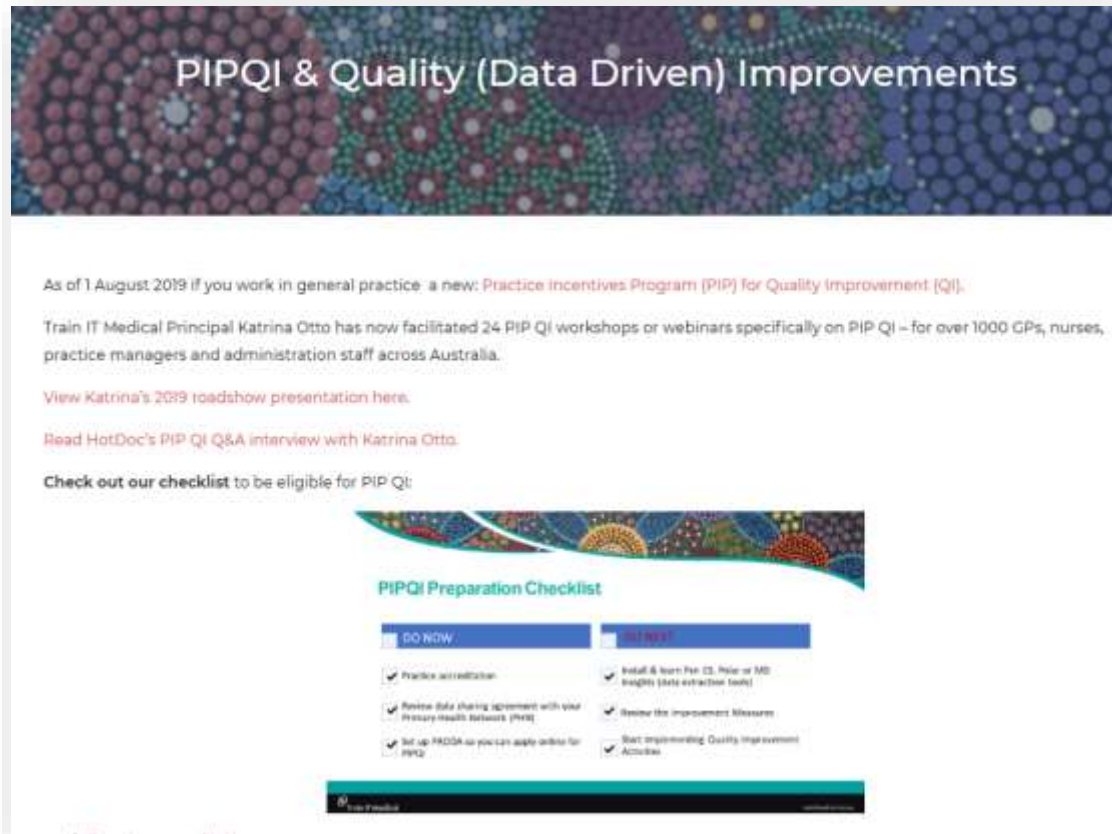
Additional digital health tools such as secure messaging, electronic prescriptions, electronic discharge summaries, My Health Record, Telehealth, and Pathology e-Requests contribute to general practice quality improvement. To find out more about the tools available to your practice, contact your WentWest Practice Development Team lead.

WentWest QI



Further learning:

www.trainitmedical.com.au



PIPQI & Quality (Data Driven) Improvements

As of 1 August 2019 if you work in general practice a new: [Practice Incentives Program \(PIP\) for Quality Improvement \(QI\)](#).

Train IT Medical Principal Katrina Otto has now facilitated 24 PIP QI workshops or webinars specifically on PIP QI – for over 1000 GPs, nurses, practice managers and administration staff across Australia.

[View Katrina's 2019 roadshow presentation here.](#)

[Read HotDoc's PIP QI Q&A interview with Katrina Otto.](#)

Check out our [checklist](#) to be eligible for PIP QI:

PIPQI Preparation Checklist

| DO NOW | NOT NOW |
|--|---|
| <input checked="" type="checkbox"/> Practice accreditation | <input checked="" type="checkbox"/> Install & learn how to use (or MD insights) data extraction tools |
| <input checked="" type="checkbox"/> Review data sharing agreement with your (primary health network) PHN | <input checked="" type="checkbox"/> Review the Improvement Measures |
| <input checked="" type="checkbox"/> Set up PIPQI so you can apply online for PIPQI | <input checked="" type="checkbox"/> Start implementing Quality Improvement Activities |



We share because we care

Over our years of presenting, training & consulting to medical practices, we have collated thousands of learning resources.

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Course Materials

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- WentWest Webinars by Train IT Medical... (0% Complete, 0/0 Steps)
- Advanced Telehealth and Digital Health... (0% Complete, Last activity on October 16, 2020)
- Telehealth for Specialists & Specialist Practice... (0% Complete, 0/1 Steps)
- Maximise Benefits of Digital Health Changes ... (0% Complete, 0/1 Steps)
- ePrescribing, Results and My Health Record for multidisciplinary care (100% Complete, Last activity on December 30, 2020)
- Electronic transfer of prescriptions using MedicalDirector Clinical (0% Complete, Last activity on November 12, 2020)
- Electronic transfer of prescriptions using Bp Premier (100% Complete, Last activity on January 7, 2021)
- Leading Quality Improvements during Covid19 (0% Complete, 0/1 Steps)
- Cervical Screening Saves Lives! (A systematic approach to prevention using Bp Premier) (100% Complete, Last activity on December 30, 2020)
- Cervical Screening Saves Lives! (A systematic approach to prevention using MedicalDirector Clinical) (100% Complete, Last activity on December 30, 2020)
- Immunisations - Who needs them? (Immunisation documentation using Bp Premier) (100% Complete, Last activity on December 30, 2020)
- Immunisations - Who needs them? (Immunisation documentation using MedicalDirector Clinical) (100% Complete, Last activity on December 30, 2020)



Learning Objective 3

Learn techniques to better manage staff and lead a high performing practice.



Consider skills and attributes needed to run effective meetings



Meetings & Business Planning

HERDING CATS:

"A futile attempt to control that which is inherently uncontrollable."



"IT TAKES ONE TO HERD ONE."

Meetings & Business Planning

Clear Form

COVID-19 Daily Management Plan



Day: Date:

| | |
|--|---|
| 1. Visit key websites for updates | |
| a. | www.wqphn.com.au/news-events/coronavirus |
| b. | https://www.qld.gov.au/health/conditions/health-alerts/coronavirus-covid-19/current-status/current-status-and-contact-tracing-alerts |
| c. | https://www.health.qld.gov.au/news-events/doh-media-releases |
| d. | https://www.health.gov.au/news/health-alerts/novel-coronavirus-2019-ncov-health-alert |
| Key points for discussion at team meeting: | |
| <ul style="list-style-type: none"> • <input type="text"/> • <input type="text"/> • <input type="text"/> • <input type="text"/> • <input type="text"/> | |
| 2. Daily Team Meeting: | |
| Attendance: | <input type="text"/> |
| Actions from yesterday's meeting: | <input type="text"/> |
| What's changed since yesterday: | <input type="text"/> |
| What's on today: | <input type="text"/> |
| Issues, concerns, or WHS risks raised: | <input type="text"/> |
| Improvement suggestions (CQI): | <input type="text"/> |
| 3. | Update whiteboards, notice boards, and communication books with any new information |
| 4. | Ensure all PPE stocks are replenished, including hand sanitiser and soap dispensers |
| 5. | Review appointment book to ensure all telehealth bookings include all necessary details |
| 6. | Wipe down the waiting room chairs and reception surfaces with disinfectant wipes at lunch time and any other time as required following infection control standards |
| 7. | Check pathology and PPE stocks and reorder as necessary |
| 8. | Check in with staff members on their mental health and wellbeing |
| | Are you OK? If not, to follow up |
| | Are you using the appropriate infection control techniques and staff PPE? |
| | Are there any practice issues or concerns? If yes, to follow up |
| 9. | Today's good news story: <input type="text"/> |
| 10. | Provide feedback to your PHN coordinator on any good news stories, issues, or concerns |



Lead with evidence

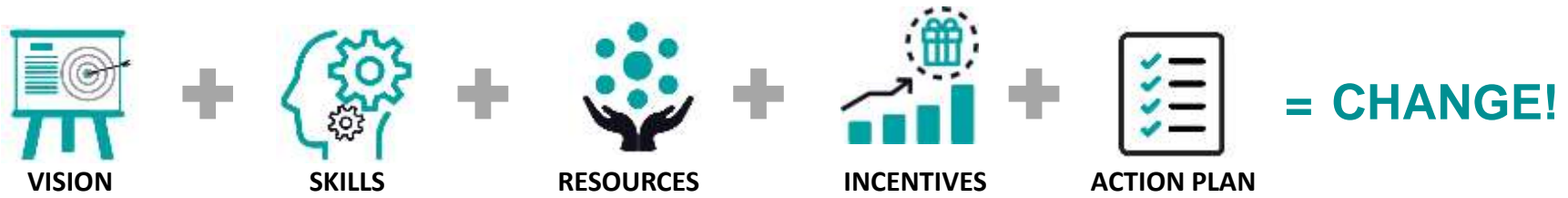
PIP QI 10 Measures

Alan Abbott, 48 yrs, M

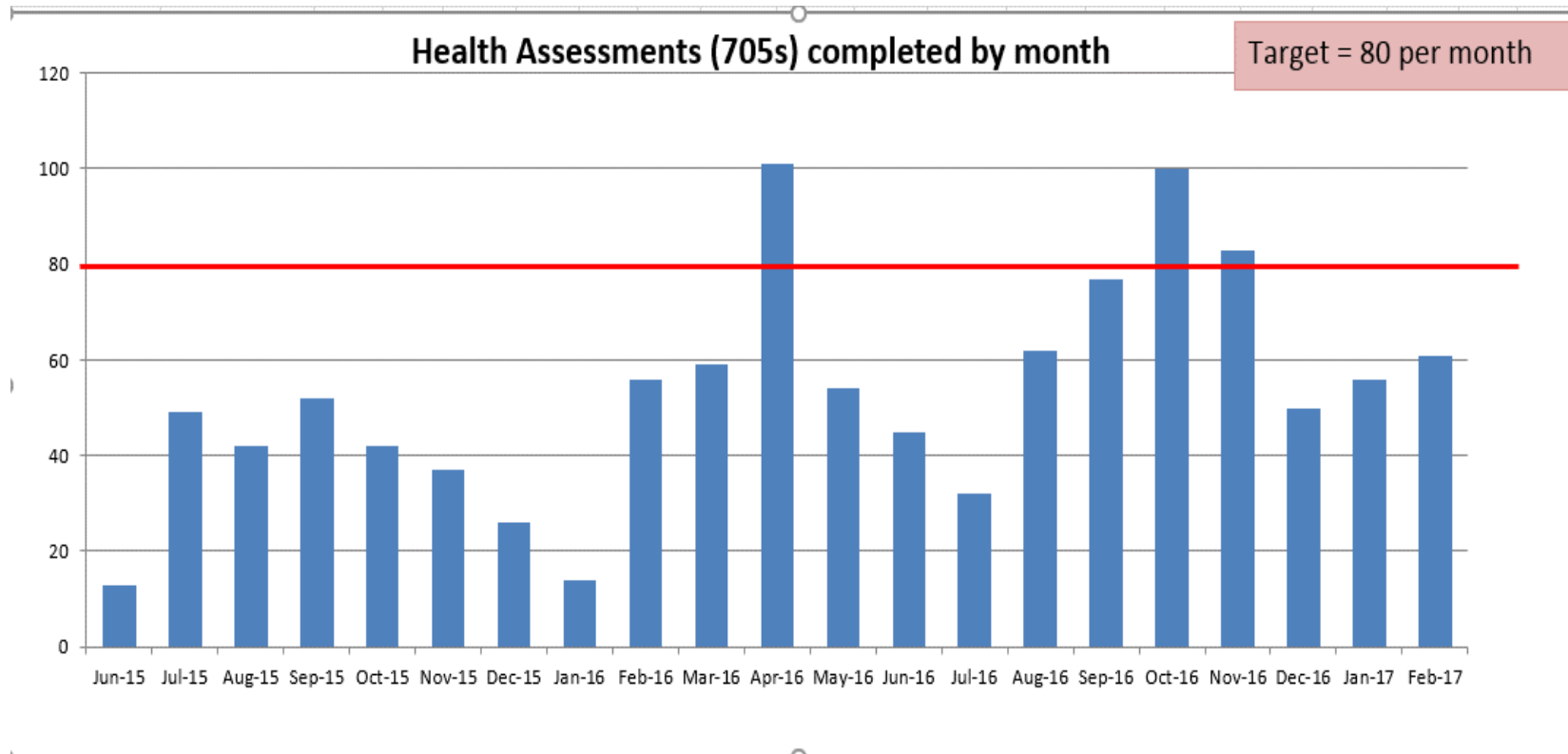
20%

1. Patient with Type 1 or Type 2 Diabetes, and a HbA1c result recorded within the last 12 months
Missing
2. Smoking status recorded in the last 12 months (age 15+yo)
Missing
3. BMI recorded in the last 12 months (age 15+yo)
Missing
4. Patient aged 65 and over, and Immunized for Influenza in the last 15 months
This patient does not meet the eligible criteria.
5. Patient with Diabetes, and Immunized for Influenza in the last 15 months
Missing
6. Patient with COPD, and Immunized for Influenza in the last 15 months (age 15+yo)
Missing
7. Alcohol consumption recorded (age 15+yo)
Missing
8. CVD Risk Factors recorded (45-74yo)
 - Smoking Status: **Missing**
 - Diabetes Diagnosis: **Type 2 Diabetes**
 - Systolic Blood Pressure: **120/90mmHg (13 Nov 2018)**
 - Cholesterol: **Missing**
 - HDL: **Missing**
 - Age: **48**
 - Gender: **Male**
9. Female patient, with a Cervical Screening recorded in the last 5 years (age 25-74yo)
This patient does not meet the eligible criteria.
10. Patient with Diabetes, and with Blood Pressure recorded in the last 6 months
Missing
Previous: 120/90mmHg


Understand Change Management

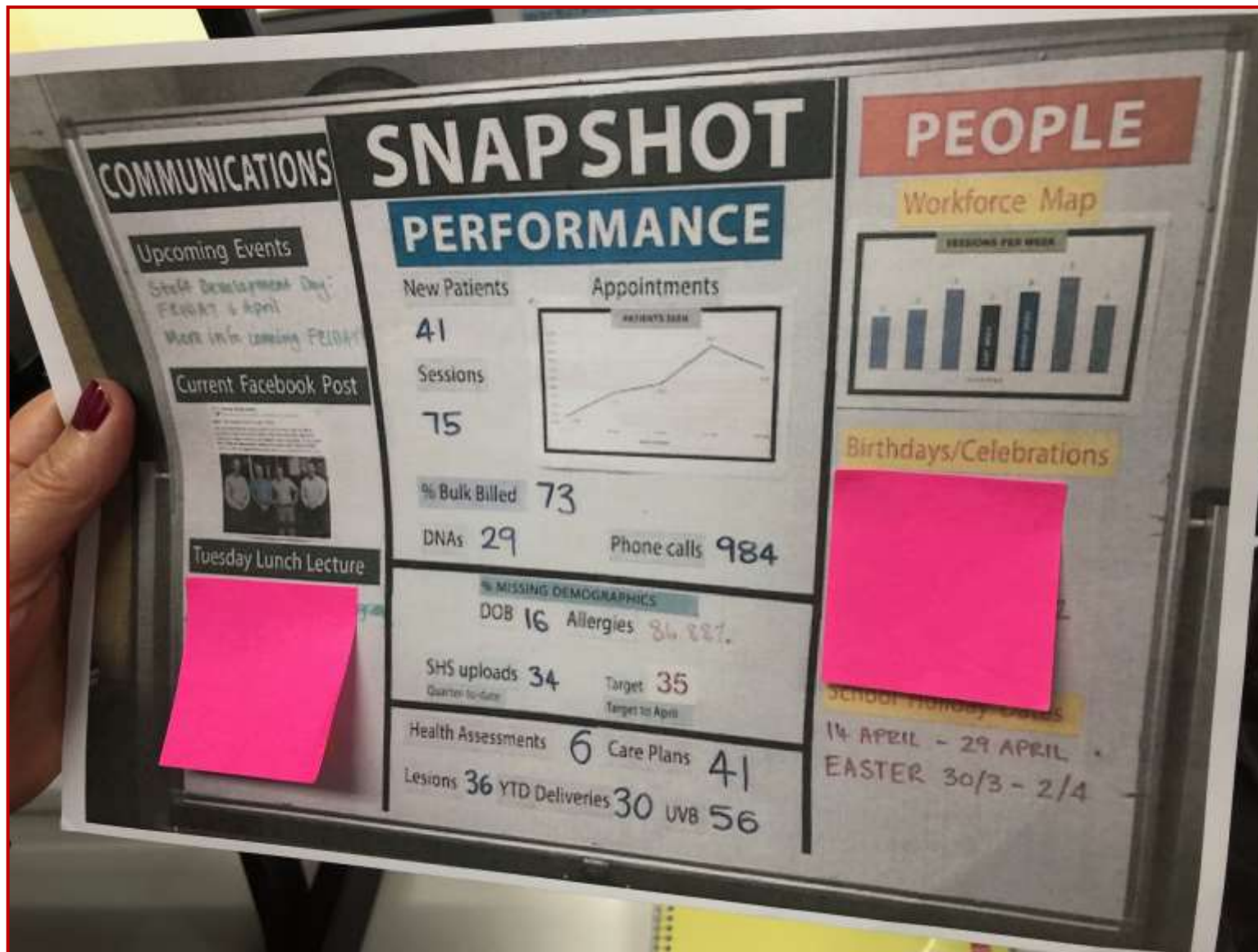


Your KPIs – track performance



Tips: Encourage a team effort to achieve the goals by setting a target on the graph & place graph in the staff room/noticeboard to encourage a proactive approach.

- 
1. Create a culture of quality
 2. **Clear constant communication**
 3. Lead with positivity



Example from rural WA

Empower your team to act on the vision & delegate



PDSA station



Example from Leschenault Medical Centre, WA



CKD Quality Improvement Activity /PDSA - Sample



I

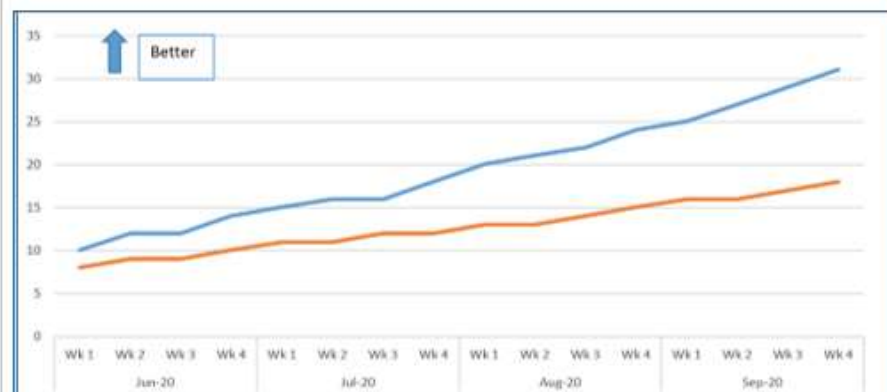
+

1. What is our goal?

Improve the ongoing management of patients with chronic kidney disease (CKD) through a patient centred, team-based approach.

2. How will we measure our progress?

1. Identify regular patients in with uncoded kidney disease...
2. Increase the number of patients with kidney disease who have a management plan.....



Next steps:



- Build a register of patients with kidney disease (look for indicated diagnosis).
-

Team members

Data collection/reporting:
Updating data in Bp:

1. How big a problem is this?
2. How do you measure?
3. How do you improve?
4. How do you lead improvement?



| PDSAs | | | WINS / Good news | | |
|----------------------------|--|-------------------|--|---|--|
| AREA | FOCUS | By WHEN | | | |
| Admin | Allocating patients to 'usual' GP in BP software | ongoing | Happy Or Not 88%  | | |
| Clinical | CKD GPM/PCA template review | End of October | Ethnicity 88% recorded | | |
| | | | Uncoded diagnoses - down to 3% | | |
| | | | MyHR:  495 SHS uploaded (May/June/July) | | |
| | | | New patients this month: 140 | | |
| Chronic Disease Management | | | WHAT | | |
| DM | with HbA1c in past 12/12 | June 88% July 89% | We are part of the Urgent Care Clinic Pilot (Phase 1) | | |
| COPD | with spirometry | June 7% July 6% | 1 st info session Feb 23/7 - Candice, Tommy, Jackie attending | | |
| CKD | Diabetics coded & CKD | 9 | CP Urgent Care Skills Workshop SAT 30 th November Candice & Fawcett, Ken, Chris | | |
| CHD | 120pts; Smoking status | 99%, BP 98% | | | |
| PREVENTATIVE HEALTH | | | IMPROVEMENT OPPORTUNITIES | | |
| 75+ HAx | June | 11 | July | 6 | Waist circ. 18% |
| 45-49 HAx | June | 0 | July | 1 | Hmmr 373 pts have 2 or more chronic conditions and are on >5 medications |
| CV RISK (Item 699) | June | 0 | July | 0 | Record all spirometry in Best Practice Software (can't not just scanned) |
| Hmmr | June | 1 | July | 1 | |

Example from Leschenault Medical, Bunbury, WA

Engage your team

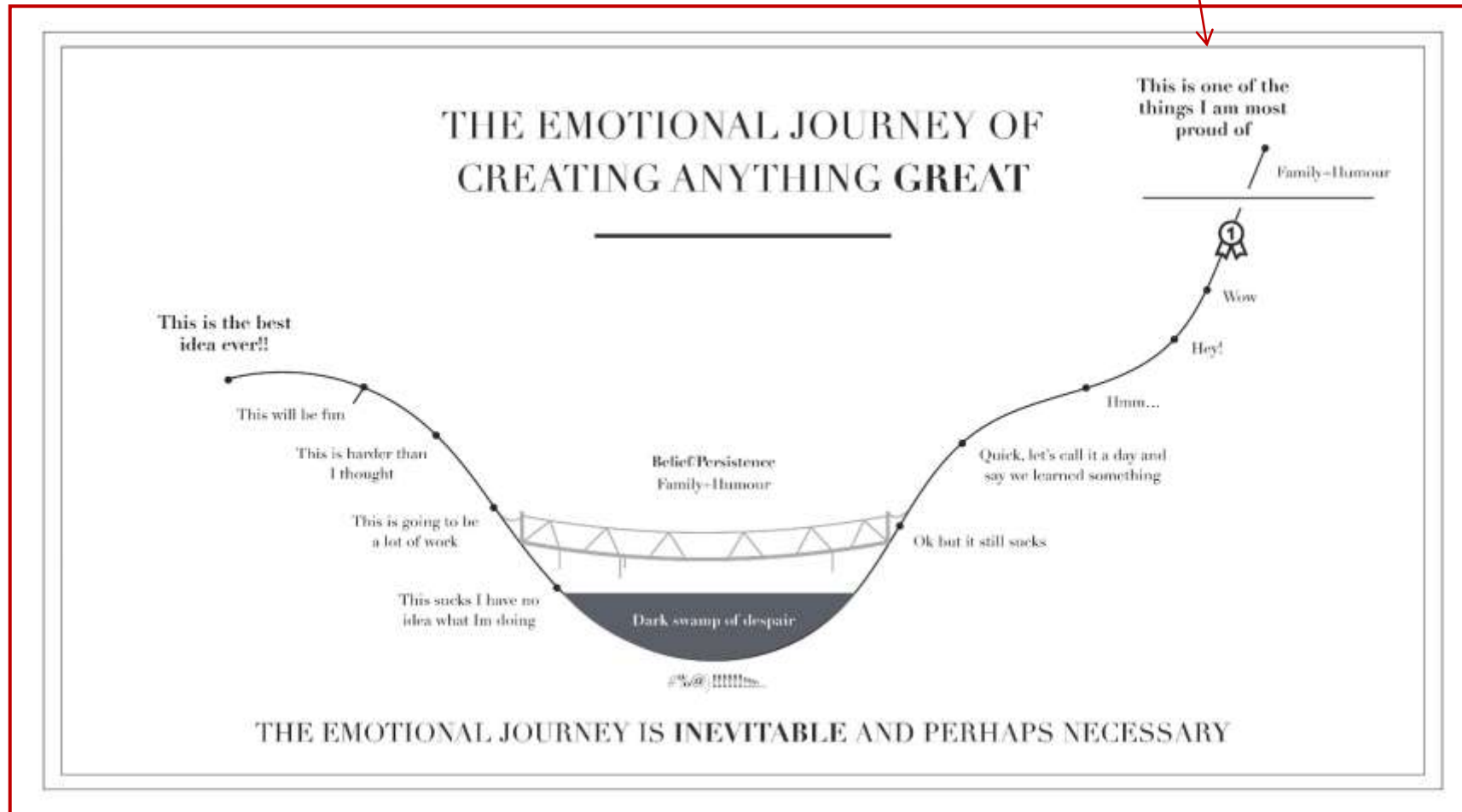


Consolidate improvements and lead continual change



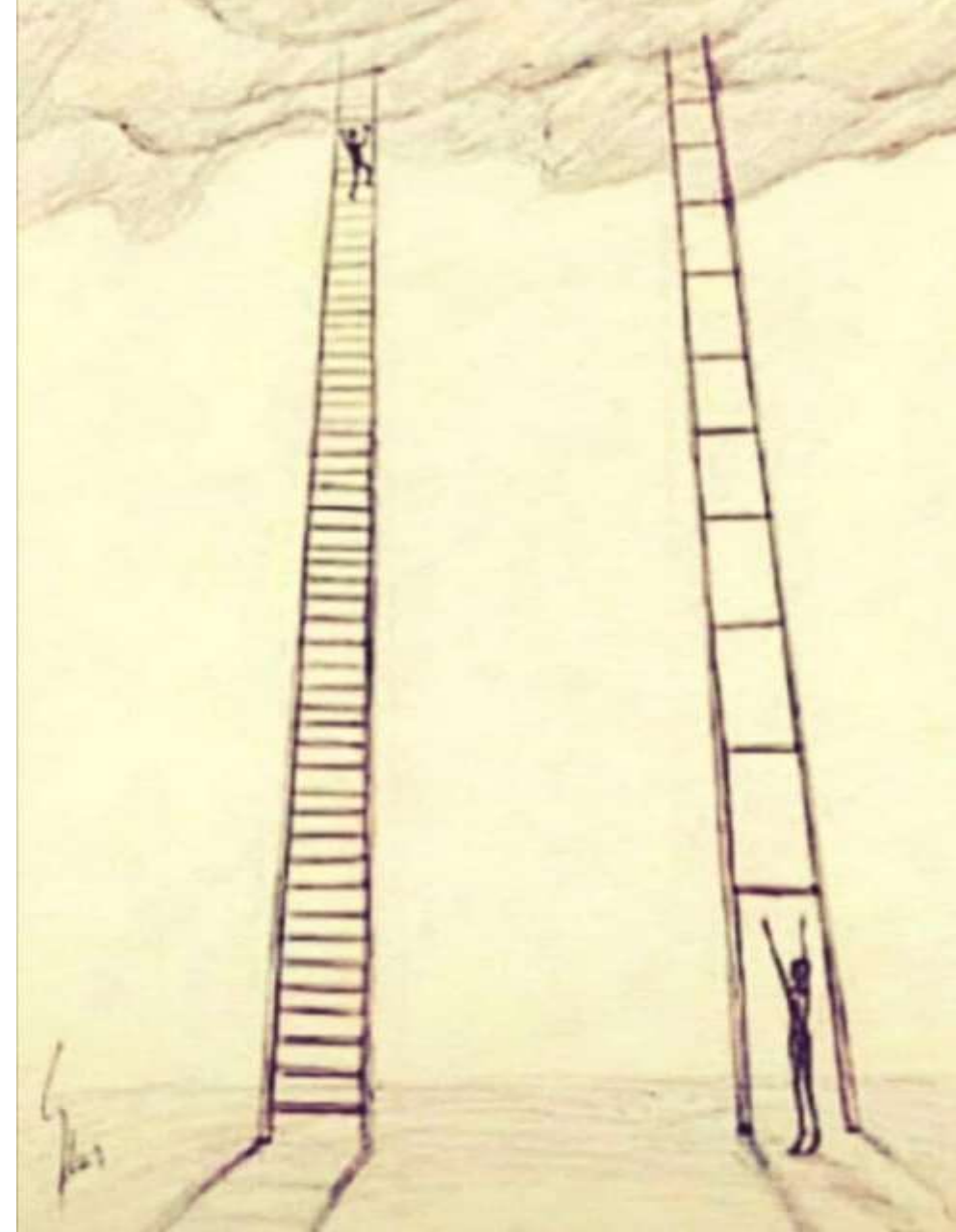
Leading change

Celebrate your success!



Katrina's tips for a successful, happy practice of the future:

1. Set small achievable goals
2. Document and review improvement activities
3. Train all staff on technology
4. Collaborate and train new processes
5. Adopt an infinite mindset
6. Create a team spirit
7. Monitor and communicate performance
8. Celebrate progress – no matter how small



Celebrate each improvement



Improve
health
outcomes

Improve
revenue

Improve
relationships

Improve
data

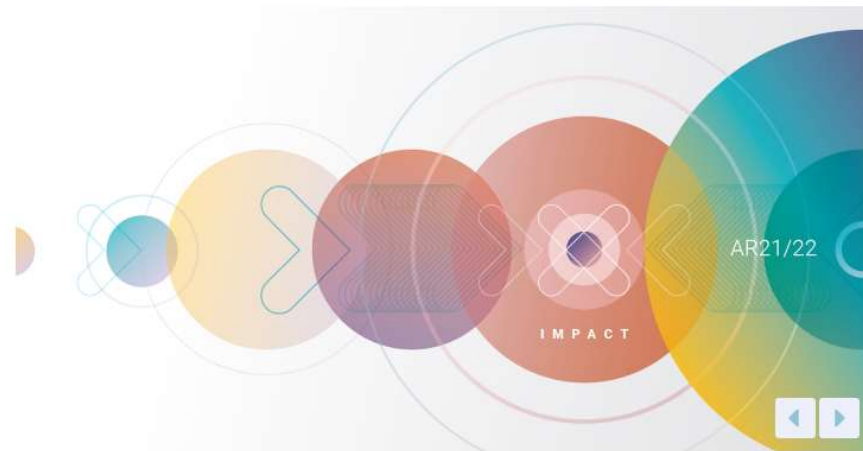
PRACTICE DEVELOPMENT & QUALITY IMPROVEMENT FRAMEWORK

We are committed to working with primary care and key partners to achieve our vision of healthier communities, empowered individuals and a sustainable primary health care workforce and system.



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Keep up-to-date with the latest health information on COVID-19



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support@wentwest.com.au





Train IT Medical

Leading your practice into a digital future

**STAY POSITIVE.
STAY FOCUSED.
STAY STRONG.**

katrina@trainitmedical.com.au

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