



Practice Management Beyond the 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.

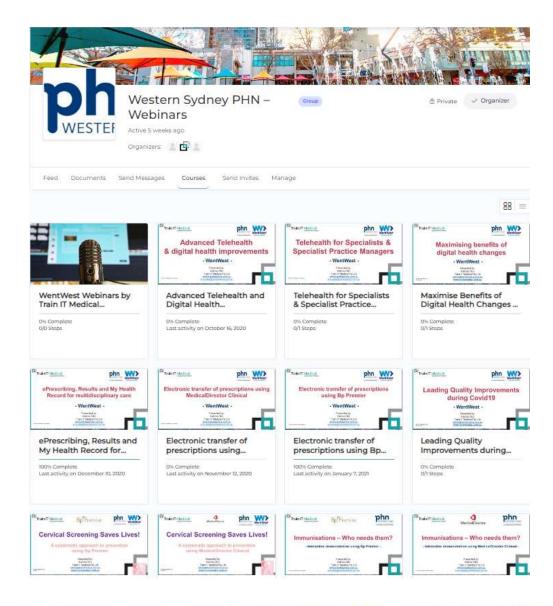
Approved trainer for Dept of Health, Best Practice, Medical Director. Australian Digital Health Agency, AAPM, APNA, RACGP, ACRRM, PEN CS, Polar, Avant Mutual and others.



Access our webinars:

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Core Principles of Healthcare Practice Management:

- 1. Financial management
- 2. Human Resource Management
- 3. Planning and Marketing
- 4. Information Management
- 5. Risk Management

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- 6. Governance and Organisational dynamics
- 7. Business and Clinical Operations





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

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

Learning Outcomes:

- 1. Understand Audit & Compliance Processes.
- 2. Increase use of digital technologies for automating processes.
- 3. Improve communication with providers, patients & staff.
- 4. Discuss strategies for conflict management.
- 5. Explore ideas for optimising business and patient care opportunities.

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Understand Audit & Compliance Processes.



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Audit and Compliance Processes

Audits are essential for ensuring quality of care and adherence to regulations.

An audit is a systematic and independent examination of practice processes, protocols and outcomes to determine whether they conform to established standards, guidelines and regulations.

- Regulatory Audit
- Accreditation Audit
- Clinical Audit
- Financial Audit



Compliance Processes

Compliance processes involve:

- ongoing monitoring
- training
- documentation

With corrective action to address any identified non-compliance issues and improve practice performance.

5th Standards for general practices



RACGP – Standards for General Practice (5th Edition)



RACGP – Standards for General Practice (5th Ed) Resource Guide

RACGP Compliance Checklist

When considering hardware and software for your practice, you need to consider f what you are purchasing complies with a range of legislative and professional equirements. This will ensure your practice provides high quality, safe and effective care to your patients. You should comply with the following.

Australian Privacy Principles	For more detailed information on the Australian Privacy Principles, refer to the Australian Government Office of the Australian Information Commissioner at www.oaic.gov.au/privacy/privacy-act/ australian-privacy-principles			
	For information on privacy in general practice, refer to the RACGP's Digital Business Kits Topic 3.2 at www.racgp.org.au/digital- business-kit/privacy/			
RACGP accreditation standards and resources, including:	Computer and information security standards (4th edition) is available at http://www.raogo.org.au/you-practice/standards/ computer-and-information-security-standards/			
 Computer and information security standards (4th edition) 	Standards for general practices (4th edition) is available at			
• Standards for general practices (4th edition)	www.racgp.org.au/your-practica/standards/standards4thed3ion/			
Ethical and legal requirements, including:	AMA code of ethics is available at https://ama.com.au/sites/ default/liles/documents/AMA_Code_of_Ethics_2004_Editorialy_ Revised_2006.pdf			
 Australian Medical Association (AMA) code of ethics 	AHPRA code of conduct for registered health practitioners is available at www.shpra.cov.au/			
 Australian Health Practitioner Regulation Agency (AHPRA) code of conduct for registered health practitioners 	Health Insurance Act 1973 is available at www.comiaw.gov.ac/ Senes/C2004Ac0101			
Health Insurance Act 1973				
Government programs, including:	Medicare www.humanservices.gov.nu/customer/dhs/medicare			
Medicare	Healthcare Identifiers Service is available at			
National eHealth requirements, including:	www.humanservices.gov.au/customer/services/medicare/ healthcare-identifiers-service			
 Healthcare Identifiers Service National eHealth record system 				

Compliance in general practice checklist Date of completion Nariw of practice When partnesing hardware and ephware for our practice we have made thicks to ensure that pools purchased correly with a range of legislative and professional requestments. We have also contacted our medical defense organization for hether gustance and covaulted with an IT protessional. Divoks here been matte to comply with Australian Privacy Privaces RACGP acceditation standards and resources, including Computer and Antomation Security Standards (4th editor)) Standards for Clemenal Phatology (RP) address Ethical and legal requirements AMA code of attrice AHETSA costs of conduct for registered health practitioners The Aveilte Insurance Aut 1070 Government programs Muchcare National arrivable requirements, its tuding: Healthcare identifiers Denvice · National al-kosth restard avelore Notes

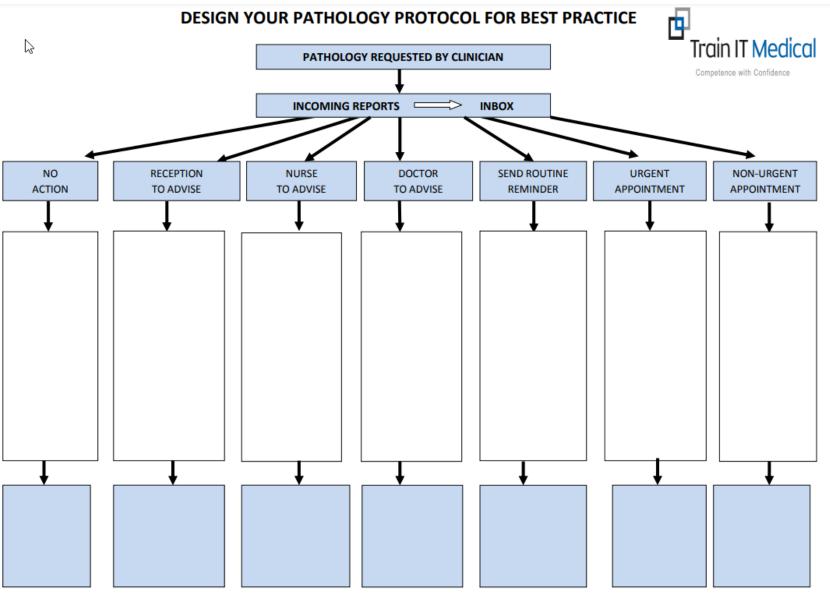
RACEP Designation

Page 2

Activity: What are 10 tools to help you manage risk?

- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.-

https://www.practiceassist.com.au/PracticeAssist/media/ResourceLibrary/General%20Practice%20Accreditation/Clinical-Risk-Management-System-Template-V1-200910-Editable.pdf



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Sample flowchart to be used as a team worksheet to assist in the design of suitable individual practice protocols

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Date

12 ways to Assess Risk

General Practice Clinical Risk Management System

Practice name:

The Royal Australian College of General Practitioners (RACGP) Standards for peneral practices, SH edition, indicators state:

QBLM.- Our practice monitors, identifies, and reports real missee and adverse events in clinical care.
 C3.10 - Our practice hear makes improvements to sur clinical risk management systems in order to prevent team missee management systems in order to

The sim of this policy is to accomplish the requirements of the above indicators and provide a systematic decision-making process to officiently plan, assess, handle, monitor and document clinical real. This will enable any practice traduce address tablet incident and deliver connected quality care.

Dissical risk management is defined as the act of identifying perceived risks in medical practices, establishing the extent of the potential risk, placency possible netpenses to reduce an elementate the risk and meintaining or evaluating the risk management process for continuous representent.

Our practice's clinical rive management system is the responsibility of the following staff member:

This person will call on other staff members and subject matter experts to contribute to the practice's clinical net management strategies.

Our practice vortures a culture of open communication to identify, monitor and vetuce clinical lisk. All staff are encouraged to report mistakes or near misses and make suggestions to improve clinical risk management.

Closed risk management is a stending agenda flam at our practice staff meetings, klentified risks are recorded in the risk register for further consideration to develop strategies to induce or eliminate the risk.

All staff will be made weare of the clinical risk management system as piet of their induction.

Defining mistakes and near misses

- Mistakes are errors or adverse events that result in harm.
- + Near misses are incidents that did not cause harm but could have

Potential clinical risk areas

Clinical knowledge and skill

Potential clinical risks can be the result of

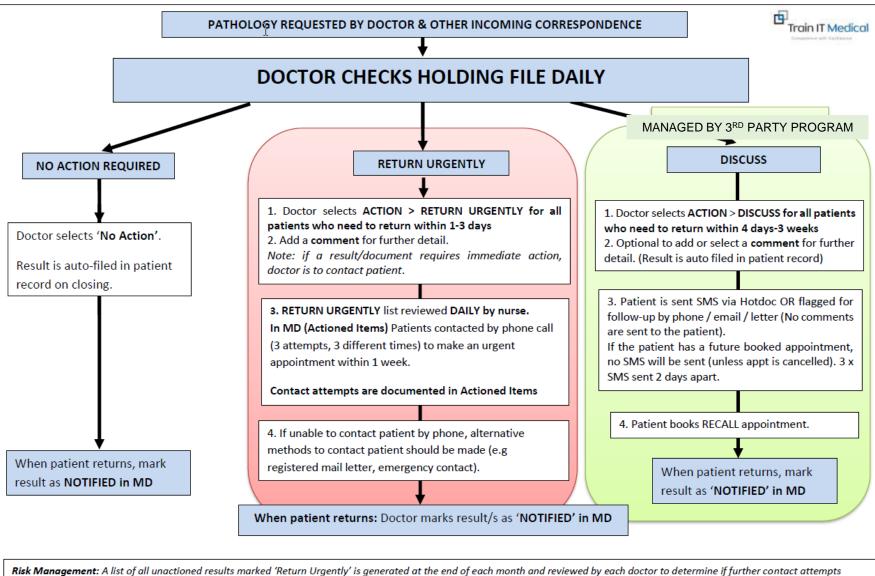
- not keeping up to date
 mot taking a thorough history and not conducting a thorough examination
- not documenting throughly in the patient's health record
- not being awars of personal limitations and retening patients on appropriately
 not investigating further if treatment and working
- not investigating further if matmant working
 not making use of protocals, checklish and diagnostic support aids
- not providing and-care
- not preventing and dealing with fullgue
- not reporting concerns when unsafe work practices are in place.

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- 1. Checklists.
- 2. Flow charts.
- 3. Subject matter expertise.
- 4. Surveys.
- 5. Incident analysis.
- 6. Brainstorming.
- 7. Audit processes.
- 8. Data trends.
- 9. Functional/failure analysis.
- 10. Patient feedback.
- 11. Staff feedback.
- 12. Staff performance reviews.

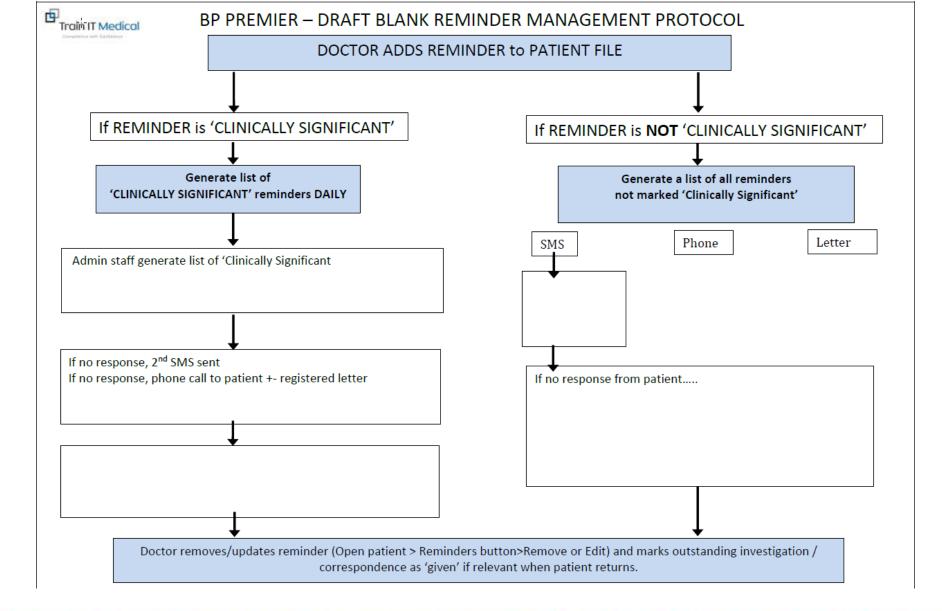
https://www.practiceassist.com.au/PracticeAssist/media/ResourceLibrary/General%20Practice%20Accreditation/Clinical-Risk-Management-System-Template-V1-200910-Editable.pd f

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needed or to remove the result from the follow up list by changing notation to 'Discuss' and adding explanatory comments.

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Data and Privacy Compliance

Information to be included	Yes/No	Comments
What a data breach is and how staff can identify one		
Clear escalation procedures and reporting lines for suspected data breaches		
Members of the data breach response team, including roles, reporting lines and responsibilities		
Details of any external expertise that should be engaged in particular circumstances		
How the plan will apply to various types of data breaches and varying risk profiles with consideration of possible remedial actions		
An approach for conducting assessments		
Processes that outline when and how individuals are notified		
Circumstances in which law enforcement, regulators (such as the OAIC), or other entities may need to be contacted		
Processes for responding to incidents that involve another entity		
A record-keeping policy to ensure that breaches are documented		
Requirements under agreements with third parties such as insurance policies or service agreements		
A strategy identifying and addressing any weaknesses in data handling that contributed to the breach		
Regular reviewing and testing of the plan		
A system for a post-breach review and assessment of the data breach response and the effectiveness of the data breach response plan		

Independent Practice Assessment

ફ્લુstem/Process Name	Who is responsible?	Documented Process?	Documented policy?	Metric
Appointment Book				
Appointment Booking process				
Walk in process				Average wait times
Appointment reminders				% of appointments with reminders sent
Appointment Attendance				DNA rate
Waiting list management			7	No of patients in waiting list, length of time on list
Appointment book management				Completed appointments rate
Billing processes				
OPV check				No. of Medicare rejections per day
Finalise Billing				No of uncompleted appointments per day
Institutional Billing				Outstanding debt - third party
Day sheets - billing verification process				100% reports verified each day
End of day protocol				
IHI verification - bulk				Bulk verification process completed each day
Patient item no. eligibility check				No of 10997's and 10998's claimed each month
Aboriginal Health Payments				Proportion of total patients calimed in last 12 months
Other				
New patient registration				No. of new patients registered per month
Archiving inactive / deceased patients				Total number of active patients
PIP registrations				% of patients registered for PIP, registrations per month
Correspondence Management				No. of outstanding overdue recalls (urgent and non-urger
Reminder Management				No. of overdue reminders
Duplicate patients				No. of duplicate patients - report
Faxing/scanning processes				No. of outstanding documents to be scanned
ePIP - SHS Uploads				No of SHS uploads per PIP quarter/per clinician
eScripts				No of eScripts generated per month
T = = = = + -				Descention of the laborable communities and from a second

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RACGP Accreditation Standards

	RACGP requirement	
Allergies/Adverse Reactions	90%	
Ethnicity/Cultural background	75%	
Current Medications	75%	
Past Medical History	75%	
Family & Social History	75%	
Risk Factors	75%	
(smoking, nutrition, alcohol, physical act	tivity)	
Clinical Coding	ALL	

Clinical Audit Tool

Data Quality Dashboard D	ata Completeness Report	Data Completeness Patient Graph	Duplicate Numbe	r Patient Report Duplicat
	🕨 🗧 🛞 🚱 🖶	a 🔲 🔍 🔍 - 100%	-	Find Next
Data Quality Dash	nboard	Repo	ort Date: 12/	02/2015 9:57 AM
		Practice I	Name: Deid	entified Practice
Data is taken from the D	ata Completeness Rep	oort and Duplicate Patients Rep	ort.	
Allergies and ac	verse reaction	s 🛑	72.33 %	<u>View Guidelines</u>
Medicines			24.40 %	View Guidelines
Medical History			87.67 %	View Guidelines
Health Risk Fac	tors		57.54 %	View Guidelines
Immunisations		Ŏ	61.59 %	View Guidelines
Relevant Family	History	Ŏ	44.54 %	View Guidelines
Relevant Social	History		73.80 %	View Guidelines
Non-Duplicate F	Patients		0.00 %	

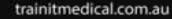


2.

Increase use of digital technologies for automating processes.







Technology

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





Improve communication with providers, patients & staff.



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Understand each other's roles

What does your team look like?

GP's? GP Registrars? Medical Students? Non-GP Specialists? Pharmacists? Pharmacists? RN's? EN's? Nurse Practitioners? Medical Practice Assistants? Admin Staff? Management? Allied Health?



Meetings & Business Planning

Clear Form

Day:

COVID-19 Daily Management Plan

Date:



 Visit key websites for updates 	5					
a. www.wqphn.com.au/news-ever	its/coronavirus					
b. https://www.qld.gov.au/health/conditions/health-alerts/coronavirus-covid-19/current-status/current-						
status-and-contact-tracing-alert						
c. https://www.health.gld.gov.au/						
	s/health-alerts/novel-coronavirus-2019-ncov-health-alert					
Key points for discussion at team mee						
key points for discussion at team net	B					
•						
•						
•						
•						
•						
Daily Team Meeting:						
Attendance:						
Actions from yesterday's meeting:						
· · · · · · · · · · · · · · · · · · ·						
What's changed since yesterday:						
what's changed since yesterday.						
What's on today:						
what's on today.						
lanuar ann ann an 11/110 sieles asian de						
Issues, concerns, or WHS risks raised:						
Improvement suggestions (CQI):						
Update whiteboards, notice t	ooards, 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	-					
	e infection control techniques and staff PPE?					
	or concerns? If yes, to follow up					
9. Today's good news story:	or concerns, in yes, to follow up					
 roday s good news story. 						
1						

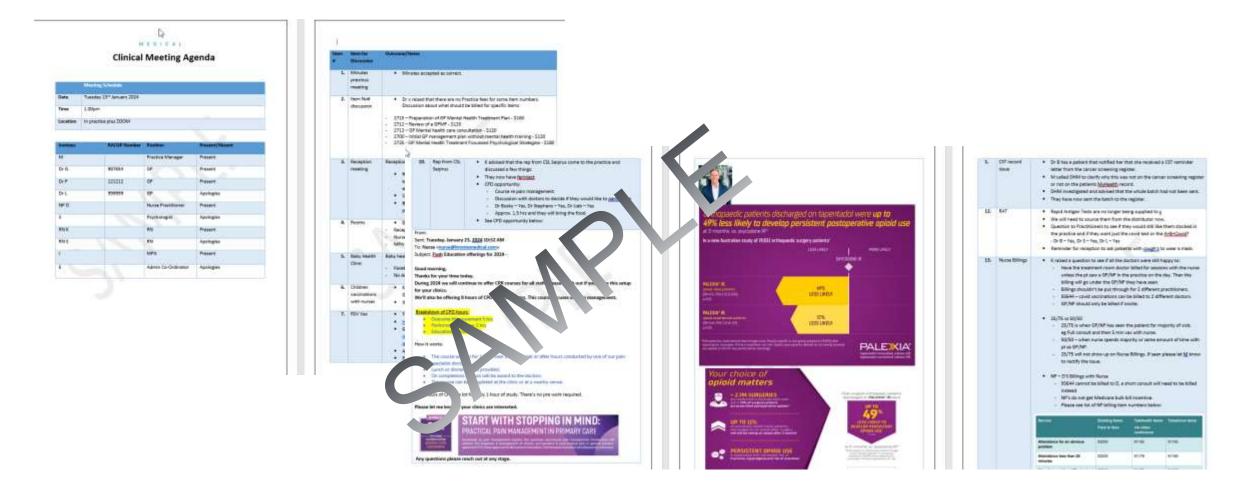
10. Provide feedback to your PHN coordinator on any good news stories, issues, or concerns

Create an empowered team culture



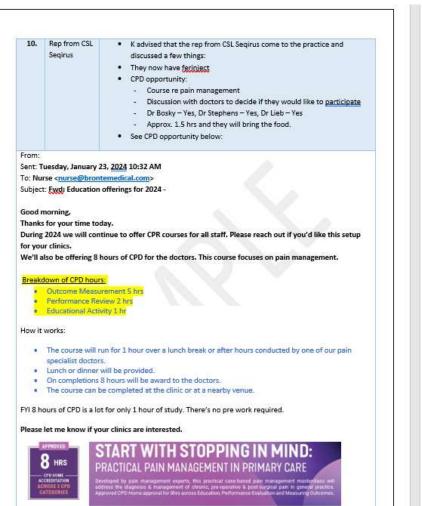


What are other practices doing?

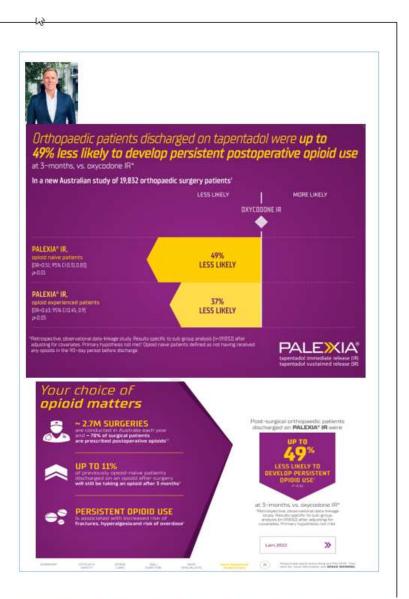


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Any questions please reach out at any stage.

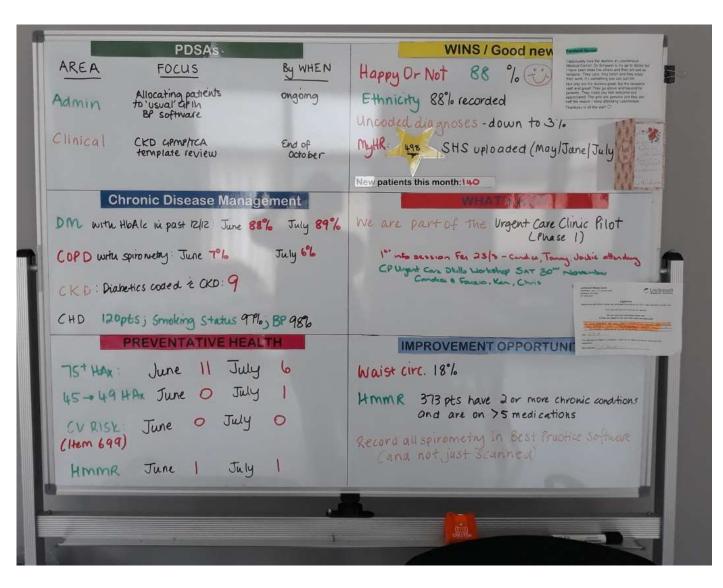


1.	CST record issue	 Dr 8 has a patient the letter from the cance M called DHM to clar or not on the patient DHM investigated an They have now sent to 	er screening regi ify why this was s <u>MyHealth</u> reco d advised that tl	ster. not on the cance rd. he whole batch ha	r screening register
12.	RAT	 Rapid Antigen Tests a We will need to sour Question to Practitio the practice and if th Dr B – Yes, Dr S – Ye Reminder for reception 	ce them from th ners to see if the ey want just the es, Dr L – Yes	e distributor now. ey would still like t covid test or the	them stocked in AtBtCoxid?
13. Nurse Billin	Nurse Billings	unless the pt sa billing will go un - Billings shouldn' - 93644 - covid vi - GP/NP should o - 25/75 vs 50/50 - 25/75 is when G eg Full consult a - 50/50 - when n pt as GP/NP. - 25/75 will not sl to rectify the iss • NP - D'S Billings with - 93644 cannot b instead. - NP's do not get - Please see list o	ent room docto w a GP/NP in the ider the GP/NP t it be put through accinations can I nly be billed if or iP/NP has seen t nd then 5 min w urse spends maj how up on Nurse ue. Nurse e billed to D, a sl Medicare bulk b f NP billing item	r billed for session a practice on the o hey have seen. In for 2 different pro- be billed to 2 different nsite. The patient for ma ax with nurse. ority or same and a Billings. If seen p hort consult will n ill incentive. numbers below:	is with the nurse lay. Then the ractitioners. rent doctors. jority of visit. ount of time with lease let <u>M</u> know eed to be billed
		Service	Existing items Face to face	Telehealth items via video- conference	Telephone items
		Attendance for an obvious problem	82200	91192	91193
		Attendance less than 20 minutes	82205	91178	91189
		Attendance at least 20 minutes	82210	91179	91190

Attendance at least 40 minutes 82215

91191

91180



Example from Leschenautt Medical, Bunbury, WA

Bingo Cards

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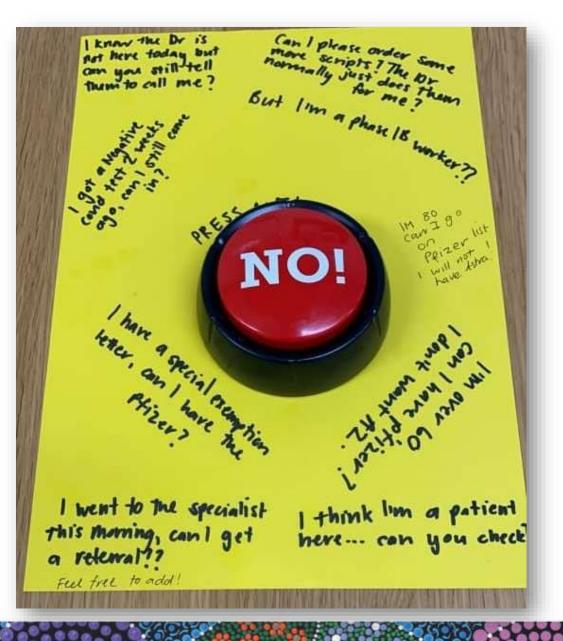
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Patient drops off food	"Just get him to call me"	lina o regula Will fitme in apt x	"I missed my Telehealth"	"No, you're here to see the nurse"
"is pathology in today?"	"The government says I can get the AZ vaccine"	"Do you have Pfizer?"	"I thought it was bulkbilled"	"Cancel my Careplan, I don't need it"
Mum/wife books appt for incapable men	annoging regular cultur	"Do I call him or does he call me""	The doctors don't see medical reps"	"I really need a doctors appt todayno it can't be another doctor"
I'm at the pharmacy, they don't have my script"	"Mary?"	annoying rystar caller #2	Postallar	"How much longer is the wait?"
"I need to speak to DRX	"I need to book an appt for mum/dad"	"Have my results come in yet?"	"I got a missed call" "Was it a call or a text?"	Symptomatic hasn't had COVID test yet

Credit: Karlene Jeffery, PM

Humour & Support



Credit: Patricia Rigg, PM

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4.

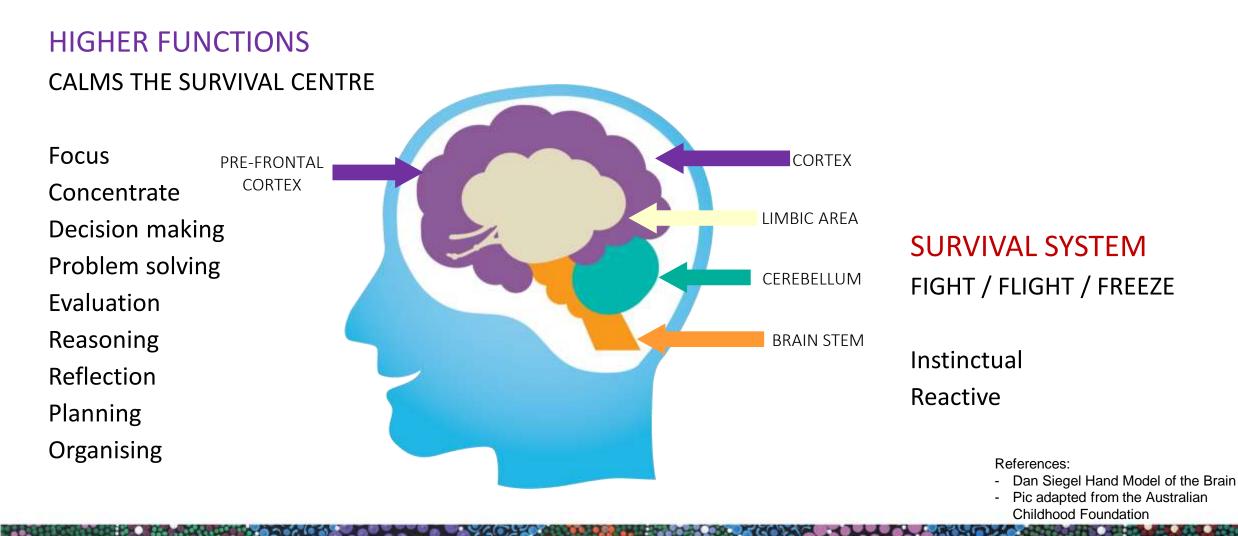
Discuss strategies for conflict management.



Create the vision and build your TEAM



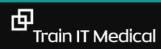
A very basic lesson on brain structure



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We have a lot to explain and angry people often see explaining as a way of fighting back.



The importance of emotions in healthcare practices



Emotional preparation

Emotional debrief

Watch animated short video by Dr Brene Brown

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Youtube: Brene Brown, Empath

CPR for Conflict

- Start with the facts, paint a picture
- Say what's happening, using a CPR approach:
- C Content
- P Pattern? How it repeats
- R Relationships? the impact on others



You may have to dig deeper... Known vs Unknowns

- Known
- Known Unknowns
- Unknown Unknowns

Things I can't ignore Things I can ignore? **Content** – The Facts Paint a picture - using mobile phone - gossiping? eg I saw, I noticed, it was reported at front desk? Pattern – How it repeats - occasional gossip? - swearing in front of eg The last 3 shifts... patients? 3 days you left... - untidy desk? - swearing at other Relationship – the impact on others staffmembers - swearing? Eg patients privacy was breached

CPR for Conflict Preparation

CONTENT:

State the facts of the matter. Paint a picture. Use words like "I noticed", "I observed", "It was reported to me." List facts

PATTERN:

State how often this has been occurring and under what circumstances. "This has happened 3 times this week"

RELATIONSHIP:

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How is what they are doing affecting others. State the visible and invisible consequences.

5 tips for Self-care



- 1. If it gets overwhelming practice some belly breathing.
- 2. Have a code word with co-worker if you are getting overwhelmed/scared.
- 3. Support each other, ensure everyone has a break from the phones.
- 4. Close the conversation if unhealthy.
- 5. Have a contract with your co-worker and go for a walk.



HOW MUCH YOU CAN CONTROL?

I CAN'T CONTROL

Other people's actions How others behave The past How others live their lives Whether others like me What others say Other people's choices The future Other people's reactions What others think

I CAN CONTROL

My actions My behavior The present How I live my life now The way I behave My words The choices I make Where I devote my focus How I see others Who I spend time with

5.

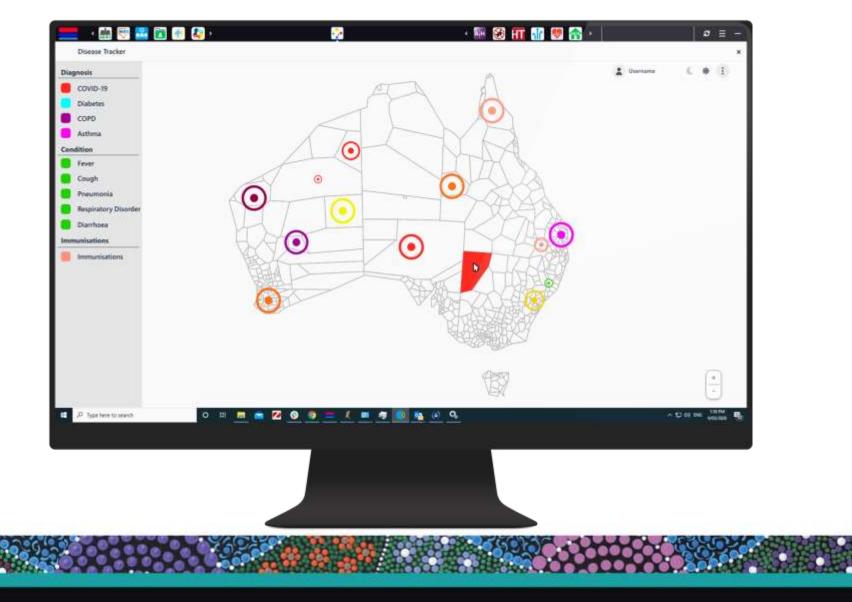
Explore ideas for optimising business and patient care opportunities.

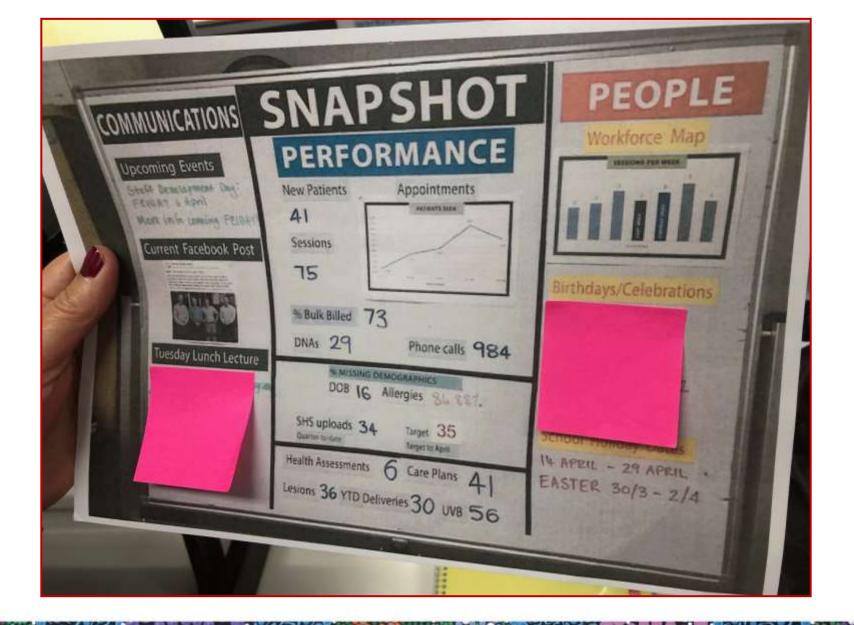


Activity: How do you get patient input?

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What does your data tell you?





Example from rural WA



CKD Quality Improvement Activity /PDSA - Sample

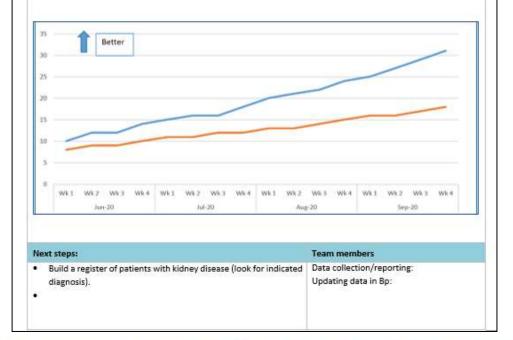


1. What is our goal?

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

2. How will we measure our progress?

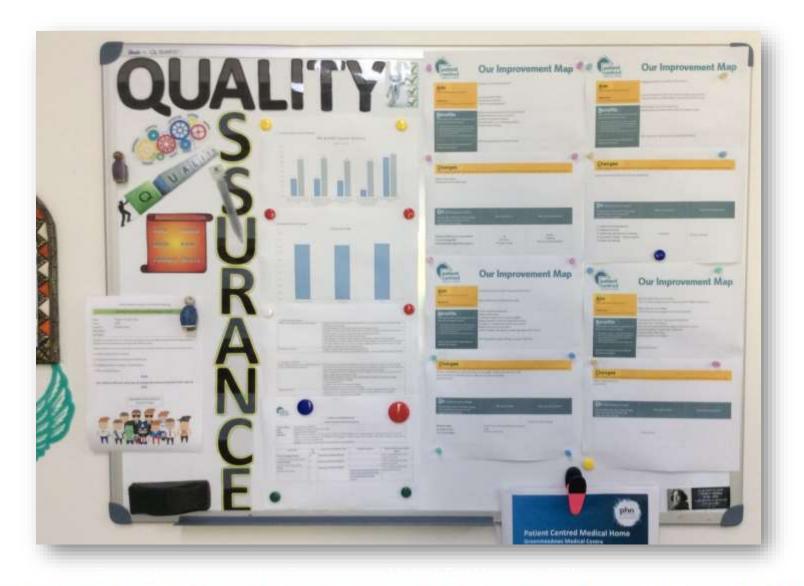
- 1. Identify regular patients in with uncoded kidney disease...
- 2. Increase the number of patients with kidney disease who have a management plan.....



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



Engage your team



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PDSA station

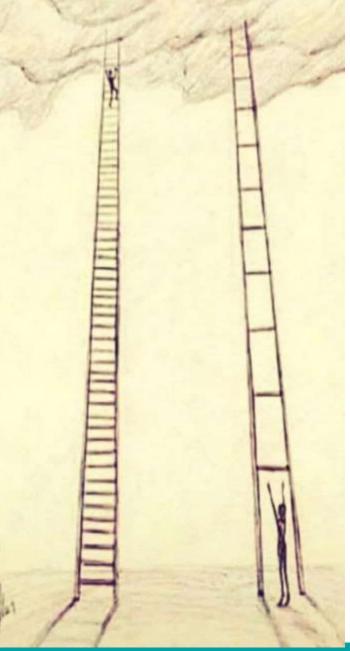


Example from Leschenautt Medical Centre, WA

Keep developing your Change Management skills







My top tips:

- 1. Document and review improvement activities
- 2. Set small achievable goals
- 3. Adopt an infinite mindset
- 4. Collaborate and train new processes
- 5. Implement ideas to build a team spirit
- 6. Monitor and communicate performance
- 7. Celebrate progress no matter how small.



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.









support@wentwest.com.au

Email katrina@trainitmedical.com.au or www.trainitmedical.com.au/contact

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 2039 roadshow presentation here.

Read HotDoc's PIP QI Q&A interview with Katrina Otto.

Check out our checklist to be eligible for PIP Qt:

DO NOW	- and the second
Practice accreditation	Postali & Isorn Pan (1), Paler or MD Bagdits (data extraction feels)
Anima data sharing ignormat with vi Pronary mails federate (Prit)	af 🖌 Spoine the improvement blockers
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We share because we care

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

And now we want to share them with you.

Our resources include useful checklists, cheatsheets, links, news articles, heipful documents and much more.

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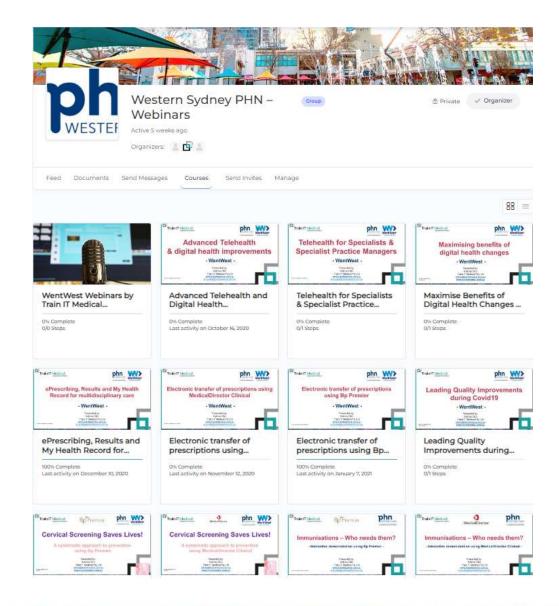
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Contact us or your PHN support person for your enrolment code.

Course Materials



PRACTICE PRIORITIES 'GOLD CLASS'



- Webinar +Recording & Slides
 Practice Manager Resources
 Q&A with our elite team
- Training Certificates
- 5. Priority notifications

\$55 per practice

SPECIAL OFFER

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Access our meeting template here:

https://app.gomodern.co/v2/previ ew/szCROKT4imhE5p8mte6W? notrack=true





Competence with Confidence

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Scan the QR code above and tell me what you need. I'd love to hear from you! Thank you and best wishes, Katrina Otto, Train IT Medical.