NHS England

Example induction checklist template for multidisciplinary team staff in general practice

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Introduction

NHS England and frontline general practice professionals have designed this example induction checklist template to support staff new to general practice, and with the primary care network (PCN) multidisciplinary team (MDT) in mind. It may also be useful to individuals who have been working in primary care for some time but would benefit from an orientation, and other staff new to a primary care setting but not part of the MDT.

Aim

An effective induction process makes staff feel welcome and helps them settle into their role more quickly.

This example induction checklist template provides a consistent and comprehensive set of steps to give staff in primary care settings an effective induction, supporting them to integrate and gain confidence in their new roles. Primary care organisations may wish to consider using this template as part of their standard induction processes, tailoring the checklist items to suit local needs.

This is intended as optional guidance. Practices, PCNs and other employers are responsible for ensuring their staff undergo an appropriate induction to the organisation and their role.

Objectives

- To help staff new to primary care understand the primary care setting.
- To enable their safe and effective working within a new environment.
- To provide a standardised approach to induction, which organisations can tailor to meet local needs.

Induction checklist template

Practice site information	Date(s) completed	Requirements
Location(s) staff member will be working in		Essential
Addresses and phone numbers of practices within the PCN		Essential
Access arrangements to buildings including evacuation plans		Essential
Parking arrangements and mileage allowance		Essential
Opening hours and extended access arrangements		Essential
Location of toilets, changing, refreshment and rest areas		Essential
Teams in practices and PCNs	**Date(s) completed**	**Notes**
Contact details for key staff working across the PCN		Essential
Contact details for line manager		Essential
Contact details for GP/clinical supervisor		Essential
Staff introductions	**Date(s) completed**	**Notes**
Introduction to clinical directors, practice and PCN teams		Essential
Explanation of organisational structure and committee structures, systems and processes (GP/ PCN / cluster / federation/trust structure)		Essential
Introduction to peer support networks, groups or forums within PCN		Essential
IT and communication systems	**Date(s) completed**	**Notes**
Provided with IT equipment (eg laptop) where required and access (eg system login, NHS Smartcard) to perform role		Essential
Induction to clinical system(s) used by the PCN practices including any training required		Essential
IT help desk contact details		Essential
Induction to telephony systems		Essential

Orientation in primary care	Date(s) completed	Notes
Introduction to general practice		Essential
Introduction to primary care and primary care networks		Essential
Read relevant ARRS roles information on the NHS England website		Essential
Familiarisation with relevant sections of the Network Contract DES and role-specific guidance		Desirable
The primary care network handbook		Desirable
Training	**Date(s) completed**	**Notes**
Introduction to allocated clinical supervisor and discussion around supervision allocation time		Essential
Explanation of mandatory training required (eg information governance, equality and diversity, safeguarding) and time needed to complete		Essential
Added to local mailing list for education and training		Essential
Provided with Training Hub website and contact details		Essential
Shadowing practice roles, eg GP, additional roles staff, reception, PCN and practice managers		Optional
Register here for elearning for healthcare		Optional
Policies and procedures	**Date completed**	**Notes**
Shown procedure for booking with GP for emergency and routine follow-ups		Essential
Shown procedure for booking with other general practice healthcare professionals		Essential
Familiarisation with and access to existing letter templates or methods for:		
• Secondary care referrals (and awareness of local clinical pathways)		Essential if applicable to the role
• Urgent and emergency referrals		Essential if applicable to the role
• MSK physiotherapy (both outpatient and community)		Essential if applicable to the role

• Other reablement services (eg falls services / occupational therapy / podiatry)		Essential if applicable to the role
• Talking therapies / mental health services		Essential if applicable to the role
• Smoking cessation / dietitian / exercise referral		Essential if applicable to the role
• Local services for social prescribing (including key NHS, social and voluntary organisations in the area and how to signpost)		Essential if applicable to the role
• Clinical / medical emergency plan: adverse drug reactions, anaphylaxis, red flags, cardiac arrest, first aid and medical kit, etc		Essential if applicable to the role
• Prescribing policy and procedure		Essential if applicable to the role
Lone worker policy		Essential
Home visits policy		Essential
Complaints policy and information about Freedom To Speak Up guardian		Essential
Triaging policy and procedure		Essential
Access to chaperones		Essential
How to report incidents or adverse events		Essential
Sickness and absence policy and procedure		Essential
Safeguarding	**Date completed**	**Notes**
Practice(s) safeguarding policy and procedure		Essential
Safeguarding training		Essential
Practice(s) lead for safeguarding adults, children and young people		Essential
Key safeguarding contacts: ICS, social services (including out of hours duty team), police		Essential
Line management	**Date completed**	**Notes**
Familiarisation with job description and/or service specification		Essential

	Date completed	Notes
Create a job plan		Essential
Arrangements for appraisal and 1-to-1 line management meeting		Essential
PCN working arrangements, eg split of time in each member practice, managing annual leave across sites		Essential
Supplementary reading and reference materials	**Date completed**	**Notes**
Subscribe to mailing lists relevant to job role		Optional
Sign up for the FutureNHS collaboration platform		Optional