



Practice management

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Curriculum for Australian General Practice 2011**

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Definition

Practice management involves decisions, actions and resource allocation to enable the provision of professional services to meet the objectives of the organisation.

The management of a medical practice requires understanding of the needs of the health professionals, patients, nonmedical staff and the community.^{1,2} Management processes involve planning, finance, technology application, information and, most importantly, people.²

Curriculum in practice

The following case illustrates how the practice management curriculum applies to general practice:

- Jackie is a talented and enthusiastic GP who moved to a small town over a year ago. She quickly developed a busy practice and now finds she works longer hours than she would like. Her appointments are booked out 3 weeks in advance so people who are acutely unwell must be fitted in on top of an already heavy schedule. Consequently, Jackie regularly misses lunch and does not arrive home until after dark, by which time she feels too tired to walk her dog. Jackie works as a solo GP because she did not feel comfortable joining the other practice in town that has two older doctors, which meant she would be on call every night. She has a high number of pensioners whom she bulkbills. She knows she should be doing more care plans and health promotion work but doesn't have the time. She doesn't employ a nurse, but does have a great practice manager who also works at the front desk as a receptionist. Jackie needs a holiday, but can't afford to pay a locum as her cost structures and overheads are 80% of her income. She is feeling that it is getting too difficult to stay in the town.

Rationale and general practice context

The effective delivery of healthcare to patients and the community depends on efficient practice management systems that address the needs of patients, the community and health professionals in a balanced, responsive and cost effective way.

GPs as managers

Involvement in management is not confined to practice owners and practice managers, but also requires the participation of all persons in the practice. General practitioners, as health professionals, need to learn and apply management knowledge and skills to ensure the best outcomes for their patients and themselves.

This role of GPs as managers is becoming an increasingly important part of general practice training in relation to practice management and health needs of the community due to:

- the increasing move toward more multidisciplinary team community based care
- workforce shortages
- evolving funding arrangements of healthcare
- evolving health information management in the context of rapidly expanding e-health processes
- the application and accreditation of quality management principles, evidence based management and risk management to all areas of practice management.

Organisational skills are the foundation of good practice management. While management skills have traditionally not taken a high role in medical education, they are essential to ensuring the viability of high quality general practice services and, therefore, the cornerstone of the Australian health system. While many individual issues require attention for effective practice management, they can be grouped into areas of financial management, working with people, managing facilities, practice quality and safety and information management.

Practice management provides the medium for clinical practice and is a significant determinant in successful health outcomes. The application of practice management occurs across the five domains of general practice, and is critical in the working life of the GP and needs to be sensitive to the context of general practice. Wherever a clinical activity occurs there is a management activity occurring in tandem. For example, performing a Pap test requires a range of management activities including the provision of facilities and equipment, couriers for slides, information management, recall systems and staff.

General practitioners need to effectively manage their professional role as a medical practitioner and organisational role as a member of a general practice, regardless of whether they have an ownership or an employee role.

General practitioners are increasingly working as part of a multidisciplinary general practice team, presenting new challenges to practice management. Human resource management will become more complex including processes associated with recruitment and ongoing staff management.

General practitioners practice in a range of clinical situations and the management processes involved will vary according to the setting. To enable all doctors to fulfil their clinical role, knowledge of management is needed. Further understanding is required for GPs who are running their own practice compared to being an employee GP.

Clinical governance and GPs as clinical leaders

Health reforms in quality and safety mean there is an increasing role in clinical governance. The RACGP has defined this as a framework for clinicians and health service managers to be jointly accountable for patient safety and quality care.¹

Clinical leaders are appointed within a practice to help implement clinical governance through their role of:

- being responsible for safety and quality improvement systems within the practice
- ensuring accountability of all staff involved in monitoring and improving care and services
- developing a problem solving multidisciplinary team systemic approach that promotes a climate of safety and quality.

The skills required for GPs to be clinical leaders include ongoing education, the use of clinical audits, implementing clinical effectiveness, managing risk, research and development, and promoting openness of management.¹

Clinical leaders need to understand their roles and responsibilities¹ as part of their practice management training.

Related curriculum areas

Refer also to the curriculum statements:

- *E-health* for electronic support of practice management
- *Procedural skills*
- *Quality and safety* for educational implications for practice management.

Training outcomes of the five domains of general practice

1. Communication skills and the patient-doctor relationship

- PMAT1.1 Communicate clearly with patients and their carers with respect to practice operational procedures such as opening times, access to after hours services and home visits, and costs and billings.
- PMAT1.2 Identify and overcome potential barriers to communicating practice procedures, for example, in patients with disabilities, young people and patients from linguistically and culturally diverse backgrounds.

2. Applied professional knowledge and skills

- PMAT2.1 Apply the regulations that affect the business of general practice which are essential for effective patient management.

3. Population health and the context of general practice

- PMAT3.1 Have an overall knowledge of the special characteristics of the Australian health system, how general practice operates within this environment and how this influences Australian practice management practice processes, including special issues relating to the local community.

4. Professional and ethical role

- PMAT4.1 Understand the role of clinical and practice governance.
- PMAT4.2 Know the ethical and legal considerations that influence all practice management processes.
- PMAT4.3 Balance work-life issues when operating practices to ensure successful management of professional and personal issue.
- PMAT4.4 Understand clearly the roles, responsibilities and skill sets required of general practitioners working within multidisciplinary and practice teams.
- PMAT4.5 Understand the roles, responsibilities and skill sets required to be a clinical leader.

5. Organisational and legal dimensions

- PMAT5.1 Know the organisational skills required for ensuring successful and viable high quality general practice services.
- PMAT5.2 Know the principles of effective practice management including:
- PMAT5.2.1 financial management
 - PMAT5.2.2 working with people
 - PMAT5.2.3 managing facilities
 - PMAT5.2.4 practice quality and safety
 - PMAT5.2.5 information management
 - PMAT5.2.6 clinical governance.

Learning objectives across the GP professional life

Medical student

1. Communication skills and the patient-doctor relationship

- PMALM1.1 Describe the importance of communicating practice policies and procedures, such as appointment booking to patients and community.
- PMALM1.2 Discuss the barriers to effective communication regarding practice operating procedures to patients with disabilities, young people and those from culturally and linguistically diverse backgrounds.
- PMALM1.3 Describe the importance of communication skills for patient service delivery, including dealing with complaints.

2. Applied professional knowledge and skills

- PMALM2.1 Identify regulations that apply to medical practitioners and their implications for professional practice.
- PMALM2.2 Describe the essential features of medical practice legislation, codes and guidelines that affect Australian jurisdictions.
- PMALM2.3 Describe the difference between an employee and contractor.
- PMALM2.4 Describe the management roles and responsibilities of a practice owner.

3. Population health and the context of general practice

- PMALM3.1 Describe the healthcare system in Australia and contrast this with international examples.
- PMALM3.2 Describe and contrast public and private healthcare in Australia.
- PMALM3.3 Outline the compensation programs for work and traffic injuries.

4. Professional and ethical role

- PMALM4.1 Discuss the Australian Medical Association (AMA) Code of Ethics Statement in practice management.
- PMALM4.2 Explain the role of business ethics in a medical practice.
- PMALM4.3 Describe and compare stages of a medical career.
- PMALM4.4 Analyse issues relating to balancing professional and personal life.

5. Organisational and legal dimensions

- PMALM5.1 Outline patient billing in general practice including private fees, bulk-billing and third party payments.
- PMALM5.2 Describe the major costs in operating a general practice and provide examples of how these can be controlled.
- PMALM5.3 List and describe job roles in a solo and group general practice.
- PMALM5.4 Describe and provide examples of GPs working in a health team.
- PMALM5.5 Describe and compare the role of a GP in the community with the role of medical specialists in a hospital.
- PMALM5.6 Describe the infrastructure needs for general practice.
- PMALM5.7 Outline basic principles of quality management.
- PMALM5.8 Give examples of medical risk and business risk in general practice.
- PMALM5.9 Understand processes for managing information in general practice, including health and business information.
- PMALM5.10 Explain regulations relating to health information and their application.
- PMALM5.11 Describe how health information is recorded and used.
- PMALM5.12 Describe the use of patient recall systems.

Learning objectives across the GP professional life

Prevocational doctor

Assumed level of knowledge – medical student

1. Communication skills and the patient-doctor relationship

- PMALP1.1 Demonstrate effective communication of hospital, institutional or organisation operating policies and procedures such as appointment booking to patients.
- PMALP1.2 Demonstrate effective skills for overcoming barriers to communicating hospital, institutional or organisational practice operating procedures to patients such as patients with disabilities, young people and people from culturally and linguistically diverse backgrounds.
- PMALP1.3 Outline communications skills required for dealing with complaints in the hospital, institutional or organisational setting.

2. Applied professional knowledge and skills

- PMALP2.1 Describe the complex interaction between the healthcare environment, patient and doctor.
- PMALP2.2 Outline how physical or cognitive disability can limit access to healthcare services.
- PMALP2.3 Describe legal/institutional requirements for health records.
- PMALP2.4 Outline the role of the health record in continuity of care.
- PMALP2.5 Outline how time management affects patient care and hospital function.
- PMALP2.6 Demonstrate an ability to prioritise daily workload, including demonstrating punctuality in the workplace.
- PMALP2.7 Demonstrate an appropriate standard of professional practice and work within personal capabilities.
- PMALP2.8 Explain the principles of medical triage.
- PMALP2.9 Outline the elements of effective discharge planning (eg. early, continuous, multidisciplinary).
- PMALP2.10 Follow organisational guidelines to ensure smooth discharge.

3. Population health and the context of general practice

- PMALP3.1 Describe the legal requirements in patient care (eg. mental health legislation, death certification, prescribing laws).
- PMALP3.2 Complete medicolegal documentation appropriately.
- PMALP3.3 Liaise with legal and statutory authorities.
- PMALP3.4 Demonstrate compliance with informing authorities of notifiable diseases.
- PMALP3.5 Describe logistic processes of disease outbreak management.
- PMALP3.6 Outline the Medicare Benefits Schedule (MBS) and Pharmaceutical Benefits Scheme (PBS).

4. Professional and ethical role

- PMALP4.1 Describe and demonstrate respect for the roles and responsibilities of team members.
- PMALP4.2 Participate fully in teams, recognising that teams extend outside the hospital (eg. GPs).
- PMALP4.3 Demonstrate preparedness to adopt a range of roles within a team.
- PMALP4.4 Understand the characteristics of effective teams.
- PMALP4.5 Demonstrate an ability to work with others and resolve conflicts when they arise.
- PMALP4.6 Demonstrate flexibility and preparedness to change.
- PMALP4.7 Outline the leadership role that may be required of a doctor.
- PMALP4.8 Show an ability to work well with others and lead them.
- PMALP4.9 Outline the skills of a good leader.
- PMALP4.10 Reflect on personal experiences, actions and decision making.
- PMALP4.11 Outline the ethical complexity of medical practice, and follow professional and ethical codes.
- PMALP4.12 Demonstrate consultation with colleagues about ethical concerns.
- PMALP4.13 Accept responsibility for ethical decisions.
- PMALP4.14 Outline the personal health risks of medical practice such as fatigue and stress.
- PMALP4.15 Maintain personal health and wellbeing.
- PMALP4.16 Recognise the potential risk to others from your own health status.

5. Organisational and legal dimensions

- PMALP5.1 Identify the different types of healthcare teams (eg. resuscitation team and multidisciplinary stroke team including patient and carer team members where possible).
- PMALP5.2 Demonstrate respect for the leadership role within a team, such as nurse unit manager and trauma resuscitation leader.
- PMALP5.3 Demonstrate provision of access to culturally appropriate healthcare.
- PMALP5.4 Describe the harm caused by errors and system failures.
- PMALP5.5 Document and report adverse events in accordance with local incident reporting systems.
- PMALP5.6 Demonstrate recognition and management of adverse events and near misses.
- PMALP5.7 Demonstrate consultation with colleagues about ethical concerns.
- PMALP5.8 Demonstrate acceptance of responsibility for ethical decisions.
- PMALP5.9 Outline the personal health risks of medical practice such as fatigue and stress.
- PMALP5.10 Outline measures for maintaining personal health and wellbeing.
- PMALP5.11 Recognise the potential risk to others from your own health status.

Learning objectives across the GP professional life

Vocational registrar

Assumed level of knowledge – prevocational doctor

1. Communication skills and the patient-doctor relationship

- PMALV1.1 Demonstrate effective communication of practice operating policies and procedures such as appointment booking, to patients and community in the general practice and community based setting.
- PMALV1.2 Demonstrate effective skills for overcoming barriers to communicating practice operating procedures to patients with disabilities, young people and those from culturally and linguistically diverse backgrounds in the general practice and community based setting.
- PMALV1.3 Outline communications skills required for dealing with complaints in the general practice and community based setting.

2. Applied professional knowledge and skills

- PMALV2.1 Discuss regulations that apply to medical practitioners and their implications for professional practice including business regulations in a medical practice context, including the Trade Practices Act, occupational health and safety regulations and equal employment opportunity legislation.

3. Population health and the context of general practice

- PMALV3.1 Outline general practice models of service delivery.
- PMALV3.2 Identify community agencies and health practitioners and describe their relationship with local GPs.
- PMALV3.3 Explain health insurance to patients.
- PMALV3.4 Use and interpret MBS, PBS and government funding programs as they apply to general practice, including Practice Incentive Payments (PIP), Service Incentive Payments (SIP) and other blended payments.

4. Professional and ethical role

- PMALV4.1 Describe the management roles and responsibilities of a practice owner.
- PMALV4.2 Describe features of good practice governance.
- PMALV4.3 Describe features of good clinical governance.
- PMALV4.4 Discuss and evaluate activities that improve personal wellbeing.
- PMALV4.5 Describe the process of assessing a practice to join, or purchase, in relation to personal needs.
- PMALV4.6 Define clearly the roles, responsibilities and skill sets required of GPs working within multidisciplinary and practice teams.

5. Organisational and legal dimensions

- PMALV5.1 Outline the processes involved in employing people in general practice.
- PMALV5.2 Describe and demonstrate processes for developing and leading people in a practice.
- PMALV5.3 Describe and compare different costing and billing practices.
- PMALV5.4 Manage and develop relationships with team colleagues.
- PMALV5.5 Describe and use negotiation skills.
- PMALV5.6 Employ conflict resolution skills with patients and staff.
- PMALV5.7 Outline the use of motivation and goal setting.
- PMALV5.8 Explain the important elements of infrastructure design and maintenance in general practice.
- PMALV5.9 Describe equipment maintenance requirements for general practice.
- PMALV5.10 List insurance requirements in general practice.
- PMALV5.11 Describe security measures in general practice for provider identifying information such as prescriptions, provider and prescriber numbers.
- PMALV5.12 Analyse and evaluate risk in general practice and strategies for managing risk.
- PMALV5.13 Describe the role and summarise the content of RACGP *Standards for general practices*.
- PMALV5.14 Describe the quality improvement process in general practice. For example, outline the PDSA (plan, do, study, act) cycle.
- PMALV5.15 Compare customer service in a general practice to the retail sector.
- PMALV5.16 Respond to, and resolve, patient complaints.
- PMALV5.17 Identify high risk areas for adverse patient outcomes in general practice.
- PMALV5.18 Compare paper and electronic health information management.
- PMALV5.19 Consider issues of back up, database integrity and security (eg. virus protection).
- PMALV5.20 Use patient recall systems and risk management procedures.
- PMALV5.21 Identify critical business information systems in general practice.
- PMALV5.22 Identify information sources for a general practice.
- PMALV5.23 Outline practice continuity planning requirements.
- PMALV5.24 Describe the different legal forms of practice especially in regard to liability including company, partnership, associateships and trusts.
- PMALV5.25 Describe the legal and ethical responsibilities that an employer has to their staff.

Learning objectives across the GP professional life

Continuing professional development

Assumed level of knowledge – vocational registrar

1. Communication skills and the patient-doctor relationship

PMALC1.1 Review communication skills required for the effective delivery of general practice services.

2. Applied professional knowledge and skills

PMALC2.1 Review level of required professional knowledge areas in practice management, especially business requirements.

PMALC2.2 Demonstrate, when appropriate, that clinical leadership skills are current.

3. Population health and the context of general practice

PMALC3.1 Demonstrate optimisation of patient care systems to utilise special funding and access arrangements for patients.

4. Professional and ethical role

PMALC4.1 Evaluate and implement practice governance activities.

PMALC4.2 Formulate a professional development plan.

PMALC4.3 Assess strategies for marketing professional services.

PMALC4.4 Evaluate the role of public relations activities in general practice.

PMALC4.5 Develop a succession plan.

PMALC4.6 Identify and develop the clinical leader(s) in your practice.

5. Organisational and legal dimensions

PMALC5.1 Analyse and evaluate a business strategy.

PMALC5.2 Measure practice performance.

PMALC5.3 Formulate a business plan.

PMALC5.4 Evaluate superannuation and investment strategies.

PMALC5.5 Describe financial reporting and tax compliance requirements for general practice.

PMALC5.6 Describe the use of management accounting skills in general practice.

PMALC5.7 Evaluate financing options in general practice.

PMALC5.8 Describe the process to manage change.

PMALC5.9 Describe and evaluate practice culture and recognise elements of practice culture that promote improvement and those that impede improvement.

- PMALC5.10 Develop and review policies and procedures relating to employment including job descriptions; advertising and recruitment; interviewing and selection; orientation, training; performance management and appraisal, feedback and termination.
- PMALC5.11 Evaluate facility utilisation.
- PMALC5.12 Compare financing and investment strategies in providing practice facilities.
- PMALC5.13 Meet current quality standards such as those described in the RACGP *Standards for general practices* and the RACGP *Infection control standards for office based practices*.
- PMALC5.14 Use practice audits to improve patient service and care.
- PMALC5.15 Apply continuous improvement and quality tools to improve practice activities.
- PMALC5.16 Identify and develop communication strategies and barriers that promote or impede improvements in healthcare.
- PMALC5.17 Analyse near miss and critical incidents.
- PMALC5.18 Use patient feedback to improve patient service.
- PMALC5.19 Use practice information sources including databases to improve care.
- PMALC5.20 Use practice information systems to assess practice capacity, demand and equity of care.
- PMALC5.21 Develop and use key performance indicators for achieving practice objectives.

References

1. The Royal Australian College of General Practitioners. Standards for general practices 4th edn. 2010. Available at www.racgp.org.au/standards.
2. Steer N, National Standing Committee – GP Advocacy and Support. General practice management toolkit. Modules 1 to 11. Melbourne: The Royal Australian College of General Practitioners; 2007.

