**Practice Manager Handover Checklist**

A guide for Practice Managers who are about to leave their positions, either temporarily or permanently, to assist their successor to carry out usual Practice Manager duties.

# Company

[ ] RO and OMO numbers – update if necessary

[ ]  delegations – update as requiredPRODA/HPOS delegations – update as required

[ ]  /[WIP](https://www.servicesaustralia.gov.au/organisations/health-professionals/services/medicare/workforce-incentive-program-wip-practice-stream) authorisations – update as requiredPIP/[WIP](https://www.servicesaustralia.gov.au/organisations/health-professionals/services/medicare/workforce-incentive-program-wip-practice-stream) authorisations – update as required

[ ]  / myGov ID – update if necessaryATO (Australian Tax Office) Business Portal / myGov ID – update if necessary

[ ] [ASIC (Australian Securities and Investments Commission)](https://asic.gov.au/) access – update if necessary

[ ] [ABR (Australian Business Register)](https://www.abr.gov.au/) access

[ ] [ABN (Australian Business Number)](https://www.business.gov.au/registrations/register-for-an-australian-business-number-abn) access

[ ] Lawyer contact details

# Banking/Finance

[ ] Accountant and bank contact details

[ ] Update signatories on accounts

[ ] Update authorized contact for EFTPOS machines (e.g. Tyro)

[ ] Practice budgets

[ ] Details on bas / superannuation procedures and timing

[ ] Details of wages (timing and also procedures for contractors for calculations)

# IT and Data Management

[ ] Advise IT support of change

[ ]  Company folders/drives – content and access

[ ]  IT security and data management (data back-ups)

[ ]  Digital Health:

* Run through [PRODA](https://proda.humanservices.gov.au/prodalogin/pages/public/login.jsf?TAM_OP=login&ERROR_CODE=0x00000000&URL=%2F&OLDSESSION=)
* [Telehealth software](https://www.racgp.org.au/running-a-practice/technology/clinical-technology/telehealth)
* Secure messaging software ([Medical Objects](https://www.medicalobjects.com/), [Health Link](http://www.healthlink.net/support.htm), [Argus](https://www.telstrahealth.com/argus), etc)

[ ]  Printer management

[ ]  Update log in details and access list as appropriate

* Medical software (e.g. [Medical Director](https://www.medicaldirector.com/support), [Best Practice](https://bpsoftware.net/), [Zedmed](https://www.zedmed.com.au/support-and-training))
* Diagnostic software (e.g. ECG/spirometry software)
* Equipment software (e.g. vaccine fridge data logger)
* Results downloader (e.g. [Medical Objects](https://www.medicalobjects.com/))
* Remove old PM remote access and server access and add new PM
* Account program access (e.g. [Xero](https://www.xero.com/au/), [MYOB](https://www.myob.com/au))
* Website admin access
* Change social media access – Facebook, Twitter, Instragram, etc
* Update any web directory access – e.g. [National Health Directory](https://www.healthdirect.gov.au/australian-health-services), [QFinder](https://qfinder2.health.qld.gov.au/)
* Update online practice management software – e.g. [Practicehub](https://www.practicehub.com.au/)
* Update phone system login
* Update accrediting body login

# Human Resources

[ ] Advise staff/doctors of updated contact details – e.g. who staff contact when sick etc

[ ]  Payroll program updated – termination processed and all entitlements

[ ]  Online super clearing house access updated

[ ]  Keys

[ ]  Alarm codes

[ ]  Handover of HR information including contracts, recent documented employee conversations and any current issues

# Suppliers and contractors

[ ] Update major suppliers and contractors authorised contact details

* Phone/internet
* Electricity
* Online ordering accounts
* Security
* Insurers
* Workcover
* Cleaners
* Document destruction collection
* Clinical waste collection
* Sanitary collection
* Medical suppliers
* Plumber and electrician
* Builder
* Maintenance personnel
* Gardening personnel

# Policies and procedures

[ ] Update your policy and procedure manual as the PM is most likely listed as the personal responsible for a lot of things in there!

[ ] Checklists:

* Checklists for registrars
* Checklists for locums
* Checklist for administration meetings
* Checklist for clinical meetings
* Daily, weekly and monthly checklists (including manual Cat 4 data extract uploads if necessary)

[ ] Ordering

* Prescription paper
* Appointment cards and brochures
* Medical products
* Stationery

[ ] Equipment

* Maintenance schedule
* Supplier contact information

[ ] Staff education handover

* Education schedules for each staff member (CPR, Infection Control, Manual Handling etc)
* CPD points for all clinical staff

[ ] Quality Improvement

* PDSA cycles, Model for Improvements
* Pencs login and contact details
* [Pencs QI recipes](https://help.pencs.com.au/display/cr/cat%2Brecipes)
* [Benchmark reports](https://www.ourphn.org.au/benchmarking/)

[ ] Staff registration and insurance

* AHPRA
* Indemnity insurance

[ ] Managing staff performance

* Appraisal procedures
* Disciplinary process

[ ] Occupational Health and Safety

[ ] Risk Management

[ ] Staff immunisation

[ ] Marketing

[ ] [Health Event Calendar](https://www.health.qld.gov.au/news-events/events/event-calendar)

# Clinical

[ ] Medication management

* Storage and disposal or S4 and S8 drugs
* Doctor’s bag contents and ordering
* Management of sample drugs

[ ]  [Vaccine Management](https://www.health.gov.au/resources/publications/national-vaccine-storage-guidelines-strive-for-5)

[ ]  [Cenrtal Qld HealthPathways](http://cq.healthpathwayscommunity.org) access Username: uscentralqld Password: pwcentralqld

☐ [Sunshine Coast HealthPathways](https://sunshinecoast.communityhealthpathways.org/LoginFiles/Logon.aspx?ReturnUrl=%2f) access Username: usersc Password: pwsc

☐ [Wide Bay HealthPathways](https://widebay.communityhealthpathways.org/LoginFiles/Logon.aspx?ReturnUrl=%2f) access Username: userwb Password: pwwb

[ ]  [The Viewer (Health Provider Portal)](https://hpp.health.qld.gov.au/)

[ ]  Local specialist referral pathways

[ ]  Local referral pathways – allied health (excluding mental health)

[ ]  Local referral pathways – mental health care

[ ]  Telehealth referral pathways

[ ]  Authority scripts

[ ]  Chemist relations

[ ]  Residential aged care facility relations

[ ]  Radiology (e.g. [Queensland Diagnostic Imaging](https://www.qdi.com.au/), [IMED Radiology](https://i-med.com.au/home))

[ ]  Pathology (e.g. [QML](http://www.qml.com.au/), [Sullivan Nicolaides Pathology](https://www.snp.com.au/))

# Other

[ ]  Local PHN and HHS liaison officers – update contact details

[ ]  Accreditation body – update contact details

[ ]  Universities (for medical students and registrars) – update contact details

[ ]  Memberships – update contact details e.g. [AMAQ](https://qld.ama.com.au/), [AAPM](https://www.aapm.org.au/), [APNA](https://www.apna.asn.au/), etc

# Notes

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