MODULE FOUR

PROGRAM INFORMATION & MANAGEMENT

QUESTIONS ANSWERED

	WHAT	• **Are the major information requirements you need to be aware of?** • **Are the major types of information you need to pass on to registrars and others?**
	WHY	• **Is program information important?**
	WHEN	• **Are the critical time points for providing registrar information?**
	HOW	• **Is important information disseminated?**
	WHERE	• **Is important information located?**
	WHO	• **are the important members of the team for particular activities?**

MEs need to be aware of the sources of accurate and reliable information. The importance of communication and information management in RTPs and the particular role of MEs in this context are highlighted. Ability to use RTP on-line learning and information management systems is an essential set of skills. MEs need to be fully informed about RTP specific information management procedures, training policies and procedures, training standards and requirements in order to provide accurate training advice and guidance to registrars.

RTP INFORMATION AND MANAGEMENT SYSTEMS

RTPs are somewhat small but complex organisations because they:
- are governed as not-for-profit incorporated bodies
- possess a mixed culture of professional, educational and commercial aspirations
- employ geographically dispersed staff, registrars and stakeholders
- employ a large proportion of part-time professional staff
- have staff, directors and stakeholders who have multiple affiliations
- must comply with the policies, report to, and meet the standards of multiple authorities (GPET, RACGP, ACRRM)

Why do MEs need to know about RTP information management?

These features mean that there is an inherent risk of communication failure, miscommunication, inconsistent or conflicting information, and potential for break down in levels of trust. Consequently it is particularly important for RTPs to establish and maintain effective communication and information management procedures.

An often- quoted observation drawn from management literature is:
>   The most common complaint from staff is: "Nobody ever listens to me"
>   The second most common complaint from staff is: "Nobody ever tells me"

MEs have a vital role in this. Some of the ways they can assist are by ensuring that:
- program plans and educational activities are clearly documented
- requests for administrative support are timely and clear
- reports on registrar contacts, ECT visits, etc., are completed fully and submitted promptly
- accurate notes are kept of staff meetings, planning days, etc.
- proposals for change in policies and procedures are documented, supported by a convincing rationale and where relevant a budget

Setting the Benchmark for a Good Information Management System

"... as we know, there are known knowns;
there are things we know we know,
We also know there are known unknowns;
that is to say we know there are some things we do not know.
But there are also unknown unknowns
-- the ones we don't know we don't know."

Donald Rumsfeld

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The point of this anecdote is to underscore the importance of good organisational communication and information management. As they occupy one of the key roles in an RTP, MEs have a particular responsibility to ensure that they both understand and contribute to effective communication and information management in the organisation.

What are the key channels of communication for MEs?

The relevant elements of an RTP's information system of importance to MEs include:

- Communication and decision making processes between RTP Board, CEO and MEs
- Communication between the RTP office and individual MEs
- Communication between the RTP office and registrars
- Communication between the RTP office, MEs and supervisors and practices
- Communication between MEs and registrars
- Reporting to GPET about training activity
- Reporting to Colleges about individual registrar completion of training requirements
- Registrar records
- The RTPs electronic filing system

Communication and decision making processes between RTP Board, CEO and MEs
It is important that the new ME gain a clear understanding of these communication channels in order to be able to function effectively as a team member in her or his RTP.

The organisation chart of the RTP provides a good guide to the formal lines of communication.

Here is an example:
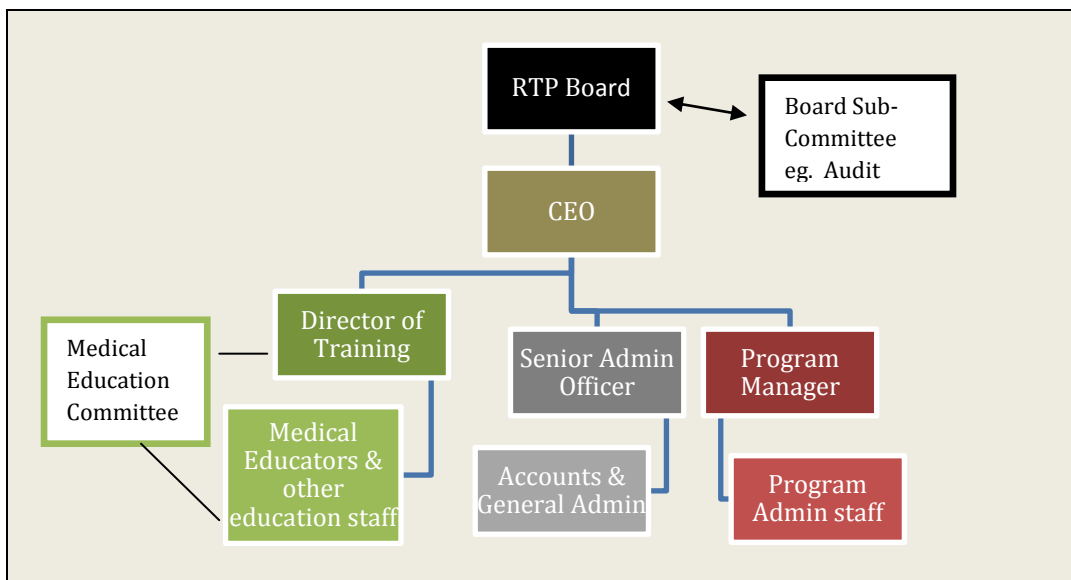
Activity 4.1

Who are You Talking To?

Consider what the organisation chart above tells you about communication and information sharing in this RTP.

Describe the formal accountabilities and reporting relationships.

Not counting the Board, describe the likely way in which the two committees would operate?

Contrast this chart with the organisation chart for your RTP. What are the strengths and weaknesses of each in terms of likely effectiveness in communication and information sharing.

When looking at the management structure of RTPs it is important to note that the Board is responsible for the governance of the RTP. This means setting the strategic directions and policies, approving the budget and monitoring the financial affairs of the RTP. Under law members of the Board are accountable for these matters. RTP Boards employ and delegate authority to the CEO to spend money within specified limits to achieve the Boards' objectives. Usually in an RTP, the CEO is the only officer with the authority to represent the official views of the organisation and to sign contracts on behalf of the organisation.

MEs do not normally have this level of authority. Consequently, although MEs may see policies which they feel could be improved, any proposed changes in policies, contractual agreements, etc ultimately need to be approved by the CEO and their Board.

Formal organisation charts hide the fact that staff and people in an RTP all talk with each other because usually they are pretty friendly places. Indeed it is essential that the informal communication channels are well and truly open so that people can work together with a minimum of fuss. Here's an incomplete listing of the many types of information sharing that occurs between different groups in RTPs.

Information sharing between the RTP office and individual MEs
This is likely to have the following features:
- Mostly done by email or telephone
- Types of information
    - Advice on GPET and RTP Board policies and procedures
    - Advice, agendas, notes regarding meetings

- Calendar of events and important dates
- Information about registrars, teaching attachments
- Queries about personal matters, eg pay, travel expenses
- Re organising events, workshops, catering, etc.
- Reports on registrars, training activities
- Requests for funding of proposed activities
- Requests for participation in activities
- Seeking input/comment on policies or proposals

Communication between the RTP office and registrars
This is likely to have the following features:
- Mostly done electronically via GPRime and/or email or telephone
- Types of information:
    - Advice re training requirements
    - Advice regarding entitlements for reimbursement of expenses, etc
    - Calendar of events and important dates
    - Evaluation feedback forms
    - Information and processing of allocation of registrars to practices
    - Information handbook
    - Newsletters, updates
    - Queries regarding policies and procedures
    - Queries regarding training status
    - Requests for funding for educational activities
    - RPL applications
    - Submission of expense claims
    - Submitting completed assessment tasks
    - Up-dating learning needs, learning portfolio, etc

Communication between MEs and registrars
This is likely to have the following features:
- Mostly done face to face, also via GPRime and/or email or telephone
- Types of information
    - Registrar contact visit/training advisor visit
    - ECT visits
    - Educational workshops or other meetings, eg sub-regional cluster meeting
    - Assessment activities

Communication between the RTP office, MEs and supervisors/practices
This is likely to have the following features:
- Mostly done via GPRime, email or telephone
- Types of information
    - Re supervisor workshops
    - Re teaching practice accreditation
    - Submission of claim forms for practice payments
    - Practice agreements
    - Submission of supervisor reports

      -     Information re individual registrars

Other matters

The RTP office must also ensure that it has effective information management processes in place to:

- Report to GPET about training activity, contract performance and use of funding
- Report in accordance with statutory obligations regarding taxation, financial and governance matters
- Report to Colleges about individual registrar completion of training requirements, accreditation of teaching practices, etc.

The critical point is that the RTP office is the repository of all information on file for Board governance matters, strategic plans, policies and procedures, staff, registrars, program management and general coordination of the RTP activities.

For these reasons it is imperative that the RTP maintains accurate and registrar records and more generally that its filing system enables information related to all facets of the RTPs activities to be accessed and retrieved efficiently and effectively.

Information Management

ON-LINE LEARNING AND REGISTRAR INFORMATION MANAGEMENT

As mentioned in Section 1, most RTPs manage their information for administrative and educational purposes electronically. However they vary in the extent to which they use their on-line learning and registrar information systems for some or all of these elements.

What are the basic features of on-line learning and information management systems used by MEs?

Some RTPs may rely more or less exclusively on their on-line learning and information system for all of the above forms of communication; however most are likely to have a hybrid system.

Many RTPs use GPRime so we will use this as an example here. (AMEN also uses GPRime as a platform for communication and information sharing and this is open to all MEs.)

GPRime is a web-based system for group communication and educational data management. This includes

- All communication and document sharing for planned educational events and meetings.
- Documentation of educational requirements and documentation of completion of these requirements.
- Web based submission forms for reports and feedback
- Individual learning planners and learning needs analysis tools
- Registrar portfolio of completed learning activities
- Links to quality GP educational sites
- Educational resource sharing
- Group bulk emailing

While it is the registrars responsibility to ensure that their learning plans and learning portfolios are up-to-date, MEs need to be able to use all these features effectively to assist registrars and ensure that they are making satisfactory progress in completing training requirements.

Individual RTPs have customized GPRime to suite their particular needs; however they are all likely to have User's Guides and reasonably straight forward screen instructions and links.

The following activity will give you some practice in using a GPRime based on-line learning system.

Activity 4.2

Getting into On-Line Learning Management

Try out the following procedures:

LOG IN
- either via RTP webpage or direct
- username
- password (from RTP administrator)

HOME PAGE
- Check out menu options
- Check out links
- Tryout other features

LEARNING PLANS
- Open registrar learning plans
- Create new learning need for individual registrars
- View existing learning needs

LEARNING PORTFOLIOS
- View completed activities
- Viewing and editing submitted reports
- Updating attendance and other documentation of activities
- Viewing and working with other logged activity data

TRAINING POSTS
- View profiles
- Submitting notes and comments
- Viewing submitted reports

OTHER COMPONENTS
- Planning Registrar workshops
- Planning Supervisor workshops
- Forms and documents
- Contacts and links

THE REGISTRAR CONTACT MEETING

One of the most important methods by which MEs share information with registrars is through registrar contact meetings. These may be described as training advisor visits or may go by some other name; however no matter what they are called they should occur regularly during training. The RACGP standard is that registrar contact meetings are to occur at least once per semester.

How do I undertake a registrar contact/training advisor meeting?

RTPs vary in the way they organise registrar contact meetings. Some conduct the meetings at their offices, whereas others meet at the registrar' current training attachment. As you can see we have hedged our bets on the name too, because RTPs use different names for it. Some RTPs link up the registrar contact meeting with an ECTV. Some RTPs also use the opportunity to meet with the GP supervisor. A part of the visit time may be also set aside for a 3 way meeting between the ME, the supervisor and the registrar. So you will need to inform yourself about the specific arrangements in your RTP. Also, when you look at *Tool 4.2: Training Advisor Visit Report Form* bear in mind that your RTP may do things a little differently and therefore the form would need to be adapted if you were considering using it.

Activity 4.3

We Need Contact

Assume you are about to have your first registrar contact/training advisor meeting. Consider what you need to do to get ready for the meeting. Once you have done this refer to *Tool 4.1: Doing Your First Training Advisor/Registrar Contact Meeting.* When you come to do your first actual meeting check back to *Tool 4.1* again to refresh your memory.

Now imagine that you have just met with the registrar and then subsequently with the supervisor.

What if...?
The registrar identified an issue of concern to her about the supervisor, eg. The registrar feels she is consistently not getting the required in-practice teaching time and when she asks for guidance on particular cases the supervisor has been too dismissive in his explanations.

The supervisor expresses a serious concern about the registrar, eg. The registrar is consistently late and he has strong reservations about her competence because of a number of misdiagnoses.

Discuss this "What if ..?" scenario with your ME colleagues to get a better understanding of how they would manage this situation and the RTP procedures for dealing with complaints and grievances.

Here is a description of the requirement as found in one RTP's Handbook:

Training Advisor Meetings

Registrars must submit evidence of planned learning with review and reflection at 6 monthly intervals during training.

The GP registrar is required to meet with her or his Training Advisor at least once per semester. The designated Training Advisor takes the particular role of providing overall advice and guidance to the GP registrar about their learning needs, plans and goals and the training and educational activities they should undertake. The Training Advisor approves the initial learning plan and ensures that the plan and learning portfolio are reviewed and learning plans updated if necessary at least once each semester. The designated Training Advisor also reviews the GP registrar learning plan and learning portfolio at the end of training, as the basis for making a recommendation on satisfactory completion of requirements

> After each six-monthly visit, the Training Advisor is required to submit an iForm on GPRime, documenting the discussions held throughout the visit. Once the report is submitted and approved by an administrator, a copy of the report is viewable in the appropriate section of the Registrar's GPRime portfolio.

Here's a summary version of an RTP's Training Advisor contact form. Most RTPs will have a form to be completed as a report on contact visit. In many RTPs it will be an electronic form accessed through GPRime or their on-line learning system. Such forms allow for more extended responses with drop down boxes.

We noted above that a meeting with the GP supervisor could also be incorporated into the visit. The above form includes provision for this.

It could be useful to make reference to the Practice Agreement where questions arise about the responsibilities of the registrar, the practice and the RTP.

However, you need to bear in mind that the Practice Agreement is a contract between the RTP and the Practice and that as a general rule the only RTP officer who is authorised to sign contracts is the CEO. This means that the ME has no authority to amend or represent that something should be changed in the contract directly to the practice.

POLICIES AND PROCEDURES

For registrars, apart from their supervisors who they see on a day by day basis, MEs are the most visible face of the GP training program offered by each RTP. As such registrars are likely to seek information from MEs on all sorts of matters to do with their training and the way the RTP

operates. Most RTPs have lots of this type of information on their web-sites; however often it is comforting to registrars to get a query answered quickly (provided that the answer is accurate and clear!).

If the ME is unsure of the answer, then the next most comforting thing for the registrar is for the ME to respond that he or she is unsure and to suggest where the answer can be found or to take the question on notice and follow up with a response.

Nevertheless a sound working knowledge of the key policies and procedures governing training is highly desirable for MEs to possess because it is adds to their credibility and reputation as an authoritative source of advice.

What are the most frequently asked questions about RTP policies and procedures?

Registrars (and others) ask a lot of questions about policies and procedures (surprise, surprise!) and as an ME it often falls to you to answer them. To give you an idea of the fairly comprehensive spread of policies and procedures an RTP may have refer to *Tool 4.3: Typical RTP Policies and Procedures*

Activity 4.4

Getting to Know Your Policies and Procedures

Recently a group of experienced MEs was asked what policy areas registrars mostly asked questions about.

To see how this works in your RTP, you are asked to informally survey your colleagues (both MEs and office staff) to identify the policy areas which registrars most frequently ask questions about in your RTP.

Refer to *Tool 4.2: Typical RTP Policies and Procedures* to complete this activity. Use the middle column to tally the results. Use the right hand column to note the points you would make in answering the question. Then make sure you check the source documents to ensure your answer is accurate.

Finally, you may like to check the rest of the list of policy areas with a view to becoming more informed about them.

PUTTING IT ALL TOGETHER

One of the annual tasks that MEs usually get involved in is the New Registrar Information Session. This happens soon after the process of selection of the intake for the following year is finalised for your RTP. It is likely to be the first time that the new registrars come together as a group. Almost certainly they will be desperate to get as much information as they can; however one of the challenges is to focus on the information they will need straight away rather than overload them too quickly.

What are the main sources of information?

In Module 1 of this package, it was suggested that you peruse various documents and internet sites to give you an overview about the structure of GP training. To refresh your memory here they are again:

Websites:

- The AGPT website: http://www.agpt.com.au/
- The RACGP website: http://www.racgp.org.au/
- The ACRRM website: http://www.acrrm.org.au/
- Your RTP website.

Documents (most can be found on the above websites):

- the AGPT Guide for Registrars (annual publication)
- the AGPT Handbook (annual publication)
- the GPRA Registrar Guide (annual publication)
- RTP handbook, policy documents, practice agreement
- AGPT Policies
- *RACGP Standards for general practice vocational training:*
    - Standards for General Practice Education and Training: Programs and Providers 2005.
    - Standards for General Practice Education and Training: Trainers and Training Posts 2005.
    - Curriculum for Australian General Practice
    - Overview for Registrars – Fellowship in Advanced Rural General Practice
- *ACRRM vocational training documents:*
    - Vocational Training Handbook
    - Primary Curriculum (Part 1)
    - Primary Curriculum (Part 2) – Curriculum Statements
    - Standards for Teaching Posts and Teachers in Rural and Remote Medicine
    - Assessment Program Brochure

Activity 4.5

Scenario: Hungry for Information

You were allocated the job of meeting with a group of doctors who have recently been selected for GP training in your RTP. The purpose of this meeting was to explain to them in appropriate detail what is in store for them and what they must do as preparation for commencement in the following year.

The structure of the one hour session was set as 30 minutes for you to make a presentation about their forthcoming training. You prepared and delivered a powerpoint slide show for this session. They were all very attentive and appeared to understand what you were saying.

In the second half of the session you invited questions and this seemed to open a pandora's box!

- Do I have to do more hospital training or can I go straight into a GP attachment?
- Can I get my previous hospital experience recognised and if so how?
- What do I have to do to complete my training?
- When can I sit the College exam and what is involved?
- Who sets down the terms and conditions when I am sent to a GP attachment? What can I expect to get in terms of supervision, teaching time and support?
- What are the things I have to do to complete my training?
- Can I do training in areas which I have a special interest in?
- What is a learning plan and a learning portfolio and why do I have to do them?
- You said there was a regular program of educational workshops run by the RTP but how are they organised, do they follow a curriculum and what do we have to do in these sessions?
- Who do I go to if I have a problem?

You were a bit surprised about the large amount of questioning – you thought you had covered some of this information in your presentation. However you valiantly tried to answer the questions as succinctly and accurately as possible.

What were your answers?
Next time you run this session what would you do differently?

Let's imagine that you decide next time to supplement the session you provide with a take home presentation for the new registrars which they can work through themselves. Refer to the link below and work through it yourself!

ME choose your own adventure.ppt

WHAT THIS MODULE HOPES IT HAS HELPED YOU DO

What Have You Done???!!!

Use the following list to check off whether these things have worked for you:

You should:

- Have a better understanding of the RTPs information management systems and their importance
- Be more informed about the types of information you need to know and be able to pass on to registrars
- The main ways of communication and sharing information with registrars
- How to find information when you need it and who the key people are to contact when needed
- How to carry out a registrar contact meeting
- How to use an on-line learning and information management system such as GPRime

If you agree that you have achieved these outcomes give yourself a tick or a hug.

If you disagree maybe you have some thoughts on how this section could be improved.

Whether you agreed or disagreed any feedback you have would be welcome.

You could post this feedback through AMEN's GPRime website.

TOOLS OF TRADE

Tool 4.1

Doing Your First Training Advisor/Registrar Contact Meeting

Steps involved in undertaking your first registrar contact meeting:	CHECK
Preparation	
Suggested initial steps 1. Peruse your RTPs policies and procedures regarding registrar contact meetings 2. Discuss the steps below with a senior ME 3. Optional : sit in with another ME conducting a Training contact or view a role play of a TA contact	
Preparing for the visit 1. Find the registrar's file 2. Review the file 3. Identify the registrar's stage of training 4. Find out how your RTP requires the contact meeting to be recorded, who will be able view the report and how 5. Familiarise yourself with the structure and use of the learning plan in your RTP 6. Check schedule of contact visits your RTP office may have organised 7. Making contact with the practice and registrar as a matter of courtesy and to arrange details of meeting)	

Conducting the meeting itself

The approach used during the meeting may vary according to circumstances and the information required on the RTPs report form; however the following points need to be covered.

a) Setting the scene/establishing rapport, explaining the purpose

b) Confirm past training

c) Review of current term

- Teaching time
- Clinical load/exposure
- Supervision
- Orientation
- General registrar well-being: may include accommodation, family, are they coping, support needs
- Employment conditions

d) Review of learning plan use – up-dating learning needs, short term and long term goals

e) Stock take of progress through training
- Review of learning portfolio
- fulfillment of training requirements
- any outstanding RPL applications
- participation in workshops, educational activities
- assessment matters

f) Planning for next term

g) Other matters

Tool 4.2

Training Advisor Visit Report Form:

TRAINING DETAILS

GP Registrar		GP Supervisor/Practice	
Visitor/advisor	Term		Date

WITH THE GP REGISTRAR

Feedback from the registrar about recently/nearly completed training attachment	
Feedback obtained from Supervisor(s) or Reports (if Hospital Term)	
Mentor/TA comment on review of completion of learning plan, portfolio and log book	
Discussion with registrar about future attachment and particular issues/needs to be addressed	
Registrar comment on the Training Program as a whole	
Evidence of attendance at Hospital Educational sessions (if Hospital Term)	
Other matters for discussion, eg. Workshop Attendance Progress of RPL Application, Planning for Completion of Training Requirements	

WITH THE GP SUPERVISOR

Comments on GP registrar progress (learning plan/portfolio/other educational requirements/program)	

SPECIFIC FOLLOW UP ACTIONS

Action	
By Whom	

Tool 4.3

Typical RTP Policies and Procedures Checklist

Registrars (and others) ask a lot of questions about policies and procedures (surprise, surprise!) and as an ME it often falls to you to answer them. The left hand column lists the policies in alphabetic order from the contents page of an RTP's policy and procedures manual.

The middle column allows you to tally the number of times questions are asked about particular policies or procedures.

The right hand column provides space for you to note the points you would make in answering questions about each policy area, taking care to check the source documents so that your answer is accurate.

POLICY AREA	HOW OFTEN ASKED ABOUT	WHAT YOUR ANSWER
Aboriginal health training requirement		
Accommodation subsidies		
Advanced skills training		
Appeals process		
ACRRM training and assessment requirements		
Complaints and grievances		
Completion of training requirements		
Communication with stakeholders		
Confidentiality		
Education Workshop/Release Program		
Enrolment/Re-enrolment		

ECT visits		
Extended skills training		
Extension awaiting Fellowship		
Feedback on teaching attachments		
Fellowship - ACRRM		
Fellowship - RACGP		
Financial assistance – support available		
GP supervisor – absence from practice		
GP supervisor workshops		
GP term requirements		
Harassment		
Hospital training requirements		
Incentives for rural training		
Information management		
Learning plans		
Learning portfolios		
Mandatory assessment requirements		
Media communication		
Practice accreditation & re-accreditation		
Practice agreements		
Practice match		
Privacy		

Process for registrars prior to starting GP posts		
Process for obtaining provider and prescriber names		
Quality Assurance and Evaluation		
RACGP examination requirements		
Registrar –patient workload		
Registrar safety		
Remediation		
Reimbursement of expenses		
RPL		
Supervisor reports		
Teaching time in practice		
Terms and conditions of employment in practices		
Training advisor/registrar contact meetings		
Training pathways		
Training in two GP attachments		
Transition from training to vocational recognition		
Vertical integration		
Worksafe and duty of care		