

The Practice Toolkit: A practice management manual for all BC GPs

A new tool developed by Divisions of Family Practice will help GPs around the province better manage their medical practices. The Practice Toolkit, a fully customizable resource built to suit clinics of all sizes, contains sample documents such as clinician contracts, confidentiality agreements, and facility checklists, as well as policies on workplace safety, privacy and confidentiality, and employee conduct.

The Divisions produced the Practice Toolkit based on a model originally created by the West Coast Family Medical Clinic in Sooke. West Coast Family Medical was formed when two clinics merged into one practice. During that merge the physicians decided to create a comprehensive office manual to streamline processes. The clinic sought direction and project management assistance from the South Island Division of Family Practice, and the Division applied for funding from the Divisions Innovation Fund, a program that supports the implementation of strategies to improve delivery of primary care.

Divisions that receive funding through the Innovation Fund are encouraged to share what they have learned and resources from their projects, and once the Practice Toolkit was shared on the South Island Division website it was recognized as a valuable resource by clinics throughout the region. Since 2012 the toolkit has been tested and used by many practices in Victoria and the South Island, as well as others around the province.

This year the provincial Divisions office expanded the Practice Toolkit

and is now providing an online version on the provincial Divisions of Family Practice website. A downloadable Microsoft Word version of the toolkit is also available, accompanied by an editing guide that clinics can use to create their own customized clinic manual. The expanded toolkit incorporates forms, contracts, and other documents developed by other divisions outside of Victoria and

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the South Island (e.g., sample locum contracts developed by Chilliwack, Fraser Northwest, and Comox Valley Divisions of Family Practice). This process of incorporating resources from divisions around the province is an excellent example of the efficiencies that can be achieved through collaboration and information sharing.

As part of the PDSA (plan-do-study-act) quality improvement process, the toolkit will be frequently updated as feedback from users is implemented and revisions are made to policies and processes. These updates will be made by the Divisions of Family Practice provincial

office, and clinics that have chosen to download and customize the Word document will be able to keep their guide current by accessing the revised forms and documents through the links provided in their customized toolkit document.

The online toolkit provides a feedback form for comments, and visitors can view a log that will note the latest updates to the manual. Users can also request update notifications to ensure they are always using the most recent versions of all documents.

While there is no legal requirement for clinics to use an operations manual like the Practice Toolkit, the value of having policies and processes in place can't be overstated. The content in the Practice Toolkit can help clinics comply with employment and privacy law, keep abreast of new CMA and College of Physicians and Surgeons of BC guidelines, and keep EMRs and other documents organized and up to date to improve efficiency in the event of an audit. The sample forms, agreements, and contracts are based on best practices that have been tried and tested by many different practices, and accessing them can save clinics time and money by eliminating the need to track down and gather this information from outside consultants.

GPs around the province are invited to review the toolkit by visiting <https://divisionsbc.ca/provincial/practicetoolkit>, and to make use of any resources they feel might improve processes and procedures in their practice. Questions and comments about the toolkit can be e-mailed to webmaster@divisionsbc.ca.

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This article is the opinion of the GPSC and has not been peer reviewed by the BCMJ Editorial Board.