General Practice Smart Referrals (GPSR)

WM Health Staff Check list

GP Practice Name	
Practice Software	
Trainee Name	
Trainee Position	
Trainers Name	
Position: AO/ CN	
Training Date	

Action	Yes	No	Comments
Appointment booked with Practice Manager			
Email confirmation sent with test patient information page			
Book car			
Prepare appropriate training materials			
COVID-19 Risk assessment performed with Practice Manager:			
Appropriate individual room with Physical distancing available			
Confirm number of participants and room size is no more than one person per four square metres			
PM office available immediately upon arrival?			
Have any infectious patients isolated in this room?			
Hand washing/sanitiser available (Staff take own also)			
Best time for visit AM/PM	**AM**	**PM**	(i.e. No respiratory clinics/slow period)
Call PM day prior/ day of appointment to confirm all participants in training are asymptomatic			

Training Module Proficiency

GPSR Training Module		Step Completed	Function Understood
Action	**Steps**	**Y/N**	**Y/N**
Select a test patient and Launch Smart Referrals	Best Practice		
	Medical Director		
Referral Information	Enter Priority/Routine		
	Enter Referral length		
Referral Recipient	Select service/location		
	Select Specialist name		
Condition Specific information	Enter a CPC condition		
	Enter a non-CPC condition		
Standard clinical information	Complete information		
Patient information	Ensure patient demographics completed		
Insurance information	Check information		
Referring GP's Information	Check information correct		
Attachments	Attach a file from Clinical Software		
	Attach a file from Computer		
Check for missing fields			
Referral control buttons	Submit a referral		
	Park a referral		
	Resume a referral		
	Cancel a referral		
	Update a referral and refresh		
Launch HealthPathways			
View Referral PDF in clinical Software	Best Practice		
	Medical Director		
Troubleshooting and Downtime information, and user guides given			N/A