TIPS FIRST 100 DAYS

My Patient Services Survival Guide

Your personal desk-side reference for the things you are learning about your own practice.

You do not need to remember everything.
You need to know what to check, where to find it and who to ask.

My name	My practice	My manager / supervisor

How to use this guide

Add the local information that helps you work safely and confidently. Keep entries short and practical. Update them as you learn and whenever local arrangements change. This guide supports learning; it does not replace current practice policies, SOPs, authorised guidance or appropriate clinical/managerial advice.

SECURITY RULE - NEVER WRITE CREDENTIALS HERE.
Do not record passwords, PINs, smartcard passcodes, authentication codes, security answers or other access credentials in this guide.

PEOPLE Who can help?	PRACTICE What is our local process?	POTENTIAL What do I need to learn next?

People I may need quickly

Role / purpose	Name / team	How I contact / find them
Manager / duty manager		
Patient Services / reception lead		
Duty / on-call clinician		
Safeguarding lead / route		
IG / confidentiality support		
IT / system support		
Other essential contact		

Systems I use

System	What I use it for	Where I find help / guidance
Patient record / clinical system		
Telephone / messaging		
Online consultation / request system		
Document / workflow system		
Training / policy system		
Other		

REMEMBER: system names and support routes belong here - passwords and authentication details do not.

Build your own glossary

General practice has a language of its own. Record what terms mean in your local context. If an abbreviation is unclear, ask rather than assume.

Term / abbreviation	What it means here	What I need to know / who explained it
PCN		
HCA		
ANP / ACP		
ARRS		
2WW / urgent suspected cancer		
DN / community nursing		
OOH / NHS 111		
IG		
SOP		
Other local abbreviation		
Other local abbreviation		
Other local abbreviation		

A term I heard today and need to check:

Record the local route, not a universal answer

These processes vary between practices. Capture the authorised local route and the point at which you should stop and ask for help.

Request	Usual local route	What must I check?	When / to whom do I escalate?
Appointments / care navigation			
Prescription / medication requests			
Test results			
Referrals			
Home visit requests			
Online requests			

CARE NAVIGATION IS NOT CLINICAL JUDGEMENT.
Work within your role, training, local protocols and authorised pathways. If patient safety is uncertain, stop, ask and escalate.

Closing the loop matters

For each process, understand where it goes, what you are responsible for and how you know the work has reached the right place.

Request / issue	Usual local route	What is my responsibility?	How do I know it is safely handed over?
Incoming documents / correspondence			
Tasks / internal messages			
Registration / patient details			
Medical records / access requests			
Complaints / dissatisfaction			
Incidents / mistakes			
Other recurring process			

A process I want somebody to show me again:

Your quick escalation reminders

Situation	My local first step	Who / what do I escalate to?
Patient is very upset or distressed		
Patient becomes angry		
Abusive / threatening behaviour		
Possible safeguarding concern		
Something sounds clinically urgent		
Confidentiality / identity concern		
I notice a possible error		
I make a mistake		
I feel overloaded / unsafe to continue		
I simply do not know		

PROFESSIONAL PAUSE	STOP Do not rush.	CHECK What do I know?	ACT Safely and within role.

Useful professional language

These are prompts, not scripts. Adapt your language naturally and follow local procedures.

Situation	A helpful starting phrase
When I need to check	"I want to make sure I give you the right information, so I'm going to check that."
When I cannot make a clinical judgement	"I can't safely make that clinical decision, but I can help you with the next appropriate step."
When I need support	"I'm not certain about this, so I'm going to ask a colleague before I proceed."
When acknowledging concern	"I can hear that this has been frustrating / worrying for you."
When setting a boundary	"I want to help, but I need us to speak respectfully so that I can do that."
When owning an error	"I think something may have gone wrong. I'm going to raise it now so we can make it safe."

My own phrases that work well

A phrase that helps me explain what can happen next:

A phrase that helps me stay professional under pressure:

A phrase a colleague uses that I would like to remember:

Make uncertainty visible

Professional confidence is not pretending to know. Use this page for subjects where you know you must check the current local process or ask the appropriate person.

	I must check / ask before acting when...
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

My three safest habits

1.	
2.	
3.	

IF SOMETHING DOES NOT FEEL RIGHT:
Do not guess. Do not work beyond your role. Check the current local process and involve the appropriate colleague.

MY QUICK REFERENCE | **KEEP LEARNING**

What I want at my fingertips

Useful local number / contact	
Useful local number / contact	
Useful local number / contact	
Website / resource I use often	
Policy / SOP I need often	
System help route	

Something I learned this week that will make tomorrow easier:

Something I still want somebody to explain:

One thing I am becoming more confident about:

PEOPLE Ask.	PRACTICE Check.	POTENTIAL Learn.

THIS GUIDE SHOULD BECOME LESS IMPORTANT AS YOUR CONFIDENCE GROWS.
Keep it current while you need it. Keep asking while you are learning. Never let familiarity replace safe checking.