

INDIAN ASSOCIATION OF PALLIATIVE CARE

DOCUMENTATION PROCESS

STANDARD OPERATING PROCEDURE: IX

“Documentation is the bridge between confusion and clarity.”

INTRODUCTION

1. Ours is a pan India Association being managed by members of Executive Committee from all over India with a limited period of a few years in the office. The IAPC changes its Core Committee, EC Members periodically as per Bylaws; hence the strict requirement of correct book keeping and written handing/taking over of duties.

2. Transitioning and handing over key position responsibilities is a critical process for talent management and succession planning. It ensures continuity, knowledge transfer, and smooth transitions for both the outgoing and incoming members of Executive Committee in IAPC. This SOP gives out guidelines as to how a smooth handing/taking over can take place between outgoing and incoming key position holders. The word “Association” will mean IAPC in this SOP.

DOCUMENTATION IN IAPC

3. Documentation is a comprehensive process of creating, managing, and preserving records encapsulating information, procedures, or events. It systematically records data in various formats, from traditional paper-based documents to contemporary digital files. Documentation serves a multifaceted role, acting as a repository of knowledge, a means of communication, and a tool for ensuring accountability and transparency. Documentation is critical for conveying instructions, sharing insights, and maintaining a historical record in diverse fields such as healthcare, education, and technology. It provides a structured framework for organizing information, facilitating collaboration, and aiding decision-making processes.

4. As technology advances, documentation has adapted to include electronic formats, allowing for greater accessibility, ease of editing, and efficient information sharing. Whether in written reports, digital manuals, or multimedia presentations; documentation remains indispensable in preserving, communicating, and advancing our collective understanding in an ever-evolving and interconnected world.

5. What is the importance of maintaining and preserving the “Patients Records” in Hospitals? The answer is: extremely important; exactly, the same way here in any registered Association; we need to give paramount importance to safe Bookkeeping. It is obligatory as per the Finance Act of 2022. It can be digital as well as paper records; the principal is accuracy and easy accessibility. Digital Accounting is excellent; however, some of the important documents need to be converted into Paper Prints for efficient administration:

- a. **Fiscal Records:** Specified books of accounts to be preserved for a period of 6 years from the end of the relevant Assessment Year i.e. for a total period of 8 previous years. Most important are the Annual Audit Reports and Tax Returns.
- b. **Membership Records:** We have some anomalies in our membership records; we need to find reasons and resolve them.
- c. **Historical Perspective:** We need to maintain the correct documented History of IAPC from its inception i.e. 1994. History of IAPC inspires us; **the journey from Anaesthesia to Pain Management and finally to Palliative Medicine is fascinating.** It was not an easy path for our predecessors to get recognized as one of the main Medical Disciplines in India.
- d. **Nature of IAPC:** Ours is a pan India Association being managed by Executive Committee members from all over India with a limited period of a few years in office. Therefore, the strict requirement of correct book keeping and its preservation.

WRITTEN HANDING/TAKING OVER PROCESS IN IAPC

6. Handovers are an important management process that should not be overlooked. In our Association, when the tenure is over, people leave and new Office Bearer takes over. Therefore, it is essential to ensure a smooth hand/take over process and that guarantees that business of IAPC can continue with minimum disruption. This process should be done between Office Bearers in writing.

7. Although it is the existing position holder who will write up their handover notes, it is ultimately President's responsibility to oversee the handover process and ensure that the role is covered sufficiently. This is particularly important if a role is being taken over by a new member of IAPC, who will be unfamiliar with the organizational management in general. Clear, detailed notes that fully outline any processes and procedures will help the incoming member of staff settle in and get to grips with the job more quickly.

8. Where handovers take place in an Association, knowing who is personally accountable for what is vital. Where the handover process is badly done, there is the risk that past office bearer will leave without passing on vital knowledge and experience so it's something that organisations need to get right.

9. **The President:** He or she must handover the following points in writing:

- a. Report on Ongoing Academic Courses
- b. Collaboration with Other Indian Organisations
- c. Collaboration with Other Foreign Establishments.
- d. Work Process of Secretariat and their Selection, Salaries and Work Distribution etc.
- e. Custody of Important Documents like Original Bylaws, Registration Certificates etc.
- f. Any other ongoing points.

10. **The Hon Secretary:** He or she must handover the following points in writing:

- a. Up-to-date Membership Register
- b. Records of Minutes of Meetings of Executive Committee, GB Meetings etc.
- c. Attendance Register of all the Meetings with Signatures.
- d. Detailed information of State/UT Chapters
- e. Any other ongoing points.

11. The Treasurer: He or she must handover the following points in writing:

- a. The Complete Records of Finances to include Audit Reports, Monthly Records of Expenses and Invoices etc.
- b. Digital Record of Financial Transactions
- c. Correct and Timely Bank Account Transfer
- d. Any other ongoing points

12. The Regional Representatives: He or she must handover the following points in writing:

- a. State Chapters falling in the respective Region
- b. Conduct of Palliative Care workshops in the respective Region
- c. To create and develop regional leadership

13. The Representative from Ahmadabad: Should handover all the details and documents related with CA and the Office of Charity Commissioner.

REVIEW AND AMENDMENTS

14. The SOP will be reviewed by the Executive Committee of the IAPC every 3 years or earlier if so required, to ensure relevance and effectiveness; proposed changes may be initiated and amended by the Executive Committee of the IAPC.

CONCLUSION

15. Documentation is a vital part of any Association. It provides a roadmap for success, a bridge between present and future, and a tool to help others learn and understand. Without documentation, knowledge remains scattered and untapped.

16. In the world of technology and innovation, documentation plays an even more crucial role. Coding, software development, and system implementation all require clear and concise documentation to ensure effective collaboration and problem solving. However, it should be remembered that some of the important documents need to be in print form.

17. In summary, Organizational documentation is used to document the formal structure, operational and administrative procedures and processes, strategic planning, record-keeping and compliance, and policies and procedures of the organization.

“Documentation is the gift you give to your future self and your team.”

