THE IMPORTANCE OF A COMPREHENSIVE SEQUENTIAL ORIENTATION PROCESS:

Preparing New Clinical Staff for the Challenges of Home Care in 2015

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“Hospitals are but an intermediate stage of civilization [sic]... the ultimate objective is to nurse all sick at home”

Florence Nightingale
The Times London, April 14, 1876

Objectives

• Understand the importance of why a homecare agency needs a formal and consistent orientation program in preparing new clinical staff.
• Discuss examples of Resources available to support the Orientation Program.
• Understand the importance of forging a Staff/Agency Partnership from Day One.
• Describe the components of a Sequential, Comprehensive Orientation Program to develop and retain Staff.
Why does a home care agency need a formal orientation program?

- Guarantee that all orientees are provided with the same foundational information
- Guarantee consistency in education and training using evidenced-based best practices
- Establish a culture of accountability and community between the agency and the new employee

Who are you Orienting?

- Registered Nurses
- Licensed Practical Nurses
- Physical Therapists
- Occupational Therapists
- Speech Therapists
- Home Health Aides
- Social Workers

Where do they come from?

- Other Home Health Agencies
- Hospitals
- Long Term and Short Term Skilled Nursing Facilities
- Other Hospice Agencies
- Doctor’s Offices
- Rehabilitation Centers or Outpatient Clinics
- Returning to the work force
Issues new hires may not understand about home care

- Easier than previous work experience
- Not understanding current acuity in the home care population
- Complexity of procedures done in home: wound care, wound vacs, pleurex catheters, infusion therapy
- Depth of assessment skills needed
- Overall case management accountability
- Travel, weather and time management challenges

Past is Prologue

Looking at the Past helps you Plan for the Future

- Bringing together Orientation stakeholders
- Identify Outdated Orientation components
- Identify Needs of New Staff for Preparation for Home Care in 2015 and beyond
- Identify and Keep things in the Current Orientation Program that work well

Stakeholders

New Orientation Work Group

- Agency Executive Director
- Director of Quality and Performance Improvement
- Interdisciplinary Team Clinical Managers
- Documentation Specialist
- Special Projects Manager
- Clinical Staff Representatives: Nursing and Rehabilitation
- Human Resources Manager
- Assistant to Executive Director
- Corporate Compliance Officer
Identify Outdated Orientation Components

- Review of ALL documents utilized in previous Orientation Process
- Remove all outdated Regulatory, Policy and Procedure documents
- Replace with most current documents
- Develop Discipline Specific Documents for all Clinical New hires

Identify and Keep things in the Current Orientation Program that work well.

- Red Carpet Welcome
- Introduction and sit down meeting with all office staff
- First week Home Care visits with Preceptor
- Weekly progress outline for 12 week Orientation period
- Clinical Manager support and guidance

Identify New Staff Needs in Preparation for Home Care in 2015 and Beyond...

- Current and Accessible Home Care Specific educational resources
- Current and Accessible Home Care Specific Procedures and Competency Documents
- Agency Specific Software Education
- OASIS Documentation Education
- Home Care Specific Education in CMS Rules and Guidelines
- Prepared Preceptors
- Designated orientation program manager-someone who takes ownership of the program overall
Orientation Program Components

- Program specific documents in discipline specific format
  - Homecare vs Hospice
  - Differentiation of discipline roles - RNs, LPNs, Therapists, Aides
- Guidance for the Orientation/Onboarding Process for New Employees
- Clinical Orientation Program Booklet
- Preceptor Orientation Checklist
- Skilled Nursing Checklist - self assessment
- Clinical Competencies Checklist
- Preceptor Orientation Program... work in progress
- Development of Manager of Education and Documentation role with oversight responsibility for all new clinical staff

Clinical Orientation Program Booklet

- Clinical Orientation Booklet defines and outlines Goals and Tasks accomplished in a Weekly Sequential Format over the twelve week Orientation period
- Clinical Orientation Booklet includes documentation of completion of specific tasks, signed off by preceptor and orientee and monitored by designated Orientation Program Manager

Components of Orientation Weekly Checklist

- Components of Each Orientation Weekly Checklist may include some or all of the following:
  - Manager/Preceptor/Orientee Meetings
  - Homecare patient assignment progression/observation through independence
  - Scheduled meetings with office staff
  - Assigned interactive web-based learning modules
  - Skills & competency evaluation
  - Software documentation training with Preceptor and Educator
**Example: Week 1 Orientation Booklet**

**Current and Accessible Home Care Specific Resources**

- **Home Care Institute**
  - Web-based interactive education resource
  - Industry specific Educational Modules
  - Provides:
    - Ready made Patient & Family Teaching Tools
    - Ready made Staff Education Tools
  - Easily accessible to staff.

- **BRIGGS: Clinical Procedure Manual**
  - Includes:
    - Step-by-step clinical procedures specific to homecare & hospice
    - Competency Testing and Clinical Skills Checklist
  - Easily accessible to staff
  - Hard copy manual in office & on server for anytime electronic access

**Why the Weekly Sequential Format is Important**

- Learning is presented beginning with FOUNDATIONAL information
- **WEEKLY FORMAT:**
  - Prevents the Orientee being overwhelmed with too much information
  - Allows for better control and oversight of the Orientation Process
- Weekly format allows for ongoing Preceptor, Educator, Clinical Manager and Orientee identification of Orientee strengths and learning needs
How the Orientation Program Fosters the Employee/Agency Partnership from - DAY 1

• Orientation Program Manager contacts new employee to congratulate and welcome to agency
• The RED Carpet Welcome - Helps to let the new employee know that the Agency values them from the beginning
• The Documentation/Education Specialist Role Guides and Mentors the New Employee through the entire Orientation Process
• The Clinical Orientation Booklet assigns and defines responsibilities to the New Employee and to the Agency from the beginning
• Week One delivery of IT tools to facilitate communication and education

Preceptor Role

• Preceptors will go through Preceptor Orientation Program
• Preceptor will act as example and resource for the New Orientee in the delivery of Home Care Services at the agency
• Preceptor will act as an example and resource for Patient and Physician interactions.
• Preceptor will participate in assessment of New Orientee Progress during the Orientation Process.
• Preceptor will update checklist with Orientee on a weekly basis

Human Resources Coordination

• Notification from HR of discipline, start date of new hire and how many hours they will be working weekly
• Human resources prepares Orientation Booklet and other agency-specific documents
• Human Resources recruiter rolls out the “RED CARPET”
The Documentation/Education Specialist Role or Orientation Program Manager

- Primary Responsibility for Guiding the new Clinical Staff Through the Orientation Process
- Contacts new hire week before start date to congratulate and welcome him/her to agency and confirm work schedule
- Enters Orientation Specific Assignments on the Orientee’s schedule
- Collaborate with the Orientee, Preceptor, Scheduler and Clinical Manager on Orientee’s weekly progress, identifying strengths and areas for learning growth
- Provide Allscripts, Oasis, and homecare documentation education
- May assign additional HCI learning modules as needed
- Act as Mentor throughout Orientation Process

The Documentation/Education Specialist Role
A Day to Day look at the Orientation Program

- Oversight of the Onboarding process:
  - Coordinate with HR regarding start date, hours worked, days available week 1
  - Determine team and clinical manager and preceptor assignment
  - Coordinate with IT for delivery of laptop and phone
  - Prepare weekly schedules, including meetings and learning modules
  - Begin to establish mentor role

IT Coordination

- Confirm set-up and delivery of the following:
  - Cellular phone
  - Laptop
- Arrange time for orientee to sit with IT specialist to:
  - Learn how to use VPN for wireless synchronization
  - Learn how to access HCI learning modules and
  - Set-up Passwords for phone and laptop
Creating the Orientation Schedule

- Create weekly schedule to include required meetings and HCI learning modules
- Inform clinical managers of time available for field visits
- Provide and review the weekly schedule with orientee, preceptor and clinical manager

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Provide orientee with blank weekly calendars for them to fill in and for easy visual of their schedules.

Orientation Program Manager as MENTOR

- How we see the mentor role
- The purpose of a mentor is to have an available, recognized resource that the new hire can contact as needed at any point during the orientation process and beyond.
- We see the mentor providing non-judgmental guidance and support for questions or problems that may arise with any new hire.
- We see the Documentation/Education Specialist Role as the mentor for our orientees.

Documentation Education

Why is the Documentation/Education Specialist role important to the orientation process?
- Understanding homecare documentation and documenting correctly impacts so many areas of home care including:
  - Capturing patient acuity
  - Development of an accurate plan of care that validates acuity
  - Case mix weight
  - Reimbursement
  - Reported quality outcomes
Orientee Feedback on our New Orientation Program

Positive feedback received about these components:

- HCI learning modules
- Meeting office staff and learning everyone’s role
- Weekly sequential format
- Comprehensiveness

Program Review

- Annual review of Orientation Program and HCI Education Modules
  - Reviewed by Corporate Education & Orientation Committee
  - Get feedback from past orientees as to what worked well and what did not
  - Evaluate if education modules are current and applicable
  - Update regulatory and compliance education for current year
- Always a “Work-in-Progress” for improvement

Q & A