

# THE IMPORTANCE OF A COMPREHENSIVE SEQUENTIAL ORIENTATION PROCESS:

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

Presented by

Susan DeColibus, PT, MA, COS-C, HCS-D  
Natalie Kenney, RN, Care Transition Nurse Specialist  
Tracy Schultz, RN, BSN, WCC, CMSRN  
METROWEST HOMECARE & HOSPICE  
TENET HEALTH



*"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 Out-patient 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 cathethers, infusion therapy
- Depth of assessment skills needed
- Overall case management accountability
- Travel, weather and time management challenges



Understanding the Basics of Home Care

## 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- Identify Outdated Orientation components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
- Orientation Manager/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



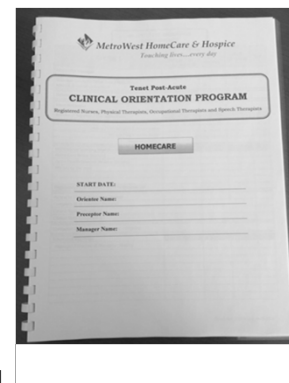
## ***Tenet Post-Acute Home Health & Hospice*** **Orientation Program Components**

- 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
- Development of Orientation Manager 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



## 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



## Components of Orientation Weekly Checklist

- **Components of Each Orientation Weekly Checklist may include some or all of the following:**
  - Manager/Preceptor/Orienteer Meetings
  - Home Care 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

RN / PT / OT / ST ORIENTATION WEEKLY CHECKLIST				
WEEK 1	INITIAL when Completed		DATE Completed	N/A
	Manager &/or Responsible Staff	Orienteer		
Meet with Manager				
Manager Conducts Office Tour / Walk Thru – Meet & Greet all Office Staff				
Orienteer receives Weekly Calendar				
Meet Preceptor				
Receive IT Supplies / Use Instructions:				
Cellular Phone				
Laptop / VPN Wireless Synchronization				
HCI Learning Modules Access				
Passwords Set-Up				
HCI Webinar Learning Modules (Required):				
Home Care Basics (60 min)				
Home Health Covered Services (60 min)				
PPS Basics (60 min)				
Regulatory / Compliance – Refer to Program List				
Access to Clinical Procedure Manual				
Complete Skills Checklist (Nursing)				
Clinical Skills Competency -				
Clinical Skills Competency -				
Computer Documentation Training - Ongoing				
Scheduled Meetings:				
Manager / Orienteer & Preceptor Meeting				

## Why the Weekly Sequential Format is Important

- Learning is presented beginning with FOUNDATIONAL information
- WEEKLY FORMAT:
  - Prevents the Orienteer 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 Orienteer identification of Orienteer strengths and learning needs

## Human Resources & IT Coordination

- HUMAN RESOURCES
  - 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
- INFORMATION TECHNOLOGY
  - 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



## Employee Engagement

- Orientee is introduced to Tenet's commitment to employee engagement
- There is a positive correlation between employee engagement and patient satisfaction
- Some examples:
  - Roll out the "Red Carpet" & Welcome Board
  - Great Expectations!
    - Plan fun employee engagement events
    - Implement ideas to improve HHCAHPs
  - High 5's, KUDOS & Shining Stars Board



## 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



*\*Note: There are many excellent resources available – HCI & Briggs are just 2 examples and the best fit for our organization.*

## Orientation Program Manager as MENTOR



- 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 schedule
- Collaborate with the Orientee, Preceptor, Scheduler and Clinical Manager on Orientee weekly progress, identifying strengths and areas for learning growth
- Provide OASIS and other homecare documentation education
- May assign additional HCI learning modules as needed
- Act as Mentor throughout Orientation Process
  - Provide non-judgmental guidance and support for questions or problems that may arise with any new hire.

## 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



## 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

WEEKLY ORIENTATION CALENDAR

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
WEEK 1					
WEEK 2					
WEEK 3					
WEEK 4					

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

## Orienteer 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

