**DEFINITIONS:**

1. **Back Office Staff** – Clinical Staff (Medical Assistants, Nursing Assistants, Lab Tech, LVNs, RNs) responsible for direct patient care
2. **NEO** – New Employee Orientation
3. **Practice Management Staff** – Clerical Operations Staff (e.g.; Call Center, Eligibility, Medical Records, Billing, Front Office Staff)
4. **Providers** – Physicians, Nurse Practitioners, Physician Assistants
5. **Subject Matter Expert (SME)** – a person who is an authority in a particular area or topic.

**POLICY:**

A. HealthPoint training and development program is designed to:
   1. Ensure staff demonstrate the highest degree of professionalism, competence and efficiency in the delivery of quality healthcare to our patients.
   2. Promote an environment of learning, teamwork, communication and positive employee morale.

B. The core TRAINING TEAM consists of the General Employee and Medical trainers. The training curriculum/content is developed by the Subject Matter Experts. The training team is responsible for NEO and ongoing staff development training for all employees. The training team utilize floor trainers and site mentors to augment the training program.

C. Training is comprised of new hire (NEO) training and ongoing staff development.

   1. **New Hire (NEO) Training Focus:**
      a. Organization Goals / Mission
      b. Human Resources Policies and Procedures
      c. Code of Conduct / Standards of Behavior
      d. Employer Expectations
      e. Employee Responsibilities
      f. Core Job Responsibilities
      g. Skill Set and Knowledge Required to Perform Core Job Responsibilities

   2. **Staff Development Training Focus:**
      a. ‘Best’ practices to guarantee quality, clinically relevant and fiscally responsible care
      b. New/Revised Policies, Procedures or Practices related to care, treatment, equipment or duties
      c. Knowledge or Performance Deficits
d. Performance Improvement Targets – For Individuals and as an Organization  
e. Customer Service – Internal and External

**PROCEDURE:**

A. New Employee Orientation (NEO) Training:

1. Is usually **scheduled** the 1st and 3rd weeks of each month.

2. Requires a dedicated **time frame**:
   a. Two weeks for direct care/front office staff at training location for introduction and overview
   b. One to two months for more complex positions (e.g.; Clinic Managers, Department Heads, Providers etc.).
   c. Sixty to ninety days at ‘home assignment’ location for specialized training and skill set efficiency

3. Begins with **Human Resources** where new hire paperwork is completed and required H.R policies are reviewed.

4. Is coordinated by the **Training Team**.
   a. **General Employee/Trainers:**
      i. Instruct on the HealthPoint required policies and trainings (Refer to Appendix A).
      ii. Tailor the depth and intensity of training to the NEO staff’s position requirements and the new hire’s learning ability/needs.
      iii. Schedule/coordinate position specific trainings utilizing the Medical Asst. Trainer, subject matter experts, floor trainers and site mentors.
      iv. Provide initial and ongoing evaluation of staff’s understanding and performance ability.
   
   b. **Medical Asst. Trainer:**
      i. Instruct clinical “Back Office” staff (Medical Assistants, Nurses Aides, LVNs), on clinical topics relevant to the new staff’s position. (Refer to Appendix B - Clinical Curriculum)
      ii. Evaluate staff’s retention of instructions and proficiency performing the following:  
        * Interviewing Patients  
        * Obtaining Vital signs, BMI, Pulse Ox  
        * Special Procedures: EKGs, Administering Oxygen and Nebulizer treatments  
        * Administering injections and vaccines  
        * Obtaining labs – fingersticks/heelsticks, phlebotomy, urinalysis etc.  
        * Documenting physical complaint, social history, updating medications  
        * Emergency Management: (e.g.; Chest Pain protocol, SOB Protocol, Localized vs Systemic allergic reaction to injections, RIDER reporting)

   c. **Supplemental training** is provided by:
      i. Subject matter experts  
      ii. Staff identified as floor trainers and site mentors  
      iii. Immunization Coordinator

5. **NEO staff’s comprehension of instruction and competency performing skills** pertinent to his/her role, are evaluated by the Training Team, floor trainers and site mentors:
   a. Post classroom in-services throughout the initial two-week orientation  
   b. Post SHADOWING experience with floor trainers  
   c. Post HOME CLINIC assignment


6. **Formal Training Plans** are developed when:
   a. NEO staff do not demonstrate knowledge or proficiency necessary to perform his/her role in a timely or efficient fashion
   b. NEO staff or NEO staff’s supervisor request support and additional training

7. **Competency** is assessed via tests, return demonstration and direct observation.

8. **NEO training** is considered **completed** when documentation of NEO staff’s competence and proficiency is:
   a. Reviewed by Clinic Manager, Training Team and D.O.N (for back office staff and Providers)
   b. Accepted as sufficient by Clinic Manager, Training Team and D.O.N.
   c. Received by Human Resources

B. **Staff Development**

1. Staff development **process** is:
   a. Anchored in day to day work
   b. Multifaceted
   c. Ever-changing
   d. Ongoing
   e. Built on a foundation of collaboration and emphasizes team work

2. The **goal** of staff development is improvement in staff and organizational effectiveness through trainings on:
   a. Job requirements – process/policy changes
   b. Relationships – team building
   c. Performance improvement targets

3. **Components** of HealthPoint’s staff development program:
   a. Performance Assessments (Post hire or post a changed role, periodic, annual)
   b. Gap Analysis process to identify training needs
   c. Internal and external resources required to deliver training
   d. Performance rewards to promote participation and recognize excellence
   e. Career development and career transition promotion
   f. Organizational development

4. **Staff Development Plans**:
   a. Are individualized to reflect staff’s personal and professional goals
   b. Include short and long-term goals for both individuals and/or the organization
   c. Identify the method of training
   d. Identify time-frames to attain the goal
   e. Are evaluated for effectiveness
   f. Are revised as appropriate based upon effectiveness and resources

5. **Responsibility** for staff development lies jointly with:
   a. Each individual staff member to take responsibility for his/her career and to take advantage of opportunities for his/her professional development.
   b. Human Resources and the Training Team to coordinate and deliver a comprehensive range of programs and activities.
c. Leaders to support, evaluate and document individual staff member development and training needs.

d. The organization to provide resources to support staff development and training.

**RELATED POLICY:**
( Name of any related procedure here)

**REFERENCES:**
( Leave blank if none)

**REQUIRED BY:**
( Leave blank if none)

**ATTACHMENTS/ENCLOSURES:**
Appendix A – List of HealthPoint required trainings
Appendix B - Clinical Curriculum Table of Contents
**POLICY/PROCEDURE TRACKING FORM** (to be added as last page of each P&P for documentation of changes)

<table>
<thead>
<tr>
<th>TITLE:</th>
<th>STAFF TRAINING</th>
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<tr>
<td><strong>Scope/Purpose:</strong></td>
<td>To provide guidelines for new hire training and staff development.</td>
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<tr>
<td><strong>Division/Department:</strong></td>
<td>All HealthPoint Clinics</td>
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<td><strong>Policy/Procedure #:</strong></td>
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<tr>
<td><strong>Original Date:</strong></td>
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</tr>
<tr>
<td><strong>Date Reviewed:</strong></td>
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**Date of Revision** | **Description of Changes**
---|---
Feb 2016 | Wrote the policy to reflect current staff development, training, and assessment process and structure