The Forgotten Ones: Improving the Onboarding Process for Clinical Staff in the Ambulatory Setting

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Disclosure

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There are no known conflicts of interest
Objectives and Purpose

• Present a more interactive learning experience for clinical new hires
• Practice patient safety measures before new hires start in the clinic
• Design standardized competency assessments
• Integrate a formal preceptorship program to oversee the progress of clinical new hires
• Provide ongoing learning opportunities for clinical new hires
Background

- With the increased focus on ambulatory care as the patient’s medical home, **increasing the skills and competency of the staff** (RN, LPN & MA) in this environment is critical.

- The lack of a robust onboarding process for nurses and medical assistants in physician practices can **impact quality of care** and **patient satisfaction**, and **affect practice flow and efficiency**.
Process

• A team was formed to develop a robust program that would benefit 230 multispecialty practices in WellStar Health System

• After two months of program development, WellStar’s new onboarding curriculum was introduced the week of September 12, 2016
Collaborative Team

• Organizational Learning
  – Professional Development Specialists, Leadership, Instructional Designers

• Clinical Services Department
  – Leadership, Clinical Management Consultants, CNLs, Quality, Safety, Clinical Leads
Week 1

- Day 1: WellStar Health System Orientation
- Day 2: Medical Group Orientation
- Day 3: Infection Prevention & Medication Exam
- Day 4: EHR Training
- Day 5: Simulation, Skills, and Education
Week 2

- Train with Preceptor
- Stage 2 Competencies check-off
- Begin Computer Based Learning Modules (CBLs)
- End of week progress check-in with Manager and Preceptor
Week 3

• Continue competencies and CBLs

• Learning day including:
  – Immunizations for Life
  – Ethics
  – Professional Practice
  – Epic Q&A

• End of week progress check-in with Manager and Preceptor
Week 4

• Final week with preceptor
• Completion of competencies
• Final “check-in” with Manager and Preceptor
# Competencies

## Stage 1 Competencies
- Basic competencies to be completed in Skills and Simulation Lab
- Include vital signs, medication administration and rooming process

## Stage 2 Competencies
- Core competencies that ALL clinical staff should be competent in performing, regardless of service line or specialty
- Include use of emergency supplies, how to enter online Event report, etc.

## Stage 3 Competencies
- Service line and specialty-specific competencies
- Pediatrics, General Surgery, Neurology, etc.
# Competencies Snapshot

**Stage 1 of 3 Orientation Competencies Assessment Form**

**Employee Name:**

**Employee Number:**

**Department Name:** WellStar Medical Group

**Department Number:**

**Job Title (RN, LPN, MA):**

**Date:**

Instructions: Orientation Competency Assessment will be assessed during initial orientation, and whenever indicated by Quality Indicators or issues. For any "Competency Not Demonstrated," a performance improvement plan is required.

## Competency Statement

### Infection Prevention

- Demonstrates appropriate alcohol hand cleaning
  - Competency demonstrated
  - Competency not demonstrated

- Demonstrates appropriate placement and removal of personal protective equipment
  - Competency demonstrated
  - Competency not demonstrated

- Demonstrates appropriate hand washing
  - Competency demonstrated
  - Competency not demonstrated

- Demonstrates environmental cleaning
  - Competency demonstrated
  - Competency not demonstrated

- Demonstrates injection safety according to infection prevention guidelines
  - Competency demonstrated
  - Competency not demonstrated

## Verification Methods

**A. POLICIES & PROCEDURES/RESOURCES**

Locates and reviews the following resources:

- Resources Found on eSource:
  - Human Resources Policies and Procedures
  - Standard Policies and Procedures
  - WellStar Medical Group Policies and Procedures
  - Infection Control - WMA2 Policy section 600
  - WellStar Medical Group Website
  - Center for Nursing Excellence Website
  - Organizational Learning Website
  - WellStar Library
  - WellStar Connect

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**Stage 2 of 3 Core Competencies Assessment Form**

**PRECEPTOR Validation of Competency**

<table>
<thead>
<tr>
<th>Resource</th>
<th>Date</th>
<th>Evaluation Method</th>
<th>Competent</th>
<th>Needs Review</th>
<th>N/A</th>
<th>Initials</th>
</tr>
</thead>
</table>

**Method of Evaluation Key:**

- S = Simulation
- T = Test (Success Factors or Elements)
- D = Discussion/Verbal Review
- P = Practical Application
- B = Return Demonstration

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**Stage 3 of 3 - ENT Competencies Assessment Form**

**Employee Name:**

**Employee Number:**

**Department Name:**

**Department Number:**

**Job Title:**

Instructions: ENT Competency Assessment will be assessed during initial orientation, and whenever indicated by Quality Indicators or issues. For any "Competency Not Demonstrated," a performance improvement plan is required.

## Documentation

- Demonstrates EPIC workflow for rooming patients in the ambulatory setting
  - Competency demonstrated
  - Competency not demonstrated

- Demonstrates appropriate knowledge of medication reconciliation
  - Competency demonstrated
  - Competency not demonstrated

- Demonstrates documentation of medication administration
  - Competency demonstrated
  - Competency not demonstrated

## Verification Methods

- 1. Clinical Skills (Non-Invasive)
  - Measuring blood pressure manually (adult, child, adolescent)
  - Measuring temperature (adult, child, adolescent)
  - Measuring pulse rate (adult, child, adolescent)
  - Measuring respiration (adult, child, adolescent)
  - Performing and estimating spirometry
  - Obtaining oxygen saturation with a pulse oximeter (infant/child/adult)
  - Measure Pulse Intensity
  - Usage of pachroo boards for foreign body removal from airways
  - Performs proper care and maintenance of ENT stands to include changing of suction containers and tubing, and set of卓

- 2. Clinical Skills (Invasive)
  - Ear Irrigation
  - Scleral Ear Irrigation

- 3. Comprehends and Administers Specialty Specific Medications
  - Specialty specific intravenous medication administration
Feedback

- Decreased turnover
- Practice managers and Nursing Supervisors report new hires are arriving in the practices better prepared
- New employees report they enjoy the skills sessions, and appreciate the information and training before starting in the practices
- Positive feedback given via orientation surveys
What we’re hearing...

• “Coming from another health system, I did a lot of comparisons. WellStar rules!” ~ Orientee

• “I love the new program!” ~ Practice Manager

• “Loved the skills portion! The instructors were amazing and taught the skills with proficiency”. ~ Orientee
Outcomes

• WellStar's improved interactive onboarding program has been an extraordinary success

• With the introduction of Stage 1 competencies during the first week of onboarding, nursing leadership has been able to identify employees who may require additional attention or an extended preceptorship period
Challenges and Next Steps

• Challenge always exists to identify and develop clinical preceptors from within the existing employee pool

• More attention needed in this area and an incentive offered to encourage employees to view becoming a preceptor as a career development opportunity and positive experience
Contacts

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