



**Public Health**  
Prevent. Promote. Protect.  
Panhandle Health District

# Onboarding Process

Panhandle Health District  
**Quality Improvement Story Board**  
December 2015

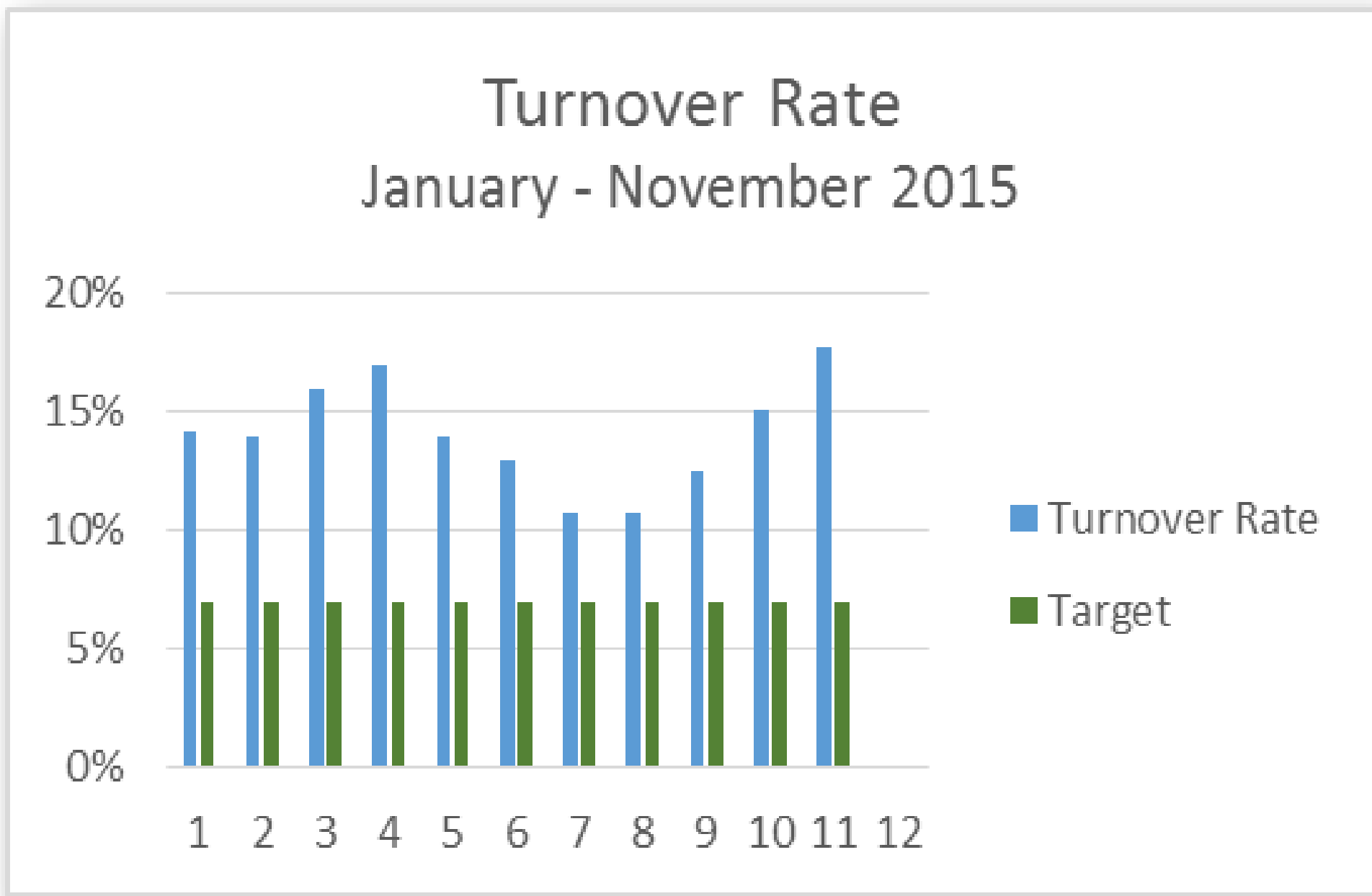


## Plan Identify an Opportunity and PLAN for Improvement

### 1. The Problem

The process of onboarding new employees was identified as being inconsistent and lacking in structure.

- An improved onboarding process would increase retention of staff by decreasing turnover rates.

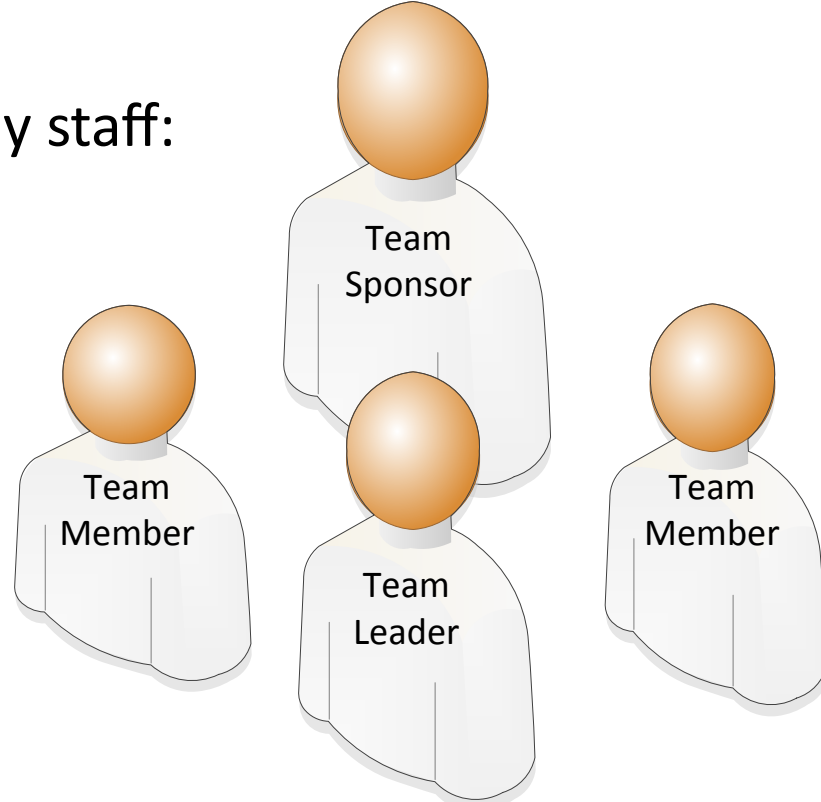


- New employee training and policy review was not efficiently documented or followed up on when not completed.
- New employee orientation and HIPAA training occurred every quarter, which, in some cases, meant that an employee may not receive vital information and training until after three months of employment.

### 2. Assemble the Team

The team was developed to include four key staff:

- Team Sponsor: Lora Whalen
- Team Leader: Dale Peck
- Team Members & Area of Expertise: Mark Anderson, Mashelle Kenney
- Other staff were involved as the planning evolved: Don Duffy, Melanie Collett, Dean Keck



**AIM Statement**  
The Health District's onboarding process is inconsistent and lacking in structure and documentation. An improved onboarding process can improve retention of staff.

This process will allow an opportunity to improve staff public health knowledge and effectiveness and include new methods of orientation for new employees.

Internal tangible benefits of a streamlined onboarding process are:

- To increase staff retention;
- Improve staff knowledge about the overall organization;
- Improve staff satisfaction; and
- Adoption of a process to onboard all new staff.

An external tangible benefit would increase client satisfaction if employees are properly trained on all aspects of the organization.

### 3. Examine the Current Process

The team examined the current process and found that:

- The tracking mechanism for employee training and review of policies/procedures was not consistently documented;
- New employees were not returning the signed certification of reviewing required policies;
- Supervisors were inconsistent in hiring processes and orienting new employees; and
- New employees were not receiving critical training in a timely manner. The face-to-face quarterly employee orientation, quality improvement (QI) training and HIPAA training was not effective nor was it an efficient use of staff time.

### 4. Identify Potential Solutions

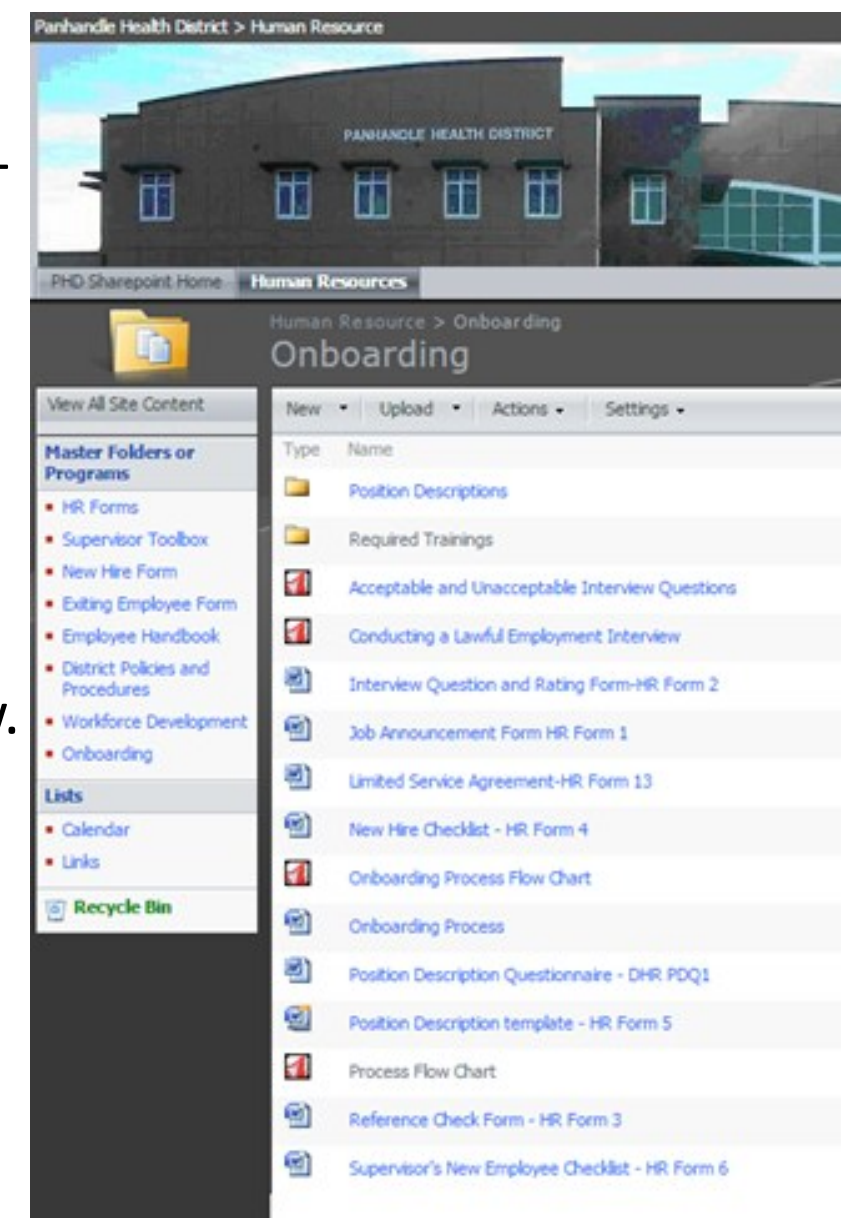
The team agreed upon a desired outcome and outlined a process to get there.

- Supervisors need training on the hiring process;
- An efficient tracking system for required trainings and review of required policies;
- A clear online orientation to familiarize employees with the organization within the first few weeks of hire; and
- HIPAA training needs to happen immediately after hire, especially for clinical staff.

## Do Test the Theory for Improvement

### 5. Develop an Improvement Theory

- The team met over several months to document a process. A visual flow chart was created defining each step and next steps.
- Forms and checklists were updated and combined to reduce redundancies and clarify steps.
- Online employee orientation and quality improvement training was developed to efficiently train new employees in a timely manner.
- Licenses to HIPAA Training.com were purchased for each employee to be properly trained. The training site has a tracking component.
- The use of TRAIN LMS was established to track required trainings and policy review. The TRAIN administrator notifies Division Administrators of employee completion status at 30 days of hire.
- The final process, flow chart, forms and required trainings were placed in one location on SharePoint for easy access by supervisors.



## Check Use Data to Study the Results

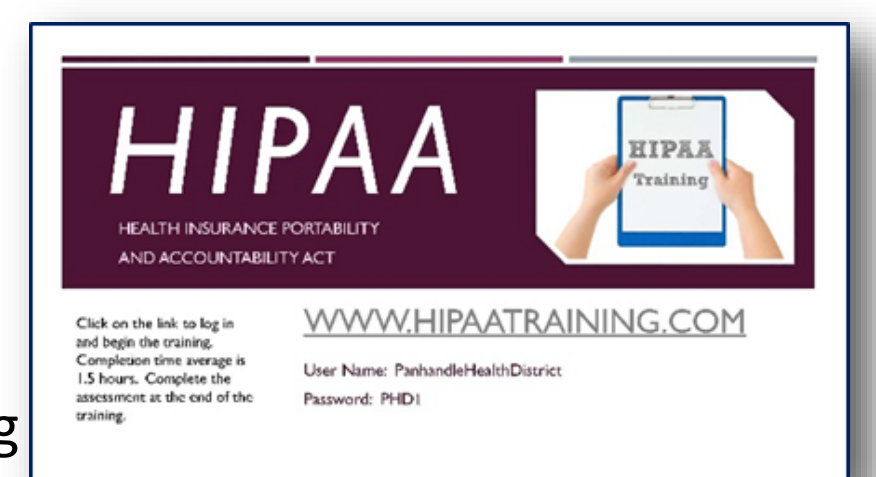
### 6. Check the Results

- The team met to review the final product. A few modifications were made and the process was finalized.
- Supervisor training was scheduled for all supervisors and led by three team members: Dale, Mark and Mashelle.
- New employees tested the model training and were asked for feedback. Common issues were that the training did not work well with Internet Explorer unless the user has IE10. Chrome is the preferred browser for viewing the online Orientation and QI component.

## Act Standardize the Improvement

### 7. Standardize the Improvement

- The training team met with supervisors in December 2015. Supervisors were in agreement with adopting the Onboarding process.
- The process has been adopted as an official protocol of the Recruitment and Hiring Policy.



### 8. Establish Future Plans

New employees as well as supervisors will benefit from the streamlined onboarding process. New employees will have an opportunity to provide feedback of the orientation process.



The process will be evaluated by the team in one year to determine if changes are needed. Adjustments will be made as necessary.