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 Owner: *Remegio Luna: Laboratory Supervisor*
 Policy Area: *Laboratory*
 References:

Orientation and Training - Laboratory

Values Context:

Practicing within the context of our core values of Compassion, Dignity, Justice, Excellence, and Integrity ensures the provision of respect for each person, accountability, commitment to quality, opportunities to serve each other and a sense of community among all persons.

Purpose:

To describe the policy and procedure for the orientation and training of newly hired Clinical Laboratory Scientists, Phlebotomists, and Technical Assistants in the QVMC Clinical Laboratory.

Policy:

1.0 In addition to Queen of the Valley Medical Center organization orientation, the Laboratory will provide and document the following orientation:

- 1.1 Organization wide and laboratory specific policies and procedures on safety, infection control, and disaster preparedness related to the laboratory areas of responsibility.
- 1.2 Job description duties and responsibilities through department specific training.
- 1.3 Pre-analytic, Analytic, and Post Analytic activity they will be expected to perform.

2.0 The Laboratory will provide tools and resources required to perform job specific duties and responsibilities. This includes computer access and applications, department specific training, and access to reference materials.

3.0 Training will be provided and documented for new test methods and changes to policy and procedure manuals. See "Document Change Management" policy and procedure manual.

Considerations/Regulations/Related Issue:

The Joint Commission Comprehensive Accreditation Manual for Laboratory and Point-of-Care Testing

- HR.01.04.01
- HR.01.05.03

Scope/Responsible Person(s):

1. All licensed or certified Laboratory staff within their respective scopes of practice
2. Laboratory Volunteers
3. Laboratory Students
4. Non-licensed and Non-certified Laboratory Staff

Procedure:

New Hire Orientation and Training

1.0 The hiring manager will be notified that the new hire has been cleared by HR and a start date will be scheduled.

2.0 Upon notification, the hiring manager or designee will initiate the onboarding process by preparing the following documents in an Orange Training Binder: (See Attachments)

- B0 Pre Onboarding Checklist
- B1 General Laboratory Orientation
- B2 Laboratory Orientation and Safety Checklist
- B3 Training Schedule Template

3.0 Before the new hire's first day, the hiring manager or designee will complete the B0 Pre Onboarding Checklist and B3 Training Schedule Template.

Note: The B0 document is a pre-onboarding checklist ensuring that computer access, email accounts, LIS accounts, training binders and folders have been set up and ready for Laboratory Orientation.

Note: The B3 document outlines the new hires orientation and training schedule starting with the new hire's first day and sets the expectation of the training completion date.

Note: The training schedule follows a department specific training plan or will follow the subjects on the Competency Assessment form.

3.0 On their first day, newly hired employees will attend QVMC New Employee Orientation.

4.0 On their second day, newly hired employees will attend Laboratory Orientation, completing the documents B1 General Laboratory Orientation and "B2 Laboratory Orientation and Safety Checklists".

4.1 Once completed, both documents are signed and dated by both the trainer and the new hire.

4.2 The newly hired employees will also review B3 Training Schedule with their hiring manager or designee to map out the department training subjects and to set the expectation for training completion.

4.3 The new employee will also submit any licenses or certifications to be posted.

5.0 On the third or fourth day, laboratory department specific training begins with the subjects that are outlined on the B3 Training Schedule Template.

6.0 Once training has completed:

6.1 The trainee and department supervisor will sign and date the department specific Competency Assessment form to be filed in the Training File Cabinet.

6.2 The new employee will be placed on the schedule to cover shifts

6.3 The new employee will be placed on the Competency Assessment Master Spreadsheet as a First Year Caregiver. See “Competency Assessment – Laboratory” policy and procedure manual.

7.0 The Successfactors management orientation program will be performed with periodic check-ins for new hire onboarding assessments as part of personal and professional development.

Training for New Test Method Changes

1.0 Training will be conducted individually or in groups for new testing methods by the trainer also considered to be the subject matter expert.

1.1 Once training is completed, group or individual training completion forms or checklists will be signed by the trainee and trainer.

Training for Employee Department Addition or Transfer

1.0 Employees can transfer or be added to different departments but must first meet the requirements and be trained to perform the job duties for the respective department.

2.0 Employees must follow the department specific training plan or follow the subjects on the department specific Competency Assessment form.

3.0 Training will be conducted by the department specific trainers.

4.0 Once training is completed the department specific Competency Assessment form is signed by the trainer and department supervisor.

5.0 The employee can then be placed on the work schedule for the department.

Policy and Procedure Changes

1.0 P&P changes with regards to document formatting, updating, or minor process changes will follow the “Document Change Management” P&P manual.

References:

The Joint Commission Comprehensive Accreditation Manual for Laboratory and Point-of-Care Testing

Attachments:

- B0 Pre Onboarding Checklist
- B1 General Laboratory Orientation
- B2 Laboratory Orientation and Safety Checklist
- B3 Training Schedule Template

Attachments:

[B0 Pre Onboarding Checklist.docx](#)

[B1 General Laboratory Orientation.docx](#)

[B2 Laboratory Orientation and Safety Checklist](#)

[v12-2018.doc](#)

Approval Signatures

Step Description	Approver	Date
Laboratory Medical Director	Brady Feliz: Physician, Laboratory Medical Director	09/2019
Laboratory Admin Director	Olive Romero: Administrative Laboratory Director	09/2019
	Remegio Luna: Laboratory Supervisor	09/2019

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