TRAINING UPDATE

Lab Location:	All	**Date Distributed:**	3/13/2013
Department:	Management team	**Due Date:**	4/1/2013

DESCRIPTION OF PROCEDURE

Name of procedure:
New Employee Orientation and On-Boarding Process   **GEC.L46, SGAH.L53, WAH.51   v000**
Description of change(s):
New SOP to describe the orientation process for a new employee

Document your compliance with this training update by taking the quiz in the MTS system.

Approved draft for training all sites (version 000)

Non-Technical SOP

Title	**New Employee Orientation and On-Boarding Process**
Prepared by	Stephanie Codina Date: 3/5/2013
Owner	Lori Loffredo, Robert SanLuis Date: 3/5/2013

Laboratory Approval

Print Name and Title	Signature	Date
Refer to the electronic signature page for approval and approval dates.		

Local Issue Date: Local Effective Date:

Review:

Print Name	Signature	Date

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1. **PURPOSE**
   To provide a guideline for supervisors/managers/directors who are orienting new employees in the laboratory.

2. **SCOPE**
   This procedure outlines the steps that should be taken to orient a new employee to the hospital environment.

3. **RESPONSIBILITY**
   All members of the laboratory leadership team must understand and complete the tasks required to on-board a new employee.

4. **DEFINITIONS**

   Onboarding: Also known as organizational socialization. Refers to the mechanism through which new employees acquire the necessary knowledge, skills, and behaviors to become effective organizational members and insiders.

5. **PROCEDURE**

   A. **Tasks that should be performed after an employee is hired, but before the employee starts. The employee's supervisor is responsible for performing tasks with the new employee unless otherwise specified.**

      a. Employee Services (ES) will schedule the employee for a pre-employment drug screen, physical, and FIT testing (phlebotomists). It is important to note that hospital employees will be allowed to complete the employee physical on the days he/she attends new employee orientation (NEOP). Hospital employees will not be required to travel to Chantilly to complete the employment physical before NEOP. Employees cannot report to work until all results have been received and the employee has been cleared by the Employee Health Services (EHS) Nurse.

b. The employee's supervisor will contact the employee to establish a training schedule and location in advance. If possible, he/she will e-mail a copy of the schedule to the employee.

c. For new WAH employees, contact the hospital human resources department to schedule the employee for hospital orientation (1 day). New SGAH/GEC employees will complete hospital orientation on MTS.

d. Inform the QA department of the new employee's start date, work location, facility, and training location. The QA department will ensure training documents are prepared for the employee.

e. Complete the Computer Password Request Form (AG.F167) and forward the form to the LIS department to obtain Sunquest access for the employee.

f. Complete the "Access Control Request Form" found in the Information Services section of the Adventist intranet to obtain Novell, Groupwise, and Cerner access for the employee.

g. Notify the administrative assistant that a new employee is starting. The administrative assistant will set up an employee file for the employee.

h. Request a locker assignment. Note: Some SGAH lockers will require that the employee provide a lock. Notify the employee if his/her locker needs a lock.

i. One week prior to NEOP, ES will contact the supervisor/manager to provide instructions for the new employee on his/her first day at the hospital. These instructions should include:

    i. Where the employee should report on his/her first day to include an address or directions.
    ii. The time the employee should report to work on the first day.
    iii. Where the employee should park on the first day.
        1. SGAH staff members can park in the garage.
            a. Press the button on the call box.
            b. Security will answer.
            c. Employee should tell security that he/she is a new employee and needs access to the garage.
            d. Security will need to know if the employee is at the Cancer Center or Emergency Center Entrance.
            e. Security will open the garage gate remotely for entrance.
        2. WAH staff members should park wherever they can find parking. Takoma Academy is available for overflow parking.
    iv. Directions to the laboratory.
        1. SGAH staff members should follow signs to radiology on the 2nd floor.
        2. WAH staff members should follow signs to the lab on LL1.
    v. The phone number of the person the employee should contact if problems or issues are encountered.

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      vi. Instructions to bring all papers received during NEOP.

     vii. Instructions to bring copies of degrees, transcripts, and certifications on the first day.

  j. Print and save all e-mails you receive with employee access and temporary passwords printed on them.

  k. When the employee ID has been created, forward the ID to the Laboratory QA department. A Lab QA staff member will add the new employee to the MTS system.

B. Tasks that should be performed on the employee's first day of work at the hospitals. The employee's supervisor is responsible for performing tasks with the new employee unless otherwise specified.

  a. Provide the employee his/her locker assignment and allow him/her to place personal items in the locker. Request a locker from the administrative assistant if an assignment was not made in step h above.

  b. Show the employee where the Kronos clock is located and how to use his/her badge to clock in and how to request TOP.

  c. Show the employee where the labcoat machine is located and help the employee obtain a lab coat.

  d. Introduce the new employee to the department and give a brief tour of the lab.

  e. Register the employee for Employee Self Service (ESS) system and the Remote Access Card (RAC).

      i. You will receive 2 e-mails with account information for the new employee. These will be used to establish access to the Quest systems.

        1. One will contain a PeopleSoft ID which is the same as the employee number.

        2. One will contain the employee's username, temporary password, and SAM PIN number.

     ii. Access the registration page.

        1. Access the ourQuest online main screen.

        2. Click the "Employee Center" tab.

        3. Click on "Employee Self Service."

    iii. Establish a password for ESS.

        1. Click on "About Passwords."

        2. In the "UserID" field, the employee must type his/her username that was provided. Generally, this is the firstname.middleinitial.lastname (up to 20 characters total).

        3. In the "Old Password" field, the employee will type the temporary password that was provided. This password is case sensitive.

        4. In the "New Password" and "Confirm New Password" fields, the employee will type a password that he/she chooses.

          a. Password must be at least 8 characters.

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b. Password must contain at least one lower-case letter, upper-case letter, number, and special character.
5. Click the "Submit" button. If the password meets specifications, it will change. The employee should write this password down if he/she won't remember it.
6. Instruct the employee to log into ESS at least every 3 months to avoid deactivation.
    iv. Register the employees remote access card (RAC).
1. Click on "Activate Remote Access Card."
2. Click on the "Activate Remote Access Card" box.
3. Have the employee enter his/her ESS username and password at the prompts.
4. Type the PIN number from the RAC into the requested field to activate.

f. Register the employee in the Secure Access Manager (SAM) system.
    i. Click on the icon in the lower, right-hand corner of the screen that looks like a key.
    ii. A "Secure Access Manager" pop-up menu will appear on the screen.
    iii. Click the "Reset" button to access the program. Note: This program loads slowly.
    iv. The employee will need to type his/her employee ID and the last 4 digits of his/her social security number to access.
    v. Follow the prompts to register the new employee.

g. Complete credentialing documentation in ESS (technical staff only).
    i. Scan the employee's degrees, transcripts, and certifications. Scan transcripts and certificates for the same degree program together into the same document.
    ii. Access ESS and have the employee sign in using his/her newly created password.
    iii. Click on "Main Menu."
    iv. Click on "Self Service."
    v. Click on "Licensure Qualifications."
    vi. Click on "My Current Profile."
    vii. At the "Profile Type" prompt, select "QD_Person" and click the "Continue" button.
    viii. Complete tabs for licensure, certification, and academic education per corporate policy, "Policy for the Documentation of Testing Personnel Qualifications in PeopleSoft^{TM}."

h. Complete NEOP Compliance Training. ***Note: This MUST be completed in the first month of employment.***
    i. Compliance questions are given to the employee at NEOP. The questions are printed in green ink.
1. Obtain the questions from the employee.
2. Read the introduction and circle the questions that must be answered for the particular job category as printed on page 1 of the document.

  ii. Access the Compliance policies and procedures.
    1. Access the ourQuest online main screen.
    2. Click on "Units & Functions."
    3. Click on "Compliance."
    4. Click on "Policies & Procedures."
    5. Click on "Compliance."
    6. Click on "Policies/Procedures & Supporting Documents."
    7. A list of policy/procedure names will appear.
  iii. Review all policies and procedures required by job category and answer the corresponding questions. The completed question sheet gets routed to the QA department for the employee's training file.
  iv. Sign off the "Compliance Policy Training Certification" form which will be e-mailed to the supervisor by the Compliance Department after the employee attends NEOP. The certification form gets returned to the Compliance department.

i. Complete the "Supervisor's Packet" with the new employee.
  i. Ensure all training completed in NEOP is filled out completely and correctly. Review items with the employee if they have not been completed or if the employee is not comfortable with the information.
  ii. The packet contains a sheet for reviewing MSDS data in the lab.
    1. SGAH MSDS forms can be found on the Adventist Intranet.
    2. WAH uses a telephone system for tracking MSDS forms. The number is posted on laboratory telephones.
  iii. The packet contains the form, "Best Laboratory Practices Tech ID Authorization Form." Complete this form if the employee needs access to the FES system. The instructions for completion can be found on the bottom of the form. Fax the completed form to ITS Operations at 703-802-7107.
  iv. The back page of the packet contains documentation that the employee attended NEOP. The supervisor should maintain this completed form with Kronos adjustment logs.
  v. The completed supervisor's packet gets routed to QA to be placed in the employee's training file.

j. Review any other papers the employee was given during NEOP. Remove mandatory training documentation such as the Documentation Technique or Proficiency Testing quizzes. Sometimes mandatory training documentation is sent with the employee and other times it is returned via interoffice mail. Complete documentation is given to the QA department to be placed in the employee's training file.

k. Complete New Employee Overview and safety training documentation with the new employee.
  i. Forms will be contained in the training documents received from the QA department.
  ii. Give the employee a tour of the hospital and laboratory areas.
  iii. Instruct the employee to read all safety, LIS, and departmental procedures.

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        iv. Walk the employee to the point where laboratory employees will meet following an emergency evacuation.
1. At SGAH this is the tunnel between the hospital and the 9715 building.
2. At WAH this is the physician parking lot outside the back door by the lab.
3. At GEC, this is the back parking lot outside of the back door.
        v. Return the completed forms to the QA department to be filed in the employee's training file.

l. SGAH employees only: Assign the hospital orientation module in MTS and ensure the employee completes the attestation statements after completing the module.

m. Provide the employee his/her Sunquest password and logon information.
        i. Have the employee sign the LIS Security Agreement form and return to the LIS department.
        ii. Instruct the employee to keep the paperwork until requested by his/her trainer.

n. Provide the employee his/her Groupwise/Novell/Cerner logon information (if applicable). Instruct the employee to keep the paperwork until requested by his/her trainer.

o. Have the employee complete the information sheet provided by the administrative assistant. This will be used to add the employee to laboratory rosters. Return the completed form to the administrative assistant.

p. Give the employee his/her training documents and introduce the employee to the primary trainer. Training documents are a measure of competency and ***must be completed before the employee works independently.***

q. For new BB staff members only, instruct the employee to have fingerprints made.
        i. Fingerprint cards and vendor information is available in blood bank.
        ii. The employee must make an appointment in advance to have fingerprints made.
        iii. The employee must pay to have fingerprints made. Quest will reimburse the employee via the Finance Concur system when the employee presents a receipt for fingerprinting.
        iv. The supervisor must request a check for fingerprint submission via Check Requests using the e-mail.

C. Tasks to be performed after the employee's first day.
a. During the first few weeks/months of employment, meet with the employee frequently to answer questions and provide feedback. Ensure the employee is on track with training goals. Review training documents for progress and proper completion.

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     b. Written evaluations are completed after 6 months and will be coordinated via the Employee Services department.

     c. Competency will be assessed at 6 months from completion of the training module(s) and annually thereafter. The training database is utilized as a reference for calculating when the 6-month competency is due. Quality assurance staff members monitor the database and notify the supervisor/manager when competencies are due.

6.   RELATED DOCUMENTS

A. Policy: QDMED717 "Policy for the Documentation of Testing Personnel Qualifications in PeopleSoft^{TM}"

B. Specimen Processing Procedure: FES Password

C. Form: Employee Information Form

7.   REFERENCES

None

8.   REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes GEC.L32,SGAH.L35,WAH.L34 v002		

9.   ADDENDA AND APPENDICES

Employee Information Form (see Attachment Tab of InfoCard)

EMPLOYEE INFORMATION FORM

CONFIDENTIAL

NAME: _____

Quest Employee ID _____

DOB: **Month** _____ **Day** _____ (For Birthday List)

TITLE: _____

SUPERVISOR: _____

SHIFT (Day, Evening, Night): _____

Full Time _____ **Part Time** _____

HOME PHONE: _____

CELL PHONE: _____

PAGER: _____

HOME ADDRESS: _____

_____

EMAIL: _____

EMERGENCY CONTACT: _____ **Phone #:** _____