TRAINING UPDATE

Lab Location:	GEC, SGAH & WAH	**Date Distributed:**	10/15/2014
Department:	Management	**Due Date:**	11/11/2014
		Implementation:	**11/12/2014**

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:

New Employee Orientation and On-Boarding Process
GEC.L46, SGAH.L53, WAH.L51 v1

Description of change(s):

Section 5:

- Updated process for notifying the employee of the training schedule.
- Deleted process for in-person NEOP and replaced with online instructions.
- Added instructions for I-9 verification, ID badge request, and prox card request.
- Updated NEOP compliance requirements.

Section 6: add forms
Section 9: form moved to section 6

Note:
Copies of the Quest forms for ID Badge, Building Access, and Kronos Registration and Request for Replacement Proxy Card can be found at following file path on G drive:

G:\AHC_Lab\Forms\General Lab\HR

This revised SOP will be implemented on November 12, 2014

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

Approved draft for training at all sites

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. Once an offer is made, the recruiter will establish the new employee's start date and contact the supervisor for the training schedule.
   i. The recruiter will notify the new employee of the training schedule.
   ii. The supervisor/scheduler should add the new employee to the schedule once a start date is established. It is recommended that the supervisor e-mail a copy of the schedule to the new employee or send an e-mail to activate an account in the online scheduler.

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b. Employee Services (ES) will schedule the employee for a pre-employment drug screen, physical, and FIT testing (phlebotomists). Employees will not be allowed to report to work until all results have been received and the employee has been cleared by the Employee Health Services (EHS) Nurse.

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

j. 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. Request Quest badge and WFC prox card for the employee.
    i. Take a clear picture of the employee against a white background for the Quest ID badge.
    ii. Complete the following forms:
        1. ID Badge, Building Access, and Kronos Registration
        2. Request for Replacement Proxy Card
    iii. E-mail the forms and the photo to the security office and request that the new badges be sent via interoffice mail to the supervisor.

b. Walk the employee to the hospital security department to request a hospital identification badge.

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c. 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.

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

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

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

g. Complete the I-9 form verification. I-9 verification must be completed within 3 business days or the employee will not legally be allowed to work.
    i. The employee must complete his/her portion of the form prior to the initial start date.
    ii. The online verification will instruct the employee to bring his/her official identification document(s) to his/her first work day.
    iii. Once the employee completes his/her portion, the system will forward a verification e-mail to the supervisor.
    iv. The supervisor must click onto the link provided in the e-mail and verify and scan the documents into the online verification program.
    v. The supervisor can delegate this task to another employee by logging in and following the online delegation instructions. Simply forwarding the e-mail will not allow the delegate to complete the verification.

h. Register the employee for Employee Self Service (ESS) system.
    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.

i. 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.

j. Provide the employee with a copy of his/her remote access card (RAC) (Also known as egrid card).
   The supervisor will receive two e-mails regarding the employee's RAC.
   i. The first e-mail will notify the supervisor that a RAC has been assigned. This e-mail will contain a PDF copy of the RAC.
      1. Print one copy of the RAC and give it to the employee.
      2. Forward an electronic copy of the RAC to the employee so it can be saved for future use.
      3. Explain to the employee that the RAC is used to access the Quest site from home.
   ii. The second e-mail will notify the supervisor that the RAC has been activated for the employee.

k. 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™."

l. Complete the online "New Employee Orientation" modules.

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i. Have the employee log onto a computer and access IntelliQuest.
ii. The new employee orientation modules will be pre-assigned to the employee.
iii. The employee must complete all modules assigned.

m. Complete NEOP Compliance Training. *Note: This MUST be completed in the first month of employment.*
  i. Access the NEOP compliance worksheets.
    1. From the Quest homepage, click "Units and Functions."
    2. Select "A-H" from the dropdown menu.
    3. Select "Compliance" from the dropdown menu.
    4. Click on "Forms & Contracts."
    5. Select "Compliance" from the dropdown menu.
    6. Click on "Forms."
    7. Click on "Training Profile and Certification Form for Compliance Policies and Procedures."
    8. Print the following forms:
      a. Employee worksheet.
      b. Function specific training materials.
        i. Technical staff members complete the form for "Lab Medical/Technical; Quality."
        ii. Non-technical staff members complete the form for "Phlebotomy."
  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 and return a copy to the Compliance Department for documentation.

n. 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.
  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.

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

p. Provide the employee his/her Sunquest password and logon information.
   i. Have the employee sign the LIS Security Agreement form.
   ii. Place the signed agreement in the employee's personnel file.
   iii. Give a copy of the LIS username to the employee and instruct the employee to keep the paperwork until requested by his/her trainer.

q. 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.

r. 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.

s. 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.***

t. 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.
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

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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™"
B. Specimen Processing Procedure: FES Password
C. Form: Employee Information Form (AG.F238)
D. Form: ID Badge, Building Access, and Kronos Registration
E. Form: Request for Replacement Proxy Card

7. REFERENCES

None

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes GEC.L32,SGAH.L35,WAH.L34 v002		
000	9.24.2014	Section 5: Updated process for notifying the employee of the training schedule. Deleted process for in-person NEOP and replaced with online instructions. Added instructions for I-9 verification, ID badge request, and prox card request. Updated NEOP compliance requirements. Section 6: add forms Section 9: form moved to section 6 Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13.	SCodina	LLoffredo, RSanLuis

9. ADDENDA AND APPENDICES

None

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