

# Virtual Onboarding Learning Management System Provider Recruitment

PRESENTED BY

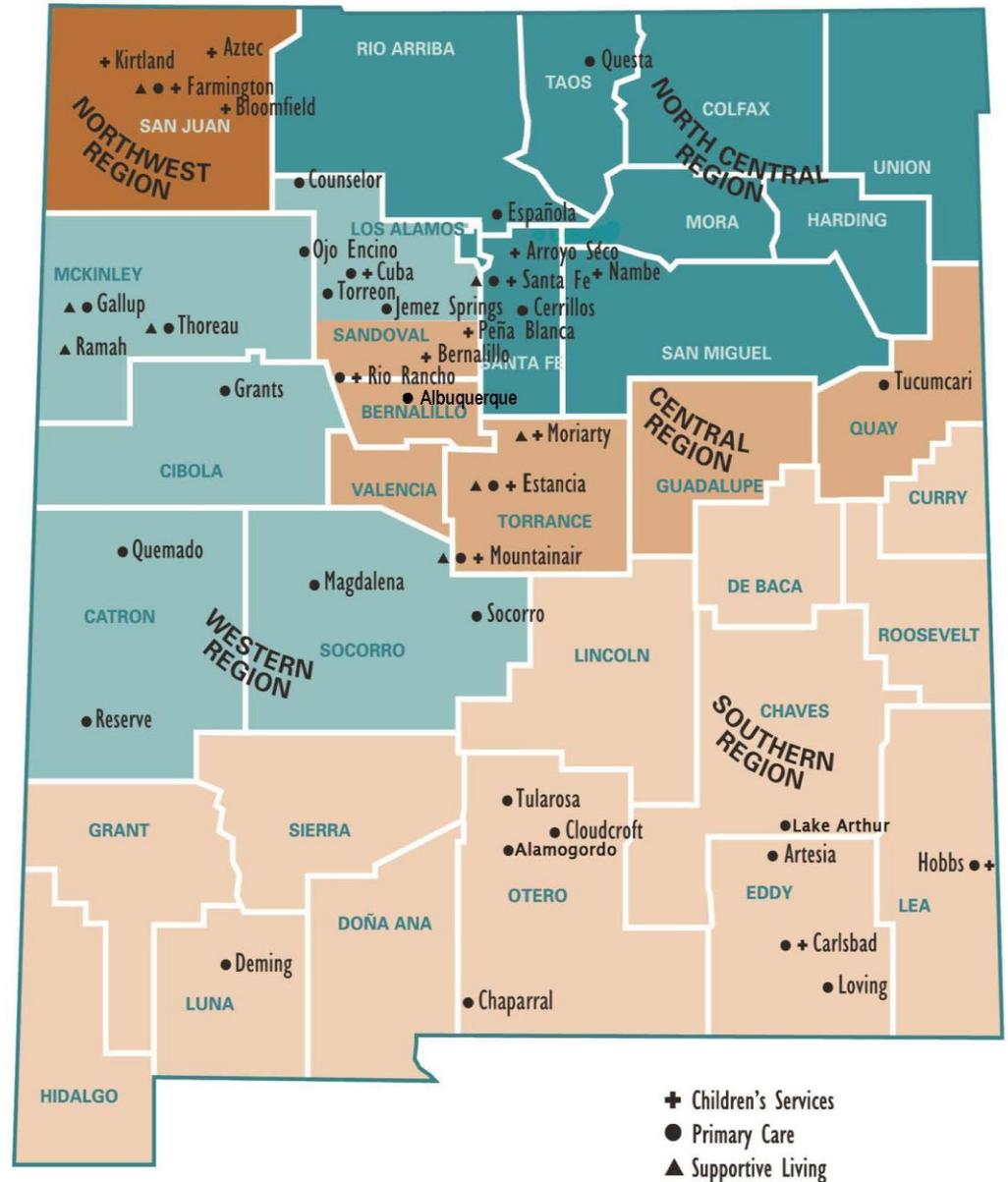
STEVEN C. HANSEN, PRESIDENT & CEO

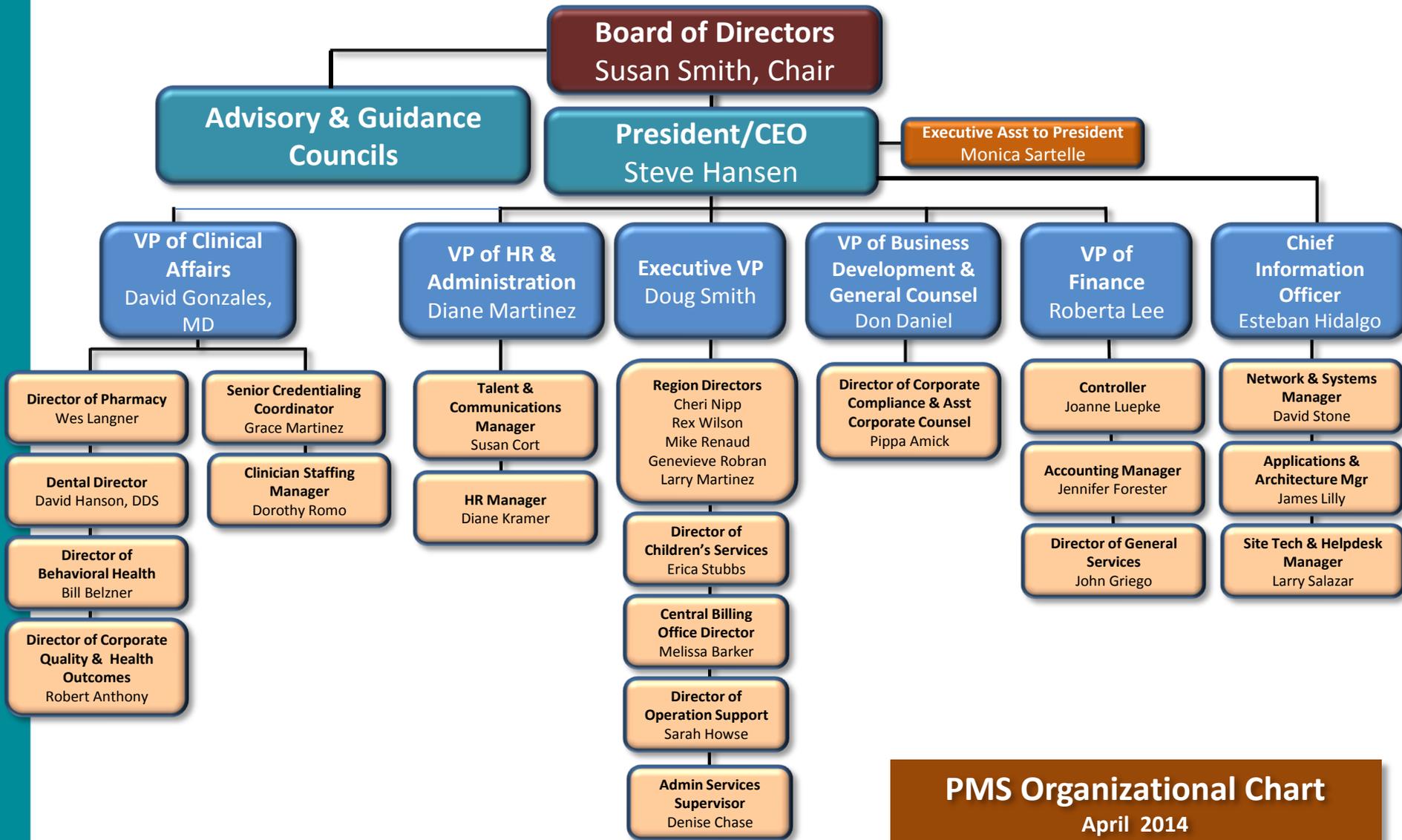
DIANE MARTINEZ, VP OF HUMAN RESOURCES & ADMINISTRATION

APRIL 25, 2014

# Presbyterian Medical Services

- Incorporated 1969
- 1,153 Employees
- 94 Facilities, 38 Communities
- Budget \$90 Million
- Lines of Business
  - Children's Services
  - Home Care and Hospice
  - Adult & Child Developmental Disabilities
  - Traditional Healing Program
  - Residential Treatment Center
  - Senior Centers
  - FQHC/CHC
    - Medical, Dental & Behavioral Health
    - 330 (e) & (h)
    - 65,000 Users
    - 300,000 Encounters
    - 50 Clinic Sites
- 500 Miles Between Furthest Sites
- 300 Miles From Central Office to Furthest Sites





**PMS Organizational Chart**  
April 2014

# VIRTUAL ONBOARDING BUSINESS OPPORTUNITIES

- Engage New Hires with Personalized Onboarding Experience to Decrease Turnover
- Reduce Onboarding Administration Costs
- Simplify Onboarding Management for all Key Stakeholders
- Extend Onboarding Past Day One

# ENWISEN VIRTUAL ONBOARDING FEATURES & BENEFITS

*Our robust, multi-faceted onboarding system allows us to better.*

- **Acclimate** new hires to culture, policies, benefits
- **Automate** process workflow for key stakeholders
- **Integrate** all relevant data and systems
- **Comply** with policies, laws, and regulations

# ROBUST FUNCTIONALITY

- Quickly engages new hires
- Decreases new employee turnover
- Reduces cost per new hire
- Streamlines processes – time spent more efficiently
- Consistent onboarding experience
- Facilitates Regulatory requirements
- Data interface with Lawson HRIS, JOBS@PMS, PMS Intranet & LMS
- Accelerates productivity

# VIRTUAL PREBOARDING & ONBOARDING TOURS

- Preboarding Tour – Completed before hire date and includes welcome video, W-4, I-9, emergency contact info, direct deposit, first day expectations
- Onboarding Tour - Completed during first week and includes company policies, introduction to organization structure and leadership, benefits information, regulatory requirements, completion of acknowledgements and forms with electronic signatures
- To ensure each employee sees the right step, tour groups are defined by meta-data, such as: FTE, status, job codes, and program, all of which place new hires in the correct tour.

# PROJECT PLAN

- Created project team from HR & IT – one year project
- Reviewed current onboarding process and mapped out new process
- Designed tour steps (screens employees will see)
- Analyzed content of 290 job descriptions and created mapping documentation for each tour group – 90 unique groups created
- Developed “smart” forms and workflow processes
- Created interface with HRIS, LMS and other external systems
- Mapped out user roles and implemented systems security
- Created 20 virtual training modules to interface with system
- Developed and implemented training plan for HR staff and Supervisors – screencasts, newsletters, WebEx and email tips



## COST

- One-time implementation fee \$33,795
- Cost of additional “smart form” \$5,000
- Annual subscription fee \$15,000

## ROI ESTIMATE FOR PMS

- 5% reduction in turnover \$475,000
  - ✓ 55 new hires
- Less New Hire & Admin costs \$75,000
  - ✓ 2 days/hire
- Less travel \$100,000
  - ✓ 350 hires/yr
- Compliance **Priceless**

# HOW IT WORKS

## WELCOME EMAIL

Welcome to Presbyterian Medical Services! Please complete your Preboarding tour - Message (HTML)

File Message Adobe PDF

Ignore X Reply Reply All Forward Meeting More

Junk Delete

Delete Respond

Quick Steps

Move

Rules OneNote Actions

Mark Unread Categorize Follow Up

Tags

Translate Select

Find Related

Zoom

From: hr@donotreply.org  
To: Diane Kramer  
Cc:  
Subject: Welcome to Presbyterian Medical Services! Please complete your Preboarding tour

Welcome to Presbyterian Medical Services! We are excited that you will be joining our organization. In order to prepare for your first day of work, we need you to complete the preboarding tour. Please click on the link below to begin this process.

User ID : 88999  
Password: Welcome1! (You will be prompted to change your password the first time you log into the system. Remember your User ID and password as you will need it to access the system.)  
Organization: presbyterianmedicalservices

**The online Preboarding tour must be completed no later than the Friday before your first day of work - if it is not completed on time, your start date may be delayed. Ask your supervisor or Human Resources at (505) 820-3480.**

[Click here to Login](#)

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# HOW IT WORKS LAUNCH PAGE

## Welcome to Presbyterian Medical Services



Bienvenidos



Welcome to Presbyterian Medical Services, a not-for-profit organization founded in 1969 based on a mission to provide integrated healthcare, education and human services to underserved communities throughout New Mexico.

You are joining a team of dedicated individuals that is committed to fulfilling the PMS mission. Employees' skills, professionalism and engagement have made our programs exceptionally successful and your contributions can help bring greater success in the future. We at Presbyterian Medical Services look forward to working with you and anticipate that you will have a challenging and rewarding experience.

We invite you to view a welcome message from Steven C. Hansen, President/CEO of PMS. Then, begin your onboarding tour. We're glad you're here!

[PMS Welcome Video](#)



### Preboarding Tour

0 of 9

Status: In Progress

Due By: 05/02/2014

Next Step: Introduction to

[Get Started](#)

# HOW IT WORKS

## PREBOARDING – TOUR STEP

Timothy Tester |



PRESBYTERIAN MEDICAL SERVICES

Building a Healthier State™

Preboarding Tour

Welcome: Timothy Tester



**Hire Date:**

05/05/2014

**Job Title:**

Medical Assistant II

**Supervisor:**

DIANE MARTINEZ

**Program:**

Farmington Community  
Health Center

**Program Phone:**

505-327-4796

Ready

**Tour Steps**

Introduction to Onboarding

Preboarding Tour

Personal Information

Emergency Contact

Direct Deposit

W-4

I-9

Preparing for Your First Day

Thank you

### Introduction to Onboarding



#### Employee Onboarding

During your first few weeks of employment, you will participate in Employee Onboarding, a sequence of activities that acclimates you to your position and program, captures documentation, and provides needed training. Employee Onboarding is comprised of: Virtual Preboarding & Onboarding tours, Program Orientation, New Employee Orientation, and program-specific regulatory training.

#### Preboarding & Onboarding Tours

Preboarding & Onboarding tours are completed before hire and during your first day, respectively. Tours are comprised of a series of steps (screens) that you will navigate, which provide information about PMS, policies & procedures, benefits, position specifics, and other important processes. In addition, you will be asked to complete, acknowledge and electronically sign various forms, all of which will be used to complete your personnel file.

#### Program Orientation

On your first day, before you complete the onboarding tour, you will receive a tour of the facility, be introduced to other employees, and meet with your supervisor to review your job description. You will need a copy of your job description to complete your onboarding tour. The program orientation will continue throughout your first several weeks of employment.

#### New Employee Orientation

Within the next two weeks, you will attend PMS' one-day new employee orientation at Central Office in Santa Fe, NM. At this session, you will participate in a variety of training, including: customer service, valuing diversity, teambuilding, and other important topics that will help you succeed at PMS. Your supervisor will schedule you for the next available session.

#### Program-Specific/Regulatory Training

Based on your position, you may be required to complete additional training during your first two weeks. Your supervisor will explain these training requirements.



Exit and Continue Later

Previous

# HOW IT WORKS

## ONBOARDING – TOUR STEP



PRESBYTERIAN MEDICAL SERVICES

Building a Healthier State™

Onboarding Tour  
Welcome: Tester Test



**Hire Date:**  
04/23/2014  
**Job Title:**  
MEDICAL DIRECTOR  
**Supervisor:**  
DIANE KRAMER  
**Program:**  
ESPERANZA MEDICAL  
CENTER  
**Program Phone:**  
505-384-2777

Completed 14 of 17

### Tour Steps

- ✓ [Onboarding Tour](#)
- ✓ [Mission, Vision, and Values](#)
- ✓ [Corporate Leadership](#)
- ✓ [Lines of Business](#)
- ✓ [Employment Expectations](#)
- ✓ [TB Testing Requirements](#)
- ✓ [Hepatitis B & Pertussis](#)
- ✓ [Human Resources Training](#)
- ✓ [Outside Employment](#)
- ✓ [Policies & Procedures](#)
- ✓ [Radiation Standards](#)
- ✓ [Your Benefits at PMS](#)
- ✓ [Malpractice Insurance](#)
- ✓ [When is Payday?](#)

Training at PMS

Employees Make the Difference

Next Steps in Onboarding

## Training at PMS



### Training at PMS

Training is an essential part of working at PMS. Depending on your position, you may need to complete required trainings such as HIPAA, safety, abuse & neglect detection & reporting, or modules specific to your position, such as: Comprehensive Community Support Services. Training related to Nextgen, PMS' electronic medical record system, is provided by the Patient Care & Training Application Team located at the Central Billing Office. You may also participate in soft-skill training opportunities during your employment. PMS utilizes a variety of training delivery methodologies, including virtual training, self-paced modules, and in-person training. The HR training staff is ready to help you with your training needs, including requests for training, accessing resources, and using the PMS Employee Learning Center. Call the Learning & Development Department at 505-954-2331 if you have any questions.

### Management Training

New managers must complete the Management Training Curriculum during the first six months of employment. These courses center on fundamental PMS procedure and supervisory skills. The curriculum includes modules located on the PMS Employee Learning Center, and an Accounting for Managers training presented at the Central Billing Office. New managers will receive an invitation to participate in the Management Training Program from the Learning & Development Department. In addition to the required curriculum, managers are also encouraged to review the Leadership Excellence training resources posted to the PMS Employee Learning Center.

Following completion of this onboarding tour, you will be reminded to return to the PMS Employee Learning Center to complete any remaining required online training, if applicable to your position.



# HOW IT WORKS

## SMART FORM -

Onboarding Tour  
Welcome: Tester Test



### Malpractice Insurance

**Hire Date:**  
04/23/2014  
**Job Title:**  
MEDICAL DIRECTOR  
**Supervisor:**  
DIANE KRAMER  
**Program:**  
ESPERANZA MEDICAL  
CENTER  
**Program Phone:**  
505-384-2777

Completed 14 of 17

#### Tour Steps

- ✓ [Onboarding Tour](#)
  - ✓ [Mission, Vision, and Values](#)
  - ✓ [Corporate Leadership](#)
  - ✓ [Lines of Business](#)
  - ✓ [Employment Expectations](#)
  - ✓ [TB Testing Requirements](#)
  - ✓ [Hepatitis B & Pertussis](#)
  - ✓ [Human Resources Training](#)
  - ✓ [Outside Employment](#)
  - ✓ [Policies & Procedures](#)
  - ✓ [Radiation Standards](#)
  - ✓ [Your Benefits at PMS](#)
  - ✓ [Malpractice Insurance](#)
  - ✓ [When is Payday?](#)
  - [Training at PMS](#)
- Employees Make the Difference  
Next Steps in Onboarding

Upon employment, all licensed professionals are provided with occurrence-based professional malpractice insurance in the amounts of \$1 million / \$9 million in coverage, paid for by PMS. In order for your coverage to begin, we need the following information which will be submitted on your application for malpractice insurance coverage.

#### Please verify or complete the information below:

**First Name:**   
**Middle Name:**   
**Last Name:**   
**Hire Date:**   
**Date of Birth:**   
**Provider Type:** \*

#### NM Licensure Information:

**State:** \*   
**License Type (e.g. physician, RN):** \*   
**License Number:** \*   
**Current Status:** \*

#### For Prescribing Providers:

**License Type:**   
**Federal DEA License Number:** \*   
**Current Status:** \*

#### For Prescribing Providers:

**License Type:**

Ready



Open Form

# HOW IT WORKS

## SMART FORM -



### CPG ADD HEALTH CARE PROVIDER FORM

Presbyterian Medical Services

610340

Name of Clinic/Organization (please print)

Policy Number

**Directions:** Please complete this form to request that a health care provider be endorsed onto the clinic's/organization's NORCAL policy. Use the Remarks section if you need additional space or attach additional pages as necessary. Please ensure that you sign and date the form on page 2.

**NOTE:** If this is a request to add a health care provider who is administering anesthesia (other than topical or by means of local infiltration) or performing deliveries, abortions and/or any procedure specified as an intermediate procedure or surgery, oral surgery or major surgery, he or she must also complete and submit the CPG Health Care Provider Application.

1. Please identify the effective date of the addition:

04      23      2014      12:01 a.m. Local Time  
Month      Day      Year

2. Please complete the following regarding the health care provider:

Name: Test      Tester  
Last      First      Middle

Date of Birth (mm/dd/yy): 08/25/1963

Provider Type:  MD     DO     DDS     DMD     Certified Registered Nurse Anesthetist  
 Certified Nurse Midwife     Direct-Entry/Licensed Midwife     Nurse Practitioner  
 Perfusionist     Physician Assistant     Podiatrist

3. If the health provider is a physician, please identify each medical specialty/field of medicine in which the physician will practice and

# HOW IT WORKS



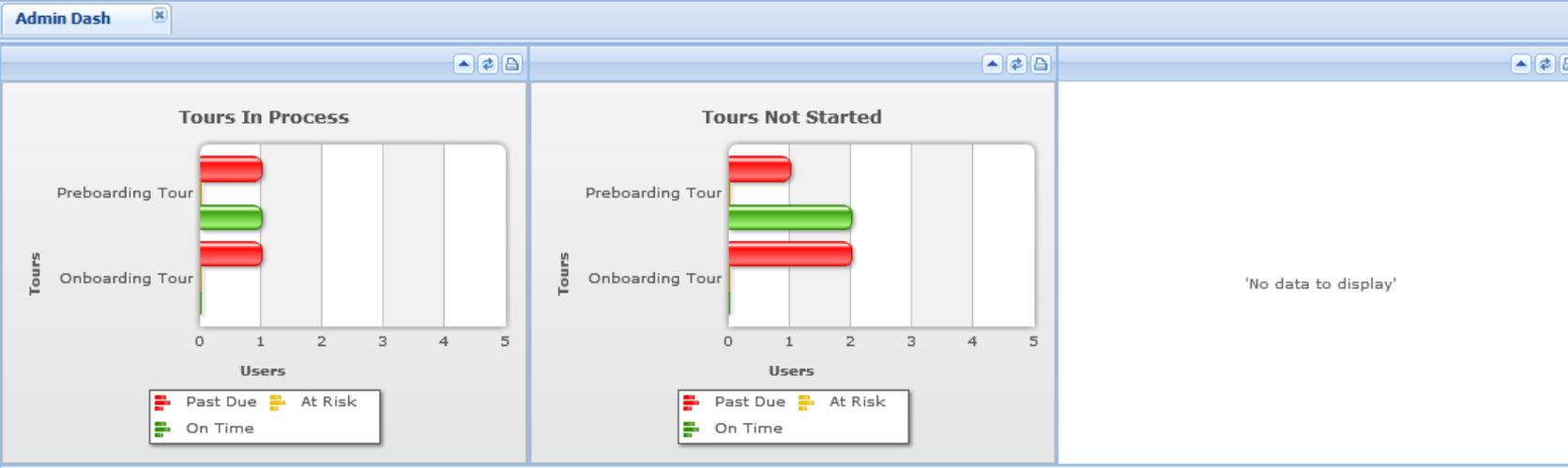
## ADMIN DASHBOARD

Diane Kramer | [Logout](#)

Building a Healthier State\*

[Home](#)

- Onboarding Navigation Menu
- Views
  - Admin Dash
  - Admin Console
  - My Inbox
  - Manager Console
  - Manager Dash
  - Archives
  - Analytics & Reports
- Settings
  - Admin Inbox
  - My Inbox Proxies
  - Proxy Administration
  - Template Editor
  - Manage New Hires



# HOW IT WORKS

## ADMIN CONSOLE

Diane Kramer | L

 **Home** 

**Onboarding Navigation Menu**

**Views**

-  Admin Dash
-  Admin Console
-  My Inbox
-  Manager Console
-  Manager Dash
-  Archives
-  Analytics & Reports
- Settings**
-  Admin Inbox
-  My Inbox Proxies
-  Proxy Administration
-  Template Editor
-  Manage New Hires

Admin Dash  Admin Console 

All Tours...  Tour Status...  Tour Schedule...  Workflow Status...  Group...  Name    

Select All  Deselect All  Delete  Archive  Refresh

	Name	Tour	Ver	Tour Status	Progress	%	Tour Due Date	Workflow Status	Data Status	Actions
<input type="checkbox"/>	<a href="#">Tester Test</a>	Onboarding Tour	1	In Process	<div style="width: 82%;"><b>Completed 14 of 17</b></div>	82%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">GREGORY MAT...</a>	Preboarding Tour	1	Not Started	<div style="width: 0%;"><b>Completed 0 of 9</b></div>	0%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">ANNAVIE PESH...</a>	Preboarding Tour	1	Not Started	<div style="width: 0%;"><b>Completed 0 of 9</b></div>	0%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">CLAUDINE BOYD</a>	Preboarding Tour	1	Not Started	<div style="width: 0%;"><b>Completed 0 of 9</b></div>	0%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">JANINE MCKENNA</a>	Preboarding Tour	1	Not Started	<div style="width: 0%;"><b>Completed 0 of 9</b></div>	0%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">BRENT SCHRA...</a>	Preboarding Tour	1	Complete	<div style="width: 100%;"><b>Completed 9 of 9</b></div>	100%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">BRADI WESTON</a>	Preboarding Tour	1	Complete	<div style="width: 100%;"><b>Completed 9 of 9</b></div>	100%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">BRENDA MARIS...</a>	Preboarding Tour	1	Complete	<div style="width: 100%;"><b>Completed 9 of 9</b></div>	100%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">JIM SISNEROS</a>	Preboarding Tour	1	Complete	<div style="width: 100%;"><b>Completed 9 of 9</b></div>	100%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">KRISTA SCORS...</a>	Preboarding Tour	1	Complete	<div style="width: 100%;"><b>Completed 9 of 9</b></div>	100%	04/25/2014	Not Started	Pending	 
<input type="checkbox"/>	<a href="#">KAIYA UPTON</a>	Onboarding Tour	1	Complete	<div style="width: 100%;"><b>Completed 17 of 17</b></div>	100%	04/23/2014	Not Started	Sent	 

Page 1 of 12   

Displaying 1 -

Tour Steps: 9 Workflows: 1 Messages: 1 User Details

**BRENT SCHRADER - Preboarding Tour**

Step Status	Step	Date	Time Spent
✓	<a href="#">Introduction to Onboarding</a>	04/03/2014	03:27
✓	<a href="#">Preboarding Tour</a>	04/03/2014	00:36
✓	 <a href="#">Personal Information</a>	04/03/2014	03:11
✓	 <a href="#">Emergency Contact</a>	04/03/2014	05:28
✓	 <a href="#">Direct Deposit</a>	04/03/2014	04:53
✓	 <a href="#">W-4</a>	04/03/2014	01:07
✓	 <a href="#">I-9</a>	04/03/2014	01:22

# HOW IT WORKS

## I-9 VERIFICATION

Workflow Approval Form

I-9 Smart Form Workflow: I9 Approval Workflow Due In: 27 Days [Post A Message](#) [Message Bo](#)

**Details:** << Instructions ★ I-9 ✕

Employee First Name: Timothy

★ Forms Requiring Action

★ LQ

### Form I-9 Employment Eligibility Verification

List A: Documents that establish both Identity and Employment Authorization.

**Document Title:** U.S. Passport or Passport Card

**Issuing Authority:** \* United States Department of State

**Expiration Date:** 01/01/2018 mm/dd/yyyy

**Passport Number:** \* 093824729378

Additional List A Document (if any).

**Document Title:** Select...

**Issuing Authority:**

**Document Number:**

**Expiration Date (if any):** mm/dd/yyyy

### Certification

I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

**Employee's First Day of Employment:** \* 05/05/2014 See instructions for exemptions.

**Name of Employer or Authorized Representative:** \* Diane Martinez

**Date:** 04/10/2014

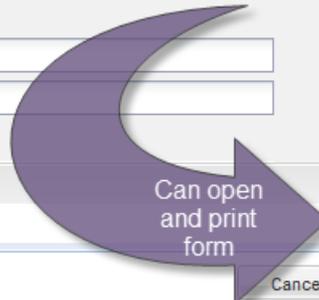
**Title of Employer or Authorized Representative:** \* Vice President of Human Resources

**Last Name (Family Name):** \* Martinez

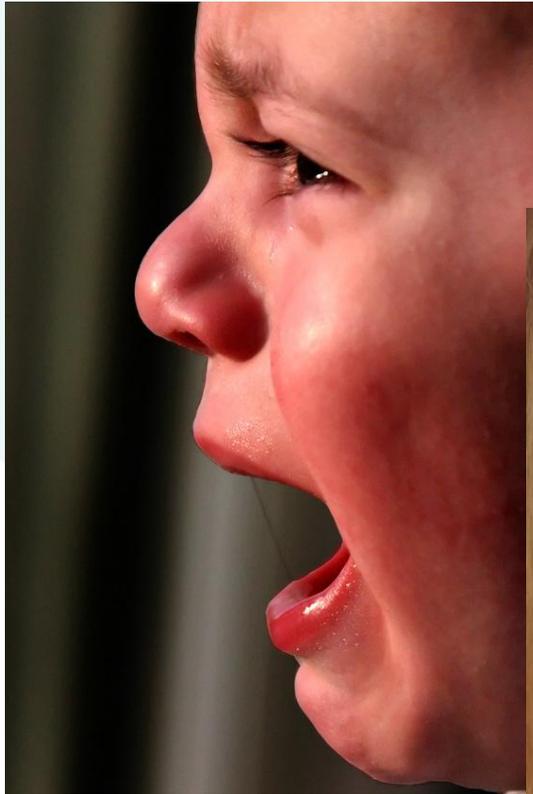
**First Name (Given Name):** \* Diane

Ready

Open Form Save Cancel Return Approv



# SUPERVISORS BEFORE ONBOARDING



# SUPERVISORS AFTER ONBOARDING



# RESULTS & LESSONS LEARNED

## Positive Outcomes

- Hours of time previously spent by managers saved
- More engaged new hires
- Consistent Orientation
- Corporate Orientation reduced to one day
- Elimination of data entry and printing of forms
- Compliance

## Lessons Learned

- Large investment in project up front leads to great outcomes
- Does not necessarily save HR staff time - data systems need management

# LEARNING MANAGEMENT SYSTEM



The screenshot shows the login interface for the Presbyterian Medical Services Employee Learning Center. At the top, there is a red navigation bar containing the PMS logo, a banner of New Mexico-themed images (including a mesa, a historical map, and a hot air balloon), and a search bar with 'GO' and 'remember me' options. Below the navigation bar is a white login area with the PMS logo and the text 'PRESBYTERIAN MEDICAL SERVICES' and 'Building a Healthier State®'. A welcome message reads 'Welcome to the Presbyterian Medical Services Employee Learning Center'. At the bottom right, it says 'Powered by eLogic eSential LMS 9.2'.

# PMS – eLogic Learning Management System (LMS)

*An industry-leading online tool for managing our eLearning and overall training program across the entire organization.*

## QUALITY

- Creates and promotes a high performance culture
- Aligns learning with PMS's immediate and long-term needs
- Helps PMS stay competitive in a rapidly changing healthcare environment

## COMPLIANCE

- Helps satisfy regulatory training requirements
- Saves time by facilitating tracking & reporting for audits
  - ➔ We anticipate 75% time savings for 10-15 audits per year once systems are fully implemented.
- Reduces risks of funding loss, penalties and/or fines

# ROBUST FUNCTIONALITY

- Ability to manage statewide training delivery
- User-friendly interface
- Required training enrollments – for example, single modules such as annual safety training or groups of modules (Learning Paths & Compliance Paths)
- Blended Learning for instructor-led sessions, online modules, & library items
- Automated email reminders
- Robust Reporting Engine (Standard & Adhoc)
- External training certificate uploads
- Data Integration with Lawson HRIS
- Accessible from any computer with Internet access
- Training Calendar

# PROJECT PLAN

- Created **project team** from IT, HR & Accounting
- Established list of **needed & desired features**
- **Selected LMS** (from 6) based on features and cost factors
- Performed HRIS data review to create the **organizational and geographic hierarchies**
- Designed the “look” and **built the LMS screens**
- Analyzed content of current LMS & **prioritized modules** for gradual transfer to new LMS
- Created **User Manual**
- **Announced changes** to employees by email, newsletter, live presentations, WebEx’s and ongoing weekly tips

# COSTS

- One-time implementation fee \$15,000
- Annual cost per user \$20
- Annual cost for 1,200 users \$24,000



# RETURN ON INVESTMENT

- **Decreases:**

1. Need for costly in-person training which carries high travel and time-lost costs
2. Likelihood of regulatory fines & funding loss related to training non-compliance
3. Turnover costs through employee development and support
4. Total costs of training materials

- **Increases:**

1. Employee productivity & engagement
2. Employee professional development & career opportunities
3. Patient/client satisfaction (better informed workforce)

DEMO

<http://pmstraining.elogiclearning.com>



- Homepage
- Browse Training
- Training Calendar
- Transcript
- Profile
- Dashboard
- Required Training Lists
- Onboarding Info

Julian's Homepage

---All---

Go



Welcome to the PMS Employee Learning Center. For detailed instructions, please see the User Manual on the Help page.

Be sure to check the "My Registrations" and "My Notifications" tabs below for your assigned training. New employees, please click on "Onboarding Info" in the Left Menu for instructions.

Learning & Development Unit, [training@pmsnet.org](mailto:training@pmsnet.org), 505-954-2331



My Registrations

My Notifications

Featured

Prerequisite

Mandatory

PMS New Employee Onboarding - OB0024



LearningPath

Due Date: 04/26/2014 Registered: 04/24/2014

Onboarding training modules for new hires.

[More Details](#) | [Expand](#) | [Mandatory](#)

CCSS - Clinical & Psychosocial Needs of Target Populations - BH0047

LearningPath

Registered: 04/24/2014



PRESBYTERIAN MEDICAL  
Building a Healthier

- Homepage
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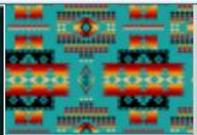
### HEALTH CENTERS REQUIRED TRAINING LIST

TRAINING	AGENCY/POLICY	STAFF	TRAINER	TIMELINE	DOCUMENTATION
<b>ALL DEPARTMENTS</b>					
Initial Onboarding & Orientation	Joint Commission Standard: HR.01.04.01	All staff	Corporate Staff & Program Staff	Upon Hire	<u>Corporate</u> : Reports indicating online Onboarding completion and Orientation sign-in sheets are kept in Central Office - Human Resources binder.
Safe Sharps	OSHA Standard: 1910.1030 & 1910.1200	Staff that handle safe sharps (medical & dental)	Supervisor (return demonstration)	Upon Hire & Annual	<u>Upon Hire</u> : Documented in Initial Competency Form (sent to HRIS) <u>Annual</u> : Return Demonstration completed and acknowledged in PMS Learning Center. Certificate kept in site training file. Completion reports kept at Central Office.
Bloodborne Pathogens / Infection Control	OSHA Standard: 1910.1030 & 1910.1200	"At Risk" staff (determined by JD)	Self-directed	Upon Hire & Annual	<u>Upon Hire</u> : Completion reports for required online module are kept at Central Office - PMS Learning Center. <u>Annual</u> : Lesson completed through PMS Learning Center. Certificate printed and kept in site training file. Completion reports kept at Central Office - PMS Learning Center.

Revised 9-11-13 | HEALTH CENTERS REQUIRED TRAINING LIST | 1



- Homepage
- Browse Training
- Training Calendar
- Transcript
- Profile
- Dashboard
- Required Training
- Onboarding Info

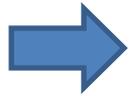


Go



(11)

requirements

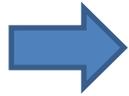


## Live the Mission - Multi-cultural Healthcare Tips - LE0050

Courses

Slide presentation of tips for multi-culturally sensitive healthcare service delivery.

[More Details](#) | [Register](#)

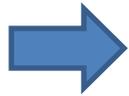


## Live the Mission - Multicultural Principles for Head Start - LE0056

Library - Electronic

80-page booklet describing Multicultural Principles for Head Start

[More Details](#) | [Check-Out](#)

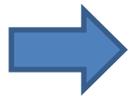


## Promote Financial Responsibility - The Thrifty Manager - Cutting Costs Article - LE0067

Library - Electronic

Article about how to cut program costs.

[More Details](#) | [Check-Out](#)



## Promote Financial Responsibility - Basic Finance for Non-Financial Managers - LE0065

Library - Electronic

10-page article describing basic financial concepts and terms for non-financial managers.

[More Details](#) | [Check-Out](#)

[Training Calendar](#)  
[Transcript](#)  
[Profile](#)  
[Dashboard](#)  
[Required Training Lists](#)  
[Onboarding Info](#)

Calendar Search

◀ **April, 2014** ▶

Month
Day

30	31	01 Apr	2 New Employee Corporate Orientation	3	4	5
6	7	<div style="border: 1px solid gray; padding: 5px;"> <p>Select Event <span style="float: right;">✕</span></p> <p>Description:</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p>4/16/2014      8:00 AM - 3:00 PM</p> <p>Central Office - Orientation Rm Bldg 1 Upstairs</p> <p>Instructor:      Ortiz, Julian</p> <p>Instructor Email:    julian_ortiz@pmsnet.org</p> <p>Seats Available:    16</p> </div> <p style="text-align: right; color: red;"><a href="#">More Details</a>   <a href="#">Register</a></p> </div>		11 First Aid Northwestern Region Administration -	12	
13	14	18	19	20	21	22
23	24 NG CAR Training Central Billing Office - Computer Training Lab	25 Cardiopulmonary Resuscitation Northwestern Region <a href="#">more...</a>	26	27	28	29
30 New Employee Corporate Orientation Central Office -	01 May	2	3			

Print - Windows Internet Explorer provided by Presbyterian Medical Services

http://pmstraining.elogiclearning.com/UI/PrintDocument.aspx?hFlkdcpUDyd0DAP7rJ0F6GWKbcqdNgdVrbTIfAY=

Print



**PMS**  
PRESBYTERIAN MEDICAL SERVICES  
*Building a Healthier State*

## Certificate of Completion

Is Awarded to:  
**Julian Ortiz**

For successful completion of  
**Safety & Security**

on  
04/17/2014


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Learning & Development Administrator

0.25 Hours


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Talent & Communications Manager

Page Size: 25 1 items in 1 pages

Training

Hide Edited

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- Yes
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- Homepage
- Browse Training
- Training Calendar
- Transcript
- Profile
- Dashboard
- Required Training Lists
- Onboarding Info

Julian's Homepage

---All---



Welcome to the PMS Employee Learning Center. For detailed instructions, please see the User Manual on the Help page.

Be sure to check the "My Registrations" and "My Notifications" tabs below for your assigned training. New employees, please click on "Onboarding Info" in the Left Menu for instructions.

Learning & Development Unit, [training@pmsnet.org](mailto:training@pmsnet.org), 505-954-2331

My Registrations

My Notifications

Featured

**P** Prerequisite

**M** Mandatory



### CCSS - Clinical & Psychosocial Needs of Target Populations - BH0047

LearningPath

Registered: 04/24/2014

Clinical & Psychosocial Needs of Target Populations Learning Path for CCSS personnel.

[More Details](#) | [Expand](#)



### CCSS 90 Day Compliance Path - CCSS0001

CompliancePath

**M** **Compliance Period: 4/24/2014 to 7/23/2014 Registered: 04/24/2014**

Curriculum for Comprehensive Community Support Services new hires.

[More Details](#) | [Complete Training](#) | [Mandatory](#)

Report View - Windows Internet Explorer provided by Presbyterian Medical Services

http://pmstraining.elogiclearning.com/UI/StandardReportView.aspx?rn=avalonInternalCategory\_DoNotUse\LearningPathDetailsStat

PDF Print HTML Print Print RTF | Results 100



## Learning Path Detail Report

Learning Path: CCSS - Clinical & Psychosocial Needs of Target Populations - Learning Path  
 Hierarchy Type: Organization  
 Hierarchy Value: Too many values to display.  
 User Status: Active Only

Learning Path	LP Status	First Name	Last Name	Curriculum Name	Status	Registration Date	Completion Date	Due Date
CCSS - Clinical & Psychosocial Needs of Target Populations	Dropped	ALTHEA	STEVENSON	CCSS - Clinical & Psychosocial Needs of Target Populations	Dropped	2/3/2014		5/4/2014
CCSS - Clinical & Psychosocial Needs of Target Populations	Dropped	AMIEE	WALKER	CCSS - Clinical & Psychosocial Needs of Target Populations	Dropped	2/3/2014		5/4/2014
CCSS - Clinical & Psychosocial Needs of Target Populations	Dropped	AMY	CHAPMAN	CCSS - Clinical & Psychosocial Needs of Target Populations	Dropped	2/3/2014		5/4/2014
CCSS - Clinical & Psychosocial Needs of Target Populations	Complete	AMY	CHAPMAN	CCSS - Clinical & Psychosocial Needs of Target Populations	Complete	2/3/2014	2/6/2014	5/4/2014

Cancel Back Submit Finish

- **Biggest challenges:**

- Data analysis, mapping & management to create the organizational and geographic hierarchies
- Educating staff that ALL internal training now needs to “go through” the LMS
- Reminding staff to upload external training certificates

- **Lessons Learned:**

- While audits are more efficient, a robust LMS still requires significant HR staff time for set up and ongoing maintenance functions

- **Positive Outcomes:**

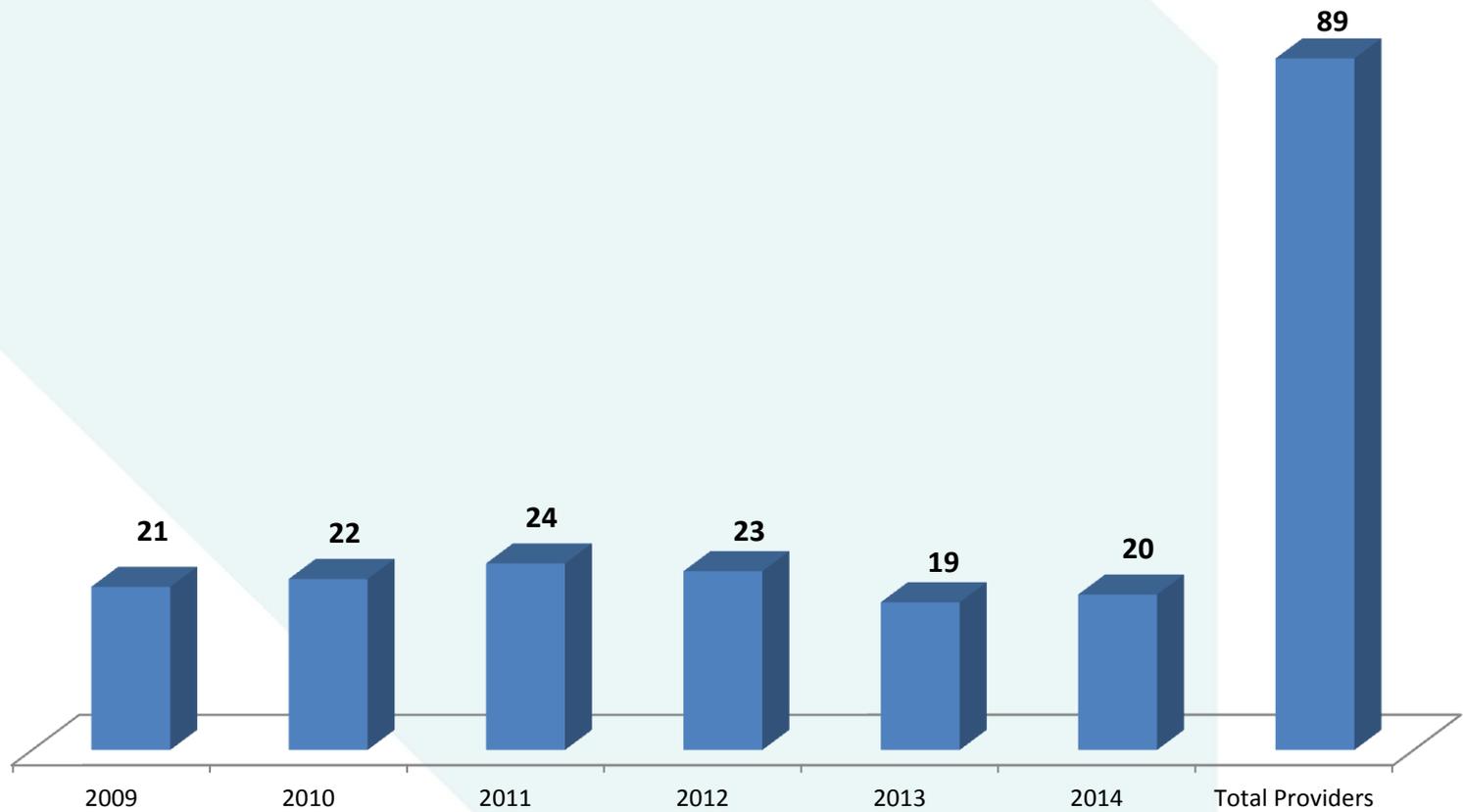
- Employees and supervisors have better understanding of training expectations
- Data is there when we need it – less last minute activity preparing for audits

# Provider Recruitment



APRIL 25, 2014

# CLINICIANS RECRUITED 2009 - 2014



# PMS – RECRUITMENT CORNERSTONES

\*RELATIONSHIPS \*PIPELINE \*PREPARE \*APPRECIATE

## “BARRIERS” “HURDLES” AND “CLEARING THE FENCE”

- Economics – Practitioner indebtedness, compensation, fishing in a shallow pond, rural practices & local delivery system
- Language & Culture – “Outsider” mistrust, conflicting expectations
- Proximity of Services – Geographic isolation, Provider Resources
- **“Clearing the Fence”**
  - Advocate Loan Repayment Programs
  - Be Competitive
  - Know your communities and engage
  - Communicate provider needs to your leaders

## RELATIONSHIPS

**IN 2013 - PMS RECRUITMENT WORKED WITH NHSC TO IMPROVE HPSA SCORES COMPANYWIDE TO: MEDICAL 18, BH 21, AND DDS 22 ENSURING ALL SITES QUALIFY FOR LOAN REPAYMENT PROGRAM**

- **Engage** in statewide dialogue regarding clinician shortages, and lead in coordinating healthcare workforce recruitment across the state with educators, state funded agencies, colleagues, 3 R-Net, NHSC
- **Develop** relationships with training programs and residencies within your “Wheel States” by, site visit, email needs monthly
- **Research** current clinical environments in your state communities be aware of provider movement and opportunities
- **Enhance** provider experience by providing individual consultation on issues such as employment for spouses, housing, access to education
- **Create** visibility within your DOH on issues such as NHSC, State LRP, J1 visa Waivers

# PIPELINE

## Today's "No" is Tomorrow's "Yes"

- Developed pipeline tracking for all referrals and applicants by discipline
- Established jobsites with National not-for-profit partners, 3 R Net, NHSC, Career MD
- Keep job sites fresh
- Created a share drive for templates, candidates, Matrices for timely response to interested candidates
- ***Keep pipeline "Hot" - email pipeline 4 times annually with current needs***

# PREPARE

*“Hard to overcome a bad first impression”*

- **Timeliness**; e-contact within 24 hours directing candidate to PMS website, Facebook, Y-Tube video, and setting date for telephonic, Skype or Face time meeting with recruiter. **Sell!**
- **Evaluations** go both ways; be prepared to answer questions about the position, the site, the company and community
- **Interview** on-site within 3 weeks; know your candidates needs, prepare your site team and tailor visit
- **Review** of impressions and interest within 48 hours and **Close!**
- **End date** all offers

# APPRECIATE

## “Stay in Touch”

- Your current providers are your best recruiters
- Follow up new hires within 60 days of employment & annually
- Notify all clinicians of loan repayment opportunities and remember to appreciate their service in your emails
- Notify all clinicians of Statewide CME or CEU opportunities
- Attend all Statewide functions for Clinicians



# PMS

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