

Date: _____ Start Time: _____ End Time: _____

Facilitator: _____

I. ROLE CALL (5 min)

Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____
Caregiver Name: _____	Caregiver Signature: _____

II. INTRODUCTIONS (15 min)

Introductions of new professional caregivers and office support team. Make sure the entire office support team is present during this part.

- Professional Caregivers
Name, where they are from, prior caregiving experience, fun fact (what is their favorite and least favorite food) etc.
- Office Support Team
Name, where they are from, prior caregiving experience, fun fact, and their main role at the company.

III. THE COMPANY STORY (10 min)

The year the company started and WHY it was started. Share 1-2 examples of the impact your caregivers have had on the lives of their clients. Share what makes working for your company unique and special, as well as testimonials from your caregiving and office staff.

IV. INTRODUCTION TO THE CLIENT EXPERIENCE (15 min)

- Read the Mission Statement
- Review the Core Values of The Client Experience
Discuss each value and how it applies to the way they should care for their clients.

Professionalism - I am always respectful towards the client and I show up on time, ready to represent my company.
Consistency - I follow each care plan exactly, and always provide the high level of care our clients deserve.
Integrity - I earn the trust of the client, so they never have reason to question my honesty and reliability.
Compassion - I care about the client and put their interests above my own.
Quality-Trained - I seek to improve my skills and take advantage of the quality training provided to me.
Confidence - I go the extra mile with a smile on my face so the client can have confidence in me.

- Hand Out The Client Experience Laminated Pocket Cards

Caregiver Orientation Sample Outline

REFRESHMENT BREAK (30 min)

Provide breakfast or lunch, depending on start time. Use this time to get to know the new caregivers better.

V. CAREGIVER POSITION AGREEMENT REVIEW (45 min)

Visit the Home Care Pulse Resource library in your VANTAGE account for an example of a Caregiver Position Agreement.

Read

Have each caregiver read a portion of the agreement out loud. Take time to review and discuss along the way.

Q&A

Allow time for Q&A with each section of the agreement. Make sure everyone understand the expectations.

Sign

Ensure all new hires and supervisors sign the agreements before continuing on with the orientation.

VI. PROVIDING THE CLIENT EXPERIENCE (90 min)

Now that they've been introduced to what The Client Experience is, use this time to outline how to deliver it through quality of care.

Training Manual Introduction (~45 min, done by Field Supervisor)

Table of Contents Review

Hands on Training

Demonstrate points from the Training Manual. It is best to have a bed, transfer board, and other training props available.

- Confidence discussion and why that attribute is key when taking care of others.
- Proper transferring.
- Bathing.
- Managing incontinence and personal hygiene.
- Managing medications.
- Disease control.
- Basic dementia communication techniques.
- Rubber glove use and policies.
- Etc...

BREAK (10 min)

VII. COORDINATION OF SCHEDULES (10 min)

Expectations

Remind of the expectations when coordinating schedules, as reviewed in the Caregiver Position Agreement.

Roles

Review the roles of the Staffing Coordinator(s).

Communication

Review when to contact the office and how after hours on-call works.

Fill-ins

Discuss how willingness to take additional shifts for fill-in for someone else can be rewarded.

Time Off

VIII. CELL PHONE ETIQUETTE AND RULES (5 min)

Privacy

Do not give your personal cell phone number to clients or their family members.

On-Duty Use

Ensure family members and friends are aware they must only call in the case of an emergency. Keep calls less than one minute.

Texting

Do not text while on shift, unless it is an emergency.

Office Calls

Answer all office calls, in case we have important information to relay to you.

IX. UNDERSTANDING AND USING THE CLIENT CARE PLAN BINDER (30 min)

Sample

Review a sample care plan and discuss the layout, etc.

After Hours Protocol

Give important office contact numbers.

Cell Phone

Reiterate the policies regarding cell phone use.

Emergencies

Advance Directives

Discuss Advance Directives and Do Not Resuscitate (DNR) orders, to ensure all caregivers understand.

Medication Management

Live-In Guidelines (if applicable)

Falls

Documentation Logs

Medication Logs

Time Sheets

Show where they are in the Client Care Plan book so clients and their family members can see.

X. TIMEKEEPING (15 min)

Telephony

Give each new caregiver an instruction card and then demonstrate how it works live.

- Emphasize the importance of not forgetting - they do not get paid, for example.
- Emphasize that the system cannot be fooled.
- If it is not working, call the office.

XI. HUMAN RESOURCES (30 min)

- Health Benefits (if applicable)
- Pay Schedule
 - Payroll dates.
 - Holidays and time and a half.
 - Overtime policy review.
 - Time sheets (when they are due, how to turn in depending on if Telephony is used).
- Sexual Harassment Policy and Rules
- Dress Code
 - Uniforms, when and when not to wear them.
 - If the uniform is not required for a specific client, review of what to wear instead.
 - Scrubs.
 - Gloves

XII. ONGOING TRAINING EXPECTATIONS (15 min)

- Upcoming Training

Hand out a list of training subjects for the next 6 months.
- Typical Format

Review the usual outline and format of trainings. Get them excited about the trainings, socializing, food, incentives etc. If possible, show a brief video clip of one of your ongoing training sessions, designed to promote enthusiasm.
- Schedules

Review how the Care Coordinators schedule them for 1 of 3 possible training timeslots each month and the importance of accepting one of them.
- Mandatory

Inform the new caregivers it is mandatory to attend at least 50% of trainings as an employee.

XIII. MATERIALS (10 min)

Hand out gloves, uniforms to those who has shifts, and have them sign the Acknowledgement of Training.

XIV. REFERRAL PROGRAMS (5 min)

- Client Referral Program
- Employee Referral Program

XV. Q&A