

**XYZ VALLEY HOME HEALTH
THEORETICAL ORIENTATION CHECKLIST**

Welcome to [XXX] Home Health! We hope that this orientation checklist helps provide structure, clarity and organization to your orientation process. Remember this is a tool and the content may be rearranged, reprioritized, lengthened or shortened to fit your needs and level of experience. The Orientation Checklist is used to document your orientation by indicating date accomplished.

EMPLOYEE: _____ JOB TITLE: _____

START DATE: _____ COMPLETION DATE: _____

THEORETICAL OBJECTIVES:

- Human resources, personnel records and policies and procedures management
- The organization's mission, vision and goals including an overview of the home care system
- Scope and area of services provided
- Introduction to preceptor and personnel
- Resources and utilization
- Clinical record management including documentation requirements
- Safety and security policies and procedures
- Office personnel and processes including policies and procedures
- Computer processes
- Staff meetings, case conferences and other committee meetings, attendance and participation
- Equipment and supplies policies and procedures
- Infection control policies and procedures
- Time management including scheduling
- Regulatory agencies including CMS's Conditions of Participation, [CHAP], federal, state and local agencies governing home health
- Case management and roles in reimbursement
- Development of a Plan of Care
- Performance Improvement activities including identification of problems, issues

TASK	REFERENCE MATERIAL	LEARNING ACTIVITY	DATE ACCOMPLISHED
Completion of Human Resources Orientation	Provided	Attend XYZ HHA Orientation	
Introduction to preceptor		Meet with preceptor	
Introduction to office personnel and clinical staff		Introduction by preceptor/other	

TASK	REFERENCE MATERIAL	LEARNING ACTIVITY	DATE ACCOMPLISHED
Tour of office and building		Tour with preceptor or other staff member	
Begin Personnel File with [XYZ] Manager –Sign Job Description, Confidentiality Statement, contract negotiation		Meet with Manager/other and office personnel	
Begin Skills Proficiency Checklist	Skills Proficiency Checklist	Meet with preceptor	
Overview of the orientation Process	Orientation Checklist	Review with preceptor after reading	
Overview of [XYZ] and home health system Organization's mission, vision and goals Scope and area of services Care or service responsibilities Coordination of care Appropriate referrals Other patient care responsibilities Complaints/Grievances CMS Conditions of participation State licensure [CHAP]	Orientation Sections Manual	Review with preceptor after reading	
Personnel and office activities Phone operation, etiquette Voice mail Daily Activity Record Reimbursement Mileage Computer system Mail Fax machine Supplies and ordering Filing processes Admission process	Orientation Sections Manual	Review with preceptor after accomplishment	

TASK	REFERENCE MATERIAL	LEARNING ACTIVITY	DATE ACCOMPLISHED
Personnel and office activities cont'd			
<ul style="list-style-type: none"> Clinical Records management Copier Safety and security 			
Issuance of position specific Equipment/supplies		By preceptor/other	
Computer process		Work with preceptor	
Clinical Records Management <ul style="list-style-type: none"> Admission Process Documentation, forms, requirements Advance Directives Confidentiality 	Orientation Sections Manual	Read and review with Preceptor	
Scheduling of patients <ul style="list-style-type: none"> Timeliness 	Orientation Sections Manual	Review with preceptor	
Safety issues: <ul style="list-style-type: none"> Emergency preparedness Office safety, fire prevention Security Unsafe situations action Home safety including bathroom, fire, environmental and electrical Storing, handling, accessing supplies, medical gases and drugs Equipment management Inclement weather Vehicle accidents Personal safety Maps and local areas 	Orientation Sections Manual	Review with preceptor after reading	

TASK	REFERENCE MATERIAL	LEARNING ACTIVITY	DATE ACCOMPLISHED
Infection Control Equipment management Identifying, handling and disposing of hazardous or infectious materials and wastes Personal hygiene Aseptic procedures Communicable infections	Orientation Sections Manual	Review with preceptor after reading	
Community resources Abuse and Neglect screenings	Orientation Sections Manual	Review with preceptor after reading	