

THE ESSENTIAL HANDBOOK

for New Employees

DIANA SWIHART, PHD, DMIN, MSN, APN CS, RN-BC, FAAN
SOLIMAR FIGUEROA, PHD, MSN, MHA, BSN, RN, P-PCA



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ISBN: 978-1-68308-201-9

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Dr. Diana Swihart is a consulting partner with the Forum for Shared Governance and the CEO and Managing Partner for the American Academy for Preceptor Advancement and enjoys many roles in her professional career, practicing in widely diverse clinical and nonclinical settings. An author, speaker, researcher, educator, and consultant, she has published and spoken nationally and internationally on a number of topics related to servant leadership, preceptors, shared governance, new-employee onboarding and orientation, competency assessment, professional development, Magnet Recognition Program®, research, and evidence-based practice.

Dr. Swihart has served on the editorial advisory board for the Journal of Nursing Regulation, as an ANCC Magnet Recognition Program® appraiser, as a board member for the ANCC Accreditation Commission, as the treasurer for the Association for Nursing Professional Development (prior to its name change), and as adjunct faculty at South University and Trinity Theological Seminary and College of the Bible distance learning programs. In 2015, Dr. Swihart was inducted as a fellow into the American Academy of Nursing for her work in developing preceptor specialty practice and certification.

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Dr. Solimar Figueroa brings more than 30 years of experience in her professional nursing practice. Now a Clinical Educator II in her current hospital-based position, her practice emanated from the Philippines, Kingdom of Saudi Arabia, Michigan, and Florida. Dr. Figueroa's experience includes operating room nurse, operating room in-charge nurse, director of nursing, chief nursing officer, assistant director of nursing, clinical educator, director of clinical services, and certified preceptor specialist.

Dr. Figueroa serves as an appraiser with the American Nurses Credentialing Center (ANCC) for continuing education and the Practice Transition Accreditation Program and manages the Clinical Collaborations for the American Academy for Preceptor Advancement (AAPA). She has master's degrees in nursing and healthcare administration, and her PhD is in nursing. She is an author, speaker, researcher, educator, and consultant. Her primary interests are preceptorship and leadership in healthcare and education.

Acknowledgments

Every work, regardless of scope and size, is completed only with the help and inspiration of others. My heart and sincere thanks go to my beloved husband, Dr. Stan, for your support, encouragement, and unwavering belief in me.

To my amazingly gifted partner and co-author, Dr. Solimar Figueroa, thank you! You have been a steadfast friend and colleague for many years, traveling with me through valleys and across mountaintops! So much I have accomplished these past few years would not have been possible without you (and your beloved Omie)!

I would also like to acknowledge those many nurses and other healthcare providers, patients and community partners, speakers and teachers, and colleagues and friends who have contributed their ideas and thoughts through countless classes, seminars, lectures, and discussions over the years. I write from their influence and want to recognize their contributions as well. Though their names are too numerous to list, many others can be found in this work and in the extensive bibliography. To each and every one of you, thank you.

—Diana Swihart, PhD, DMin, MSN, APN CS, RN-BC, FAAN

To my sweetheart, my agape, my dearly loved Omie: Your unconditional love, support, and faith in my abilities are the reasons behind my successes, in addition to God's blessings. I thank you for everything. To my children, Jaeger and Nathan, you inspire me to be the mom I needed to be.

I also wish to acknowledge Dr. Swihart, who believed in me from the very beginning of our relationship and guided me through my professional journey. To all of my colleagues and friends who dreamt with me, I thank you for your support and encouragement. Thank you all for being a part of my success. To my mom Helen, who made night into day so I could go to the best school, I am proud to be your daughter. I am who I am today because of the sacrifices you made. Mahal kita Nanay Helen. To the Espino family, Kuya Fred and Ate Fely, thank you so much for loving me unconditionally. Your support is truly a blessing.

—Solimar Figueroa, PhD, MSN, MHA, BSN, RN, P-PCA

Preface

Congratulations! You got the job! This handbook is a compilation of tools to help you participate in your new-employee program, with convenient resource pages to keep important information to reference after you transition to practice and service. It is designed to help you engage in an interactive and participative program that is consistent with adult learning principles. It is about doing, not just being exposed to lots of facts and figures and faces all flowing through your day. There are guides for delegating authority, what you might expect during the competency validation process, how to give and receive constructive and positive feedback, and how to evaluate your new-employee program.

You are a critical and valuable resource for our organization. These tools can support you as you partner with your leadership, educators, interprofessional partners and colleagues, and interdisciplinary team members to ensure that you achieve renewed commitment and enthusiasm for your decision to join our organization and teams.

The information presented in this handbook reflects the research and opinions of the authors, contributors, and advisors. Because of ongoing research, advances in technology, and improvements in recruiting and onboarding processes, this information, the tools, and their applications are ever-changing.

It is our sincere hope you will add this handbook with its information, exercises, and sample forms to your new-employee resource toolkit. Consider, too, how you might contribute to this important process with lessons you have learned, changes you would like to see, and ideas for improving the new-employee program for those who come after you.

Welcome!

Diana Swihart and Solimar Figueroa, 2016

Introduction

Being the “new person” has never been easy. It is even more difficult and confusing to be a new employee now, as the world of healthcare becomes increasingly multifaceted and complicated. Healthcare providers assume many more roles and responsibilities much more quickly, often with far less time to learn about the organization, service or discipline, and team they have joined before expectations are thrust upon them. The changes and stress can be overwhelming as they rapidly move from honeymooning (*I got the job I wanted!*) through shock (*What have I done?!*) to reality (*It is what it is OR It will be what I make of it; my choice*). Perhaps you have been through this before; perhaps this is your first time as the “new person” and you are wondering what comes next. Let’s start with some definitions.

The New-Employee Progress Overview

New-employee name:	
Title:	
Position:	
Current skills acquisition status:	
<input type="checkbox"/> Student <input type="checkbox"/> New graduate <input type="checkbox"/> Newly qualified <input type="checkbox"/> Intern <input type="checkbox"/> Resident	
Onboarding status:	
<input type="checkbox"/> Organization orientation	Date initiated: _____
<input type="checkbox"/> Service-specific orientation	Date initiated: _____
<input type="checkbox"/> Preceptorship	Date initiated: _____
<input type="checkbox"/> Competencies validation	Date initiated: _____
<input type="checkbox"/> Internship/residency	Date initiated: _____
<input type="checkbox"/> Transition to Practice/Service	Date completed: _____
Primary preceptor:	
Title:	
Position:	Date:
Educator:	Date:
Manager/supervisor:	Date:

Comments:

CHAPTER 1

Onboarding: Definitions and Wayfinding

Onboarding and *orientation* are often used as interchangeably as *coaching*, *preceptoring*, and *mentoring*. Yet there is a significant difference in definition and application. *Onboarding* is a process for integrating *new hires* (or *new employees*) into an organization, whereas *orientation* is comprised of the events or activities associated with introducing them to their new positions, duties, and responsibilities. Both the process and the events help you become part of your new organization's culture and service teams. *Orientations* are also important for employees changing roles or specialty practices, assuming new responsibilities and accountabilities, or transitioning from one service or unit to another.

Onboarding is a period of new vulnerabilities as new relationships are established with new roles, responsibilities, and accountabilities in new teams. It helps you gain the confidence and skills needed to acclimate positively and competently (see **Table 1.1**).

Table 1.1

Wayfinding Activities in Your Orientation and Preceptorship

Hospital (general or organization) orientation

Complete general hospital or organization orientation checklist:

- Welcome from hospital leadership
- Introduction to services and key organizationwide policies and procedures (e.g., benefits, ethics, organizational culture, climate, and context, etc.)
- Your information added into organization database
- Your files are set up and maintained
- Other service-specific poststart tasks: parking, security (e.g., ID badges, computer access), tour facility, etc.

Service-specific orientation

Complete service-specific orientation for transition into practice and work teams:

- Receive copy of job description or functional statement, initial performance expectations, and competencies
- Identify and perform on-the-job and just-in-time training activities for orientation and competency assessment
- Visit work unit or area and meet team members
- Process remainder of your onboarding paperwork
- Review and validate your initial competencies

Preceptorship: Begin in general (or organization) orientation and continue through service-specific orientation activities

Receive information and schedule for preceptorship; preceptored activities to be completed with service-specific orientation and residency or internship (if applicable)

- Begin your preceptorship: meet your primary preceptor
- Review your job description, role, and expectations during onboarding process and orientation activities; initiate your professional portfolio
- Complete a needs assessment and learning activities; verify competencies
- Attend frequent meetings for feedback, problem solving, and encouragement
- Maintain copies of documented performance, competencies met, learning and team-building activities, and feedback and evaluations for your employee folder
- Contribute to progress reports to hiring manager or supervisor
- Continue the preceptorship throughout the service orientation and any additional residency programs or internships

The *job description*, sometimes called a *functional statement*, usually has four basic components and is reviewed during orientation:

1. A description of knowledge, skills, and attitudes (KSA) needed for your positions, i.e., education level, experience, and physical demands related to job performance
2. A list of typical duties to be performed in the role
3. Identification of the professional practice knowledge the organization expects you to abide by during your employment
4. A description of the knowledge-based skills needed to achieve organizational outcomes

The job description reflects the work to be done on a routine basis and what is needed to carry out the duties of the position. Unique or regulatory requirements may be included, as well. When a preceptorship is part of the new-employee program, the job description speaks to some of the competencies and learning activities developed for that part of the onboarding process.

**E
X
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E****Review your job description and functional statement.**

1. What are the KSAs needed for your position?
2. What duties listed require more information or skill?
3. What professional practice knowledge are you expected to abide by in your new organization?
4. What qualifications do you want to expand or build during onboarding?

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The onboarding process can make or break a new employee. ***The Essential Handbook for New Employees*** is a compilation of tools to help you participate in your new-employee program. These tools can support you as you partner with leadership, educators, interprofessional colleagues, and interdisciplinary team members to ensure you achieve renewed commitment and enthusiasm for the organization and team you've joined.

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ISBN-13: 978-1-68308-201-9
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