TRAINING DOCUMENT

There are several reasons to create a TRAINING DOCUMENT. You may want to sign up staff for a MED U Mastery program, or you want to take them through a competency evaluation. Most commonly, you want to get a new employee oriented. One of the keys to getting a new employee to be productive and secure in their job is to offer a well organized orientation - especially in the first 30 days and then completing an introductory evaluative period (usually the first 90 days) where you and your company focus on getting that new employee familiar with the job, the company and their daily tasks.

To create a Training Document, first go to the Individual Employee's page. As a Super Manager, click on VIEW EMPLOYEES and the list of all employees will come up.

VIEW...

- Job Descriptions
- Employees
- Managers
- Introductory Evaluations
- Training Documents
- Coaching Documents
- Applause Documents
- Disciplinary Actions
- Periodic Evaluations
- Annual Reviews

MED Supply Company

Click on an employee to open for viewing and editing.

Del?	Employee Name	Employee ID	Job Description	Hire/Eval Date	Status
	Billy Johnson	8998	Billing - Collections and Denials	11/09/2005	Active
	Dolly Madison	4321	Respiratory Therapist - Vent	10/7/2005	Active
	Doug Doug	6489	rehab tech 1	11/17/2006	Active
	Gary Weems	1212	AA HR	10/02/2006	Active
	Glenn Close	6666	CSR 1	10/7/2005	Active
	Han Dee Mann	9834	Adminstrative Assistant - Service	10/07/2005	Active
	James Doe	9040	customer service rep	10/10/2006	Active
	Jane RT	1569	Respiratory Therapist - Vent	10/05/2006	Active
	Jason Wainright	125	CSR 1	1/30/2006	Active
	JAYCEE MOORE	4506	RESPIRATORY SERVICE TECH 1	03/17/2006	Active
	Jim Smith	1111		10/07/2005	Active

As a Manager, simply enter your Manager's Page for a listing of all of your employees to whom you have access.

Welcome Pam Jones! What would you like to do today?

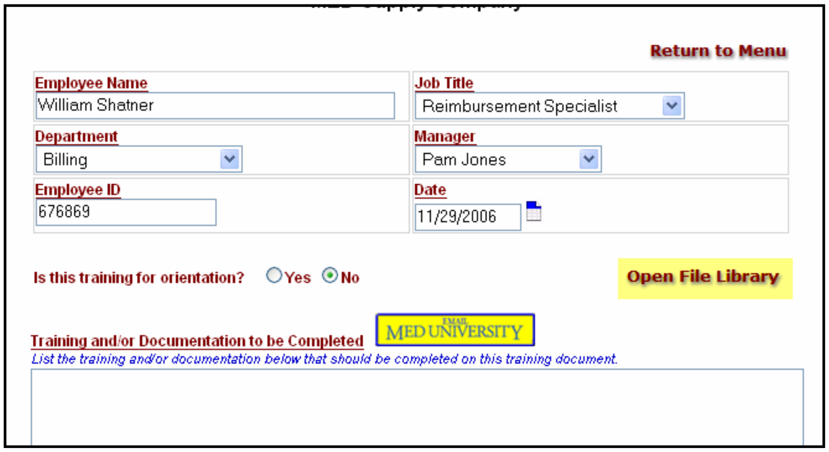
Employee Name	Employee ID	Job Description	Hire Date	Status
Mary Jones	9236495151	CSR/Reimbursement Specialist	11/30/2005	Active
Pam Tom	9872	Billing - Collections and Denials	11/20/2006	Active
Tony Soprano	4444	Billing - Collections and Denials	10/7/2005	Active
Uma Thurman	976431	Reimbursement Specialist	11/14/2006	Active
William Shatner	676869	Reimbursement Specialist	11/14/2006	Active

Click on the name of the employee you want to create a document for and their page comes up. The concept for creating a TRAINING DOCUMENT is simple, open a document, copy and paste, email. Here's how it works. Click on create TRAINING DOCUMENT.

CREATE...

- Training Document
- Coaching Document
- Applause Document
- Disciplinary Action
- Periodic Evaluation
- Annual Review Self-Evaluation
- Annual Review

The document below will come up. Click on OPEN FILE LIBRARY. (To review more on creating and loading files into the FILE LIBRARY, review that chapter). This FILE LIBRARY should have your company's collection of training in files that can be opened by your computer.


Return to Menu

Employee Name: William Shatner	Job Title: Reimbursement Specialist
Department: Billing	Manager: Pam Jones
Employee ID: 676869	Date: 11/29/2006

Is this training for orientation? Yes No

Open File Library

Training and/or Documentation to be Completed MED UNIVERSITY

List the training and/or documentation below that should be completed on this training document.

The list of available document comes up as you see below. Since William is a new Reimbursement Specialist, let's open the document. Double click on the link and the document will open up in a new window.

The File Library contains your company's predefined documents. To open a document in a new browser window, just click on one of the file links below. Depending on your security settings, you may need to allow your browser to open the file (e.g., Word, Excel, etc.). Once the file is open, you can then select text from the document and either copy/paste the text or drag the selected text to the field on the form.

Attachments:

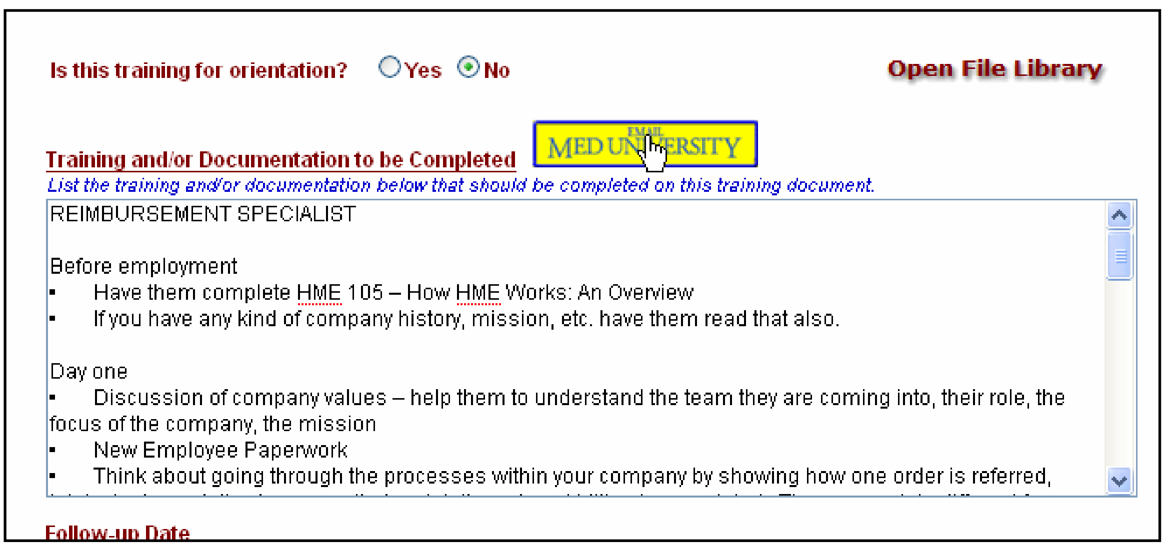
File Name:	CSR ORIENTATION.doc	36 (Kbytes)	
File Name:	DELIVERY TECHNICIAN 02 ORIENTATION.doc	37 (Kbytes)	
File Name:	MANAGEMENT ORIENTATION.doc	36 (Kbytes)	
File Name:	OFFICE STAFF ORIENTATION.doc	36 (Kbytes)	
File Name:	REIMBURSEMENT SPECIALIST ORIENTATION.doc	37 (Kbytes)	
File Name:	REPAIR TECHNICIAN ORIENTATION.doc	36 (Kbytes)	
File Name:	SALES ORIENTATION.doc	37 (Kbytes)	
File Name:	WAREHOUSE STAFF ORIENTATION.doc	36 (Kbytes)	

Close Window

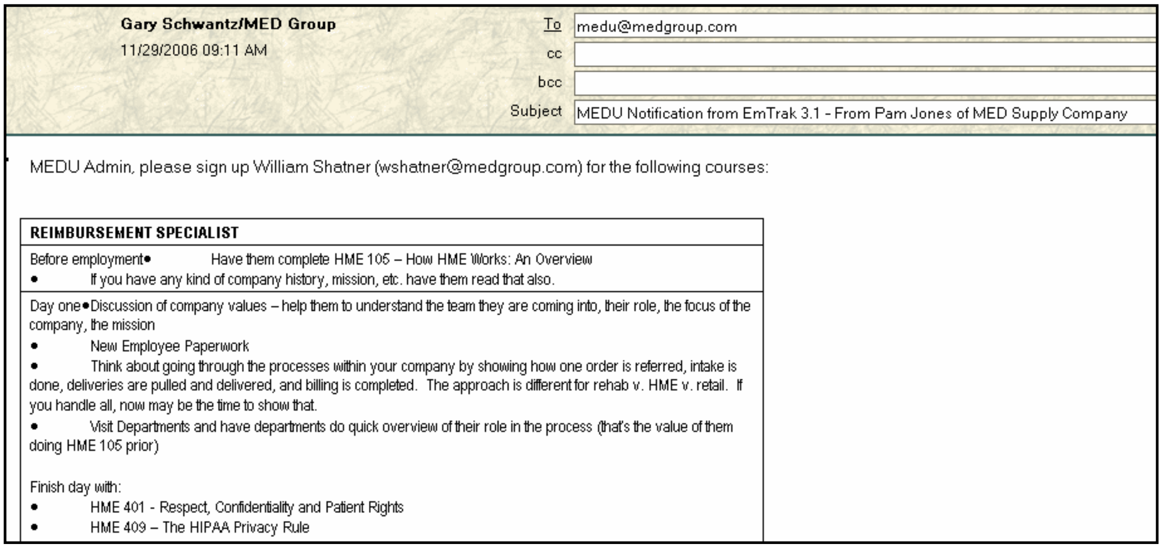
Below is how this particular document looks when it is opened. Notice that this one was created as a table, elements are individual cells (I note this because when we copy and paste this into the TRAINING DOCUMENT, we will have to do some adjustments – the open fields can accept the text, but they can't accept the lines or cells)

REIMBURSEMENT SPECIALIST	
Before employment	• Have them complete HME 105 – How HME Works: An Overview • If you have any kind of company history, mission, etc. have them read that also.
Day one	• Discussion of company values – help them to understand the team they are coming into, their role, the focus of the company, the mission • New Employee Paperwork • Think about going through the processes within your company by showing how one order is referred, intake is done, deliveries are pulled and delivered, and billing is completed. The approach is different for rehab v. HME v. retail. If you handle all, now may be the time to show that. • Visit Departments and have departments do quick overview of their role in the process (that's the value of them doing HME 105 prior) Finish day with: • HME 401 - Respect, Confidentiality and Patient Rights • HME 409 – The HIPAA Privacy Rule Follow up with discussion after they have completed courses on the importance of confidentiality.
Day two	Have them complete the appropriate equipment courses • HME 310 – Equipment-General DME-HME • HME 312 – Respiratory Equipment • View Equipment, explain the types of patients and their needs • Shadow someone with their job title.
Day three	• REM 101 – Reimbursement: Orders & The Intake Process • REM 102 – Reimbursement and Documentation

Now, select the entire document, copy it and paste it into the field that reads Training and/or Documentation to be Completed. Now, if there are any MED U courses included in this training, simply click the Email MED UNIVERSITY yellow button.



By clicking on Email MED University, your email system on your computer will automatically come up with the email address for MED U (medu@medgroup.com) and with the name of the student and manager. **All you have to do is copy and paste the same thing in the email that you did into the training document.** From there, hit the send button. At MED U we will sign the employee up, notify them and you by email, and you are ready to go.

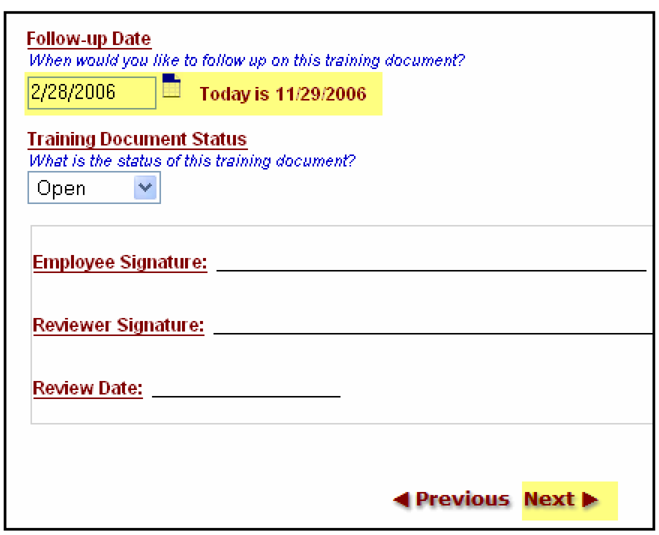

Gary Schwantz/MED Group
11/29/2006 09:11 AM
To medu@medgroup.com
cc
bcc
Subject MEDU Notification from EmTrak 3.1 - From Pam Jones of MED Supply Company

MEDU Admin, please sign up William Shatner (wshatner@medgroup.com) for the following courses:

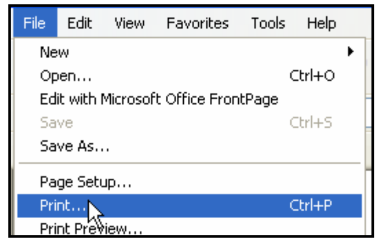
REIMBURSEMENT SPECIALIST
Before employment• Have them complete HME 105 – How HME Works: An Overview • If you have any kind of company history, mission, etc. have them read that also.
Day one•Discussion of company values – help them to understand the team they are coming into, their role, the focus of the company, the mission • New Employee Paperwork • Think about going through the processes within your company by showing how one order is referred, intake is done, deliveries are pulled and delivered, and billing is completed. The approach is different for rehab v. HME v. retail. If you handle all, now may be the time to show that. • Visit Departments and have departments do quick overview of their role in the process (that's the value of them doing HME 105 prior) Finish day with: • HME 401 - Respect, Confidentiality and Patient Rights • HME 409 – The HIPAA Privacy Rule

Finishing up the Training Document

Your final step is to put in the **Follow-up Date**. In this case, since this is an orientation, we may want to set the follow-up for 90 days from now, our introductory period. The option is up to you. If you have them on a 30 day training program, then you would put a date 30 days from now. Whatever you put in as the follow-up date, 7 days before that you will get a reminder that you created a training program for this employee and you need to follow up. Leave the Training Document Status as OPEN. Click the NEXT button.



Now you've got a training document you can print out, put in your employee's hands, use as a checklist I f you want to. To print from your browser, either click on FILE>PRINT from the menu on the upper left hand side of the page or click on the printer icon.



Note the place for both you and your employee to sign. These signatures simply confirm your and their commitment to the training. Don't skip that step.

Edit Training Document **Return to Menu**

Employee Name William Shatner	**Job Title** Reimbursement Specialist
Department Billing	**Manager** Pam Jones
Employee ID 676869	**Date** 11/29/2006

Is this training for orientation? NO

Training and/or Documentation to be Completed EMAIL MED UNIVERSITY

List the training and/or documentation below that should be completed on this training document.

REIMBURSEMENT SPECIALIST

Before employment
▪ Have them complete HME 105 – How HME Works: An Overview
▪ If you have any kind of company history, mission, etc. have them read that also.

Day one
▪ Discussion of company values – help them to understand the team they are coming into, their role, the focus of the company, the mission
▪ New Employee Paperwork
▪ Think about going through the processes within your company by showing how one order is referred, intake is done, deliveries are pulled and delivered, and billing is completed. The approach is different for rehab v.

Day five
▪ REM 104 – Reimbursement: Accounts Receivable Management and Collections (if appropriate)
Process flow review – practice on some mock billings, submissions.
▪ CS 102 – Telephone Courtesy and Customer Service
▪ PPD 102 – Dealing with Conflict and Difficult People

Follow-up Date
When would you like to follow up on this training document?
2/28/2006

Training Document Status
What is the status of this training document?
Open

Employee Signature: ______________________________

Reviewer Signature: ______________________________

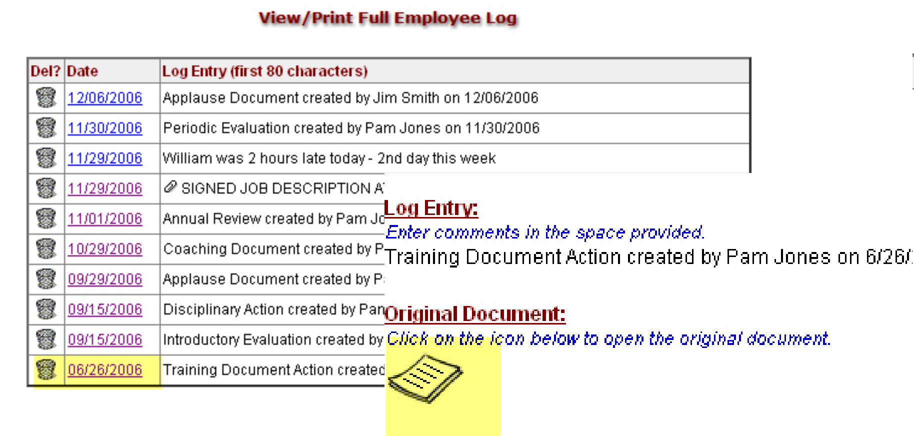
Review Date: _____________

Return to Menu

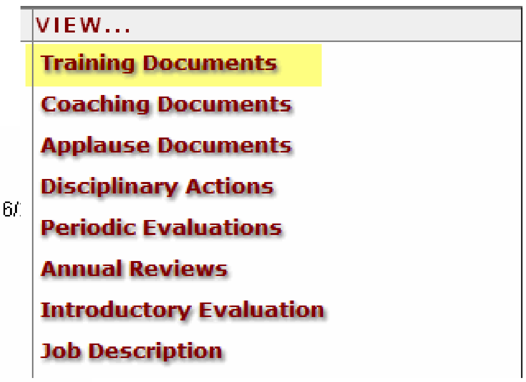
Final Follow-up on the Training Document

You marked the Training Document OPEN because of the goals you set for the next few weeks/months that you want to follow-up on. Based on the follow-up date, you will get a reminder 7 days before that date that you created a Training Document to be reviewed.

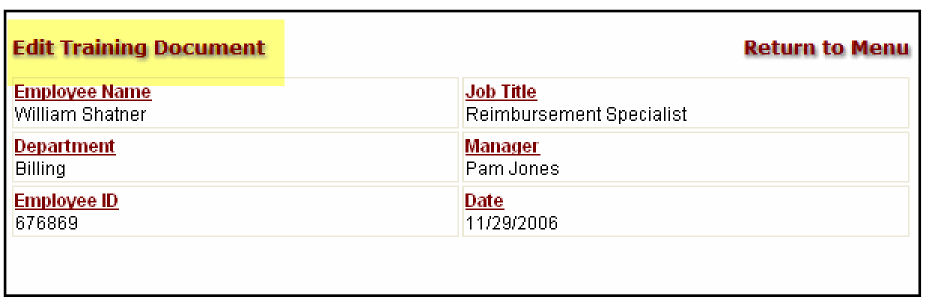
To get to the Training Document, click on this employee's name on your Manager's Page, then you can either select the document in the Employee Log or click on VIEW > TRAINING DOCUMENTS.


View/Print Full Employee Log

Del?	Date	Log Entry (first 80 characters)
	12/06/2006	Applause Document created by Jim Smith on 12/06/2006
	11/30/2006	Periodic Evaluation created by Pam Jones on 11/30/2006
	11/29/2006	William was 2 hours late today - 2nd day this week
	11/29/2006	SIGNED JOB DESCRIPTION A
	11/01/2006	Annual Review created by Pam Jo
	10/29/2006	Coaching Document created by P
	09/29/2006	Applause Document created by P
	09/15/2006	Disciplinary Action created by Pan
	09/15/2006	Introductory Evaluation created by
	06/26/2006	Training Document Action created

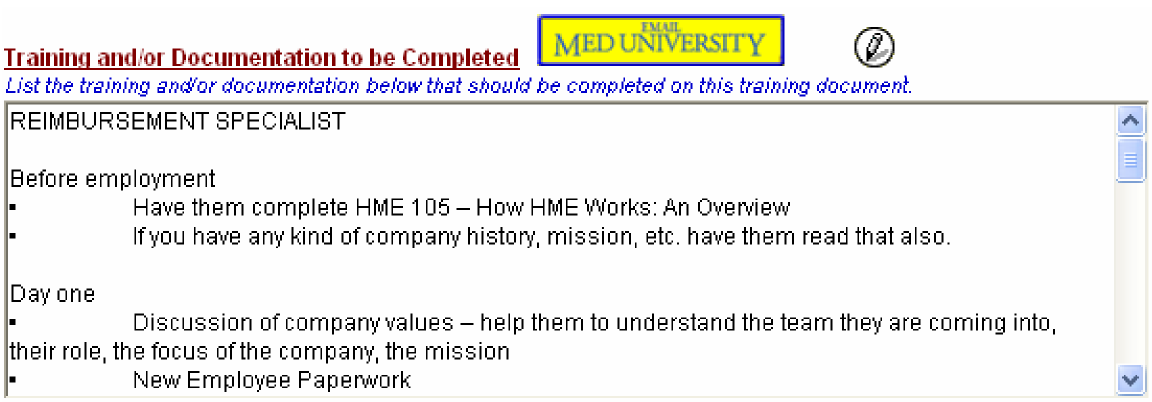


The document is up. Now, click on Edit Training Document on the upper left-hand side.


Edit Training Document | Return to Menu

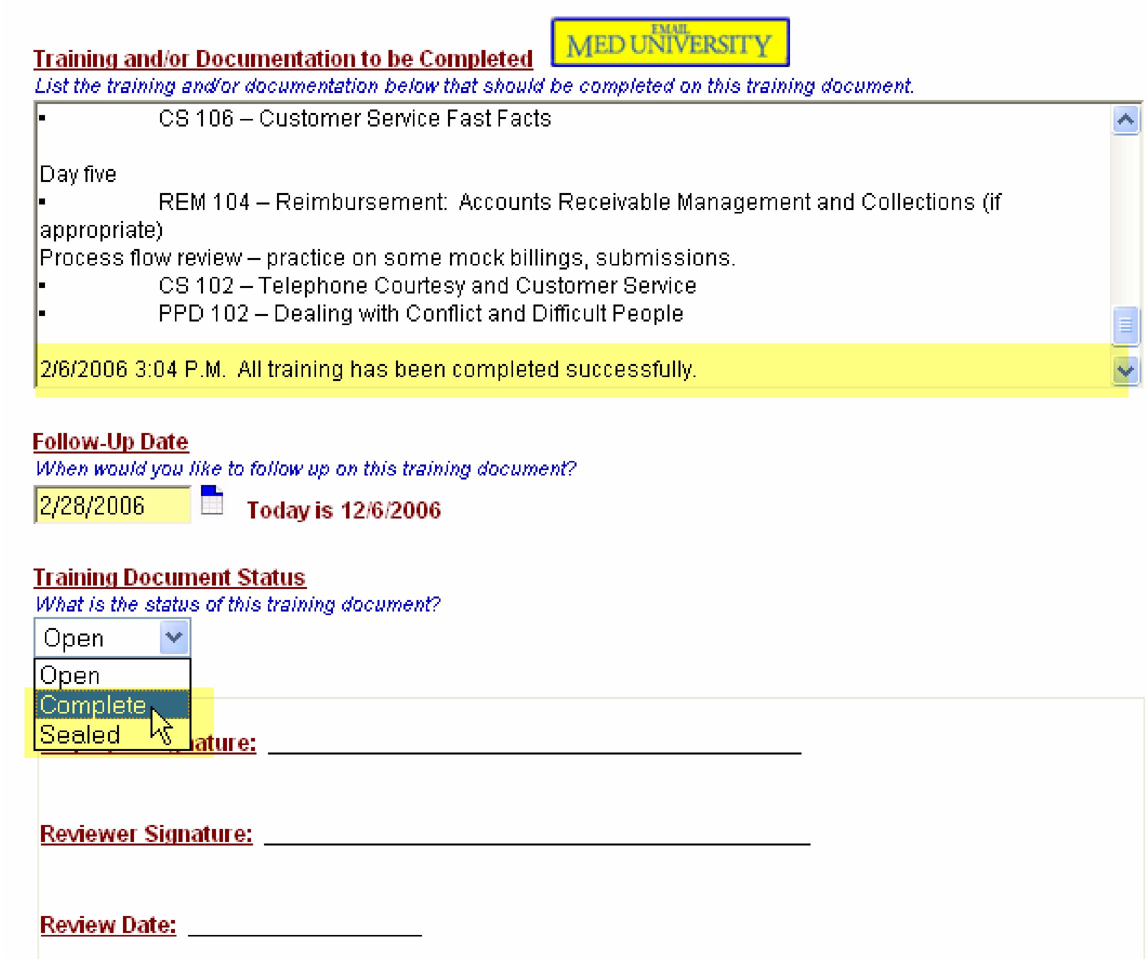
Employee Name William Shatner	Job Title Reimbursement Specialist
Department Billing	Manager Pam Jones
Employee ID 676869	Date 11/29/2006

Review the training to see if it is complete. Then click on the pencil icon to add some comments. A date will automatically be inserted at the bottom of the field.



Put in your comments on the training and its completion. It this is done, then choose either COMPLETE or SEALED and you are done.

OPEN means the document hasn't been touched or there is still significant work to do. COMPLETE means that you are done, but that the document can still be edited. Perhaps there is something in the document that needs additional follow-up. Either way, you will get reminders based on the follow-up date. Once you know a document is complete, then you may choose to select SEALED. Once the document is SEALED, it cannot be edited. This offers security to your staff member that final documents are the <u>final document.</u>



What if the training is not complete?

If the training is not complete, then in your comments, copy and paste from up above in the field or type in what needs to be complete. Reset the follow-up date for a future reminder, leave the document as OPEN, then when the email reminder comes in the future, follow-up once again.