Clinical Onboarding – Phase I

Human Resources, Orientation, Information Technology, Safety, Emergency and Documentation

Welcome to Alliance HealthCare Services! We are very excited to have you join our team and hope you will find your new position to be rewarding. You will be working alongside your Clinical Trainer and other Team Members to help lead the way as you become oriented with Alliance. For the purpose of this onboarding, specific Policies & Procedures will be referenced throughout this manual. This in no way diminishes the importance of ALL Alliance Policies & Procedures.

Alliance Team Member Web Site

The Alliance Team Member Website (TMWS) provides a plentiful amount of knowledge. From our leadership structure, history and philosophy, to accessing Workday for your time tracking and payslips – this will be the go to site for anything Alliance.

- ☐ Meet/Call with your supervisor or their designee.
- ☐ Review the sections of the TMWS and get an overview of the information each provides: Main Menu, Shortcuts, Departments, and External Sites.
- ☐ Demonstrate to your supervisor or their designee: how to check email, access ACT modules from the ATM, access Workday (for your data, org charts, contact info for colleagues, etc.), and submit a service desk ticket.
- ☐ Demonstrate how to find a policy and an SDS sheet.
- ☐ Discuss the Bravo Program and demonstrate how to send a Bravo card to a Team Member.
- ☐ Review the following on the TMWS:
  - Mission, Vision and Values of the organization
  - The leadership and structure of Alliance
  - Current Newsletters
  - Quality News containing recent policy updates located on the left-hand side panel of the website (when viewing Icons)

- Training & Performance System (ATM/ACT)
- Expense Wire System

☐ Please become familiar with all of the Policy and Procedure Manuals. Alliance Healthcare Services (AHCS) policies are subject to change at Alliance's sole discretion at any time, with or without advanced notice, due to changing business needs and/or regulatory requirements. Review all material outlined in the Alliance Radiology Operations Policy & Procedure Manual on the TMWS.

Position Overview:

☐ Meet (in person/via phone) with your Clinical Trainer and discuss your Onboarding and Training program.

☐ Ensure you can locate and review the following on the Team Member Web Site (TMWS):
  - o Team Member Handbook
  - o Workday Time Tracking (Reviewing your punches in & out)
  - o Safety and Security (i.e. spills procedures)
  - o Policies & Procedures

☐ Discuss methods relating to requesting time off (vacation), calling out sick protocol and schedule allocation.

☐ Ensure you've completed all Day 1 ACT modules and complete your remaining assigned ACT modules online within 30 days.

☐ Ensure your Team Member badge works properly. If your badge does not work, let your Manager or HR Express (hrexpress@alliancehealthcareservices-us.com) know as soon as possible.

Activities, Reading, Meeting, and Interviews Week One

Human Resources

☐ Understand the services offered by HR Express (HRExpress@alliancehealthcareservices-us.com and 844-722-4739).

☐ Review the Team Member Website (TMWS), key areas and ensure a successful login.

☐ Review the *"Team Member Handbook" on the TMWS.*

☐ Access the Alliance Training Management (ATM) system and ensure completion of all your required trainings. Also, discuss any optional modules with your Manager.

☐ Access Workday and update your work phone number so that others in the organization will know how to reach you.

☐ Ensure the following items have been submitted: I-9, Direct Deposit, W-4.

☐ Connect with your Manager on your designated HR Business Partner and how you can utilize that resource.

- ☐ Ensure understanding of the Credentialing policies and the importance of timely renewals.

Position Overview

- ☐ Meet/Call with your Supervisor or their designee.
- ☐ Review and discuss the job description, job performance expectations, primary responsibilities of the position and On-Boarding and Training Program.
- ☐ Review the Team Member Handbook: General Company, Employee Policies, Payroll and Time Keeping, Safety and Security, Benefits, etc. Review when the selected topic will be covered in more detail.
- ☐ Discuss the Team Member Performance Review process and review the competency check list you will be responsible to complete at the end of your On-Boarding and Training Program.
- ☐ Discuss the essential team member characteristics: team player, independent, organized, resourceful, will to teach others, ability to multitask, good interpersonal communication skills, flexibility, diplomacy, compassion, able to anticipate situations, strong technical skills and ability to remain calm in emergency conditions. Review why each is important and a situation that each characteristic would be utilized with a patient and a customer.
- ☐ Review and discuss Section 9000 of the Operations Policy and Procedure Manual-Performance of Employees (TMWS). This includes: health screening, illness or injury, TB treatment and testing, eating/drinking/vaping/use of tobacco, management availability, work restrictions and communicable diseases and professional courtesy.
- ☐ Review your proposed work schedule (start, stop and flex), Team Members you will be working with at each site, how you will interact with them, and ensure you have contact information for each.
- ☐ Review the most effective directions to each site, where the unit is located, how to enter/access the building/unit, how to access keys, security protocols and other pertinent details in getting to and accessing each location you are assigned to.
- ☐ Review exchanging shifts, rest and meal periods, down time procedures & pay, overtime start/end times.
- ☐ Review the mandatory list of ACT modules for your position and/or additional modules available to you if necessary. The modules are: (check off when completed)
  - ☐ Safe Lifting and Transport
  - ☐ Patient Assessment
  - ☐ Population Specific Healthcare
  - ☐ Victims of Abuse
  - ☐ Fire Safety
  - ☐ Active Shooter

- ☐ Safety and Security
- ☐ Disaster Preparedness
- ☐ Bloodborne Pathogens
- ☐ Falls Prevention
- ☐ Infection Control
- ☐ Code Blue
- ☐ Chemical Hazards/SDS
- ☐ Radiation Safety (CT, PET/NM)
- ☐ HIPAA
- ☐ Impaired Physician Awareness
- ☐ Cultural Diversity
- ☐ Patient Communication
- ☐ Magnet Safety (MRI)
- ☐ US Probe Disinfection (US)
- ☐ Use of Accu-chek Performa (as applicable)
- ☐ Basic Glucometer (PET)
- ☐ HAZ-MAT DOT Training (PET/NM)
- ☐ GFR Calculation (MRI as applicable)
- ☐ Preliminary Breast Stereotactic US (US as applicable)
- ☐ CT Injector System (CT) (Optional)
- ☐ iSTAT CHEM 8 (optional for CT and Radiology)
- ☐ MRI Injector (MRI) (Optional)
- ☐ iSTAT CREA (optional for MRI)
- ☐ Venipuncture (Optional)
- ☐ SSHVA Training (required prior to completing site hazard assessments)

- ☐ Receive badge, keys, cell and lab coat (if applicable)
- ☐ Know where to access Team Member (TM) directory in Workday
- ☐ Review Alliance Technologists Code of Ethics: Operations P & P Attachment A012 (if applicable)
- ☐ Ensure you have completed all required ACT modules based on your job title and modality

Daily Site Responsibilities:

This section will cover day-to-day responsibilities on your unit or site. Note: This section must be reviewed for each site and unit you provide support to.

- ☐ The unit should be clean and organized prior to daily scanning and at the end of each shift.
- ☐ Review the Reference Manual Binder.

- ☐ Know the importance of the appearance of a clean orderly unit and the impressions made on patients and the customer/site.
- ☐ Review the ASQ to check and confirm that key elements of the unit are in working order.

Beginning service:

- ☐ Ensure your lab jacket/clothing is clean, neat and your name badge is facing out
- ☐ Ensure unit is clean and presentable
- ☐ Warm up unit
- ☐ Quality Control checks
- ☐ Complete the Alliance Safety and Quality (ASQ) check list elements surrounding:
  - ✓ Equipment and Quality Check
  - ✓ Safety Check
  - ✓ Equipment, Supply and Injectable Check
  - ✓ Staff and Patient Schedule Check
  - ✓ Customer Check

    NOTE: If the Team Member will be completing any ASQ / ESR work and will not have access to a PLE please open a helpdesk ticket for access to the PUMA ASQ platform and review the instructions for use within the PLE / PUMA User Guide on the Team member Website under the "Quality Corner" icon.

    Further, remember that using PUMA requires a network VPN connection.

  - ***Helpdesk Ticket for PUMA use:*** *"Please add me to the PUMA_Quality_ASQUser AD security group. I will be using PUMA to complete daily/as required ASQ and ESR work in place of using the PLE environment."*

- ☐ Report all equipment issues via Electronic Service Report (ESR)
- ☐ Ensure all required postings are visible
- ☐ Ensure all systems are functioning (PLE, NMIS, etc.)
- ☐ Check E-mail
- ☐ Ensure all necessary medical supplies are on the unit and not expired (Linen, earplugs, contrast, needles, hand cleaner, etc.)
- ☐ Ensure an ample supply of Patient Screening forms and Discharge Instructions are available
- ☐ Prepare and inspect gurney by unlocking wheels and placing in upright position and ensure gurney cleanliness

☐PET or PET/CT Only:

- ☐ Ensure you are wearing your radiation badges
- ☐ PET Technologist Inspect FDG delivery for correct number of doses (PET only)

Through-out shift/day:

- ☐ Follow hand hygiene and wear gloves appropriately
- ☐ Ensure no visitors allowed without proper identification and authorization, including legal agreements

- ☐ Utilize the hand held magnet to ensure no metallic items enter the magnet room (MRI)
- ☐ Follow “patient hand-off” appropriately
- ☐ Clean coils, pads, scanner bore, etc., after each patient
- ☐ Document all patient incidents on Incident Report form (Include screening forms & Waiver of Medical Treatment as applicable when submitting)
- ☐ Handle patient valuables appropriately (leave with family, lockers, lock boxes or sealed envelope with signature –obtain patient signature on screening form Part B following the exam)

Closing Service:

- ☐ Ensure all paperwork is complete and accurate for proper billing.

Submit:

  - ☐ PLE synced and transmitted
  - ☐ Completed Incident Reports
- ☐ Deliver the completed procedure logs to the designated person at the site
- ☐ Remove sharps container from unit if mobile.
- ☐ Ensure unit is ready for transport (if on mobile unit)
  - ☐ Clean and disinfect patient table along with all coils used and stow each for transport
  - ☐ Strap head coil to table
  - ☐ Shut down scanner
  - ☐ Table docked/locked and ready for transport
  - ☐ Sweep/vacuum/mop floor with Swiffer, wipe down all counters and cabinets, wipe down walls and ceilings as necessary and empty trash and replace with new bags
  - ☐ Take laundry inside facility
  - ☐ Chairs secure –strapped to counter
  - ☐ Put all loose paper work away, store all unused supplies in lab and secure and lock cabinets
  - ☐ Place keyboard and mouse behind monitor
  - ☐ Power down PLE computer and laptop if provided
  - ☐ Ensure everything in equipment room is secure for transport
  - ☐ Bring in the gurney/stretcher and lay on side
  - ☐ Bring in slide-outs if snow is expected (location specific)
  - ☐ Disconnect lift cord and place on floor of the control room
  - ☐ Turn out lights
  - ☐ Lock scan room, hot lab and place keys in the exterior lockbox (front of unit)
  - ☐ Call/Text the driver when unit is ready to go

PET or PET/CT Only:

  - ☐ Account for and remove FDG containers from unit (PET/CT)

- ☐ NMIS is complete and transmitted

Account Profiles/Modality Specific Binder:

- ☐ Attend or complete a customer site orientation/check list with your Clinical Trainer.
- ☐ Review the information in the modality specific Account Profile Binder. This is all pertinent information to the site including: Radiologist phone numbers, PACs information, protocols (in some cases), site policies, manager info, communications, and all/any information related with the site.
- ☐ Review key hospital policies, what you should do and what your role is, in the event of: Code RED Emergency Protocols, Code BLUE Emergency Protocols, Disaster/Emergency Management, Sedation and/or Patient Self Medication, Infection Control, Abuse and Neglect, Advanced Directives, Hazardous Material Plan/Policy-needle box disposal, Service Animals, Falls Protocols, Reporting Accident or Injury, etc.
- ☐ Review “Unannounced Survey” for use when a Joint Commission surveyor walks onto a unit or center unannounced. Follow the call tree system on the list.
- ☐ Locate the phone directory, physicians and department numbers.
- ☐ Locate the written Protocols for the site. Annual protocol approval forms located in the Operations P &P Manual on the TMWS. Protocols can be placed in a separate binder if necessary.
- ☐ Complete copy of SSHVA -Note the risks specific to site/location.
- ☐ Unit Readiness Checklist for use in preparation of a Joint Commission survey.
- ☐ #A029 Protocol Change by Radiologist form-located in the Operations P&P Manual on the TMWS.
- ☐ Territory call tree.
- ☐ Specific memorandums
- ☐ Other: emergency report systems, Digital Radiology and Communications in Medicine (DICOM) connections, how to submit images and paperwork, patient orders, medical record numbers, and location of supplies.

  MRI Only: MR Sentinel Event Alert Response -found on the TMWS under the Quality Corner in the Quality Resources under MRI safety.

  PET or PET/CT Only: #A008 Site Specific Glucose Levels-located in the Operations P&P Manual on the TMWS

Alliance History, Philosophy, Structure and Leadership

- ☐ Meet with your supervisor or their designee
- ☐ Review the Alliance Radiology history, the services, types of customers and Mission, Vision and Values of the organization on the Team Member website.
- ☐ Review the leadership and structure of Alliance (Territory, Supervisor, Manager, ADO, DO, key team members)

- ☐ Discuss the role of marketing at your sites, the Account Executive (AE) or Regional Account Executive (RAE) who are involved in increasing scan volume and their names.
- ☐ Discuss the role of the Account Development Director (ADD) and their name(s).
- ☐ Discuss all of the above with your supervisor or their designee in addition to the scheduled team communications you will participate in.

Information Technology

- ☐ Meet/Call with your supervisor or their designee.
- ☐ Ensure that you are set up and can log in to all of the necessary Alliance Systems (Email, TMWS, ExpenseWire, Marketing Tool Kit Portal, PLE, NMIS, etc.)
- ☐ Discuss the Service Desk/IT area at the Resource Center: how, who and when to contact them.
- ☐ Discuss how to open or follow up on existing IT requests and Hardware/Software connectivity set up on the units.
- ☐ Discuss how IT sets department priorities and how you can escalate an issue with a known ticket.
- ☐ Review the Reference Manual Binder for: computer manuals, software CD's, Router/Switch Manuals, NMIS Manual and CD and the Master IP list.
- ☐ Demonstrate your ability to operate the Hardware and Software on the coach.
- ☐ Discuss how the IT infrastructure team operates, and how it helps facilitate site/coach connectivity and opening/closing sites.

Reporting and Documentation

- ☐ Meet with your supervisor or their designee
- ☐ Review function of the Procedure Entry Log (PLE), how to enter data, data that needs to be entered, when it is entered and how to edit.
- ☐ Review the PLE transmission at the end of the scanning day.
- ☐ Discuss alternative documentation in the event the PLE/computer is down or has issues, and notification of the MO.
- ☐ Review the paper work that is required in addition to the PLE: where it is generated and your responsibilities to complete such as: screening forms (A007), acknowledgements for injections (A046), post injection instructions (A054), informed consents (A014, A040, A045, A047 as applicable) , waiver of medical assistance (A051), retail handout for patient rights and responsibilities (retail- A050).
- ☐ Review the documentation and systems for scheduling patients, discuss your role and responsibilities in this process.
- ☐ NMIS (PET/CT/NM): Know the function, how to enter data and what data regarding radiopharmaceutical dosages needs to be recorded.

☐ Complete all the documentation for a patient with your supervisor or their designee.
☐ Review the Reference Manual binder for instructions on other office equipment: label maker, paper shredder, telephone manual and printer.

Questions to Answer Week One:

Human Resources

1. Once direct deposit is established, how would you view your pay stub?
2. How can you update your contact information in Workday?
3. Where would you find the Team Member Handbook?
4. What is the ATM and how do I access it?
5. In the ATM, where would you view the completion status for an assigned course?
6. Who is your HR Business Partner?

Position Overview

7. What are the expectations and responsibilities of your position at Alliance Radiology?
8. What are your responsibilities in the On-Boarding and Training Program?
9. Describe the Performance Review process.
10. What are characteristics are essential qualities in in Alliance's clinical personnel Team Members?
11. Describe the personal appearance policy.
12. What health screening tests are required? Who pays for them? Where do you get them completed?
13. What are your scheduled work hours?
14. How do you access the unit?
15. What are the required ACT modules?

Alliance History, Philosophy, Structure and Leadership

16. What are Alliance Radiology's Mission, Vision and Values?
17. Who is the President of Alliance Radiology?
18. Who is the Vice President of Operations in your Territory?
19. Who is the Director of Operations or Assistant Director of Operations in your Territory?
20. Who is your Manager of Operations (Territory Manager)?
21. Who are the AE or RAE that may market your sites?
22. Who is your ADD?
23. What departments at the resource center can support you?

Information Technology

24. What are the ways to contact IT to open a service desk ticket for assistance?
25. What do you do if you have an issue that needs escalation?
26. How does IT set priorities?
27. How should you follow-up on an existing open ticket?
28. In what locations does IT physically have staff on a daily basis?
29. How does the IT infrastructure team operate?
30. How do we initiate site/unit connectivity to open/close a site?
31. Where are all the IT Manuals?

Alliance Radiology Team Member Web Site

32. How do you access the TMWS?
33. What are the (4) main sections on the TMWS?
34. What is the Bravo! program?

Payroll

35. Where and how do you enter your time and mileage?
36. When is vacation/sick/float first available?
37. How do you correct a missed/incorrect entry?
38. What is the mileage policy and rate for team members?

Compensation

39. Describe your compensation plan.
40. How are you compensated for travel to and from customer sites?

Benefits

41. Where do you go on-line to enroll for your benefits?
42. Where would you go to cancel automatic enrollment in your 401(k) benefits?
43. What is the health assessment credit and what do you need to complete to receive the credit?

Travel & Entertainment Policy, Expense Reporting and Accounts Payable

44. Explain where and how you will enter expenses.
45. What do you do if you will have an expense that is outside of the T&E policy?
46. When can you submit for reimbursement for a meal, and what information needs to accompany the submission?

47. Can you explain the Travel & Entertainment limits for lodging? Meals?
48. What is the process of ordering necessary supplies from Staples?

Reporting and Documentation

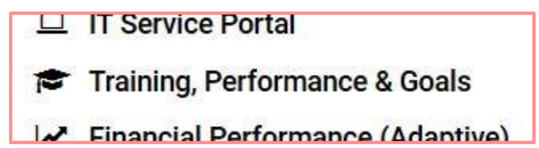
49. What is the PLE?
50. What data is entered into the PLE?
51. How do you correct data in the PLE?
52. What do you do if the PLE is down or has issues?
53. What is the required documentation related to patient scheduling?
54. List the paperwork documentation that you are responsible for on the coach.
55. What is purpose of NMIS? (PET/CT and NM Only)
56. What information is entered into NMIS? (PET/CT and NM Only)

Wrap up of Week One: Human Resources, Orientation, Safety, Emergencies and Documentation

It's time to review your first phase of training, ask questions, provide feedback and debrief with your Clinical Trainer! Prior to your next meeting/ conversation with your Clinical Trainer, take the time to summarize your learning and experiences from Phase One.

Also, please follow the below instructions to answer some questions on our Team Member Website (TMWS) and show us what you know. Once you've completed, you are onto Phase II!

1. Log in to the Team Member Website (TMWS)
2. Select "Training, Performance & Goals" from the list on the right side of the page.



3. Locate the "My Training" Section
   A. Click launch "Clinical Onboarding Program Phase One"
4. Once you complete the assessment your Manager/Supervisor will be notified of your score.
5. Schedule a meeting with your clinical trainer to let them know you completed the online training. In this discussion you may want to discuss key learnings, feedback, and what to expect in the next phases.