STATE INNOVATION MODEL COMMUNITY HEALTH WORKER INITIATIVE

Best Practices for Clinical Integration: Guide and Resource CHW ORIENTATION TO THE PRACTICE

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Executive Summary

Integrating CHWs

Best practice literature on familiarizing and orienting the CHW into the clinical practice is limited. "While we have advanced in our knowledge of CHW effectiveness in outreach, prevention, and control of disease risk factors, we have not kept pace in our knowledge gain of how to incorporate and sustain their roles within healthcare systems and at the community level."[1]

Recommendations

This manual offers recommendations based on what is suggested to be best practice for orienting the CHW to the clinical practice. In addition, the manual includes general best practice recommendations for orienting any new employee the workplace that is especially important to CHW integration. Achieving successful CHW integration includes creating a welcoming environment and providing clarity of roles and expectations of performance. However, careful consideration for the CHW is needed during this process since they are not a traditional clinical health professional.

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Orientation to the Practice

Plan for CHW orientation

Community Health Workers (CHWs) have been shown to be most effective "when they are fully integrated with interprofessional health care teams - when they have access to patients' health records, take part in case review meetings and rounds, and have a say in developing care plans."[2] Once the right CHW is hired, achieving this level of integration begins with the implementation of a thoughtful and comprehensive orientation of the CHW to the practice's plan and operations. Preparing a plan prior to the CHWs arrival, and establishing ongoing activities from day one of employment, is a positive way to build a strong organizational culture that supports the CHW for optimal performance.

Best practices

Currently, best practice literature on familiarizing and orienting the CHW into the clinical practice is limited. "While we have advanced in our knowledge of CHW effectiveness in outreach, prevention, and control of disease risk factors, we have not kept pace in our knowledge gain of how to incorporate and sustain their roles within healthcare

systems and at the community level."[3] This manual offers recommendations based on what is suggested to be best practice for orienting the CHW into the clinical practice. In addition, the manual includes general best practice recommendations for orienting any new employee into the workplace that is especially important to CHW integration. Achieving successful CHW integration includes creating a welcoming environment and providing clarity of roles and expectations of performance. However, careful consideration for the CHW is needed during this process since they are not a traditional clinical health professional.

Integration timeline

Establishing a timeline and expectation for the CHW to be up and running within their assigned role(s) is helpful towards alleviating early concerns for weak performance as the CHW absorbs new information. Finally, it is highly recommended to conduct a one-to-one orientation with the CHW supervisor to orient the new CHW to the practice. This can help to jumpstart the CHW and CHW Supervisors working relationship and build a foundation for communication within the care team.[4]

Preparations for CHW Arrival

Welcome packet

Organizational responsibilities for CHW orientation begin after receiving verbal acceptance of a job offer. Whether it's Human Resources (HR) or a designated staff member, a welcome packet should be prepared for the CHW for immediate response. This welcome packet might include items such as the

Figure 1: Checklist

- Prepare welcome packet
- Announce new hire
- Develop additional policies and procedures
- Identify a clean work space
- Organize schedule for first two weeks

conditional job offer letter, and their start date. This is a critical time for the organization to structure their approach and develop or follow an existing comprehensive checklist for executing a successful orientation to practice plan.

Announce new hire

"One frequently overlooked but critically important part of the onboarding process is announcing the presence of new staff members to the organization"[5], which can be accomplished through an e-mail announcement using a bio and a recent photo of the CHW. "If the role of the CHW is brand new to the organization, it is important to identify internal mentors and sources of support for the CHW. It is also crucial for the leadership to ensure that existing staff and providers are aware

that hiring a CHW may mean a significant cultural shift to the organization – both in how the organization functions internally, and in how it meets the needs of its clients and patients. Sustained, frequent communication about how best to incorporate input from the CHW is recommended."[6]

CHW position

As mentioned in the *Best Practices for Clinical Integration: Recruitment and Hiring* manual, regardless of the CHW's title, ensure that their job description is categorized as a CHW position, as this will help minimize role confusion. In an Assessment of Primary Care Teams in Federally Qualified Health Centers it was found that "Of the nine qualitative interviewees, eight said that their teams did include CHWs. Only two centers specifically titled these staff members "Community Health Workers"; other job titles included Outreach & Enrollment Representative, Outreach Worker, Client Advocate, Patient Navigator, HIV Outreach Worker, and others. The remaining respondent said that the center does not use CHWs, but job titles within the organization suggest that perhaps it does."[7] Clearly defining and reviewing roles and responsibilities within the care team may help to mitigate the risks of staff conflict, lack of productivity, and low-quality service delivery.

Liability coverage

"CHWs who are integrated into a hospital or healthcare system may fall under the umbrella of the organization's liability insurance; however, each facility should contact its insurance carrier for clarification prior to the CHW's arrival. Every organization's situation is unique, and the implications of a CHW program should be thoroughly reviewed with legal counsel."[8]

Because of the nature of a CHWs work, they often work in unique settings within the community, such as their client's homes and other community setting where safety may be a concern. "Topics for review include safety, security, compliance, risk management, liability, and insurance coverage."[9]
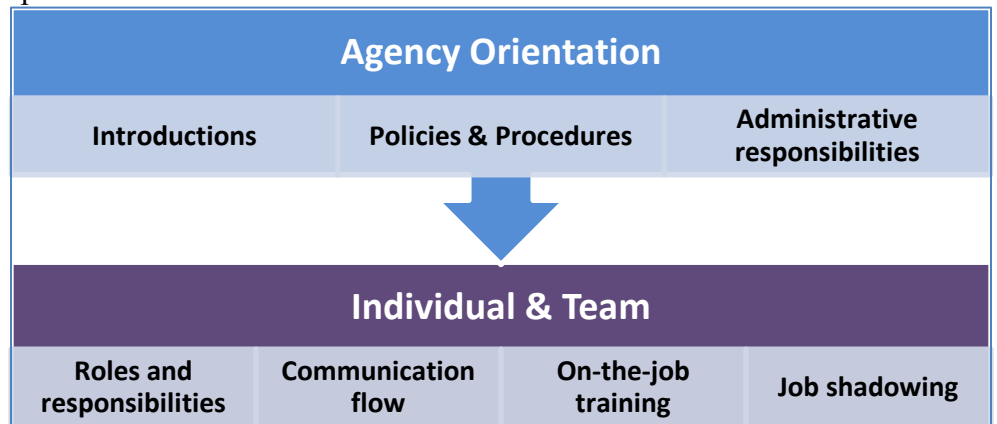
Integration Tasks

First Day

On the first day, it is vital to ensure that the CHW feels welcomed in a new environment by way of personal introductions with staff members, workspace readiness, a tour of the facility and a structured schedule for the day. Establishing a positive organizational culture from the beginning may increase your staff retention rates.

Keep in mind that for the CHW "this may be their first experience working in an office setting or a professional environment, while others may have had years of experience in similar environments. Take care not to assume the existence of skills around the use of the photocopier,

telephone system, and other office equipment. Instead, include introductions to and instructions around the use of office equipment as part of the orientation process."[10] Standardized protocols and tools like checklists, flowcharts, and educational materials, along with interview, assessment, and data collection forms, will help facilitate and organize the CHW's work, in addition, any supplies and equipment needed to complete their tasks should be made available to the CHW.[11] The diagram below summarizes the elements of the CHW orientation process:

Agency Orientation		
Introductions	Policies & Procedures	Administrative responsibilities

Individual & Team			
Roles and responsibilities	Communication flow	On-the-job training	Job shadowing

One to Three Months

It will be pivotal that during the CHWs orientation they are exposed to as many aspects of the organization as possible. "In the initial days of employment, they may benefit from shadowing other members of their team to better understand their work context, their role and the roles of others, and opportunities for collaboration."[12] Understanding individual and team roles is critical to building positive working relationships across several disciplines.

Additional CHW-specific training is necessary for all team members to learn what a CHW is, what they do, and how they will contribute to the team-based model of care. Who is providing this training? How will the team communicate with one another? How often will we meet to discuss important client and program issues? If a program champion has not yet been established, now is the time to assign one to lead the care team during the transformation process. They will be charged with troubleshooting issues of integration and ensure that all team members understand the role of a CHW on the care team. Allowing for the CHW to shadow members of the care team can be very beneficial. This gives them a chance to observe and learn about how each member of the care team is currently functioning and enables the CHW to gauge how they may best be integrated to compliment the care team.

During this time period it is also important to introduce the CHW to most, if not all of the departments and administrative staff, so that they get a better sense of the size, culture and offerings of the practice. The

CHW should feel as though they belong and are able to recognize a face that they have met in the early stages of employment, will provide the opportunity for a smile, a hello, and possibly, a short conversation, to build morale for the future.

Sample topics for on-the-job orientation

- **Team introductions**
- **Administrative information**
- **Define specific job responsibilities**
- **Expectations for Supervision for both the CHW and the Supervisor**
- **IT orientation**
- **Reporting requirements:**
  - **Entering information into databases in accordance with agency policies**
- **Work-flow issues:**
  - **Chain of command**
  - **Problem solving**
- **Commmunication:**
  - **Case review meetings**
  - **Daily huddles**

Six to Twelve Months

"CHWs who receive ongoing mentoring and support, as well as acknowledgment of their efforts, are more likely to be motivated to excel in their respective roles."[13] The manager or supervisor has a duty to make sure the CHW is comfortable, connected and productive within the practice.[14] They can ask another CHW or healthcare team member to be a mentor for the new CHW. This provides a non-threatening way for the CHW to build a relationship with someone from within the practice. The best managers create a support network for their new hires to help them quickly get up to speed.[15] In addition, it's important for a manager to take the time to build a relationship with the CHW so they can recognize the importance of being available to answer questions and provide feedback, which, in turn, is a critical investment of time.[16]

Onboarding Suggestions

To start, employers should make sure new staff members are properly welcomed to the organization and briefed on important information. Here are a few things you can do:

1. Appoint a point person or mentor, in addition to the supervisor, who can welcome and orient the new staff member to the organization. Make sure the mentor has specific tasks to cover for the first day, week, and following three months.
2. Send a card or letter welcoming him/her to the agency. Include needed paperwork, employee handbook, benefits, etc.

3. Send an agenda, along with the offer letter, letting the employee know what to expect on the first day.
4. Order business cards (if applicable).
5. Have any ID and security cards ready.
6. Send a welcome e-mail, along with a new hire FAQ sheet and/or the necessary forms to be filled out.
7. Make sure the employee's work area is ready.
8. Make a new hire announcement and on the first day, introduce the new staff member to co-workers.
9. Create lunch plans for your new hire's first few days, helping her/him feel at ease.
10. Don't leave new hires to figure out the organization's culture and unwritten rules on their own. For instance, what is the preferred method of communication – e-mail, phone, or meetings? How are decisions made? When are employees expected to act on their own?
11. With the right people on board, the battle shifts to retention.[17]

By adopting some of these simple suggestions, your new CHW will become an "Old-Timer" and will be able to help recruit new CHW staff. In addition, staff will want to stay with the practice. Helpful interaction among staff, and in a positive work environment will go a long way to success for all.

Toolkits & Resources

http://www.health.state.mn.us/divs/orhpc/workforce/emerging/chw/2016chwtool.pdf

http://www.aha.org/content/16/CHW_resource.pdf

http://www.centerforhealthimpact.org/wp-content/uploads/2015/12/CHW-Orientation-Toolkit.pdf

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