

# Streamlining Onboarding Communication and Workflow Using Technology

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*Digital Development and Education Specialist: CBT*



# Learning Outcomes

By the end of this session learners will be able to:

- Recognize the value of utilizing technology to have a standardized, streamlined onboarding communication process.
- Describe how to initiate and begin managing the change of using technology forward onboarding communication tools.
- Identify the need of an ongoing review process of the tools and methods used to communicate the steps of the onboarding process.

# Stanford Health Care General Clinical Orientation (GCO) Workflow

## Designations & Awards



# Background: General Clinical Orientation (GCO)



Center for Education and Professional Development (CEPD) centralized department manages onboarding for over 50 units



Program onboards over 1500 new hires and travelers to organization per year



Cadence: 32 weeks per year (2-3 orientation sessions per month)



Class size: 20-120

# Key Questions Considered

1. Are your managers able to provide clear and concise onboarding communication for the first week of onboarding/orientation?
2. How easy is it for your managers to access onboarding resources and create a welcome letter for a new hire/traveler?

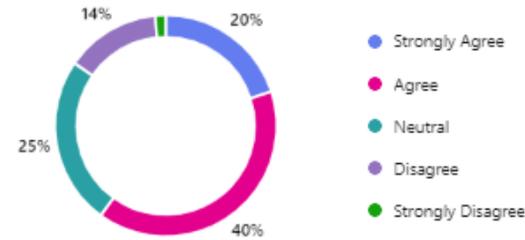
# Survey on GCO Workflow

## General Clinical Orientation Notification Process Survey

Please complete survey on GCO Notification current state

Center for Education and Professional Development (CEPD)

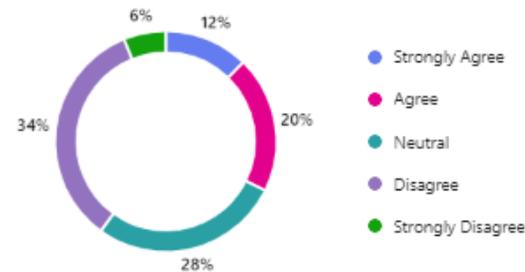
1. I am able to provide my new hire with clear and concise ins... ✓ ↗



2. With the GCO information we provide you, how long does i... ✓ ↗



3. I am satisfied with the ease of locating/accessing the onbo... ✓ ↗



4. What do you like about the GCO notification process? ✓ ↗

65 responses submitted



5. What do you dislike about the GCO notification process? ✓ ↗

65 responses submitted

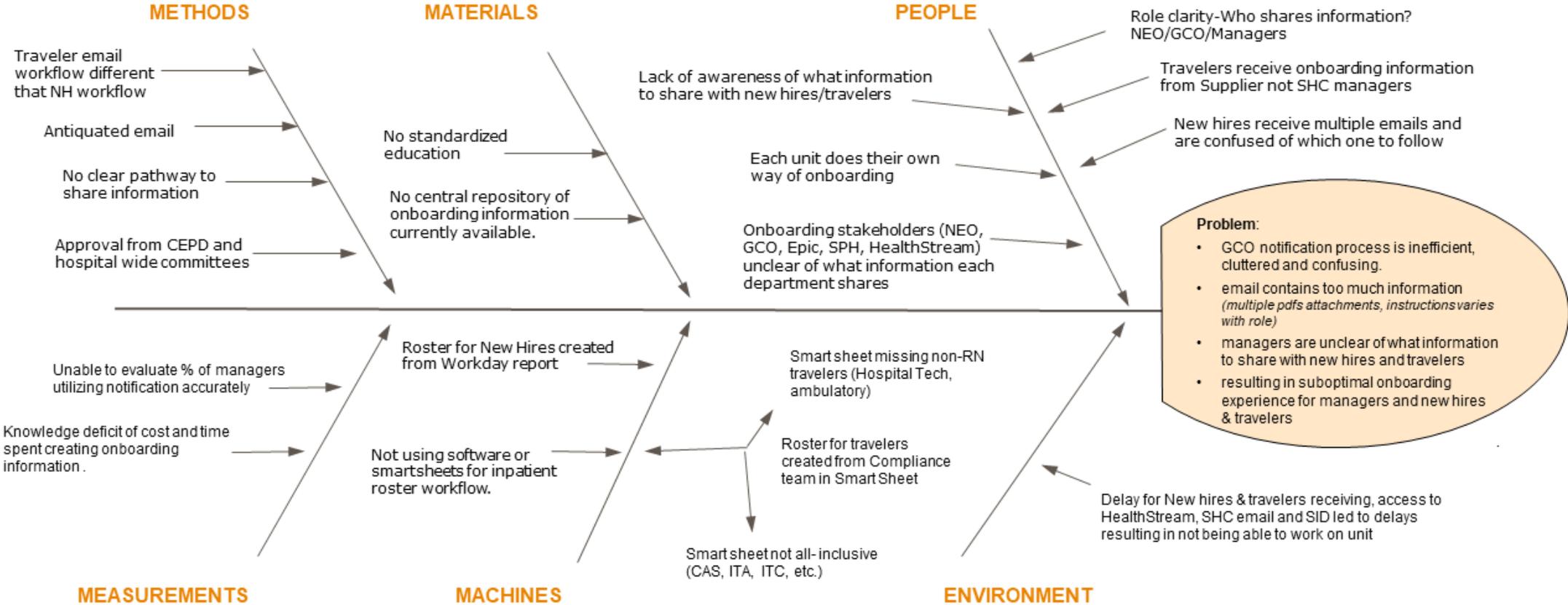
onboarding email

6. Additional feedback... ✓ ↗

65 responses submitted

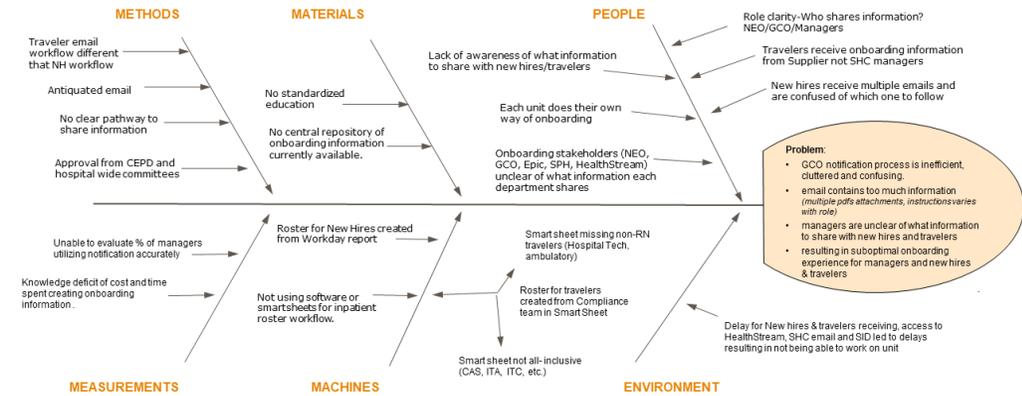
process is helpful

# Method/Process



# Method/Process

- Pilot group of key stakeholders
- Based on feedback we developed:
  - Email template
  - Central website for manager & GCO resources
  - Cloud-based folders for new hire content
- Updated “GCO Ready Roster” communication
- Had departments take back ownership of their sections of GCO process





# Original GCO Workflow

Stanford Health Care  
**SHC INTERPROFESSIONAL CORE COMPETENCY: INITIAL**  
 Position Title: \_\_\_\_\_ Unit: \_\_\_\_\_ Employee Name: \_\_\_\_\_

The above staff member has demonstrated the knowledge, skills, and attitudes necessary to provide care appropriate to the patients served on his or her assigned unit. The individual has demonstrated knowledge of the principles of interprofessional competencies and possesses the ability to assess data reflective of the patient's status and interpret the appropriate information needed to identify each patient's requirements relative to their specific needs.

Stanford Health Care  
**SHC REGISTERED NURSE CORE COMPETENCY: INITIAL**  
 Position Title: \_\_\_\_\_ Employee Name: \_\_\_\_\_ Unit: \_\_\_\_\_

The above staff member has demonstrated the knowledge, skills, and attitudes necessary to provide care appropriate to the patients served on his or her assigned unit. The individual has demonstrated knowledge of the principles of nursing core competencies and possesses the ability to assess data reflective of the patient's status and interpret the appropriate information needed to identify each patient's requirements relative to their specific needs.

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Stanford Health Care  
**Inpatient Transfer**  
 Location: Stanford Research Institute (SRI) 301 Ravenswood Avenue, Menlo Park, CA 94025

Stanford Health Care  
**Safe Patient Handling (SPH)**  
 Location: Stanford Research Institute (SRI) 301 Ravenswood Avenue, Menlo Park, CA 94025

NEO Week Schedule for Tuesday

Program Title	Time	Who Attends
General Clinical Orientation (GCO)	0800-1100	Direct patient care roles listed below:
		<ul style="list-style-type: none"> <li>Advance Practice Providers (APP)</li> <li>Assistant Patient Care Manager (APCM)</li> <li>Case Manager (CM)</li> <li>Clinic Manager</li> <li>Clinical Dietitian</li> <li>Clinical Nurse Specialist (CNS)</li> <li>ED Hospital Technician</li> <li>Imaging Services</li> <li>CT Technician</li> <li>RET Technician</li> </ul>

Stanford Health Care  
**HealthStream Instructions**

1. ON CAMPUS: Link to the site from the Stanford Intranet SHC CONNECT

2. OFF CAMPUS: Browse to: <http://www.healthstream.com/hlc/stanford>

Stanford Health Care (SHC) Employees:  
 User ID is your SHC employee number with 1 or 2 leading zeros to make it 6 digits total (i.e. user ID: 12345 = 012345)

GENERAL CLINICAL ORIENTATION

2023 Master Orientation Calendar

Month	S	M	T	W	T	F	S
January							
February							
March							
April							

Stanford Health Care  
**UNIT SECRETARY ASSISTANT (USA) COMPETENCIES**

Name: \_\_\_\_\_ Hire Date: \_\_\_\_\_  
 Manager: \_\_\_\_\_ Unit/Department: \_\_\_\_\_

Instructions: Within 30 days of hire date, preceptor validates new hire USA meets the competency by placing initial and date in the appropriate column. When document filled out completely, new hire USA returns to manager to place in employee file.

Competency: Ability to apply in the work setting, the essential technical, interpersonal, and critical thinking skills that are needed to achieve the desired outcomes required by the varied circumstances of care at Stanford Health Care.

Competency Statement	Initial	Date	Performance Criteria
Unit Telephones: Efficiently operates telephone, using telephone country			A USA verifies that the new hire: <ul style="list-style-type: none"> <li>Answers phone within 1-3 rings, providing unit name and own name</li> <li>Writes down name of caller, message and contact information as needed</li> <li>Is courteous and respectful to caller</li> <li>Places both in-house and outside calls</li> <li>Plays caller on hold without using call</li> <li>Transfers call without disconnecting</li> <li>When transferring a call (whenever possible), provides caller's name and reason for call to receiving party</li> <li>Takes messages accurately (includes name of caller, date, time of call, reason for call), and relays message in a timely manner</li> <li>Responds immediately and appropriately to inquiries and requests</li> </ul>
PROHIB: Use the overhead and			A USA verifies that the new hire: <ul style="list-style-type: none"> <li>Does not use the overhead and</li> </ul>

GENERAL CLINICAL ORIENTATION

Job	Start Date	End Date	Start Time	End Time	Day	Week	Month	Year	Hours	Rate	Total	Notes
1	01/01/2023	01/01/2023	08:00	16:00	Monday	1	01	2023	8	12.45	99.60	
2	01/02/2023	01/02/2023	08:00	16:00	Tuesday	1	02	2023	8	12.45	99.60	
3	01/03/2023	01/03/2023	08:00	16:00	Wednesday	1	03	2023	8	12.45	99.60	
4	01/04/2023	01/04/2023	08:00	16:00	Thursday	1	04	2023	8	12.45	99.60	
5	01/05/2023	01/05/2023	08:00	16:00	Friday	1	05	2023	8	12.45	99.60	
6	01/06/2023	01/06/2023	08:00	16:00	Saturday	1	06	2023	8	12.45	99.60	
7	01/07/2023	01/07/2023	08:00	16:00	Sunday	1	07	2023	8	12.45	99.60	
8	01/08/2023	01/08/2023	08:00	16:00	Monday	1	08	2023	8	12.45	99.60	
9	01/09/2023	01/09/2023	08:00	16:00	Tuesday	1	09	2023	8	12.45	99.60	
10	01/10/2023	01/10/2023	08:00	16:00	Wednesday	1	10	2023	8	12.45	99.60	
11	01/11/2023	01/11/2023	08:00	16:00	Thursday	1	11	2023	8	12.45	99.60	
12	01/12/2023	01/12/2023	08:00	16:00	Friday	1	12	2023	8	12.45	99.60	
13	01/13/2023	01/13/2023	08:00	16:00	Saturday	1	13	2023	8	12.45	99.60	
14	01/14/2023	01/14/2023	08:00	16:00	Sunday	1	14	2023	8	12.45	99.60	
15	01/15/2023	01/15/2023	08:00	16:00	Monday	1	15	2023	8	12.45	99.60	
16	01/16/2023	01/16/2023	08:00	16:00	Tuesday	1	16	2023	8	12.45	99.60	
17	01/17/2023	01/17/2023	08:00	16:00	Wednesday	1	17	2023	8	12.45	99.60	
18	01/18/2023	01/18/2023	08:00	16:00	Thursday	1	18	2023	8	12.45	99.60	
19	01/19/2023	01/19/2023	08:00	16:00	Friday	1	19	2023	8	12.45	99.60	
20	01/20/2023	01/20/2023	08:00	16:00	Saturday	1	20	2023	8	12.45	99.60	
21	01/21/2023	01/21/2023	08:00	16:00	Sunday	1	21	2023	8	12.45	99.60	
22	01/22/2023	01/22/2023	08:00	16:00	Monday	1	22	2023	8	12.45	99.60	
23	01/23/2023	01/23/2023	08:00	16:00	Tuesday	1	23	2023	8	12.45	99.60	
24	01/24/2023	01/24/2023	08:00	16:00	Wednesday	1	24	2023	8	12.45	99.60	
25	01/25/2023	01/25/2023	08:00	16:00	Thursday	1	25	2023	8	12.45	99.60	
26	01/26/2023	01/26/2023	08:00	16:00	Friday	1	26	2023	8	12.45	99.60	
27	01/27/2023	01/27/2023	08:00	16:00	Saturday	1	27	2023	8	12.45	99.60	
28	01/28/2023	01/28/2023	08:00	16:00	Sunday	1	28	2023	8	12.45	99.60	
29	01/29/2023	01/29/2023	08:00	16:00	Monday	1	29	2023	8	12.45	99.60	
30	01/30/2023	01/30/2023	08:00	16:00	Tuesday	1	30	2023	8	12.45	99.60	
31	01/31/2023	01/31/2023	08:00	16:00	Wednesday	1	31	2023	8	12.45	99.60	

# Updated GCO Workflow

## New GCO process

1. Email with hyperlink to dynamic roster
2. Standardized email template for managers
3. Streamlined attachments
4. A central place for manager resources
5. Online place for new hire resources

**GCO Roster Ready**

General Clinical Orientation  
To: Madlangbayan, Marjorie

Attachments: Manager's New Hire Welcome Email Template.oft (121 KB), 1\_17\_2023 - SPH\_Zoll Report.pdf (90 KB)

Hello all,

The General Clinical Orientation (GCO) Roster Smartsheet is ready for review and located on the GCO Landing page here: <https://shcconnect.stanfordmed.org/depts/PatientCare/CEPD/P>

Attached is the Manager's New Hire Welcome Email Template. Please utilize this template to provide your new hire with Week 0 information.

1. Fill in the <insert> areas of the provided email template.
2. Delete the links that are not applicable.
3. Review your new hire's Safe Patient Handling (SPH) group number: See attached
4. Insert SPH group number into the template.

**Important reminder:**  
All GCO attendees must complete the **Initial SHC Interprofessional Core Competency** form within 30 days of hire date. A copy of this competency is located on the GCO Landing Page.

**GENERAL CLINICAL ORIENTATION TEAM**  
[GeneralClinicalOrientation@stanfordhealthcare.org](mailto:GeneralClinicalOrientation@stanfordhealthcare.org)

Have a Question about **General Clinical Orientation**, please submit a ticket [here](#).

-For CEPD related inquiries, Visit [AskCEPD](#)

-For all HealthStream inquiries, please submit a ticket using [HealthStream ServiceNow](#)

-For Epic training inquiries, please email [EpicEducation@stanfordhealthcare.org](mailto:EpicEducation@stanfordhealthcare.org)

**Stanford MEDICINE** | Health Care

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# GCO Roster: Email Template

- GCO Roster email has only 2 attachments:
  - Email template
  - Safe Patient Handling (SPH) and Zoll schedule

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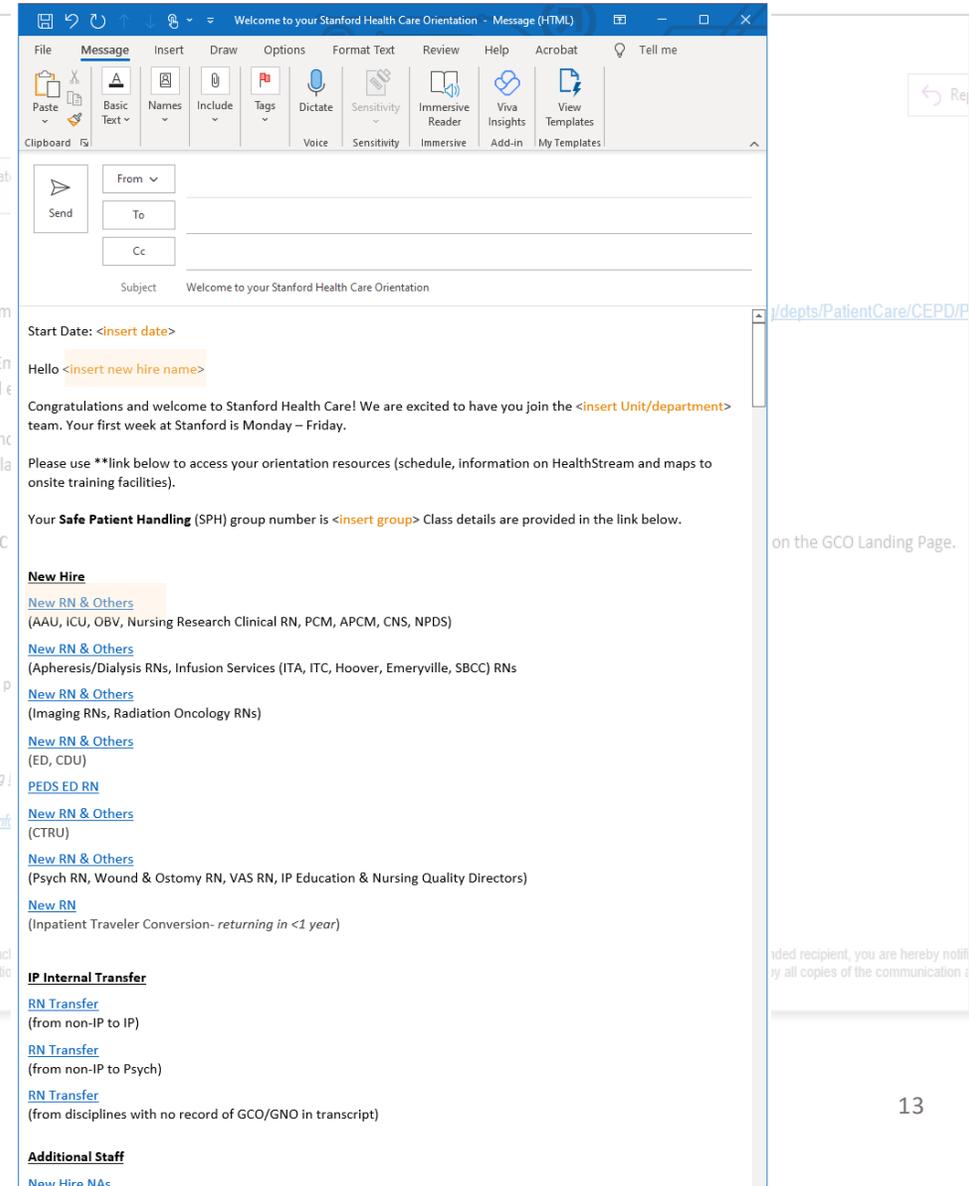
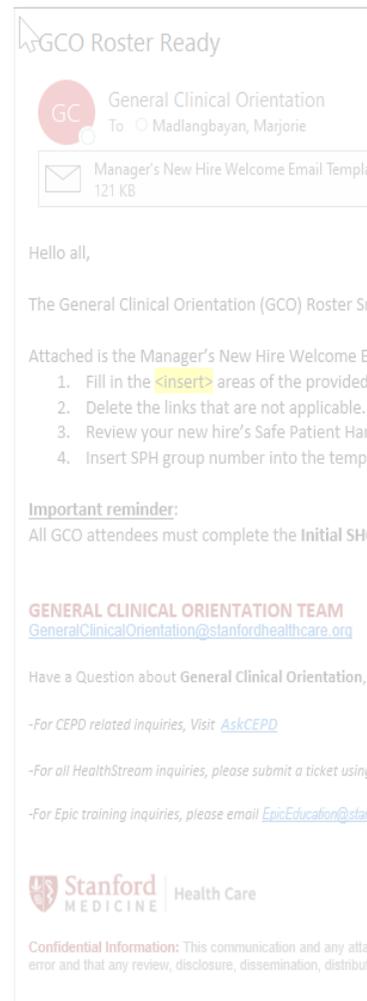
**Confidential Information:** This communication and any attachments may contain confidential or privileged information for the use by the designated recipient(s) named above. If you are not the intended recipient, you are hereby notified that any review, disclosure, dissemination, distribution or copying of it or the attachments is strictly prohibited. If you have received this communication in error, please contact me and destroy all copies of the communication.

# GCO Roster: Email Template

- GCO Roster email has only 2 attachments:
  - Email template
  - Safe Patient Handling (SPH) and Zoll schedule

## Email Template

- Managers edit template for individual new hire.



# GCO Roster: Email Template

- GCO Ready Roster email has only 2 attachments:

- Email template
- SPH report

## Email Template

- Managers edit template for individual new hire.
- Keep the hyperlink related to the hiring
- The hyperlink takes the new hire to all the information they need for week 0 in a cloud-based folder

The screenshot shows an Outlook window titled "Welcome to your Stanford Health Care Orientation - Message (HTML)". The ribbon includes File, Message, Insert, Draw, Options, Format Text, Review, Help, Acrobat, and Tell me. The "Options" tab is active, showing fields for From, To, and Cc, and a Subject line with the text "Welcome to your Stanford Health Care Orientation". The email body contains the following text:

Hello all,

The General Clin...

Attached is the f...

1. Fill in th...
2. Delete t...
3. Review y...
4. Insert SP...

**Important remi...**  
All GCO attende...

**GENERAL CLINIC**  
[GeneralClinicalOr...](#)

Have a Question a...

-For CEPD related in...

-For all HealthStrea...

-For Epic training in...

**Stanford**  
MEDICINE

Confidential Informa...

error and that any re...

Start Date: <insert date>

Hello <insert new hire name>

Congratulations and welcome to Stanford Health Care! We are excited to have you join the <insert Unit/department> team. Your first week at Stanford is Monday – Friday.

Please use \*\*link below to access your orientation resources (schedule, information on HealthStream and maps to onsite training facilities).

Your **Safe Patient Handling** (SPH) group number is <insert group> Class details are provided in the link below.

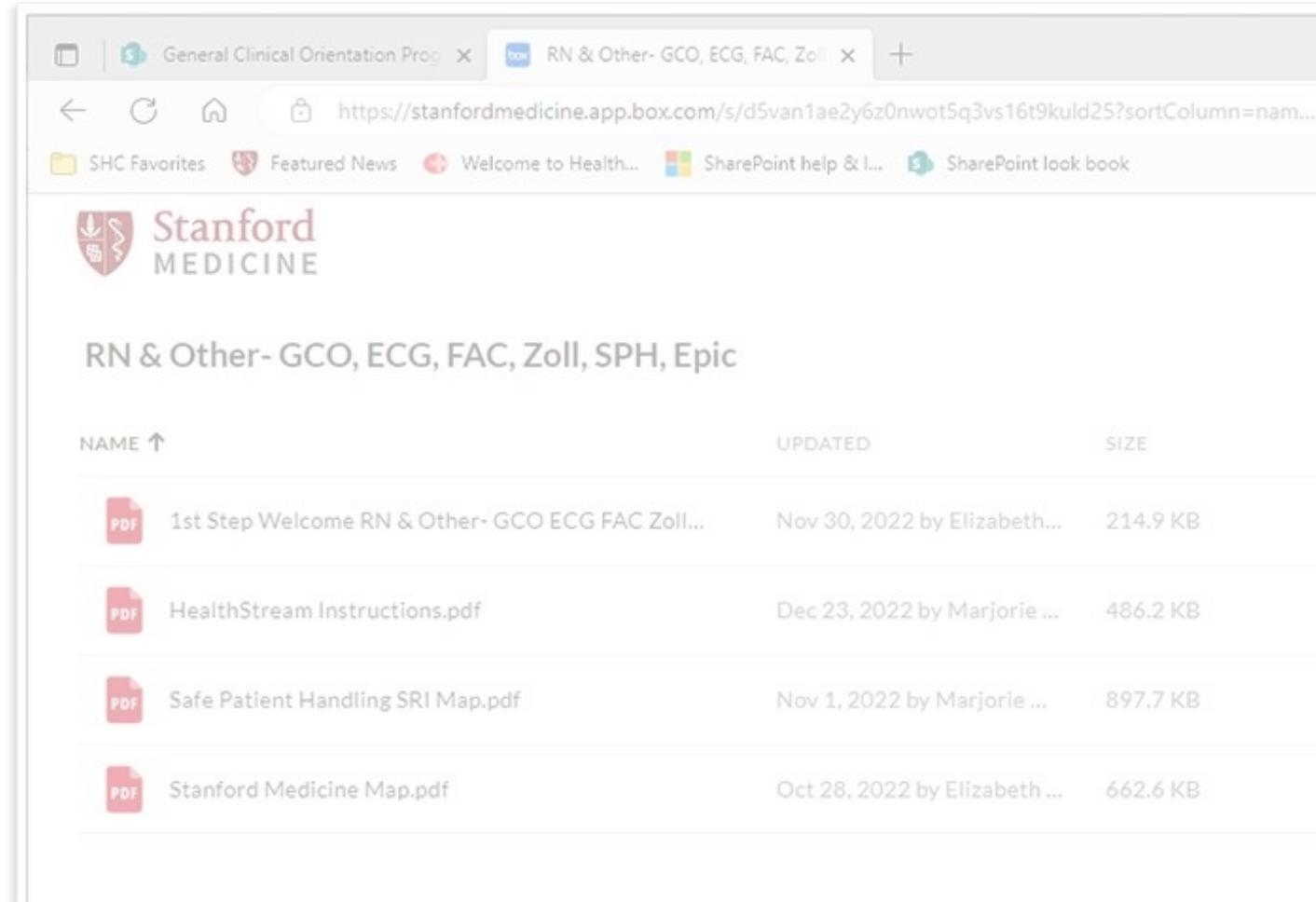
**New RN & Others**  
(AAU, ICU, OBV, Nursing Research Clinical RN, PCM, APCM, CNS, NPDS)

Kind regards,  
<Insert Department> Management team  
<Insert PCM name>  
<Insert PCM contact info>

<Insert APCM name, day shift>

# GCO Resources

- New hire resources in cloud-based folder
  - Welcome letter with their week 0 schedule
  - Instructions on how to get into our learning management system to complete required training
  - Maps for training areas and the hospital





# To a New Dynamic Roster

FINAL GCO Roster - FY2023 - Sm

app.smartsheet.com/sheets/4QhHPXwRP64P9x5Wrc3J4vrFhhPqm6QPpxM8W6r1?view=grid

FINAL GCO Roster - FY2023

	GCO Tuesday Date	Pres... at GCO	NAO	Last Name	First Name	Dept/Unit Name	Cost Ctr	Job Title	Job Code	Manager's Name	EEID - Employee ID	Empl... Email	Employee Phone Number	SPH/Zoll	EPIC	ECO Assessment	FAC	SPH/Zoll Group	SPH/Zoll Training Date & Time	ED Traveler Only - N95 Mask Fitting	Notes
1	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			FAMILY PRACTICE	70836	PATIENT CARE C	600484					No	No	No	No	n/a	n/a	n/a	late interface 11/11; reschedule to 12/6 GCO, rescheduled for 1/10/2023.
2	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			INPATIENT CASE	83602	CASE MANAGER	600138					No	No	No	No	n/a	n/a	n/a	Absent to 12/6 GCO, reschedule to 12/13/2023.
3	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			INPATIENT CASE	83602	EXEC DIR-SOCI	101740					No	No	No	No	n/a	n/a	n/a	Absent to 12/6 GCO, reschedule to 12/13/2023.
4	01/10/23	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Psych H2	63472	NURSING ASSIS	700020					completed	completed	No	No	n/a	n/a	n/a	Late to GCO, will make-up G 1/10/2023. All other onboarding week.
5	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			GI Oncology	70793	Nurse Coordinato	400037					No	No	No	No	n/a	n/a	n/a	Missed GCO 12/13- resched
6	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			Family Medicine	70836	Patient Care Co	600484					No	No	No	No	n/a	n/a	n/a	Missed GCO 12/13- resched
7	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU K7	61777	CLINICAL NURSI	400018					completed	completed	completed	completed	n/a	n/a	n/a	All onboarding completed, G rescheduled 1/10/23
8	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			Psych G2P	63482	NURSING ASSIS	700020					completed	completed	No	No	n/a	n/a	n/a	All onboarding completed with NAO is only pending due to 1/10/2023.
9	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>				71842	Relief Optometris						No	No	No	No	n/a	n/a	n/a	added per Benjamin, APCM req attendance for this GCO
10																					
11	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			CANCER CENTER	88233	ASST PATIENT C	101801					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
12	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU G1	61713	CLINICAL NURSI	400017					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
13	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU B2	61612	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
14	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU C3	61730	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
15	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU C3	61730	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
16	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU E3	61733	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
17	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU E3	61733	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	Traveler Conversion < 1 year for SPH, ECO, FAC required.
18	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU E3	61733	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
19	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU EGR	61642	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
20	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU F3	61753	CLINICAL NURSI	400018					No	No	No	Yes	n/a	n/a	n/a	Traveler Conversion < 1 year to
21	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU G1	61713	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
22	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU M5	61795	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
23	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU M5	61795	CLINICAL NURSI	400018					No	No	No	Yes	n/a	n/a	n/a	Traveler Conversion < 1 year to
24	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			AAU M5	61795	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	
25	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			Echo Lab		CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	s/w Lindsay, will schedule GCO,
26	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			ICU E2	60142	CLINICAL NURSI	400018					No	No	No	Yes	n/a	n/a	n/a	Traveler Conversion < 1 year to
27	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			ICU K4	60174	CLINICAL NURSI	400018					No	No	No	Yes	n/a	n/a	n/a	Traveler Conversion < 1 year to
28	01/10/23	<input type="checkbox"/>	<input type="checkbox"/>			ICU M4	60194	CLINICAL NURSI	400018					Yes	Yes	Yes	Yes	Group 3	Wednesday 0600-1130	n/a	

# GCO Website

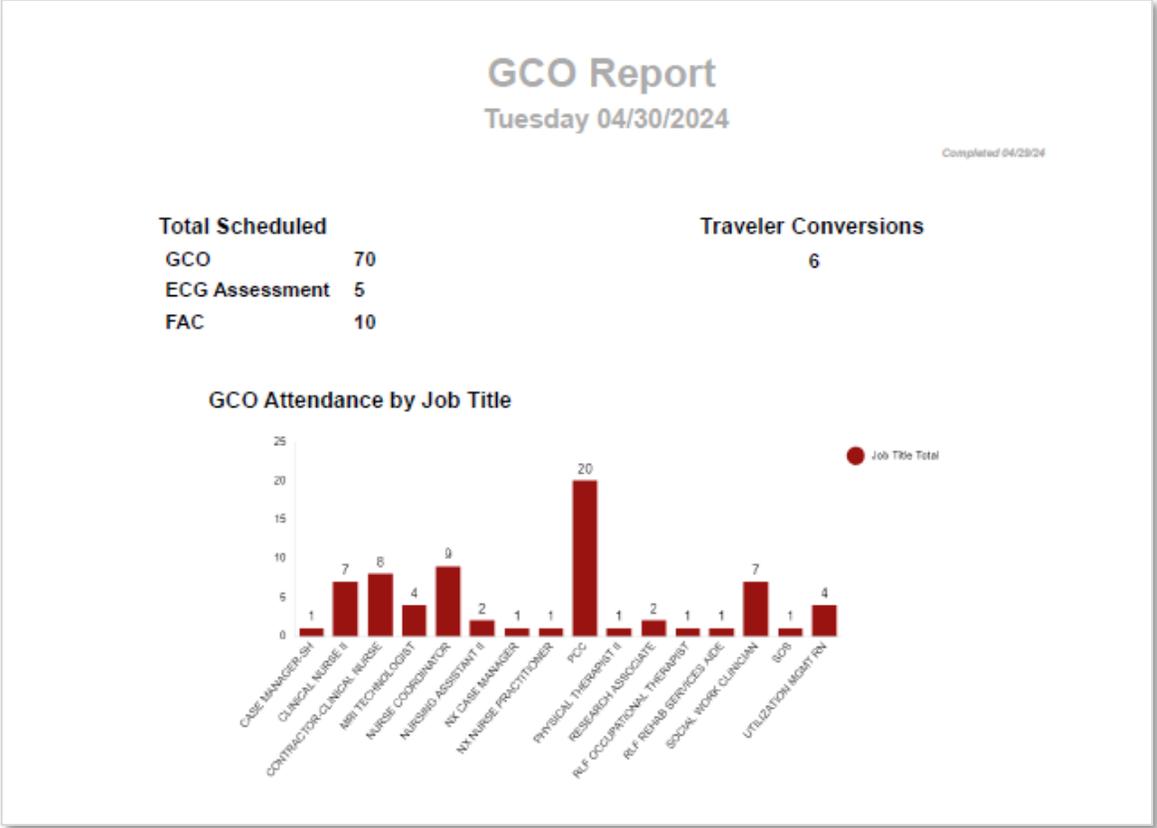
Some of the resources include:

- Quick access to the GCO Roster, Late Add-Ons and FAQ
- One point lesson(s) on the change in workflow and how to use the tools provided
- Direct link to the current GCO online program

The screenshot displays the GCO website interface. At the top, there is a search bar and navigation links for NEWS, ORGANIZATION, POLICIES, Stanford MEDICINE, SHC CONNECT, CITRIX LOGIN, and CONNECT TO. Below the navigation is a header for the Center for Education & Professional Development (CEPD) with a 'GCO' link. The main content area features a banner for the 'General Clinical Orientation Program' with buttons for 'GCO Roster', 'GCO Roster: Late Add-On', and 'GCO FAQ'. A meeting announcement for 'Tuesday of Orientation Week' (8:00am - 11:15am) is shown, including a Meeting ID (381 726 984), Passcode (156101), and a Zoom link. An image of a person on a video call is also present. Below this is a section for 'Onboarding Resources for Managers' with links to various documents like 'OPL GCO Roster Smartsheet', 'OPL Manager New Hire Welcome Email-template', 'OPL GCO Notification process changes', 'OPL to View Traveler Week 0 Schedule', 'RN's and Others: Competency & Onboarding', 'Nursing Assistants & Unit Secretaries', and 'Initial SHC Interprofessional Core Competency'. There are also links for 'Master Calendar' (2023 - 2024 Orientation Calendars) and 'AskCEPD'. At the bottom, there are social sharing icons (4 people liked this, 5192 Views, Save for later) and a copyright notice for Stanford Health Care.

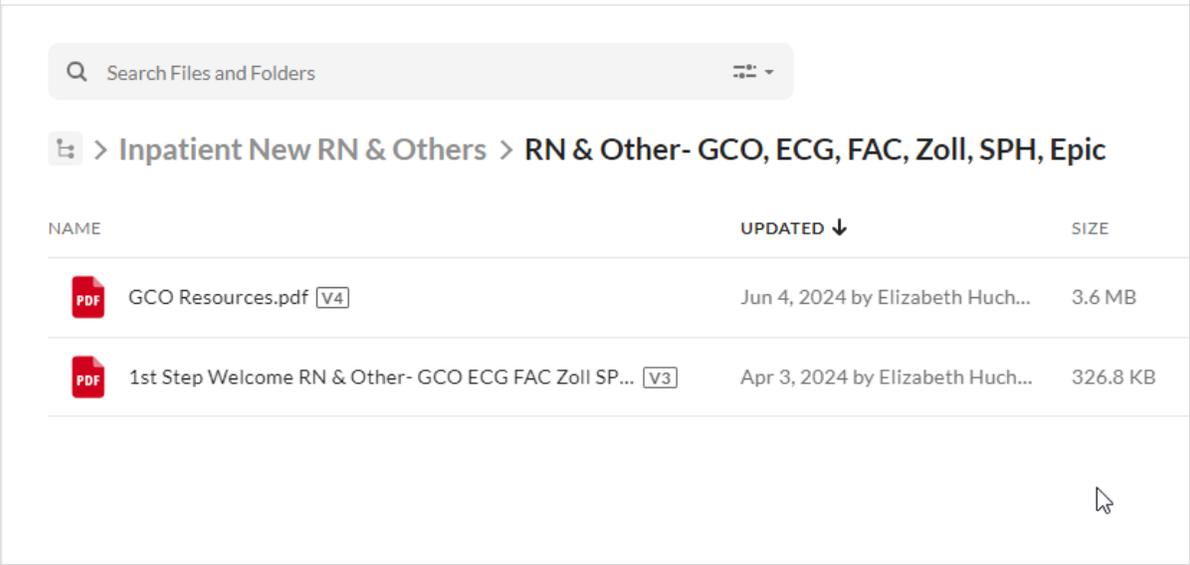
# Outcomes

- 34 % decrease in IT tickets relate to onboarding
- Decrease in email inquiries
- Over 7000 visits to the website to date
- Ability to create dashboards
- Increased efficiency, collaboration, and satisfaction for managers, new hires, and our CEPD team



# Lessons Learned

- Keep clear communication with managers and key stakeholders
- Make resources technology friendly and set up a cadence for review
- Create Templates
- Additional changes made to cloud based resources
  - Development of an eBook



The screenshot shows a file explorer window with a search bar at the top. Below the search bar, the breadcrumb path is: > Inpatient New RN & Others > RN & Other- GCO, ECG, FAC, Zoll, SPH, Epic. The main area displays a table of files with columns for NAME, UPDATED, and SIZE.

NAME	UPDATED ↓	SIZE
 GCO Resources.pdf [V4]	Jun 4, 2024 by Elizabeth Huch...	3.6 MB
 1st Step Welcome RN & Other- GCO ECG FAC Zoll SP... [V3]	Apr 3, 2024 by Elizabeth Huch...	326.8 KB

# Questions to Consider and Contact Information

1. What are the main onboarding communication issues for providing key information to managers, educators and the new hired staff?
2. What digital tools are you using to communicate information for the onboarding program/process?
3. What new digital tools can you offer to help communicate information for the onboarding program/process?



**Please reach out if you have more questions and would like to learn more**

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