SUPPLEMENTARY INFORMATION PACKET

Health Center Recruitment & Retention:
Maximize Your Success!

Presented by:
Andrea Martin, Workforce Development and Member Services Director,
Community Health Association of Mountain/Plains States (CHAMPS)
Julie Reinders, Senior HR Generalist/Provider Specialist,
Clinica Family Health Services (CFHS)

Live Broadcast Date/Time:
Tuesday, March 19, 2013
11:30am–1:00pm Mountain Time / 12:30–2:00pm Central Time

Learning Objectives:
Through participation in this webcast, participants will be able to:
1. Understand the unique preferences and tendencies of Region VIII health center staff, as expressed in the **2011 Region VIII Heath Center Recruitment& Retention Survey**, and be able to utilize position-specific details to tailor recruiting and retention practices.
2. Understand the impact of a provider onboarding program on improved satisfaction and ultimately higher retention rates, and be able to utilize this information to gain leadership buy-in for the program.
3. Identify components of the onboarding program that can be realistically implemented at the health center, and understand how to successfully implement those components.
4. Be able to complete a provider orientation satisfaction survey before and after implementing the new program to measure its impact, and be able to communicate results to leadership for support of ongoing program improvements.

CONTENTS

HRSA PERFORMANCE IMPROVEMENT & PROGRAM REQUIREMENTS AREAS

This event supports strong program management at Region VIII Community, Migrant, and Homeless Health Centers (CHCs) by **addressing the following HRSA Health Center Performance Improvement and Program Requirements Areas:**

- *Program Requirements: Services – Staffing Requirement; Management & Finance – Key Management Staff*

CONTINUING EDUCATION CREDIT

This live program has been approved for 1.25 (General) recertification credit hours toward PHR, SPHR and GPHR recertification through the HR Certification Institute. Please be sure to note the program ID number on your recertification application form. For more information about certification or recertification, please visit the HR Certification Institute website at www.hrci.org.

The program ID number will be provided on Certificates of Completion for those requesting credit for attendance. Application for credit for the online archive of this event will be filed immediately following the live event.

CHAMPS ARCHIVES

This event will be archived online and on CD-ROM. The online version will be available within two weeks of the live event, and the CD will be available within two months. CHAMPS will email all identified participants when these resources are ready for distribution. For information about all CHAMPS archives, please visit www.champsonline.org/Events/DistanceLearning.html.

DESCRIPTION OF CHAMPS

Community Health Association of Mountain/Plains States (CHAMPS) is a non-profit organization dedicated to supporting all Region VIII (CO, MT, ND, SD, UT, and WY) federally-funded Community, Migrant, and Homeless Health Centers so they can better serve their patients and communities. Currently, CHAMPS programs and services focus on education and training, collaboration and networking, workforce development, and the collection and dissemination of regional data. For more information about CHAMPS, please visit www.champsonline.org.

DESCRIPTION OF CFHS

Clinica Family Health Services is a community health center, a medical safety net for those who otherwise might fall through the cracks of the American health care system. They exist to provide basic health care to the low-income and uninsured people of their service area. CFHS provides a full spectrum of primary care services through their locations in southeastern Boulder, Broomfield, and western Adams counties. For more information about CFHS, please visit www.clinica.org.

SPEAKERS' BIOGRAPHIES

**Andrea Martin, Workforce Development and Member Services Director,
Community Health Association of Mountain/Plains States (CHAMPS)**
Ms. Martin has spent the past eight years of her career developing, presenting, and coordinating educational events for human resources and other staff members at community, migrant, and homeless health centers across Region VIII (CO, MT, ND, SD, UT, and WY). Additionally, she coordinates the collection and analysis of a wide variety of health center workforce metrics to assess the environment of the region, support health center efforts to improve recruitment and retention programs, and guide future CHAMPS support programs.

**Julie Reinders, Sr. HR Generalist/Provider Specialist,
Clinica Family Health Services (CFHS)**
Ms. Reinders began her Human Resources career as an employee trainer at General Electric in Waukesha, Wisconsin before moving west to accept an HR position at Horizon Organic Holding Company. When Horizon Organic went public, Ms. Reinders moved into community health with People's Clinic in Boulder, Colorado, which was later acquired by Clinical Family Health Services (CFHS). As of May of 2013, Ms. Reinders will have been working in HR for community health centers for 10 years. During this time she has held two HR positions; most recently (over the last 5 years), her position as *Provider Specialist* has offered her the opportunity to develop several provider-related programs within the department – one of these programs, the **New Provider Recruiting and On-Boarding** process, has proven to be a successful program for attracting and retaining fabulous providers for CFHS.

ADDITIONAL CHAMPS RESOURCES

CHAMPS 2011 Region VIII Recruitment & Retention Survey
www.CHAMPSonline.org/ToolsProducts/PublicationsMedia/Publications.html#RandR

CHAMPS 2012 Region VIII Health Center Salary Survey Report
www.CHAMPSonline.org/ToolsProducts/PublicationsMedia/Publications.html#salary

CHAMPS Recruitment and Hiring Tools
www.CHAMPSonline.org/ToolsProducts/RRResources.html#recruit

CHAMPS Orientation and Retention Tools
www.CHAMPSonline.org/ToolsProducts/RRResources.html#orient

CHAMPS Recruitment & Retention (R&R) Surveys and Data Webpage
www.CHAMPSonline.org/ToolsProducts/RRResources/RRSurveys.html

CHAMPS Education Health Center Initiative (EHCI) Webpage
www.CHAMPSonline.org/ToolsProducts/RRResources/EHCI.html

Other R&R Resources for Current and Future Health Center Staff
www.CHAMPSonline.org/ToolsProducts/RRResources/OtherRRResources.html

New Provider Recruiting Process

Process Step	If yes then	If no then
I. New Position		

CMD emails Provider Specialist about an open provider position. Providers are:
  1. all physicians
  2. dentist
  3. RDH
  4. NP or PA
  5. CMD/AMD
	the following position information is provided in writing by the CMD;
	  1. what position the FTE is replacing (or whether new position),
	  2. FTE,
	  3. POD,
	  4. Site,
	  5. supervisor,
	  6. supervising physician	

Provider Specialist creates and sends the internal posting to the COM/COT at each site to post the position internally at each site		
Provider Specialist creates a requisition in Ultipro and posts the position on the CFHS website		
Provider Specialist posts the position with the appropriate organizations		
II. New Candidates		
Candidates who express interested in the position will receive an email from Provider Specialist (currently all postings list the Sr Provider Specialist Generalist/ Provider Specialist as the contact) which states that their resume was received and they will be contacted if they are chosen for a screening	All resumes are saved in a new folder under the candidate's name in the provider recruiting folder found at: *P\Committees\ Medical Directors\Provider Recruiting* in the appropriate folder (MD, NP/PA, CNM, etc). All emails regarding this candidate going forward are saved in this folder	

Provider Specialist filters tProvider Specialistough the resumes by looking for particular variables which are desirable in a candidate	Variables to look for;
	  1. experience with a CHC
	  2. how many years of experience and with what type of organizations,
	  3. what specialty or field of medical experience,
	  4. work patterns,
	  5. Spanish-speaking,
	  6. work with underserved, mission driven experience and or interest
	  7. attitude	

Provider Specialist emails the appropriate member(s) of the CMD team (the MD lead, Mid level lead, OB lead, etc. which is typically determined in the Provider Specialist/CMD meeting) about which new candidates were placed in the recruiting folder and which candidates Provider Specialist feels are worth f/u with for screenings. The lead can comment on these		The candidates who are not chosen for a screening are sent a 'no thank you letter' or email. The candidate's folder is moved to the appropriate folder under provider recruiting (Clinica not interested, no Spanish, etc)

Process Step	If yes then	If no then
candidates and ask Provider Specialist to screen a particular candidate if they feel it is worthwhile.		
III. Screening Candidates		
Provider Specialist calls all desirable candidates for a 'screening' in which some basic questions are asked to determine whether the candidate is a potential interviewee	Screening questions; 1. does the candidate speak Spanish, 2. what type of organization do they want to work for, 3. do they have CHC interest, 4. what type of schedule are they interested in, 5. what location would they be interested in, 6. what type of work environment are they interested in (team approach, etc.?), 7. if they were selected for an interview – what dates/times would work, 8. if they were offered a position - when they are available to start, 9. is the candidate okay with taking call and what type, 10. answer any questions they have, 11. go over CFHS info - work environment, expectations, history, orientation overview, what makes CFHS a great place to work, visit expectations, ect.	
After the screening is complete, Provider Specialist will send an email to the appropriate members of the CMD team listing the screening details	If the lead is interested in the candidate, then the lead will provide Provider Specialist with the interview details; 1. date/time, agenda 2. interview team participants, 3. which site, which site tours and with who 4. (physician) which hospital tours depending on which site the candidate is interested in) and with who, also the doc on call that day 5. (physician) if lunch/dinner should be scheduled, 6. If the candidate is from out of town, the Administrative Assistant to the VP of Clinical Affairs will make the travel arrangements	If the lead is not interested then Provider Specialist will send a 'no thank you' letter/email to the candidate. The candidate's folder is moved to the appropriate folder under provider recruiting
IV. Interview Invitation and Interview Communication		
Provider Specialist will email the COM at the site in which the interview is scheduled to secure a conference room. The COM will schedule the room and confirm with Provider Specialist immediately.	If the candidate can attend the interview at the proposed date/time then Provider Specialist will email the lead and the interview participants, including the hosp tour doc and the doc on call that day to confirm the interview details.	If the candidate responds that they cannot participate in the interview on that date/time, Provider Specialist will email the lead and determine a

Process Step	If yes then	If no then
Provider Specialist will email an interview invitation to the candidate with the interview details; 1. date/time, agenda 2. location with map (site and hospital – if applicable), 3. interview participants, 4. lunch location, 5. site tour location(s) and with who, 6. hospital tour location(s) and with who (physician),	Provider Specialist will also cc the CDs, COMs, and Scheduling Specialist of each site which has providers participating so the provider schedules can be blocked for the interview/travel time/ and lunch or dinner, if appropriate. The COM will schedule the appropriate conference room for the interview at their site (physician) Provider Specialist will make the lunch reservation	different date/time
Provider Specialist will send out a reminder email to all interview participants (including the candidate) a couple days before the interview. Provider Specialist will include the following attachments with the reminder email to the participants (except the candidate) and cc the CDs and COMs; 1. candidate cv, 2. interview questions - with participant names designated, 3. interview evaluation form, 4. screening details		
V. Interview and Follow Up		
Provider Specialist will bring hard copies of the attachments above to the interview, along with water for the candidate. Provider Specialist will bring an interview packet for the candidate Provider Specialist will make sure the room is set up. (clean off tables, arrange tables/chairs, etc) Provider Specialist will greet the candidate, explain the interview process to the candidate and let them know when they should expect to be notified about the status of the position after the interview. Interview candidates should return their completed interview evaluation forms to Provider Specialist immediately following the interview, email them, or return them IOM	If the interview team and lead are interested in the candidate, the lead will notify Provider Specialist to move to the next step in the recruiting process	If the interview team and lead are not interested in the candidate, the lead will notify Provider Specialist and Provider Specialist will send a 'no thank you' letter or email to the candidate.
VI. References and Pre-employment Screening		
Provider Specialist will request references		

Process Step	If yes then	If no then
from the candidate and email the candidate the pre-employment screening forms		
Provider Specialist will email salary range, all benefit details including LRP links, copy of contract template		
Provider Specialist will check references	If references check out; 1. Provider Specialist will place the candidate on the salary scale 2. Provider Specialist will email the salary info to the CMD team 3. Provider Specialist will start the pre-employment screening process	If the references and/or the pre-employment query are returned with unfavorable results, Provider Specialist will discuss with CMD to determine whether the candidate is employable
Provider Specialist will offer position to Candidate	If the candidate accepts, then move the candidate's provider recruiting folder into 'hired' folder	If candidate does not accept, then move provider recruiting folder into the appropriate folder
VII. See Provider Hiring Process		

Provider Hiring Process

Process Step
I. New Provider Hire Communication

HR emails the folks on the 'new and term provider' email distribution list* to inform those Clinica Campesina employees, who need to know, that a new provider has been hired. The email includes the following info;
1. provider name
2. title
3. site
4. supervisor and supervising physician (if has been determined)
5. FTE
6. start date
7. POD (if has been determined)
8. HR will also site whether the position is a new position or whether the new provider is replacing an exiting provider or whether it is a combination of the two
 	
This email will prompt the following actions by the corresponding responsible parties;
1. if the provider is a physician the Executive Assistant will prepare a pager for the physician
2. IT will begin the process of securing a NextGen license and tablet for the provider
3. the Provider's supervisor along with the CD/COM, at the site, will determine and facilitate/ communicate through the appropriate channels the arrangement of the following:
    a. the type of workstation, chair, location @ the site, key to building (if needed)
    b. telecommunications (and location of phone) and/or software (NextGen license/tablet) the Provider will need.

HR emails the appropriate hospital (only Physicians) and CO Access a notification of the new provider hire and requests new provider privileging packets. Once the packets arrive, HR mails them to the provider (will be included with the credentialing packet if have been received) otherwise will be sent separately afterward (once received).
HR Provider Rep completes payroll note, gets approval, and submits it to payroll
II. New Provider Credentialing Packet and Contract (if applicable)
HR compiles the new provider internal credentialing packet (*see internal credentialing process*) including the new provider credentialing 'treats' and contract (if applicable - see below)
If the new provider is a Physician; HR completes a Physician Agreement (contract); 1. include correct call rates for hospital site (if applicable); 2. confirm salary and benefit info relative to FTE 3. get the CEO's signature on two copies 4. mail the copies to the Physician 5. request that a signed copy is returned.
III. New Hire Provider Orientation/Evaluation and Resource Binder
HR completes the new hire provider orientation and evaluation (*see new provider orientation process*) and then emails it to; 1. participants scheduled to meet with the provider at Admin. 2. CDs and COMS; who distribute it to the employees, from the site, that are scheduled to meet with the provider 3. CMD 4. EMR trainer 5. new provider HR meets with new provider on the first day to complete new hire paperwork, holiday bank form and take their picture for the name badge Once the provider has completed new provider orientation, HR requests the completed new provider orientation evaluation from the provider

Process Step

HR also creates a new provider resource binder for the provider including;
   1. provider's template (from CD or COM at site)
   2. copy of the provider's scope of practice for CMD to explain/sign with new provider at their scheduled meeting time during new provider orientation
       a. the CMD will return signed scope of practice to HR immediately so the new provider's temporary privileges can be signed off on (see step IV)

IV. Returned Internal Credentialing Packet and Temporary Privileges
HR receives completed internal credentialing packet from Provider

HR gets Provider's temporary privileges approved (*see temporary privileges checklist*) by;
   1. complete NPDB query
   2. complete OIG query
   3. copy of the provider's active license on file
   4. complete ALISON verification of license
   5. primary source verification of education
   6. primary source verification of no restriction of privileges
   7. received copy of signed scope of practice
   8. get VP of Clinical Affairs or CMD signature to approve temporary privileges**
 	
HR emails CMD, CD and provider that temporary privileges were approved and effective/term date.

V. Credentialing and Privileging Process
HR begins the credentialing and privileging process (*see credentialing and privileging process*)
VI. HR adds Provider to the FTE Database

February 18, 2013 Monday	
9:00 -11:30	**New Provider Orientation with Sr HR Generalist/Provider Specialists - Plaza Court Conference Room Administration Building** Assist in Completing Forms Benefits Employee Information Medicare/Medicaid Apps Payroll Q&A Social Fund/Direct Deposit Credentialing and Privileging General Overview
11:30-1:00	**E-safety Training – New IT Building Second Floor Conference Room, Lafayette**
1:00-2:00	**Lunch**
2:00-3:00	**Finish Up E-safety Training and/or Travel Time to Provider Site**
3:00-5:00	**CMD presentation—Clinica history, pods, call structure, scope of practice Q&A**
February 19, 2013 Tuesday	
9:00-12:00	**Session 1 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Travel Time to Provider Site**
1:00-2:00	**Meet and Greet Lunch with Clinic Providers (lunch scheduled by Site)**
2:00-3:30	**Site CMD Meeting**
3:30-5:00	**Provider Shadowing and Scribing at Site**
February 20, 2013 Wednesday	
9:00-12:00	**Session 2 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-1:00	**Skype call with Scheduling Specialist. Plaza Court Conference Room Administration Building** Vacation/CME requests Template changes Call structure Call doc meetings, etc.
1:00-2:00	**Lunch**
2:00-3:00	**IT Applications Administrator and/or IT Technical Support Lead (footprints and IT support) - Plaza Court Conference Room Administration Building**
3:00-3:30	**Meet with Development Department – Plaza Court Conference Room Administration Building Lafayette** Where Funding Comes From Who Funding Comes From

	How Funding is Managed/Processed
3:30-4:00	**Meet with VP of HR - Plaza Court Conference Room Administration Building** Leadership Culture Role of HR
4:00-5:00	**CFO, Director of Accounting & Finance, Director of Financial Planning & Analysis, Director of Site Billing and Patient Eligibility - Plaza Court Conference Room Administration Building** Finance Organizational Structure Purpose of Financial Management Tell you about the $$$ How we work together
February 21, 2013 **Thursday**	
9:00-12:00	**Session 3 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Lunch and Travel Time to Provider Site**
2:00-3:00	**Shadow Medical Assistant (MA)**
3:00-4:00	**Meet with Clinic Operations Manager (COM) and or Clinic Operations Technician (COT)** Clinic Tour Key and Key card
3:00-5:00	**Provider Shadowing and Scribing at Site**
February 22, 2013 **Friday**	
9:00-12:00	**Session 4 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-1:30	**Lunch with CEO – Lafayette Local Fare**
1:30-2:00	**Travel Time to Provider Site**
2:00-2:30	**Shadow Office Tech (OT)**
2:00-3:00	**Shadow Nurse Team Manager (NTM)**
3:00-5:00	**Provider Shadowing and Scribing at Site**
February 25, 2013 **Monday**	
9:00-12:00	**Session 5 with EMR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Lunch and Travel Time to Provider Site**
2:00-3:00	**Provider Shadowing and Scribing at Site**
2:00-5:00	**Shadow Behavioral Health Provider (BHP)**
February 26, 2013 **Tuesday**	
9:00-11:00	**Provider Shadowing and Scribing at Site**
11:00-12:00	**Shadow Referral Case Manager (RCM)**
1:00-2:00	**Lunch**

2:00-3:00	**Provider Shadowing and Scribing at Site**
3:00-5:00	**Shadow Case Manager (CM)**
February 27, 2013 **Wednesday**	
9:00-12:00	**Session 6 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Lunch and Travel Time to Pecos Site**
2:00-3:00	**Meet with Pharmacy Manager and Pharmacist – Pecos Site First Floor** Sample Dispensing Review Formulary How to Add Drugs to Formulary Liability for Dispensing From Outlet vs Pharmacy at Pecos Pharmacy Hours What Drugs Are at Lafayette and Thornton Turn Around Time for MAP Medications MAP Process for Non Formulary Rx for MAP not Eligible Medication Outlet Who decides Cost for Medications Who to Contact with Problems Do Not Use Abbreviations Turn Around Time for Rx
3:00-4:00	**Meet with Call Center Manager – Pecos Site First Floor** Green House Office Tech II Pay Codes Medicaid Process
4:00-5:00	**Meet VP of Dental Services – Pecos Dental Clinic**
February 28, 2013 **Thursday**	
9:00-12:00	**Session 7 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Lunch and Travel Time to Provider Site**
2:00-5:00	**Provider Shadowing and Scribing at Site**
March 1, 2013 **Friday**	
9:00-12:00	**Session 8 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Lunch and Travel Time to Provider Site**
2:00-5:00	**Provider Shadowing and Scribing at Site**
March 4, 2013 **Monday**	
9:00-12:00	**Provider Shadowing and Scribing at Site**

12:00-1:00	**Shadow Clinic Nurse**
1:00-2:00	**Lunch**
2:00-5:00	**Provider Shadowing and Scribing at Site**
March 5, 2013 **Tuesday**	
9:00-12:00	**Session 9 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-1:30	**New Provider Debrief Lunch with Sr HR Generalist/Provider Specialist (Lafayette Local Fare)**
1:30-2:00	**Travel Time to Provider Site**
2:00-5:00	**Provider Shadowing and Scribing at Site**
March 6, 2013 **Wednesday**	
9:00-12:00	**Session 10 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Lunch and Travel Time to Provider Site**
*2:00-5:00 START NORMAL SCHEDULE	**See Patients Independently at Provider Site - Confirm with HR that Temp Privileges Have Been Approved (Temp privileging email should have been received from the Credentialign Clerk in HR)**
March 7, 2013 **Thursday**	
9:00-12:00	**Session 11 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-1:00	**Meet with Medical Coding QA Auditor**
1:00-2:00	**Lunch and Travel Time to Provider Site**
2:00-5:00	**Provider Shadowing and Scribing at Site**
March 8, 2013 **Friday**	
9:00-12:00	**Session 12 with EHR Trainer – Administration Building Green Conference Room, Lafayette**
12:00-2:00	**Lunch and Travel Time to Provider Site**
2:00-5:00	**Provider Shadowing and Scribing at Site**
Follow Up Meetings	
Mid April	**Block for lunch review with CMD (site will schedule)**
Mid April	**Meet with EMR Trainer for EHR Follow Up (Trainer will schedule)**
Congratulations you have completed new provider orientation!	

Future Training to be Announced by HR (your supervisor will notify you of the dates/times):
- o **Cultural Competency Training;**
- o **Clinica Basics;**

Additional Meetings for Future Dates:
- o **Meet with Site CMD at 1 month and at 3 months; scheduled by site**

*Please check-in with the Clinic Medical Director and Clinic Operations Director at your sites before you transition to seeing patients on your own. You must have received your Clinica temporary privileges before seeing patients independently. Please discuss procedural privileging with your Clinic Medical Director.