

Employee Onboarding and Orientation Guide

The home care industry faces high turnover rates, workforce shortages, and challenges in maintaining standardized care.

Effective onboarding and orientation not only ensure **regulatory compliance** but also:

- Improve employee retention
- Reduce liability and safety risks
- Enhance employee confidence and competence
- Strengthening the agency's reputation for quality care

In home care, where workers often operate independently in clients' homes, onboarding is essential for preparing staff to deliver safe, competent, and client-centered care.

Components of an Onboarding and Orientation Program

- **Pre-Hire Compliance Checks**
 - Verification of licenses/certifications
 - Background checks and abuse registry clearance
 - Drug screening (per state/agency policy)
 - Health clearance (TB test, immunization record, physical exam)
- **New Hire Orientation Topics**
 - **Agency Overview:** Mission, vision, policies, leadership structure
 - **Client Rights and Ethics:** HIPAA, confidentiality, elder rights, abuse/neglect reporting
 - **Workplace Safety:** Incident reporting

- **Infection Control:** PPE, hand hygiene, exposure protocols
 - **Emergency Procedures:** Fire safety, natural disaster response, medical emergencies
 - **Job Duties and Scope:** Review of specific caregiver roles and state regulations
 - **Documentation Standards:** Care log
 - **Communication Skills:** including cultural sensitivity, family engagement
- **Competency Evaluation**
- *Written tests (infection control, HIPAA, safety)*
 - *Skills checklists (transfers, ADL support)*
 - *Documentation of competency placed in HR files*
- **Ongoing Support**
- *Mentorship or buddy system for first 30–90 days*
 - *Regular check-ins with supervisors*
 - *Access to wellness and resilience resources*

Sample (Employee Onboarding and Orientation Toolkit)

A. Pre-Employment Checklist

- ☐ Background check completed
- ☐ License/credential verified
- ☐ Health clearance (TB test, immunizations, physical)
- ☐ Reference check documented
- ☐ Signed job description

B. Orientation Curriculum (First Week)

1. *Welcome and introduction to agency mission/values*
2. *Review of agency handbook and policies*
3. *HIPAA and client rights training*
4. *Infection prevention (CDC guidelines)*
5. *Workplace safety and injury reporting*
6. *Cultural competence and communication*
7. *Documentation and Home Care Management app training*
8. *Emergency preparation procedures*

C. Skills and Competency Checklist

- Hand hygiene and PPE use
- Taking vital signs correctly
- Safe transfer and mobility techniques
- Medication reminders (per role scope)
- Wound observation and reporting
- Documentation of care tasks

D. 30-60-90 Day Review Milestones

- **Day 30:** Supervisor check-in, performance review, feedback collection
- **Day 60:** Competency re-assessment, case review, reinforcement training

- **Day 90:** Final onboarding review, permanent employee status confirmed

E. Documentation Requirements

- ☐ Orientation sign-in sheets
- ☐ Skills checklist completed and signed by supervisor
- ☐ Employee acknowledgement of policies and handbook
- ☐ Competency testing results filed in personnel record

Implementation Tips for Agencies

- **Assign a compliance officer or HR manager** to oversee onboarding documentation.
- **Customize templates** to reflect state-specific caregiver training requirements.
- **Incorporate digital solutions:** Use online training modules with automatic tracking.
- **Encourage feedback:** Use post-orientation surveys to refine the process.
- **Promote retention:** Pair onboarding with mentorship programs and recognition initiatives.