



Training Agenda

Italicized font is notes to be considered as you develop your training agenda. Be sure to delete from final copy for your team member.

Prior to considering this Training Agenda complete you need to review the Training Sign Off and ensure every item has a scheduled time. We found it easiest to highlight as we went along in the creation of the Training Agenda.

If you catch yourself saying "I don't have time to do this", remind yourself that you do not have time NOT TO! This process is the key to retaining your new team member.

Our goal is to follow this agenda throughout your training period. It is very possible, as a part of being a 24/7 home care company that we will need to pivot to meet the needs of our clients and caregivers. When this happens we will be sure to shift and account for that time missed at a later date on the agenda. In short, this is a working and evolving document to ensure you are fully trained and supported during your first few weeks with our organization.

Day 1

9am - 12pm - *Time with Owner or Operational Leader*

- Welcome
 - *Welcome Gift Provided*
- Tour of the Workplace
 - *Introduce to their desk/office and ensure it presents nicely.*
- Introduction to the Company- *Reiterate the company's history, mission and the role this individual plays in accomplishing this goal.*
- Orientation to Administrative Policies & Procedures
- Training Agenda Review-
 - *for individuals who were not caregivers they will need to be scheduled for your caregiver orientation and training.*
 - *Cast the vision for their first 90 days of employment*

12pm - 1pm

- Lunch with Owner *If owner is an absent owner, lunch with the operational leader.*

1pm - 3pm

- Email Set Up and Management Expectations
 - Signature Set Up
- Voicemail Set Up and Management Expectations
- Company Property Overview and Expectations

Interested in learning more about our services or have further questions?

We are here to help you find the solutions that best fit your needs. <https://eiandcompany.com/>

Disclaimer: Please note that these are recommendations and should not be substituted for legal advice. In addition, please remember you are ultimately responsible for how you operate your business.



24/7 SOLUTION TIME

- HIPAA Compliance and Confidentiality - how to maintain confidentiality as an administrative team member. *Expectations you have about what documents are shredded, emails that are sent out, how to use VPNs, etc.*

3pm - 5pm

- General Operations Training - *Divide and conquer. Utilize your team to help in this training as a way to build relationships amongst team members and to give space to yourself/their direct supervisor to accomplish other tasks within the business.*
 - *Refer to the Training Sign Off and title the training topics to match items that can be trained by any team member. For example this section may say:*
 - *3pm-4pm - Phone Management - Training conducted by Susie Smith, HR Coordinator*
 - *4pm-5pm - Introducing new caregivers to clients - Training conducted by Tara Jones, Quality Assurance Manager*

Day 2

Continue with the plan above where you divide and conquer with your team and schedule times based on your availability so if you have a meeting unrelated to your trainee from 3p-5p that day, make sure you scheduled that individual to shadow someone else to learn a General Operations matter or for observation of their role. Below is a sample of a Scheduling role in your organization:

9a-11a

- Learn software *If there are e-courses available by the software program, allow them to work independently on this.*

11a-2p *Allow for a lunch break*

- Review what was learned in the software training and begin practicing, pull from the Training Sign Off for items like:
 - Accessing a caregiver profile.
 - Accessing a client profile.
 - Creating a one time shift.
 - Creating an ongoing schedule.
 - Understanding the dashboard.

2p-5p

- Shadow Human Resource Department and be sure to observe/learn about the following:
 - Phone Screens/Interviews
 - Interview

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- Job Offer Process
- Training Process
- Ways your role works closely with the HR Department.

Day 3

You would continue to cast out the vision for their first 30 calendar days on the team. It is possible you only need 10 business days (roughly 14 calendar days). You need to ensure the agenda wraps up with a Training Sign Off meeting with the supervisor, owner/operational leader, and new team member by the 30th calendar day (roughly Day 20), example below:

Keep in mind - if it takes longer than 30 days that is either a reflection of your leadership and organization of their training period and following through on the commitments in the agenda or the individual is not a good match for the position.

Day 20

9a-3p *At this point the individual is likely a pro and there are many days filled with "Independent Work Time" which would mean they are already signed off and executing daily on many of the tasks in the Training Sign off.*

- Independent Work Time

3p-4p

- Training Sign Off Meeting with Supervisor, Owner/Operational Leader

4p-4:15p

- Certificate of Completion Awarded

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