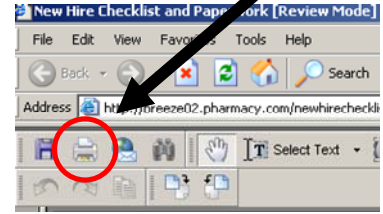


To print this document:

- Click the **Adobe** print icon  – contained within the **Adobe** toolbar.



Instructions: The checklist includes *guidelines* and NOT directives for Area Manager Orientation. It is not required to go in order of the checklist. If there is a need to change the sequence, please do so, however, all items must be completed on this list.

Day 2 and 3 with RM or designated coach

Educational Focus	Description	RM Initial
<p>Access to the Home Page. As many of these documents and information included within this Orientation are found on the Home Page, someone will need to provide daily access to the Home Page for the new employee. Once the new employee receives their email address, they can then access the Home Page using their own email address and password.</p>		
<p>REVIEW MATERIALS</p>		
<p>A. Morning Meetings</p>	<p>Review Morning Meeting Policy 1.1.25. http://static.pharmacy.com/policies_procedures/chapter1/1.1/1.1.25.pdf</p> <p>Review Location's Morning Meeting forms:</p> <p>CL 307 Initial Plan of Care http://static.pharmacy.com/formsanddocs/clinical/CL307.pdf</p> <p>CL 309 Ongoing Plan of Care http://static.pharmacy.com/formsanddocs/clinical/CL309.doc</p> <p>OP 505 Morning Meeting Log http://static.pharmacy.com/formsanddocs/operations/OP505.pdf</p> <p>OP 543 Morning Meeting Attendance Sheet http://static.pharmacy.com/formsanddocs/operations/OP543.pdf</p> <p>OP 544 Oxygen Qualification Log http://static.pharmacy.com/formsanddocs/operations/OP544.pdf</p> <p>OP 552 Process Check PulmoDose Notes http://static.pharmacy.com/formsanddocs/operations/OP552.pdf</p> <p>SL 424 Patient Set-up Tracking Log http://static.pharmacy.com/formsanddocs/sales/SL424.xls</p> <p>Review materials required for Morning Meetings:</p> <ul style="list-style-type: none"> LCM: Morning meeting binder, MOTW, Oxygen Qualification log (OP 544), emails from Operations and Clinical departments. CSR: Referral log, Pulmo-Dose online notes, and Oxygen Pickup form. PST: Route Sheet, PDL, and Delivery/Service/Pickup tickets 	

Educational Focus	Description	RM Initial
	<p>from previous day.</p> <ul style="list-style-type: none"> ▪ RC: GOLD Clinical Considerations, Patient Care Plan Binder with Ongoing Plans of Care (CL 309), Route Sheet and Delivery/Service/Pickup tickets from previous day, Infection Control Binder and Sleep Central Clinic dates. ▪ Sales Rep: GOLD conversions, and Sales activity review (referral sources, doctor and patient updates and follow-ups). ▪ Paper storage: The LCM or designated employee will place the Morning Meeting Log in the Morning Meeting Log Binder upon completion of the morning meeting. ▪ Log: The Morning Meeting Log will be maintained in the Morning Meeting Binder. The binder will contain 1 month of meeting logs. Logs must be purged monthly to storage, after ensuring resolution of all issues. 	
B. Budget vs. Actual Review	<p>Area specific; review the Area and Location BvA reports.</p> <p>Review automated IMBS reports, including:</p> <ul style="list-style-type: none"> • Delivery / Pick- up Report • Area Snapshot • Location Snapshot • Product Comparison Report 	
C. Held Items Aging (HIA)	<p>Review the Held Item Aging: Location Procedures Policy 2.10.1. http://static.pharmacy.com/policies_procedures/chapter2/2.10/2.10.1.pdf</p> <p>Also demonstrate how to work the Held Item Aging along with IMBS (i.e. collection notes and patient account information.)</p>	
D. Service Area – Routing, MapPoint	<p>Area specific; review Routing & PDL materials from LCM Training Academy. Review Geographic Routing Policy 2.12.1. http://static.pharmacy.com/policies_procedures/chapter2/2.12/2.12.1.pdf</p> <p>Emphasize on planned recurring routes at each Location, and service planned through use of the Delivery Frequency Calendar.</p>	
E. Patient Delivery Logs	<p>Review Routing & PDL materials from LCM Training Academy. Review Patient Delivery Logs Policy 2.12.3. http://static.pharmacy.com/policies_procedures/chapter2/2.12/2.12.3.pdf</p> <p>Emphasize the benefit of using PDLs to flag/trigger for performing recurring work.</p>	
F. No Charge	<p>On the Dashboard, review the following.</p> <p>Note: the Dashboard will be reviewed in more detail in an item listed below – under Review Applications.</p> <ul style="list-style-type: none"> • Review No Charge and Pending Testing List; • Outline the qualifying process • Include patients that have a code 1-5, 7 which need testing • Display the remaining codes – which are insurance issues, back up equipment, etc.... 	
G. Commission Plan	<p>Review Commission Plan</p> <p>Review the Sales Commission Reconciliation Policy 4.11 and the</p>	

Educational Focus	Description	RM Initial
	reconciliation process	
H. Sales Rep Points Expectations	<p>Discuss Sales Rep Points Expectations document http://breeze02.pharmacy.com/srexpectations</p> <p>Review the Sales Rep Performance Improvement Report – Form HR 525. http://static.pharmacy.com/formsanddocs/humanresources/HR525.pdf</p> <p>Discuss Sales Commission Web Reports and Point Research, including the following emails:</p> <ul style="list-style-type: none"> • code1@rotech.com • code8@rotech.com • house.account@rotech.com • salespoints@rotech.com 	
I. Consignment Closets	Review the Consignment Closet process	
J. Sample Program	Review the Sample Program, DuoNeb sheets and ordering bags, and the process for ordering and tracking	
K. Revenue by Physician	Review Revenue by Physician Report. It is ordered by emailing your BCD with the time period specified and DVP approval.	
L. SR Ride Along Field Day	<p>Discuss SR Ride Alongs and Field Summary Report http://static.pharmacy.com/formsanddocs/sales/SL436.pdf</p>	
M. Back to Basics - HME	<p>Discuss information on Back to Basics. We recommend printing this document and viewing it later. http://breeze02.pharmacy.com/btbhme/</p>	
N. Patient Set Up and Recurring Service	Review the Patient Set Up and Recurring Service Posters. Discuss the Locations' set up and pick up processes to see what kind of referrals the location is getting for the month. Review the Locations' Neb Meds and Oxygen counts.	
O. Patient Set Up Tracking Log (SL 424)	<p>RM discusses Patient Set Up Tracking Log and 48 hour follow up tracking. This discussion is to supplement the <i>Basic Ops</i> Breeze displayed below and the CSR Log discussion on Days 4-5 with the CSR. http://static.pharmacy.com/formsanddocs/sales/SL424.pdf</p>	
P. Billing Center	Discuss the Billing Center process/forms and Location follow up. Also go over CMN batching.	
Q. QA Batch Sheets	Review the process of QA'ing the CSR's batch sheets.	
R. Manager Self Service (MSS)	<p>Review the process of entering information into Manager Self-Service (MSS.)</p> <p>Review and print the Manager's Welcome letter found on the Home Page – under Human Resources, Human Resources, Manager Self Service, Manager's Welcome. http://static.pharmacy.com/formsanddocs/humanresources/HR766.pdf</p>	

Educational Focus	Description	RM Initial
	<p>The User Guide can be used as a reference. It can be found on the Home Page – under Human Resources, Human Resources, Manager Self Service, User Guide. http://static.pharmacy.com/hr/HR765.pdf</p> <p>Review job aids for:</p> <ul style="list-style-type: none"> • Processing a requisition. Includes steps to processing a job requisition. Only managers have rights to this document. http://breeze02.pharmacy.com/processingreg • Employee Separation. Includes instructions to follow when terminating an employee in MSS. Only managers have rights to this document. http://breeze02.pharmacy.com/msstermination/ 	
S. LCM & Sales Rep Weekly Meeting Agenda	<p>Discuss information on LCM & Sales Rep Weekly Meeting Agenda. http://breeze02.pharmacy.com/saleagenda/</p>	
T. Overview of Equipment and Services	<p>If the AM is new to Rotech, the RM should designate a seasoned LCM to discuss the following – <i>after</i> the AM reviews the 11 minute Breeze on Overview of Equipment and Services – listed below.</p> <p>Review Oxygen Systems:</p> <ul style="list-style-type: none"> • Concentrator • Liquid • High Pressure • Conserving Devices • Portable Systems <p>Also review DME:</p> <ul style="list-style-type: none"> • Commodes • Canes & Crutches • Walkers • Lift Chairs • Power Operated Vehicles – Scooters • Power Wheelchairs • Hospital Beds • Trapeze Bars • Group 1 Support Surfaces • Group 2 Support Surfaces • Patient Lift • Suction Pumps • Manual Wheelchairs – standard, ltwt., hemi, hvy dty, ELRs, etc.. • Wheelchair Accessories 	
U. Joint Commission Training	<p>This presentation is intended to be reviewed by the AM and RM <i>together</i> – as it does NOT have audio. This presentation will be provided later in the classroom setting. http://breeze02.pharmacy.com/icahoho</p>	

Educational Focus	Description	RM Initial
REVIEW APPLICATIONS		
V. Sales Commission Web	General discussion of the Sales Commission Web and the Point process. A detailed guide on how to use the Sales Commission Web, IMBS, and tracking points is included in the Breeze Training "How To Track A Point" offered on Day 9.	
W. Gold Care Grid	General discussion of the Gold Care Grid. A detailed discussion is designated for Days 7 – 8 with the RCS or designated coach. Review GOLD Care Approvals Tracking Grid and the GOLD Care Roll-up Report If applicable, review the SR/RC GOLD Care Pending Tracking Report	
X. Fleet	Review the entire Fleet section of the Home Page under Operations, Fleet with an emphasis on GE reports, vehicle ordering, maintenance, and terminations.	
Y. Real Estate	General discussion of function with RM. Review policy 2.8.1 http://static.pharmacy.com/policies_procedures/chapter2/2.8/2.8.1.pdf	
Z. Forecaster	Review Forecaster application on Home Page, under Operations. Emphasize correlation of information with DAD and CAD.	
AA. After Hours Call Scheduler	Discuss After Hours Call Center, including its role and when to access Add to After Hours Scheduler – on the Home Page under Operations, After Hrs Call Center. Also: <ul style="list-style-type: none"> ▪ Update Contact List – from the Home Page, Contact Lists, Update Your Info. ▪ Review the AHCC module from the LCM Training Academy. ▪ Review the Daily Reports and Custom Reports, including: <ul style="list-style-type: none"> ▪ After-hour call reason ▪ Calls vs. Dispatches ▪ Number of After-hours Supply / Oxygen Deliveries required ▪ Total number of calls vs. dropped calls 	
BB. Driver Activity Database (DAD)	Review the Driver Activity Database (DAD). If necessary, use the Step by Step Instructions . http://static.pharmacy.com/operations/DAD_V2/instructions/DAD_InstructionsV1.pdf	
CC. Clinical Activity Database (CAD)	Review the Clinical Activity Database (CAD). If necessary, use the Step by Step Instructions . http://static.pharmacy.com/operations/CAD_V2/instructions/CAD_Instruct.pdf Address the following: <ul style="list-style-type: none"> • Key areas of focus and how to analyze the data • Rotech Clinician Expectations 	
DD. Dashboard	Demonstrate the following items on the Dashboard: <ul style="list-style-type: none"> • Open tickets • HIA – including how to sort • Asset Tracking – including shipments not received in bConnect 	

Educational Focus	Description	RM Initial
	<ul style="list-style-type: none"> • Include any location specific recommendations • See Dashboard User Guide. http://static.pharmacy.com/formsanddocs/operations/OP200.pdf 	
EE. Management Reports	Review the following reports: <ul style="list-style-type: none"> • BvA – as discussed above • CAD/DAD reports – for each PST and RC • Detailed delivery/pick up rental reports • Drill down • HIA – as discussed above • Month end reports • PIM reports 	
FF. Inventory Management	Discuss Month or Quarter End Physical Inventory Count and how to log into the Inventory Collection System.	
GG. Kronos / Workforce Timekeeper	Review and print the following documents which can also be found on the Home Page – under Rotech U, HR / Payroll. <ul style="list-style-type: none"> • Kronos Salaried Employee Training http://static.pharmacy.com/hr/pdf/KronosSalaryTraining.pdf • Review Kronos Frequently Asked Questions http://static.pharmacy.com/hr/pdf/KronosFAQs031205.pdf Print the following documents to be used as a reference. These documents contain information on using Kronos and can be found on the Home Page – under Training by Department / Area, HR / Payroll, Management. <ul style="list-style-type: none"> • Kronos Quick Reference Guide http://static.pharmacy.com/hr/pdf/quickreference.pdf • Kronos Reports, Overtime http://static.pharmacy.com/hr/pdf/KronosReportingInstructions.pdf • Kronos Time Detail Audit Instructions http://breeze02.pharmacy.com/kronosaudit/ • Kronos User Guide http://static.pharmacy.com/hr/pdf/userguide.pdf 	

ONLINE TRAINING

Important! If the AM does not have a Rotech email account, they can log in using the AM Guest account. If assessments are available, it is important the AM does NOT take the assessments under the Guest account. Assessments should be left for when the AM has his/her own email.

Login: use the AM Guest account of amtraining@rotech.com.

Password: the RM will provide the AM Guest account password; if you are an RM and need the login information, click the link below.

For RMs only: <http://breeze02.pharmacy.com/guestrm>

Time constraints. If there are time constraints with today's content, the AM can take the following Breezes another day – but before the ninth (9th) day of Orientation. On the ninth (9th) day, the AM is required to take assessments on these training modules. The following five (5) training modules can be taken in 1 hour and 16 minutes.

Educational Focus	Description	RM Initial
<p>Note: once the AM receives an email address, they can access Breeze training with their own email – the day AFTER the email was provided. Specifically, Breeze is updated with new user information the day AFTER an email was created.</p> <p>Important! Remember the AM is not to click on any links for assessments. Assessments will be taken by the AM on the 9th day of Orientation.</p>		
W. AM Role	The RM can cover this information from this handout. http://breeze02.pharmacy.com/amorole	AM Initial
X. Overview of Equipment and Services	This is an <i>11 minute</i> Breeze and can be completed online by the AM. http://breeze02.pharmacy.com/csr04/	AM Initial
Y. The Rotech Way	This is a <i>17 minute</i> Breeze and can be completed online by the AM. http://breeze02.pharmacy.com/csr01/	AM Initial
Z. Basic Ops	This is a <i>16 minute</i> Breeze and can be completed online by the AM. http://breeze02.pharmacy.com/csr05/	AM Initial
AA. Completing a CMN	This is a <i>20 minute</i> Breeze and can be completed online by the AM. http://breeze02.pharmacy.com/csr13/	AM Initial
BB. SOPs – General & Specific	This is a <i>12 minute</i> Breeze and can be completed online by the AM. http://breeze02.pharmacy.com/csr14/	AM Initial

We have fully completed the new employee education session on the items listed above.

AM signature: _____ Date: _____

RM (coach) signature: _____ Date: _____