

# Help Me Grow New Team Member Checklist – Care coordinator

EMPLOYEE INFORMATION		
Name:	Start date:	
Position: HMG Care Coordinator	Manager: Deborah Weiss	
JOB ASSIGNMENTS		
<input type="checkbox"/> Care coordination <input type="checkbox"/> ASQ online <input type="checkbox"/> Knowledge of child development <input type="checkbox"/> Weekly case review meeting <input type="checkbox"/> Special projects		
FIRST DAY		
<input type="checkbox"/> Provide employee with new “Employee Handbook” <input type="checkbox"/> Create training schedule		
POLICIES		
<input type="checkbox"/> Review new employee handbook	<ul style="list-style-type: none"> <li>• Anti-harassment</li> <li>• Vacation and sick leave</li> <li>• FMLA/leaves of absence</li> <li>• Personal conduct standards</li> <li>• Performance reviews</li> <li>• Progressive disciplinary actions</li> <li>• Dress code</li> </ul>	<ul style="list-style-type: none"> <li>• Confidentiality</li> <li>• Safety/Emergency procedures</li> <li>• Visitors</li> <li>• Office Jobs (Kitchen, empty trash)</li> <li>• Mileage/Expense reports</li> </ul>
ADMINISTRATIVE PROCEDURES		
<input type="checkbox"/> Review general administrative procedures	<ul style="list-style-type: none"> <li>• Office/desk/work station</li> <li>• Key Fob/Door Code</li> <li>• Mail (incoming and outgoing)</li> <li>• Computer set up</li> <li>• Telephones (211/UW/HMG Calls)</li> <li>• Scanning/Faxing/Cover Sheet</li> </ul>	<ul style="list-style-type: none"> <li>• Location of HMG Supplies</li> <li>• Office supplies</li> <li>• Conference rooms</li> <li>• Business cards</li> <li>• Computer files</li> </ul>
ONE MONTH REVIEW		
<input type="checkbox"/> Review of policies and procedures – will be asked to restate all policies prompted by topic. <ul style="list-style-type: none"> <li>• Review of above</li> <li>• Parking, traditions, reimbursements, holidays, desk space, etc.</li> </ul>		
INTRODUCTIONS AND TOURS		
<input type="checkbox"/> Give introductions to department staff and key personnel during tour.		
<input type="checkbox"/> Tour of facility, including:	<ul style="list-style-type: none"> <li>• Restrooms</li> <li>• Mail room</li> <li>• Supply Room</li> </ul>	<ul style="list-style-type: none"> <li>• Parking</li> <li>• Break Room</li> <li>• Emergency exits and supplies</li> </ul>
POSITION INFORMATION		
<input type="checkbox"/> Review initial job assignments and training plans <input type="checkbox"/> Review job vision, description and performance expectations and standards		

- Review job schedule and hours
- Review payroll timing, time cards

### OFFICE/COMPUTER SET UP

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|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Email Signature</li> <li><input type="checkbox"/> HMG Files/Saving files/titles of files</li> <li><input type="checkbox"/> "read only" documents</li> <li><input type="checkbox"/> Outlook Organization/Calendars</li> <li><input type="checkbox"/> Scheduling meetings/events</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Short Cuts</li> <li><input type="checkbox"/> Checking HMG Intern email</li> <li><input type="checkbox"/> Hardware and software reviews, including           <ul style="list-style-type: none"> <li>• Microsoft Office System</li> <li>• Data on shared drives</li> <li>• Databases</li> <li>• Internet Usage/browsers</li> </ul> </li> </ul> |
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### TRAINING PERIOD (2-3 months)

- Email update on daily accomplishments to Deb.
- Keep calendar up to date with projects planned.

### TEAM PARTICIPATION

- Prepare for team meetings by reviewing personal assignments.
- Bring any materials needed to show team.
- Give reports on projects as needed.
- Seek feedback from team on projects
- Email update on daily accomplishments (during training period) to Deb.

### CARE COORDINATION OVERSIGHT

- Print weekly "To-Do" reports
- Phone Coverage Chart
- Monitor all HMG Staff's case load and assign and equally distribute new families
- Periodically check family record of other CCs/Interns to verify accuracy
- Troubleshoot complicated calls and train (remind) team on correct policy
- Guidance to liaisons/staff on needed resources
- Assist in Family Database/Clinic Database maintenance and improvements
- ASQ Online Intern & ASQ Intern - Who is assigned

### YOUR CARE COORDINATION

- Transfer families to your name
- Intake of HMG/211/UW Calls
- Proper Phone Etiquette
- Adding a new family to HMG Database
- Basic questions to ask a new family
- Welcome Letter/Protective Factors Survey
- ASQ Monitoring (sending/follow up with families/online ASQ , Gray/Black ASQ Policies)
- Researching new resources
- Relaying Resources to Families

- Recording referrals made in HMG Database
- Scanning/Faxing to doctor
- Opening/Closing Files
- Leave unchecked boxes
- All care coordination is to be completed each week
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### **ASQ ONLINE**

- ASQ Online: maintenance, training, improvements, usage
- How to add/change usernames (especially for new interns)
- ASQ Online (and how to Accept/Reject new ASQs)
- ASQ Online Intern & ASQ Intern – Who is assigned

### **KNOWLEDGE OF CHILD DEVELOPMENT**

- Read ASQ3 manual, administer and score, watch DVD of ASQ3.
- Know the research behind the Protective Factors
- Creating/revising training materials and schedules for interns and staff specific to care coordination
- Read through TouchPoints volumes 1 and 2 within the first year of employment.
- Save any new (reliable) information sheets to References and Resources folder

### **INTERN TRAINING**

- Prepare new semester intern schedules
- Prepare materials for New Intern Orientation
- Improve personal training skills and techniques each new semester.
- Oversee the updating of the Intern Manual with new policies.
- Train interns on Care Coordination Procedures
- Mid-point Review of Families with interns

### **CASE REVIEW MEETING**

- Schedule weekly training (Robin 1/month, Laura 1/month, you 2/month)
- Update Case Review portion of the weekly agenda
- Lead meeting. (Keep conversation flowing and on schedule. End on time.)
- Record discussion and email post meeting updates or assignment reminders as needed.

### **MISC PROJECTS**

- Whenever given a new project, review plans to accomplish project with Deb and/or team.
- Become familiar with the National website: [www.helpmegrownational.org](http://www.helpmegrownational.org)
- Welcome Baby Evaluations
- Sub For Santa Families – Follow up – email and/or send postcards
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