





# Sterile Processing Onboarding 101:

## How Technicians Benefit from Focused Training, Assessment

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### LEARNING OBJECTIVES

1. Discuss the hiring process and its relationship to onboarding
2. Review the onboarding process for new technicians
3. Examine the documentation that should be included with the onboarding process

**E**mployee onboarding plays a significant role in how Sterile Processing (SP) technicians perceive their roles and understand the expectations for the position. Employee onboarding is not only necessary for new and inexperienced technicians; it is also valuable for SP leaders, traveling technicians, and seasoned professionals who have recently changed positions. Onboarding is among the most vital processes for determining employees' capabilities and how well they will perform within their healthcare facilities.

The onboarding experience sets the stage, mood and atmosphere for what employees' roles should entail and the responsibilities they will need to perform within the department. Preceptors (also known as instructors or trainers) help prepare students throughout the year for tests that will help demonstrate not only the

students' knowledge but how well the instructor performed in the training. Many people assume that if a student fails, it is because they did not study adequately throughout the year; the test, however, also helps identify gaps in the information presented by the instructor, which may have contributed to the student's inability to respond correctly. To ensure fairness when testing new technicians' capabilities, it is important that the employees are provided with the necessary tools, resources, information and answers during the onboarding process. This will help ensure they are prepared when they are sent to perform the actual work in the department.

This lesson reviews critical aspects of the onboarding process. It aims to help technicians better understand its importance and how effective, focused onboarding benefits new employees, the Sterile Processing department (SPD) and the facility.



### **Objective 1: Discuss the hiring process and its relationship to onboarding**

Onboarding begins with the hiring process. Human Resources (HR) should not be expected to be responsible for the entire process, the SP staff should take responsibility for determining which of the candidates will best fit the department's culture. The following questions will help prepare the department staff for the hiring and onboarding processes.

- Who in the department will be responsible for interviewing?
- What does the interview process look like? Who is involved?
- Who is responsible for greeting the new hire once the offer is accepted?
- Who is responsible for following up with the new hire to provide instructions on first-day events?
- What do the first days of employment look like?
- Who will train the new hire for the first 90 days?
- What will the new hire do for the first 90 days?
- Who will follow up with the new hire throughout the first 90 days?
- What does the 30- to 90-day review look like?
- Do new hires and preceptors have a way to provide feedback on their experience? If so, what is done with that information?
- How will opportunities for improvement be addressed with new employees?

It takes significant effort to hire someone and onboard employees. HR departments understand how onboarding helps introduce new and prospective employees to the organization and the world of SP. The interviewing process should be streamlined by HR to allow interviewers to ask questions that

identify the skills required for each technician. Departmental leaders should have a list of expectations, and this may look different from each hospital or department. Leaders should be specific in what they are looking for in employees, such as the need for seasoned technicians who know the ins and outs of the department and equipment, and also the need for technicians with positive attitudes and an eagerness to learn. Once the SP leader determines the best qualities for prospective employees, that information is shared with all who will participate in the interview, and the group then establishes the appropriate targeted questions. If the expectation is for someone who has a sense of urgency and great work ethic, for example, then it could be helpful to ask questions such as, "Tell me about a time you had to manage multiple tasks. How did you prioritize?" or "What does work ethic mean to you?" Interviewees should also be told important details about the department's operations. A statement such as, "Our staff members rotate weekends and are expected to be resourceful when dealing with difficult situations," would help set employee expectations.

Even the very best departments are works in progress, so all new employees should be included in key discussions and asked to contribute to possible solutions. Ultimately, there are two goals in the interview process: looking for the best person who meets the department's needs and attempting to determine whether technicians are up to the challenges of the SPD (not every new hire will be a suitable fit).

### **Objective 2: Review the onboarding process for new technicians**

Once a new SP staff member has been hired, it is time for them to get to work. All new employees should

receive onboarding and training from knowledgeable SP professionals, which may include SP leadership, preceptors or an experienced technician.

Once the orientation date is set and new hires are scheduled for their first day, they should receive the following:

- An email greeting congratulating them on joining the SP team.
- A phone call or voice message that informs them to check their email for further instructions and details on what to expect in HR and SP orientation (these are often two separate events). They should also be provided (either via telephone or email) details about time of arrival, phone numbers, and what to do in case they become lost or run late.
- A walk-through of each area of the department and the many processes involved in each area.

A new employee's first day typically begins with a hospital-wide orientation. Often, at the end of that first day, new employees may feel overwhelmed or confused; a well-planned and well-delivered orientation should help new employees become comfortable and acclimated more quickly. New hires should be able to meet with their leaders or educators after the first day of orientation (and every day thereafter) to answer any questions. The first or second day of orientation may include a review of onboarding paperwork to be completed (such as training documents often requested by auditing agencies). This initial phase of the onboarding process takes about two to three days and allows employees to learn more about expectations and receive the resources they need when they are officially working in the various areas of the department. The following items should be addressed or conducted during orientation:



- A review of internal policies and procedures and where to locate them (i.e., how to request time off or information about point-of-use treatment and loaned instruments)
- Locations of agency standards and guidelines
- Facility-wide online modules and required training (this is typically completed within the first two to three days of orientation)
- Facility orientation packet (e.g., fire extinguisher use, crash cart locations, facility emergency activation). This is typically completed within the first two to three days of onboarding.
- Review and check-off of the SP orientation packet (e.g., Decontamination, preparation and packaging and sterilization/HLD process check-offs). The educator/preceptor will typically review this within 90 days of the employee's hiring.
- Tour of the department (including break rooms, cafeteria, locker room) and other departments and areas of the facility (e.g., Operating Room, nursing units, preceptor office, gift shop, chapel). During the tour, employees should be taught how to use the orientation packet and new hires should complete a process and signoff with a preceptor for each taught task. This is often agency requested; documentation can be collected using an electronic tracking system or paper version. Auditing agencies will often request these documents from managers or the HR department to check employee onboarding and continuing education.
- Meeting with the SP manager to discuss expectations, answer questions and exchange contact information.

Preceptors should be involved in new employee training across all areas of the department. A single preceptor can

oversee the new technician's progress and still have multiple other trainers going over individual processes, such as endoscope reprocessing or decontamination to ensure consistency with results. The primary preceptor or educator should meet with the new technician every week (preferably) to ensure progress is being made. Each time a meeting takes place, the preceptor may ask these questions:

- To the trainer: "How is the new employee doing in your area?"
- To the new employee: "How are you feeling about this process?" and "How are you doing with your trainer?" and "Do you have any questions?"

If these questions are asked each week, it will be possible for preceptors to determine training gaps that should be addressed. For example, a trainer may suggest providing one more week on endoscope reprocessing, or a new technician may suggest that the trainer is not providing detailed enough information. This helps the preceptor or educator provide more new employees with more appropriate resources, such as extra time or a new trainer to ensure all areas of the orientation packet or check-off forms are completed in a timely manner. The preceptor may also add information to the new technician's orientation documents for later use during the employee's performance review.

### **Objective 3: Examine the documentation that should be included with the onboarding process**

New technicians may wonder what will be included in their orientation and onboarding documents. There are a variety of templates and suggested documents, but the content also depends upon the organization that

audits the facility (each may have slightly different approaches on what they like to see and what is important to the overall function of the department). Many times, auditors' questions will reflect what was reviewed and documented during the hiring process.

The onboarding process should provide sufficient information to produce a competent technician in all areas of the department. Continuing education is another area of important focus, and the orientation documents should detail how employees can stay current with new trends, technologies, standards, regulations and processes. SP technicians also need proof that training took place for each area of the department where they will work. A simple check-off form with the criteria an SP leader or preceptor needs to validate for new hires (along with the method of validation) may be created and used for orientation. For example, proper loading of a washer-disinfector may be a process to validate in new employee training. Technicians should expect their trainers to demonstrate the process and address any departmental policies surrounding it. From there, the new employee should perform the same process (return demonstration). If the new hire is successful in repeating the process, the trainer can check off or validate that the employee is competent in performing that process. The facility's education team can also provide resources and insight into the process, including how often training should occur and in what format (hands-on demonstration, video, inservice, etc.).

After the new employee has completed each onboarding phase, a formal review is typically scheduled to provide preceptors and managers with a view into the new employee's progress. *This is perhaps the most important part of onboarding.* Formal reviews with



management should occur about five or six weeks after the new technician's start date; this provides trainers with another effective method for assessing employees' knowledge and competency, while also allowing new employees to address any concerns they may have. The following should happen prior to this formal meeting/review:

- The new employee, preceptor(s) and manager should receive a mailed invite.
- The meeting should be scheduled outside the department, such as a conference room (setting the scene for a more formal meeting)
- The new employee should receive a reminder of documentation (or check-offs) that are due or will be reviewed at the meeting.
- Information should be collected regarding productivity or areas in need of improvement and any notable reports from preceptors that need to be addressed.
- Preceptor and new employee feedback should be collected.

The primary goal of the new-hire formal review is to carefully assess what the new employee has been doing in the first month or so. Pending documents should be collected and will allow preceptors and new employees to review any missing information that was not addressed during initial training. Sometimes, due to time constraints, new employees may not be able to run tests since they are completed overnight. The new employee and preceptor should meet to allow for additional training, even if the new employee has several years of experience and can describe the process. All new employees should receive the same training and attention, regardless of their background and experience.

Using feedback tools during employee orientation is optional, but highly

recommended. Managers and educators cannot be always in all locations, so feedback tools/surveys offer the next best way to ensure proper training is occurring. Prior to the new hire review, a survey/feedback tool may be provided to the new hires and preceptors; this is completed to show which areas of training are working well and which areas could be improved. Without feedback tools, some preventable issues or problems may be overlooked and rear their heads later. For example, a new hire may believe that they are doing extremely well in all areas, but the survey from one preceptor might suggest one more week is needed in endoscope reprocessing. A quick assessment from the educator may determine that the new employee can in fact reprocess endoscopes, but that they did not fully understand the preceptor's content or method of communicating the information during training. In that case, the preceptor could be moved to a different area of training. If the feedback tools address areas of opportunities for the new hire, that presents an opportunity for new employees, preceptors and managers to work together to ensure the employee has the knowledge and training needed to perform their roles. When such a situation arises, extra time and resources may need to be allocated to the employee, the preceptor and the training.

### Conclusion

Employee onboarding is vital for setting expectations and ensuring that SP technicians have the tools, training and support they need to succeed in their new roles. All new hires, regardless of their previous experience, should receive the same type of training to ensure that practices and processes are performed safely, effectively and consistently.

It is normal for new technicians to feel anxious about their new roles, but a well-developed and well-implemented onboarding experience will help them navigate the process and gain confidence in their abilities and departmental contributions. If questions arise, it is important for new technicians to seek answers promptly and address any other concerns with their trainers or SP leaders. 🕒