Pathways
Onboarding Manual

[NAME]
[JOB TITLE/POSITION]
[PROGRAM]
[COUNTY NAME]

By [Supervisor's Name]

SAMPLE – STATE DIRECTOR'S WELCOME LETTER

Welcome to the Pathways team!

A little bit about us…

Pathways is a well-known, respected National provider of high quality outpatient behavioral health care, delivering affordable and accessible services through innovation and effective collaboration with community partners. In California alone, we have over 30 programs that are nestled in the communities across four different counties, Kern, Los Angeles, Orange, and San Diego. We have joined forces with local government agencies, managed care companies and school districts to serve some of the most vulnerable members of our society. Together, the California Pathways team is 650 employees strong and, we are thrilled you have chosen to join us!

Our goal *and your new role…*

We are here to help people find purpose and meaning in their lives through genuine support and care. As a new member of the team, I welcome you and thank you for assuming this responsibility. Our focus on customer-centered care emphasizes the importance of excellence in service delivery and high quality, individualized care. Whether you are a provider of direct services or in an administrative position, you have a vital role in ensuring that those we serve receive the very best care and customer service possible.

Our commitment to you…

We will make every effort to support you and to create an environment in which you can achieve your highest level of excellence and thrive in your role. You are our greatest asset!

So, *greatness starts here*, with each team member, and we are delighted to have you on board!

Sincerely,

GLaporte

Gail Laporte, LCSW
State Director

We Value: Customer-centered care, innovation and evolution, being true to our word, a compassionate culture, embracing and respecting diversity, results, and collaboration.

Introduction

Dear [Employee's Name]
Welcome to Pathways! We are excited to have you on our team as the newest [position] at [program's name]! To continue your journey, we would like to provide you with this on-boarding manual. We will use this as a guide to ensure that your new role integration is successful with other members of the team. To start, we would like to provide you with an overview of this onboarding manual and the process.

Overall Objectives of this Onboarding Tool

This 90-day onboarding manual is a flexible guide for you to review with your immediate leader. It is intended to be used as a discussion starter during the first few weeks of your transition and provide you with the framework necessary to ensure a smooth transition in order for you to succeed in your new role.

Through this onboarding manual, our goal is that you:

1. Get to know your organization
2. Get to know your program/department
3. Get to know your work environment by building rapport with your team and creating a network of relationships
4. Leverage your Core Assimilation Team
5. Understand the expectations of your role
6. Have all the tools to be a successful employee!

Table of Contents

Objective IV: HR Related New Hire Paperwork, Forms and P&Ps

- Complete New Hire Orientation Paperwork
- Payroll Time Sheet and Rest Breaks/Lunch
- EAP and VOEs
- Employee Self Service Portal (ADP)/Benefits
- Request for Time Off (Vacation/Sick Accrual) and Make-up Time
- Holiday and Payroll Schedule
- Travel and Training Reimbursement Form
- Employee Reimbursement/Check Request
- Education Reimbursement
- Employee Referral Form
- Company Property Acknowledgment Form
- After Hours Crisis Cell/Log, On-Call Stipend (If Applicable)
- If application for NPI Number
- All Other Program and County Specific Paperwork
- For Managers Only: Contact HR for HR Supervisor 101 training

Objective V: New Hire Online Training

- Confidentiality and HIPAA (Relias)
- Environmental Safety (Relias)
- Cultural Diversity in Behavioral Health (Relias)
- Corporate Ethics (Relias)
- Understanding Preventing Workplace Harassment (Relias)
- IT training
- And other County and program specific on-line training

Objective VI: Performance Management

- Job Description
- Annual Program Goals (if applicable)
- Performance Review
- Job-Related Goals and Expectations
- Billing Log (If Applicable)
- Productivity Tracking Tools (If Applicable)
- Time Management Tools

Objective VII: Job Specific Training

Attachments

- Attachment I: Incident Reporting Instructions
- Attachment II: Email Etiquette
- Attachment III: Dress Code
- Attachment IV: EAP Information
- Attachment V: ADP Portal First Time Registry
- Attachment VI: Communication Sample to Staff Regarding Travel Time, Mileage Reimbursement and Billing Travel Time
- Attachment VII: Company Property Acknowledgement Form
- Attachment VIII: Onboarding Manual Acknowledgement Form

Objective I: Overview of the Organization

Pathways

These Mission, Vision, and Core Values are pivotal to our culture, success and how we operate as an organization.

Mission Statement

Our mission is to provide quality health care to people receiving government assistance.

Vision Statement

We envision a future where everyone receives quality health care.

Core Values:

- **Caring:** We care about those we serve and advocate on their behalf. We assume the best about people and listen so that we can learn.
- **Enthusiastic:** We enthusiastically address problems and seek creative solutions.
- **Respectful:** We respect each other and value ethical business practices.
- **Focused:** We focus on our mission.
- **Thrifty:** We are careful with scarce resources. Little things matter and nickels add up.
- **Accountable:** We are personally accountable for our actions and collaborate to get results.
- **Feedback:** We strive to improve the organization and achieve meaningful change through feedback and coaching. Feedback is a gift.
- **One Pathways:** We are one organization. We are a team.

We strive to be an exemplary organization!

Pathways is one of the largest ***national*** providers of accessible, outcome-based behavioral and mental health services. It was founded in 1997 in response to increasing government initiatives to privatize human services. We currently have more than 5,000 employees who provide the highest quality home- and community-based social services in 17 states and the District of Columbia.

Our parent company, Atar Capital, is a leading global private equity firm with a 60 year, proven track record of helping to strengthen businesses and service providers. They are committed to our growth and vitality, support our purpose, and value the work we do.

Introduction to the National Leadership Team

Jill Winters, Chief Executive Officer:

Jill is an experienced healthcare management executive with several years of experience in the healthcare industry. Prior to Pathways, Jill has held positions of increased responsibility over the past 20 years at United Healthcare, serving as President of the company's Medicare & Retirement Central Region, as well as Chief Field Executive Officer of its Medicare Solutions business.

Breeann Hoerning, Vice President of Operations:

Breeann Hoerning is a passionate and enthusiastic leader with extensive knowledge of the health care system. She possesses a bachelor of science from the University of Arizona and an MBA from the University of Phoenix. She joined the company in 2000 as a finance team member until moving to corporate strategy, then operations. She is responsible for 12 entities in ten states, including AZ, CA, CO, ID, IL, IN, NV, ME, OR, and WA. Breeann has expertise in new business development, collaborative care models, strategic planning, revenue cycle management, software maintenance and implementation, financial analysis, operational evaluation and efficiency, and project management.

Rick Smith, Vice President of Operations:

Rick is an alumna of Virginia Tech University and began his professional career with the Virginia Department of Juvenile Justice serving in many roles that included Parole Officer and a homebound teacher with Roanoke City Schools. Prior to beginning his current 14-year career with our company, he was an Operations Manager for Norfolk Southern Railroad. He has served in a variety of roles with Pathways including Regional Director, Director of Operations, State Director and Chief Operating Officer. Rick is responsible for the following states, including DE, GA, LA, NC, PA, TN, VA, and the District of Columbia. His expertise and contributions to the company have included new program development (Day Treatment), evolving state operations in the Pathways Triad Model, systems and process creation (Caseworks) and critical event resolution.

Joyce Montes, Vice President of Compliance & Regulatory Affairs

Joyce is an attorney who earned her Juris Doctor degree from the University of Arizona in 1989. A lifelong passion for child advocacy as well as an interest in community mental health programs led Joyce to Providence Service Corporation. Joyce joined the company in April, 2004, as Assistant General Counsel. On June 1, 2013, Joyce became General Counsel and Chief Privacy Officer of Providence Human Services. Joyce transitioned to a new role, Vice President of Compliance & Regulatory Affairs of Pathways on November 1, 2015. In that role, Joyce has developed and facilitated the growth of the Compliance and Quality programs within Pathways, and works to continually improve the compliance and quality programs across the Pathways family of companies. In her role, Joyce also serves as a regulatory resource to the company.

Amanda Galath, Vice President, Quality Improvement

Amanda Galath is responsible to oversee quality improvement (QI) systems across Pathways. She has a Bachelor's in psychology and MBA from CSU, Long Beach, where she is an alumni member. With over 15 years at Pathways, she has developed and implemented QI systems for multiple divisions. She possesses extensive knowledge of compliance, policies and procedures, data outcomes, the Health Insurance Portability and Accountability Act (HIPAA), Risk Management and Medicaid certification and provider standards. Amanda serves on several agency-wide committees such as National Quality Assurance, HIPAA, Morbidity and Mortality, and evidence-based practices.

Allen Wolfenbarger, Assistant VP of Finance

Allen Wolfenbarger is a Certified Public Accountant with over 20 years of accounting experience in many different industries. He oversees the financial operations for Pathways at the national level. Allen served in the US Air Force for 8 years in the 80s and 90s.

Mark Holbert, Vice President of Information Technology

Mark Holbert is responsible for all of Pathways' IT operations. His expertise is in cloud technology, electronic health record systems, and a variety of other information technology applications and processes.

Denise Carpenter, Vice President of Human Resources

Denise is the National HR Leader at Pathways. Denise also has oversight of the Corporate Administration, Recruitment, Payroll and Learning and Development teams. She has over 25 years of HR practitioner and leadership experience. Denise demonstrates what it truly means when you hear People, Passion, Service.

Trang Massie, HR Director - West Region: (Arizona, *California*, Colorado, Idaho, Nevada, Oregon, and Washington):

Trang Massie is a graduate of Cal State University, Fullerton with her Bachelor's Degree in Business Administration and a concentration in Human Resources. She is a member of SHRM (Society for Human Resource Management) and PIHRA (Professionals in Human Resources Association). With 15+ years of HR experience, she continues to focus on all facets of Human Resources and specializing in Employee Relations. Trang joined our company in May, 2013, as a Director of Human Resources under National leadership and leads a team of five staff in support of the West Region.

Overview of Pathways of [insert your state]:

[SAMPLE - CA]
Introduction to your State Leadership and Support Team

Gail Laporte, CA State Director:

Gail is a licensed clinical social worker with over 20 years of experience in the field of behavioral health community-based services. She possesses a Bachelor's in Psychology and a Master of Social Work from CSU, Long Beach. Gail joined the Pathways team in February, 2016, as the Orange County Regional Director of the Full-Service Partnerships after serving 16 years with the Orange County, Health Care Agency. Gail became the State Director in March, 2017. Over the course of her career, Gail has gained widespread experience working in government-operated and contracted community-based service delivery systems and managed care behavioral health operations.

Katherine Lee, California State Clinical Director:

Katherine joined Pathways in May, 2011, as the Regional Director for Orange County Adult programs. She had over 20 years of experience in human services before her promotion to California State Clinical Director in April, 2017. Katherine is skilled in service delivery to diverse populations, from children to older adults, and has worked in many different settings such as schools, youth community services, state mental hospital, community medical hospital, prison program, drug rehab outpatient programs, mental health community programs, and private practice. She has received accolades for her leadership and contribution to the community. Since joining Pathways in 2011, she has enhanced her region fiscally and improved the quality of services, while remaining dedicated to expanding peer-mentoring and support programs and the Wellness Center Central. She is a licensed clinical social worker and possesses a doctorate in Organizational Leadership.

Marni Orsbern, State Director of Quality Improvement and Privacy Officer:

Marni possesses a Doctorate of Psychology and has worked with the company since 2008. She has extensive knowledge in the area of community-based behavioral health services and her experience ranges from direct service provider to oversight of outpatient services. Marni has wide-ranging knowledge of Medi-Cal, Medicare, HIPAA and Privacy rules and regulations, and risk management. She has worked closely with county and state representatives to ensure our programs are fully compliant with local, State, and Federal guidelines. Marni is also responsible for quality-improvement activities for our California programs, including documentation training, is on the performance data outcomes team, and assists with tracking service utilization regarding our MHSA programs. She is an active member of both National and State Pathways QI/QA committees for Quality Assurance, Evidence-Based Practices, and HIPAA and serves as the HIPAA Privacy Officer for the State of California.

Links to Information about Pathways:

Pathways general website: http://www.pathways.com

Pathways Intranet link (employee use only):

https://intranet.provcorp.com/SitePages/Home.aspx or click on the Explore icon on your computer. You will find information and/or direct links to the following and more:

- Pathways' Mission, Vision, and Values
- Pathways' Code of Conduct
- Relias – Pathways Learning Management System, online learning system
- ADP Employee Self Service
- EXYM and AVATAR – E.H.R.
- To retrieve Pathway templates (i.e. letter temp, fax form, meeting minutes, meeting agenda), click on "Pathways Logos & Templates" on the left from the main intranet page → click on "Templates"
- For our Mental Health Policies and Procedures (P&Ps) →[click on "Regional" on top of the main page → click on "Pacific" → click on "California" → "Mental Health Policies and Procedures"]
- For HR information, click on "Departments" on top → click on "Human Resources"
  - ✓ For information on your HR representatives: [click on "California" under "HR Contact Information" on the bottom]
  - ✓ For all the updated forms: click on "Site Contents" on the left → click on "Forms Library"

Please visit our website and social media to find information on all of our programs and other important information:

Pathways of [name of your state if you have a state specific website] Website: [link to the website]

HR Forms: [link to the state specific share site]

LinkedIn: https://www.linkedin.com/company-beta/18026307/?pathWildcard=18026307

Facebook: [link to the state specific Facebook account]

Objective II: Overview of the Work Environment

A healthy and safe work environment is crucial for you to thrive and succeed. Your training supervisor will review the following to ensure that you acclimate to your work setting.

Areas to Review	Date of Completion	Initial of the supervisor
Overview of the program/department goals		
Office Tour		
Introduction of your leadership team		
Introduction of your core assimilation team (*see below)		
Office policies and procedures		
Introduction of the officemates (if applicable)		
Office and other security/alarm system codes		
Set up computer, Outlook, Relias, and other job related tools		
Provide key, badge, mobile devices, and sign Statement of Possession		
Core meetings to attend		
Contact information for IT (ITSupport@Pathways.com) and HR [HRWest@Pathways.com], and other internal resources		
Community Resources		

Your *Core Assimilation Team is made up of:

- Your Immediate Leader – [Name of employee's immediate leader]
- Onboarding Buddies – [Names of employee's buddies]
- Other team members:

NAME	TITLE	DEPARTMENT	CONTACT INFORMATION

Your immediate leader and onboarding buddies will serve as partners to support your integration to your new role. Utilize this team to address your questions and concerns as you onboard.

When you meet with your immediate leader, you may want to get these questions answered:

- In my new role, what do you need from me?
- What do I need from you as my leader?
- How do you want to communicate with each other?

We also recommend that over the next three (3) months, you hold regular meetings with your immediate leader:

- To establish the **Top 3 Goals** to achieve in the first 90 days.
- **Review business results** and discuss transition progress and challenges.
- Understand his or her thoughts on **key focus areas** for you and your team.
- Clarify and establish annual **performance expectations**.
- Share your early view, including **key observations,** challenges, and opportunities.
- Share your Leadership Plan.
- Check your progress.

Best Practice Tips:

- Consider scheduling weekly meetings with your immediate leader for the first month and then scale back as needed.
- Review the **Top 3 goals** to be achieved in the first 90 days with your leader.

Objective III: Expectations of all Employees

a. Critical Meetings

As a new employee, you will spend a lot of time getting to know and understand your new environment and building new and evolving relationships. To accelerate your assimilation into the Pathways culture, as a new employee, your participation and attendance in these core meetings will be helpful. They will aid in:

- Becoming a highly successful employee of the Pathways and establish a presence in the organization as a new employee.
- Becoming a highly functioning member of our team and gain deeper understanding of the mission/goals of our organization and the community we serve.

With that objective in mind, we have identified a list (see below) of core meetings, critical events, and ***training opportunities for you to attend in the first 90 days.***

MEETING TITLE	DATE/TIME	LOCATION	CONTACT
1:1 Supervision with [Training Supervisor's Name]	[TBD-Ongoing]	Phone or in person	[Supervisor's Name & Contact Info.]
Onboarding Training	[TBD]	[TBD]	[Supervisor's Name]
Staff meeting	[TBD]	[TBD]	[Supervisor's Name]
Buddy check-in's	[TBD]	[TBD]	[Supervisor's Name]
Documentation Training	[TBD]	[TBD]	[Trainer's Name]
HR & other P&P Training	[TBD]	[TBD]	[Trainer's Name]
[Other Training]	[TBD]	[TBD]	[Trainer's Name]

Review of HR Employee Handbook

Our HR Employee Handbook has valuable and important information you need from your benefits to employee code of conduct. Please take ample time to review.

You can also download the latest copy of the HR Employee Handbook at:
https://intranet.provcorp.com/departments/hr/Forms%20Library/Forms/AllItems.aspx

Please feel free to direct your questions to your supervisor or email *[HRWest@pathways.com]*.

Please sign the *Employee Acknowledgement Form* after you have received and reviewed the HR Employee Handbook and provide the signed form to your supervisor.

Injury or Incident Reports

Work-related Injury: If you get injured while you are on duty, please contact your direct supervisor immediately. If your immediate supervisor is not available, please contact your program director immediately. No matter how minor an on-the-job injury may appear, it is imperative that you report it to your direct supervisor immediately.

For any work-related injuries, please call Medcor (Injury Nurse Triage Program) at 1-844-871-8630. Medcor is available 24 hours a day, 7 days a week and provides immediate access to qualified medical professionals who will offer sound recommendations regarding immediate medical care for work related injuries or off-site treatment when necessary. Medcor will also assist with the Workers' Compensation claims reporting process as necessary. Please contact Human Resources by emailing [HRWest@pathways.com] with any questions.

Incident Reports:
Your training/direct supervisor will review the Incident Reporting Instructions (please see attachment I) and the Incident Report.

Continuing Education/Training

As a learning organization, Pathways values professional development of our employees. Through the Relias learning and development management system, Pathways provides hundreds of online learning modules and courses for your professional development. Many of these online courses are approved by the California Board of Behavioral Science (BBS) and you can earn CEU's.
Here is a link to Relias:
https://pathwayshealth.training.reliaslearning.com/lib/Authenticate.aspx?ReturnUrl=%2f

Your User Name is your First Name, space, Last Name, and your password is the last four digits of your social security number.

Please ask your supervisor for other training and learning opportunities!

Voicemail and Email

By now, your direct supervisor or the office manager have set up your voicemail and email. Emails and voicemails are very important part of professional communication.

Please refer to "*Attachment II*" for professional email etiquettes.

When leaving your voicemail, please refer to this format:
"Hi, this is [your name], [your title] of [your program name] of Pathways. Unfortunately, I am unable to take your call right now, but if you leave me your name, phone number, and a brief message, I will return your call as soon as possible. If you need immediate assistance, please call [office number] and ask to speak to [the officer of the day or your supervisor]. If this is a life threatening emergency, please hang up and immediately call 911. Thank you."

Excellence in Customer Service

Our organization values and expects all our employees to provide excellent customer service to all of our internal (e.g. colleagues, other team members, supervisors, internal support teams, etc.) and external customers (e.g. clients, our funders, government officials, other providers, various community members, etc.). Please spend some time to identify your internal and external customers with your direct supervisor and discuss ways to provide the best customer service possible.

Here are some tips on providing great customer service:

Patience

Not only is patience important to customers, who often reach out for support when they are confused and frustrated, but it is also important to the business at large: great service beats fast service every single time.

Be a Good Listener

Take the time to identify customer needs by asking questions and concentrating on what the customer is really saying. Listen to their words, the tone of voice, body language, and most importantly, how they feel. Beware of making assumptions - thinking you intuitively know what the customer wants. Do you know what three things are most important to your customer? This is easier said than done.

Clear Communication

Make sure you are getting to the problem at-hand quickly. You need to be cautious about how some of your communication habits translate to customers, and it is best to err on the side of caution whenever you find yourself questioning a situation.

Identify and Anticipate Needs

Customers do not buy products or services. They buy good feelings and solutions to problems. Most customer needs are emotional rather than logical. The more you know your customers, the better you become at anticipating their concerns. Communicate regularly so that you are aware of problems or upcoming needs.

Make Customers Feel Important and Appreciated

Treat them as individuals. Always use their name and find ways to compliment them, but be sincere. People value sincerity. It creates good feelings and trust. Think about ways to generate good feelings about doing business with you. Customers are very sensitive and know whether or not you really care about them. Thank them every time you get a chance.

Body Language Is Key

Be sure that your body language conveys sincerity when meeting with customers. Your words and actions should be congruent.

Appreciate the Power of "Yes"

Always look for ways to help your customers. When they have a request (as long as it is reasonable) tell them that you can do it. Figure out how afterward. Look for ways to make doing business with you easy. Always do what you say you are going to do.

Ability to Use "Positive Language"

Language is a very important part of persuasion, and people (especially customers) create perceptions about you and your company based off of the language that you use.

Ex. *Without* positive language: "I can't see you until next week. I don't have any time available"
With positive language: "My earliest availability is next week. Would you like for me schedule an appointment?"

Know When and How to Apologize

When something goes wrong, apologize. It is easy and customers like it. The customer may not always be right, but the customer must always get their needs met. Deal with problems immediately and let customers know what you have done. Make it simple for customers to complain. Value their complaints. As much as we dislike it, it gives us an opportunity to improve. Even if customers are having a bad day, go out of your way to make them feel comfortable.

Get Regular Feedback

Encourage and welcome suggestions about how you could improve. There are several ways in which you can find out what customers think and feel about your services.

- Listen carefully to what they say.
- Check back regularly to see how things are going.
- Provide a method that invites constructive criticism, comments, and suggestions.

Dress Code

Appropriate dress is one of the most common associations made to professionalism. Therefore, Pathways has established a dress code to ensure that our employees represent our organization in a professional manner.

Please see **"Attachment III"** or follow the link below to review our policy:

https://intranet.provcorp.com/departments/hr/Forms%20Library/Forms/AllItems.aspx

I have read and signed the Dress Code Memo by HR on_____________(date).

Objective IV: New Hire Paperwork and Forms

Your supervisor will review and help you to complete the following important paperwork related to your job:

(You can also download the following paperwork on https://intranet.provcorp.com/departments/hr/Forms%20Library/Forms/AllItems.aspx under [HR West Forms])

Paper work	Date of Completion	Supervisor's Initials
New Hire Orientation Paperwork		
Payroll Time Sheet		
EAP (Attachment IV) and VOEs		
Employee Self Service Portal (ADP)/Benefits (Attachment V) ***You can access benefit information, update your address, marital status information, change federal tax withholdings, change direct deposit information, view your pay-stubs, W2, and more)*** ***If you forget your password or need to reset it, please email*** [HRWest@Pathways.com]		
Request for Time Off (Vacation and Sick Accrual), Make-Up Time		
Holiday and Payroll Schedule		
Travel and Training Reimbursement Policy and Forms (Attachment VI)		
Employee Reimbursement/Check Request		
Education Reimbursement		

Employee Referral Form		
Company Property Acknowledgment Form (Attachment VII), ***Please Sign the Form and Return it to Your Supervisor***		
After Hours Crisis Cell/Log, On-call Stipend (if applicable)		
(If applicable) Apply for NPI Number using this link: https://nppes.cms.hhs.gov/#/		
All Other Program Specific Paper Work (please specify):		
For Mangers Only: Please Contact HR for Supervisor 101 Training		

Objective V: New Hire Online Training

Please ensure that you take the following mandated training for new-hire employees on Relias within the first 30 days of employment. Here is the link for your reference:

https://pathwayshealth.training.reliaslearning.com/lib/Authenticate.aspx?ReturnUrl=%2f:

Training	Date Completed	Supervisor's Initials
Confidentiality and HIPAA		
Environmental Safety		
Cultural Diversity in Behavioral Health		
Corporate Ethics		
Understanding Preventing Workplace Harassment		
IT Training		
Other program specific mandated on-line training (please specify)		

Objective VI: Performance Management

Your success at Pathways is very important to us! Therefore, we want to ensure that you understand your job duties, your goals, how your performance will be evaluated, and other job-related expectations. You supervisors will review the following related to your performance management:

Performance Management	Date of Review	Supervisor's Initial
Job Description		
Annual Program/Department Goals		
Performance Evaluation Goals (KPIs) and the Review Process		
Other Job-Related Goals Expectations		
Billing Log (If Applicable)		
Productivity Tracking Tools (If Applicable)		

The following page outlines some time management suggestions that you might find helpful. Also, ask your supervisor for any on-site tools specific to your role.

Time Management:

“Time is really the only capital that any human being has, and the only thing that one can’t afford to lose” – Thomas Edison

Time management is the key to success at your new job! Here are some useful tips to manage your time more effectively:

- **Pre-plan the day and make a to-do list:** Spend at least a few minutes at the start of each day for planning to schedule your day and prioritize the list
- **Set goals:** Without setting your goals correctly, it is impossible to focus on a plan to achieve them. That is why goal setting is so vital to time management and developing focus!
- **Utilize your outlook calendar effectively:** This is a very useful tool for time management. Make it work for you!
- **Batch similar tasks:** Cut down on time you waste transitioning between tasks by doing similar things at the same time (like replaying to emails)
- **Turn some tasks into habits:** Make things easier by turning work tasks into a regular routine
- **Delegate and share duties if possible:** There are things you must do and then there are other tasks you can easily hand off or share to give you the time to do what must be done (especially for the managers)
- **Use clear communications:** If you can’t express what you need, and listen to others as they respond, you are going to face unnecessary obstacles
- **Block out time on your calendar for specific tasks:** This will hold you accountable; help you avoid procrastinating and make you take tasks seriously
- **Set boundaries and learn to say “no”:** If you have limited time, you need to set boundaries and to say “no” to focus on your given tasks; however, flexibility is important, so check-in with your supervisor if you feel saying no may not be in the best interest of the company
- **Do your work:** At least 75% of your working day should actually be spent working through the tasks you have set yourself for the day. Do not spend all day planning and end up running out of time to actually do the work you need to do!
- **Write tomorrow’s to-do list:** Do this at the end of the working day so that you can start afresh in the morning. This will also help your mind and your body “go home” and “switch off” together

Objective VII: Job Specific Training (to be included by the program)

Attachment I (Incident Reporting Instructions)

Incident Reporting Instructions

General Directions

- The Incident Report Form (Form) is available from any program manager;
- For Critical Incidents, the Form shall be forwarded to the State Privacy officer and nationalincidentreporting@pathways.com within 24 hours of discovery
  - Consumer deaths due to unnatural causes (including suicide)
  - Homicides of, or committed by, a PHS consumer
  - Medication errors resulting in injury to the consumer
  - Physical intervention/restraint that result in injury to consumers
  - Privacy or Security Policy violations that could result in a breach of consumer's protected health information
  - Consumer abduction/trafficking
  - Incidents involving alleged Medicare of Medicaid fraud
  - Any incident that, in the judgment of the State Director, may result in high risk and/or negative media coverage.
- The Form shall be filled out immediately after the situation is stabilized;
- The employee involved in, observing, or discovering an incident or unusual occurrence (Incident) is responsible for filling out the Form;
- An Incident which is of sensitive or urgent nature shall be immediately reported verbally to a supervisor who will communicate it to nationalincidentreporting@pathways.com;
- The Incident Report form shall be filled out completely and must be typed;
- Employees shall refrain from discussing any Incidents with or in the presence of other employees, clients, visitors or others outside of Pathways Human Services.

Facility Information

- Enter the name, address, and phone number of the facility or program that works with the client involved in the Incident or where the Incident took place;
- The "Type of Service Provided" should describe the type(s) of services provided at that location (Outpatient MH, Foster Care, Autism, IDD, VRP, FSP, etc.) and the population served (child, TAY, Adult, Older Adult).
- If the location where the Incident occurred is different than the location of the facility, enter the address of where the Incident occurred;

Parties Involved Information

- Enter the information of the person who the Incident report is about;
- If there is more than one person involved in the Incident use the supplemental page and enter the other person's information there;
- In the "Role" area check the box that applies to the person involved in the incident, if none of the options apply, check the "Other" box and explain;
- A new box for client "Diagnosis" was recently added to the form. Enter the primary diagnosis for the client.

Date and Time

- Enter the actual Date and Time of the Incident;
- If the Incident occurred in the past and is just coming to light, enter the date and time that the Incident was discovered;

Incident Type

- Check all Incident Types that apply to the Incident that you are reporting on;
- If the Incident Type is not listed the check the “Other” box and explain what type of Incident you are reporting on;

Services Provided

- Check all services that we provide the client involved in the Incident;
- If the person involved in the Incident is not a client, then check the “Other” box and enter “Not a client”;
- If the services we provide the client do not appear on the list, then check the “Other” box and enter the services that we do provide;

Incident Description

- The Incident Description shall contain an objective, descriptive statement of the facts (i.e. Who, What, Where, When and How) personally observed;
- Include factors that led up to the incident. Provide enough background or context so that the incident may be better understood by the reader.
- The Incident Description shall not contain interpretation, fault-finding, assumptions, educated guesses, “drawn conclusions” or recommendations;
- “Follow-Up Actions Taken” should include any actions taken immediately after the incident in order to investigate or mitigate damage from the incident.

Witnesses

- In the “Name” space, enter the name of the person who witnessed the Incident;
- In the “Description” space check the box that applies to the person witnessing the Incident, if none of the options apply check the “Other” box and explain;

Notifications

- May include notifications to law enforcement, regulatory agencies, payers, contractors, etc.
- Name – enter the name of the person notified;
- Position - enter the person’s title or another description (i.e. Mother, Grandfather, or Aunt);
- Phone Number - enter the person’s phone number;
- Date - enter the date that the person was notified;

Reporter’s Information

- Enter the Name of the person filling out the report;
- Enter the Date and Time that the report was filled out;
- Inquire whether the State Director or her/his designee anticipates legal or media involvement and check those options accordingly

Attachment II: Email Etiquettes

The Dos and Don’ts of professional emails:

The Dos:

Do: Use proper salutation

Opening an email with "hi" or "hey" might be OK for colleagues you are friendly with, but for new contacts, Schweitzer advised beginning your email with a proper, respectful salutation, such as "good morning," "good afternoon," "good evening" or "hello."

"'Good day' or 'greetings' are other phrases used frequently in the international arena," she added.

Do: Proofread

Before you send, make sure to carefully proofread and edit your email. You should look for misspellings, homonyms, grammar and punctuation errors, Smith said. Careless email mistakes will only make you look bad to your recipients.

"These errors look unprofessional and reduce the likelihood that the email will be taken seriously," added Schweitzer. "Email software comes with many professional tools such as Spell Check. Use them."

Do: Stay concise

It is always best to keep your emails short and sweet. Emails are not meant to be as brief as text messages, Smith said, but they are meant to be a form of quick communication. If your email is too wordy, try editing it down to make it more concise.

"Recipients will only read the first line or two before deciding whether to keep or delete [an email]," Smith said. "Be sure you are saying what you need to say sufficiently."

Do: Keep Calm

Never send any email while you are angry or otherwise emotional, Smith advised. Instead, try to calm down and then speak to the person you need to address face to face or over the phone if an in-person meeting is not possible. Doing so could help you avoid an unnecessary altercation, Smith said.

The Don’ts:

Don't: Use buzzwords

Acronyms and buzzwords can confuse recipients and make you look unprofessional, said Smith. Stick to writing out full words and use layman's terms to get your point across, although exceptions can be made depending on whom you are emailing. For example, acronyms may be acceptable in the occasional internal email, but any email you send – especially to clients – should be written in language that is easy to understand, Smith said.

Don't: Put anyone down

Emails can be shared quickly and easily, and there are consequences to disparaging others in lasting, digital communications. Avoid embarrassing yourself – or worse, losing your job – by making sure you do not badmouth any colleagues or business partners.

"You never want to say anything bad about someone in an email," Smith said. "It is simply too easy for it to be forwarded and have it end up being read by someone for whom it was not intended."

Don't: Punctuate poorly

When you're writing a professional email, keep the exclamation marks to a minimum. One exclamation mark is too many, Smith said. Keep your punctuation professional, and unless you are friendly with the intended recipient, Smith said you should avoid using emoticons in emails, too.

"Those little blinking icons are for text messages," said Schweitzer. "They are inappropriate and unprofessional in a business email. Emoticons may divert email to a spam filter or junk mailbox."

Don't: Forget the conversation closer

End your email with a closing such as "best," "best regards," "sincerely," "thank you," or another appropriate phrase.

"By letting the recipient know that a response isn't needed, the email cycle doesn't continue on in perpetuity," said Schweitzer.

Other closer options include "no reply necessary," "thank you again," "see you at the meeting" and "please let me know if I may be of further assistance."

How to CC and BCC properly

The carbon copy (CC) and blind carbon copy (BCC) tools are tricky. Sometimes they are useful, but if used improperly, they can be problematic.

When you are using the CC feature, Smith said to keep in mind that less is more. You also need to think about what it is that you are sending and how important it is to others.

"Truly consider who needs to be in the loop on this communication," Smith said. "Do they need this information, or is there something they can add to the conversation?"

Schweitzer added that sometimes people are so proud of their work product that they add a dozen recipients in the CC line and then bask in the limelight of afterglow when everyone comments about how much or how well they are doing. This may be interpreted as slick boasting, a cry for attention or self-centeredness, so keep CCs to only those with a need to know.

The BCC feature allows you to add someone to an email conversation without others knowing, so it can be a little harder to determine when or if it is right to use it. Smith said that there are times when BCC-ing others is a good idea.

By Business News Daily: http://www.businessnewsdaily.com/8262-email-etiquette-tips.html

Encrypting emails:

E-Mail with ePHI sent from a Pathways e-mail address to another Pathways e-mail address: Approved with no conditions as e-mail within the organization is implicitly encrypted.

E-Mail with ePHI sent from a Pathways e-mail address to a non- Pathways e-mail address but one which is approved by management to receive ePHI, such as payers, auditors, government organizations with which Pathways does business and regulatory agencies under which Pathways operates: Approved with the condition that the bracket-bounded keyword **[Encrypt]** is present in the e-mail subject or body and the e-mail is therefore automatically encrypted. IMPORTANT NOTE: Please ensure you use the correct square bracket [bracket] and NOT the squiggly one {incorrect bracket}. Otherwise, your emails will be sent unencrypted. Triple check before you hit send.

NOT Approved to send:

E-Mail with ePHI sent from a Pathways e-mail address to a non-Pathways e-mail address that is not approved by management such as a personal e-mail address of staff, clients, friends, family or an agency with which we are not doing business or do not have the necessary documents in place to receive our ePHI. E-Mail with ePHI sent from a non-Pathways e-mail address. Additionally, all staff, contractors or other direct service providers must use Pathways e-mail for any ePHI communications.

Attachment III: Dress Code Memo

Pathways™

MEMO Dress Code

To: ______________________
(Employee/Print Name)

From: ______________________
(Supervisor/Print Name)

Date: ______________________
(Date Property Received)

Re: Dress Code Policy – All Genders

PERSONAL APPEARANCE: Employees' personal / professional appearance can contribute to the perception of an employee's competencies. Pathways requires that employee's report for work neatly groomed and appropriately dressed.

Your program or office location has a business-casual dress code and expect all staff to "dress for their day" based on your schedule (i.e. for certain meetings, visitors, travel, events, presentations, court, etc.) since you represent our organization. **Note**: Field or remote staff may wear more casual attire as appropriate with clients, environment, and/or traveling location.

ACCEPTABLE
Sport shirts; blouses, sweaters, pull-over shirts; button down shirts, pressed clean pants. Jeans are acceptable provided they are clean, do not have holes, tears or rips; are not excessively tight or saggy; do not contain unfinished seams or hems. Business-casual dress; skirts (length not more than 3 inches above the knee, including any slits).

UNACCEPTABLE	
Clothing	***Shoes***
Recreational or casual type clothing may not be worn, including but not limited to: Sports jerseys or exercise clothing; yoga pants, "Sweats" or jogging suits (including velour); shorts of any length; shirts with inappropriate messages, pictures, numbers, slogans or logos; or politically inspired. Hats or baseball caps.	Flip-flops are unacceptable; however, sandals may be worn if they have heel straps and not deemed too casual for the work place. Any shoes that are not safe when moving quickly are unacceptable; ***No tennis shoes*** unless appropriate in the field and/or worn to handle a specific project, move, storage, etc. (Boots and snow/rain boots are acceptable)
Other items deemed inappropriate by management: Excessively tight or loose pants/slacks; bare feet are not acceptable, bare midriffs, cleavage showing, revealing attire, off-the-shoulder tops, clinging clothing, spaghetti straps, tube tops, halter tops, crop tops, see-through materials; transparent garments or a braless look, tank tops, holes or ripped clothing. No underwear showing. All clothing must be clean and without damage. All seams must be finished. Offensive tattoos and/or piercings.	

In cases in which staff are participating in an event or activity with a client (e.g., bowling, playing basketball, hiking, volunteering, company event(s), etc.), staff may be permitted to wear clothing that is otherwise "unacceptable" with permission from supervisor(s). It is not possible to cover every option with regard to projecting a business-like image. However, the above standards should provide workable guidelines. Some basic essentials of appropriate dress include the need for clothing to be neat and clean. Extremes in fashion, dress, accessory, fragrance, or hair, including poor hygiene are not permitted at any time.

EMPLOYEE'S RESPONSIBILITY: You are expected to conform to the dress and grooming standards established by your supervisor. ***Supervisors have the discretion to determine appropriateness in appearance in concurrence with your program's or location dress code policy.*** The lists above are not all inclusive. Employees who do not meet the above standards may be sent home to change and will not be paid for that time off.

Consult your supervisor or Human Resources if you have any questions. As a rule of thumb, if you are unsure whether an article of clothing is acceptable, please err on the side of conservatism and discretion and refrain from wearing it.

By signing below, I have read, understand, and will comply with this Dress Code Policy:

Employee Signature:

______________________ ______________________
Signature Date Location Name State

Attachment IV: EAP Information

FALSE.

When going through a rough patch, it can be tough to see the good things.

Life can throw a lot at you, from small worries to big concerns. If you find yourself focusing too much on relationship, work or other issues, your EAP benefit offers confidential help and support to help you take control.

A specialist will listen to your needs and connect you to the appropriate resources. Clinicians, counselors, mediators, lawyers and financial advisors are ready to help you with:

- Stress, anxiety and depression
- Marriage and parenting issues
- Workplace conflicts
- Sleeping problems
- Financial or legal questions
- Substance abuse or other addictions

>>>

As part of your benefits, EAP services are available at no extra cost. This includes referrals, seeing in-network clinicians and initial consultations with mediators or financial and legal experts

Want to retain a lawyer after your consultation? You'll get a 25 percent discount.

Access to liveandworkwell.com is always free. For more information, please refer to your employer-provided benefit information.

24-hour online access is also available at liveandworkwell.com.

You and your family can also go online any time to:

- Check benefit information
- Submit online service requests
- Search the online clinician directory
- Use our virtual help centers to find information and resources for hundreds of everyday work and life issues
- Participate in interactive, customizable self-improvement programs

All records are kept confidential in accordance with federal and state laws.

Find a better balance between your work life and your home life — so you can enjoy life.

Real people. Real life. Real solutions.

Your Employee Assistance Program

866-248-4094

Or log on to liveandworkwell.com
Access code: PWAYS

This program should not be used for emergency or urgent care needs. In an emergency, call 911 or go to the nearest emergency room. This program is not a substitute for a doctor's or professional's care. This program and its components may not be available in all states and coverage exclusions may apply.

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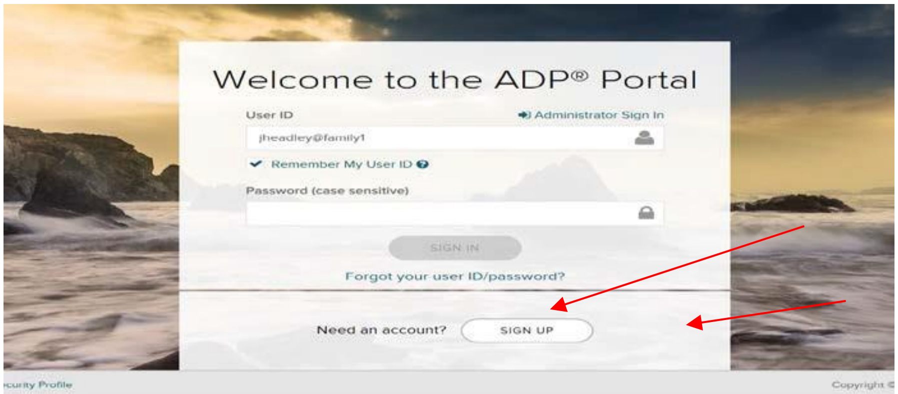
Attachment V: ADP Portal First Time Registry

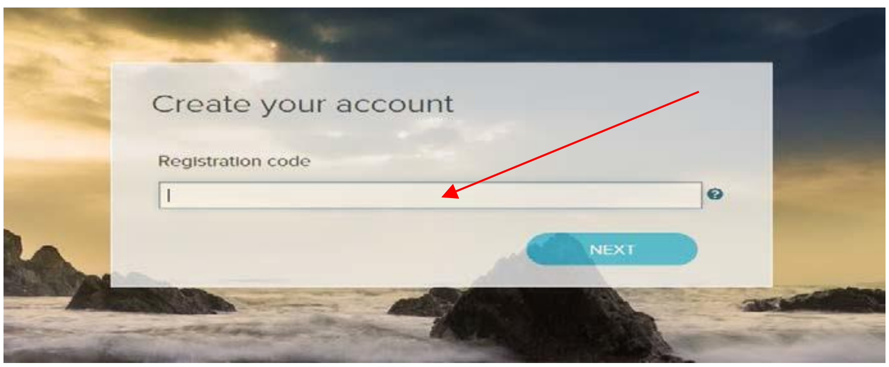
ADP Portal First Time Registry Instructions

To complete your first time registering in the portal, you will need to go to:
https://portal.adp.com

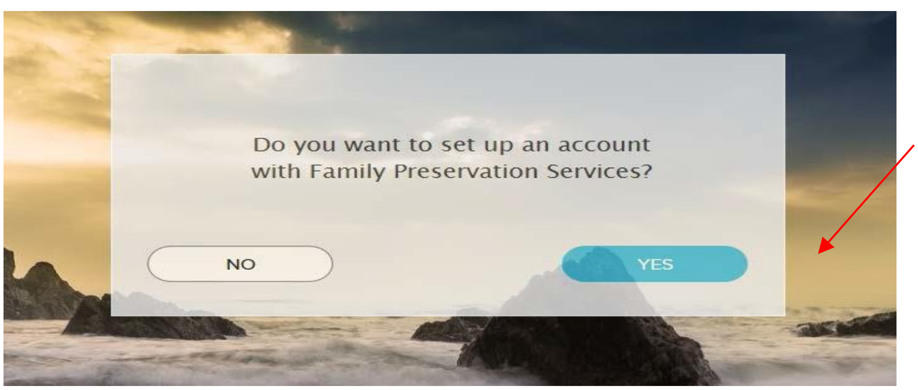
1. You will see at the bottom, Need an account? Click on the Sign Up button.



2. The next screen will ask you for a code which is family1-300.



3. The next screen will ask if you want to set-up an account with Family Preservation Services. Click Yes.



4. The next screens will ask for your information. Once you've completed inputting your info, you will be given your user id and you will be able to create a password.

Attachment VI: Communication Sample to Staff Travel Time, Mileage Reimbursement and Billing Travel Time

Pathways℠

Administrative Office – Human Resources 4281 Katella Avenue, Suite 201, Los Alamitos, CA 90720

Re: Travel Time, Mileage Reimbursement, and Billing Travel Time

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Based on your position with the company, drive time and travel may be required as part of your essential job duties. The following is to clarify or confirmation of the Company's practice, policy and expectation of all employee's related to travel time, mileage reimbursement, and billing travel time.

Mileage Reimbursement/Compensable Travel Time or Mileage:

The Company will compensate employees for travel time based on the type of travel involved during the course of their employment. There are two basic categories of employee travel:

- Portal-to-portal travel – mileage reimbursement is not reimbursable from your home to work/work to home. Employees are responsible for transporting themselves to and from work daily.

- Travel between worksites: outside of the transportation to/from home and the program – employees may submit "actual" mileage reimbursement (e.g. if it takes you 30 miles to/from the office/program from your home – and you traveled to/from other (or multiple) locations for work **without visiting the office/program,** you need to deduct 30 miles from the total daily travel. e.g. your daily travel = 90 miles, you would deduct 30 miles IF you didn't go into the office/program for that day. If you did, then you may submit 90 total miles for reimbursement. ***Why?*** *If you had no travel for that day, you are normally expected to travel that mileage as part of your normal working schedule – i.e. to and from your home and the program as your normal essential job expectations*.

An Overview: When the Company Will Pay Travel Time or Mileage

Category	Definition	Compensable travel time?	Compensable mileage expenses?
Portal-to-portal travel	Normal home-to-work / work-to-home travel at the beginning and end of one work day.	No	No
Travel between worksites	Travel in the course of a day's work from one office to another.	Yes	Yes *Only distance between sites is eligible

Billing and Documenting Travel Time:

- Travel Minutes = actual minutes traveled associated with a service and multiple services
- If traveling from your home directly to a client site – you cannot bill travel time for the drive from your home to the client site. You can bill travel time for the time it takes you to travel from the client site to your next site
- If traveling from the clinic to a client site – you bill the amount of time it takes you to travel to the site
- If traveling from client site A to client site B, you bill the time it takes you to travel between the two sites. You can bill all of the time under client A, or all of the time under client B, or split the time between client A and client B
- If you finish your day at a client site and drive home from the client site, (without returning to the clinic) – you cannot bill travel time for your drive home

Attachment VII: Company Property Acknowledgement Form

MEMO **Inter-Office**

To: ______________________________
(Employee/Print Name)

From: ______________________________
(Supervisor/Print Name)

Date: ______________________________
(Date Memo Received)

Re: **Acknowledgement of Company Property Issued**

Office Policy: Company equipment is essential to accomplishing job duties. It is expensive and may be difficult to replace. When using company property, employees are expected to exercise care, perform required maintenance, and follow all operating instructions, policy/procedures, HIPAA, safety standards and guidelines.

The following items belong to the Company. By initialing and signing below, you acknowledge receiving the listed items and understand they are considered Company property.

Company Property (item) / Serial # / Description / Type	Program/Location	Date Given/Sent	Employee Initial Received
Example: Employee Badge / Picture ID			

I am responsible for the above Company property items issued to me and may be charged for the current value of the item(s) if they are lost or damaged. The fee will be used to replace the missing/misplaced/lost or stolen company property (e.g. key(s)/access card(s), badges, etc.). **Per Company Handbook Policy**: The Company reserves the right to deduct money owed to the Company from your paycheck, in accord with applicable local and state laws. ***Examples include repayment for lost, stolen, missing, or intentionally damaged company property during the course of employment or upon termination – if property is not returned or returned in damaged condition(s)***.

Additionally, I agree to the following items in regards to work property (i.e. laptops, USBs)

- If lost or stolen please report immediately to supervisor, HR and Privacy Officer.
- It is required the employee to maintain encryption and/or password protection of the device at all times.
- The device and all information saved is the sole property of the company.
- The device must be returned upon demand and the device may be inspected by administrators upon request.
- When leaving the agency, all work related and/or client related information will be cleared from device. (this include clients' initials and numbers).

Upon termination of employment, whether voluntary or involuntary, all Company Property (e.g. key(s), badges, access card(s), cell phones, chargers, company documents, tablets, computers, training materials, company records, files, token(s), and other tangible company property) in the employee's possession or control must be returned to the Company prior to the employee's departure or in a reasonable timeframe.

By signing below I have acknowledged receiving the above Company Property and will return it as requested and if I am no longer employed with Pathways.

Employee Signature:

______________________________ ______________________________
Signature Date Location Name State

If any updates or revisions during employment, please scan/email to [HRWest@pathways.com]

Attachment VIII: Onboarding Manual Acknowledgement Form

My supervisor,___________________________________, has reviewed the onboarding manual with me on__________________. I understand the content in the onboarding manual, and I feel I am adequately trained to perform my job duties. I know I can approach ____________________________

____

(names of supervisors and "buddies") if I have any questions pertaining to my job.

Additional Comments:

____ ________________________

Name of the Employee (Print and Sign) Date