

Train the Trainer Series

New Patient Onboarding Activities

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(in-person or virtual)**
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SPECIFIC COURSE ACTIVITIES: The Patient Packet – In-Person

Instructions: Filling Out Office Forms

1. The activity begins by providing your staff with 2-3 pages of the patient information packet.
2. Provide all participants with a pen and clipboard
3. Before they begin, have each staff member put on gardening/work gloves*. You want the staff member to put on gloves that are bulky and hard to work with.
4. Start the timer for 5 minutes and have the staff fill out the patient information packet.
5. After the time is completed, ask the staff members how well they completed the task and would they be ready to meet with the staff members and provider:
 - “How easy was it to fill out the forms?”
 - “Were you anxious or calm in trying to complete this activity?”

This activity is designed to assist your staff members to experience the difficulties that many elderly patients have in completing office paperwork.

The gloves simulate the difficulties that arise for our senior patients who may be dealing with neuropathy or rheumatoid arthritis.

The time constraint provides the staff member with the type of anxiety levels that an elderly member experiences when arriving at an office and having to complete paperwork in a short amount of time.

*Gardening/work gloves (EvrldWear work gloves) can be purchased on Amazon at a cost of \$13.99 for a packet of 12 pair of gloves...size X-Large...these gloves are bulky and cumbersome...perfect for this activity:

[LINK TO GLOVES.](#)

SPECIFIC COURSE ACTIVITIES: Where or where is the Lab located? – In-Person or Virtual

Instructions: Where or Where is the Lab located?

- When a patient is new to a provider, the first meeting may cause difficulties to occur, such as, the ability to locate the office or park in an unfamiliar lot or take a new bus route. Let's also remember that not all specialists' offices or specialty services are located in the same building as the provider's office.
- For example, after meeting with the provider, a patient may need to get to the pharmacy to pick up a new prescription or go to the lab for a blood draw. How do they know where these offices are located and what is the quickest way to get there?
- This activity provides the staff with the opportunity to learn about the community they work in and how to direct patients accordingly.
- So here is where the staff will design or provide a road map so the patient is better able to access care. This activity can be done in-person with the staff or virtual by sending the instructions to the staff prior to the training and having them share their "maps" at the end of the presentation.

1. Read the Patient Situation to the staff or have a staff member participate as a reader:

Let's help our new patient, Mr. Thomas Jones. He is a 78-year-old who has been diagnosed with Diabetes Type 2, hypertension and is experiencing severe neuropathy in his left foot. Mr. Jones is able to walk with the assistance of a cane. After meeting with the provider, Dr. Jensen, Mr. Jones must go to the pharmacy to pick up new prescriptions, the lab for a blood draw to check his A1C, and to radiology for a chest X-ray. All of these appointments are scheduled for tomorrow, but Mr. Jones has no idea where any of these offices are located. He is a SCAN member but does not want to use up all his free rides for the year. However, he can ask his best friend, Jimmy, to take him. They still need directions. What should we do?

2. Staff Participation:

Your job is to draw them a map with directions to the pharmacy, lab and radiology, which are located within close radius to your office.

Assign your staff to design directions, which can be done individually or in a small group. Then have them present the "map" at the end of the of the presentation. Allocate about 10-15 minutes for this activity. They may have to use their computers to locate those facilities.

As an incentive for the best and most helpful instructions, which you can keep and use for real life patients, provide the staff members with either gift cards or a Grub Hub certificate for lunch. It is always best to select something that you know your staff would enjoy.

Incentives make the activity a bit more competitive and truly engages the attendees.

Generic Activities: Brainstorming Activity

Instructions: Brainstorming

Purpose: Encourage new ideas, new ways of doing things, and being creative or thinking “outside of the box”.

1. Facilitator Role

- Define your problem, issue or challenge
- Give a time limit or idea limit
- Encourage everyone to participate
- Record ideas
 - Be brief, but try to use participant’s words
 - Put a check mark when ideas are repeated

2. Brainstorming Rules

- Shout out ideas quickly
- Think fast; reflect later.
 - Keep ideas short and simple
 - The more ideas, the more potential solutions
- No discussion during brainstorm ... ideas only
 - No criticizing, arguing, agreeing or evaluating.... No discussion
- Hitchhiking – build on other ideas for inspiration to create new ideas

3. Concluding the Brainstorm

- Facilitator:
 - Reads the list of ideas
 - Ask if there are any additions or corrections
- Group:
 - Chooses the top 3 – 5 ideas
- Facilitator:
 - Make sure everyone participates
 - Circles the top ideas

Generic Activities: Discussion Groups

Instructions: Discussion Groups

1. Be inclusive
 - Allow individual introductions
 - Share objectives, expectations or intentions of the discussion
 - Get clarification, if needed, on participant questions or comments.
 - Treat participants with respect and consideration.
 - Give time for participants to gather their thoughts and contribute to discussions.
 - Provide opportunities for participants to pair-share.
2. Discussions should be constructive and positive
 - Establish ground rules
 - Try to keep the group on task without rushing them
 - If the group starts to veer in the direction of negativity and/or pointless venting, ask them how they would like to address this
 - Step back when a group is functional/functioning – help participants become independent learners; take control of their learning
3. Encourage participation
 - Capture participants' comments on a whiteboard
 - Ask follow-up questions, and paraphrase comments for all to think about
 - Incorporate previous contributions into the conversation
 - Encouraging others to add their reactions or ideas to build on someone's comment.
 - It's okay if you don't know – invite others to provide resources
 - Discomfort and silence are ok; it allows participants time to think

Generic Activities: Case Study

Instructions for drafting a Case Study:

1. Introduction
 - Identify the key problems and issues in the case study.
 - Formulate and include a thesis statement, summarizing the outcome of your analysis in 1–2 sentences.
2. Background
 - Set the scene: background information, relevant facts, and the most important issues.
 - Demonstrate that you have researched the problems in this case study.
3. Alternatives
 - Outline possible alternatives (not necessarily all of them)
 - Explain why alternatives were rejected
 - Constraints/reasons
 - Why are alternatives not possible at this time?
4. Proposed Solution
 - Provide one specific and realistic solution
 - Explain why this solution was chosen
 - Support this solution with solid evidence
 - Concepts from class (text readings, discussions, lectures)
 - Outside research
 - Personal experience (anecdotes)
5. Recommendations
 - Determine and discuss specific strategies for accomplishing the proposed solution.
 - If applicable, recommend further action to resolve some of the issues
 - What should be done and who should do it?