

GUIDE

The Pen and Paper Problem in Home Health and Hospice

By Medbridge



Overview

Ever since Hippocrates put pen to papyrus in the 5th century BC, written medical records have been a part of our lives. But 2,000 years later, many agencies are still managing a large portion of onboarding on pen and paper. This leads to substantial risk from a compliance perspective, as well as issues with scalability as your home health organization grows over time. And because home health care is one of the fastest growing sectors, the volume of onboarding, training, and compliance records will only be increasing in the future.

IN THIS GUIDE WE'LL COVER:

- The risks to compliance and security that pen and paper processes can cause
- How digital solutions like learning management systems and digital skills training can solve the pen and paper problem
- How Medbridge Skills, compliance, and QAPI solutions can help your onboarding and training programs become more scalable and secure.

Table of Contents

The Pen and Paper Problem	3
The Digital Solution	5
How Medbridge Can Help.....	12
Conclusion.....	13
About Medbridge	13
References.....	13

The Pen and Paper Problem



We understand the appeal of pen and paper: It's simple, it's familiar, and you probably have a pen in your bag right now. It's customizable, portable, and implementing a more modern system can feel overwhelming when you're already busy training your staff to provide excellent care. But pen and paper or spreadsheet tracking systems are prone to human error and require a great deal of admin time and energy to maintain. These old systems slow down onboarding and make it easy to fall behind on upkeep. This puts home health and hospice organizations at risk of being out of regulatory compliance, which could cost you penalties down the line.

The Issue with Onboarding

It's an unfortunate reality that turnover in home care is high, and new nurses need to be onboarded regularly. Many home care organizations are under pressure to get new hires in the field faster with the skills they need to succeed, while still keeping them engaged and satisfied over the long term. But onboarding in a traditional live classroom setting is inefficient, time-consuming, and can quickly become unsustainable as organizations grow.

Additionally, pen and paper tracking gives you no visibility into how long the onboarding process really takes and no insight into planning for upcoming capacity or process improvement. It's also fragile: Participating in the program is entirely dependent on an individual having the original paper copies of a record. If they forget them or they're lost or damaged, the records are gone and they have no choice but to start over or they can't continue onboarding until they're found.

Compliance and the Dreaded Survey

One of the biggest problems with pen and paper record keeping can come up during survey, when providers are inspected to ensure compliance with regulations and standards. You think you have everything all sewn up, but the surveyor pulls on a loose thread and the whole thing unravels! They ask to see records of mandatory annual training. No problem, Beth always kept track of training—but wait, Beth left for another role two months ago. Where did she keep that documentation?

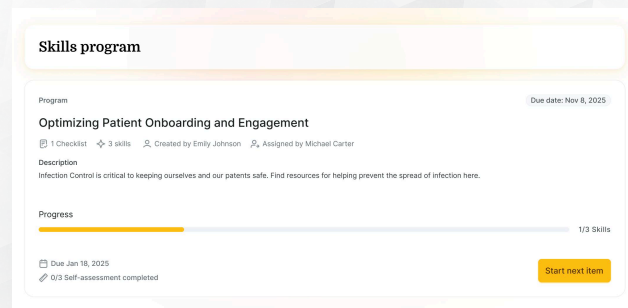
Suddenly you're left scrambling to track down the required information, adding more stress to an already stressful process.

There are also security concerns with pen and paper record documentation. It's easier to falsify, or misuse paper documentation. Nobody ever wants to think of that happening at their organization, but as businesses grow and branches get further from oversight and accountability, the pressure to hit performance targets and timelines can overcome honest record keeping.

Balancing Scalability and Consistency

According to the Bureau of Labor Statistics, home health care employment is expected to grow by 25 percent over the next ten years,¹ making home health one of the fastest growing sectors in not only healthcare, but any industry. With new nurses coming into the fold every day, pen and paper processes put a strain on organizations, making it challenging to grow in sustainable ways while crucially maintaining consistency.

The Digital Solution



The pen and paper problem is challenging, and it's only going to be more difficult to fix the longer we kick the can down the road. Luckily there is something that agencies can do today to help ease these issues and future-proof their organization for years to come: leveraging digital solutions.

While remapping your processes to function in our digital world may sound daunting, you may already be using some today—like online learning management systems. And other new innovations, like digital skills training and management systems, are opening up new frontiers, enhancing onboarding and compliance in scalable ways. Here's a look at how these digital solutions and more can help.

The Digital Solution to Onboarding

Migrating from a pen-and-paper skill assessment system to a digital platform improves visibility and optimization of the entire onboarding process. To improve your onboarding, you're going to want an end-to-end solution for onboarding and training integrated with an online learning management system.

The advantage over pen and paper is that an LMS will help streamline and standardize staff education initiatives while also providing an administrative platform for managing, delivering, and tracking a variety of content types.

Using a digital skills training and management system within the LMS, new hires can automatically be assigned an online self assessment, customized to the skills crucial for employees at your agency. Assigned preceptors can then review the assessment, identify skill gaps, and create a personalized and targeted training plan to bring staff up to speed quickly and efficiently and get them into the field faster with the skills they need to succeed. And because the digital training is standardized, you know that your staff is getting the same high quality of instruction every time.

Finally, you can track onboarding progress and collect and report on analytic data to identify gaps in training or skill aptitude, as well as monitor progress goals in assigned training programs. This can be used to not only seamlessly deliver necessary training, but also monitor and maintain program adherence.

Does it work? After partnering with Medbridge, one home health organization **reduced onboarding expenses by 11.5%** for home health nurses and shortened onboarding time by seven days. Plus, 100% of the staff who were trained using Medbridge skills and courses reported that the quality of onboarding training they received was good or excellent.

Skills Training

Skills Admin

Build the program:

- Build a new program and start adding skills with just a few clicks.

Create skills and add learning resources:

- Easily add Medbridge content, microlearning, and education, or create your own courses and quizzes. Adding each skill automatically creates a self-assessment survey to assist in evaluation.

Assign to students and preceptors:

- Automatic and bulk assignment functionality streamlines assessment for preceptors and students.

Individual Student

Receive assignment:

- Skills assignment automatically shows up on the dashboard with a 'student view' of the program.

Complete self-assessment:

- Self assessments are coupled with each assigned skill, helping to keep everything organized.

Learn skills:

- Each skill is packaged with resources assigned by the admin during the program creation process.

Preceptor

Receive student assignment:

- The preceptor dashboard includes a list of all assigned students organized by role in the organization, including self-assessment, due dates, completion status, and more.

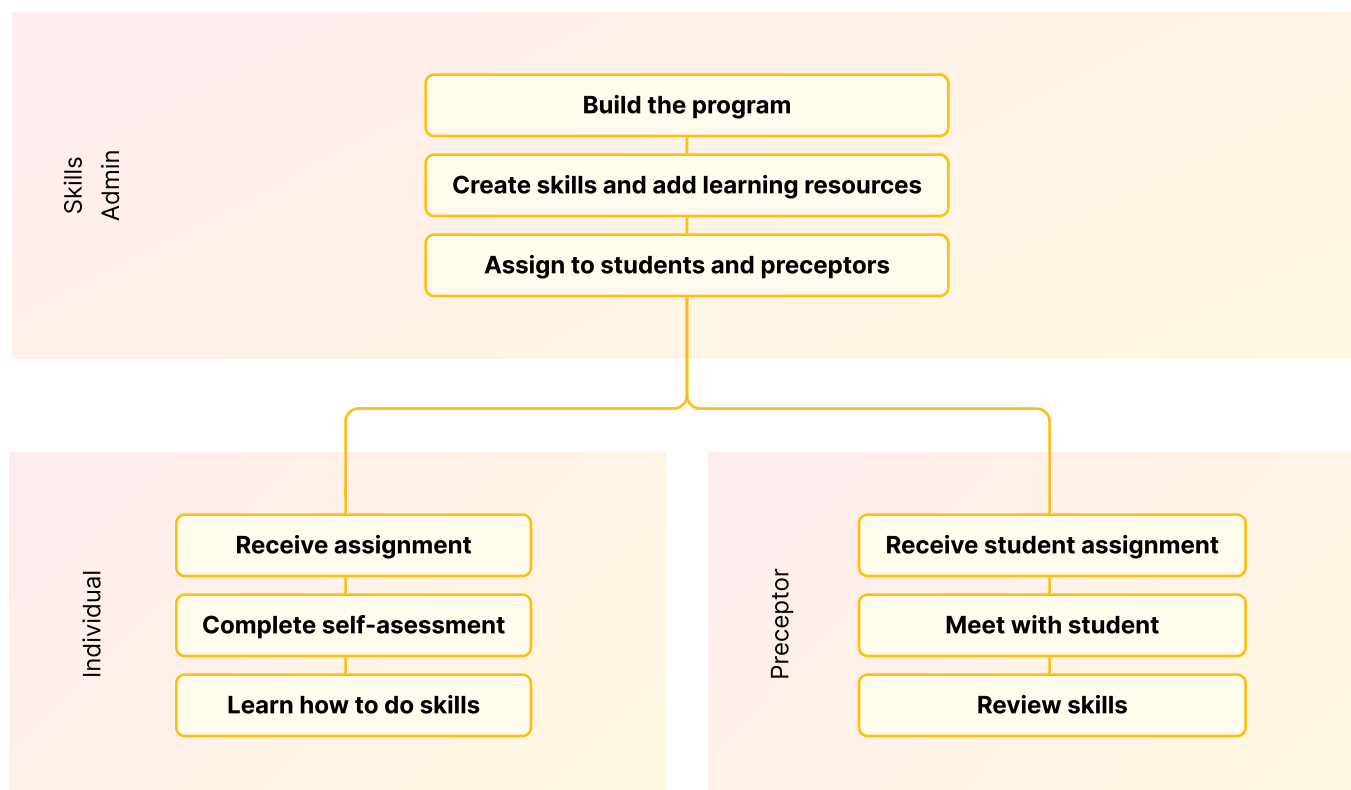
Meet with student:

- Bookmarked clinicians list helps preceptors organize students they're working with one-on-one.

Review skills:

- Preceptors can bulk review student skills and self-assessment from the dashboard and sign off on skills in as little as one click, optimizing accuracy and speed.

Skills Workflow



More about skills

Skills are entirely custom. When it comes to clinical training, every organization has its own priorities. That's why skills are entirely custom. You define which competencies matter most, and they'll appear on the final transcript along with an optional description for added clarity. A good place to start is by recreating your existing paper checklists.

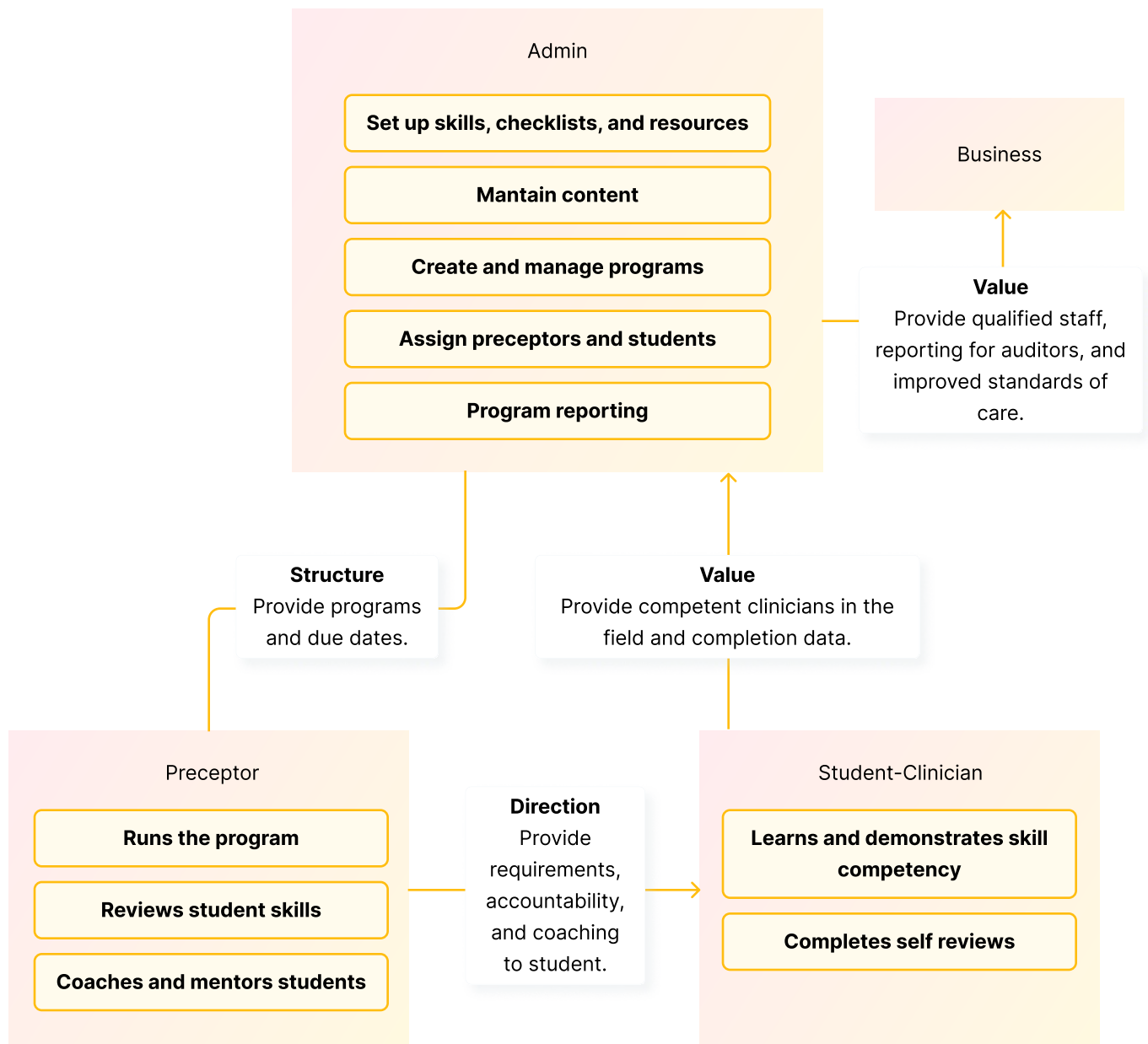
Creating new custom skills may seem intimidating. There are a lot of clinical skills to assess.

Here are two recommended ways to approach it.

- 1. What do auditors need to see on the transcript?** Create these skills and guarantee that you have the records you need to pass an audit.
- 2. What do you want preceptors and students to focus on?** Preceptors and students will spend time working on each skill. Emphasize the specialties or protocols that make patient care at your organization unique.

Resources help learn the skill. You can use Medbridge content from industry experts, like our microlearning or skills training, or upload your own content to teach to your standards.

Skills User Relationships



Maintaining Compliance and Surviving the Survey

Managing mandatory annual training to maintain compliance can be challenging and time consuming. It requires you to manage who needs which compliance course, not to mention tracking completions and adherence. With an LMS, that information is on a centralized database regardless of whether your ‘Beth’ is still with the agency or not. This will enhance your ability to adhere to state, federal, and accreditation requirements, and avoid deficiencies. These courses can be used individually or as part of individualized education tracks for onboarding and ongoing training. If a particular staff member is struggling in an area, courses can be assigned to improve knowledge and application of skills.

Then there’s the matter of the dreaded survey. We’re not going to pretend that survey is suddenly going to become a day at the beach, but with a digital record of your compliance and training, you won’t be left scrambling to track everything down.

If the worst should happen and deficiencies are cited, you’ll need to create a plan of correction. But because you’ve been digitally tracking staff education, training, and adherence, it’s much easier to identify skill gaps and deficiencies.

You can then use the same system to assign necessary remediation training so that the deficiency is corrected, and track completions to ensure that compliance is sustained.

Designing and following a good QAPI program helps agencies improve quality and performance overall as they scale up. This results in a wide range of benefits such as improved patient care and outcomes, enhanced quality and efficiency of care, better staff satisfaction, and reduced costs.



Stay Up to Date with Survey

Training: Keep your staff current with best practices and strategies for survey success using high-quality training resources such as this two-part survey survival course series developed by Medbridge and Nancy Allen, BSN, RNC, CMC, a former surveyor:

- [Survey Survival Part 1: How to Be Prepared for Any Survey](#)
- [Survey Survival Part 2: The Survey Tasks](#)

Creating a Scalable and Consistent Solution

Whether it's onboarding, turnover, or remediation training, administrative burden is a constant concern as an organization grows. Moving onboarding and skills training online provides a streamlined format that helps new hires more easily understand the onboarding process without compromising quality and compliance standards.

By organizing the data from competency checklists effectively, organizations are able to identify the most critical skills for their patient population, and preceptors have the insight they need to better prioritize high-value training initiatives. Standardizing pathways of care with templated programs in key areas such as fall prevention, chronic conditions, and wound care creates a consistent training regimen that will grow in stride with the increased demand expected in home health care over the next ten years.

On the back end, administrators can benchmark and track time-to-productivity and other key metrics, identify areas for improvement using organizational data, and create programs to remedy skill and clinical gaps with targeted microlearning education. This training can be distributed via LMS to ensure that all clinicians are getting their requisite training and completing it on time. And because the process has been streamlined, you'll benefit from ease of access and organization of your documentation during survey.

How Medbridge Can Help



Gain more visibility into staff readiness with a digital solution that simplifies skill acquisition, evaluation, and documentation training. Medbridge Skills include:

Medbridge Skills

- **Digital Skills Checklist:** Allows you to customize training programs to focus on identified skill gaps.
- **Video-Based Skills Library:** Boost knowledge retention and master home health- and hospice-specific skills with bite-sized lessons.
- **Reporting & Analytics Dashboard:** Assign checklists, simplify preceptor assessment, and review skill acquisition and sign-off data on our user-friendly interface.

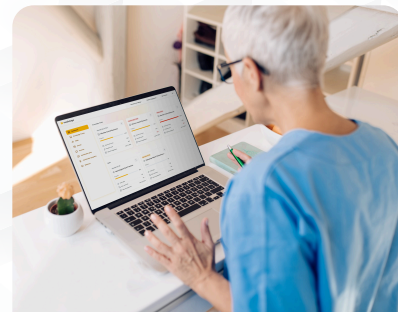
Clinical Procedure Manual

The Medbridge Clinical Procedure Manual provides clinicians with a single, reliable source of truth to ensure consistent and accurate care delivery. With tablet-ready, easily searchable procedures approved by an expert review board, the Clinical Procedure Manual helps empower clinicians at the point of care and reduce variability in clinical practices through standardized protocols.

Quality and Performance Improvement

From quality analysis to performance improvement, our dedicated Home Health Team can help you create and implement an effective QAPI program across your agency. Along with expert consultation, we offer effective, best in-class staff and patient education, patient engagement tools, and reporting and analytics capabilities for home health agencies looking to remediate areas of low performance, drive quality care, and improve outcomes. Engage patients with an easily accessible and customizable library with thousands of video exercises developed by industry professionals.

Conclusion



Pen and paper processes served us well for a long time, but they can no longer keep up in our increasingly digital world and pose an increased risk to compliance and scalability. By adopting the digital solutions discussed in this guide, you can position your organization to keep up with the increased demand on the horizon, and create a new administrative system that will stand the test of time.

About medbridge

Combining powerful digital patient care tools with the highest quality education, Medbridge is committed to making healthcare better for both providers and patients. Organizations across the care continuum use Medbridge to provide an enriched, digitally enabled experience that engages patients while streamlining and simplifying care. Designed with over a decade of insight from more than 350,000 clinicians and 25 million patients, Medbridge has helped thousands of organizations realize better patient outcomes. **[Learn more.](#)**

See how Medbridge can help your organization.

[Contact us to request a demo.](#)

1. Bureau of Labor Statistics, U.S. Department of Labor, Occupational Outlook Handbook, Home Health and Personal Care Aides, at <https://www.bls.gov/ooh/healthcare/home-health-aides-and-personal-care-aides.htm>