

SHORT PAPER

# Structured Operations Training and Evaluation: A Case Study

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## ABSTRACT

Onboarding for a company with remote, hybrid, and in-office workers can be challenging, especially if the workers are spread across the United States. This case study examines a US-based medical records company. This company met with stakeholders and developed a structured onboarding process which was implemented in December 2021. The case study follows employees who started between January and December 2022, analyzing their improvement in 30-, 60-, and 90-day assessments as well as their retention. While the data do not support a statistically significant increase, this process anecdotally improved the onboarding experience for new employees.

## KEYWORDS

onboarding, evaluation, medical records

## 1 INTRODUCTION

Onboarding employees, especially with hybrid workforces, has always been a challenging aspect for companies [1]. The COVID-19 pandemic shifted onboarding to account for an increase in remote workers [2]. This case study examines the role of a structured onboarding process and its effectiveness at improving and retaining talent.

In the medical records field, there is a space referred to as “release of information” (ROI). ROI is the transferring of medical records from one provider (e.g., hospital, clinic) to someone else. The “someone else” could be the patient, another provider, the government, or even an attorney. These requests occur regularly for patients.

Across the United States, there are many individuals who work in the ROI space. Providers and facilities sometimes have their own teams to provide ROI services. Additionally, there are dozens of vendors or business associates who offer ROI and other health information management (HIM) services to providers. The current case study reviews the new ROI employee onboarding process for a large nationwide ROI vendor.

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As background, the case study company has been in the ROI space for nearly two decades. This company has around 900 employees in 44 states. On average, this company hires around 150 new ROI employees every year. This hiring accounts for growth and churn within the company.

### 1.1 Onboarding prior to the Covid pandemic

Prior to 2020, when a new ROI employee was hired, they were provided various levels of onboarding and training. Both processes were decentralized, which allowed for great variability.

As an example, new on-site or at-a-facility employees were usually met on their first day by the team lead, manager, or regional director at that facility. That individual then would work to try to get the new employee logged in and access to the company systems, all the while juggling their other responsibilities. This meant that some new employees would go for hours or days without being able to properly get into systems.

Additionally, the team lead, manager, or regional director working with the new employee may have varying experiences in ROI. This meant that an employee in Albuquerque, New Mexico, may be trained how to do something one way, whereas another in Chicago, Illinois, was given a completely different training process. These variances would not be known because each location was independent of other locations. The company had challenges to their quality assurance and standardization processes at that time.

### 1.2 From 2020 to 2023

In 2020, the company acquired another, similar-sized company. This merger created both a centralized human resources (HR) and training department. This centralization meant that new employees would go through a structured orientation session with the corporate trainer on their first day. While it started slow and was widely accepted at first, managers soon found out this process provided them with employees who were informed about the company, had access to the email and HR systems, and were acquainted with the aspects of their job.

Near the end of 2021, ROI managers and HR met to discuss the process for onboarding new ROI team members. The plan was to create an actual onboarding process—starting from the time the new ROI team member filled out the paperwork for HR until the new member's 90th day on the job. During the initial weeks, the process was modified with additional first-week training on ROI concepts.

At present, this company's onboarding starts when the candidate completes required paperwork for their HR account. The employee's onboarding continues until their 90th day of employment. On the employee's first day, they participate in a four-hour orientation where they learn about the company, people, and policies; sign-in to the work email and HR systems; review company benefits; and complete required compliance courses.

Following Day 1, the new ROI employee participates in four training sessions that review ROI concepts, policies, procedures, and tools. All ROI employees then participate in biweekly training sessions that review new or updated policies and procedures. Additionally, new ROI employees complete three assessments—one on their 30th day, 60th day, and 90th day. The results of these assessments are passed

on with comments to their manager. Managers are encouraged to have new ROI employees retake basic ROI training again when the employee scores low on the assessments.

### 1.3 Importance of onboarding

Onboarding, which is often confused with orientation, typically involves a process involving the new employee's management team [3]. The employee learns about their role in the company, their role with their team, and the company's expectations for them.

Research has shown that up to 20% of new employees leave within the first 45 days, with about 4% leaving on or about the first day [4]. This is costly for employers. The need is great, and there are various consulting companies that specialize in helping with the onboarding planning and process.

The Society for Human Resource Management (SHRM) recommends employers be more proactive about the onboarding process [3]. This can include developing a 90-day sprint, setting up phones, desks, etc. before the first day, and providing new employees with the answers to their questions about their first day experience.

### 1.4 The current case review

The current case review examines the above process from January 1, 2022, to December 31, 2022.

## 2 METHOD

### 2.1 Participants

Between January 1, 2022, to December 31, 2022, there were 305 new ROI employees hired. From that cadre, 234 ROI employees stayed beyond their first 90 days, and 182 were still with the company as of March 1, 2023. These employees were from 30 states, with Texas ( $N = 31$ ) and Georgia ( $N = 24$ ) having the greatest representation. For the current study, we evaluated all the data from the 30-, 60-, and 90-day assessments.

### 2.2 Materials

In partnership with four ROI managers in December 2021, this company developed three measures—one for each of the 30-, 60-, and 90-day check-ins. These measures contained a 1:1 demonstration component where the new hire would need to show their skills to their manager or team lead, plus complete a multiple question survey.

The independent/question-based portion of the test was administered using Classmarker, a robust but very unassuming system available for evaluation. Data regarding participation, dates, and actual scores were obtained from this system.

For the three assessments, the 30-day measure contained 14 questions, the 60-day measure had 19 questions, and the 90-day measure had 25 questions. Some questions focused on ROI theory, while others discussed HR-based questions about logging in. A copy of the 30-day measure and 90-day measure can be found below in Figures 1 and 2, respectively.

Good morning – I hope your first 30-days at **COMPANY NAME** have been great. As part of your Onboarding, we have setup three check-ins with you. This first one is at the 30-day mark. You will receive another one at the 60- and 90-day marks. Please review and complete ASAP.

For this check-in, please complete the following 30-Day Measure: [WEBLINK](#)

Your manager is **CC'd** on this email. They will meet with you to ensure you are able to accomplish the following tasks:

- Demonstrate how to look up a request in **COMPANY SYSTEM**
- Demonstrate how to answer questions in **COMPANY SYSTEM** about a request
- Demonstrate how to select a client/transfer time and put in a Vacation request in **TIMEKEEPING SYSTEM**
- Demonstrate how to log into **COMPANY SYSTEM**
- Demonstrate how to identify the main elements of a request

Additionally, if you are On-Site, you will be asked to complete the following:

- Demonstrate how to find a request in the EMR or a shared drive
- Demonstrate how to scan a new request
- Identify the area where requests are located that have not been logged yet
- Know when and how to redirect to corporate
- Demonstrate how to understand customer service expectations in person and over the phone
- Demonstrate how to answer phones
- Demonstrate how to help walk-in patients
- Demonstrate the process for fulfilling COC requests

**Fig. 1.** A copy of the actual email sent out when an employee has been with the company for 30-days

Good morning – I hope your first 90-days at **COMPANY NAME** have been great. As part of your Onboarding, we have setup three check-ins with you. This is the last one. Please review and complete ASAP.

For this check-in, please complete the following 90-Day Measure: [WEBLINK](#)

**Fig. 2.** A copy of the email sent out when an employee reached their 90-day mark

### 2.3 Statistical plan and institutional review board

Prior to the initial implementation on or around January 2022, the product design was reviewed by the company's VP of Human Resources and the Director of Learning and Development. The latter has a Ph.D. in psychology, teaches as an adjunct in the psychology space, and serves on his university's IRB. The decision was made that we did not need to seek IRB approval since both the new employees and their managers had the option to not participate in the study at any given time and this would not reflect poorly upon them for future work.

For the statistical plan, we planned to initial run descriptive on the data, then look to see if the results of correlations between the three groups and analyses of variance (ANOVAs) would provide statistically significance.

## 3 RESULTS

### 3.1 Descriptive statistics

From the 305 potential participants, only 181 complete one or more of the assessments. The 30-day assessment was completed by 117 participants; 60-day assessment by 79; and 90-day assessment by 80 participants. See Table 1 of descriptive statistics for the tests.

**Table 1.** Descriptive statistics

	Test	Minimum	Maximum	Mean	Std. Dev.
30-Day	Score	57.1	100	82.5	10.2
	Time (minutes)	2	202	13.0	26.1
60-Day	Score	60.0	100	81.3	9.0
	Time (minutes)	3	83	11.3	10.9
90-Day	Score	57.1	100	81.5	9.5
	Time (minutes)	4	1127	35.9	106.7

### 3.2 Analyses

I ran a Repeated Measures ANOVA to determine if there was an overall significant difference between the means at the three different time points. The scores of the ROI measure at the 30-, 60-, and 90-day time points were not significantly different:  $F(1.97,139.49) = 2.44$ ,  $p = 0.092$ . I then separated the data into those still employed vs. those who had terminated, but both these values were not significant:  $F(1.93,109.87) = 2.40$ ,  $p = 0.098$ , and  $F(1.83,23.77) = 0.45$ ,  $p = 0.625$ .

Next, I ran ANOVAs to examine if the time (in minutes) and score (percent) of the three tests were related to the participant's status (employed as of December 31, 2022, or not). I found time was significantly related to the employment for only the 60-day measure:  $F(1,109) = 8.58$ ,  $p = 0.004$ . I also found the time was significantly related to the percentage for the 90-day measure:  $F(1,123) = 4.73$ ,  $p = 0.031$ .

## 4 DISCUSSION

The current case study examines the effectiveness of a structured onboarding process in relation to the scores on a baseline measure and retention. While the data do not show a significant relationship in any analysis, anecdotally, managers have specifically mentioned an increase in productivity and accuracy when following this program.

Remote or hybrid workforces provide unique challenges to companies. Onboarding often lacks standardization and compliance. Establishing and following a structured onboarding process can help to reduce turnover within the first few days or weeks of employment. These programs show the employee that there was a plan for them.

In most industries, compliance is a key component of an onboarding program. New employees must complete required training on policies and procedures. Companies that lack standardized onboarding processes may find inconsistency in their employees' skillsets. This was certainly true before 2020 for the above case study. Prior to the standardization, onboarding was the "wild west." Now, the programs in place ensure that basic compliance standards are maintained.

While there are numerous approaches to onboarding, the above case study and other research has established it is imperative for companies to have a program.

## 5 REFERENCES

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