

**Policy CA 5**  
**California Department of Health Services Policies & Procedures**  
**Training Guidelines**

**OBJECTIVE:**

To ensure that all patients receive safe and competent service by knowledgeable and well trained professionals.

**PROCEDURES:**

**Patient/Caregivers**

Patients/caregivers shall be instructed according to their level of understanding and in a form they can reasonably understand.

Patients/Customers of The Company shall be provided with product literature and/or written information about the equipment when the safe operation of the home medical device requires understanding beyond that which can be briefly communicated or demonstrated at the time of the initial set-up.

The Company's personnel shall provide information at a level understood by the patient/caregiver. Return demonstration shall be requested to assess the customer's competence and understanding. Documentation shall be noted either by signature on the delivery Invoice and/or Instruction checklist which shall be maintained in the patients file.

The instructional process, which shall be used for patient/caregiver instruction, shall include the following:

1. written instructions,
2. verbal explanations,
3. illustrations,
4. demonstration by personnel and
5. return demonstration by customers.

**Exemptee and other Employees**

All staff shall be oriented to company policies and procedures prior to assuming responsibilities. The orientation activities that may also include home medical devices shall be documented in the employee's personnel file.

1. All areas of the orientation shall be reviewed and appropriate instruction noted and checked, including any comments.
2. All personnel who provide home medical services shall:
  - be knowledgeable of the home medical device and its operation;
  - understand the electrical requirements of the device;

- be knowledgeable of the safety requirements;
- understand the distribution process and documentation requirements, and
- be able to instruct the patient and/or responsible caregiver regarding use of equipment;

After this orientation period the company can then evaluate the employee's competence in performing the job.

#### Exemptee Training

An exemptee shall undergo the State approved training program to include the following areas:

1. State and Federal laws relating to the distribution of dangerous drugs and devices
2. State and Federal laws relating to the distribution of controlled substances
3. the United States Pharmacopoeia standards relating to the safe storage and handling of drugs
4. the safe storage and handling of home medical devices;
5. prescription terminology, abbreviations, and format

After completion of the above training program the exemptees will be eligible to apply for Certification with the Department of Health Services.

#### In-service and Ongoing education

In-service or learning experiences shall be provided for the purpose of assisting staff to perform their assigned duties. Orientation and product demonstrations shall also be included within, this category. Exemptee will have ongoing training.

The following are topics that may be employed in ongoing education of staff on a periodic basis:

- Basic Home Safety
- Safe Use of Equipment
- Storage of Devices
- Product Recall
- Infection Control Procedure
- QI Plan/Findings; effectiveness of HMDR processes
- New Equipment

Periodically the Company shall perform following steps:

- a. Meet for informal performance discussions.
- b. identify strengths and weaknesses of the employee.
- c. Praise positive performance.
- d. Counsel the employee on how he/she can improve performance in unsatisfactory areas by giving specific goals and time frames for improvement.
- e. Perform a competency review of the employee to ensure understanding and adherence to company policies and processes.