Case Management Monthly

Director's desk: Establishing a successful mentoring program

by Peggy Rossi, BSN, MPA, CCM

How many of us have a successful mentoring program established in our organization and department? For most organizations, I would venture to say mentoring is performed on a piecemeal basis and is likely not as effective as it could be. Far too often, mentoring efforts are disorganized and lack a dedicated trainer. If any training is given, it often consists of the same general orientation afforded to all new employees, regardless of the job they will be doing.

Hospital case management tasks are unique and are not typically associated with general patient care. Case management tasks are a combination of those related to utilization management and discharge planning, both of which are critical elements for a hospital's financial success and compliance with Medicare's *Conditions of Participation*. A mentoring and training program must be designed to ensure any newly hired staff members fully understand the basic laws, compliance nuances, and complexities of the job.

Why is a solid mentoring program needed for newly hired case managers? First of all, healthcare is an ever-changing environment with mandated federal and state regulations and patients' medical needs are increasingly complex, especially when it comes to developing a safe and sustainable discharge plan. We are faced with new hospital directives coming at us on a regular basis as they relate to correct patient classification, length of stay, readmissions, and compliance. Thus, as we bring on new staff, we must ensure they learn to do the job the right way to avoid developing bad habits. When a solid mentoring program is not in place, new employees are not assigned to a designated mentor but are haphazardly assigned to whoever is free for the day.

A good mentoring program allows for the development of the new employee's skills in a safe and controlled environment. As the mentoring program is developed, it is critical the program agenda teaches up-to-date information and is flexible enough to accommodate the various styles of learning (i.e., visual learner vs. auditory learner vs. kinetics learner). Remember, adult learners generally:

- Come to the learning experience with a rich collection of past experiences (and at times some bad habits)
- Want the training to "make sense" and the new skills to be practical
- Want to use new skills immediately
- Take errors personally

To ensure mentoring has a long-term impact, provide the employee with written procedures to follow. The mentoring effort should also allow adequate time each day to recap the learning experience and share feedback, which must be given immediately and consistently throughout the period of time allowed for learning. Feedback helps minimize the negative effects of errors that may arise during the learning and participation processes.

The program should have simple and clear instructions that are addressed at a pace that is conducive to learning. Equally as important, the program must be both problem centered and goal oriented. It should move from the simple to more complex tasks so the new employee feels that he or she can tackle the complexities of the job. A good mentoring program must leave a positive impact on the new staff member so he or she completes the program with an increased sense of belonging. Good mentoring should not only contribute to a person's personal satisfaction, professional growth, and retention, but ultimately to an organization's success.

Editor's note: Rossi is senior trainer and auditor for CA Health and Wellness and a consulting associate for the Center for Case Management in Wellesley, Massachusetts.

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