



**NEW HIRE TRAINING CHECKLIST**

Name: ABAO, TERESA WAPY  
 Account: NY  
 LOB: Intake  
 Team Lead:

Day 1					
PPT	Welcome to iPlay	iPlay Presentation Introducing Who is iPlay, history of the company.	07/18/16	Michelle Pasco	}
PPT	What We Do	Ocean Home Health Presentation.	07/18/16	Michelle Pasco	
LEADER LED / Best Brand site	Website Navigation	Ocean Home Health Website.	07/18/16	Michelle Pasco	
FLOOR	Production Floor	To get the trainees the feel of the office and the staff that they are going to be working with.	07/18/16	Michelle Pasco	
LEADER LED	Debrief Floor Tour		07/18/16	Michelle Pasco	
PPT	Who We Are	Ocean Home Health Presentation.	07/18/16	Michelle Pasco	}
REVIEW ACTIVITY	TOSS THE BALL	Trainer reviews Ocean Home Health website with activity.	07/18/16	Michelle Pasco	
PPT	Customer Service 101	Introduction on how to become a better CSR	07/18/16	Michelle Pasco	

ACTIVITY	Trainees Expectations from the Company			07/18/16	Michelle Perora	}
REVIEW ACTIVITY	TOSS THE BALL	Trainer reviews Customer Service 101 with activity		07/18/16	Michelle Perora	
PPT QUIZ	Performance Objectives 1st Day Quiz			07/18/16	Michelle Perora	
<b>Day 2</b>						
LEADER LED	Review Previous Day			07/19/16	Michelle Perora	}
PPT/LL	Brightree	Introduces Brightree and the usage of the different tabs.		07/19/16	Michelle Perora	
REVIEW ACTIVITY	TOSS THE BALL	Trainer reviews BT with activity		07/19/16	Michelle Perora	
PPT/LL	Medicare, Medicaid and Local Insurance	Introduces the different types of Medical Insurance		07/19/16	Michelle Perora	}
PPT/LL	Medicare LCD for Bed and Surfaces			07/19/16	Michelle Perora	
PPT/LL	Medicare LCD for MRADL			07/19/16	Michelle Perora	
PPT	Insurance and Policy for NJ state.	Modules shows the different types of Insurances and policy		07/19/16	Michelle Perora	}
REVIEW ACTIVITY	TOSS THE BALL	Trainer reviews Medicare LCD's with activity		07/19/16	Michelle Perora	
Role Play	Brightree Navigation with question and answer about Medicare LCD.			07/19/16	Michelle Perora	
<b>Day 3</b>						
LEADER LED	Review Previous Day			07/20/16	Michelle Perora	}
PPT	Durable Medical Equipment 101	Module shows the different DME's that OHH carries.		07/20/16	Michelle Perora	
Activity	TOSS THE BALL	Trainer reviews DME guidelines with activity		07/20/16	Michelle Perora	

PPT	Durable Medical Equipment Guidelines	Module shows the different guidelines before the PT would be given with the requested equipment.	07/20/16	Michelle Pecora	}
Activity	Soft Skills Activity	Review on proper usage of the empathy statements as well as walking an extra mile in assisting the PT's.	07/20/16	Michelle Pecora	
PPT	Ocean Home Health Catalog Review		07/20/16	Michelle Pecora	}
	Break				
PPT	Outlook	Introduces Outlook and the different color codes to use when processing fax.	07/20/16	Michelle Pecora	}

Day 4

LEADER LED	Review Previous Day	Modules introduces to determine the PT's facesheet and order form.	07/21/16	Michelle Pecora	}
PPT	Familiarize facesheet and order form		07/21/16	Michelle Pecora	
REVIEW ACTIVITY	TOSS THE BALL	Trainer reviews how to familiarize facesheet and order form.	07/21/16	Michelle Pecora	}
PPT	How to create sales order.	Modules introduces how to create sales order on BT	07/21/16	Michelle Pecora	
	Break				}
REVIEW ACTIVITY	TOSS THE BALL	Trainer reviews how to create sales order.	07/21/16	Michelle Pecora	
QUIZ	Facesheet and how to create new sales order exam.		07/21/16	Michelle Pecora	}

Day 5

LEADER LED	Review Previous Day		07/22/16	Michelle Pecora	}

OK

PPT	Facility Training/ Doctor Referral/ Marketing Rep	Modules introduces about the importance of the Facility, Doctor Referral and Marketing Rep.	07/22/16	Michelle Perera	}	OP
REVIEW ACTIVITY	TOSS THE BALL	Training reviews about the Facility Training/ Doctor Referral and Marketing Rep.	07/22/16	Michelle Perera		
QUIZ	Facility/ Doctor/Marketing Rep Exam.		07/22/16	Michelle Perera		
PPT	How to process fax.	Modules on how to process fax step by step.	07/22/16	Michelle Perera	}	OP
LEADER LED	Review Previous Week	Modules on how to process fax step by step.	07/25/16	Michelle Perera		
PPT	How to process fax.	Break	07/25/16	Michelle Perera		
SBS	Side by Side	Allow trainees to do side by side with the tenured agents.	07/25/16	Michelle Perera	}	OP
	Review		07/25/16	Michelle Perera		

Day 6

LEADER LED	Review Previous Day	Allow trainees to do side by side with the tenured agents.	07/26/16	Michelle Perera	}	OP
SBS	Side by Side	Review on what they have learned during the SBS	07/26/16	Michelle Perera		
Activity	TOSS THE BALL	Trainees would be processing fax with the help of tenured agents/trainer.	07/26/16	Michelle Perera		

Day 7

Day 8

LEADER LED	Review Previous Day			07/27/16	Michelle Pereira	
SBS	Side by Side	Allow trainees to do side by side with the tenured agents.		07/27/16	Michelle Pereira	}
	Lunch					
Activity	TOSS THE BALL	Review on what they have learned during the SBS		07/27/16	Michelle Pereira	}
SBS	Fax Processing	Trainees would be processing fax with the help of tenured agent/trainer.		07/27/16	Michelle Pereira	
	Review			07/27/16	Michelle Pereira	

Day 9

LEADER LED	Review Previous Day			07/28/16	Michelle Pereira	
SBS	Fax Processing	Trainees would be processing fax with the help of a tenured agent/trainer.		07/28/16	Michelle Pereira	}
SBS	Fax Processing	Trainees would be processing fax with the help of a tenured agent/trainer.		07/28/16	Michelle Pereira	
Activity	Debrief			07/28/16	Michelle Pereira	

Day 10

LEADER LED	Review			07/29/16	Michelle Pereira	
Exam	Exam on how to process fax.			07/29/16	Michelle Pereira	}
	Break					
SBS	Fax Processing	Trainees would be processing fax with the help of a tenured agent/trainer.		07/29/16	Michelle Pereira	}
SBS	Fax Processing	Trainees would be processing fax with the help of a tenured agent/trainer.		07/29/16	Michelle Pereira	

I confirm that I attended the CSR Intake Training Program. I listened, read and understood the training and I understand that as an employee, it is my responsibility to abide by iPloy Inc. Policy and Procedures, in accordance with the training. If I have questions about the training materials presented by iPloy Inc. policy and procedures, I understand it is my responsibility to seek clarification from the Human Resources/Training Department.

*Abuse*  
TERESE MARIE ABAD

Signature Over Printed Name

July 30, 2016 5:30 AM

Date and Time