The Ultimate Caregiver Training Guide

A GUIDE TO BUILDING A CAREGIVER TRAINING AND ONBOARDING PROGRAM THAT REDUCES TURNOVER

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https://geoh.app

WHAT'S INSIDE

BEFORE YOU READ

About 57% of caregiver turnover in the first 90 days comes down to training and orientation — not bad hiring. That's fixable.

The seven steps here are the ones that hold up: a P&P manual that survives a survey, an orientation day worth showing up for, training people actually use, and enough check-ins to catch trouble early.

Work through it in order. Each step assumes the one before it is done.

57%

of first-90-day caregiver turnover traces back to training and orientation, not hiring.

1 Start With Your P&P Manual

Everything else in this guide — the paperwork, the training, the sign-offs — is only as good as the manual behind it. Your P&P manual is what tells staff how the agency actually runs, and it's what keeps you compliant with your state's rules.

The six sections surveyors look for

- **Administration & governance**
- **Client care**
- **Personnel**
- **Training**
- **Safety**
- **Records**

One gut check before you finalize any policy

01 Points to a specific standard

02 Has a named owner

03 Has a real procedure attached

04 Leaves a record proving it happened

05 Has a version number and review date

If you can't answer yes to all five, the policy isn't ready to publish.

2 Run a real orientation day

Orientation is day one — before a caregiver provides any care, they need to get through paperwork, the handbook, and your key policies. (Onboarding is everything after that: the weeks it takes them to actually absorb your workflows and clients. Worth treating as its own longer stage, not something you cram into day one.)

Get the paperwork out of the way first:

- I-9 form
- Offer letter
- Employee contract
- Direct deposit info
- Emergency contact info
- Client non-compete agreement
- Health insurance documents
- Employee handbook & org chart

Some states also require a drug test, or license and training verification, particularly if the caregiver will be administering medication or transporting clients. Check your state's rules rather than assuming.

Then walk through the handbook and job description in person — don't just email it over. Cover the practical stuff like PTO, then what the role actually involves day to day, and why you think they're a good fit. New hires who understand the "why" tend to stick around longer.

Finally, go over the policies caregivers need to hear directly: client rights, confidentiality, and what to do if a client asks for something outside their scope, like more hours or a schedule change. (The answer should always be "call the agency," not improvise.) Have them sign off on the ones that matter most, like clock-in and clock-out expectations — it's your proof later that the policy was actually communicated.

3 Build the Core Training Program

This is where you cover what your services actually are, and the policies that shape how caregivers deliver them. People learn differently, so mix your formats:

Hands-on practice for physical tasks like transfers

Virtual sessions, whether that's recorded video, live Zoom calls, or a training vendor

In-person sessions, which don't require an office — a co-working space or the local library works fine

Get caregivers using your home care app during training, not for the first time on their first shift.

This is also the right moment to cover EVV specifically

How to clock in and out correctly and why it matters. Point them to the EVV training already available on your state's Medicaid website, and if they're on GEOH, walk them through it directly, since that's an area where a lot of competing systems either skip training or charge extra for it.

State EVV training pages:

Illinois	Indiana	Ohio
Georgia	Missouri	North Carolina

Worth a quick check before sending these out

State Medicaid sites restructure their pages fairly often. Before you build anything from scratch, check whether your state Medicaid agency or MCO already offers required training at no cost — a surprising amount does, and duplicating it wastes time.

4 Cover Compliance and Ongoing Training

Two trainings aren't optional — and they apply to every caregiver and every admin, since caregivers are logging care in your app even if they never touch your back-end systems.

The two non-negotiables

01

HIPAA / PHI / PII

Everyone who touches client health information — which is everyone.

02

IT security

Passwords, phishing, devices. Your app is a door into client data.

Neither is one-time. Plan an annual refresher for both, or you're exposed if you're ever reviewed.

Then keep skills current

Caregivers get comfortable doing things a certain way, even when a safer method exists — a two-person transfer instead of one, for example. Keep them current as equipment and best practices change.

For anything outside your wheelhouse, send them elsewhere

CPR

The local fire department or Red Cross.

Professional development

Their provider association — it usually vets what it recommends, safer than a random vendor.

5 Get them ready for their 1st shift

In the app, before day one

- [ ] Downloaded and logged in at least 24 hours before the first shift
- [ ] Walked through a short video guide
- [ ] Availability set, so scheduling doesn't stall
- [ ] Comfortable clocking in and out and adding care notes

What they need on their first client

The care plan

Pulled up themselves, not briefed verbally.

The daily schedule

What happens, and when.

Medication timing

Which meds, what time.

Anything unusual

A compromised immune system, for example.

If a caregiver can find the answer without calling the office, you've prepped them properly.

6 Handle questions, then build the schedule around them

Before anyone sets foot in a client's home, give them a real chance to ask questions — and answer them straight. A caregiver who leaves orientation with unspoken doubts is the one who no-shows in week two.

Questions first, schedule second

01

Ask

Open the floor. What's still unclear about the client, the app, or getting paid?

02

Match

Build the schedule around the availability they gave you, not around your gaps.

03

Adjust

Life changes. Make it easy to update availability without a phone tree.

Schedule around the caregiver, not just the client

Most caregivers are juggling something — another job, school, kids, a bus route. If the shift you assign fights all of that, you'll lose them, and you'll lose the client too. Confirm the schedule while they're still in the room, and hand it to them in writing before they leave.

Confirm it in the room

Days, hours, start date — agreed out loud, not assumed.

Put it in writing

In the app, where they can check it without calling you.

A schedule that fits their life is the cheapest retention tool you have.

7 Keep checking in & keep improving the program

Most of what goes wrong shows up early, and it shows up quietly. Build the check-ins into the calendar so nobody has to remember them.

The first 90 days, checkpoint by checkpoint

Before shift 1
App ready, availability set, care plan in hand.

Same day
Call after the first shift. How did it actually go?

1 week
Client fit, hours, anything that surprised them.

1 month
Skills gaps and schedule friction, before they quit.

90 days
The retention cliff. Make this one formal.

Two things that make the check-ins work

Shadowing beats reading

Pair new caregivers with someone experienced for the first shift. Twenty minutes of watching lands better than an hour of policy.

Close the loop

When someone flags a gap, fix the training and tell them you fixed it. That's what makes them speak up the next time.

Every question a caregiver asks is free feedback on your training program.

8 What to do next

You don't have to build all seven steps this quarter. Pick the one that's costing you caregivers right now and fix that first.

1 Check what you already have

Pull your P&P manual and your orientation packet. Run the five-point check on page 3. Anything that can't produce a record isn't really a policy yet.

2 Fix the one step that's leaking people

Ask your last five hires where they felt lost. Whichever step they name is the one to rebuild — not the one that's easiest to write.

3 Put the check-ins on the calendar

Same day, one week, one month, 90 days. If they aren't scheduled, they won't happen once you get busy — and you will get busy.

Training isn't a cost of hiring. It's the reason you stop re-hiring for the same position.

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THANKS FOR READING!

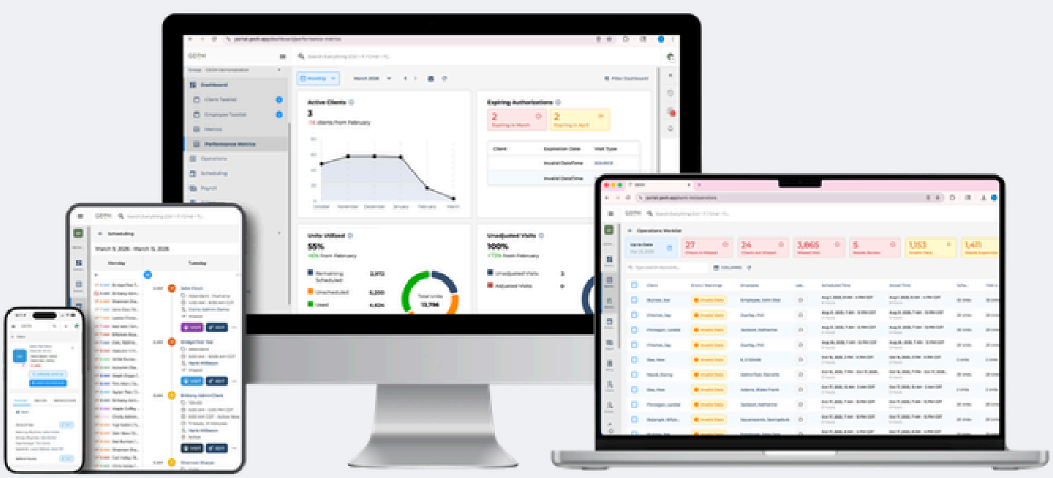
We hope you found this guide helpful!

If questions come up along the way, our team works with agencies like yours every day and is happy to help you work through the details.

Ready to see what GEOH can do for your agency?

Book a Meeting!

Call (317) 455-3218



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