

SO YOU'VE BEEN PUT IN CHARGE OF TRAINING...NOW WHAT?

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The system is built, and you have the awesome job of training everyone in the facility to use it. Wow! At first glance, this is an overwhelming assignment, but sitting down to draw up a game plan will help to put it in perspective. Hopefully you have been involved in system design discussions, and even participated in integrated testing so that you understand the system as designed for your facility inside and out. Perhaps you have even created the training database or computer-based materials...all these activities will make it easier to select an approach and design a training system to meet the needs of all end users in your facility.

Available literature on training of adults suggests that adults generally learn what they have a need for at the time, and have a preferred learning style - auditory, visual, written or tactile. Since most adults have a mix of preferences, not only do you have to prepare a class, it must appeal to all types of learners. The type of material being taught will help to guide the approach. Since you will be training end users on the new computer system, it makes sense that a great deal of the class will be spent with "hands on" scenarios. So...how do I set up my training program to achieve my desired results? If you are fairly new to the training role, especially for a project of this scope, I offer the following suggestions:

- **Identify the scope of your training program**

Are you phasing in the application based on functionality? If so, how many classes do you anticipate for each role type? What is the progression from class to class? Will you train super users and assistant trainers? What about physicians? ancillary staff? A matrix design works well in helping to identify who needs what class and in what order. You will also need to identify the types of training materials which will be employed. Will you have only classroom training? Or will you provide access to a practice database for staff? Can staff complete a self-learning module in lieu of class attendance?

- **Identify the content and length of each class**

Keep in mind that some class content, like that for Results view and Patient lists, may be designed as "vanilla" for all end users, while Orders generally requires customization for departments and role types. Use your objectives to guide the class content, including lots of hands on practice, and have discussions with management on class length. Adults learn best in short sessions (they don't sit very well), but 4, or even 8 hour sessions may be easier for managers to cover. The length of the training effort and number of staff to train will also impact class length. Ideally training is offered 2-3 weeks prior to an area's go live. You can use a formula to determine how many classes are needed:

Number of staff to be trained

slots per class x # of classes per day = number of classes needed

Will training be done outside the classroom? If so, for what groups and under what circumstances? Where? How will you ensure consistency of content presentation? Will you require skill validation? When? Be sure to obtain feedback from each class and make changes as needed to enhance learning. Also, many staff tend to be computer challenged, so you may need to pre-screen, or provide

remedial training so they don't hold back the entire class during your training session.

- **Identify class schedules**

On what days and times will training occur? Don't forget about the night and weekend staff. In my experience, night staff prefer to attend a short class prior to the start of their shift or on a day off – attending after night shift should be discouraged. Longer classes require attendance on a day off if at all possible. Be sure to keep in mind the organization's preference for paying extra time vs attending only on work time, and make those adjustments to your plan.

- **Identify class logistics**

How many training rooms are available? How large are they? For hands on classes, a trainer ideally should have no more than 10 participants, preferably with a helper– a second trainer (or superuser) should be added for a larger class. Who will be responsible for ensuring working hardware and software? How will participants be scheduled? Do you have an LMS (Learning Management System like Net Learning) which allows staff to register for a class? This is by far the easiest way to plan and schedule classes. Will you allow drop-in staff (without registration)? What is the minimum number required to hold a class? How will you track attendance? What kind of reports will you send to management and how often? What about no shows? Will you have classroom-only training materials, or something for staff to write on and take away? Who will prepare and Xerox the materials? What kind of publicity will you do? How will staff clock in for class time, and who pays for it?

- **Inform and obtain buy-in from management**

The best training plan in the world will fail miserably without management support. Staff have to attend class in order to learn the system, and managers have to support the effort through scheduling accommodation. You also need their understanding and “approval” of the entire training plan, and their recommendations regarding personnel issues related to the classroom. If you have elected to use super users or assistant trainers, they most likely will have regular staff jobs – and will need manager approval to assist you with training efforts.

Hopefully this brief overview will help you get started planning your training program. Many resources are available to assist you, from Eclipsys manuals and consultants to discussions with other users via phone or list serv. Planning helps everyone “see the big picture” and identify a comprehensive approach to your training. Use of the new computer system is a measure of project success, and appropriate and adequate training will provide the end user with tools needed to be successful.

Part 1 of this article discussed a “game plan” for designing a training program for Sunrise Clinical Manager, including identification of training scope, content and length of classes, schedules, logistics and management buy-in to achieve success. This article continues the discussion with sample class outlines for Nursing and Ancillary staff participants (in this case Respiratory Therapy) who have already attend a 1 1/2 hour Results and Patient Lists class. You might adjust the times for each topic based on your audience, re-order the agenda, or break it into smaller, more frequent sessions based on your training plan. The goal of the class is to demonstrate advanced system functionality and provide guided practice for

participants. No one will leave the class an expert – only hands-on use will provide that expertise.

Sample outline for Order Entry/Worklists class, Nursing, 6 hours

Objectives:

- Recall screen navigation and system functionality
- Demonstrate data entry of Patient info tab items, such as allergies, height & weight, comments and significant events
- Discuss and demonstrate basic electronic ordering functions and order management for use in planning and providing patient care
- Document patient care on and maintain simple flowsheets
- Document task completion on and maintain worklists
- Demonstrate mastery of content via completion of specified scenarios

Sample Agenda

8:00	Welcome and review of Objectives and Agenda
8:15	Review of basic system functionality Entering and maintaining patient information
9:00	Introduction to electronic Order entry
10:00	Break
10:15	Order review tab, filters and order maintenance
11:30	Introduction to Flowsheets and worklists
12:30	Break
12:45	Printing and downtime considerations
1:00	Proficiency Exercises Course evaluation
2:00	Adjourn

Sample outline for Order Entry/Worklists class, Respiratory Therapy staff, 3 hours

Objectives:

- Recall screen navigation and system functionality
- Discuss and demonstrate basic electronic ordering and order management functions for use in planning and providing patient care
- Locate information on flowsheets and worklists
- Demonstrate mastery of content via completion of specified scenarios

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