

Sacramento County

Department of Health & Human Services

DBHS

SacHIE END-USER TRAINING PLAN

Document Revision History

DATE	NAME	EDIT DESCRIPTION
7/1/2012	Christine Giri	Initial Draft
7/17/2012	Kacey Vencill	Formatting edits
8/1/2012	Christine Giri	Accepted Edits T. Bennett
8/1/2012	Kacey Vencill	Added Agreed upon edits, Added Watermark, added link to training schedule.
8/14/2012	Christine Giri	Added On-Call Staff section
8/21/2012	Christine Giri	Added Auditing Training Classes
8/31/2012	Christine Giri	Training Session Registration Timelines
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Introduction

Avatar is the electronic system that allows the Sacramento Division of Behavioral Health Services to maintain service, treatment, eligibility and demographic information for those in the Mental Health and Alcohol and Drug systems.

The project in Sacramento that incorporates Avatar is known as Sacramento Health Information Exchange (SacHIE). SacHIE involves the implementation of a new, secure and certified, interoperable electronic health record system that includes electronic prescribing, laboratory ordering and results delivery, treatment and assessment plan automation, and connectivity to a personal health record.

These technologies will support services through better data sharing and client and family member access to services. The Avatar application is accessible over the internet.

The intended outcome of the training phase of the project is to ensure that all Avatar users (End-Users) are provided a high quality, sustainable training program that supports the provision of quality care.

List of Acronyms

SacHIE – Sacramento Health Information Exchange
PM – Practice Management
CWS – Clinical Work Station

Goal

The primary goal of the End-User Training Plan is to define the necessary steps for the development and deployment of a training program to support the successful implementation of SacHIE. The training plan for the End-user community will ensure that both Sac County personnel and Contracted Providers using the system are provided the opportunity to receive the highest quality training to effectively perform their duties.

Objectives

The primary objective of the End-User Training Plan is to ensure that County and Contracted personnel receive the training, knowledge and skills necessary to successfully implement and sustain the SachIE Project.

Additional objectives include:

- Create and implement an End-User training program that's effective, timely and tailored to the tasks that personnel will perform.
- Create a sustainable training program that meets both initial and long-term End-User needs. Initial and long-term needs include post go-live support, refresher and new hire training, all offered through either in-person or on-line training formats.

Scope

Training is for County and Contracted staff who provide or support the delivery of services to Sacramento County clients through either the mental health or alcohol and drug components of the Behavioral Health Services Division. It includes initial and refresher training on PM, CWS, Document Management and Order Connect. Training will allow End-Users to be able to complete tasks associated with their jobs, but will not replace other training intended to teach them the scope of their jobs. There will be areas of training that may not pertain to each attendee due to the diversity of Procedural and Policy questions will not be addressed in the training, but rather attendees will be directed to their management.

Needs and Skills Analysis

The target audience will be Medical Staff, Clinicians, Administrative Staff and Other Services Staff, to be identified by the Program Liaison. In addition, computer skill level is broken down within each program. Each module includes more time for those with less initial computer familiarity in order to allow for more instruction, examples and practice time. Depending on the numbers of each Go Live group, system components to be trained (CWS, Order Connect & Document Management), and computer skill levels, the modules will be scheduled accordingly.

Methodologies

Methodology	Capacity	Location	Resources
Classroom Training	30	9333 Tech Center	2 Trainers/1 Proctor when at full capacity (2 training Rooms). One additional Proctor for groups with next to no computer skills.
Live Online Training	100	WebEx	1 Trainer
On-Demand Recorded Webinar	Unlimited	WebEx	Self-Administered

Classroom Training – the most effective training, specifically for those who have less comfort with computers. Required for all first time Avatar users.

Live Online Training – recommended for those very comfortable learning new systems or those taking the module for a second time to refresh their skills.

On-Demand Recorded Webinar – only recommended for those taking a refresher course. Can be taken anytime.

Class Schedules

The following class schedules are posted on the DHHS Avatar Project Website at the following link to allow for easy reference when scheduling staff.

http://www.dhhs.saccounty.net/BHS/Avatar/Documents/RL_Avatar_Train_GOLIVE.pdf

Ongoing Training Classes

PM Basics		X							
Read Only/Reports/State Reporting									
Data Entry 1 day									
PM Adv. Billing 2 hrs.			X						
CWS 1 day							X		
CWS Webinar 1 day									X
Group Notes 1 hr.									X
Order Connect Non Prescribers 2 hrs.								X	
Order Connect Prescribers 3 hrs.								X	
Document Mgmt 1 hr.									X
Scheduling 2 hrs.									X
Drop In PM 2 hrs.							X		
Drop In CWS 2 hrs.									X
County Trainers 1 hr.								X	

PM End-Users can drop in once a month for individual help with PM
 CWS End-Users can drop in twice a month for individual help with CWS

Training Session Registration Timelines

Please complete the Avatar Account/Training Registration form at least **30 days** prior to your agency's scheduled training start date. Please include the training sessions your staff will be attending. If your staff require an alternative scheduling option (e.g. staff only work on days training is not offered), please provide that information **45 days** in advance. This allows the Avatar Implementation Team to make arrangements with enough lead time to accommodate training needs without delaying the schedule.

Programs Using Their Own EHR System

Programs using their own system will be trained on how to exchange their health information with the county. A separate guide will be developed for that phase of implementation.

Training Coordinator

Responsibilities

- Develop Training Plan
- Develop training curriculum & materials
- Provide Training Oversight
- Responsible for County/Provider logistics & training coordination
- Observe Training
- Provide training status updates to Project Manager
- Evaluate feedback with Trainers and Implementation Team to develop solutions to issues that arise
- Oversee Training Material and Production
- Coordinate Training the Trainers

Trainers

Responsibilities

- Deliver training program content in physical classroom settings and online virtual classroom, providing creative, effective instruction.
- Manage classroom environment, analyze results and identify gaps in training needs.
- Provide a positive, active learning environment for participants.
- Participate in training material development as needed
- Contribute to the design of exercises, instructional activities and training assessments that reinforce learning where needed.
- Contribute to the overall success of the Training group by identifying ways to continuously improve the learning process
- Handle classroom and materials preparation
- Provide email and phone support for end-users
- Provide on-site support for end-users

Training Delivery Logistics

- Registration Database Administration to track attendees and the modules they have completed.
- Training Administration
- End-user Identification and Scheduling
- Training Room Requirements - includes verifying equipment is in working order.
- Instructor Identification and Scheduling
- Delivery and Logistics Support
- Contingency Planning
- Maintain database from Help Desk calls and emails to track possible gaps in training.

Major Milestones/Deliverables and Timeline

Milestones	Date
Survey Monkey Sent to Providers	5/2
Survey Monkey responses returned	5/3-7/2
Post Trainer Job on Internet	5/23
Trainer Start Date	7/5
Training/Go Live Schedule Complete	7/5
Training Plan Complete	7/6
Draft Training Plan Approved-Internal	7/23
Training Plan Approved-External	8/6/12
Curriculum Developed	7/26
Trainer Training Complete	8/1
End-user training begins	8/12
QM Trainers identified	4/1/13
Training QM trainers complete	5/15/13
End-User training completed	5/31/13

Guides

Trainer Guides – will be a map of the course that lists all concepts to be taught, and the specific system functions to be taught, highlighting the key points. The training guides provide a consistency of training across locations, times and trainers.

End-user Guides - Documentation is built into the Avatar system with **Help Screens**, **Light Bulbs** and **Online Documentation**. In contrast to using printed documentation, keeping the information on-line ensures the most current information is available. End-Users will be notified of changes in the

system through the **Message Center** widget. Supplemental material will be posted to the project website.

Sustainable Training

Because staffing is very dynamic, a sustainable training program must contain several features. These include ongoing training for new hires training for system updates, refresher training for existing staff, all of this in addition to providing ongoing support.

Initially, these services will be provided by the Avatar Implementation Team trainers. By April/May of 2013 the training will transition to county staff.

Auditing Training Classes

Agencies may choose to have 1-2 additional staff audit each class during the two weeks that their staff is being trained in preparation for go-live. Due to space constraints, classes will not be able to accommodate more than two auditors per session. It is neither necessary for the same 1-2 auditors to attend each session, nor is it required to audit classes. This is an accommodation for agencies that choose to use this approach.

On Call Staff

On Call (temporary) staff that will be onsite for more than 30 days have the same requirements as permanent staff. They will be required to complete classroom Avatar Training before being permitted access to the Avatar system. On Call staff working less than 30 days, are not expected to complete Avatar training and will not have access to the system. Permanent staff will receive training on this to ensure that the process for entering these services and ensuring appropriate documentation resides in the Electronic Health Record.

Performance Assessment and Training Evaluations

The evaluation strategy will include:

- Performance checks to demonstrate proficiency and identify gaps in training at the end of each module using Survey Monkey. These evaluation tools help the user identify what they have learned and what areas need to be reviewed. We will communicate that the purpose of performance checks is to ensure success in the new system.
- Collection of End-User feedback as a part of each course to evaluate content, learning effectiveness, and instructor ability. A Survey Monkey link will be loaded onto the training computers in the Classroom and the survey will be loaded onto WebEx for the Live Online Training. See Survey in Appendix A.
- Weekly review of feedback to incorporate needed improvements in the curriculum.

Attendance Tracking

Each class will have a sign in sheet to maintain attendance records

Post Go-Live Performance Assessment

- Assess performance ability after Go-live based upon management/supervisory observation and job results through Survey Monkey. See Appendix B –Management Feedback on Training & On Site Support.
- Track help desk calls to identify issues that can be corrected with training. For example, receiving the same questions may identify a gap in training.

Pre-Training and Training Strategies

The section “Typing Resources” on the Project website provides links to self-paced online typing tutorials. This will help build basic typing proficiency and confidence to support the transition from paper to electronic documentation.

In addition, “Introduction to Computers” classroom training will be offered twice a month. Program Liaisons will enroll staff in this training as needed.

Class Attendance We will keep track of class attendance to insure that all those requiring training receive it. Sites will need to ensure all of their staff gets trained. Attendees will sign in (sign-in sheet will be scanned) and the trainer will enter attendance on an excel spread sheet for easy traceability.

Practicing What is Learned (Sandbox) A practice environment will be available so End-Users can develop their skills on a practice system outside of the classroom. They will be provided with the URL at the end of each training session.

Trainer Self-Checks Time is built into the training schedule to allow trainers to meet and discuss the evaluation feedback received and to identify areas of strength as well as those needing improvement. Ways to improve specific areas will be brainstormed and implemented as soon as possible.

Keep Training Focused It may be necessary to refocus trainees during training if questions and discussions start to get off track. A 'parking lot' will be used to help keep the training on track. We will use a "parking lot" to identify issues for future discussion in other venues.

Lessons Learned from the SacHIE Pilot

The following table was adapted from the pilot summary. The lessons learned from the pilot that relate to training are listed below.

ISSUE	RESOLUTION
Initial modularized training left holes in understanding the inter-relatedness of modules. Although the modularized approach was done as an attempt to provide the most flexibility in scheduling, it did not yield the desired level of understanding by attendees.	Training guides will be used by all trainers for consistency, thereby ensuring standardized training for all end users.
New users had to wait too long to receive training.	A Training Calendar will be published on the Project website to allow all parties to proactively schedule new staff for training. In addition, classes will be scheduled more frequently.
The treatment plan form is the most difficult form for users to learn and master.	End-Users will be able to train multiple times on this difficult module, using both scheduled classroom training and recorded webinars that are available on demand.

Go Live Readiness

Go Live Checklist (see Appendix C) – A Go Live Checklist will be given in advance to each site. It will also be posted on the project website.

Walk Through – On the day prior to the Go Live event, an Avatar Implementation Team member will be on-site to do one final check to ensure the Go Live Checklist is completed and all PC's are ready. In addition, sites will have a Go Live prep meeting where the team member can address any final questions and concerns.

Training & Go Live Event Calendar

See Appendix D

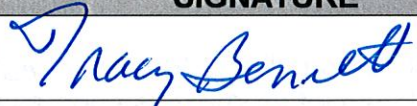



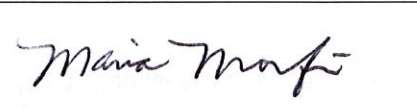
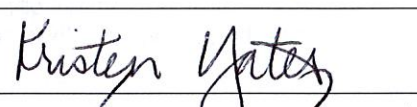
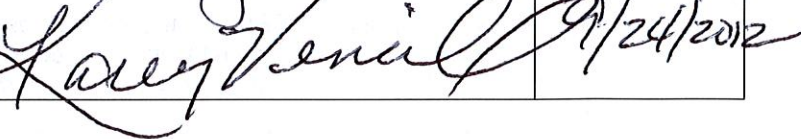
Support

Go Live – an Implementation team member will provide on site support following the Go Live event. The length of on site support will vary depending on the needs of staff and management.

Avatar Help Desk – 916/876-5806 The help desk is monitored daily from 8:00am to 5:00 pm. Staffing will be added as needed.

Avatar@Saccounty.net questions can be emailed here with a 24 hour response time

Signature Table

NAME	TITLE	SIGNATURE	DATE
Tracy Bennett	DHHS Acting Director		9/20/12
Mary Ann Carrasco	DBHS Deputy Director		9/20/12
Uma Zykofsky	DBHS Division Chief, Adult Mental Health		9/20/12
Lisa Bertaccini	DBHS Division Chief, Child and Family Mental Health		9/20/12
Maria Morfin	DBHS Division Chief, Alcohol and Drug Services		9/20/12
Kristen Yates	DHHS Senior Administrative Analyst		9/20/12
Kacey Vencill	Project Manager Avatar Implementation Team		9/24/2012

Appendix A

End-user Training Evaluation Form

<http://www.surveymonkey.com/s/EndUserTrainingEvaluation>

Appendix B

Management Feedback on Training & On Site Support

<http://www.surveymonkey.com/s/Training-OnSiteSupport>

Appendix C

Go-Live Checklist

The following tasks must be completed prior to an organization's go-live event. If you have questions about any of the tasks please let us know as soon as possible so that we can help.

<input type="checkbox"/>	Required training completed
<input type="checkbox"/>	Avatar launched successfully on all workstations (to confirm successful Java install)
<input type="checkbox"/>	Report viewer installation is complete on all machines - instructions and the install can be found on our site http://www.sacdhrs.com/default_old.asp?WOID=MBR
<input type="checkbox"/>	Ensure ODBC connections are properly configured – Information on how to do this is available in the " Technical Instructions " document on our site http://www.sacdhrs.com/default_old.asp?WOID=MBR
<input type="checkbox"/>	Ensure signature pad drivers are appropriately installed - Information on how to do this is available at the " Signature Pad Install " link on our site http://www.sacdhrs.com/default_old.asp?WOID=MBR
<input type="checkbox"/>	Ensure that signature pads have been assigned and received
<input type="checkbox"/>	Test the ODBC connections (reports) and signature pads
<input type="checkbox"/>	Scanners purchased and successfully installed

Appendix D

Training & Go Live Event Calendar

http://www.dhhs.saccounty.net/BHS/Avatar/Pages/GI_MyAvatar.aspx