



TRAINING NEEDS ANALYSIS FINAL REPORT
FOR
PUBLIC HEALTH – DAYTON & MONTGOMERY COUNTY (PHDMC)
February 10, 2017



1 INTRODUCTION

1.1 DOCUMENT PURPOSE

This *Public Health - Dayton & Montgomery County (PHDMC) Training Needs Analysis Final Report* summarizes the purpose of the assessment and the agreed-upon solutions based on the results, how the identified solutions will be designed, developed, implemented, and evaluated by select PHDMC staff and the TLC Media Design team, and how success will be measured, including how objectives will be assessed and measured. This document will also serve as our learning requirements baseline.

1.2 TRAINING NEEDS ANALYSIS OVERVIEW

TLC Media Design is on contract to initially conduct a training needs analysis, and based on this analysis, create the needed end-products to provide PHDMC and their staff a working solution to ensure both current and future staff members in each of the applicable departments can understand and be capable of using the tools, techniques, and knowledge resources available for fulfilling his or her responsibilities while utilizing the new electronic medical records system, Electronic Clinical Works (eCW). The following departments within the organization will utilize eCW:

- All Staff
- Office Support Staff
- Medical Staff
- System Admin/Help Desk Staff

Currently, PHDMC only has one employee who is the current System Administrator and has also been tasked with conducting 4 hr. instructor-led training to each of the above-mentioned departments. This employee is retiring in two months thus creating an urgent need to ensure her knowledge and expertise are captured, documented, and an appropriate model is put in place to ensure all staff can complete their specific portions of eCW tasks.

The following approach was used to conduct the needs analysis and capture relevant data:

- Two members of the TLC Media Design staff worked directly with the current System Admin for six weeks to learn how to use the system and document the steps involved. Training sessions were recorded so TLC Media Design had access to her instruction and demonstration of how to complete applicable steps within the system.
- In addition, TLC Media Design interviewed at least 2 members from each department to determine what the current processes are and their ability to replicate these in the eCW Test system. There was also an assessment questionnaire provided to help us determine how well they were able to remember the steps in the process using the new system.
- TLC Media Design also observed various tasks involving use of the eCW system in their work environment with patients that did not involve infringing on patients' right to privacy.

2 ANALYSIS DATA

2.1 ALL STAFF TASKS

All staff will demonstrate efficiency by successfully completing the following:

- | | |
|---|---|
| Open the eCW application and log in | Use various common navigation features common |
| Access My Settings to customize their workspace | Search for a patient |
| Verify client information | Create a new client |
| Schedule, reschedule or cancel appointments | Check a client in for an appointment |
| Create a telephone encounter | Set global alerts |
| Process Incoming and Outgoing Referrals | Use the Messaging feature |

Employee No.	Department	Role	Knowledge of Current Processes & Ability to Demonstrate	Knowledge of eCW Process & Ability to Demonstrate	What training, tools, resources have been made available to them	Hours of training received to date
A45798	Office Support Staff	Front Desk/Clerical	8	4	2-hour class & cheat sheet she created	2 hours
A11465	Office Support Staff	Admin Assistant	10	3	2-hour class & relies on co-workers or help desk calls for almost daily support	2 hours *Expressed they need a quick, easy way to access info
D222387	Medical Staff	CNA	6.5	2	Newer emp., has not attended class yet. Being trained by other co-workers	N/A
D01499	Medical Staff	Nurse	9	5	2-hour class and has used an elec med records system previously	2 hours
D00254	Medical Staff	Doctor	7.5	2	Relies on nursing staff to do most of this but is able to login	Has not been able to attend yet – not comfortable with technology

Risk Level Matrix:

Low Risk = Blue (7-10)

Medium Risk = Dark Orange (4-6)

High Risk = Red (1-3)

Observations

Most demonstrated ease and understanding of the current process. They were easily able to conduct their required tasks to move the patient from check-in to the waiting room, to an appointment with medical staff. After observing the employees trying to do the same using the eCW Test System it was obvious they struggled to remember all the steps they need to complete, and how to alert other departments. The medical staff found it frustrating to remember how to order additional tests, prescriptions, etc. for their patients. There is medium to high risk indicating the need for additional methods of ensuring staff can use the system in a quick and efficient manner to provide their patients with timely attention and care.

2.2 OFFICE SUPPORT STAFF TASKS

Office Support Staff will demonstrate efficiency by successfully completing the following:

- | | |
|--|--------------------------------------|
| Change the Visit Status Code | Verify client information |
| Enter additional client information, if needed | Check the S Jelly Bean icon |
| View Office Visits Page | Perform the client check-out process |
| Enter payments for LL Clinic only | Enter payment type |
| Enter billing information | |

Employee No.	Department	Role	Knowledge of Current Processes & Ability to Demonstrate	Knowledge of eCW Process & Ability to Demonstrate	What training, tools, resources have been made available to them	Hours of training received to date
A45798	Office Support Staff	Front Desk/Clerical	8	6	Access to test system to practice – *this person has limited tasks in this area and seemed more comfortable	2 add'l hours for office support tasks
A11465	Office Support Staff	Admin Assistant	10	3	Access to test system to practice but unable to remember the order of steps	2 add'l hours for office support tasks
A11944	Office Support Staff	Billing Specialist	8	6	Access to test system to practice	2 add'l hours for office support tasks – level of comfort increased when performing billing-related tasks

Risk Level Matrix:

Low Risk = Blue (7-10)

Medium Risk = Dark Orange (4-6)

High Risk = Red (1-3)

Observations

These staff members were easily able to demonstrate their ability to follow the current process for these tasks. The Billing Specialist was able to complete all billing-related tasks well in the eCW system; however, the observed employee struggled with navigating to the area in the system to process the client information. Frustration was expressed by all in trying to remember all the steps required to do what they referred to as “easy things to do.” There is medium to high risk indicating the need for additional methods of ensuring staff can use the system in a quick and efficient manner to provide their patients with timely attention and care and ensure payments are entered and processed correctly.

2.3 MEDICAL STAFF TASKS

Medical Staff will demonstrate efficiency by successfully completing the following:

- | | |
|--|--|
| Complete the Office Visit screen | Order labs using: Outside of template & Quick transmit |
| Complete the Progress Notes for a patient | Add Vitals |
| Add Immunizations/Injections | Add patient history |
| Add/Update patient care information and instructions | |

Employee No.	Department	Role	Knowledge of Current Processes & Ability to Demonstrate	Knowledge of eCW Process & Ability to Demonstrate	What training, tools, resources have been made available to them	Hours of training received to date
D222387	Medical Staff	CNA	6.5	2	Newer emp., has not attended class yet. Being trained by other co-workers	N/A
D01499	Medical Staff	Nurse	9	7.5	2-hour class and has used an elec med records system previously	2 add'l hour for medical support staff tasks – Most comfortable member of team
D11247	Medical Staff	Nurse	8	5	2-hour class & relies heavily on other staff if she needs help	2 add'l hour for medical support staff tasks
D00254	Medical Staff	Doctor	N/A	N/A	Unavailable for this part of assessment	2 add'l hour for medical support staff tasks

Risk Level Matrix:

Low Risk = Blue (7-10)

Medium Risk = Dark Orange (4-6)

High Risk = Red (1-3)

Observations

It is clear this department not only uses the eCW system in different ways than other departments but also demonstrates the highest amount of risk if they are not able to effectively utilize the system. They are responsible for patient clinical information, ordering lab work, and documenting the physician's instructions for ongoing care, etc. The doctor was not available for observation to protect patients' privacy; however, both nurses confirmed when they are working with this doctor (and a few others) they typically handle inputting all the information. One nurse demonstrates the highest capability of all staff in using the system and has had previous exposure to electronic medical record systems. They all expressed the need for a better way to not only learn the system but have access to just-in-time resources to get the support they need due to high demand and serving multiple patients daily. While there is still a medium to high risk associated with this category, they do have the benefit of at least one low-risk staff member who can use the system and help others as needed.

3 SOLUTION RECOMMENDATIONS

After conducting a thorough analysis over several weeks working with, observing, and interviewing the current System Administrator and various members from the departments we are recommending a two-fold approach which is outlined below:

2.4 Approach for System Admin/Help Desk Team

PHDMC has identified the current system admin as the gatekeeper of all front and back-end information for the eCW system. Due to her upcoming retirement, we need an effective method for documenting her knowledge and expertise and ensuring the new system admin and the new help desk team members are thoroughly trained and able to not only implement system changes and requirements but also provide help resources to the PHDMC staff.

Based on the severity of risk we recommend we create a comprehensive digital user manual that covers both system administrative tasks as well as all other tasks each department is responsible for. This can be used as a valuable resource for learning the system as well as providing rapid support to the entire staff when help tickets are entered in the system or calls are received.

In addition, based on our work with the current system admin, we recommend utilizing the video recordings of her live instruction as well as other documented items to help us develop a series of eLearning lessons tailored specifically for the System Admin/Help Desk Team. All eLearning lessons will provide educational information utilizing real-world scenarios, an opportunity to practice what they've learned, and assessed using various type of interactive quizzes. These lessons shall be SCORM and Sec 508 compliant to meet the needs of the workforce. In addition, TLC Media Design will work with PHDMC to implement Moodle as their Learning Management System (LMS) and set up the learning paths, grade centers, etc. as part of their contract.

2.5 Approach for All PHDMC Staff

Based on our observations comparing knowledge and skill levels using both the current process and the eCW system and interviews with a sampling of staff members responsible for using the system daily, there is a medium to high risk of long wait times for patients, mistakes made in the system, and staff members experiencing several pain points related to using the system.

We recommend providing task-specific digital resources that provide How To tutorials and PDF lists they can utilize. To best prepare current and future employees for system use we also recommend a series of eLearning lessons tailored specifically for each department and another series that covers the general "All Staff" tasks. These shall also utilize real-world scenarios, an opportunity to practice what they've learned, and various types of interactive assessment activities. In addition, the Try It segments of the lessons can be accessed again at any time for additional practice or to use as a resource.

For both approaches, these lessons shall be SCORM and Sec 508 compliant to meet the needs of the workforce. In addition, TLC Media Design will work with PHDMC to implement Moodle as their Learning Management System (LMS) and set up the learning paths, grade centers, etc. as part of their contract.

PLEASE NOTE: THE REMAINING PORTIONS OF THIS DOCUMENT CONTAIN ACTUAL PATIENT DATA AND CANNOT BE SHARED DUE TO PRIVACY LAWS.