**Alert Watch and Response Engine (AWARE)**

Training Plan



May 2014

Prepared by Harris Corporation

CLIN 0009AA

Revision History

| Creation Date | Version No. | Description/Comments | Author(s) | Reviewer(s) | Review Type | Issue Date |
| --- | --- | --- | --- | --- | --- | --- |
| 05/14/2014 | 0.01 | Initial | M. Becker D. Horst |  |  | 05/15/2014 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Table of Contents

1 Plan Summary 1

1.1 Purpose 1

1.2 Background 1

1.3 Stakeholders and Key Personnel 1

2 Approach 2

3 Training Program Implementation 2

3.1 Administrator Training Manual 3

3.2 Lessons 3

3.2.1 Alert Tracker 3

3.2.2 Alert Cache Viewer 3

3.2.3 KB Editor 4

3.2.4 QI Tool 4

3.2.5 Supporting Materials 5

3.3 Dependencies 5

4 Training Deliverables 6

5 Resources 6

5.1 Instructors/Facilitators 6

5.2 Media 6

5.3 Equipment 6

5.4 Sites 6

5.5 Facility 6

5.6 Distribution or Shipping 6

6 Schedule 7

7 Attachment A - Approval Signatures 8

List of Tables

[Table 1 – Stakeholders and Key Personnel 2](#_Toc387928643)

[Table 2 - Training Deliverables 6](#_Toc387928644)

[Table 3 - Training Schedule with Milestones 7](#_Toc387928645)

# Plan Summary

## Purpose

This Training Plan describes how user training for the Alert Watch and Response Engine (AWARE) will be conducted. It includes a summary of AWARE, the training approach, a breakdown of training materials, and a listing of the required deliverables.

## Background

AWARE is a set of modular updates to the Computerized Patient Record System (CPRS) and to the critical alert tracking workflow. It will initially be implemented at the Charleston and Long Beach Veterans Affairs Medical Centers (VAMCs).

The AWARE project’s main focus is to assist in the tracking of critical alerts and to verify timely follow-up, with the overall goal of improving patient outcomes. Initially, AWARE will focus on four types of critical alerts, all of which can be considered pre-cancer indicators: Prostate-Specific Antigen (PSA), Fecal Occult Blood Tests (FOBTs), Abnormal Mammograms, and Abnormal Imaging.

AWARE consists of four main components, which are summarized below.

* Alert Prompt and Follow-Up Action Tracker: Updates to CPRS that prompt clinicians to respond to critical alerts that have not been followed-up or for which the follow-up is late, and provides a means for clinicians to log follow-up actions that have been performed.
  + Primary End User Groups: Clinicians, Nurses, Nurse Practitioners
* Alert Cache: A web-based tool for clinicians and supervisors to review information about their current alerts and which alerts are late.
  + Primary End User Group: Clinicians, Care Team Leads
* Knowledge Base (KB) Editor: A tool for creating alert categories and types, and for setting business rules. This will be used for customizing alerts for a given VA installation.
  + Primary End User Group: Clinical Application Coordinators (CACs)
* Quality Improvement (QI) Tool: A web-based tool to sort, categorize, and review the numbers of critical alerts, the rate of follow-up, and other related data (e.g., by provider, clinic, or facility).
  + Primary End User Groups: Patient Safety Managers, Patient Safety Officers, Department Chiefs, Care Coordinators, and Clinicians

The training approach is structured by the above four components but targeted to specific end user groups. Thus while there may be some overlap among user groups, there is the presumption that, beyond an introductory overview of AWARE, there is no need for all end users to learn all components. Each AWARE component will be presented through a separate set of training materials.

## Stakeholders and Key Personnel

The stakeholders and key personnel overseeing this training plan are listed in the following table.

Table 1 – Stakeholders and Key Personnel

| **Stakeholder/Key Personnel** | **Organization** |
| --- | --- |
| Blake Henderson / VA Project Manager | VA |
| Blake Jan / Harris Team Project Manager | Harris Corporation |
| Dick Horst / User Experience Specialist | UserWorks, Inc. (Harris Team) |
| Mark Becker / User Experience Specialist | UserWorks, Inc. (Harris Team) |
| Dana Douglas / User Experience Specialist | UserWorks, Inc. (Harris Team) |

# Approach

AWARE training will use an individualized, self-serve, self-paced, web-based approach. This will be supplemented by training administrators at each VA installation who will be available to assist end users as needed on either a one-on-one or small group basis. These administrators will be familiarized with AWARE via a “train-the-trainer” approach. The same training materials that are made available to end users will be employed to train these administrators (i.e., trainers). The training administrators will be drawn from either appropriate training staff in a given VA site’s Education Department or “superusers” who will be identified and designated for that responsibility by VA.

The general training process will be as follows:

1. Training administrators (Trainers) are identified at a given VA site. Different trainers may be selected depending on the material to be conveyed. For example, a CAC knowledgeable with the KB Editor may serve as a resource in training other CACs on its use. A “superuser” clinician may serve as a resource to other clinicians, nurses, and nurse practitioners on the Alert Prompt and Alert Cache.
2. Trainers review the Administrator Training Manual and online Training Materials to verify that they have a complete understanding of AWARE.
3. Training Materials are made available to administrators and end users, hosted on the VA AWARE SharePoint or other intranet.
4. End users access the Training Materials on a self-serve basis or, if preferred, the training administrators organize small group sessions in which to present the Training Materials. These small group sessions could be conducted as in-person classroom sessions or webinars. Such sessions would likely be spread across multiple sessions over multiple days and shifts, corresponding to the lessons by which the Training Materials are organized.
5. Training administrators remain available as resources to answer any questions end users may have and respond to problems as they arise.

# Training Program Implementation

The following materials will be developed to support the training process:

* Administrator Training Manual
* Training Materials
  + Lessons
  + Supporting Materials

These are described in further detail below. They will be developed to be compatible with, and drawing from, the User Interface Document and other user guides being developed by the Harris Team for the AWARE project.

## Administrator Training Manual

An Administrator Training Manual will be provided for instructing trainers on how to use the training materials and offering suggestions on potential activities for presenting AWARE on a one-on-one or small group basis. It will include the following sections:

1. Overview of AWARE
2. Explanation of the training process
3. Instructions on how to access the Training Materials
4. Instructions on whom to contact and other resources in case questions about AWARE arise that the trainer cannot answer
5. Suggested activities for presenting AWARE to individuals or small groups who prefer those approaches to a strict self-serve approach

## Lessons

The following section describes the topics that will be covered in the training. Each lesson will be taught using a combination of supporting materials, such as user manuals, PowerPoint presentations, and videos. The lessons will be downloadable from the VA AWARE SharePoint. Specific examples drawn from a typical VA clinical practice will be used to illustrate the use of AWARE.

### Alert Tracker

1. Overview of the Alert Tracker
2. (System Administrator) System/Configuration Requirements
3. AWARE Critical Alert Workflow
   1. Reminder Dialog
      1. Addressing Alerts
      2. Deferring Alerts
   2. Selecting an AWARE Template
   3. Follow-Up Action Dialog
      1. Selecting Follow-Up Actions
      2. Making Orders
      3. Entering Comments
      4. Finishing and Signing Progress Notes
4. Troubleshooting

### Alert Cache Viewer

1. Overview of the Alert Cache Viewer
2. (System Administrator) System/Configuration Requirements
3. (System Administrator) Assigning a Security Key
4. Logging In to the Alert Cache Viewer
5. Navigating through the Alert Cache
6. Viewing Alerts
   1. Filtering Data
7. Viewing Alert Details
   1. Alert Tab
   2. Follow-up Action Tracker (FAT)/Status Tab
   3. Result Tab
   4. Follow-up Actions Tab
8. Logging Out of the Alert Cache Viewer
9. Troubleshooting

### KB Editor

1. Overview of the Alert Cache Viewer
2. (System Administrator) System/Configuration Requirements
3. Logging In to the KB Editor
4. Navigating through the KB Editor
5. Alert Categories
   1. Viewing Alert Categories
   2. (System Administrator) Add/Edit Alert Category
6. Alert Types
   1. Viewing Alert Types
   2. Add/Edit/Delete Alert Types
      1. Configuring the Reminder Dialog
      2. Configuring the Order Dialog
      3. Configuring the Follow-up Dialog
      4. Configuring the Comments Dialog
7. Verifying Alerts are Configured Correctly
8. Logging Out of the KB Editor
9. Troubleshooting

### QI Tool

Overview of the QI Tool

1. (System Administrator) System/Configuration Requirements
2. Logging In to the QI Tool
3. Viewing Reports
   1. Setting Report Parameters
   2. Understanding Reports
4. Using the Super User Administrative Menu
   1. Add/Edit/Delete QI Tool Groups
   2. Add/Edit/Delete VistA Groups
   3. Add/Edit/Delete Users
   4. Edit Reports
5. Logging Out of the QI Tool
6. Troubleshooting

### Supporting Materials

The following support materials will be developed and hosted on the VA AWARE SharePoint:

* User Manuals – The user manuals being developed by the Harris team for each of the AWARE modules will be adapted for training purposes. The user manuals will cover each module’s functionality in-depth, alongside screenshot examples.
* PowerPoint Presentations – A PowerPoint presentation will be made for each of the AWARE modules, broken into sections covering each of the lessons noted above. Each section (lesson) will include example walkthroughs of the correct workflow and end with discussion questions for trainers to assess trainees’ understanding of the material.
* Videos – A video will be made for each of the AWARE modules, covering the lessons noted above. The videos will be accompanied by narrated instructions and consist of animated walkthroughs of common tasks in AWARE, still images of screens to explain functionality.
* An acronym list.

## Dependencies

In order to effectively implement this training approach, the following dependencies must be satisfied:

* VA site personnel (either in the Education Department or whomever handles personnel training) will work with the Harris Team to make test materials are available on the VA AWARE SharePoint.
* Trainers/superusers will be identified by VA at each installation.
* Selected training administrators will review training materials to familiarize themselves with the AWARE modules.
* Members of the executive staff at each VA will verify that the availability of this training program will be communicated to all pertinent personnel.

# Training Deliverables

Table - Training Deliverables

| **Project Deliverables** | **Responsible Party** |
| --- | --- |
| Training Plan (this document) | Harris/UserWorks, Inc. |
| Administrator Training Manual | Harris/UserWorks, Inc. |
| Training Materials | Harris/UserWorks, Inc. |

# Resources

## Instructors/Facilitators

As AWARE is rolled out to a given VA installation, the Harris team will work with the VA program team to identify appropriate training administrators for that site.

## Media

The AWARE training materials will be in the form of Microsoft Word documents, PowerPoint presentations, downloadable PDFs, and Windows Media Player (wmv) video files.

## Equipment

The Harris team does not anticipate any special equipment being required for the training. A Windows PC with an internet connection and Microsoft Office, with appropriate access to AWARE, should be sufficient.

## Sites

Two sites have been targeted for initial installation of AWARE and thus will also serve as a testbed for the present training:

* Site 1: Ralph H. Johnson VA Medical Center, Charleston, SC
* Site 2: VA Long Beach Healthcare System, Long Beach, CA

The schedule for conducting training at these sites is below in Section 6.

## Facility

No special facility is anticipated or required for the proposed training effort.

## Distribution or Shipping

All training materials to be available via direct download from each site’s VA AWARE SharePoint. No physical materials will be shipped to the participating sites other than those required to otherwise host AWARE.

# Schedule

The schedule below lists the current anticipated milestones for the AWARE training effort.

**NOTE**: Dates below are as of latest document version.

Table - Training Schedule with Milestones

| **Milestone** | **Date(s)** |
| --- | --- |
| Initial version of AWARE Training Plan (this document) | 5/16/14 |
| Initial version of AWARE Administrator Training Manual | 6/16/14 |
| Initial version of AWARE Training Materials | 6/16/14 |
| Site 1 Training Period (Charleston, SC) | 4/21/14 to 7/9/14 |
| Site 2 Training Period (Long Beach, CA) | 7/15/14 to 9/2/14 |

# Attachment A - Approval Signatures

The following members of the governing IPT are required to sign. Please annotate signature blocks accordingly.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Signed: Date:  
Blake Henderson   
Project Manager  
Innovation Coordinator

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Signed: Date:  
Brian Stevenson   
Contracting Officer’s Representative  
Innovation Coordinator  
VHA OIA Innovation