Euroking Cascade Training Project Overview

Training Department

July 2019

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Introduction

Purpose

The purpose of this document is to provide a complete overview of the Euroking Cascade Training approach including comprehensive details on how to assess training requirements, identify suitable Cascade trainers who will be trained via Train the Trainer sessions and assess and schedule all appropriate End-User training. This document also includes a timetable of Euroking Cascade Training for use by Cascade Trainers.

Audience

This document should be reviewed in detail by Project Managers/Training Coordinators ahead of the initial training consultancy and then by all Cascade Trainers (once elected) ahead of the Train the Train sessions as this document provides information which is essential to the success of Cascade Training session and End User training itself.

Completion Instructions

Project Managers/Training Coordinators and Cascade Training Delegates must review this document in full ahead of any Euroking training both in order to fully appreciate the requirements of the Euroking Cascade Training approach and to complete the actions required by the customer in order to enable Euroking training to be delivered as effectively as possible.

Euroking Cascade Training Timeline

ACTION ONE – TRAINING CONSULTANCY & TRAINING NEEDS ANALYSIS		
WEEK 1	WEEK 2	WEEK 3
▪ TRAINING CONTACT E-MAIL ▪ PROPOSED TRAINING DATES	▪ BOOK TRAINING ROOMS ▪ CONFIRM TRAINING DATES ▪ CONSIDER TTT DELEGATES	▪ TCON OR FACE TO FACE MEETING ▪ INITIAL TRAINING NEEDS ANALYSIS
WELLBEING SOFTWARE	CUSTOMER	WELLBEING / CUSTOMER

ACTION TWO – TRUST PLANNING				ACTION THREE – CORE TRAINING
WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8
TRUST PLANNING	FOLLOW-UP PROGRESS CALL	RETURN COMPLETED CHECKLISTS	READINESS TO PROCEED CALL	EUROKING CASCADE / TTT TRAINING (2 DAYS)
CUSTOMER	WELLBEING / CUSTOMER	CUSTOMER	WELLBEING / CUSTOMER	WELLBEING / CUSTOMER

ACTION FOUR – TRAINING CONSOLIDATION	ACTION FIVE - END USER TRAINING	ACTION SIX – GO-LIVE	ACTION SEVEN – POST GO-LIVE TRAINING
WEEK 9 – 10	WEEK 11 - 13	WEEK 14	WEEK 17
▪ CASCADE TRAINER CONSOLIDATION ▪ END USER TRAINING FINAL PLANNING	▪ END USER TRAINING	▪ EUROKING GO-LIVE ▪ HAND-HOLDING	▪ SYSTEM MANAGEMENT ▪ STATISTICAL REPORTS (1 Day)
CUSTOMER	CUSTOMER	WELLBEING / CUSTOMER	WELLBEING / CUSTOMER

ACTION 1: TRAINING CONSULTANCY & TRAINING NEEDS ANALYSIS	
OBJECTIVES WEEK 1 – 3	**Training Overview and Training Needs Analysis** - Following the start of the project the Wellbeing Software Training Manager will contact the Training Lead to provide provisional training dates, and electronic copies of all Euroking Training documentation to assist the customer in assessing overall End User training requirements in addition to scheduling the first training meeting either by Conference Call / WebEx or Face to Face. Wellbeing PM's will typically have advised the customer of provisional training dates at the beginning of the project, and advised that they need to begin looking at availability of a formal Training room and staff resources. This will then be formalised when the Wellbeing Software Training Manager contacts the Customer, with a view to confirming the Training dates and room booking during the initial Training Consultancy and Training Needs Analysis Conference Call / Meeting. Wellbeing Software will then undertake a Conference Call / WebEx or Face to Face "Training Needs Analysis".
ACTIONS REQUIRED	Following the 'Initial Training Consultancy' the Customer should: **DESIGNATE DELEGATES FOR EUROKING TRAINING** – Following the training consultancy the Customer should elect a minimum of 4 and maximum of 8 'Delegates' who will attend Euroking Cascade Training. These Delegates should consist of a mixture of 'Cascade Trainers' who will go on to deliver pre and post go-live End-User training and Personnel who will be directly involved in the deployment tasks, and pre and post go-live Euroking system configuration / management. Each 'Delegate' should therefore be issued with a copy of this document as soon as possible prior to the Euroking Cascade Training 'Train the Trainer' sessions which will normally take place 8 weeks prior to go-live. Wellbeing Software would recommend 'Cascade Trainers' are drawn from a mixture of disciplines including departmental staff and existing IT trainers. If the Customer does elect IT trainers, they are required to have a comprehensive understanding of the maternity department which may involve a period of shadowing key members of staff in maternity processes prior to undertaking Wellbeing Software 'Train the Trainer' course. If the Customer elects departmental staff, they must be drawn from across all disciplines i.e. clerical, clinical and community. All delegates must have above average IT skills and a

comprehensive knowledge of all departmental working practice and in addition, good communication skills and an ability to relate to a wide range of people.

Wellbeing Software would also recommend that the Customer does not overlook the commitment this role requires, and it is therefore imperative that the Customer and 'Cascade Trainers' selected for this role are aware that training for the volumes of End-Users required can only realistically be delivered in a classroom environment for up to 8 delegates. 'Cascade Trainers' are therefore likely to require a temporary secondment from their current position in order to dedicate the appropriate time necessary to meet the timeframes of the system go-live.

Consequently, in light of this each 'Cascade Trainer' must have an understanding of the complete Euroking system to enable them to deliver training on all aspects of Euroking functionality to any type of End-User. This therefore means that following the initial 'Train the trainer' courses and 'Cascade Trainer planning period, 'Cascade Trainers' should be able to dedicate just one or two days per week to training, as the remaining week could conceivably be covered by other 'Cascade Trainers, or even scheduled to run concurrently based on a rolling rota of 'Cascade Trainers'.

EVALUATE 'END-USER' TRAINING REQUIREMENTS – Wellbeing Software would also recommend that the Customer begin assessing End-User Training requirements immediately after the initial consultancy meeting.

This is to ensure that the Customer allows sufficient time for the Department to review the training courses currently available, which should be delivered by the 'Cascade Trainers' themselves in order to facilitate the most effective End-User training.

Consequently, by undertaking this course of action the department are able to correctly identify the number of staff requiring each type of training course - thereby enabling the them to easily assess the volume of End-User training required and encourage the department to begin scheduling staff into a suitable End-User timetable. This allows the 'Cascade Trainers' themselves to continue to concentrate on planning/practising the training itself.

Please note: You should also be aware that in most cases, it will not be possible to train each and every user during the End-User training period – and it will therefore be necessary to undertake post go-live cascade training to individual Users such as those who work shifts, are on holiday or are more occasional users. You should aim to concentrate on scheduling formal training for staff who need to use the system constantly on a day-to-day basis, whereas more occasional users can normally be trained on an Adhoc basis either during the initial go-live hand-holding period, or by System Managers after this period.

ACTION 2: TRUST PLANNING	
OBJECTIVES WEEKS 4 - 7	**ELECTING CASCADE TRAINERS -** Following the 'Initial Training Consultancy' Wellbeing Software envisage that the Customer will require a suitable period of time to elect 'Cascade Trainers', who will then themselves also need time to review this document and in particular the 'Train the Trainer' documentation in order to ensure that they are fully versed with the requirements of this role prior to the practical 'Train the Trainer' sessions themselves. This period should also be used to ensure that 'IT Trainers' are able to spend time in the Maternity Department to familiarise themselves with departmental workflow models and overall working practice. Wellbeing Software also recommend that the Customer ensure this period is used to encourage the Maternity Department itself to assess 'End-User' training requirements to ensure that 'Cascade Trainers' have an accurate guide to the volume of End-User training required and are therefore able to allow sufficient time to deliver training within the timeframes of the Euroking system Go-Live. Wellbeing Software do not however recommend that 'Cascade Trainers' should themselves schedule the Euroking End-User training but instead use the information provided by the department to agree suitable dates, and a proposed timetable which should then be completed by the department who are obviously in a much better position to rota staff and or re-schedule accordingly. Wellbeing Software also envisage that the Customer will need to use this period to confirm suitable training location not only for the practical 'Train the Trainer' sessions but also to provisionally reserve facilities for the End-User training period itself based on feedback regarding required End-User training from the department. IT will be required to ensure that the Euroking client has been installed on the Training room PC's ahead of the practical Euroking 'Train the Trainer' Courses and Euroking 'End-User' training itself. **Follow - up / Progress Conference Calls -** The Wellbeing Software Training Manager will be in contact with the Customer during the Planning period to check on progress in Week 5, and undertake a formal 'Training Readiness' conference call in the week prior to Cascade Training. This is to ensure the Customer has the opportunity to raise queries as applicable and to confirm that the Customer have undertaken all required actions in order to proceed with Euroking Cascade Training as required. **Returning Training Checklists –** Wellbeing Software will supply a Euroking Cascade Training Checklist which the Customer will be required to complete and return ahead of the final

	conference call and will determine if training is judged to be ready to proceed.
ACTION REQUIRED	<u>To complete 'ACTION 2' the Customer should have:</u> COMPLETED AND RETURNED EK_TRG_202_Euroking_Cascade_Training_Checklist_V1.1.docx by the agreed deadline ahead of the final 'Readiness to Proceed' conference call. CONFIRMED 'CASCADE TRAINERS' and forwarded the 'names' and 'roles' of each 'Cascade Trainer' to the Wellbeing Software Training Manager ahead of the practical 'Train the Trainer' sessions (i.e. John Smith – Clerical Assistant, Mary Jones – IT. Trainer, Joe Bloggs – Radiographer etc.). This should be completed using the EK_TRG_202_Euroking_Cascade_Training_Checklist_V1.1.docx supplied by Wellbeing Software following the 1st meeting. DELIVERED/EVALUATED Euroking 'TRAIN THE TRAINER' DOCUMENTATION to ensure that all 'Cascade Trainers' have reviewed training objectives and course overviews ahead of the practical 'Train the Trainer' sessions. RECEIVED FEEDBACK REGARDING 'END USER' TRAINING REQUIREMENTS from the department in order to enable 'Cascade Trainers' to assess the number of days End-User training required. This is to ensure that it is possible to reserve training facilities and to assist 'Cascade Trainers' during their practical Euroking 'Train the Trainer' sessions in learning how to prepare a sample timetable which will then be used by the Maternity department to allocate staff for training. BOOKED/RESERVED TRAINING FACILITIES ahead of the practical Euroking 'Train the Trainer' session and Euroking 'End-User' Training. TASKED 'IT' DEPARTMENT TO INSTALL THE Euroking CLIENT ahead of the Euroking Cascade Training 'Train the Trainer' session, and Euroking 'End-User' Training. Instructions on installing the Euroking client will be provided via the Wellbeing Software Project Manager, or via the Wellbeing Software Service Desk.

ACTION 3: EUROKING CASCADE 'TRAIN THE TRAINER' SESSIONS

OBJECTIVES WEEK 8	**WEEK EIGHT – DAYS 1 & 2: COMPLETE CORE SYSTEM OVERVIEW (2 FULL DAYS)** Intensive Euroking Application Training for up to 8 delegates covering all aspects of CORE User-level System Functions, System Administration and Statistical Reporting. 'Cascade Trainers' will then be left to review Euroking 'Train the Trainer' documentation, course guides and course objectives.

ACTIONS REQUIRED	All DELEGATES must complete the entire CORE Euroking Front End System Training to receive a Euroking Training Certificate. It is not expected that all delegates will need to attend the System Admin and Statistical Reports only key personnel who will be directly involved in deploying the Euroking system and its day-today running post go-live.

ACTION 4: 'CASCADE TRAINER' PLANNING / CONSOLIDATION

| OBJECTIVES WEEKS 9 – 10 | Following the practical Euroking 'Train the Trainer' sessions Wellbeing Software envisage each 'Cascade Trainer' will need time to familiarise themselves with each aspect of the Euroking System in context with the objectives of each training course and the Customer's own existing vs future state working practices.

At the minimum this is likely to require at least one (ideally two) weeks of hand-on use of the Euroking system to understand the requirements of each session – i.e. practising each course step by step as an 'End-User' followed by a second week of practising delivering the training itself – perhaps as a role-playing exercise delivering training to other 'Cascade Trainers' in order to practice timings in general, and the event of unexpected questions or disruptive delegates.

Wellbeing Software also recommend that the Customer ensure this period is used to encourage the Maternity Department itself to evaluate the Euroking system and their existing working practice to agree where changes may need to be made in line with the new system and to enable the Trainers to be made aware of how the system should be used in context to Departmental / Customer requirements.

Cascade Training should concentrate on the Course Guides / Teaching scripts in order to prepare in conjunction with the Euroking CRIB Sheets which are available via http://www.euroking.com/training/. For details of accessing this documentation please e-mail emma.savage-mady@hssnet.com

Throughout this period the 'Cascade Trainers' will also need to follow-up with the department to ensure that they are scheduling the End Users' timetable correctly and have made the best use of the time available. Wellbeing Software therefore recommend that during the 'Cascade Trainer' planning, and prior to End-User training the Customer should ensure that each 'Cascade Trainer' knows on what dates they will be delivering each sessions/ modules throughout the End-User training period. Training room(s) must be correctly configured for training and sufficient numbers of Euroking CRIB sheets have been photocopied for distribution during 'End-User' Training Sessions. |
|---|---|

ACTIONS REQUIRED	To complete 'Action 4' each 'Cascade Trainer' should: HAVE UNDERTAKEN A PRACTICAL REVIEW OF EACH INDIVIDUAL TRAINING SESSION – to ensure familiarity with the content and objectives of each course and begin envisaging how they plan to deliver the training required within the timeframes recommended by Wellbeing Software. HAVE PRACTISED DELIVERING A CORE MIDWIFE SESSION OR PREFERABLY ALL SESSIONS – to other 'Cascade Trainer' and ideally then continue to demonstrate all other sessions. Wellbeing Software would therefore recommend scheduling a week of training that covers a broad range of sessions. It is important these sessions are delivered within the recommended duration of time (i.e. CORE Midwife – 3 hours). Ideally, these sessions should then be delivered to other cascade trainers (posing as End Users') by alternating 'Cascade Trainers'. HAVE FINALISED INDIVIDUAL DELIVERY OF EACH TRAINING SESSION – continuing to practice alone and in groups where possible. HAVE AGREED A FINAL 'END-USER' TRAINING TIMETABLE WITH THE DEPARTMENT. DISCUSSED WORKING PRACTICE WITH THE DEPARTMENT - to assist in training and system configuration prior to the beginning of End-User training. CONFIRMED THAT THE TRAINING ROOM/PC'S ARE CORRECTLY SET-UP – In order to ensure that the application is working and correctly configured and confirmed that sufficient Euroking CRIB sheets have been photocopied for distribution to delegates during 'End-User' training.

ACTION 5: END-USER TRAINING

OBJECTIVES WEEK 11 - 13	Deliver all 'End-User' training to agreed timetable.
ACTION REQUIRED	Throughout 'End-User' training the each 'Cascade Trainer' should: ENSURE EACH 'END-USER' SIGNS THE ATTENDANCE REGISTER – which will then enable the department to assess which members of staff have received training. REQUEST EACH DELEGATE COMPLETE A TRAINING EVALUATION FORM – Wellbeing Software recommend that each delegate completes a Training Feedback form to assess the success of training and encourage feedback where applicable.

ACTION 6: EUROKING GO-LIVE

OBJECTIVES WEEK 14	Provide go-live support to departmental and Wellbeing Software hand-holding team.
ACTION REQUIRED	PROVIDE HAND-HOLDING SYSTEM SUPPORT & ADHOC TRAINING – It will not be possible to train all members of staff during the formal 'End-User' training period (especially Obstetricians / Anaesthetists) and it is therefore likely to be necessary to deliver 'on-the-job' training during the go-live itself, or to arrange formal training sessions on a one-to-one or in small group basis as appropriate after this time.

ACTION 7: POST GO-LIVE TRAINING

OBJECTIVES WEEK 17	POST GO-LIVE SYSTEM MANAGEMENT TRAINING – ½ DAY
	Wellbeing Software will also undertake a 'Post Go-live System Management' session once it is felt that the 'key users' and Maternity System Manager(s) are adept in the CORE use of the system, and once the system has been installed for a sufficient period of time to ensure that this advanced session is as beneficial as possible to those attending.
	This is a more in-depth look at Euroking System Management to enable to Maternity System Manager(s) to take control of the long-term day-to-day running of the Euroking system.
	POST GO-LIVE STATISTICAL REPORTS TRAINING – ½ DAY
	During the afternoon of Post Go-Live Training Wellbeing Software will undertake a Statistical Reports session designed to teach delegates how to go on to use and write their own statistical reports.
	Anyone attending these sessions must have undertaken CORE Euroking Training, or at a minimum have attended a Euroking End to End System Overview in order to be eligible to join the course. This course uses specific practical exercises to demonstrate how to use the module and go on to write your own reports. The session also provides an overview of the Euroking Stats and Lists which are designed to satisfy national returns.
	This session is intended to prepare delegates to make comprehensive use of Statistical Reports functionality. The session does however require delegates to go on to undertake personal

	consolidation following the standard session to ensure they can in future create and run their own stats successfully. Failure to undertake this consolidation would negate any long-term success following the course. Please note: The session cannot be tailored to individual requirements since a training session is not the correct platform to undertake system consultancy or troubleshoot issue which should be raised via the Service Desk.
ACTION REQUIRED	The Customer will need to allocate a maximum of 6 delegates to attend the Post Go-Live System Management & Statistical Reports Training which would typically include Maternity System Managers, Key Department Managers and Digital Midwives and invites are often extended to IT personnel or data analysts responsible for producing statistical data and monthly returns.

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Euroking – Cascade Training Timetable/Overview

COMPLETE SYSTEM OVERVIEW - Comprehensive Euroking Application Training covering all aspects of User-level system functions, including Community Offline functionality and use. This part of the session should be attended by all delegates.

DAY ONE TIMETABLE

09:00 – 09:30	INTRODUCTION TO EUROKING, LOGIN AND SCREEN TOUR
09:30 – 10:00	OPENING AND NAVIGATING THE PREGNANCY RECORD
10:00 – 11:00	DATA FORMS AND DATA ENTRY WITH EXERCISES
11:00 – 11:30	BREAK
11:30 – 12:00	PHR – PATIENT HEALTH RECORD (AUTHORISING PATIENT ACCESS / MY PREGNANCY AND ME)
12:00 – 13:00	CARE PATHWAYS - ANTENATAL QUESTIONNAIRES WITH EXERCISES
13:00 – 13:30	LUNCH
13:30 – 15:00	CARE PATHWAYS - DELIVERY CARE PATHWAY WITH EXERCISES and BABY REGISTRATION
15:00 – 15:30	BREAK
15:30 – 16:00	EUROKING COMMUNITY OFFLINE - MANAGING PATIENT RECORDS IN THE COMMUNITY OFFLINE APPLICATION WITH EXERCISES
16:00 – 16:30	PHR – PATIENT HEALTH RECORD OVERVIEW (NOTES / BIRTH PREFERENCES)
16:30 – 17:00	PRACTICAL CONSOLIDATION AND Q & A SESSION

SYSTEM ADMINISTRATION and STATISTICAL REPORTING - Euroking System Administrator training in managing Users, User Roles and Topview. The session also includes an overview of creating statistical reports and lists via Euroking Stats and Lists and the Stats Builder application. This part of the session need only be attended by selected delegates – i.e. Digital Midwives / System Managers / Clinical and Clerical Managers

DAY TWO TIMETABLE

09:00 – 10:00	SYSTEM ADMINISTRATION – Managing Users, User Roles and Topview
10:00 – 10:30	USING STATS AND LISTS IN EUROKING
10:30 – 1100	BREAK
11:30 – 13:00	EUROKING STATS BUILDER with EXERCISES
13:00 – 13:30	LUNCH
13:30 – 14:30	ADMINISTRATION OF PHR
14:30 – 15:00	BREAK
15:00 – 16:00	PRACTICAL CONSOLIDATION AND Q & A SESSION

The following 'CORE' sessions are currently available for the Euroking System. These need to be taken into consideration when scheduling the training sessions and can be combined in any way which best suits the needs of the End-User.

CORE SESSION FOR MIDWIVES - 3 HOURS (includes a 15-minute break)	
SESSION PREREQUISITES	This session must be completed by all midwives and maternity support workers prior to attending any other advanced E3 Sessions such as System management or Stats builder training.
SESSION OBJECTIVES	Overview of the system, covering core system functionality including searching for patients, selecting, opening and navigating through a pregnancy record. Checking and filling out data forms and completing care pathway questionnaires appropriate to the midwife role from the first booking, delivery care with baby registration through to post-natal discharge. The session also covers the use of the E3 Community Offline product, downloading a patient record to the product from E3, using the record offline and uploading back to E3. An overview of the Patient Health Record (PHR) is also covered in this session. This session is designed to give each member of staff a grounding of the core system either ahead of the system go-live itself, or as a prerequisite to any advanced sessions which may be required.
CORE SESSION FOR OBSTETRICIANS – 1 HOUR	
SESSION PREREQUISITES	This session must be completed by all Obstetricians ahead of system go-live.
SESSION OBJECTIVES	Overview of the system, covering core system functionality including searching for patients, selecting, opening and navigating through a pregnancy record. Completing care pathway questionnaires appropriate to the Obstetrician role.
CORE SESSION FOR OBSTETRIC ANAESTHETISTS – 1 HOUR	
SESSION PREREQUISITES	This session must be completed by all Obstetric Anaesthetists ahead of system go-live.
SESSION OBJECTIVES	Overview of the system, covering core system functionality including searching for patients, selecting, opening and navigating through a pregnancy record. Completing care pathway questionnaires appropriate to the Obstetric Anaesthetist role.

How to Schedule Euroking Training

To ensure the success of the Euroking training it is essential to carefully consider exactly which sessions each member of staff needs to attend, following their CORE Session. If this is done efficiently and in plenty of time prior to the actual training sessions then you will be able to ensure that each delegate receives the correct training for their job role and that they are aware of when and where the training is to take place in plenty of time – thereby making Euroking training as beneficial as possible.

To help you achieve this, the following forms are required (Please refer to the enclosed EXCEL spreadsheet "Euroking Training_Scheduling_Calculator").

- Staff Training Needs   - Training Needs Summary   - Example Timetable

1) The first form *Staff Training needs* will allow you to enter each member of staff onto the form and you should then enter a '1' against each sessions that they require.

2) Once all of the training needs for each delegate have been identified you should then click on the second form *Training Needs Summary* and the totals from 'Staff Training Needs' will automatically calculate how many sessions will be required.

   Wellbeing Software recommend that if possible, the 'Total number of sessions' required should be rounded up to facilitate 2 more sessions in order to more easily enable the releasing of staff for training. For example – If based on the total number of Midwifes - 8 CORE Midwife sessions are required the Customer may decide to schedule 10 sessions time permitting.

3) Once you know the number of sessions required for each session, you can start setting up your training diary using the *Example Timetables*.

IMPORTANT - PLEASE READ

- **ASSESSING STAFF TRAINING REQUIREMENTS -** You should also be aware that in most cases, it will not be possible to train each and every user during the Euroking End-User training period. it will therefore be necessary to undertake post Go-Live cascade training to individual Users such as those who work shifts, are on holiday, or are more occasional Users. Consequently, you should aim to concentrate on scheduling formal training for staff that need to use the system constantly on a day-to-day basis, whereas more occasional Users can normally be trained on an Adhoc basis either during the initial Go-Live hand-holding period, or by System managers after this period.

- **WINDOWS KNOWLEDGE -** A pre-requisite of Euroking Training is that all Users MUST possess a basic knowledge of the Windows, and be able to use a mouse prior to attending Euroking training.

- **MAXIMUM NO OF DELEGATES –** Wellbeing Software recommend that the Customer do not attempt to exceed 8 delegates (End-Users) per session as this is proven to be the maximum number of people who can be successfully accommodated in a trainer led classroom environment.

- **BREAKS FOR THE EUROKING TRAINER -** When scheduling training please also ensure that wherever possible all training sessions are scheduled between the hours of 0900 –1700 with at least two 30 min breaks scheduled for the trainer at lunch, and in the afternoon.

Document Control

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