

Electronic Medical Records – Transition Support Program

Physician Training Requirements Guide



About this Plan

OntarioMD has created the Training Requirements Guide to help physicians and/or their staff identify the necessary training activities required to prepare themselves for the use of an EMR. Individual staff within a practice will have unique training needs and it is important to identify these needs upfront.

The requirements identified in this guide should be considered early on in the EMR Adoption Process. It is critical to understand the process around how vendors will provide training to you and your staff before you sign a contract with a vendor. For example, the following aspects of training should be taken into account during the Vendor Selection process:

- Amount of training (i.e. per hour for each staff member)
- Type of training (i.e. on-site, remotely, classroom-style, etc.)
- Cost of training (based on type identified above)

It is important to be prepared to negotiate the above factors with any vendor you choose.

This guide may be used in conjunction with advice and support from Practice Advisors and Peer Leaders. If you do not currently have a Practice Advisor or Peer Leader, please call us at 1-866-339-1233 for assistance.

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Introduction

Congratulations. You and your practice have moved to the next step in the transition to an Electronic Medical Record (EMR) – identifying your training requirements.

Implementing EMRs requires moving from the current state – paper records, to a future state – EMRs. Critical to this transition is the development of a Training Plan to establish the type of training required for each individual within your practice and how this training will be delivered. Basic computer skills, for example, are essential for all staff members to have before they can be trained on use of the actual EMR.

It is very important to document aspects of training in your contract with a vendor such as level, amount, type, cost and timelines around training. Specific staff members to be trained and the training schedule should also be included. It is important to ensure you set aside sufficient time for all staff to be trained in your practice. All staff members, including both clinical and non-clinical, need to receive some level of training and the more, the better. Scrimping on the training could perhaps save you a bit of money at the start but will inevitably cause post-implementation problems and additional costs later on. The quality of training provided directly affects how effectively you and your staff will use the EMR.

This guide identifies three key steps that are necessary to transition from identifying individual training needs to creating the training plan:

1. Assess and Identify Current Computer Skill Levels
2. Ensure All Staff have Necessary Basic Computer Skills
3. Create a Training Plan for the EMR

This Training Requirements Guide should be used to help create an overall training plan for your practice. This plan should identify each individual member within your practice, the type of training required and timelines for the training.

OntarioMD Practice Advisors are also available to assist you with this guide to help prepare you for the EMR implementation.

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There are three main steps required to ensure staff are prepared for EMR training. Templates have been provided as examples in some areas.

1. Assess and Identify Current Computer Skill Levels

As a first step, it is important to understand the current computer skill levels of staff within a practice. For example, there will most likely be some physicians and/or staff who are less tech-savvy than others. It is critical that you determine each individual's computer skills early on. To determine this, you can use a template or tool to help identify skill levels. This template should assess current basic computer skill levels for each staff member within a practice. An example of such a template is provided on the next page.

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Computer Skills Assessment Tool

Computer Skill	Yes	No	Tested
File Management – I can/am able to:			
Create and rename a folder			
Move file(s) from one folder to another			
Save and delete a file			
Find a file using a search function			
Zip and unzip a file			
Empty the recycle bin and retrieve a deleted file from the bin if necessary			
Operations – I can/am able to:			
Use the task and tool bars			
Right click the mouse to bring up special menus			
General use of a mouse			
Access computer functions through the ‘start’ button			
Shut down the computer using the ‘start’ button			
Reboot using the ‘shutdown’ function on the start button			
Minimize, restore, close and/or re-size a program’s window			
Create a shortcut to a program on the desktop			
Log on and off			
Follow password protocols			
Scan a document			
Perform basic troubleshooting (i.e. if there is a problem with the computer, being able to check to ensure all equipment is plugged in, restart computer if necessary, etc.)			
Printing Basics – I can/am able to:			
Set up a page in portrait or landscape form and use the header and footer function			
Use print preview and send a document to the printer			
Pause or delete a print job			
Change printer settings			
Set a default printer			
Email fundamentals – I can/am able to:			
Check mail, compose mail, and send a new message			
Send an attachment			
Forward mail to someone			
Set up an address book and send email to more than one address simultaneously			
Word Processing Functions – I can/am able to:			
Create and save a new document			
Save a document to a different drive			
Save a document as a different file type (i.e. PDF) or name			
Basic typing			
Check spelling and grammar in a document			
Internet Use – I can/am able to:			
Use search engines and search using keywords			
Print the screen			
Save an image to file, download, and save a file			
Reload a page			

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2. Ensure all Staff have Necessary Basic Computer Skills

Once the basic computer skills of each staff member have been identified, it is imperative to work towards training staff on the basic skills that are lacking as early on as possible. This training may occur through a course, online tool, etc. Ensure that all staff member's basic skill sets meet a minimum proficiency level prior to training on the EMR.

3a. Create a Training Plan for the EMR

A training plan should be designed based on the skills the staff currently have and those they will need to use the EMR. The following is a checklist to consider in development of your training plan:

Training Plan Consideration	Complete?	Comments
Consider having an individual within your practice assigned to coordinating activities related to training		
Establish training goals or objectives within your practice.		For example, for a specific module of the EMR, a staff member should be able to perform simple and more complex searches.
Consider staged training so staff may learn the functionality of the EMR in steps so that is not overwhelming. For example, this can involve having levels of training divided by months, i.e. Month 1 could cover the basics and more complex training could be provided in Month 3		One initial training session may not be enough. Teaching complex skills, like efficient note documentation for physicians, can be started with the initial training and then advanced with briefer updates.
Consider scheduling of training for each staff member. <u>It is important that training be uninterrupted with no disruptions (i.e. answering of phone calls, etc.).</u>		For example, ensure patient workload has been reduced for physicians during the training period.
Begin by teaching staff the common tasks that all staff will need to use and then add on complex functions based on the staff member's role (role-based training)		Based on the training needs for each staff member, consider segmented training (i.e. training that is specific to a group of common users, i.e. physicians)
Consider the best method of training delivery (i.e. on-site, remotely, classroom-style, one-on-one, hands-on training, etc.)		Sometimes vendors will provide training facilities.
Consider learning preferences of staff (i.e. on-site, remotely, classroom-style, one-on-one, hands-on training, etc.)		
Set up a designated training room or use exam rooms with computers already set up.		

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Training Plan Consideration	Complete?	Comments
Consider resources available to assist staff with training (trainers, facilities, computers, online resources, manuals, quick-reference guides, newsletters, CD-ROM, Super Users, etc.)		
Ensure the vendor provides you with a training manual for the EMR and distribute it around the practice.		Also consider other resources the vendor may provide for learning such as an online tutorial or CD.
Ensure the vendor provides you with a detailed training plan and work in conjunction with the vendor to establish training needs that best suits your practice's needs		Ensure timelines for training are clearly identified.
For group practices, it is important to consider the establishment of "Super Users". There should be super users representing the different areas of your practice (i.e. clinical, administrative, etc.)		These Super Users should be used to train the rest of the staff or address issues as they arise.
For group practices, ensure you have a mechanism in place to track who has completed training		
It is important to ensure that all equipment has been installed in your practice before the training occurs.		

3b. Provided By The Vendor (Vendor Training)

There are specific issues around vendor training that must be addressed within the contract with a vendor to ensure training is provided to your staff appropriately. It is important to ensure the following points are understood prior to selecting your vendor and included in a contract with a vendor:

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Points to Consider:

- Has the vendor addressed how, where and when training will be conducted (i.e. remotely, in-person, classroom setting, etc.)? Has this information been documented in the contract?
- Has the vendor addressed costs for each type of training (i.e. remotely, in-person, etc.), including any travel costs?
- Does the vendor provide an opportunity for hands-on training by staff?
- Has the vendor documented the number of hours allocated for training for each individual staff member within the contract?
- Have training timelines and associated costs been considered and documented in contract? Any option for advanced training or refresher training? (i.e. refresher training to occur in Month 3, Month 6, etc.)
- Does the contract include a clause around trainers that allows for a trainer to be replaced should the trainer not be effective for your practice?
- Ensure there is a plan in place to provide training to staff in the following areas:
 - * Demographics
 - * Scheduling
 - * Billing
 - * Notes
 - * Messaging
 - * Searching
 - * Reminders and Alerts
 - * Scanning
 - * Lab Results Management
 - * Preventative Care

3c. Post-Training Considerations

For consideration of future training options (potentially for new staff that join your practice), consider conducting an evaluation of the training that was provided to you and your staff. This evaluation can be conducted as a survey, for example, and should consider whether staff liked the trainers and if overall goals were achieved.

As you go through the training process, keep in mind future training needs for new users. What worked this time and what did not? Consider using this information for future staff that join your practice or potential future training around system changes.