TRAINING PROJECT

Ulises Musseb
Philadelphia FIGHT

HIV/AIDS Service Organization

Comprehensive Health and Social Services

- Jonathan Lax Health Center
- Behavioral Health Services
- Project T.E.A.C.H. Education Project
- AIDS Library
- Institute for Community Justice
- Counseling and Testing Dept.
- Youth Empowerment Project
- Critical Path Internet Project

1

ANALYSIS:
TECHNOLOGY UPGRADES
NEW POLICY REENFORCEMENT

NEW!

Software, Policies and Procedures
Windows 7
HIPAA
Health Insurance Portability & Accountability Act
PrimeSUITE
The Power of One
GREENWAY
Microsoft Word 2010
Microsoft Excel 2010

2

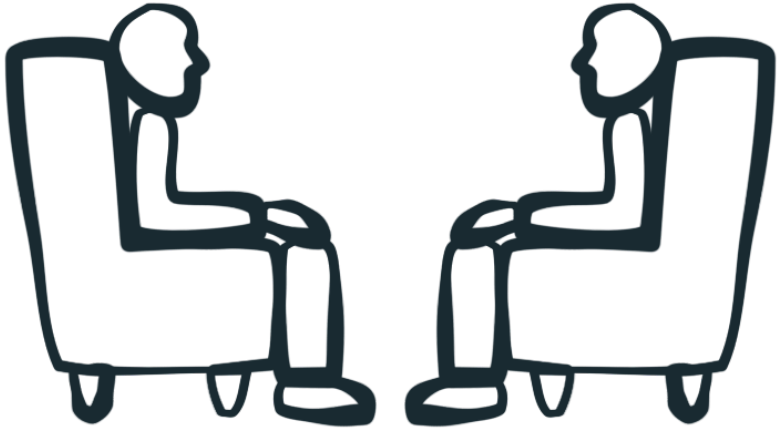
NEEDS ASSESSMENTS

A D D I E

Staff

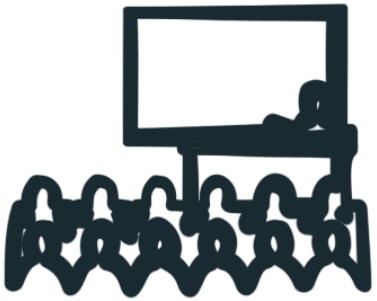
Trainers

Help Desk



Interviews

Surveys



Focus Groups

time for feedback
The IT Department Director
Other Department Directors
Director of Education
CP Trainers

PRIMESuite ON DEMAND

GREENWAY
What is Your Experience?

Integrated Electronic (EHR), Practice Manage... ...perability Solution

Postponed

PrimeSuite On D...

complete web-base...

PrimeSuite, a fully integ...

electronic health record (EH...

practice management, and

interoperability solution.

PrimeSuite® 2008
CCHIT CERTIFIED 08
Ambulatory EHR
+ Cardiovascular Medicine
+ Child Health

On Demand ...

END-USER SURVEYS

Lickert scale and open-ended questions – In print

Microsoft Windows 7 and Internet Assessment

Department: _____ **Date:** _____

This survey is intended to measure your basic knowledge of Windows 7 and basic use of the Internet. We appreciate your help. To preserve your confidentiality, please do not put your name on the survey. The following is a list of tasks that you can accomplish with Windows 7, and some knowledge of using the Internet. Please check the option that corresponds to your level of skill, knowledge or comfort using each one of the listed features.

	Don't know	Maybe with help	I know
Log On to Windows 7	☐	☐	☐
Identify the components of the Windows 7 Desktop	☐	☐	☐
Work with Windows	☐	☐	☐
Access the Help and Support Feature	☐	☐	☐
Log Off Windows 7	☐	☐	☐
Turn Off the Personal Computer	☐	☐	☐
Use and Customize the Start Menu	☐	☐	☐
Use and Customize the Taskbar	☐	☐	☐
Personalize the Desktop	☐	☐	☐
Navigate to Folders Using Windows Explorer	☐	☐	☐
Create Folders and Files	☐	☐	☐
Copy Folders and Files	☐	☐	☐
Move Folders and Files	☐	☐	☐
Rename Folders and Files	☐	☐	☐
Delete Folders and Files	☐	☐	☐
Restore Folders and Files	☐	☐	☐
Secure Folders and Files	☐	☐	☐
Search for Folders and Files	☐	☐	☐
Work with the Calculator	☐	☐	☐
Capture Screens Using the Snipping Tool	☐	☐	☐
Browse Websites Using a Web Browser	☐	☐	☐
Manage Bookmarks/Favorites	☐	☐	☐
Manage History	☐	☐	☐
Configure Pop-Up Settings	☐	☐	☐
Configure Internet Security and Privacy Settings	☐	☐	☐

(continue in the back)

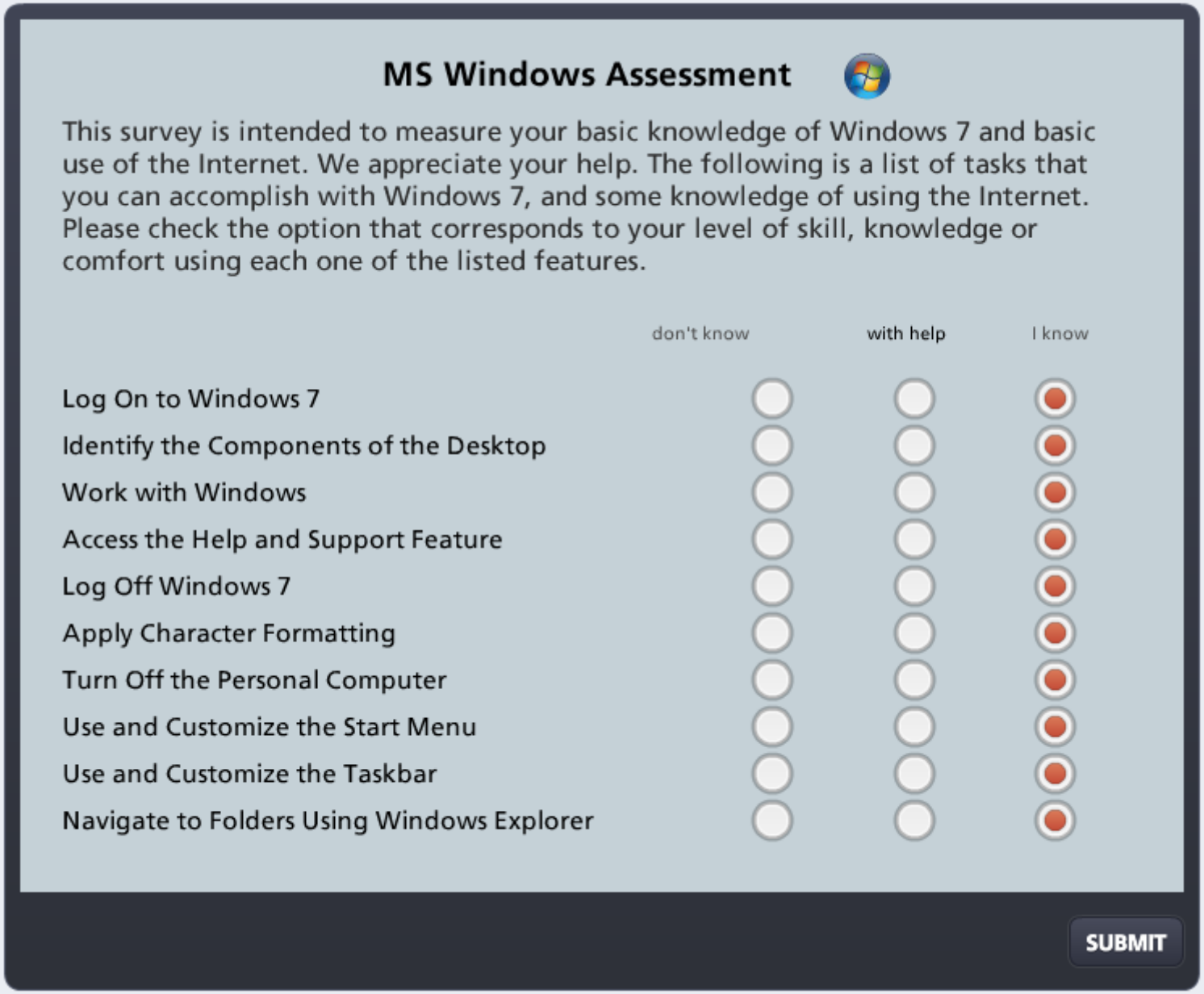
Microsoft Windows 7 and Internet Assessment (continued)

Please answer the following questions:

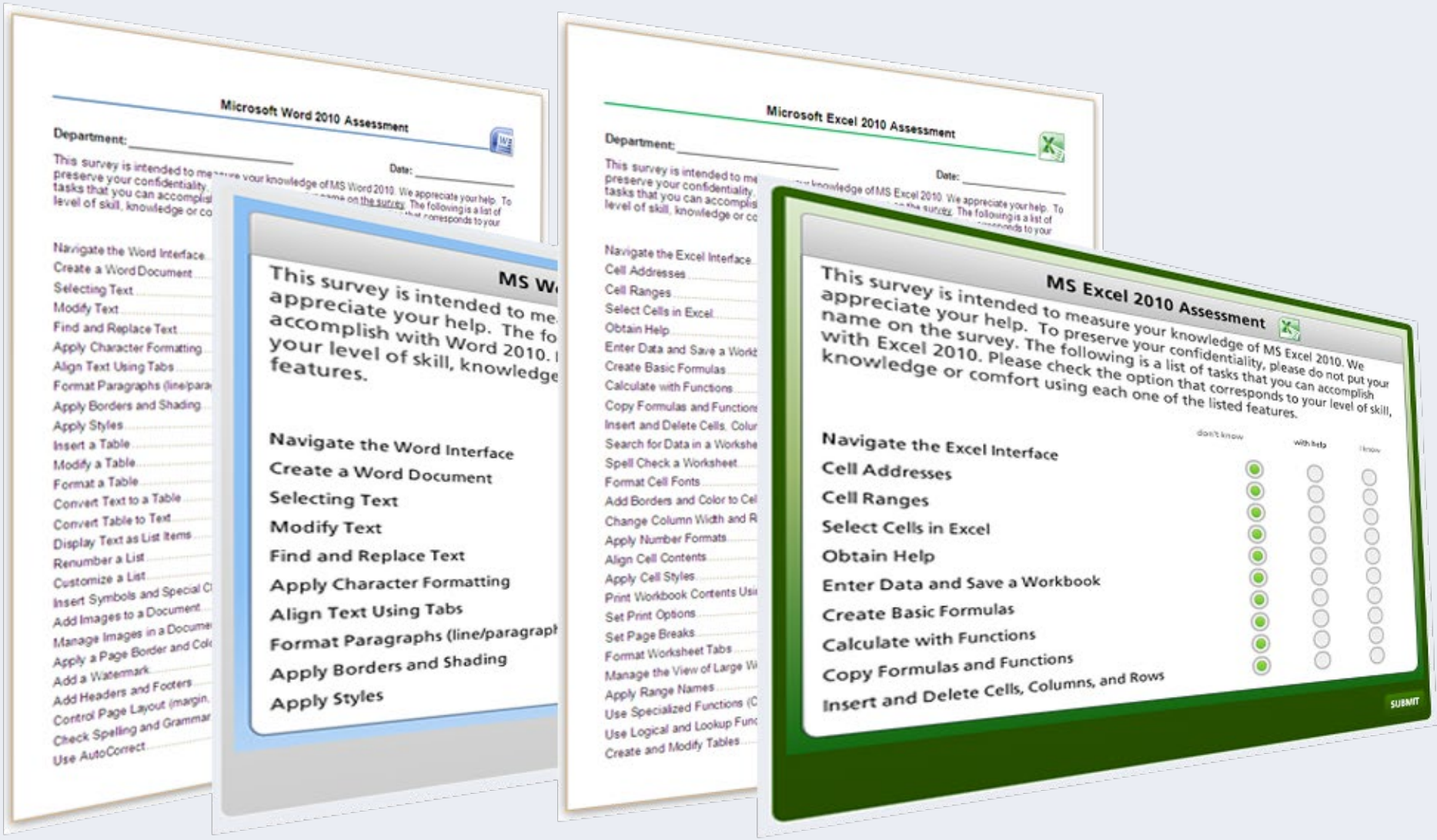
1. What do you use your computer for? _____
2. In addition to basic Windows 7 and the Internet, what other computer-related training are you interested in? _____
3. What improvements in our computer system can we make to help you perform your tasks more effectively? _____
4. Besides formal classroom training on Windows 7 and the Internet, what other computer support would you like offered to you? _____
5. Are you willing to participate in a focus group or in-person interview regarding your needs for improving your computer skills? _____
6. Please write any additional comments or questions here. _____

Thank you for taking the time to complete this survey.

Lickert scale and open-ended questions – Electronic version



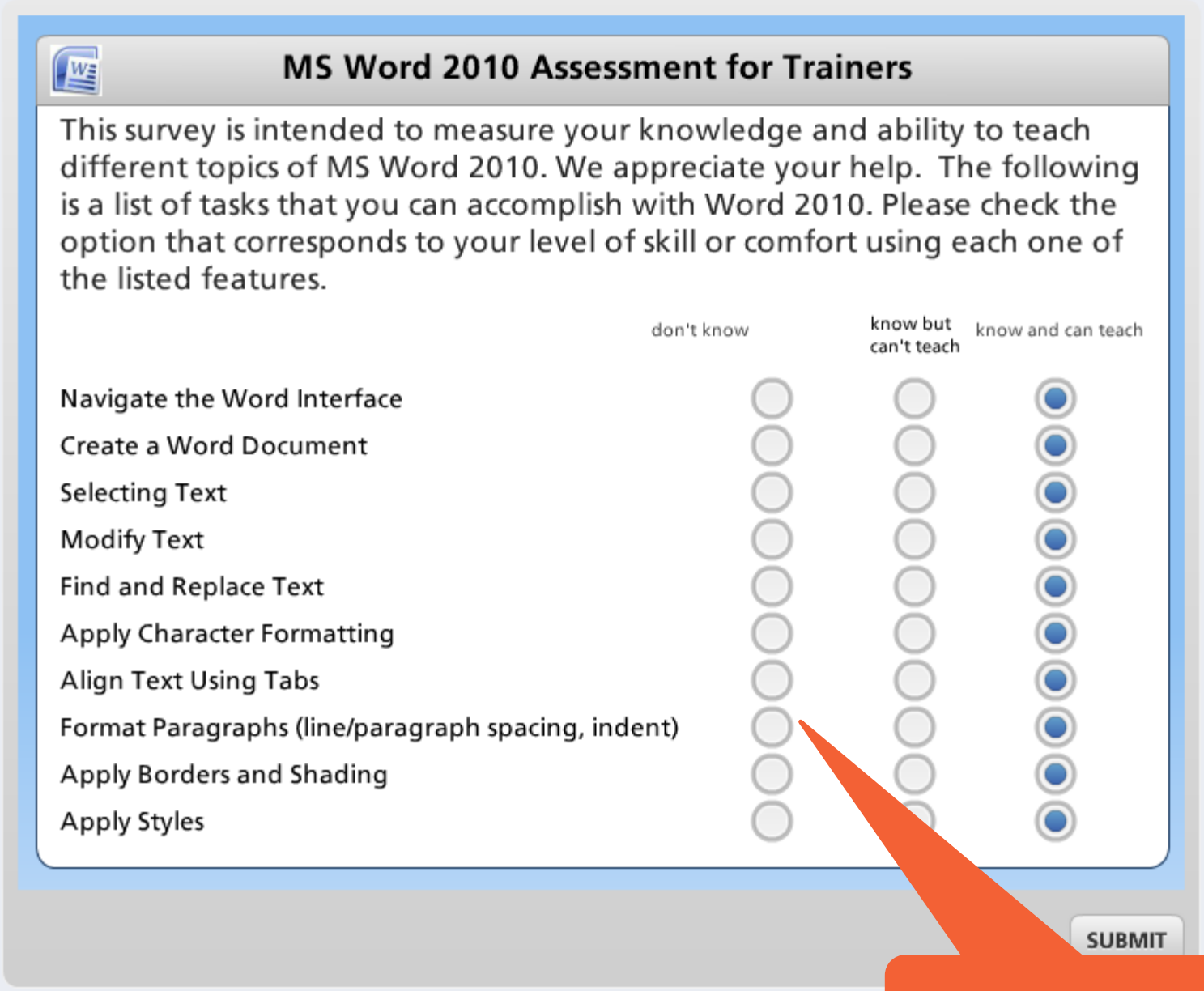
Lickert scale and open-ended questions – Word and Excel



HIPAA policies and procedures training is mandatory.

TRAINERS AND SUPPORT STAFF SURVEYS

Lickert scale – electronic version only



Checklist – In print

Training Preparation Checklist

Confirm Attendees

- Obtain roster of attendees for training session. ☐
- Have all the pre-assessment forms. ☐
- Have all the post-assessment forms. ☐
- Have all students' additional information (i.e., email addresses, user accounts/passwords if needed) ☐

Training Room Equipment

- Ensure room is easy for trainees to locate (e.g., make signs, if necessary). ☐
- Prepare to point out items such as restrooms and water. ☐
- Ensure lighting is appropriate for activities such as note taking, viewing of audio-visual aids, and hands-on computer training. ☐
- Ensure any sound distractions are eliminated or minimized. ☐
- Ensure temperature is comfortable for trainees and cool enough for equipment. ☐
- Arrange furniture to allow all trainees to see the trainer and audio-visual aids. ☐

Software

- Ensure system security is correctly established for all trainees. ☐
- Ensure that all exercise files are in the computers. ☐
- Ensure that all the software is installed and working. ☐
- Ensure that all the software versions and settings in all the computers are the same. ☐

Equipment

- Ensure all workstations are in place and working properly. ☐
- Ensure printer is working properly (e.g., adequate paper and toner). ☐
- Ensure overhead projector is working properly (e.g., focus and bulb works). ☐
- Ensure large screen projector is working properly (e.g., focus and bulb works). ☐
- Ensure flip chart has adequate paper and flip chart stand is steady. ☐

Audio-Visual Materials

- Photocopy handouts, including extra copies. ☐
- Arrange handouts in order of use. ☐
- Ensure training materials are in place (e.g., presentation notes). ☐
- Secure any additional trainee materials (e.g., User Manual). ☐
- Ensure any posters are taped in the location desired. ☐
- Ensure visual aids are visible from the back of the room. ☐

Trainer Supplies - Confirm that the following supplies are available:

- Spare lamps for projection equipment. ☐
- Color marking pens ☐
- White board pens. ☐
- White board eraser ☐
- Pens and tablets of paper. ☐
- Name cards or tags for trainees ☐
- Masking tape. ☐
- Extra flip chart pad ☐
- Extension cord. ☐

For support staff

RESULT

Knowledge is not the issue
LACK OF SUPPORT IS

HIPAA

Health Insurance Portability & Accountability Act

Mandatory for all staff

Mandatory for some staff; optional for all others

Microsoft® Word 2010

Level 1

Level 2

Microsoft® Excel 2010

Level 1

Level 2

A

D

D

I

E

IN SUMMARY

Learners: all non-profit staff with a wide range of computer and academic literacy.

Desired outcome: HIPAA compliance, consistent, efficient and effective use of the computer system

Delivery options: Classroom with additional helpdesk support and a LMS with an online resource library

Adult Learning Theory considerations: Combination of visual, aural and kinesthetic approaches

Timeline for project completion: October 31st 2013

3

TRAINING PLAN

RESOURCES & LOGISTICS

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E

Staff

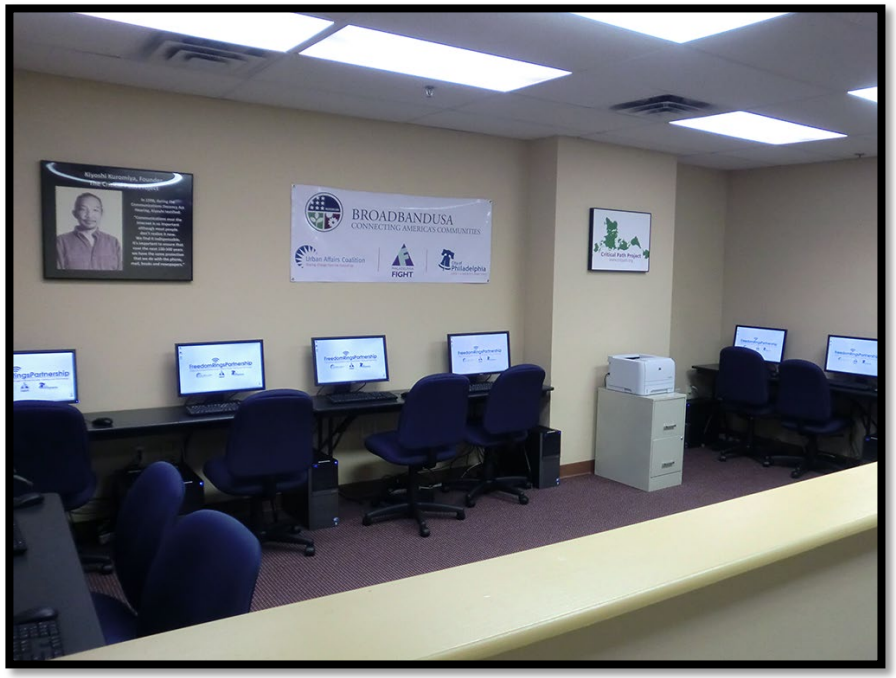
Trainers

Help Desk

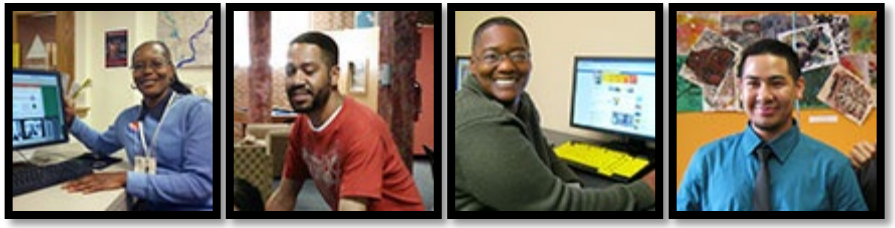
MAIN OBJECTIVES

- Use MS Word 2010 proficiently
- Use MS Excel 2010 proficiently
- Integrate HIPAA regulations in everyday use of the computer (file creation, email, lists, forums, etc).
- Understand and apply FIGHT's policies and procedures regarding Internet wireless connections, use of the Internet, streaming and proper use of adult material for educational purposes.

RESOURCES



The facilities



The talent

MS Word 2010 Level 1

This is a hands-on course. Upon completion of this class, employees will be able to make effective use of Microsoft Word 2010 in a professional non-profit environment. Participants will gain an understanding of the basic features of Word 2010.

The course emphasizes day-to-day operations with the purpose of increasing productivity and proficiency using Word 2010. Additionally, the course will integrate specific policies regarding use of existing templates and pre-designed documents and Philadelphia FIGHT forms.

Prerequisites: Working knowledge of computers skills. The course is for beginners. It teaches the core basic level of Microsoft Word. Information about enrollment and available times for this class is available in our Critical Path web Portal, or contact our helpdesk by email at info@critpath.org or by phone at ext. 145.

Word 2010 Level 1 Outline

Lesson 1: Getting Started with Word

- Identify the Components of the Word Interface
- Create a Word Document

Lesson 2: Editing a Document

- Selecting Text
- Modify Text
- Find and Replace Text

Lesson 3: Formatting Text and Paragraphs

- Apply Character Formatting
- Align Text Using Tabs
- Control Paragraph Layout
- Apply Borders and Shading
- Apply Styles

Lesson 4: Adding Tables

- Insert a Table
- Modify a Table
- Format a Table
- Convert Text to a Table
- Convert Table to Text

Lesson 5: Managing Lists

- Display Text as :List Items
- Sort a List
- Renumber a List
- Customize a List

Lesson 6: Inserting Graphic Objects

- Insert Symbols and Special Characters
- Add Images to a Document
- Manage Images in a Document

Lesson 7: Controlling Page Appearance

- Apply a Page Border and Color
- Add a Watermark
- Add Headers and Footers
- Control Page Layout (margin, orientation, etc)

Lesson 8: Proofing a Document

- Check Spelling and Grammar
- Other Proofing Tools

Lesson 9: Customizing the Word Environment

- Customize the Quick Access Toolbar
- Additional Save Options

Name and Description

List of Topics

TRAINING PLAN

MS Excel 2010 Level 1

This is a hands-on course. Upon completion of this class, employees will be able to use and apply basic Microsoft Excel 2010 features in a professional non-profit environment. Additionally, participants will gain an understanding of the different uses of Excel 2010 and how Excel can be used with other applications.

The course emphasizes day-to-day operations with the purpose of increasing productivity and proficiency using Excel 2010. The course will integrate specific FIGHT policies regarding use of existing templates, data access and storeage.

Prerequisites: Working knowledge of computers skills. The course is for beginners. It teaches the core basic level of Microsoft Excel. Information about enrollment and available times for this class is available in our Critical Path web Portal, or contact our helpdesk by email at info@critpath.org or by phone at ext. 145.

Excel 2010 Level 1 Outline

Lesson 1: Getting Started with Microsoft Excel

- Navigate the Excel Interface
- Create a Basic Worksheet
- Cell Addresses
- Cell Ranges
- Select Cells in Excel
- Enter Data and Save a Workbook
- Obtain Help

Lesson 2: Performing Calculations

- Create Basic Formulas
- Calculate with Functions
- Copy Formulas and Functions

Lesson 3: Modifying a Worksheet

- Insert and Delete Cells, Columns, and Rows
- Search for Data in a Worksheet
- Spell Check a Worksheet

Lesson 4: Formatting a Worksheet

- Format Cell Fonts
- Add Borders and Color to Cells
- Change Column Width and Row Height

Lesson 4 (continued)

- Apply Number Formats
- Align Cell Contents
- Apply Cell Styles

Lesson 5: Printing Workbook Contents

- Print Workbook Contents Using Default Print Options
- Set Print Options
- Set Page Breaks

Lesson 6: Managing Large Workbooks

- Format Worksheet Tabs
- Manage the View of Large Worksheets
- Apply Range Names

Lesson 7: Customizing the Excel Environment

- Customize General and Language Options
- Customize Formula Options
- Customize Proofing and Save Options
- Customize the Ribbon and Quick Access Toolbar
- Customize the Functionality of Excel by Enabling Add-Ins
- Customize Advanced and Trust Center Options

8 hours

Demonstration

Assisted exercise

Unassisted exercise

Instructor feedback

HIPAA AND POLICIES TRAINING REDESIGN

Lunch-and-Learn

A D D I E

Staff

Trainers

Help Desk

OBJECTIVES

- Prepare classroom for computer training
- Deliver computer training, linking ideas and topics covered with students day-to-day tasks
- Engage all students in training activities
- Implement media and online resources in computer training
- Administer pre/post-assessments

Train the Trainer Outline

Upon completion of this course you will understand the basics of delivering computer training. You will build a repertoire of training techniques, improve your facilitation skills and develop an understanding of how group roles emerge, how to make observations, and how ask the right questions during a training session. In addition, we will explore providing and receiving constructive feedback and how to handle specific training situations.

The course is for Critical Path Trainers (optional to support staff). It teaches the core basic facilitation and training skills. This is a one-day (8 hour) training. Additional information and materials are available in our Critical Path web Portal, or contact Ulises Musseb at xxxxx@fight.org or at ext. XXX.

The Qualities of an Excellent Computer Trainer

- Training versus Presenting

Training Preparation

- Personal Preparation
- Training Preparation
- Who Are Our Students?

Classroom Preparation

- The Trainer Checklists
- Enrollment
- Pre Data Collection
- Pre-assessment

Conducting the Training

- Introductions
- Presentation – The Workflow
- Presentation - Your Resources

Choosing Courseware

- Presentation - Linking Ideas
- Presentation - Engaging Students
- Additional Strategies to Engage Learners
- On Using Humor
- Case Studies and "Mind Breaks"

E-Learning Implementation

- When is E-learning Adequate?
- Planning for E-Learning
- Designing for E-learning
- E- learning Structure Guidelines
- Navigation Guidelines for E-Learning
- Font Use Guidelines for E-Learning
- Paragraph layout Guidelines for E-learning
- Media Quality for E-Learning

Post-assessments and Evaluations

- Post-assessments
- Evaluations
- Data Reporting

The Training Shadowing Session

Training Resources

- For Your Development
- For Your Classes
- For the Program

8 hours

Demonstration

Individual activities

Group Activities

Instructor feedback

A D D I E

Staff

Trainers

Help Desk

OBJECTIVES

- Obtain instructions of their role in the training project
- Prepare classrooms, equipment and materials for computer training
- Handle technical problems properly (hardware/software)
- Create user accounts in the LMS
- Answer questions or refer to other parties for support

MEETINGS AND ACTIVITIES

enrollment

equipment

software

av materials

online media

support

A D D I E

IN SUMMARY

Instructional Strategy: Train-the-Trainer, support staff orientation and Classroom training with LMS and helpdesk support.

User Interface: Formal classroom activities, LMS with video tutorials, social media and downloadable materials

Participation in Lunch-and-Learn Activities

4

TRAINING DEVELOPMENT

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Staff

Trainers

Help Desk

Handouts
Live support
Online resources
LMS
Classroom

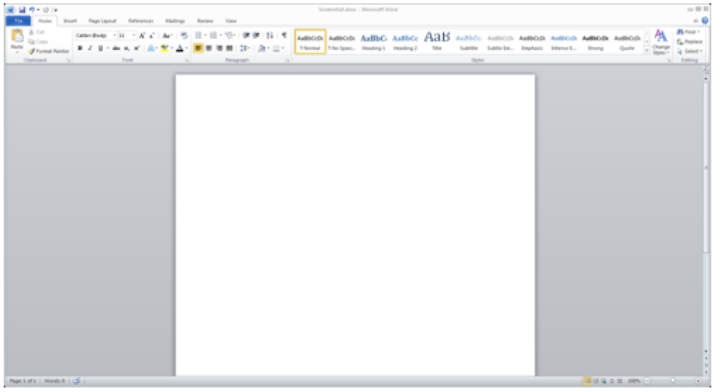
Sample MS Word Handout

Short and simple

Lesson 1: Getting Familiar with Microsoft Word 2010 for Windows

Microsoft Word is a word processing software package. You can use it to type letters, reports, and other documents. This tutorial teaches Microsoft Word 2010 basics. Although this tutorial was created for computer beginners, because Microsoft Word 2010 is so different from previous versions of Microsoft Word, even experienced users may find it useful.

This lesson will introduce you to the Word window. You will use this window to interact with Word. To begin this lesson, open `Microsoft Word 2010`. The Microsoft Word window appears and your screen looks similar to the one shown here.



MS Word Window

Your screen will probably not look exactly like the screen shown above. In Word 2010, how a window displays depends on the size of your window, the size of your monitor, and the resolution to which your monitor is set. Resolution determines how much information your computer monitor can display. If you use a low resolution, less information fits on your screen, but the size of your text and images are larger. If you use a high resolution, more information fits on your screen, but the size of the text and images are smaller. Also, Word 2010, Windows Vista, and Windows XP have settings allow you to change the color and style of your windows.

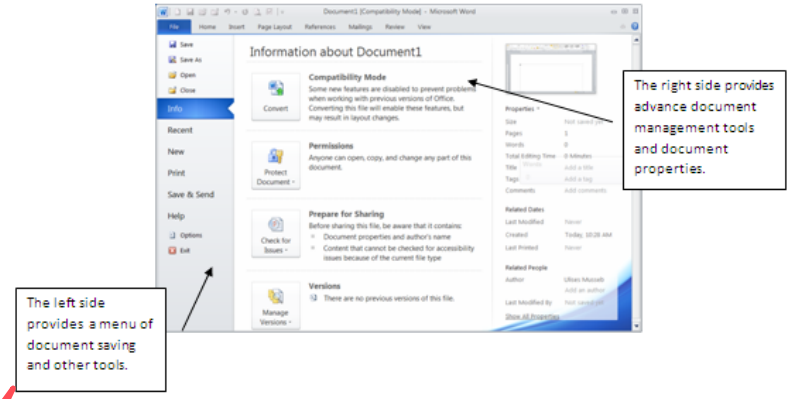
Identify key components

The File Tab

In the upper-left corner of the Word 2010 window is the `File` tab. It replaces the Microsoft Office button from previous versions of MS Word.

The File Tab

When you click the `File` tab, an entire settings page appears as shown below.



The File and Document Page

You can use the menu on the left side to create a new file, open an existing file, save a file, and perform many other tasks. The tools shown on the right side of the page allows you to add different setting to your documents. Those settings will be covered in the advanced class.

The Quick Access Toolbar

On the very top of the left-hand side of your window you will find your `quick access toolbar`, shown below.

The Quick Access Toolbar

Illustrated

Use fonts to identify features

Lesson Authoring Tools

articulate STORYLINE

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Initializing commands...

TANIDA Demo Builder 9

9.0.0.7

Teemu Jukkara © 2012 Tanida

TANIDA QUIZ BUILDER 1

TANIDA QUIZ BUILDER

Tutorial Library

Documents, forms and presentations

SurveyMonkey.com

LMS and
Data Collection

Sample End of Class Evaluation

Can they do it?

Specific questions, focused on instructor performance

MS Word 1

Student Evaluation

Philadelphia FIGHT

Instructor Name _____

Date: _____

About the Class:

	Not at all	A little	Somewhat	Plenty	A lot
How clear is your understanding of the following:					
I know how to open and close Word.	1	2	3	4	5
I know how to create a document in Word.	1	2	3	4	5
I know how to enter and change text.	1	2	3	4	5
I know how to format paragraphs.	1	2	3	4	5
I know how to format a page.	1	2	3	4	5
I learned what I wanted to learn	1	2	3	4	5
I will use MS Word more now.	1	2	3	4	5
I found the course valuable.	1	2	3	4	5
I found what I learned is important and relevant.	1	2	3	4	5
The handouts and exercise files were useful.	1	2	3	4	5

What were the **most useful** parts of the course information for you? _____

What were the **least useful** parts of the course (if any)? _____

What did you think about how the lessons were organized? _____

Did they learn it?

Did they like it?

About the Instructor:

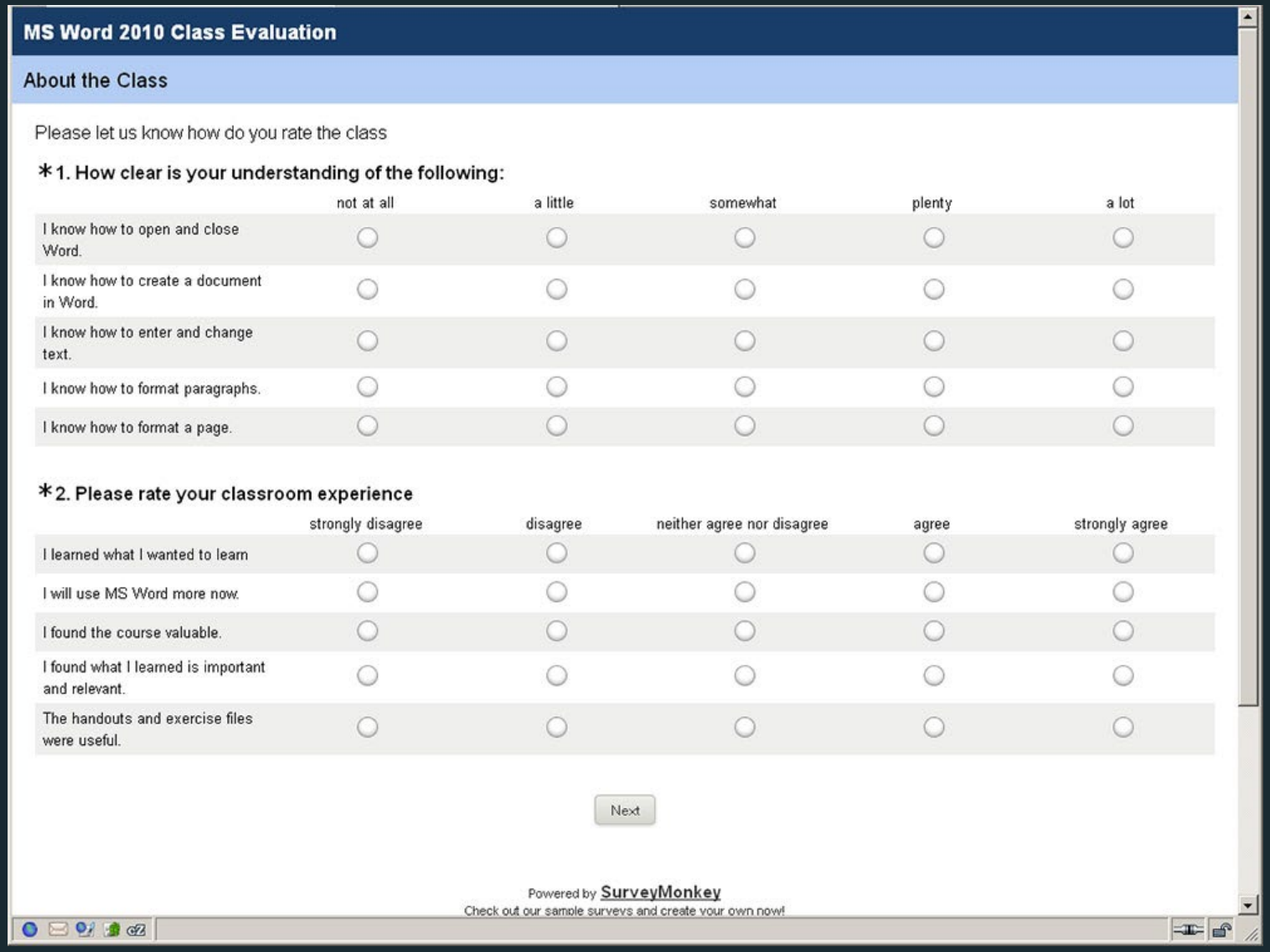
	Not at all	A little	Somewhat	Plenty	A lot
The Instructor knows the subject well.	1	2	3	4	5
The Instructor was clear and understandable.	1	2	3	4	5
The Instructor was organized.	1	2	3	4	5
The Instructor answered my questions.	1	2	3	4	5
The Instructor provided feedback during exercises.	1	2	3	4	5

What did you like about the way the instructor taught the course? _____

What did you dislike about the way he/she taught the course? _____

Is there anything else you would like the instructor to know about your experience in the course? _____

Lickert scale and open-ended questions – Electronic version



MS Word 2010 Class Evaluation

About the Class

Please let us know how do you rate the class

***1. How clear is your understanding of the following:**

	not at all	a little	somewhat	plenty	a lot
I know how to open and close Word.	○	○	○	○	○
I know how to create a document in Word.	○	○	○	○	○
I know how to enter and change text.	○	○	○	○	○
I know how to format paragraphs.	○	○	○	○	○
I know how to format a page.	○	○	○	○	○

***2. Please rate your classroom experience**

	strongly disagree	disagree	neither agree nor disagree	agree	strongly agree
I learned what I wanted to learn	○	○	○	○	○
I will use MS Word more now.	○	○	○	○	○
I found the course valuable.	○	○	○	○	○
I found what I learned is important and relevant.	○	○	○	○	○
The handouts and exercise files were useful.	○	○	○	○	○

Next

Powered by SurveyMonkey

Check out our sample surveys and create your own now!

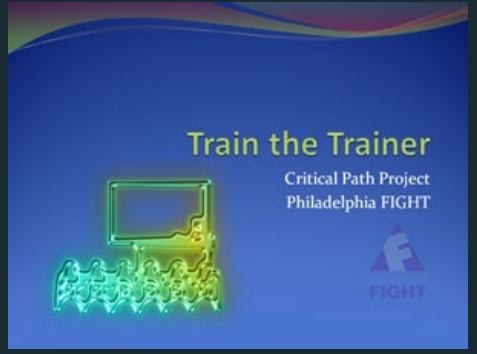
A D D I E

Staff

Trainers

Help Desk

TRAIN THE TRAINER



Conducting the Training

Presentation – The Workflow

As explained earlier, lecturing people does not constitute proper computer training. In order to receive an effective training, students need visual aids, interest, clarity, interaction and variety. The way the material is presented is as important as the material itself.

Though there are many ways to teach a computer class, the process of explaining computer concepts effectively can be summarized in four major procedures: Overview of the concept, Assisted exercise, Review and clarification and Unassisted exercise.

The four steps to effective computer training

In between each step, the trainer should always check for understanding. It's not recommended, for example, to start an assisted exercise without students knowing the purpose of what they are doing or without complete knowledge of the concept.

- Overview of the concept - Provide a brief overview of the concept(s) and how it fits into the big picture. Make sure that they understand the core concepts before start explaining how to apply it.
- Assisted exercise (demonstration) - Consider this portion an "assisted exercise", one where the entire group performs or applies the previously explained concept by using the necessary software features to accomplish a specific task.
- Review and clarification - This is a preliminary check of their understanding. Here' you can review what they just did in the software. Here you can summarize the steps involved in completing the tasks, or repeat the steps if appropriate. This is the perfect time to ask questions.
- Unassisted exercise - Consider this portion an "unassisted exercise" where they apply the new concept and practice on their own. By monitoring this exercise or "test", you can see what/if they have really learned during the lesson. This portion can be used to determine if your delivery is effective, or if you need to adjust your style or your pace.

Presentation - Your Resources

Your exercises, examples, materials, equipment and any other resources you are using in your classroom should be:

Legible – It is recommended that handouts, workbooks and any other visual aids are easy to read for the learners.

Simple – Select or create materials that concentrate in the given concept, that is, avoid materials that create distractions or involve more skills that the minimum required for your lesson objective.

Consistent – Even if the sources of information are different, it's possible to

A D D I E

Staff

Trainers

Help Desk

Checklist – In print

Training Preparation Checklist

Confirm Attendees

- Obtain roster of attendees for training session. ☐
- Have all the pre-assessment forms. ☐
- Have all the post-assessment forms. ☐
- Have all students' additional information (i.e., email addresses, user accounts/passwords if needed) ☐

Training Room Equipment

- Ensure room is easy for trainees to locate (e.g., make signs, if necessary). ☐
- Prepare to point out items such as restrooms and water. ☐
- Ensure lighting is appropriate for activities such as note taking, viewing of audio-visual aids, and hands-on computer training. ☐
- Ensure any sound distractions are eliminated or minimized. ☐
- Ensure temperature is comfortable for trainees and cool enough for equipment. ☐
- Arrange furniture to allow all trainees to see the trainer and audio-visual aids. ☐

Software

- Ensure system security is correctly established for all trainees. ☐
- Ensure that all exercise files are in the computers. ☐
- Ensure that all the software is installed and working. ☐
- Ensure that all the software versions and settings in all the computers are the same. ☐

Equipment

- Ensure all workstations are in place and working properly. ☐
- Ensure printer is working properly (e.g., adequate paper and toner). ☐
- Ensure overhead projector is working properly (e.g., focus and bulb works). ☐
- Ensure large screen projector is working properly (e.g., focus and bulb works). ☐
- Ensure flip chart has adequate paper and flip chart stand is steady. ☐

Audio-Visual Materials

- Photocopy handouts, including extra copies. ☐
- Arrange handouts in order of use. ☐
- Ensure training materials are in place (e.g., presentation notes). ☐
- Secure any additional trainee materials (e.g., User Manual). ☐
- Ensure any posters are taped in the location desired. ☐
- Ensure visual aids are visible from the back of the room. ☐

Trainer Supplies - Confirm that the following supplies are available:

- Spare lamps for projection equipment. ☐
- Color marking pens ☐
- White board pens. ☐
- White board eraser ☐
- Pens and tablets of paper. ☐
- Name cards or tags for trainees ☐
- Masking tape. ☐
- Extra flip chart pad ☐
- Extension cord. ☐

It's a directive, not a training

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IN SUMMARY

Project's instructional, visual and technical design strategy was created.

Applied instructional strategies according to the intended outcomes.

Design the user interface and user experience (classroom and online)

Created training branding and design

5

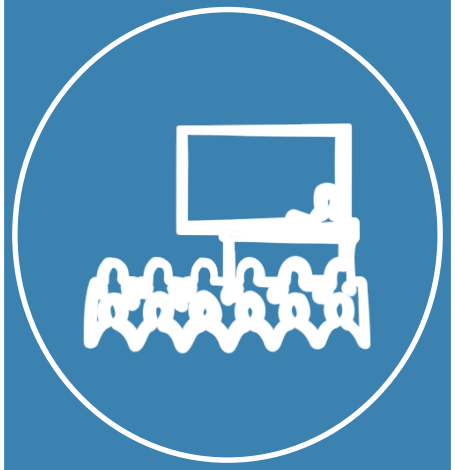
TRAINING IMPLEMENTATION

A D D I E

Staff

Trainers

Help Desk



Train the Trainer

Helpdesk Orientation

Test-Run (shadowing)

Support System and LMS

EVALUATION EVALUATION EVALUATION

SCHEDULE/PRIORITIES
AVAILABILITY OF FACILITIES
INTEREST/ATTITUDE

6

TRAINING EVALUATION

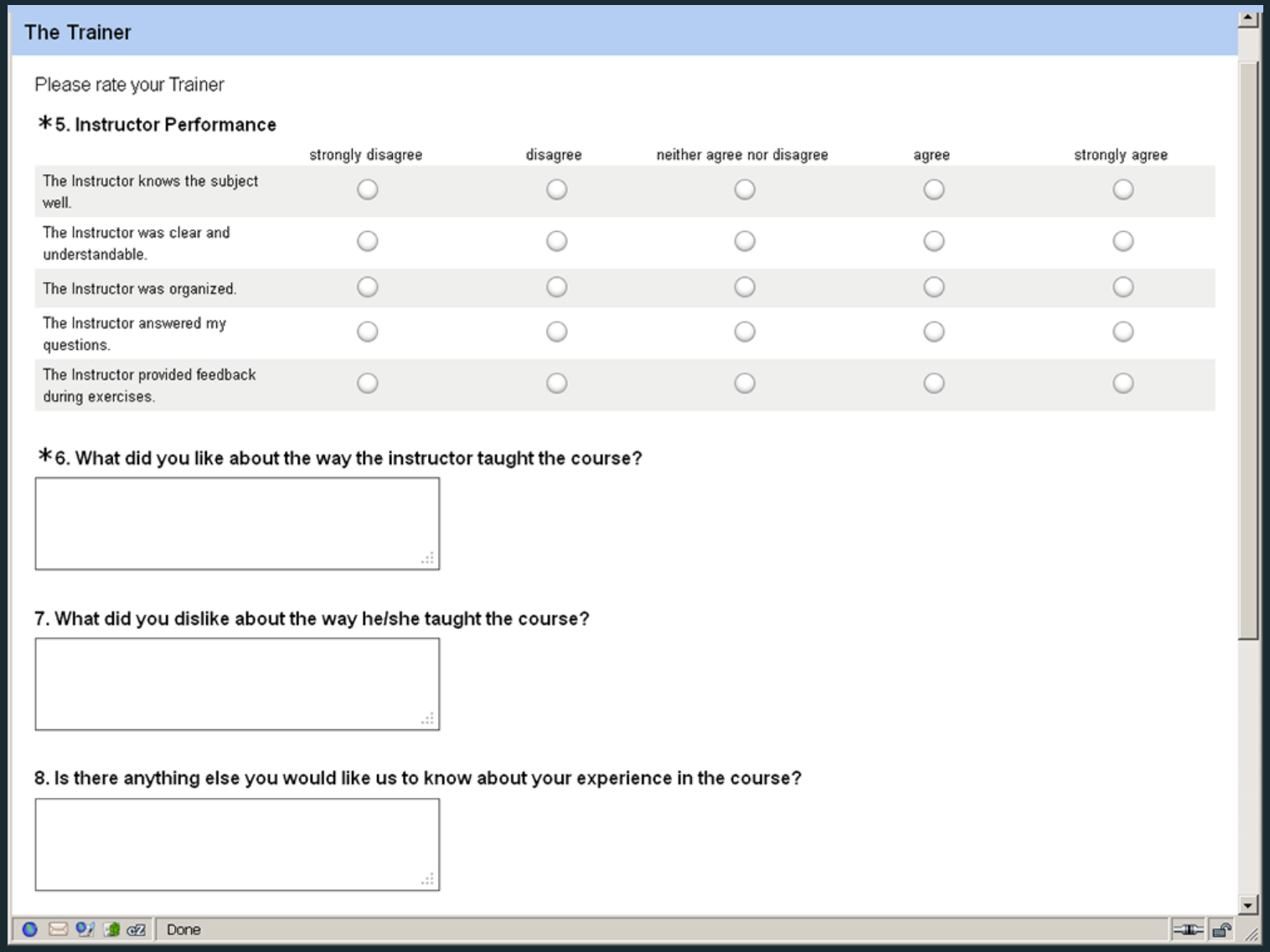
A D D I E

Staff

Trainers

Help Desk

Lickert scale and open-ended questions – Electronic version



The Trainer

Please rate your Trainer

***5. Instructor Performance**

	strongly disagree	disagree	neither agree nor disagree	agree	strongly agree
The Instructor knows the subject well.	○	○	○	○	○
The Instructor was clear and understandable.	○	○	○	○	○
The Instructor was organized.	○	○	○	○	○
The Instructor answered my questions.	○	○	○	○	○
The Instructor provided feedback during exercises.	○	○	○	○	○

***6. What did you like about the way the instructor taught the course?**

7. What did you dislike about the way he/she taught the course?

8. Is there anything else you would like us to know about your experience in the course?

Done

A
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D
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Staff

Trainers

Help Desk

Formative assessments in an informal setting will help
modify learning activities to improve learner attainment.

Thank you.