CORE CRIS
Cascade Training Overview

Training Department

2022

Table of Contents

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Confidentiality

Introduction

Purpose

The purpose of this document is to provide a complete overview of the CRIS 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 CRIS Cascade Training for use by Cascade Trainers.

Scope

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 CRIS consultancy or training both in order to fully appreciate the requirements of the CRIS Cascade Training approach and to complete the actions required by the Customer in order to enable CRIS training to be delivered as effectively as possible.

CRIS Cascade Training Timeline

ACTION ONE – TRAINING NEEDS ANALYSIS & SYSTEM OVERVIEW WORKFLOW DISCUSSIONS			
WEEK 1	**WEEK 2 - 3**	**WEEK 4**	**WEEK 5**
▪ 1ST TRAINING CONTACT ▪ PROPOSED DATES	▪ BOOK ROOMS ▪ CONFIRM DATES ▪ CONSIDER DELEGATES ▪ RETURN WORKFLOW DOCUMENT	▪ 1ST MEETING / WEBEX ▪ INITIAL TNA ▪ CRIS END TO END SYSTEM OVERVIEW ▪ WORKFLOW DISCUSSION	TRUST PLANNING
WELLBEING SOFTWARE	CUSTOMER	ALL	CUSTOMER

ACTION TWO – TRUST PLANNING			ACTION THREE – CORE TRAINING		
WEEK 6	**WEEK 7**	**WEEK 8**	**WEEK 9**	**WEEK 10**	**WEEK 11**
FOLLOW-UP PROGRESS CALL	RETURN COMPLETED CHECKLISTS	READINESS TO PROCEED CALL	CORE CRIS CASCADE / TTT TRAINING PART I (2 DAYS)	(OPTIONAL) VR CASCADE TRAINING WITH CRIS REPORTING (3 DAYS)	CORE CRIS CASCADE / TTT TRAINING PART II (3 DAYS)
ALL	CUSTOMER	ALL	ALL	ALL	ALL

ACTION FOUR – TRAINING CONSOLIDATION	ACTION FIVE - END USER TRAINING	ACTION SIX – GO-LIVE
WEEK 12 – 13	**WEEK 14 - 17**	**WEEK 18**
▪ CASCADE TRAINER CONSOLIDATION ▪ END USER TRAINING FINAL PLANNING	▪ END USER TRAINING ▪ VR CASCADE & END USER VR TRAINING (IF APPLICABLE)	▪ CRIS GO-LIVE ▪ HAND-HOLDING
CUSTOMER	CUSTOMER	ALL

ACTION SEVEN – POST GO-LIVE TRAINING	ACTION EIGHT – ADDITIONAL TRAINING
WEEK 21	**WEEK 22 +**
POST GO-LIVE CRIS TRAINING ▪ SYSTEM MANAGEMENT ▪ STATISTICAL REPORTS	INCLUSIVE OR ADDITIONAL MODULES TRAINING
ALL	ALL

CRIS Cascade Training Actions Overview

ACTION 1: TRAINING NEEDS ANALYSIS & SYSTEM OVERVIEW / WORKFLOW DISCUSSION	
OBJECTIVES 1WEEK 1 – 4	**Training Needs Analysis / Consultancy & CRIS End to End System Overview / Workflow Discussion** Following the start of the project the Wellbeing Software Training Manager will contact the Customer Training Lead to provide provisional training dates, and electronic copies of all CRIS Cascade 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 Software 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 the availability of a formal Training room and relevant staff resources. This will then be formalised when the Wellbeing Software Training Manager contacts the Customer, who will be expected to confirm the Training dates and room booking in the week prior to the on-site Training Needs Analysis / Workflow Discussion in addition to returning CRIS_TRG_268_Current_Working_Practice.doc Wellbeing Software will also undertake a **'Training Needs Analysis / Consultancy and a CRIS End to End System Overview / Workflow Discussion'** with the Customer: **Training Consultancy =** The first part of this session enables a discussion regarding the CRIS 'Cascade Training' in terms of the approach Wellbeing Software would recommend the Customer undertake towards training and provides an overview of the scope of the cascade 'train the trainer' course. **CRIS End to End System Overview / Workflow Discussion =** This part of the meeting comprises a CRIS End to End System demonstration and a training needs analysis in terms of current working practice to better advise on best practice use of the system in context to site requirements derived from the completed CRIS_TRG_268_Current_Working_Practice.doc The Customer Training Contacts will need to attend the entire session, and RIS System Managers / Clerical Managers and Radiology Services Managers from each site will need to be in attendance for the PM session.
ACTIONS REQUIRED	<u>**Following the 'Initial Training Consultancy' the Customer should:**</u> **DESIGNATE DELEGATES FOR CRIS TRAINING –** Following the training consultancy the Customer

should elect a <u>minimum of 4 and maximum of 8</u> 'Delegates' who will attend CRIS 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 **RIS System Manager(s)** who will be directly involved in the deployment tasks, and pre and post go-live CRIS system configuration.

Each 'Delegate' should therefore be issued with a copy of **"Cascade Training Overview and Teaching Script"** in the week prior to CRIS Cascade Training 'Train the Trainer' sessions which will normally take place 8 – 10 weeks prior to go-live over a two week period.

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 Radiology department which may involve a period of shadowing key members of staff in Radiology 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. 2 clerical, 2 clinical. They 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 RIS 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' <u>must</u> have an understanding of the complete CRIS system to enable them to deliver training on all aspects of CRIS functionality to any type of End-User. This therefore means that following the initial 'Train the trainer' courses and 'Cascade Trainer planning period (Action 4 & 5) 'Cascade Trainers' should be able to dedicate just one or two days per week to RIS training, as the remaining week could conceivably be covered by other 'Cascade Trainers, or even scheduled to running 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 by forwarding copies of the 'CRIS Training Scheduling Documentation' to Radiology Department Managers.

This is to ensure that the Customer allows sufficient time for the Department itself to review

the CRIS courses currently available and which Wellbeing Software would recommend the 'Cascade Trainers' deliver 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 CRIS training course - thereby enabling the 'Cascade Trainers' to easily assess the volume of End-User training required and encourage the department to begin scheduling staff into a suitable End-User timetable whilst allowing the 'Cascade Trainers' themselves to continue to concentrate on planning/practising the training itself.

It should be noted that in most cases, it will not be possible to train each and every user during the CRIS 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. Consequently, 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.

Associated eLearning Modules are also available to support End user training and will be discussed with the Customer during the course of the project.

ACTION 2: TRUST PLANNING

| OBJECTIVES WEEKS 5 - 8 | **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 the **"Cascade Training Overview and Teaching Script"** 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 Radiology 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 Radiology 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 CRIS system Go-Live.

Wellbeing Software do not however recommend that 'Cascade Trainers' should themselves schedule the CRIS 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 CRIS client has been installed on the Training room PC's ahead of the practical CRIS 'Train the Trainer' Courses and CRIS '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 6 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 CRIS Cascade Training as required.

Returning Training Checklists – Wellbeing Software will supply a CORE CRIS 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 CRIS_TRG_262_CORE_Cascade_Training Checklist.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 Contact 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 RIS_PD262_Training Checklist.docx supplied by Wellbeing Software following the 1st meeting.

DELIVERED/EVALUATED CRIS '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 CRIS 'Train the Trainer' sessions in learning how to prepare a sample timetable which will then be used by the Radiology department to allocate staff for training. |

	BOOKED/RESERVED TRAINING FACILITIES ahead of the practical CRIS 'Train the Trainer' session and CRIS 'End-User' Training. TASKED 'IT' DEPARTMENT TO INSTALL THE CRIS CLIENT ahead of the CRIS Cascade Training 'Train the Trainer' session, and CRIS 'End-User' Training. Instructions on installing the CRIS client will be provided via the Wellbeing Software project manager, or via the Wellbeing Software Service Desk.

ACTION 3: CRIS CASCADE 'TRAIN THE TRAINER' SESSIONS

OBJECTIVES WEEK 9 – 11	**WEEK NINE – PART I, DAYS 1 & 2: COMPLETE CORE SYSTEM OVERVIEW (2 FULL DAYS)** Comprehensive CRIS Application Training for up to 8 delegates covering all aspects of CORE User-level system functions. 'Cascade Trainers' will then be left to review CRIS 'Train the Trainer' documentation, course guides and course objectives in addition to completing a CRIS System Workbook. This is ahead of the PART II Training Session which takes place in week 10 when the Customer Trainers have had a chance to consolidate their PART I CORE system knowledge. **WEEK TEN – CASCADE VOICE RECOGNITION & CRIS REPORTING TRAINING (IF APPLICABLE)** If the customer will be using CRIS Reporting with Dragon Voice Recognition – up to 6 Delegates who have attended Part I – Cascade Training with be trained in 6 x ½ Day 1to1 Training Sessions. This is to enable the delivery of 1to1 Reporting Clinician Training ahead of the CRIS system go-live and continue to provide on-going support for existing users and new starters post go-live. ***WEEK ELEVEN – PART II, DAY 3 - 4: CRIS TRAINING SYSTEM CONFIGURATION AND SYSTEM MANAGEMENT*** Designed to provide 4 – 6 key delegates who have attended Part I - Cascade Training (i.e. RIS Managers, Clerical Managers, Training Leads) with the knowledge required to deploy the CRIS system, or the ability to configure the CRIS Training System to facilitate End User training sessions. ***WEEK ELEVEN – PART II, DAY 5: INTRODUCTION TO STATISTICAL REPORTS*** An introduction to CRIS Statistical Reports aimed at familiarising 4 – 6 key delegates who have attended Part I - Cascade Training with this area of the system ahead of the follow-up Post Go-live Training.

	WEEK ELEVEN – PART II, DAY 6: CRIS WORKSHOP AND DELEGATE CONSOLIDATION/ASSESSMENT
	The CRIS Workshop and Delegate Consolidation/Assessment day is designed to enable all delegates to consolidate their learning by undertaking a practical End to End demonstration of CRIS System Workflow. If applicable the morning section of the session can also include a brief seminar covering 'CRIS Train the Trainer' documentation including recommended course guides and course objectives based on Wellbeing Software proven experience of delivering successful training to high volumes of Users, concluding with how to assess training requirements, schedule timetables and deliver training courses.
	This session also provides an opportunity for delegates to raise any queries with the CRIS Trainer, and for the CRIS Trainer to observe delegates whilst they are working before undertaking an informal one-to-one review with each delegate to assess the results of their practical exercise and undertake a more general evaluation of their progress during the overall CRIS Cascade Training Process.
	It should be noted that the sessions **marked with an asterisk*** should <u>ONLY</u> be attending by stakeholders who will be deploying and managing the CRIS solution – i.e. RIS / PACS Managers. All delegates <u>MUST</u> however have attended Part I CORE CRIS Training, and All Delegates will need to attend the final day CRIS Workshop and Delegate Consolidation / Assessment
ACTIONS REQUIRED	All DELEGATES must complete Part I and the final day of Part II – CRIS Workshop and Delegate Consolidation / Assessment, as well as undertake consolidation time between Part I & Part II in order to receive a CRIS training certificate.

ACTION 4: 'CASCADE TRAINER' PLANNING / CONSOLIDATION

OBJECTIVES WEEKS 12 - 13	Following the practical CRIS **'Train the Trainer'** sessions Wellbeing Software envisage each 'Cascade Trainer' will need time to familiarise themselves with each aspect of the CRIS System in context with the objectives of each training course and the Customer's own existing vs new working practices.
	At the minimum this is likely to require at least one (ideally two) weeks of hand-on use of the CRIS 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 End Users.
	Wellbeing Software also recommend that the Customer ensure this period is used to encourage the Radiology Department itself to evaluate the CRIS system and their existing working practice to agree where changes may need to be made in line with the new system

and document future state workflows / standard operating practices (SOP's). This is crucial to enabling Trainers to be fully aware of how the system should be used in context to Departmental / Customer requirements.

Cascade Training should concentrate on the **"Cascade Training Overview and Teaching Script"** in conjunction with CRIS eLearning Modules and CRIS CRIB Sheets which are available via **Wellbeing Academy**. For details of accessing this documentation please e-mail **training@wellbeingsoftware.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 / module throughout the End-User training period. Training room(s) must be correctly configured for training and sufficient numbers of CRIS CRIB sheets must photocopied for distribution during 'End-User' Training Sessions.

| ACTIONS REQUIRED | <u>To complete 'Action 4' each 'Cascade Trainer' should:</u>

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 SESSION OR PREFERABLY ALL SESSIONS – to other 'Cascade Trainers' 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. Clinical CORE – 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 / FUTURE STATE WORKFLOWS WITH THE DEPARTMENT – to assist in localised training delivery 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 (e.g. Are the diaries copied far enough |

into the future to enable Appointment's training?) and confirmed that sufficient CRIS CRIB sheets have been photocopied for distribution to delegates during 'End-User' training or eLearning Modules have been downloaded and made available for use outside of formal training sessions.

ACTION 5: END-USER TRAINING

OBJECTIVES WEEK 14 – 17	Deliver all 'End-User' training to agreed timetable. Wellbeing Software will also deliver VR Cascade Training, and confirm / deliver 1to1 End User VR training if applicable during this time.
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. **PROVIDES FEEDBACK ON DELEGATES WHO MAY REQUIRE ADDITIONAL TRAINING** – Everyone learns in a different way, and it is therefore helpful to make a note of any observations during training, such as members of staff may require additional handholding/ support during the go-live.

ACTION 6: CRIS GO-LIVE

OBJECTIVES WEEK 18	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 Radiologists/Registrars) 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 21	**POST GO-LIVE SYSTEM MANAGEMENT TRAINING – 1.5 DAYS** Wellbeing Software will also undertake full 'Post Go-live System Management' session once it is felt that the 'key users' and RIS 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 CRIS System Management to enable to RIS System Manager(s) to take control of the long-term day-to-day running of the CRIS system. This session often also provides the opportunity for users to raise Adhoc queries relating to system use, or working practice based on their experiences in the period since Go-Live. Please note: Post Go-Live System Management does not include Letters Modification or Creation. However, an additional two day course can be purchased by contacting your service provider or e-mailing training@wellbeingsoftware.com **POST GO-LIVE STATISTICAL REPORTS TRAINING – 1 DAY** During Day Two of the Post Go-Live Training Wellbeing Software will undertake a full day's 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 CRIS Training, or at a minimum have attended a CRIS 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 CRIS Standard Stats Templates which are designed to satisfy national returns concentrating primarily on Diagnostic Waiting Times. 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 error check existing reports built by delegates prior to training, or to build new reports on the spot.
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 RIS / PACS System Managers, Key Department Managers and invites are often extended to IT personnel or data analysts responsible for producing statistical data and monthly returns.

ACTION 8: ADDITIONAL TRAINING ON DEMAND

OBJECTIVES WEEK 18	Post Go-live Training covering Inclusive or Additional Training modules can be scheduled / undertaken on demand post go-live.
ACTION REQUIRED	Customer will need to contact the Wellbeing Software Training Manager to discuss requirements and schedule additional post go-live training. An overview of all available courses can be found in CRIS_CGD290a_All_CRIS_Training_Courses_PC.doc

CASADE TRAINING (TRAIN THE TRAINER) SESSION 'PART I': 2 DAYS (ACTION 3)

COMPLETE SYSTEM OVERVIEW - Comprehensive CORE CRIS Application Training covering all aspects of User-level system functions. 'Cascade Trainers' will then be left to review CRIS Cascade Trainer documentation, course guides and course objectives ahead of Part II of the 'Train the Trainer' session.

CRIS CORE – PART I, DAY ONE TIMETABLE

1000 – 12:30   CRIS SYSTEM WORKFLOW DEMONSTRATION (CRIS TRAINER)

- ACCEPT ORDER OR BOOK ON A GP REQUEST AS RECEIVED

- VETTING REQUESTS (STANDARD VS. FULL VETTING MODULE)

- PUT REQUEST ONTO WAITING LIST or PARTIAL BOOKING LIST)

- CHANGE REQUEST(S) FROM WAITING/PARTIAL TO APPOINTMENT(S)

- ACCEPT ORDER OR BOOK ON AN A&E ATTENDANCE FOR TODAY

- POST PROCESS THE EXAMINATION

- DICTATE A REPORT FOR THE EXAMINATION(S) VIA [REPORT INFO LIST]

- TYPE UP THE REPORT

- VERIFY THE REPORT [VIA BATCH VERIFY]

- PRINT THE REPORT [VIA BATCH PRINT]

12:30 – 13:00   LUNCH

13:00 – 14:30   INTRODUCTION TO CRIS

14:30 – 15:00   BREAK

15:00 – 16:30   VETTING MODULE

16:30 – 17:00   PRACTICAL CONSOLIDATION AND Q & A SESSION

09:00 – 11:00	APPOINTMENTS
11:00 – 11:30	BREAK
11:30 – 13:00	RECEPTION
13:00 – 13:30	LUNCH
13:30 – 14:30	POST PROCESSING
14:30 – 15:00	REPORTING WORKLISTS
15:00 – 15:30	BREAK
15:30 – 16:30	CLINICAL REPORTING
16:30 – 17:00	PRACTICAL CONSOLIDATION AND Q & A SESSION

VR CASCADE TRAINING WITH CRIS REPORTING (OPTIONAL)

3 Days comprising 6 x ½ Day 1to1 - CRIS Reporting with Dragon Voice Recognition training. This training enables up to 6 Delegates who have attended Part I CORE CRIS Cascade Training to go on to deliver 1to1 Reporting Clinician Training ahead of the CRIS system go-live and continue to provide on-going support for existing users and new starters post go-live.

CASCADE TRAINING (TRAIN THE TRAINER SESSION) 'PART II': 2 DAYS (ACTION 3)

DAY THREE / FOUR TIMETABLE - CRIS SYSTEM TRAINING CONFIGURATION & SYSTEM MANAGEMENT

Designed to provide 4 – 6 key delegates from Part I - Cascade Training (i.e. RIS Managers, Clerical Managers, Training Leads) with the knowledge required to deploy the CRIS system, or the ability to configure the CRIS Training System to facilitate End User training sessions.

DAY THREE - TIMETABLE

13:00 – 17:00	**DAY TO DAY HOUSEKEEPING AND SYSTEM STATUSES**
	LIST MANAGEMENT, TOOLS MENU AND PATIENT LINKING, MERGING AND ERROR CORRECTION (120)
	SYSTEM STATUSES DEMONSTRATION AND WORKFLOW DISCUSSION

09:00 – 10:30	**CRIS SYSTEM TABLES**
	STAFF TABLES – Overview of all relevant staff tables including Adding and maintaining CRIS system User and Referrers records.
10:30 – 11:00	BREAK
11:00 – 12:30	**PLACE TABLES -** Overview of all relevant place tables including Linking Referrers, and adding and maintaining Referral Sources, Rooms and Referral Locations.
12:30 – 13:00	LUNCH
13:00 – 14:00	**OTHER TABLES** – Overview of all relevant other tables including:

✓ Appointments System and Diary Set-up and maintenance
✓ General Tables including Examination Codes Table

14:00 – 14:30	BREAK
14:30 – 17:00	**OTHER TABLES (CONT'D)**

✓ Nuclear Medicine Tables
✓ Reports Tables including Coded Phrases and Museum Codes
✓ Post Examination Tables including Post Exam Defaults

DAY FIVE TIMETABLE - INTRODUCTION TO STATISTICAL REPORTS

An introduction to CRIS Statistical Reports aimed at familiarising 4 – 6 key delegates from Part I - Cascade Training with this area of the system ahead of the follow-up Post Go-live Training.

09:00 – 10:00	Overview of how to use the CRIS Statistical Reports Module to amend existing Statistical Report Templates or write your own reports from scratch.
	EXERCISE ONE (3 HOURS): This exercise looks at amending a CRIS System Template to generate Total Activity, Modality Activity, Room Based Activity and Private Patient Activity and demonstrate general statistical reports functionality including amending templates, creating joins between tables, exporting results and saving and scheduling Stats Templates.
10:00 – 10:30	BREAK
10:30 – 12:30	EXERCISE ONE (CONT'D)
12:30 – 13:00	LUNCH

13:00 – 15:00	**EXERCISE TWO (2 HOURS):** This exercise looks at writing a Stat report from scratch to generate the Total Number of (Clinical) Reports for each Reporting Clinician (i.e. Radiologist Reporting) broken down by Modality and Examination. This exercise is specifically designed to reiterate concepts from the first exercise and introduce advanced concepts such as Total Lines and Sub Totalling via the CRIS System.
15:00 – 15:30	BREAK
15:30 – 16:00	PRACTICAL CONSOLIDATION AND Q & A SESSION

DAY SIX TIMETABLE - CRIS WORKSHOP & DELEGATE CONSOLIDATION/ASSESSMENT DAY

The CRIS Workshop and Delegate Consolidation/Assessment day is designed to enable delegates to consolidate their learning by undertaking a practical 1to1 CRIS System Workflow demonstration to the CRIS Trainer.

This session also provides an opportunity for delegates to raise any queries with the CRIS Trainer and for the CRIS Trainer to observe delegates whilst they work before undertaking an informal one-to-one review with each delegate to assess the results of their practical exercise and undertake a more general evaluation of their progress during the overall CRIS Cascade Training Process.

09:00 – 10:30	CRIS CASCADE TRAINING SEMINAR & CONSOLIDATION
	A review of 'CRIS Train the Trainer' documentation including recommended training tools (i.e. Create dummy Patient's and create dummy orders utilities), course guides and course objectives ahead of commencing End User Training.
10:30 – 11:00	BREAK
11:00 – 13:00	CRIS WORKSHOP & PRACTICAL CONSOLIDATION/ASSESSMENT
13:00 – 13:30	LUNCH
13:30 – 15:00	COURSE CONT'D
15:00 – 15:30	BREAK
15:30 – 17:00	COURSE CONT'D

CORE CRIS End User Training Sessions

The following 'CORE Training' sessions are currently available for the CRIS System. These need to be taken into consideration when scheduling the training sessions and can be combined in any way which best suits the various members of staff requiring training.

CORE 'CLINICAL' SESSION	
3 HOURS (INC. 15 MIN BREAK), PART I = 2 HOURS (FOLLOWED BY 15 MIN BREAK), PART II = 45 MINS	
SESSION PREREQUISITES	This session must be completed by ALL CLINICAL USERS (Radiographers/Sonographers/Nuclear Med and in most cases Radiographic Assistants) prior to attending any other advanced CRIS Sessions. THE ONLY EXCEPTIONS to this are Radiographic Assistants' who do not need to complete IR(ME)R details on behalf of radiographers/sonographers and should therefore only attend a 'CORE CLERICAL' session or 'Radiologists/Registrars' who should attend a session specific to their requirements (i.e. CRIS Overview with Vetting, Digital Dictation or Voice Recognition Reporting training).
SESSION OBJECTIVES	Overview of the system, covering CORE system functionality including searching for patients, interpreting patient history/ future events, entering attendances (either directly, or via orders – if applicable), viewing reports, and editing patient/ attendances details as applicable. This session also covers how to complete any required IR(ME)R details following the examination and is designed to give each member of clinical staff a CORE grounding of the system and navigation either ahead of the system go-live itself, or as a prerequisite to any additional sessions which may be required (i.e. Appointments, Reception, Reporting).
CORE 'CLERICAL' SESSION	
2 HOURS	
SESSION PREREQUISITES	This session must be completed by ALL CLERICAL USERS and any Radiographic Assistants (who do not need to complete IR(ME)R details on behalf of radiographers/sonographers) prior to attending any other advanced CRIS Sessions.
SESSION OBJECTIVES	Overview of the system, covering CORE system functionality including searching for patients, interpreting patient history/ future events, entering attendances (either directly, or via orders – if applicable), viewing reports, and editing patient/ attendances details as applicable. 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 (i.e. Appointments, Reception, and Reporting).

VETTING MODULE	
1 HOUR	
SESSION PREREQUISITES:	Anyone attending this course must have first completed the CORE SESSION.
SESSION OBJECTIVES:	The **VETTING MODULE SESSION** is designed to give vetting Radiographers and Sonographers an overview of how to review requests, edit requests and justify these requests before assigning protocols. This session also covers rejecting requests as applicable.
APPOINTMENTS SESSION	
1.5 HOURS	
SESSION PREREQUISITES:	Anyone attending this course must have first completed the CORE SESSION. This session is designed for staff who are responsible for making appointments on a day-to-day basis, <u>NOT</u> for staff who perform these tasks on a more occasional basis as these can be trained in-house post go-live.
SESSION OBJECTIVES:	The **APPOINTMENTS SESSION** is designed to give any members of staff who make appointments on a daily basis an overview of how to place requests/orders on Waiting or Planned Lists, and assign appointments either from waiting lists or directly from new requests/orders. This session also covers automatic and manual assignment of appointments (i.e. Booked Admissions), changing and cancelling appointments etc.
CRIS OVERVIEW AND VETTING MODULE	
1 HOUR	
SESSION PREREQUISITES:	This course is aimed at <u>Radiologists</u> as a precursor to their separate Digital Dictation or Voice Recognition Reporting training. Wellbeing Software recommend the CRIS Overview and Vetting Module training is most beneficial when delivered on a one-to-one or small group basis. <u>Please note:</u> In both cases these sessions should contain a <u>MAXIMUM OF 4 DELEGATES</u>.
SESSION OBJECTIVES:	This session is designed to provide an introduction to the CRIS system, searching for patients, interpreting patient history/future events, reviewing requests, editing requests and justifying requests before assigning protocols. This session also covers rejecting requests as applicable.

CLINICAL REPORTING FOR SECRETARIES	
1 HOUR	
SESSION PREREQUISITES:	Anyone attending this course must have first completed the CORE SESSION.
SESSION OBJECTIVES:	This session is designed to provide an overview of clinical reporting in context to secretaries covering typing up batches of dictated reports, or 'Hot-reporting' in conjunction with a clinician, as well as batch printing reports following authorisation. Please note: If necessary, this session can also be attended by any other clinicians (Radiographer/Sonographers), who type their own reports as required although ideally a separate session for this type of users is recommended.

Optional / Additional Training Sessions

The following 'Optional / Additional Training Sessions' should be scheduled if the appropriate CRIS module has been purchased and will be implemented at Go-live.

CLINICAL REPORTING USING DRAGON VOICE RECOGNITION	
2 HOURS (PER USER - ONE TO ONE SESSION)	
SESSION PREREQUISITES:	This training **WILL NOT** take place during the CORE End User training period, and should be scheduled separately. The duration of this session is typically 2 hours. Wellbeing Software can also provide 'VR Cascade Training' for a max of 2 Key Users / Trainers per day and 'End User VR Training' for a maximum of 3 Reporting Clinicians per day which can be purchased as part of the initial project or e-mailing training@hssnet.com.
SESSION OBJECTIVES:	**REPORTING CLINICIANS SESSION** – Reporting with Dragon Voice Recognition in conjunction with the CRIS system using the Report Info (PACS worklist) and Report Editor. The course aims to introduce the main features of the Dragon Medical 11 when integrated with the CRIS system. These areas include: 1. Creating a User Profile 2. Undertaking General Training

	3. Creating Personalised User Commands 4. Activating CRIS and Dragon Integration 5. Using Dragon with the CRIS Report Editor 6. Using CRIS Commands and Dragon Editing 7. Using the Vocabulary Editor 8. Overview of relevant Dragon Menus This session also includes Authorising / Checking Clinical Reports.

CLINICAL REPORTING FOR SONOGRAPHERS OR RADIOGRAPHERS

1 HOUR

SESSION PREREQUISITES:	Anyone attending this course must have first completed the CORE SESSION.
SESSION OBJECTIVES:	This session should be used to cover Digital Dictation and Typing Clinical reports in context to clinicians (Sonographers/Radiographers) rather than secretaries (i.e. One by one, not in batches). Additionally, if applicable this session can include an overview of reporting via the CRIS Standard Obstetrics Module (If purchased/inclusive).

CLINICAL REPORTING USING DIGITAL DICTATION

1 HOUR

SESSION PREREQUISITES:	In most cases, Wellbeing Software recommend that CRIS Digital Dictation training is most beneficial when delivered on a one-to-one or small group basis or in the clinicians own reporting environment. Please note: In both cases these sessions should contain a MAXIMUM OF 4 DELEGATES.
SESSION OBJECTIVES:	**REPORTING CLINICIANS' SESSION** – Reporting with CRIS Digital Dictation covering use of the Report Info List (PACS worklist) using Digital Dictation, and Authorising / Checking Clinical Reports.

2.5 Days

SESSION PREREQUISITES:	**CORE SYSTEM MANAGEMENT & STATISTICAL REPORTS TRAINING** – Designed to provide 4 – 6 key delegates from Part I - Cascade Training (i.e. RIS Managers, Clerical Managers, Training Leads) with the knowledge required to deploy the CRIS system, or the ability to configure the CRIS Training System to facilitate End User training sessions.
SESSION OBJECTIVES:	**CORE SYSTEM MANAGEMENT TRAINING** Wellbeing Software do not expect the RIS System Manager(s) to immediately take over the day to running of the system. Consequently, the aim of 'CORE System Management Training' is simply to provide appropriate 'key users' and the RIS System Manager(s) with an overview of system and the essential knowledge they require to review and amend tables which are most relevant following the go-live. This is due to the fact that in most cases any changes will be made either in conjunction with Wellbeing Software personnel who will be on-site during the go-live week, or the Wellbeing Software helpdesk who will provide additional support after the on-site hand-holding period. **CORE STATISTICAL REPORTS TRAINING (DAY FIVE OF CASCADE TRAINING)** Overview of the CRIS STATISTICAL REPORTING module – covering CORE use of Statistical Reports Module, running sample reports for reference, and looking at how to schedule reports to run on a regular basis (i.e. Monthly, Quarterly etc.) This session is predominantly aimed at users who need to run simple ADHOC queries, although appropriate 'Key users' or the RIS System Manager(s) should still attend this session where possible. <u>Please note:</u> This session is <u>ONLY</u> designed to provide delegates with the CORE knowledge required to enable them to experiment with Activity based Statistics or ahead of Post Go-Live Stats Training delivered by Wellbeing Software.

2.5 DAYS	
SESSION PREREQUISITES:	**POST GO-LIVE SYSTEM MANAGEMENT TRAINING – 1.5 DAYS** Wellbeing Software will also undertake full 'Post Go-live System Management' session once it is felt that the 'key users' and RIS 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. Anyone attending this session must have undertaken CORE CRIS Training in order to be eligible to join the course. <u>Please note:</u> Post Go-Live System Management does not include Letters Modification or Creation. However, an additional two day course can be purchased by contacting your service provider or e-mailing training@wellbeingsoftware.com **POST GO-LIVE STATISTICAL REPORTS TRAINING – 1 DAY** During Day Two of the Post Go-Live Training Wellbeing Software will undertake a full day's 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 either undertaken CORE CRIS Training or CRIS Overview Session at a minimum in order to be eligible to join the course.
SESSION OBJECTIVES:	**POST GO-LIVE SYSTEM MANAGEMENT TRAINING** – A more in-depth look at CRIS System Management to enable to RIS System Manager(s) to take control of the long-term day-to-day running of the CRIS system. This session often also provides the opportunity for users to raise Adhoc queries relating to system use, or working practice based on their experiences in the period since Go-Live. **POST GO-LIVE STATISTICAL REPORTS TRAINING** – A more in depth look at the CRIS Statistical Reports Module using 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 CRIS Standard Stats Templates which are designed to satisfy national returns concentrating primarily on Diagnostic Waiting Times. This course 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 error check existing reports built by delegates prior to training, or to build new reports on the spot.

NUCLEAR MEDICINE SESSION (IF APPLICABLE)	
1 HOUR	
SESSION PREREQUISITES:	Anyone attending this course must have first completed the CORE SESSION.
SESSION OBJECTIVES:	This session is predominantly designed for providing an overview of the CRIS Nuclear Medicine Module (If purchased) covering entering Isotope details, assigning injections, processing examinations for IR(ME)R purposes and creating departmental contamination records.
	Please note: If this module is not required, or will not be installed at go-live this session is NOT REQUIRED.

How to Schedule CRIS Training

To ensure the success of the CRIS 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 CRIS training as beneficial as possible.

TRAINING SCHEDULING CALCULATOR

To help you achieve this, the following forms are required (Please refer to the enclosed EXCEL spreadsheet **"CRIS 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 session 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 Clerical staff - 8 Clerical CORE sessions are required the Customer may decide to schedule 10 delegates 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*.

KEY ASSUMPTIONS / CONSIDERATIONS

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 CRIS 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. 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 CRIS Training is that all Users MUST possess a basic knowledge of the Windows and be able to use a mouse prior to attending CRIS 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.

TRAINER BREAKS - 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.

CHECKING THAT YOU ARE ON THE RIGHT TRACK - Finally, a draft copy of the Training Timetable including the names of delegates must be sent to CRIS 'Cascade Trainers' at least 2 weeks prior to the start of training. This timetable should use the same format as specified via the 'Example Timetables' in Training_Scheduling_Calculator spreadsheet, and should be forwarded by e-mail to [INSERT CONTACT DETAILS FOR TRUST 'CASCADE TRAINER' HERE] This is to allow the CRIS Trainer(s) to confirm that the training has been scheduled correctly - both to ensure the Customer is able to get the most benefit from CRIS training and to allow sufficient time in which to make changes if this is not the case.

Document Control

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Change History			
Issue	Date	Author / Editor	Details of Change
V1.0	08/07/2019	Emma Savage-Mady	First Issue
V1.1	07/08/2020	Emma Savage-Mady	Review and edits based on 2020 approach
V2.0	31/01/2022	Emma Savage-Mady	2022 Review and updates to include references to the Wellbeing Academy.
Review Date	31/01/2023		