

# CRIS System Training Approach

Wellbeing Software Training Department

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# Introduction

## Purpose

The purpose of this document is to provide an overview of the standard CRIS training approach used in conjunction with new and upgrading customer deployments.

## Audience

This document is intended to be used by prospective and existing customers.

# 1. CRIS System Training Approach

For new CRIS customers Wellbeing Software delivers 'CRIS Cascade Training for New Installations' using a proven CORE CRIS System Training approach which has been employed successfully throughout the UK over more than a decade of Single Trust, Multi/Consortium Trust(s) and Private Sector CRIS system deployments.

Wellbeing Software does however also recognise that the training model for upgrading customer is significantly different to that of new customers and are committed to developing and delivering training courses, and eLearning solutions to maximise efficiency and minimise the level of investment expected from the trust.

## CORE MODULES

Every implementation of CRIS has the following **CORE** modules:

- Vetting
- Document Scanning
- Appointments
- Reception
- Post Examination (IRMER)
- Film Tracking
- Digital Dictation
- Clinical Reporting
- Tables Set-up (System Admin)
- Statistical Reports
- Widgets Bundle
- Launcher *(No Formal Training)*

## INCLUSIVE MODULES

The CRIS system also supplied with the following **INCLUSIVE** modules that each Customer can choose to deploy as required.

- Resource
- Sessions
- Nuclear Medicine
- Obstetric (Standard Forms)
- Portering
- Messaging
- Communicator *(To be deployed via eLearning)*
- IEP Interface *(To be deployed via eLearning)*
- CRIS Insight – Free View *(To be deployed via eLearning)*

## 2. CRIS Training Models – ‘New CRIS Customers’ or ‘Existing CRIS Customers’

Wellbeing Software have established the need for two Standard Training Models – ‘New CRIS Customers’ and ‘Existing CRIS Customers’, which are defined as follows:

### New CRIS Customers

This model applies to Customers who do not currently have the CRIS system and would require comprehensive system training ahead of a new CRIS system deployment.

Following the start of the project the Wellbeing Training Manager will undertake a 'Training Needs Analysis / Consultancy and a CRIS End to End System Overview / Workflow Discussion' with the customer's key stakeholders.

The customer will then be provided with a schedule of all training defined within the project / deployment including activities, actions and key milestones.

### CORE CRIS Cascade Training - Key Users / Train the Trainer

<b>No of Days:</b>	6 Days
<b>Max. No of Delegates:</b>	8
<b>To be scheduled:</b>	Pre RIS Go-live

The Core CRIS Cascade Training Session is designed to prepare delegates who will be responsible for undertaking training or involvement in deploying the CRIS system. The course takes place in two parts over a 2 - 3 week period 8 – 10 weeks prior to Go-Live. Part I covers CORE Modules/Usage and Delegate Consolidation whilst Part II provides an introduction to System Management & Statistical Reports in addition to an end of course Workshop and Assessment Day. The course cannot be changed to run consecutively as the break between weeks is specifically designed to facilitate essential delegate consolidation between Parts I and II.

Please refer to RIS\_PD263\_Cascade\_Training\_Overview.doc for full details and pre-requisites.

### ‘INCLUSIVE’ Modules Training as applicable for New CRIS Customers

<b>No of Days:</b>	1 - 3 Days
<b>Max. No of Delegates:</b>	Varies
<b>To be scheduled:</b>	Pre or Post RIS Go-live (Confirmed during initial CRIS Training Needs Analysis – TNA)

New CRIS customers are also allocated up to 3 Inclusive Training days to enable them to cover the required Inclusive Module Training or Cascade VR Training based on demand and delivered pre go-live (i.e. VR Training) or

post go-live depending on when the customers wishes to deploy these modules. Post go-live training can often prove popular for non-essential modules, or new modules which may require significant business process and working practice changes. It is therefore often more beneficial to train and deploy such modules once the CORE System has been deployed and end users are competent and confident in its usage.

### Post Go-System Management & Statistical Reports Training

**No of Days:** 2.5 Days  
**Max. No of Delegates:** 8  
**To be scheduled:** Post RIS Go-live

The CRIS Post Go-Live System Management session provides a detailed 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 Training is scheduled 2 - 3 weeks post go-live. This approach has proved very successful in giving each Trust the chance to get to grips with the system to ensure that the training is more beneficial when delivered.

Please refer to CRIS\_CGD295\_Post\_GoLive\_SysManandStats.doc for full details and pre-requisites.

Please note: Post Go-Live System Management does not include Letters Modification or Creation, although if this is required it is available as a separate 2-day course detailed via RIS\_CGD315\_Letters\_Training\_Course\_Overview.doc.

### CRIS Reporting Training using Dragon Voice Recognition

CRIS Reporting Training using Dragon VR is delivered via a 'Cascade' Train the Trainer session enabling Customers to implement, support and deliver their own on-going VR training, and can be combined with 1to1 CRIS Reporting End User training according to Customer requirements. This session allows two users per Customer to be trained how to set-up, configure, support and train existing users and new starters on Dragon Voice Recognition.

Although Wellbeing Software can provide 1to1 Consultant Reporting with Dragon VR Training it is not our recommended approach since from experience Customer trainers are always better placed to work around Consultant availability, and in context to Customer working practice. This approach is also unlikely to be the most cost effective solution, as although Wellbeing Software can train up to 3 reporting clinicians per day, the Customer often cannot schedule clinicians in such volumes and cannot fully utilise the time allocated.

Wellbeing Software would therefore recommend that at a minimum each Customer undertake an initial Day of 'VR Cascade TTT Training' ahead of the CRIS go-live to enable two users per Customer to be trained how to set-up, configure, support and train existing users and new starters on Dragon Voice Recognition.

### VR Cascade Training Session – Key Users / Train the Trainer

<b>No of Days:</b>	Up to 3 Days
<b>Max. No of Delegates:</b>	½ Day - 1to1 Training (2 Per day)
<b>To be scheduled:</b>	Pre RIS Go-live

### VR 1to1 End User Training Session – Reporting Clinicians

<b>No of Days:</b>	3 Clinicians per Day – Additional costs apply
<b>Max. No of Delegates:</b>	1to1 Training (3 Per Day)
<b>To be scheduled:</b>	Pre RIS Go-live

### Existing Customers

This model applies to Customers who will be moving from an earlier version of the CRIS system to the latest version of the CRIS system, or will be undertaking a like for like replacement.

Following the start of the project the Wellbeing Training Manager will undertake a 'Training Needs Analysis / Consultancy discussion with the customer and provide with a schedule of all training including activities, actions and key milestones.

The following sessions will typically be required:

### CRIS End to End CORE System Workflow Seminar / Workshop

<b>No of Days:</b>	1 Day
<b>Max. No of Delegates:</b>	12 - 16
<b>To be scheduled:</b>	Pre or Post RIS Go-live

This session provides a comprehensive End to End CRIS System Workflow demonstration which enables delegates to participate in an interactive seminar / workshop that is designed to ensure that all delegates are fully aware of all pertinent CORE CRIS System functionality contained within the version of the software to be deployed at go-live.

Even in the event that the Customer is intending to deploy a 'like for like' CRIS version, or is looking to simply looking to upgrade to the latest version of CRIS – Wellbeing Software have still found that long term, existing CRIS users are not always familiar with all features of their current install, or would welcome the opportunity to further discuss existing functionality in terms of establishing correct usage, or improving workflow.

The target audience for this session is RIS / PACS System Administrators, and Clinical and Clerical Leads from the Radiology Department.



This is a very popular sessions with existing customers either upgrading on their existing deployment or moving to Consortium wide solutions with other trusts. This session is also aimed at customers who often express the feeling that “they don’t know what they don’t know” as it provides the opportunity to assess recommended system workflow against existing local working practice, and facilitates an interactive training needs analysis from which to identify future formal training requirements.

**Please note:** This session can be delivered at each individual Customer, or take a Consortium Wide approach. If a Consortium wide approach is preferred – Wellbeing Software would suggest 2 – 3 representatives per Trust, enabling Training days to be pooled for the appropriate number of sessions (i.e. 2 Days x 12 - 16 Delegates = 24 - 32 representatives).

### CRIS Reporting Training using Dragon Voice Recognition

For sites not already using Dragon Voice Recognition - CRIS Reporting Training using Dragon VR is delivered via a ‘Cascade’ Train the Trainer session enabling Customers to implement, support and deliver their own on-going VR training, and can be combined with 1to1 CRIS Reporting End User training according to Customer requirements. This session allows two users per Customer to be trained how to set-up, configure, support and train existing users and new starters on Dragon Voice Recognition.

Although Wellbeing Software can provide 1to1 Consultant Reporting with Dragon VR Training it is not our recommended approach since from experience Customer trainers are always better placed to work around Consultant availability, and in context to Customer working practice. This approach is also unlikely to be the most cost effective solution, as although Wellbeing Software can train up to 3 reporting clinicians per day, the Customer often cannot schedule clinicians in such volumes and cannot fully utilise the time allocated.

Wellbeing Software would therefore recommend that at a minimum each Customer undertake an initial Day of ‘VR Cascade TTT Training’ ahead of the CRIS go-live to enable two users per Customer to be trained how to set-up, configure, support and train existing users and new starters on Dragon Voice Recognition.

For existing customers who are already using Dragon Voice Recognition Wellbeing Software can provide VR Cascade Training for new key users / cascade trainers and Refresher VR 1to1 End User Training for existing reporting Clinicians who have not previously received formal training. Refresher training is undertaken via a combination of establishing an objectives / issues and spending part of the session going through recommended workflow via the Training System and part of the session observing Live Reporting to assist the Clinician in maximising their use of CRIS Reporting with Dragon VR.

### VR Cascade Training Session – Key Users / Train the Trainer

<b>No of Days:</b>	Up to 3 Days
<b>Max. No of Delegates:</b>	½ Day - 1to1 Training (2 Per day)
<b>To be scheduled:</b>	Post RIS Go-live

### VR 1to1 End User Training Session – New Reporting Clinicians

**No of Days:** 3 Clinicians per Day – Additional costs apply  
**Max. No of Delegates:** 1to1 Training (3 Per Day)  
**To be scheduled:** Post RIS Go-live

#### Refresher VR 1to1 End User Training Session – Existing Reporting Clinicians

**No of Days:** Up to 5 Clinicians per Day – Additional costs apply  
**Max. No of Delegates:** 1to1 Training (5 Per Day)  
**To be scheduled:** Post RIS Go-live

## 3. Training Planning

Wellbeing Software will require each Trust to supply contact details for the Training Lead at project commencement. Following the start of the project the Wellbeing Software Training Manager will contact the Training Lead to provide Provisional Training Dates, and all relevant training documentation in order to schedule the first meeting either by WebEx or Face to Face.

The Training Manager will typically undertake an initial meeting (WebEx or Face to Face, followed by 2 checkpoint conference calls with **New CRIS Customers** these comprise The CRIS trainer will typically also undertake a Training set-up day prior to the commencement of formal training to ensure readiness to proceed and assess local processes.

#### Initial Training Needs Analysis & CRIS System Overview / Workflow Discussion

**Training Consultancy** = The first part of this session enables us to discuss CRIS 'Cascade Training' in terms of the approach Wellbeing Software would recommend the Trust 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 CRIS System Workflow 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 Trust 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. Each Trust will be expected to reserve an appropriate Training room, with the necessary equipment as defined in via RIS\_PD262\_Training Checklist.doc for the duration of all formal training.

## 4. Training Delivery Methods

Unless otherwise stated all Wellbeing CRIS Training is undertaken via a Cascade 'Train the Trainer' classroom approach on-site using a customer hosted training system, training room and associated delegate training PC's + Trainer PC attached to a projector, screen or smart screen. This will enable each Trust to train between 6 - 8 delegates who acquire the necessary knowledge to go on to deliver site specific training both pre and post go-live to all relevant staff. This generally also includes new starters, refresher training and any functionality updates relating to system upgrades.

It is also assumed that unless otherwise advised all training will take place on-site, although for reference Wellbeing Software can also offer Training at a reduced rate at Wellbeing Software' training suite at our head office in Mansfield.

## 5. Additional Training Services, Documentation & Blended Learning

Wellbeing Software are also able to provide additional Cascade Module Training, and bespoke Cascade / End User Training at an additional cost, or by calling off annual training days if applicable to the contract post go-live.

All CRIS training is backed up by comprehensive Training Documentation including Course Overviews, Teaching Guides, Planning Tools, Delegate Workbooks and Course Evaluation Forms (Delegate and Trainer). The CRIS System is also fully supported by CRIS CRIB sheets which provided step-by-step instructions on all functionality.

All Wellbeing Software Training materials are available for download via the CRIS Training Portal <http://cloud.hssnet.com/training/> and access details are available upon demand by e-mailing [training@hssnet.com](mailto:training@hssnet.com).

Most documents are provided in PDF format, however Wellbeing Software are also happy to provide WORD versions of most documents on demand which can then be tailored according to Trust requirements and working practice without infringing copyright.

Wellbeing Software also recognise that Blended Learning is an increasingly popular approach to delivering training when both Trainer and End User resources are limited in terms of availability and time constraints. As a result, Wellbeing Software is committed to developing a suite of eLearning materials which are designed to complement the existing library of training documentation and associated courses for CRIS functionality which is conducive to this medium.

A number of modules are already available for download via the Training Portal as follows, with a continuing programme of development throughout 2018/2019. This provides customers with the opportunity and flexibility of new blended learning solutions which offer cost effective alternatives to more traditional training delivery

methods. eLearning Modules are SCORM 1.2, 2004, TunCanAPI and AICC compliant and when deployed via the customers own LMS solution include scoring and tracking information.

<b>CRIS Basics</b>	An overview covering searching for patients, interpreting history and viewing reports
<b>CRIS Searching &amp; Linking Patient Records</b>	PAS and RIS linking functions within CRIS
<b>CRIS Patient Attendance</b>	Reception module functions relating to attending / arriving patients
<b>CRIS Sessions Clinician Lists</b>	Use of the Sessions Module for Clinicians
<b>CRIS Sessions Meeting Lists</b>	Use of the Sessions Module for MDT purposes
<b>CRIS Messaging</b>	An overview of the CRIS messaging module
<b>CRIS Request a Porter</b>	Use of the Porter Module for requesting porters
<b>CRIS Porter Management</b>	Managing Portering requests and assigning porters
<b>CRIS IEP</b>	Use of IEP functions within CRIS
<b>CRIS Communicator</b>	Use of the CRIS Communicator for e-mailing and acknowledging clinical results and SMS appointment reminders
<b>iCRIS</b>	Use of iCRIS requesting and results functions
<b>CRIS Mobile</b>	Use of the CRIS Mobile solution for Radiographer functions
<b>CRIS IEP</b>	Use of the IEP function via the CRIS System
<b>CRIS Reporting – Standard Workflow</b>	Foundation module detailing the standard usage of the latest web based CRIS Reporting module.
<b>CRIS Reporting – Supervised Reporting</b>	Supervised reporting usage of the latest web based CRIS Reporting module.
<b>CRIS Reporting – Double Reporting</b>	The use of Double reporting via the latest web based CRIS Reporting module.
<b>CRIS Reporting – Peer Review</b>	The use of Peer Review via the latest web based CRIS Reporting system.
<b>CRIS Reporting – Worklist Management</b>	Creating and Assigning CRIS Reporting Worklists and Dashboards via the latest CRIS Admin module.

Wellbeing Software has also commenced developing imbedded Helpfiles for new products being deployed to the market as an on-going evolution of more traditional system documentation and to provide on-line and context specific guidance to users. We also expect to commence the migration of existing CRIB sheets into a next generation Help function commencing in 2020 as part of our commitment to a more paper-lite approach to documentation.

Additionally, Wellbeing Software offer regular free of charge Webinar's / WebEx's covering popular topics and including upgrade familiarisation sessions for major upgrades. Customers can book onto these sessions as required via our new on-line booking portal - <https://bookwhen.com/wellbeingtraining>

## Document Control

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