**TRAINING CHECKLIST**

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**WELCOME!**

Although this checklist has been designed with DHIS2 implementations in mind, the principles should apply to any technical training. This resource has been designed with many lists of questions, reminders, and a link to sample agendas and templates.

**DHIS2 RESOURCES**

**Visit LogicalOutcomes’** [**DHIS2 Resources page**](https://github.com/LogicalOutcomes/dhis2-templates/wiki/DHIS2-Resources)**.** From there you will be able to access all the resources required to learn, setup and use DHIS2 - as well as connect with the community. LogicalOutcomes will maintain this page:

**contact** [**dhis2@logicaloutcomes.net**](mailto:dhis2@logicaloutcomes.net) **with questions and comments.**

# **STEP 1: PLAN TO TRAIN**

1. Form the training team
2. Set up a collaboration folder for training materials (Dropbox, SharePoint, Google Drive)
3. Clearly outline the objectives: who needs to be trained on what, and when?

## **WHO NEEDS TO LEARN WHAT?**

* Who needs to be trained?
* Create a participant contact list
* Have these people been exposed to DHIS2 before?
* **Yes:** lightly cover DHIS2 introduction, login, and glossary
* **No:** include time to introduce DHIS2, explain why it is the platform of choice, provide glossary, session for login support, etc.
* **Both:** consider smaller group work and/or asking the beginners to prepare in advance of the training
* How many people will be involved in this training?
* **1-5:** online or in-person is possible
* **More than 7:** consider smaller groups online, or in-person.
* How many User Roles among this group? What User Roles will the students be assigned?
* Refer back to participant contact list, and add suggested ‘User Role’ for each person. If you aren’t sure, speak with the project System Administrator to learn the Roles that currently exist.

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| --- | --- | --- |
|  | **Tip!**  It is easier to train people who will have the same User Role(s) together. It is more difficult to provide training to a group of people who will be given different User Roles. |  |

## **METHOD OF TRAINING DELIVERY**

* Where are the students (and where is the trainer located)?
* What is the internet connectivity like? Are screen share demos possible?
* Can students prepare for the training by watching videos and reviewing materials in advance?
* Is it important to make an in-person connection?
* Read through the entire checklist before making the decision, it’s an important one.
* Decide: Should the training event be deliveredonline, as self-study, or in-person?

**ONLINE COACHING OPTIONS**

1. Single-session training course/walkthrough (2 hour online sessions are a great way to give individualized or small group coaching to a group of end users)
2. Multiple-session training course (ideal for larger and more difficult tasks and User Roles)

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| --- | --- | --- |
|  | **Tips!**   * Online coaching can be ideal in terms of flexibility and expense. * It is important that everyone has a good internet connection and microphone. * Scheduling can be difficult when everyone is in different countries and/or time zones. * For ongoing courses, much of the learning happens individually, between sessions. * Create work groups and share group work to encourage students not to fall behind on their assignments. |  |

**SELF-STUDY OPTIONS**

1. DHIS Basics: Free [Fundamentals course](https://academy.dhis2.org/courses/HISP/DHIS2_Level1/2015_Q1/about) by University of Oslo[[1]](#footnote-2)
2. DHIS2 Use and Maintenance: DHIS2 [Online Curriculum](https://github.com/LogicalOutcomes/DHIS2-Curriculum/wiki) by LogicalOutcomes
3. Custom curriculum: videos and documentation relevant to the job function

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| --- | --- | --- |
|  | **Tip!**  Self-study is great for driven and self-motivated individuals – however DHIS2 is massively complex and we suggest having some form of instructor or coach to ensure people stay engaged and on-schedule during their learning. |  |

**IN-PERSON WORKSHOP**

1. Cost consideration for in-person travel
2. Offline possibilities: think creatively where internet is lacking; use PowerPoint slide decks and printed manuals

## *\*\*See Sample 1 Week Agenda in Appendix*

## **PLAN TO CREATE MATERIALS FOR EACH TOPIC**

Some projects create User stories to describe the needs of different user groups. Check with the project design team if this activity was undertaken, or were notes on User requirements may be available.

* What skills need to be learned/taught for the selected User Role(s), during this training?
  + In other words, what will their day to day use of DHIS2 include? Start with mandatory functions. Optional/nice to know content may be added later.
* Research time: based on the topics identified, review guidance material to select those best suited to your needs. Visit DHIS2 Resources: see the Training Resources including End User Guide & PowerPoint slides. Search YouTube for videos. Consider making your own video.
* Test the training material: does it meet the training requirements? Take time to customize the training material before sharing with students
* Consider, what else does the student need to learn?
  + Orientation to online tools: Skype, Excel
  + Email, WhatsApp
  + Hardware: laptop, mobile phone
  + DHIS2 prefers Google Chrome browser, although all browsers work.
* How will students demonstrate their learning (an assignment, entering dummy data that is later verified, a follow up call etc.)
* Prepare an Attendance Form

## **SCHEDULE THE TIME AND PLACE**

When should this training take place?

|  |  |
| --- | --- |
| **Stand-alone session**  ../../../Downloads/calendar-flat.png | We define a ‘Stand-alone session’ as lasting anywhere from 2-6 hours. They can be very useful in covering simple tasks and User Roles. It is important not to assign too many topics for a stand-alone session. |
| **Multi-day event**  calendar-01.png | Because of the length of time, there are many ways to design and lead a multi-day training event. They are most useful for teaching complex tasks and/or System Administrator User Roles. The main consideration when planning a multi-day event is the frequency of meetings – whether you are planning multiple days in a single week, or weekly sessions over multiple weeks. When students meet regularly it is much easier to build from one session to another, though larger concepts may take time to sink in. Weekly sessions give students time to process complex ideas, but maintaining continuity between sessions becomes something the instructor will need to be more actively aware of. |

# **STEP 2: PREPARE STUDENTS AND MATERIALS**

* Communicate with students and confirm session date(s)
  + *see Appendix for introductory email template*
* Draft an agenda, finalize & share with students
  + *See Appendix for sample agendas*
  + Include open time for debrief and discussion (at least 30 minutes per half day)
* Book resources: online meeting, room, projector, etc.
* Arrange for trainers to meet in advance of the event to agree on roles and review the agenda. If this is an in-person event, consider holding a practice day to run through presentations and practice timing.
* Send reminder email with agenda, documentation and prerequisites
  + *Ensure the reminder email includes information like:* 
    - *date and time, location*
    - *agenda, objective for the day*
    - *is any pre-work required?*
    - *are students to bring laptop or mobile phone?*
    - *Attachments to review: manual, PowerPoint as appropriate*
    - *Will printed manuals be available?*

|  |  |  |
| --- | --- | --- |
|  | **Tip!**  Assigning homework, or videos to watch, before the first session can increase the quality of the first training sessions, allowing the group to jump in on day one. |  |

# **STEP 3: RUN THE TRAINING**

Be prepared for technical problems. Have back up (hardcopy) options for any presentation or demonstration material.

|  |  |  |
| --- | --- | --- |
|  | **Online Tips!**   1. Have a 1-on-1 communication assessment with each student before your first group session, that will allow you to solve any technical issues ahead of time 2. Use all the time scheduled. DHIS2 is a complicated system, if you end up with extra time, use it to make sure everyone is on the same page, have a student lead a walkthrough, etc. 3. Include a second (back-up) coach. This person can monitor group chat and make notes while the coach focuses on teaching (we call this person a Communication Facilitator) 4. The following things should be treated as warning signs, causing the coach/instructor to intervene and ensure greater engagement / identify the root of the problem    * Student didn’t bring in homework to first group session    * Student has no critical engagement with discussions in first session    * Student doesn’t show up, or is late, to first session |  |

# **STEP 4: GET FEEDBACK AND IMPROVE TEMPLATES**

1. Evaluate the training
2. Incorporate feedback on the system, into the system design
3. Incorporate feedback on the training materials, into the training documentation
4. Retain notes for future training events
5. Save updated materials in the project collaboration folder

# **APPENDICES**

## **SAMPLE: Training Email Invitation**

Dear [PROJECT PARTNERS/STAFF],

It is my pleasure to invite you to a three day DHIS2 testing to be held at the **[LOCATION]**on the **[DATES].**

The objectives are to introduce you to the online monitoring platform customized for [PROJECT], and give you an opportunity to pre-test the tools we’ve set up and to give feedback.

This training and testing event will begin at [TIME], and end at [TIME], starting [DAY, DATE] through [DAY, DATE]. We have scheduled breaks and a lunch hour from [TIME].

Please bring your laptop, and download Google Chrome browser if you do not have it already: <https://www.google.com/chrome/browser/desktop/>

(Please confirm your attendance.)

Thank you,

[NAME]

## **SAMPLE: Online Multi-Day Agenda**

**DHIS2 Curriculum Course Agenda**

Week 1:

1. Introductions
2. Review Data Entry forms and ideal reports from students
3. Homework: Assignments 1-7

Week 2:

* Review previous week's homework, address questions, concerns, etc.
* Homework: Assignments: 8-12

Week 3:

* Review previous week's homework, address questions, concerns, etc.
* Homework: Assignments: 13-17

Week 4:

* Review previous week's homework, address questions, concerns, etc.
* Homework: Assignments 18-27

Week 5:

* Review previous week's homework, address questions, concerns, etc.
* Homework: Assignments 28-34

Week 6:

* Review previous week's homework, address questions, concerns, etc.
* Wrap-up, review

## **SAMPLE: Single Online Session Agenda**

1. Check in with students, how are things going?
2. Share feedback and thoughts from assignments and/or videos
3. Go around the group, collect questions and issues that have come up for each student when going through last week’s assignments
   1. Collect all questions before answering
4. Based on list of everyone's questions, define a rough agenda for answering the questions
   1. Get approval from group
5. Answer questions and issues
6. \*If there is time\* Provide walkthroughs for upcoming assignments
7. Assign next week's homework
8. Go around the group and collect final thoughts, hopes and fears
9. Debrief with Coach and Communication Evaluator
   1. Discuss any warning signs, issues that may need to be escalated
   2. Select a concept or word that can be included/improved into the glossary
   3. Create any issues that need following up and assign an appropriate person
      1. Coach
      2. Communication evaluator
      3. Expert help

## **SAMPLE: In-Person 5 Day DHIS2 Overview**

|  |  |  |  |
| --- | --- | --- | --- |
| Time | Session | Details | Facilitators |
| Day 1 |  |  |  |
| 8:30 – 9:15 am | Welcome | * Welcome remarks * Self-Introduction and expectations * Introduction to the training purpose and learning objectives | All |
| 9:15 -10:30 am | Introduction and Background to DHIS2 | * Talk about the importance of partners data entry input and how they fit the entire process * Provide an overview of the DHIS2 Individual records * Delineate between event and tracker programs * Describe why DHIS2 tracker capture is needed and its potential benefits * Describe differences between DHIS2 tracker and other systems |  |
| 10:30 am -10:50 am | Tea Break |  |  |
| 10:50 – 11:30 am | Review of Project specific tools | * Review and discuss the various project specific tools |  |
| 11:30 am – 11:45 am | Review of UAT issues implementation | * Review of improvements and resolution of issues raised during requirement gathering |  |
| 11:45 am -1:00 pm | System Log-In and Overview | * System Access * System Log-in, overview * Manage Apps * Navigating Around * Password Management |  |
| 1:00 pm – 2:00 pm | Lunch |  |  |
| 2:00 pm – 3:00 pm | Tracker Capture App | * Overview of Tracker Capture App * Q&A |  |
| 3:00 pm – 4:40 pm | Hands-on Application | * Using Tracker Capture to enter project specific data |  |
| 4:40 pm – 5:10 pm | Feedback | * Get Feedback and be able to answer questions * Discuss System |  |
| 5:10 pm – 5:30 pm | Tea Break and closure |  |  |
| Day 2 |  |  |  |
| 8:30 am – 9:00 am | Recap of day 1 |  |  |
| 9:00 am – 9:30 am | Search and Relationship Functionality | * Overview of the Search and relationship functionality |  |
| 9:30 am – 10:30 am | Hands on Practice | * Practice Search and relationship functionality |  |
| 10:30 am -10:50 am | Tea Break |  |  |
| 11:00 am – 12:00 pm | Event Capture App | * Overview of Event Capture App * Difference between Event Capture and Tracker Capture Apps * Q&A |  |
| 12:00 pm – 1:00pm | Hands on Application | * Using Event Capture to enter project specific data |  |
| 1:00 pm – 2:00 pm | Lunch |  |  |
| 2:00 pm – 5:00 pm | Hands- on Application | * Using Event Capture and Tracker Capture Apps to enter project specific data |  |
| 5:00 pm – 5:30 pm | Tea Break and Closure |  |  |
| Day 3 |  |  |  |
| 8:30 am – 9:00 am | Recap of Day 2 |  |  |
| 9:00 am – 9:45 am | Feedback Session | * Provide Feedback on data entry * State Challenges |  |
| 9:45 am – 10:30 am | Messaging in DHIS2 | * Overview and Practice Session on communication in the system |  |
| 10:30 am – 11:00 am | Tea Break |  |  |
| 11:00 am – 1:00 pm | Introduction to Analytics tools | * Overview of Analytics tools * Event Reports * Pivot Tables * Data Visualizer * GIS |  |
| 1:00 pm – 2:00 pm | Lunch |  |  |
| 2:00 pm – 3:30 pm | Event Reports | * Demo of Event Reports |  |
| 3:30 pm – 5:00 pm | Event Reports | * Practice |  |
| 5:00 pm – 5:30 pm | Tea Break and Closure |  |  |
| Day 4 |  |  |  |
| 8:30 am – 9:00 am | Recap of Day 3 |  |  |
| 9:00 am – 10:30 am | Pivot Tables | * Demo Pivot Tables |  |
| 10:30 am -11:00 am | Tea Break |  |  |
| 11:00 am – 1:00 pm | Pivot Tables | * Practice Sessions for Pivot Tables |  |
| 1:00 pm – 2:00 pm | Lunch |  |  |
| 2:00 pm -3:00 pm | Data Visualizer | * Demo Data Visualizer |  |
| 3:00 pm -5:00 pm | Data Visualizer | * Practice Sessions Data Visualizer |  |
| 5:00 pm – 5:30 pm | Tea Break and Closure |  |  |
| Day 5 |  |  |  |
| 8:30 am – 10:30 am | Populating Dashboards | * Demo Adding and Sharing Favourites of reports on Dashboard * Practice Sessions |  |
| 10:30 am - 11:00 am | Tea Break |  |  |
| 11:00 am – 12:00 pm | Other Reports | * Missed Events * Scheduled Events |  |
| 12:00 pm – 1:00 pm | Feedback | * Share feedback and suggestions |  |
| 1:00 pm -2:00 pm | Lunch |  |  |

## 

1. https://academy.dhis2.org/courses/HISP/DHIS2\_Level1/2015\_Q1/about [↑](#footnote-ref-2)