

### **Worksheet for EMR Training request:**

This worksheet is designed to help guide users in outlining the requirements for successful EMR training.

Each item fulfills a recommended approach to maximizing training effectiveness for adult learners.

Date of proposed training:

Name of training:

Name of primary POC:

POC Email:

#### **PROBLEM:**

Clearly state the issue, concern, or problem that requires training. Be specific and frame the question as you would for your potential trainee. Include measurable data on the issue.

#### **PURPOSE:**

What is the goal of the training? What is the desired end-state or what you hope to achieve through the training? Be specific. Describe measurables that will be attained to evaluate the training.

#### **BENEFIT:**

Describe the benefit of the proposed intervention for the patient, for the trainee, and for the organization.

#### **STAKEHOLDERS:**

Determine the stakeholders that may be involved by the proposed change through training. Start with the trainees and consider upstream and downstream effects.

#### **IDENTIFY A PRIMARY STAKEHOLDER:**

Coordinate with a primary stakeholder that will be participating extensively in the process. Training requests without a primary stakeholder will not be considered.

Name:

Department:

Email:

#### **TRAINEE CHARACTERISTICS:**

Evaluate the characteristics of the primary trainees. Determine their current competencies. Describe how you will match the training to their needs based on those characteristics.

**CLINICAL TASK AND FUNCTIONAL ANALYSIS:**

Start with the familiar process and then outline the steps that the trainee must complete to meet the new requirement. Steps outside of those which the trainee must complete are irrelevant to the training and are detrimental to the training process. Overloading trainees with irrelevant information (to them) is the number one cause of ineffective training. List the changing steps and review them with the primary stakeholder.

**WORKFLOW CHANGE ANALYSIS:**

List the impact of the training on the trainees. Consider time, potential for error, and cognitive load. Additionally, list the impact of any changes on the other Stakeholders.

**TRAINING CHARACTERISTICS:**

Determine the best modality for training. Both passive and active can be of value, but active (experiential) learning should be the primary focus to improve compliance, retention, and buy-in. Other considerations may be in-person or virtual, individual or group.

**CONSTRAINTS:**

Determine how much time is needed for the training. Passive in-person training more than 18 minutes is unlikely to be effective without an active training component. Passive on-line training more than 6 minutes is ineffective without an active training component. List time and other constraints of the proposed training.

**RESOURCES:**

List resources that will be required for this training including people, medium, access, etc.

**SUITABILITY:**

Based on the analysis above, the training may be suitable and should enter the design – develop – testing phase.

Primary Trainer:

Primary Stakeholder:

Training Team Representative:

Initial design for training should be to the training team representative no less than 2 weeks prior to the event.