

**TALK New Hire FY2024**

**GOAL 1:** Be capable of managing all aspects for learner check-in for on-site classes.

Due

Date: 04/02/24

Status: Completed

Comment: Having assumed the position following 8 months of working for the [REDACTED] as a Simulation Technologist, [REDACTED] came to the job with experience conducting the class-day check-in process: welcoming learners, having them sign in and verify the information in their database learner records, validating parking, and scanning to a PDF the filled-in sign-in sheet. With that head start, she could immediately learn the tasks entailed in preparing the paperwork, i.e., sign-in sheet, agenda, and individual learner registration forms. [REDACTED] is able to retrieve from the *When I Work* app the names of instructors scheduled to teach a class, obtain from overseeing faculty their assigned roles to input into the database agenda record, export to PDF, and print for dissemination to the learners. She knows how to generate the report to print registration forms and then highlight fields left blank or in need of updating. She can also prepare the sign-in sheet with all registrants in alphabetical order, including some entered manually because they have not yet created a user profile in the database.

**GOAL 2:** Become a competent user of the legacy database, able to create new class, learner, instructor, and organization records; register learners and enroll classes; collect and properly record payment of appropriate course fees or provide for subsequent billing; extract registration reports and forms; import grades from the Moodle testing platform; and, after checking for accuracy, perform post-class tasks of uploading to the AHA or generating certificates of completion.

Due

Date: 04/02/24

Status: Completed

Comment: [REDACTED] has a good grasp of the database functions key to her performing her duties as registrar. She has expressed interest in and will benefit from gaining insight into the [similar] table structure of the databases. Understanding the relationship between Class Registration, Organizations, and Tuition Codes and how they impact Billing may make the correct choices to enter for Orgs and Tuition Codes clearer.

**GOAL 3:** Master the nuances of AHA skills verifications, which are scheduled for individuals by appointment on a dedicated day and consist of learners being evaluated in an in-person component following completion of an online course (in one or more of three disciplines),

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[REDACTED]  
with prepayment of course fees secured before assigning the key for course access and require submission to the AHA by discipline and by the instructor who conducted the skills assessment.

Due

Date: 05/02/24

Status: Completed

Comment: Two days each month are usually earmarked at the [REDACTED] for the in-person component of the blended AHA HeartCode® courses. Currently, appointments are tracked in an Excel file, by 45-minute time slot, noting whether for BLS, ACLS, or PALS, online course key self-purchased or to be assigned from inventory via AHA Training Central, and if/how payment is made. Registrations via the existing public web portal are for date only and received in six different classes in the database, so records are maintained in multiple locations. [REDACTED] has a thorough understanding of the complexities and has become adept at managing the variables for an optimal outcome: appointment times that suit learners' schedules; allotting time slots by discipline, if feasible, for the advantages of group skills checks; and maximizing instructor time by leaving few if any unfilled blocks. The complicated configuration of skills verification classes demands [REDACTED]'s careful attention to detail, up to and including the uploading of records to the AHA so impactful mistakes are avoided.

**GOAL 4:** Be able to maintain accurate, current, and complete digital files for each instructor and SimTech consistent with the database record; generate and disseminate reminder emails of upcoming assignments and deadline for ensuring hours worked are correctly posted in Workday; and run quarterly reports tracking AHA instructor card expiration dates, assess whether renewal criteria have been met, and facilitate required processes for timely renewal.

Due

Date: 04/02/24

Status: Off Track

Comment: The undertaking of this area of responsibility was deferred to allow [REDACTED] more time to get acclimated to the workload and daily deadlines for a packed schedule of classes. She was tasked with sending instructor reminder notices at the end of March, taking over from a terminated co-worker. Attending to instructor credentials in the database (and in a separate Excel master list of instructors) to reflect current certifications by discipline was assigned in May. Still to be learned is the procedure for verifying instructor eligibility for renewal and complying with the AHA requirement to be monitored teaching. Once she can do that, [REDACTED] will be prepared to monitor upcoming renewal dates to ensure instructors meet criteria and are issued new e-cards without any lapse in eligibility to teach.

GOAL 5: Proficiently field email, phone, and in-person inquiries from potential and on-going customers, responding promptly with relevant and accurate information, fulfilling requests for assistance in registering and/or setting a skills evaluation appointment, troubleshooting to resolve reported problems, and, if in doubt, not giving definitive answer until after consulting with supervisors.

Due

Date: 07/02/24

Status: Off Track

Being the point person for PET inquiries is a key obligation of the role of Registrar that necessitates understanding the primary programs offered by the division. This includes knowledge of the AHA disciplines, course offerings, satellite sites, and credentialing of both providers and instructors, as well as familiarity with [REDACTED]-developed continuing education courses, especially those offered for our primary constituent groups during each paramedic certification cycle. [REDACTED] was in this position for 3½ months when it became necessary to route incoming phone calls for emergency training to her phone, due to the termination of a more experienced co-worker. For questions she feels unsure or unable to answer herself, [REDACTED] is encouraged to elicit enough pertinent details to enable more knowledgeable colleagues to readily provide direction. It is also helpful for her to familiarize herself with the resources available to her for needed information, such as stored files on the administrative server and in box.com, useful data look-up websites, and database records of past classes, courses, organizations, and agendas.

GOAL 6: Assist in preparing for an effective and efficient migration of legacy data to the new database by tagging where there are duplicate learner records to be merged, ensuring records of all our per diem instructors and SimTechs accurately and completely reflect the disciplines they are credentialed to teach, with effective dates and expiration dates, and other similar tasks as assigned.

Due

Date: 06/14/24

Status: On Track

Comment: The required vetting and IT approval for the new web registration application is not anticipated to be culminated until mid-June at best, allowing additional time to accomplish further data clean-up. Rectifying errors and shortcomings before legacy data is extracted from the current database obviates the need to make time-consuming corrections during the very limited window when no system is in operation. [REDACTED] has successfully added certifications for all active SimTechs and added dates that were missing for instructors for the disciplines of courses currently on our schedule. The last of instructor credential updating is to address less frequently taught disciplines and delete superfluous certifications from instructor records, aided by having an Excel file containing the results of queries by discipline that captures the duplications. Time permitting, there may be other data clean-up tasks assigned to [REDACTED]

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**GOAL 7:** Progress to being a skilled user of the new fully web-based database that is projected to be implemented fully within the next few weeks as the primary record-keeping system, comprehending how some processes differ from the legacy database and being able to utilize its additional functionality and perform routine class-related tasks efficiently.

Due

Date: 10/02/24

Status: On Track

Comment: With some one-on-one instruction and the freedom to practice typical class recordkeeping functions, such as creating classes, registering learners, enrolling classes, and generating reports, [REDACTED] has achieved a satisfactory comfort level to manage her duties in the new, soon-to-be-launched web-based administrative portal. Further practice up to the actual go-live date should position her to successfully complete her responsibilities within the confines of the real, very tight turn-around time allowances. She will develop expertise through regular use following the transition.

**GOAL 8:** Become familiar with the secured web-based access and inputting of roster, agenda, and evaluation data by [REDACTED] training centers and satellite training sites for classes conducted under the auspices of the [REDACTED] Prehospital and Emergency Training, adept enough to provide customer support as needed.

Due

Date: 10/02/24

Status: Not started

Comment: It was intended for [REDACTED] to learn and be able to process class conducted by satellite training sites and/or ACS/ECG training centers with our current system, if only to provide cross-coverage when needed. This encompasses retrieving the files uploaded to a shared folder in box.com: Excel files with learner information, agendas with the names of instructors by each presentation, and learner evaluation summary reports; vetting for accuracy and converting to a CSV file to upload to the database; and inputting instructor names into the database agenda; and then uploading to the AHA for e-cards or generating wallet cards and certificates. This was deferred to the point it became impractical to invest the time to learn a process that will in a few weeks be obsolete. The new database and public portal app facilitate authorized users logging in and entering data into on-screen web forms that are encrypted and saved directly to the database, and if done correctly, ACS/ECG training centers can output their learners' course completion documents. Training for the new process will enable [REDACTED] to provide customer support to satellite sites and TCs that might encounter difficulties or need guidance.

Topic: Strength: Service Standards/DIRECCT Values

One of [REDACTED]'s primary responsibilities is assisting learners, and whether in person or on the phone, she is pleasant and respectful. Her caring manner and empathy come through, as does her eagerness to help. She is open to and welcoming of opportunities to learn, willing to take initiative, and is eager to share ideas for attacking an issue differently or trying a different way for a better outcome.

Topic: Development Opportunities: Service Standards/DIRECT

Following are three areas where [REDACTED] can take steps that should help mitigate errors and aid her in meeting deadlines:

- Organization – to better stay on top of assigned and shared obligations and determine the status at a glance, consider:
  - Utilizing subject-oriented checklists and/or tracking sheets
  - Selecting from a variety of online courses available via ULearn/LinkedIn Learning and complete one or more to discover tips, methodologies, and techniques others have found beneficial
- Prioritization – assigned tasks have varying deadlines; take on and fully complete the most pressing obligations first to allow sufficient time and still complete on schedule
  - Strive for prompt responses to inquiries and requests, even if just to acknowledge and fulfill within a reasonable amount of time, unless urgent.
  - Ask for clarification from supervisor when there appear to be competing priorities.
  - Consider checking from the vast menu of online course options on this topic.
- Take time to review and check own work before finalizing
  - Lean on detailed checklists for reminders to avoid omissions
  - Refer to written communication describing the assignment
  - Make use of built-in Microsoft Office tools, such as Editor, Spelling & Grammar, Thesaurus.

Overall Assessment of Performance and Behaviors - Manager Evaluation

Rating: Meets some expectations

Comment:

In five months with the [REDACTED] Prehospital and Emergency Training as Program Coordinator, [REDACTED] is acclimating to her role as registrar, fulfilling an administrative function that requires multi-tasking amid fast-paced operations. Now familiar with the regular day-to-day functions, she can concentrate on finding systems and tools that fit her style to help her become more confident, productive, and efficient. She is intent on doing her job well. We look forward to her gaining a greater understanding of the mission and operations of the division and the center at large. This will give her the opportunity to develop new skills, attain greater knowledge and experience individual and professional growth.