**Clinical Training Specialization Training Plan**

**Training Description:** This is a Microsoft Excel training that has been tailored to meet the needs of clinical employees that need to work with data to ascertain information regarding which individuals are assigned to them, what those individuals’ acuity levels are, and when those individuals need to be contacted.

**Materials Needed:**

* Advertisement email
* Signup Genius link
* PowerPoint
* Video
* Clinical Specialization Excel Workbook
* Evaluation

**Setup Tasks:**

* Create Signup Genius Link.
* Send the advertisement email.
* Send calendar invitations to individuals that sign up.
* Email PowerPoint to individuals.
* Prepare PowerPoint, video, and Clinical Specialization Excel Workbook.

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| **Phase** | **Activities** |
| 1 - Introduction | * Introduce the training goals * Explain that there are two different ways the users may access Excel (the browser and desktop) * List the differences between the versions * List some benefits of each version * Verify that everyone has received the sample spreadsheet and can locate it. * Demonstrate how to switch from working in a spreadsheet in the browser version to working on the same spreadsheet in the desktop version. |
| 2 – Reviewing Prior Knowledge | * Review the following interface elements in Worksheet Tab 1:   + AutoSave   + Manual Save   + Redo & Undo (CTRL + Z & CTRL + Y)   + Ribbon   + Tabs & Groups   + Name box   + Formula bar   + Columns   + Rows   + Worksheet Tabs   + Slider bar   + Zoom Settings |
| 3 – Setting the Stage for New knowledge | * Play video on switching between the trainer’s screen and the participant’s screen and then transition to Worksheet Tab 2 – Practicing Excel Skills |
| 4 – Explain & Demonstrate Excel Skills | * Explain the concept of an Excel range * Set up the spreadsheet   + Change the data format in Column A from general to number   + Change the format of Column H to number   + Align data to the top and left * Sort data by Care Manager * Sort data by Care Manager and Next AAA Assessment Due Date * Filter by Care Manager * Filter by Care Manager and sort by Next AAA Assessment Due Date * Filter by Care Manager and then by Acuity Level * Apply conditional formatting to detect duplicates in the Medicaid Number column. * Apply conditional formatting using Text That Contains in the Member Last Name column. * Apply conditional formatting using A Date Occurring next month in the Next AAA Assessment Due column. * Filter by color |
| 5 – Excel Skills Application | * Offer the following challenges to participants   + Pretend you are Frank Fisher. How many members do you have? When was Janice Hill’s last assessment?   + Pretend you are Grace Green. Highlight all of your assessments that occurred in February.   + Pretend you are Mia Morgan. You have two upcoming assessments due on the same day. Which day, and which city are they in? |
| 6 – More Excel Skills Application | * Transform the range into a table * Demonstrate how to filter data in a table * Demonstrate how to sort data in a table * Explain the concept of a formula * Utilize the edate formula to predict a future date * Utilize the Workdate function |
| 7 – Bonus Content (time depending) | * Apply Text-to-Columns to a column * Find & Replace * Go to Special |
| 8 – Closing | * Thank participants * Allow participants to voice any frustrations or questions they’ve had * Inform participants that they will receive a short evaluation in their email and that all responses will be anonymous. |

**Training Plan with selected annotated instructions**

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| **Phase:** | **Topic / Activity:** | **Instructions:** |
| 1 - Introduction | Open with the PowerPoint Presentation | * Introduce the training goals * Explain the difference between the browser version and desktop versions of Excel * List the benefits of each version * Demonstrate how to switch from the browser version to the desktop version |
| 2 – Reviewing Prior Knowledge | Transition to the desktop version of Excel, Clinical Specialization workbook, Tab 1. | Review the following interface elements:   * AutoSave * Manual Save * Redo & Undo (CTRL + Z & CTRL + Y) * Ribbon * Tabs & Groups * Name box * Formula bar * Columns * Rows * Worksheet Tabs * Slider bar * Zoom Settings |
| 3 – Setting the Stage for new knowledge | Play video on switching between the trainer’s screen and the participant’s screen |  |
| 4 – Explain & Demonstrate Excel Skills | Transition to the desktop version of Excel, Clinical Specialization workbook, Tab 2. | * Explain the concept of a range in Excel - A range is two or more cells in a workbook; they do not have to be adjacent. |
| 4 – Explain & Demonstrate Excel Skills |  | * Set up the spreadsheet   + Change the data format in Column A from general to number – right click Column A, choose format Cells and then choose Number. In the decimal place box, change to zero. Click OK.   + Change the format of Column H to number – Click on cell H2 and drag down to Cell H31. Click the yellow triangle with an exclamation point and choose convert to number.   + Align data to the top and left – Click on the triangle in the top right corner and then click on the Home Tab, alignment group, and choose top align and align left. |
| 4 – Explaining & Demonstrate Excel Skills |  | * Sort data by Care Manager – Click on the triangle to highlight all data. Then click on the Data tab, Sort & Filter Group. Click Sort, verify the My Data has Headers box is checked, and choose “Care Manager” and click OK. |
| 4 – Explain & Demonstrate Excel Skills |  | * Sort data by Care Manager and Next AAA Assessment Due date - Click on the triangle to highlight all data. Then click on the Data tab, Sort & Filter Group. Click Sort, verify the My Data has Headers box is checked, and choose “Care Manager.” Next click on and choose Next AAA Assessment Date and click OK. |
| 4 – Explain & Demonstrate Excel Skills |  | * Add filters to the spreadsheet – Click on the number 1 for Row 1 and then click on the Data tab, Sort & Filter group. Click on Filter. |
| 4 – Explain & Demonstrate Excel Skills |  | * Filter by Care Manager - Click on the downward point triangle on Column I and uncheck Select All. Click on Grace Green and click Okay. |
| 4 – Explain & Demonstrate Excel Skills |  | * Filter by Care Manager and sort by Next AAA Assessment Due date - Click on the downward point triangle on Column I and uncheck Select All. Click on Grace Green and click Okay. * Click on the downward point triangle next to Next AAA Assessment date and then choose sort newest to oldest. |
| 4 – Explain & Demonstrate Excel Skills |  | * Filter by Care Manager and then by Acuity Level * Click on the downward point triangle next to Next to Current Acuity Level and then choose sort A to Z. |
| 4 – Explain & Demonstrate Excel Skills |  | * Unfilter all columns. |
| 4 – Explain & Demonstrate Excel Skills |  | * Apply conditional formatting to detect duplicates in the Medicaid Number column – Click on the letter “A” above the Medicaid Number column. Click the Home Tab, Styles group, and choose Conditional Formatting. Hover over Highlight Cells rules and click on Duplicate Values. Row 4 and 10 should be duplicates. |
| 4 – Explain & Demonstrate Excel Skills |  | * Remove the Conditional Formatting - Click on Conditional Formatting, hover over “clear rules” and then click on “clear rules from Entire Sheet.” |
| 4 – Explain & Demonstrate Excel Skills |  | * Apply conditional formatting using Text That Contains in the Member Last Name column – Click on the letter “D” above the Member last name column. Click the Home Tab, Styles group, and choose Conditional Formatting. Hover over Highlight Cells rules and click on Text That Contains and type “Romero” and click OK. |
| 4 – Explain & Demonstrate Excel Skills |  | * Remove the Conditional Formatting - Click on Conditional Formatting, hover over “clear rules” and then click on “clear rules from Entire Sheet.” |
| 4 – Explain & Demonstrate Excel Skills |  | * Apply conditional formatting using A Date Occurring next month in the Next AAA Assessment Due column – Click on the letter “M” above the Next AAA Assessment Date column. Click the Home Tab, Styles group, and choose Conditional Formatting. Hover over Highlight Cells rules and click on “A Date Occurring” and choose Next Month. Click OK. |
| 4 – Explain & Demonstrate Excel Skills |  | * Filter by Color – Click on the downward point triangle next to Next to Next AAA Assessment Date and choose filter by color and then chose pink. |
| 4 – Excel Skills Application |  | * Participant Challenge - Pretend you are Frank Fisher. How many members do you have? When was Janice Hill’s last assessment? |
| 4 – Excel Skills Application |  | * Participant Challenge - Pretend you are Grace Green. Highlight all of your assessments that occurred in February. |
| 4 – Excel Skills Application |  | * Participant Challenge - Pretend you are Mia Morgan. You have two upcoming assessments due on the same day. Which day, and which city are they in? |
| 5 – More Excel Skills Application | Transition to the desktop version of Excel, Clinical Specialization workbook, Tab 3 “More Practice” | * Explain that often data will come to you in a table. A table has a few benefits over a range, such as being able to more quickly sort and filter data. |
|  |  | * Transform the range into a table – Click in cell A1. Click on the Home tab, styles group, and click on Format as Table. Click on a style and then click OK. |
|  |  | * Demonstrate how to filter data in a table – In Column I, Care Manager column, click on the downward pointing arrow, uncheck Select All, and then click the checkbox next to Frank Fisher. |
|  |  | * Unfilter the care manager column – click on the filter and then choose “Clear Filter from Care Manager.” |
|  |  | * Demonstrate how to sort data in a table - In Column I, Care Manager column, click on the downward point arrow and choose “Sort A to Z.” |
|  | Transition to the desktop version of Excel, Clinical Specialization workbook, Tab 4 “Formulas are fun!” |  |
|  |  | * Explain the concept of a formula – A formula is a way to programmatically manipulate the data in a spreadsheet. |
|  |  | * Utilize the edate formula to predict a future date – Type the following formula in M2 =edate(K2,3) to automatically create a date 3 months from K2. Click on Cell M2 and pull the green box straight down to row 31. |
|  |  | * Utilize the workday function to predict a future date (allows you to exclude weekends and holidays) – Click on cell O2. Then click the Formulas tab. Click on Date & Time Functions, and then choose Workday. * For start date type K2 * For days type 120 * Leave holidays blank. – to Exclude a holiday, you must have a column of dates to exclude. |
| 6 – Bonus Content (time depending) | Transition to the desktop version of Excel, Clinical Specialization workbook, Tab 5 “Bonus Content.” | * Apply Text-to-columns to a column – Click on Column A “Care Manager” to highlight the column. Click on the Data Tab, Data Tools Group, and then click on Text to Columns. * Choose delimited, and click next * Uncheck Tab and then check space and click next * Click finish |
| 6 – Bonus Content (time depending |  | * Find & Replace – Press CTRL + H or Click on the Home Tab, Editing Group and click on Find & Select. |
| 6 – Bonus Content (time depending |  | * Go To Special - Click on the Home Tab, Editing Group and click on Go To Special – Choose blanks. |
| 7 - Closing |  | * Thank participants for attending the training * Allow participants to voice any frustrations or questions they’ve had. * Inform participants that they will receive a short evaluation in their email and that all responses will be anonymous. |