

IT Training Manual

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IT Training

Introduction

Princess Alexandra Hospital NHS Trust consisting of approximately 3,000 staff, believe that staff development and learning should be an integral part of the organisation's strategic planning, so that staff can perform their individual jobs effectively and, in doing so, ensure that the organisation achieves its objectives.

Aims

The main aims are to:

- Provide a working environment where continuous learning and development take place.
- To ensure that staff are supported and enabled to meet the changing demands of the organisation.
- To ensure that the organisation achieves its strategic objectives.
- To facilitate staff development through assisting staff to broaden, deepen and thereby further enhance their existing skill base.

To achieve these aims, learning and development needs will be regularly reviewed by Line Managers conducting PRDP's (Personal Review Development Plans).

Identifying and Assessing IT Training Needs

There are a number of ways that IT Training needs are identified, these can be as follows:

- **Organisational** – Affects a particular function or department as a result of changing work methods, procedures or practices and/or supports the overall strategy of the organisation.
- **Promotion** – As a result of an increase in responsibilities within the organisational.
- **Developmental** – Provides the staff member with additional skills that can be applied at present or increase the individual's potential for further growth.

Equal Opportunities

The organisation is committed to ensuring equality of learning opportunity hence no employee will be excluded from learning on the grounds of gender, age, marital status, disability, racial grounds or religious beliefs.

Roles and Responsibilities

IT Training Manager

The IT Training Manager is responsible for planning, co-ordinating, delivering and evaluating the IT training service in line with the strategic requirements of the Trust.

In addition to supporting the development and implementation of IT systems that deliver improved organisational performance and effectiveness.

The manager will evaluate the effectiveness of any training activity carried out by their staff, including the review of completed evaluation forms as necessary.

IT Trainers

The IT Trainer will be responsible for delivering and supporting the full range of IM&T training from Microsoft computer skills through to full end user training for an assortment of software solutions including COSMIC.

Specific information regarding training & supporting doctors, including locums, can be found in the section of Training Approach/ Locum Doctors and/or Doctors

There are a number of tasks and responsibilities that support the delivery of the above courses and include:

- Trainer development:
 - Ensure TTT completed as part of preparation for delivery of any of the above mentioned modules
 - Acquire relevant qualification, if appropriate
 - Attend special interest groups/ user groups/ team meetings
- Materials development:
 - Software changes
 - Localisation for specific process
 - New scheduled courses
 - New materials, eg. Exercises
- Course preparation
 - Course scheduling
 - Confirmation email of attendance
 - Printing of materials for class
 - Room set up, including 'care' of training room pcs
 - Certificates for delegates
- Course delivery:
 - Scheduled/Planned Classes
 - 1-1 in clinic
 - Bespoke 1-1 requests
- Course Evaluation:
 - Creating and filing responses
 - Feedback any areas for improvement to the IT Training Manager

The Trust

It is the responsibility of the Trust to ensure that all colleagues:

- Agrees to the policy that states, no training, no access to clinical systems will be granted
- Communicate to the IT Training Manager, in advance, the training needs associated with new and existing colleagues
- Book the training, in advance, of training required, for all existing and new staff joining the hospital
- Plan resources appropriately, so that staff may be released to attend scheduled training

Training Methodology

For those classes listed within this catalogue, the training delivery will be a combination of classroom, 1-1 support in the workplace and for some class of staff, eLearning will be made available.

For additional training requirements, identified through an Organisational change, the IT Training Manager will, in conjunction with the Project lead and the Trust, consider the most appropriate methods of training delivery, for Trust staff, in the timescales set.

Training Approach

Depending on the role that you undertake in the hospital, will identify the approach the IT Training Team will take in the delivery of training.

Most class of staff will need to attend classroom mandatory training, if they require access to COSMIC.

There are some instances, listed below, where alternative approaches will be taken.

Doctors

The process and type of training provided to a doctor will be dependent upon the grade of the doctor applying for access to COSMIC.

Consultants & Registrars (Clinics/Outpatients only):

For those doctors that will be working in an Outpatient setting only, 1-1 support/training will be provided by the IT Training Team.

For the above to be successful, the following must take place:

- The doctor must arrive to clinic half an hour before the clinic is due to start
- The trainer will provide an overview of the system, on a 1-1 basis, at the doctors computer
- The doctor must be prepared for the trainer to sit in on the clinic to provide additional support, if required
- The trainer will notify the IT Department and access to COSMIC will be granted

Consultants and Registrars (both Inpatient and Outpatients):

For doctors that by definition, will carry out work in both the inpatient and clinical (outpatient) setting, they must attend the mandatory COSMIC Consultant classroom training.

For more information regarding the course objectives, please go to the course catalogue/ COSMIC training/ Session 3 Consultant

FY1 & FY2:

This grade of doctor will need to attend a shortened version of the mandatory COSMIC Consultant classroom training.

This will concentrate on Inpatient **ONLY** and will take approximately 2 hours in total.

Locum Doctors

All Locum Doctors and Consultants must complete an e-learning module if they are working in an Inpatient Ward or the Emergency Department.

There two e-learning modules;

- ED Clinician
- Inpatient Doctor

The e-learning modules consist of software simulation, demonstration and user interaction. There is also a short test at the end that the user has to complete.

Upon completion of the course and success of passing the test, the user will be prompted to enter their name and email address. This detail is fed back to a centralised database and will be used to validate that the Locum pack was given out after the user has completed their mandatory training.

Locum packs should only be offered to a Locum clinician for a maximum two week period. Their Line Manager is responsible for making a request to IT for a user account. At the point that the Locum makes a request for a permanent account, the IT Training Team will be able to identify whether the individual has taken part in training and therefore the offer for a short re-fresher will be offered however is not mandatory. Completion of the e-learning and use of the system for a two week period will grant the user access without attending formal training.

Service Managers are responsible for pre-arranging a trainer to attend clinic for a Locum consultant/Registrar who will see patients within a Clinic/Outpatient area.

Where Locum accounts are provided to Locums without evidence of attendance of the e-learning session, IT Service Desk will notify IT Training Team. These users will then be escalated to the appropriate Service Lead and Associate Director.

NB

The IT Training Manager requires at least 2 working days for all training requests, to enable resource to be planned appropriately, while continuing to deliver scheduled classes.

If the above is not adhered to, there is a risk that training for locums, may not be available, thereby access to COSMIC is denied, which will negatively impact the running of the hospital.

IT Training Course Catalogue

Basic IT Skills

Course Code: 292BIS

Duration: 2 hours (1 session)

Course Objectives: The course is designed to provide delegates with the basic computer knowledge and skills required to be able to use a computer competently.

Course Outline:

Session 1	(2 hours)
<ul style="list-style-type: none">• Understanding the main parts of a computer• Mouse handling (Left click, right click, double left click, click and drag)• Desktop• Icons and shortcuts• The keyboard (layout and typing)• Minimise/maximise, moving, re-sizing and closing windows• Using the taskbar• Understanding the Start menu• PC security• Storage• Files and folders	

File Management

Course Code: 29FIL

Duration: 2.5 hours (1 session)

Course Objectives: The course is designed to give delegates the confidence to build an organised and structured filing system on their computer and to be able to retrieve their work efficiently. Also providing an understanding of the user interface and file management features of Windows by using the Windows operating system to manage files and folders and basic software applications.

Course Outline:

Session 1	(2.5 hours)
<ul style="list-style-type: none">• PC Security• Computer terminology – hardware/software• Understanding Files and Folders (creating/deleting/renaming)• Windows Operating System (system properties)• Memory and storage• Creating shortcuts• Viewing different Drives• Using the Control Panel• Customising the Desktop• Using Task Manager	

Internet

Course Code: 29INT

Duration: 2 hours (1 session)

Course Objectives: The course teaches delegates how to use the internet productively and safely within the workplace.

Course Outline:

Session 1	(2 hours)
<ul style="list-style-type: none">• Understanding the background of the Internet• Recognising the structure of Internet Addresses (URL's)• Using search engines to find information• Performing simple searches using a variety of search engines• Changing Internet settings• Using Favourites• Creating a folder in Favourites• Looking/clearing the browsing History• Saving/printing a web page	

Microsoft Excel

Course Code: 29EXC

Duration: 9 hours (3 sessions)

Course Objectives: The course is designed to teach delegates the fundamental concepts of spread sheets, understanding and being able to accomplish basic operations associated with developing, formatting and using a spread sheet.

Delegates should be able to show an understanding in standard mathematical and logical operations using basic formulae and functions, incorporating more advanced features such as creating charts.

Course Outline:

Session 1	(3 hours)
<ul style="list-style-type: none">• Introduction to Excel• Creating and editing worksheets• Moving around a worksheet• Saving, opening and closing workbooks• Entering text, number and dates• Formatting data• Copying, moving and erasing cells• Using find and replace• Freezing panes	
Session 2	(3 hours)
<ul style="list-style-type: none">• Understanding basic calculations• Distinguish between different formulae• Creating formulae and functions• Correcting error messages• Using Relative and Absolute cell references	
Session 3	(3 hours)
<ul style="list-style-type: none">• Headers and footers• Creating charts• Print set up functionality• Printing	

Microsoft Word

Course Code: 292WOR

Duration: 9 hours (3 sessions)

Course Objectives: The course teaches delegates the ability to use word processing to be able to accomplish basic operations associated with creating, formatting and finishing a word processing document ready for distribution.

Delegates should be able to demonstrate competence in using some of the more advanced features associated with word processing applications such as creating standard tables, inserting pictures and images within a document and using mail merge tools.

Course Outline:

Session 1	(3 hours)
<ul style="list-style-type: none">• Introduction to Word• Creating a new document• Saving, opening and closing documents• Inserting, selecting and editing text• Formatting text and paragraphs• Proof reading documents• Printing documents	
Session 2	(3 hours)
<ul style="list-style-type: none">• Heading styles• Headers and footers• Tabs• Finding and replacing text• Cut, copy and pasting text• Page Set Up• Setting page breaks	
Session 3	(3 hours)
<ul style="list-style-type: none">• Using clipart• Inserting tables• Mail Merge• Borders and shading	

Microsoft Outlook

Course Code: 290OUT

Duration: 5 hours (2 sessions)

Course Objectives: The course teaches delegates how to use email effectively. Delegates should be able to compose, send and receive emails as well as attach files to messages. Delegates will also discover how to manage emails using folders as well as using an address book.

Course Outline:

Session 1	(2.5 hours)
<ul style="list-style-type: none">• Opening and closing emails• Creating and sending emails• Reading, replying to and forwarding messages• Opening and saving attachments• Sending attachments• Moving and copying text• Sorting, finding and flagging messages	

- Using the address book and managing contacts
- Creating a distribution list

Session 1	(2.5 hours)
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- Managing Calendars
- Scheduling Calendar items
- Working with Tasks
- Tracking Tasks
- Organising Folders
- Managing Rules

Microsoft PowerPoint

Course Code: 29POW

Duration: 9 hours (3 sessions)

Course Objectives: The course is designed to provide delegates with the knowledge to use PowerPoint to produce professional, eye-catching presentations. The delegate should be able to create a PowerPoint presentation that would include performing tasks such as creating, modifying and formatting slides using a variety of slide layouts, as well as effectively using graphs and charts. Additionally the delegate should feel comfortable being able to apply effects to the individual components of a slide and the slides themselves.

Course Outline:

Session 1	(3 hours)
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- Creating a PowerPoint presentation
- Creating a new presentation
- Creating, formatting and organising slides
- Adding and editing text
- Using text boxes and WordArt
- Using pictures, ClipArt and SmartArt
- Inserting Media Clips

Session 2	(3 hours)
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- Inserting charts
- Inserting tables
- Using animation
- Using slide transitions
- Using Slide Master
- Adding presenter notes
- Protecting a presentation
- Using document properties
- Shapes
- Printing presentation items

Session 3	(3hours)
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- Sharing a presentation
- Saving in other formats
- Customising a slide show
- Using presentation tools
- Rehearsing a presentation
- Recording a presentation

Microsoft Word Expert

Course Code: 29POW

Duration: 9 hours (3 sessions)

Course Objectives: The course teaches delegates the ability to use Word Processing to be able to accomplish advanced operations associated with creating, formatting and finishing a word processing document ready for distribution.

Delegates should be able to demonstrate competence in using some of the more advanced features associated with word processing applications such as creating standard tables, inserting pictures and images within a document and using mail merge tools.

Course Outline:

Session 1	(3 hours)
<ul style="list-style-type: none">• Word Options• Managing templates• Restricting document access• Formatting with styles• Using Quick Styles and Quick Parts• Working with tables and formulas• Working with charts• Linking text boxes	
Session 2	(3 hours)
<ul style="list-style-type: none">• Setting tracking options• Comparing/combining• Inserting citations• Working with captions• Listing and managing sources• Bibliography• Cross referencing• Creating indexes• Updating and editing	
Session 3	(3 hours)
<ul style="list-style-type: none">• Merging with Outlook• Merging to envelopes and labels• Setting merge rules• Creating online forms• Locking forms• Filling forms• Recording, running and editing Macros• Buttons	

Microsoft Excel Expert

Course Code: 29POW

Duration: 9 hours (3 sessions)

Course Objectives: The course is designed to teach delegates advanced functions or spread sheets, understanding and being able to accomplish more defined filters, formulas and visual techniques. Delegates should be able to show an understanding in standard mathematical and logical operations using basic formulae and functions.

Course Outline:

Session 1	(3 hours)
<ul style="list-style-type: none">• Customising charts• Using Sparklines and Trendlines• Using dynamic charts• Working with templates• Using XML• Workgroup functions• Inserting functions• Using statistical and financial functions	
Session 2	(3 hours)
<ul style="list-style-type: none">• Using logical functions• Using text functions• Advanced functions• Auditing worksheets	
Session 3	(3hours)
<ul style="list-style-type: none">• What-if Analysis• Using data tables• Working with scenarios• Using array formulas• Using Pivot Tables• Using Macros• Adding form controls• Data validation• Using Pick Lists• Setting Excel options	

COSMIC Training

General Course Objectives: The course is designed to provide delegates with the knowledge to navigate round the system which is specific to the role they undertake within the hospital. For more information, please look at the individual course descriptions below:

Course Outline:

Complex Booker	(2x3 hours)
<ul style="list-style-type: none">• Registering a patient• Editing a patient card• Creating referrals• Planning and managing TCI's and pre assessment appointments• Rejected offers and pausing the RTT Clock• Suspending patients• Deceased patients• Closing referrals• Medical records	
Consultant/Nurse Specialist	3 hours
<ul style="list-style-type: none">• Editing a patient card• Add allergies• Out coming a patient• Admission overview• Discharge ED Letter & Inpatient Discharge Summary• Clinical documentation• ED overview	
Inpatient Doctor/Junior Doctor	2.5 hours
<ul style="list-style-type: none">• Editing a patient card• Add allergies• Admission overview• Discharge ED Letter & Inpatient Discharge Summary• Clinical documentation• ED overview	
ED Clinical	2.5 hours
<ul style="list-style-type: none">• Editing a patient card• Viewing, assessing, accepting/rejecting a referral• Managing planned activities• Visit and procedure registration and out coming a patient• Admission overview• Discharge ED Letter & Inpatient Discharge Summary• ED overview• Clinical documentation	

ED Reception**2.5 hours**

- Register a patient
- Creating referrals
- View clinics and schedule
- View inpatient
- View ED
- ED module

IP Nurse and Ward Clerk**2.5 hours**

- Editing a patient card
- Record inpatient activity
- Admission, discharge and transfer
- Ward/Patient overview
- Clinical documentation

Midwife**3 hours**

- Registering a patient
- Editing a patient card
- Record inpatient activity
- Admission, discharge and transfer
- Ward/Patient overview
- Clinical documentation
- Resource planning and scheduling
- Maternity module
- Clinical documentation

Community Midwife**3 hours**

- Registering a patient
- View a referral
- Resource planning and scheduling
- Clinic attendance management
- View clinical documentation
- Registering a patient
- Resource planning and scheduling
- Maternity module
- Clinical documentation

OP Receptionist**3.5 hours**

- View a referral
- Resource planning and scheduling
- Clinic attendance management
- View clinical documentation
- DNA'ing patients
- Cashing up clinics

OP Nurse	2 hours
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- Editing a patient card
- Viewing referrals
- Clinic and schedule overview
- Clinical documentation

PCC OP	3.5 hours
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- Registering a patient
- Editing a patient card
- Referral Management (Creating/ closing/accepting)
- Scheduling and planned activities
- Filters and review lists
- Clinic lists
- Medical record

Pharmacy	2 hours
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- View referral inbox screen
- View resource planning and scheduling
- View inpatients
- View patient
- View medical documentation
- Discharge summary

View Only	2 hours
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- Patient search/Bed management
- Patient overview
- Dynamic overview
- Admission overview
- Medical records
- ED Overview
- View resource planning and scheduling
- Visit procedure registration (optional)
- Continued care planning (optional)

Bespoke	Ave. 2 hours
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A bespoke 1-1 session that is tailored to the requirements of the delegates line manager

IT Training Requests Workflow Procedures

Receiving IT Training Requests

- All requests for training should be made via endusertraining@pah.nhs.uk
- Staff should be explicit in the date required, type of training required and ensure their Line Manager has approved their attendance
- Once the request has been received either via email or telephone, the training administrator will check the availability of the course requested and confirm within 72 hours of initial request
- Training requirements for the use of clinical applications such as COSMIC will be identified within the IT New User form.
- Requests for IT Training must be appropriate to the role of the staff member or volunteer.
- All requests for Microsoft Training must receive authorisation of individual Line Managers.
- Individual staff may be interested in obtaining accreditation or a nationally recognised qualification. PAH will be sympathetic to requests of this sort, where the learning has a noticeable relevance to PAH objectives, and in co-operation with the staff member will seek to provide appropriate support and assistance.

Delegate Course Booking

- All IT training classes will be scheduled on the IT Training Team Database
- If the class and date is already scheduled, within the training database, this will be confirmed both verbally, if on a call and with a follow up email
- If there is not a class available on the date specified, the training administrator, will, after checking with the IT Training Manager, schedule a further class and confirm with a follow up email
- The training administrator will update the IT Training database with the attendee's name, update ESR with the details of the course.
- The training administrator will allocate a trainer for all scheduled courses in the IT Training database and send a meeting invite to the trainer, with the details of the course.

Scheduling Additional Courses

- Additional classes will be scheduled based on demand and/or through the instruction from the IT Training Manager
- The training administrator will check trainer availability and room availability before creating additional classes in the IT Training Database
- Once trainer and room has been confirmed, the training administrator will book/block this out for the training to be scheduled
- If there are people waiting for classes to become available, the training administrator will email confirmation, as per above process

Delegate Non Attendance

- The trainer will allow for a maximum of 15 minutes for delegates to show up for class
- If a delegate fails to attend a scheduled training course, the trainer will first try and make contact with the individual to confirm attendance
- If the delegate is available to attend, the trainer should make every effort to carry out the scheduled class
- If the delegate is unable to attend, due to unforeseen operational issues, the delegate will be asked to email endusertraining@pah.nhs.uk to arrange an alternative date
- The Trainer will not mark the class roster as attended and as such, will be classed as DNA

Trainer Administration

- Before the training session, the trainer should check the training database and print off the roster, which will detail the delegates due to attend all courses for that day
- The trainer needs to prepare the classroom with the appropriate number of materials required dependant on the number of attendees due
- Ensure the training room is prepared and ready for the delegates to arrive
- Once training has been delivered, ensure the delegates complete the paper evaluation sheets and collate them in
- Trainer will then update the training database with attendees

Additional Information

General Information

IT Training Office

The IT Training Office is on the ground Floor in Grane House, PAH. If you have any queries or problems, please contact a member of the IT Training team via:

- Telephone: 01279 444455 (ext. 1029)
- Email: endusertraining@pah.nhs.uk

Hours of Business

The IT Training Office is open from 09:00am to 17:00pm Monday to Friday.

Course Times

Course times vary dependant on the application. Generally half day courses run from 9am–12pm or 1:30pm–4:30pm. Full day courses normally run from 9am-4pm.

Evacuation Procedure

If the training room you are in needs to be evacuated, the assembly points for the training rooms are:

Parndon Hall IT Training Room – The car park in front of the building

Kalmar House Training Room – Outside the front of the Eye Unit

Grane House IT Suite – Outside the front of the Eye Unit

Refreshments

Delegates can purchase tea/coffee from the machine located in Kalmar House (next door to Grain House) or from the canteen/Costa, within the hospital.

Course Information

Bookings

All course bookings should only be made once an application form is received from the staff member which has the line manager's signature on the form.

The IT Training team will respond, via email, to course booking requests, within 72 hours of receipt of the request.

Arrival

Please arrive 10 minutes prior to the start time, this will ensure you have sufficient time to take your place, get a drink and for the course to commence promptly. Any delegate who arrives 15 or more minutes late to a course may be prevented from attending.

Course Cancellations

Staff Cancellations:

If for any reason you are unable to attend, please inform the IT Training Team. Where possible, new date(s) will be provided.

IT Training Team cancellations:

Courses can be cancelled due to circumstances beyond the control of the team or trainer.

These will normally be due to equipment/network failure, resource issues such as staff illness, venue failure or urgent course material change requirements.

In the event of the above happening, all delegates will be contacted ASAP.

Course Pre-requisites

For some courses, especially at intermediate or expert levels, we require delegates to have some prior knowledge of the application that can be gained through experience or attendance on other IT training courses.

Where course pre-requisites are specified in the course outlines, it is the responsibility of the delegate to ensure they have the suitable skills prior to attending the course.

Courseware

All delegates receive a 'quick reference guide' for the training course they attend. They are also informed that training manuals for various applications are on the Intranet, due to the size of these manuals, we do not provide these to delegates. However, all delegates receive a link to download any course files and a PDF copy of the training manual. This is to ensure that the costs are kept low while providing high quality courseware.

Room Bookings

General:

We have 3 IT Training Rooms; they are in Parndon Hall, Kalmar House and Grane House. They are equipped with Smart Boards, 8 PC's in each training room, internet access and a printer.

Availability

To check availability following the following link on Public Folders:

1. Parndon Hall IT Suite and Grane House IT Suite, please email endusertraining@pah.nhs.uk
2. Kalmar House availabilities have to go through Tracy Hart on ext. 7632

Room Security

The IT Training Rooms can only be access by the IT Training staff, Training staff and Medical Education Team.

To gain access to the Parndon Hall IT Training Room, please see a member of the Medical Education Team in the office to the right of the training room.

Please ensure that you advise the admin team when you leave the room so it may be securely locked. Failure to do this may result in you not being able to book rooms in the future.