ClinConnect

Partnering for Clinical Placements

TRAINER GUIDE

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NSW GOVERNMENT | Health

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Contents

Section 1: For the trainer

Introduction

Preparation and rehearsal are key to successful training delivery. Please read the materials thoroughly and allow sufficient time to practice before your first session.

How to use this document

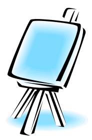
Everyone approaches the task of training documentation in different ways, largely driven by how we were initially taught to create session plans and then by adapting those approaches to suit the training we found ourselves delivering. In creating this trainers guide, we have attempted to be as useful as possible. Once you are familiar with the structure of the training and the guide, we invite you to highlight, annotate, attach flags and sticky notes throughout to suit your style and audience.

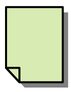
This document includes:

- background information about the training, the structure and design
- checklists – to help you prepare for the day
- sessions plans for each module
- comprehensive appendices – including copies of learner materials, slides and support contacts

Symbols used

Throughout the session plans, symbols have been used to allow easy scanning as you deliver the training. These are:

	**Trainer led** You are speaking to the group, and or leading a discussion
	**Flipchart** You are writing key points on a whiteboard or flip chart or referring to a pre-prepared flip chart.
	**Demonstration** You are doing something on the computer
	**ClinConnect display** You are pointing things out on the display
 Slide **nn+**	**Slide nn** Usually a PowerPoint Slide, nn will be the slide number + indicates there is a 'build' on the slide

	**Task** Participants are using their computers, usually to practice what they have learned
	**Group** Group activity or discussion
	**Workbook or User Guide** Using workbook for activity or information or the user guide for reference
	**Handout**
	**Link** Suggestions for what to say to provide a bridge for learners between modules. Usually occurs at the end of each module or between sub-sections. Links let participants know where they are on the learning path
Do this, talk about **this**	**Text colours** Used in the session plans to aid scanning. **Actions** are in orange e.g. **show**, **say** or ask a **Q**uestion. Green highlights the **key** word(s) related to the **topic**.

About the training

The training is to support the implementation of the ClinConnect Clinical Placements management system. Introducing any new system involves change and training is a tool we use to help people navigate change successfully.

The training assumes learners are proficient with computers, MS windows software and at least one of the approved browsers. The training also assumes the learners have some experience with placements in their organisation.

Objectives

At the end of this training, participants will be able to:

- Describe the role of ClinConnect in their work
- Logon to ClinConnect
- Use ClinConnect Search to find required records
- Use ClinConnect to perform at least 3 of the key tasks associated with their role
- Describe 2 sources of help or support for ClinConnect

There are also learning aims for some modules.

For some participants, the processes around ClinConnect are new ways of working and explanations for these business rules are included in the training. A copy of the business rules will be available at

Outline

These timings are a guide. You must end the day on time so adjust the timings to suit your audience and flow so that all content can be covered. Breaks can be varied to suit learner pace and local catering needs.

Timing	Module	Comments
	Welcome and Introduction	
	Orientation • Business • System	Introduces the business guidelines and well as the system. Includes a learning check where Learners have first hands on of ClinConnect
	Morning tea	
	Demonstration following the placement cycle includes Learning check	At each event window there is a guided step through the screen followed by a learner practise Recap Event windows Review profile information Request Placements Approve Placements Accept Placements
	Lunch	
	Manage Window – Student	creating students, verifying and assigning students,
	Manage Window – exceptions, cancellations	changing student assignments, creating placements by exception Each activity includes separate practise
	Break	
	Reports	Covers two types – profile information and placement reporting
	Review and Wrap	Final Q&A, implementation considerations

Training database

A training database has been created that provides placements at various stages in the ClinConnect Timeline. To do this, discipline specific cycles were used. When using the database for activities or general exploration, the type of placement you need determines which discipline to use.

To access placements at this stage:	Use one of these disciplines	Use this cycle
Event type		
Review Profile Information (Health)	• Podiatry • Speech Pathology	1 January 2013 - 30 June 2013
Request (Education – Haven University)	• Dental & Oral Health • Social Work • Pharmacy	1 January 2013 - 30 June 2013
Approve (Health)	• Psychology • Occupational Therapy • Dietetics	1 January 2013 - 30 June 2013
Accept (Education – Haven University)	• Nursing and Midwifery • Physiotherapy	1 January 2013 - 30 June 2013
Manage Window	• Nursing and Midwifery • Physiotherapy • Occupational Therapy	13 May 2013 – 31 December 2013

We have invented two imaginary towns for our training data – Oasis and Haven. They have been populated with hospitals, education providers and students.

	Oasis LHD	Haven LHD
Health Services, Facilities and Disciplines	Oasis General Hospital DE, DR, DIET, ME, NM, NME, OT, PH, PHYS, PSY, RT, SW, SP	Haven Base Hospital DE, DR, DIET, ME, NME, OT, PH, PHYS, POD, PSY, RT, SW, SP
	Oasis Memorial Hospital DE, DR, DIET, NME, OT, PH, PHYS, POD, PSY, SW, SP	Haven District Hospital DE, DR, DIET, ME, NME, OT, PH, PHYS, PSY, RT, SW, SP
Education Providers	Oasis University	Haven University TAFE NSW Haven Institute
Students		Nursing and Midwifery (104), Occupational Therapy (92), Physiotherapy (105)

Getting ready for training

Preparation for You

Successful training requires good preparation. Many people find training others to be a daunting task, preparation is key to overcoming any nerves. Here are some suggestions to help you prepare that will also build confidence:

- Be familiar with the materials – **walk through the modules** several times. We suggest speaking out loud as material can sound very different and may not flow as well out loud as it does in your head.
- Use the system, **practice the activities** you will be asking learners to do, look for places where they might stumble.
- **Anticipate questions** so that answers come more easily.
- **Call the venue** contact a few days before the training. Confirm the name and number of any ‘go-to’ people on the day should there be problems with equipment, access to the room or materials.
- Review and **update the checklists**, add contact information for all support people e.g. the local IT person.
- On the day, **allow plenty of time** so that you are set up well in advance of learner’s arrival. That way you can get to know them, put them at ease and begin to build rapport.

Preparation for Learners

As a trainer, one of our goals is to minimise or remove anything that might get in the way of learning transfer. This includes learner resistance, lack of belief in the trainer, outside worries or distractions. Here are some tips to welcome and relax your trainees:

- Set the scene in **pre-training communications** – ensure the tone is friendly and includes a link to information about ClinConnect.
- On the day – ensure the environment is **welcoming** – clean, safe, well lit and with space for their personal belongings.
- **Greet** each person as they arrive, introduce them to others.
- In the session – **check** for their **expectations** so you can meet or handle these.
- Explain how **questions** will be handled as this removes any doubt that questions are welcome.

Checklists

These checklists have been provided to assist with set up. Please update these to suit your local setting.

In the lead up

- ☐ check all user logins work and change passwords if required (first login requires this)
- ☐ Email participants – see sample in Appendices
- ☐ Make a list of key contacts,
- ☐ Files – Hard and soft (virus-checked) copies of slides, login spreadsheets, handouts
- ☐ Add your introduction to Session plan
- ☐ Venue – call and introduce self
- ☐ Venue – confirm equipment, access to photocopier if needed
- ☐ Venue – access on the day
- ☐ Venue – arrange Health, Safety and Emergency briefing, include this information in the session plan
- ☐ Venue – morning/afternoon tea arrangements, lunch facilities
- ☐

On the day

- ☐ Markers, eraser
- ☐ Trainers equipment logged on an working, files accessible
- ☐ All learner computers logged on
- ☐ Projection – projector working, lighting and blinds adjusted
- ☐ Log-ins and passwords available for computer time-outs
- ☐ Water and glasses paper towels
- ☐ Clear pathways of trips, rubbish removed
- ☐ Learners guides / handouts
- ☐ Writing equipment for learners
- ☐ Post it notes
- ☐

End of day

- ☐ Feedback gathered
- ☐ Systems logged off
- ☐ Rubbish removed, room tidied
- ☐ Equipment, keys returned
- ☐
- ☐ White board cleaned
- ☐ Thank venue contact(s) in person or by phone
- ☐ Complete debrief sheet
- ☐

Post training

- ☐ Post feedback forms to training coordinator
- ☐ Debrief with nominated mentor
- ☐

Section 2: Session Plan(s)

Module 1 – Welcome and Introduction

When	What	Who	Refer to
	Add your own introduction to the first section, insert your name on slide 1 The first module sets the tone for the day and influences how much learners will participate, ask questions and listen. Consider how you prefer to handle questions. The Car Park method is included in the appendices The icebreaker provided has been designed to illicit information about learners that may help you to place the learning in their context throughout the day. You are free to modify or substitute an alternative icebreaker provided it fits within the suggested time Module Aims: • Provide security/framework for learners through establishment of 'rules' (i.e. when to ask questions, housekeeping) and structure – of the day i.e. agenda, start and finish • Create motivation for learning – energy, personal aspects • Remove blocks to learning • deal with any admin e.g. feedback and registration forms		
	Welcome Introduce yourself, thank them for coming. **About their trainer** including experience and a personal wish for what they will take away from/experience today e.g. learning something new, feel comfortable with this new way of working	T1 or T2	Slide **01**

Housekeeping

Slide **02**

- Maximise learning by **removing distractions** e.g. phones, pagers. Distracting to fellow learners not just you
- Start and finish **times**, breaks
- Fire alarms and exits
- Any **hazards** in the room, trips other H&S requirements
- **Bathrooms** – access cards if needed
- How **questions** will be handled – car park using post-its on wall or flip chart
- Explain **learner guide** – some materials we'll use today and a set of step by step guides collected in a user manual. Suggest making notes to help when back at work
- **Implementation page** – this is to record ideas, questions, people to contact – anything at all related to getting started with ClinConnect at your health service or education facility.

Questions, personal learning objectives

This opportunity for learners to have their concerns heard helps uncover and remove some resistance to training. You may introduce it by saying something like

Q: We have a plan for the day, also have some flexibility....

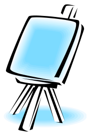
We want to ensure we meet your needs and answer your questions where possible so

what questions do you have?

what would you like to get from today?

Note answers on flip chart; refer to individual items where they are covered during the day. You will also check it at the end of the day to highlight what has been covered and explain how remaining items can/will be addressed.

	Outline of the day It will be a blend of discussion, demonstration and practise. **Show** Agenda Highlight those items from their list and where they will be covered. **Training database** As close as possible to life but may be a few small inconsistencies, please remember **focus** is on the **process**, not the data in the training database Can't **break** it Other learners accessing **simultaneously** Will be **refreshed** each night		Slide **03**
	Objectives/Learning outcomes At the end of this training, you should be able to: • Describe the role of ClinConnect in the work you do • Logon to ClinConnect • Use ClinConnect Search to find required records • Use ClinConnect to perform at least 3 of the key tasks associated with your role • Describe 2 sources of help or support **Q:** Anything we've missed? opportunity to capture learner needs or questions for the day – whiteboard/flipchart these		Slide **04**
	Feedback Important contribution to improvement Last page of workbook Will be collected at end of day		

	Icebreaker : Aim is to energise the room, give learners an opportunity to speak and be heard, create connection between learners, gain insights into where learners are, if there is any resistance and key questions. Use the icebreaker in Appendices or use your own. Important to calculate the time it may take – max is 30mins including debrief or processing time. • **introduce** icebreaker • give **instruct**ions including timings • check for **questions** **debrief** as per selected ice-breaker instructions		Slide **05** 
	Say something like We have lots of things in common/to cover/questions to answer so Let's get started!		

Module 2 – Orientations – Business and operational

When	What	Who	Refer to
	Nursing and Midwifery participants will be familiar with some of the concepts and business rules of ClinConnect but others will not. The introduction of ClinConnect may require adjustments to the way they work. It is important that adequate time is allowed for participants to understand these business or operational ways of working as this will make the ClinConnect system easier to understand and adopt. This module consists of instructor lead sessions and a walk through of some key navigation features of the system. It is done via slides so that the prompts are easily accessed for the trainer. It also means that the trainer can focus on continuing to build rapport rather than navigating ClinConnect in this early part of the training. Learners should be encouraged to note things that will help them remember in their Learner guides		
	Introduction Orientation to the way it works both inside and alongside the application, we'll • learn about the **reasons** behind ClinConnect and the **benefits** it brings • learn about the general business **context** • have a look at the structure of ClinConnect, key terms and **concepts** • learn how to use the main feature for finding information – the **Search** • generic to all users and so we will look at ClinConnect across the different activities. In later modules, we'll go through the tasks that are specific to your role		slide **06**

	About ClinConnect **Q:** What Is ClinConnect? **Show** slide		Slide **07**
	How did we get here? the Why and System objectives **Show** slides, highlight key data		Slide **8, 9**
	Key concepts –How Windows opening and closing Specific activities that can happen only during certain windows Will receive 'notification' to the email address that is your logon as each window opens Another way of looking is to see windows and roles together		Slide **10,** Slide **11**
	Key concepts – Profiles, capacity Capacity – consider how many students could you take/place and when. Profiles exist for 'about' type information and provide a 'profile' of the facility, education provider, unit **SPA** Student Placement Agreement (from website): This Agreement is designed to govern the arrangements and processes required for university and non-secondary school VET student clinical placements in NSW Health facilities		Slide **12, 13**

	Who Different roles, ‘drive’ ClinConnect during different windows Levels of access will vary depending on responsibility– refer to table in Learner Guide for definitions		
	Timelines and Windows – the When These 4 windows are the Event Type windows. Review/Request/Approve/Accept. Beyond these we move into the ‘Manage’ Window where student related events happen along with changes, deletions and creation of placements by exception which occur during the ‘manage’ placements window Q: **Questions so far?**		Slide **14** Slide **15** Slide **16** blank
	The ClinConnect Timeline This is the holistic view of windows and events this is a build slide summarises windows, events and sets in context of clinical placement cycle aim is to provide bridge between their language and ClinConnect language step through builds, pausing periodically to check for questions go slowly and if necessary, repeat the build		Slide **17** builds

Module 3 – Orientations continued - ClinConnect

When	What	Who	Refer to
	This system orientation is for familiarisation only so that when learners come to do the first exploration, they feel confident to 'have a go'. This orientation together with the exploration practise means that learners will be able to focus on the business concepts as they use ClinConnect rather than navigating and screen elements Aims to find and view a profile to manipulate placement searches using • cascade boxes • select/deselect • date picker to manipulate the search results using • paginator • expand and collapse • expand search criteria view •		

	Using ClinConnect - the system orientation		
	Say something like – I'll go through what it looks like from the perspective of each window now, and then you'll have some time to explore, first though, we need to logon		Slide **18**
	Logging on		
	Explain application portal, will grow over time removes the requirement to log on to each new application		Slide **19+** build
	Explain select discipline and cycle, remind of earlier concept of 'roles'		Slide **20**
	Explain entry screen, the **Dashboard** pointing out features		Slide **21**
	Step through menu structure, this gives learner a sense of the system and how it is structured. Over the day, they will build expertise about where to find things		Slide **22 and 23**

Finding information - Introduction

NB not looking at data, focus is on interactions within the screen.

Say something like:

> Images on page n of learner guide, feel free to annotate

Explain

2 types of search and results displays – **profile** information and **placement** information

1. Profile searches

slide has criteria and results

Show –Reviewing and updating profile information is the first step in the Review Profiles window

example of Unit Profile

More detail later, focus is on **searching**

Slide **24+**

build

Slide **25**

2. Placement searches

Show Search screen and highlight key features as indicated on slide

- Select all
- Clear All
- Check boxes, multi select
- Cascading criteria – can change categories in each column
- Only options selected in previous column determine what is available in next column. Options not selected are forgone.
- More criteria
- Date picker – date picker will have important role when we come to doing placements later

Slide **26, 27**

	Search results • Views - Day/week/month, Tabular • option to refine criteria • paginator • expand collapse • next screen • hyperlink to Unit Profile		Slide **28**
	Profiles and Hovers **Say** something like All base information about something is stored in its profile and these are viewable from specific menus and also via pop-ups Other pop-us are available for placement information where needed		Slide **29**

Learning Check – Explore!

Say something like:

> Now it's your turn. Let's see what we've covered so far on the actual system

- Log on or re-enter passwords
- use a discipline or NAM, OT or Physio
- Explore menus
- View screens, find 3 types of profiles, explore the tabs – be thorough
- Search
- Look at hovers

Allow 10-15 mins

Debrief Exploration - Q: Any questions? Process these.

Conclude by **saying** something like:

> Did you notice the detail possible in the profile information, e.g. contacts and the ability to include attachments like maps, orientation information, learning objectives?
>
> For everyone to benefit, important to keep this up to date – could be a first step in preparing for Go Live

Slide **30**

Wrap

So far, we've been looking at the facilities available across the system:

- Logging on and the entry screen
- Searching for information such as profiles, placements
- Profiles and pop-ups

and we've played with all the navigation tools on the search displays

Blank

Slide **31**

	Link **Say** something like : Now time for a break and when we come back to look at the ClinConnect Timeline and the tasks within it. **Restart** at hh:mm		

Break 30mins, **Announce** restart time **Explain** morning tea arrangements	Slide **32**

Module 4 – Stepping through the (booking) Event Windows

When	What	Who	Refer to
	This module reinforces the higher level view and provides the framework for learners to organise mentally their understanding of the system. It is important not to get into every possible scenario, what you want learners to understand is how the system flows/hangs together and the key information for each screen within an Event window. This will help them 'find their way' when they later use the system. There is a practise option for each window and these should be used to suit audience i.e. Health Service or Education Provider. This module builds on the orientation in Module 2 Slides are provided but this section can be demonstrated using the training database For Each window, there is a Quick Reference Guide in the Learner Guide Aims • Deepen understanding of timelines and all related concepts • Clarify who does what and when • Ensure importance of the role of profile, in particular the unit profile and capacity is clear • Provide optional practise points at each of the 4 windows		

	Introduce module Refer back to the ClinConnect Timelines, we are focusing on the first part – the Event Windows recap concept of event windows **Say** something like We're going to step through the main screens used through each event windows. This will give a stronger sense of how the ClinConnect processes placements through the ClinConnect cycle. Key screens are in your **Learner Guide**	T1 or T2	Slide **33** Slide **34**

Event type 1 – Review and update capacity (Manage Profile Data)

A Health Service task, this is how capacity gets entered into the system

Slide **35**

Point out

- Unit details are unique to each discipline
- Contact information
- key placement information- beds/clinicians/chairs, streams, type of supervision offered
- different **tab** views at bottom of screen
- **capacity** is displayed under either Shift Capacity or Clinicians tab
- **attachments to profile are possible e.g. map, orientation information**

Practise

You are a ______________________

The Review Profile window closes next week and you have been asked on behalf of the Unit to update the Unit Profile so that the Unit accepts all student categories, has a capacity to take 10 students for the 'Day' shift and update the Contact Person to be yourself.

Find your way to the Unit Profile and edit it as requested

Once you have made the above changes, go back to the main menu, find the same Unit and check the changes have been saved.

Check for questions

Summarise – Ensuring profile data is accurate is a vital foundation step in the ClinConnect Timeline

	Placement search – in depth **Say** something like Before we go on to work with placements, it's timely to look at how the placement searches we make influence the results we get and our work with placements Recap Selection boxes, check boxes, select all, deselect all **Dates** If 'Full Time M→F' **checked**, • search results will be displayed as a default Monday to Friday, regardless of search date entered. • search results will not display available part weeks. If 'Full Time M→F' is not checked, • search results will show all availability, including part weeks and full weeks. • Days available are displayed in the hover information		Slide **36** Slide **37, 38**
	Results display **Recap**: Views / Paginator / Expand +Collapse- / Page forward / Hyperlink to profile information **Suggested** placements are the lines shaded in grey **Hover** Other things to note: Tabular view > **Column Picker** to manage display columns		Slide **39** Slide **40** Slide **41**

Event type 2 – View, edit and make requests

Slide **42**

Explain / Point out

- Can change quantity ‘in-line’ to the maximum capacity
- Request more than one at a time
- Tally – selected/submitted
- Available quantity – can only select up to this amount

Edit

to edit, select one of the suggested placements grey box by checking it > from button at bottom of screen, click Edit.

Slide **43**

These are the allowable edits

- Modify date range by typing over date or clicking on calendar
- Modify the number of students (and/or chairs) that you’d like to request by choosing a number in the ‘Capacity’ drop down
- Request a part time fixed placement by clicking on the ‘part time’ radio button and selecting the days of the week for the placement
- Request a part time flexible placement by clicking on ‘flexible’, selecting the days of the week, then clicking ‘flexible days’ and entering the number of days per week required for the placement
- Request a placement with a flexible date range by clicking on ‘flexible’, selecting ‘flexible dates’ and entering the total number of placement days required over the specified date range
- Modify one or more placement properties by choosing another option in the drop down list. Only properties available for that particular Unit/Clinician will be available for selection. If the Unit/Clinician has a primary and a secondary stream, you will be able to change the requested stream.
- Add one or more attachments by clicking ‘browse’ to find the file and then clicking on ‘Add’

	Practise: Requests Copies are in the Learners Guide Suggest each learner work through the scenarios alone of in pairs. If time is short, divide the room into 3 and allocate a scenario per group **Debrief** check for questions, highlight where learners were able to correct own errors		Slide **44**
	Visual Cues **Explain** • As we move through the events, ClinConnect becomes more colourful • Each colour indicates a different placement status • Asterisk indicates an item has been modified		Slide **45**

Event type 3 – Approve or ‘not approve’ requests

Slide **46**

Some of the considerations of health services at this step might include:

- What are the priorities for future workforce, where will they come from?
- Who are my preferred partners

Point out

- minimum of ‘Full Edit’ access to approve requests.
- only finds requests where there is a SPA.
- select placement by checking box beside it
- change quantity approved ‘in-line’ ie by changing the number displayed
- buttons available – Edit, Approve, Not Approve
- access profile information via its hyperlink

Say: Note – anything that hasn’t been ‘Approved’ when the window closes will automatically be set to ‘Not Approved

Edit

Slide **47**

- Some information read only, added when placement established
- Can partial approve by reducing the quantity – placement is marked with an Asterisk
- Note colours
  Green – approved
  Purple – not yet approved
  Yellow – Not Approved

	Practise: Approves Copies are in the Learners Guide Suggest each learner work through the scenarios alone of in pairs. If time is short, divide the room into 4 and allocate a scenario per group **Debrief** check for questions, highlight where learners were able to correct own errors		Slide **47**

	Event type 4 – Accept or decline placements **Say** something like ‘this is the RSVP and is done by the Education Provider’ Consider what round you are in when accepting requests. Requests not approved in round 1 will need to be resubmitted If there is an Asterisk *, need to look to see what the change is. Comments will show this **Point out** Now seeing benefit of colours • Green = approved • Blue = accepted • Orange = declined • Yellow = Not Approved Same approach as before • Select by clicking • Appropriate buttons become available • Asterisk indicates quantity ammended **Edit** • Some information read only, added when placement established • Can partial accept by reducing the quantity – placement is marked with an Asterisk • Comments added are viewable in the read only comments area		Slide **49** Slide **50**
	Practise: Accept Copies are in the Learners Guide Suggest each learner work through the scenarios alone of in pairs. If time is short, divide the room into 4 and allocate a scenario per group **Debrief** check for questions, highlight where learners were able to correct own errors		Slide **51**

Learning Check

Say something like:

> we have now worked our way through the Event Windows

Q: Any questions?

Q&A

quick, game show like, perhaps move around the room as you **ask** the group:

- Name 2 events managed by Education Providers?
- Name 2 events managed by Health Services
- What colour is an Accepted placement?
- A Requested but not yet approved placement
- What does a red asterisk on a placement mean?

Feel free to add other questions pertinent to your audience

Wrap

Recap main points: So at a high level, these are the steps:

- Set capacity through **review of profiles** information
- Make **requests**
- These are then **Approve** / Not Approve
- From what is approved, then **Accept** / Decline

Will receive **notifications** when windows open/close so make sure emails are monitored – address is user id

Q: Any questions?

Slide **52**

Link

Say something like,

reviewing our ClinConnect Timeline, we have just completed the Event Windows Part of the Timeline, next up, we look at the Manage Window

	Lunch and Link **Say** something like Now time for lunch on return, it's your turn to practise Mention any security guidelines re room, personal belongings Announce return time		Slide **53**

Module 5 – Manage Window - Student module

When	What	Who	Refer to
	These features should be well received by some learners as they contain some operational time-saving aspects of ClinConnect Trainers demonstrate the upload facility, practise this ahead of training. If you are not comfortable, you can use the slides and allow learners to do in a practise session Aims: Learners will know how to create a student be able to conduct a verification have experienced the use of a bulk upload (EP only)		
	Introduce module Create a student Verify a student Assign a student Mark commencement/attendance Bulk uploads - Using the templates	T1 or T2	Slide **54**
	Create a student Add a student by Creating a student record. Education provider ID is connected to your user id To edit students, first search then select the student to edit		Slide **55**
	Verify **Point out** Hovers help with explanations of verification requirements		Slide **56**

Assign students

- Search for accepted placements
- On results screen, use the Column Picker to adjust the view to suit
- Columns can be resized
- Results can be sorted by using column headings
- Enter Student information – notice AutoFill

Slide **57**

Attendance

2 steps

- Health Service records placement commenced
- Education Provider can mark attendance

1. HS - From Student Menu > View Attendance

- Displays Search Placements
- Search will return available students that are Verified and Assigned
- Select students
- Click ‘Commence Placement’ button

Slide **58**

2. EP - From Student Tasks menu > Record Attendance

- Displays Search Placements
- Search will return available students that are Verified and Assigned
- Select students
- Click ‘Daily Attendance’ button

Slide **59**

	Using templates Template is a guide to the data format required by ClinConnect. Currently available for: • Adding students • Assigning students Both are used by Education Providers High level steps • **Download** template • Add required data to **CSV** • **Upload** template ClinConnect does a validation before actually accepting the data from the spreadsheet • Review **validation** errors Build 1 – **errors!! Export to save** Build 2 – **errors exported** Build 3 – **no errors**, you are cleared for takeoff! Build 4 - **Success** • Free to spot check uploaded student data or assignments		Slide **60** Slide **61** Slide **62** Slide **63** has 3 builds
	Template demonstration Student tasks > Student details > Download Student Details template		

	Practise • Find and access Download to add a student • Select ‘open’ • View the column headings • Enter 3 students, perhaps from learners in the room • Save • Upload • View result Q: Questions		
	Wrap Recap main points Bulk uploads can save time, edit/replace improves data quality No undo button Errors don’t corrupt		

Module 6 – Manage window: making changes and creating placements by exception

When	What	Who	Refer to
	By now, learners should be feeling a degree of comfort with the event windows concept of ClinConnect. This module expands the learning to include placement and student activities that often arise Aims: to provide learners with an experience of making common changes to placements in ClinConnect such as • Moving students or changing the assigned student • Cancelling placements • Creating placements by exception Practises are now deliberately less directed, students should search and make changes working things out as they go.		
	Introduce module **Say** something like Having followed the 'Event Windows' path, now time to use ClinConnect with the typical things that happen. Outbreaks occur, people become pregnant, decide to travel – life in general can impact our students and placements In this module, we will look at: • Changing the assigned student • Cancelling of a placement by either Health Service or Education Provider • Creating a placement by Exception	T1 or T2	Slide **64**

Changing the assigned student (EP)

From a list of assigned students, you can easily change or cancel assignments

- From the Student Tasks menu > Assign Students
- Search placement status Accepted
- From the results, make sure you check the box on the left hand side of placement to wish to change or cancel
- Click ‘Clear’ and Save
- Can then enter the name of the new student taking up that placement

Practise

Find a placement to change the student

Notice how ou can begin to enter student information and auto complete begins

Slide **65**

Cancelling of a placement by either Health Service or Education Provider

Circumstances change and so placements may need to be cancelled by Health Services or Education Providers

Placement Tasks> Manage Placements

- Search for placements at Approved or Accepted
- Check placement to be cancelled
- Click ‘Cancel’ button
- Enter revise qty or 0 if cancelling completely
- Enter reason
- Save

Practise

Slide **66**

eg is HS

	Creating a placement by exception (HS) A Health Service option, • from the Placement Tasks menu > Create Placement By Exception • Search screen is shown • Select/Complete all details for the placement • Save • Placement is shown as **Accepted** **Practise** Freeform, training data base will be reset overnight		Slide **67** Build
	Wrap module **Recap** main activities **Q**: questions?		
	Link to next module Say something like So far we've covered (recap), Having recorded and managed this information, time to see how it might be used via reports and data export features		
	Break		Slide **68**

Module 7 – Reports

When	What	Who	Refer to
	Two parts to reporting information, via reports menu and via CSV export from the Print Icon. We begin with the menu option and finish with the export option. Aims Learners to be able to • Select and run a report • Change parameters and rerun the report • Identify 2 or more reports from the user guide that will be useful for their work • Export to CSV The information about each report will be sourced from the Learner Guide.		

Introduce module

In addition to the export facility via the Print Icon, there are more than 10 standard reports available in ClinConnect.

These are accessed from the Reports menu – **show this**

Running a report involves **2 high level steps**

- select the report from the report menu – **use Unit Profile**
- setting the report parameters using the criteria screen – **show example fields** e.g. date, drop down and view report but do not run the report
- Changing field content
  Note that when field content is changed, there might be a slight delay as ClinConnect updates the related parameters.
  When a change is made, you need to 'click' somewhere else for the change to be applied, then can click View Report

Q: Check for questions about the display, highlight that parameters will change depending on the report selected.

"Now going to look at the common elements of ClinConnect reports – not the results"

When ready, **click View Report**.

Slide **69**

reports menu

sample fields

Slides alternative

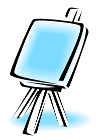
Slide **70**

	## Report format Things to note – **criteria and toolbar**: • Criteria remains available • Show / hide criteria – **hide criteria now** • Page navigation controls • Zoom display – **click down arrow** to show options • **Search** for text in the document – find and then move to ‘next’ instance • **Export** option – **click down arrow** and show range of choices including csv and pdf • Refresh/reload Things to note – **report detail** • all reports contain ‘**header’** type information from the Report Filters – on page 1 • Date/time report was run • Page 2 – Data Table – contains detail and ability to sort by column headings Rather than trial and error, let’s look at the range of available reports.....		Slide **73, 74**
	## Available Reports The **learner guide** has an explanation of each report. Turn to this now, and identify 2 or more reports that are of interest. One should be a **profile report** and the other a **placement report** (allow 5 mins reading time) (if needed, use table of contents to look up reports section) Let’s start with the **profile** report, we’ll step through this together		Reports section Slide **74**

	Practise 1 – 5 mins Select your **profile** report from the menu Change parameters to suit – use a broad range of dates and other parameters to ensure you get results Allow 5 mins to generate and view report		Slide **75** blank
	Practise 2 – 10mins Select your **placement** report from the menu Change parameters to suit – use a broad range of dates and other parameters to ensure you get results After viewing report, change some parameters and re-run		
	Reporting via Printing button **Introduction** **Explain** design intention, **say** something like: “As system being developed, need to be able to do more with output than just print it. Decided to use industry standard ‘csv’ so that you can then manipulate, reuse and print ClinConnect information to suit your needs” **Show** example **Explain** CSV “CSV is a common, relatively simple file format that is widely supported by consumer, business, and scientific applications. Benefits: • Strips data of formulas, formats • **Save as** – to migrate to an excel file and create print formats to suit – hide columns, apply formats, headers and footers, perform calculations and more – wouldn’t be able to do this with a print file		Slide **76** Slide **77** Slide **78**
	Learning check – exporting to CSV Find placements and use print/export Save as XLS file, format to suit		

	Summary **Say** something like Combining the print/export options throughout ClinConnect with the range of reports available via the dedicated reports menu should have most things covered. Remember, exporting data gives flexibility to configure the information to suit local needs – applications like Excel allow for further manipulation and more presentation options **Q:** Final questions about reporting? Where to get help – user guide, practise – can't break anything with reports		
	Now time to regroup and look at where we've been today in learning about ClinConnect		

Module 8 – Implementation plans and Wrap

When	What	Who	Refer to
	This is the final module and provides an opportunity to clarify final points, confirm any actions to be taken, check readiness for local rollout and reconnect the parts of the day for learners. Learning aims: • Ensure last questions/doubts are handled • Participants have an action list for implementation • Ensure participants know where to get help • Have all participants complete training feedback forms		
	Introduce Final part of our day • Quick recap • Take care of last questions • Gather your feedback • Share insights		
	Recap "Today we: • had and orientation to ClinConnect from the Business and System angles • had time for practise • looked at managing placements and exceptions • undertook a Learning check / Practice with scenarios • checked out the various ClinConnect reports you might use" Q: Any questions? Answer only if brief, this is not a time to go back to the computer as that would break the flow. For questions that require some time to answer, refer them to the help or ask to stay back and go through separately		 Outline 

	Implementation **Group discussion** **Q:** what actions do you need to take to begin using ClinConnect at your HS or EP? Perhaps flipchart/whiteboard this **Action Plans** Note actions you need to take in workbook, these might be conversations, data to set up; practise to do – anything that will help.		Slide **79, 80**
	Feedback **Say** something like: Important to gather your feedback to help improve the training, important that we collect these reactions now, not later turn to Feedback form in learner guide – note it's two sided Please take your time to complete these now and hand in before you leave Providing name and number will allow us to follow up		Slide **81**
	Take-Aways / Insights This is an important tool for helping learners to 'own' their learning from today. **Q:** Just quickly going around the room, we're going to ask each person to share – "what is one thing you will take away from today?" This helps us to know what you find most valuable May need to nominate someone to get the ball rolling e.g. 'Kathy, let's start with you" **Process**		
	Thank you and Ongoing support **Thank** you for your participation today. Help is available online – start at the ClinConnect section of the web site, or from the entry page of ClinConnect Now time to **Log Off**		

	Good- bye take belongings, guides		

Section 3: Appendices

Sample communications

These are suggestions only and should be tailored or re-written to suit your audience and local facilities.

Pre-training email

Subject: ClinConnect Training – Welcome and logistics

Body:

Dear <name>

I look forward to welcoming you in person on **ddd, dd mmm yy** for ClinConnect training. Here is some information that may help you to prepare for training.

Our start time is **9am sharp** and we expect to finish by hh:mm pm. Please contact me on _______ if you are unexpectedly delayed.

Morning and afternoon tea will be provided. Lunch can be purchased nearby or there are kitchen facilities if you would like to bring your own. There is also a vending machine for cold drinks.

Training materials will be provided on the day and if you would like to know a little about ClinConnect before training, please refer to the ClinConnect website where you will find briefing notes and background information.

Please let me know if you have any questions. I will be your trainer on the day and I look forward to seeing you then

Regards,

Post Training email

Dear <name>,

Thank you for participating in ClinConnect training.

Whilst I hope you found ClinConnect easy to understand and use, help is available via your local coordinator or at the ClinConnect website.

If you still have a feedback form, would you please complete and send it to me as soon as possible.

I enjoyed meeting you and wish you all the best with your clinical placement activities.

Kind regards,

Logins and Passwords

These will be emailed separately.

If, when logging on, learners are asked to change their password, please change it to ‘train’.

If the password needs to be changed to something else, please notify the ClinConnect project team via email with a list of the log ins that were changed and the password they were given. Thank you.

You may wish to staple a copy of your training logins here

Help and Useful links

ClinConnect Information

Information is provided via email and via the ClinConnect pages of the NSW Health website

http://www.health.nsw.gov.au/clinicalplacements/index.asp

Background to ClinConnect
http://www.health.nsw.gov.au/resources/clinicalplacements/pdf/clinconnect_background_in.pdf

Blank Student Placement Agreement (SPA)

http://www.health.nsw.gov.au/resources/workforce/other/student_placement_agreeme.doc

To access ClinConnect training database www.uat12.webapp.health.nsw.gov.au

User Guide

The user guide for ClinConnect is available from the dashboard of the application. It may also be made available via the website

http://www.health.nsw.gov.au/clinicalplacements/index.asp

Coordinators

http://www.health.nsw.gov.au/clinicalplacements/coordinator_contact_list.asp

Technical Support

Help desk, see the main website http://www.health.nsw.gov.au/clinicalplacements/index.asp

ClinConnect Mailbox clinical_placements@doh.health.nsw.gov.au

Your links

Learner guide

The Learner Guide is designed to encourage learners to annotate or flag material that is most relevant for them in order to increase retention. It does not replace the user guide

A copy of the learner guide has been provided separately.

Registration

Name	From (name of HS facility or EP location)	Discipline	Contact number (in case something is left behind)	Signature

Name	From (name of HS facility or EP location)	Discipline	Contact number (in case something is left behind)	Signature

Evaluation sheet

Name: ____

Date: ___/___/___

Training Feedback

please print responses

Health Service / Education Provider (please circle)

Discipline? __________________

Thank you for participating in the ClinConnect Training.
To help us to continue to improve ClinConnect training, please provide your comments, thoughts and general feedback regarding the day.

What did you come to the training hoping to achieve?

What did you achieve?

Which modules/content were the MOST useful? Why?

Which sessions/content were the LEAST useful? Why?

What suggestions for materials or course content would you like to contribute?

Please mark your response to the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The venue – location, facilities, environment – supported the training and my needs well *Comments*	☐	☐	☐	☐	☐
The administration and pre-training communications were effective and timely *Comments*	☐	☐	☐	☐	☐
I had ample opportunity to ask questions and contribute *Comments*	☐	☐	☐	☐	☐
The training was well facilitated *Comments*	☐	☐	☐	☐	☐
The timekeeping and pace were appropriate. *Comments*	☐	☐	☐	☐	☐
Overall I thought the ClinConnect training was a good use of my time *Comments*	☐	☐	☐	☐	☐

Finally, what would you say if someone asks you "How was the ClinConnect Training?"

Thank you for your time and contribution

Module - Train the Trainer

When	What	Who	Refer to
Nn:nn (Nn mins)	**Introduce module** Agenda Introduce Self		
	How to use the Trainers Guide Parts Layout of session plan Symbols		
	About the training content Training design and sequencing Key concepts • equip learner to work it out • less is more • reduce change impact but not overwhelming		This guide, page (outline)
	Admin - Pre-training show checklists emphasise need for practise need to be comfortable using alt+tab to move between browser and slides		Copy of this guide learner guide user guide
	Session Plan Step Through may loop through a couple of times use post-its and flags for your notes Step through each, pausing for questions at end of each session Q: Questions?		Post-its, flags Other materials s per Session plans Note questions on Flipchart or whiteboard

	Admin - Post training need to follow up learning transfer issues raised in training		handout envelop feedback forms
2 x 20mins +10min group debrief	**Learning Check** Guidelines • pick a partner and 10-15mins section of a session plan that helps you practise areas you feel least confident in • step through the section, standing if practicable, otherwise just rehearse the flow aloud • note challenges – self, materials • partner to be both learner and observer • partner debrief - 5 mins • swap, repeat • Group debrief / process learnings • deal with questions • emphasis need to practise		trainers guide clock / watch timing 10-15mins + 5min debrief repeat
	Support for trainers Mentor – explain concept and process Debrief process		

	## Debrief **Why** very powerful learning process, captures ‘recency’. Reflect on earlier debrief and how it aids development **When** Immediately after session Later with trainer coordinator (Toni?) or application manager **How** Handout: Reflection sheet Complete and optionally send copy Via telephone using reflection sheet share with local mentor		handout
	## Wrap • Recap main points • materials, support • Final questions • Where to get help Handover to Exec to Thank for role they will play		
	## Thank and goodbye		

Reflection sheet for Trainers

Initial reaction

What surprised me about that experience?

What met my expectations? What did not meet my expectations?

How did I feel before, during and after the training?

Doing things differently?

What would I do differently if I were going to do this training again?

What would I have done, read and/or who would I have met with to better prepare myself **before** this training?

What would I have done, read and/or who would I have met with to better prepare myself **during** this training?

Skills

What skills did I display most effectively during this training?

What skills do I wish I had demonstrated more effectively? How can I gain these skills?

What did I learn that I can apply to my current and future work?

Trainer Options

Handling Questions – The Parking Lot

This approach minimises question disruption but also invites questions. Ensure learner questions are handled well improves the learner's ability to listen. This approach captures the question before it is forgotten, validates the learner's participation without derailing the class, and gives the trainer time to research an answer if needed.

Post a flipchart page in the room at the beginning of the day and explain the guidelines for its use before class begins:

1. Anyone can ask a question any time.
2. Give the students post-it notes so they can capture and post their own questions as they arise
3. If the question pertains to the current topic (flow of instruction), it will be answered on the spot.
4. If it doesn't, either because the topic in question is coming up later or because that topic isn't covered, it will be 'parked' on the flipchart and addressed later, sometime before class is over (whenever the trainer decides it best fits).

Options:

- Decorate the flipchart page with parking spaces and/or question marks.
- Enhance the Parking Lot model with student names –it can lead to better quality questions, since their names are attached to it and when the answer is available/timely you may then ask the person directly: 'Does that answer your question?'"

Icebreaker

Speed placement

Instructions

- initial pairs
- free-form speed placement(dating)
- get to know each other in clinical placements context
- 2 mins with each person
- find out their name, rank serial number stuff plus (pick one of these)

  3 key tasks related to your clinical placement work
  3 areas you are curious about today
- Go

Allow 1-2 mins per pair depending on energy in the room.

Call ‘change’ when time is up

Notes:

Suggest you don’t put the question on the board as people have a tendency to stop making eye contact with each other and continually look at the written question

Debrief

- Highlight common themes, note on flipchart/whiteboard
- asterisk those that will be covered today
- seek more understanding of unclear points

- Trainer notes:

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