CPOE Training Check List

Preparation for CPOE training is very important. Without proper training end users will struggle with system functionality. It’s also important to ensure that training occurs within a reasonable amount of time prior to activation.

1. Identify students
   1. List providers who will be expected to enter orders into the EHR
   2. Identify support staff (Super Users) who will be assisting providers during activation
2. Identify content to be trained
   1. Decide on method(s) of training (e.g. computer training, class room training, 1:1 training, etc.)
   2. Create screen shots of system, as needed, for training purposes
3. Planning for training
   1. Number of classes needed (both Super User and End User classes)
      1. Keep in mind that you will not want to train end users more that 6-8 weeks prior to activation
      2. Estimate the length of class
      3. Identify number of devices available for training
      4. Using the length of class, number of end users needing training and the number of devices available, calculate the number of classes needed
      5. Add additional classes as not all students will be able to attend their original class time
   2. Trainers
      1. Estimate the number of trainers and room assistants needed
      2. Identify who will be instructors and who will act as a room assistants
   3. Schedule
      1. Reserve training rooms
      2. Schedule classes for instructors and room assistants first (they may need additional time in order to learn about the tenants of Adult Learning Theory)
      3. Schedule instructors and room assistants for training classes
      4. Schedule classes for super users
      5. Schedule classes for end users
      6. For 1:1 training, schedule times and locations available for training
   4. Create Educational Materials
      1. Curriculum
      2. Instructors Guide
      3. Super Users Guide
      4. Hand outs
      5. Tip sheets
      6. Training Videos (as appropriate)
      7. Competency Check Off (as appropriate)
   5. Ensure Training Environment has appropriate configuration and functionality
      1. Consider including a few specialty and multidisciplinary order sets in the training environment
      2. Consider including common order sets (e.g. top laboratory, imagining, pharmacy orders) in the training environment
      3. Ensure the training environment has enough test patients (one for each student and one for the instructor)
      4. Ensure that you have enough instances of the training environment or enough test patients for all of the classes in a day (you don’t want students reusing the same test patients)
      5. Ensure NO PRODUCTION DATA is in the training environment (due to privacy issues)
      6. Ensure training user ID’s have the appropriate security rights placed on them
      7. Test the training environment to ensure it is functioning properly (including printing)
   6. Create Class & Instructor Evaluation Forms
4. Communicate training schedule and sign up end users for class
   1. Utilize all available communication methods to advertise class or 1:1 schedules
   2. Communicate deadline to sign up for training
   3. Sign up end users for classes
   4. Sign up providers who wish to have 1:1 training
5. Hold training Classes or 1:1 Training
   1. Deliver training for providers
   2. Ask providers to fill out class & instructor evaluation form
   3. Review evaluation forms at least daily
   4. Communicate needed improvements/changes to all instructors and room assistants