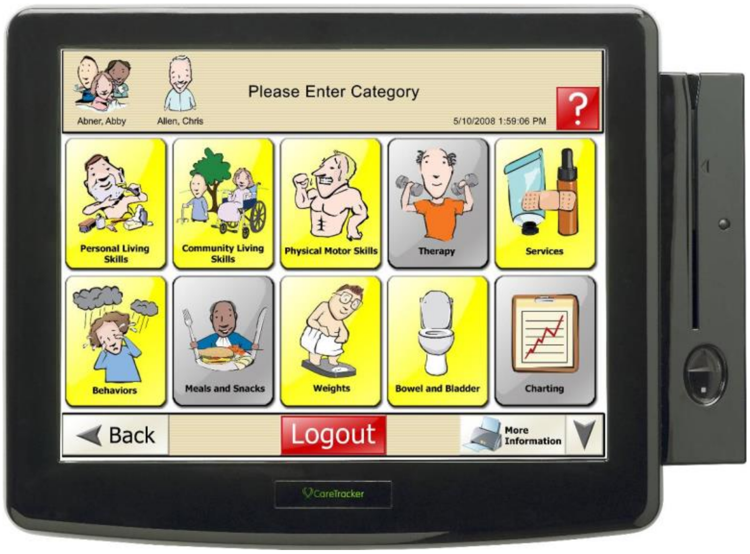
CARETRACKER TRAINING PROGRAM

Texas Department of Aging and Disability Services

Cerner

CARETRACKER TRAINING PROGRAM



NAME

TRAINER

DATE

Cerner Long-Term Care
140 South Friendship Drive
New Concord, OH 43762
800.338.3681
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Training Session Objectives

By the end of this two-day training session you will be prepared to have a successful CareTracker implementation that includes the following key aspects:

- Train-the-Trainer staff members will understand and be able to use CareTracker.
- Management team will discuss plan to train all direct support staff.
- Management team will be able to run reports to ensure data is being completed and frequencies are being met.
- Management team will be able to retrieve information for program updates and reviews.
- Management team will be able to review alerts and trends for individual documentation and system usage.
- Management team will identify key roles to ensure a successful implementation.
- Management team will be able to send messages to direct support staff in order to establish a more efficient communication program.
- An incentive program will be established to promote positive documentation habits and to monitor compliance goals.
- A plan to transition paper documentation to CareTracker will be created, and a go-live date will be established.
- A reasonable timeline will be put in place for future phases of the CareTracker implementation.

The CareTracker Method

1

Staff enters documentation in CareTracker throughout the shift.

2

Management Team has access to collected documentation 24-7.

3

Management Team can view supportive documentation for use on reviews, surveys, and more.

4

Management Team can use collected documentation to educate staff on accuracy.

CareTracker and You

List 3 ways that you would like CareTracker to help you with your job:

1. ____
2. ____
3. ____

Other ways CareTracker can help the entire organization (as discussed by other team members):

Day 1 Agenda

Time	Session	Attendees
8:15 – 8:30	**Training Kickoff with Project Leader** • Review upcoming day with Project Leader • Check kiosks for connectivity/speed • Workstations generate reports	Center Training Lead IT
8:30 – 9:00	**CareTracker Process and Decisions** • Introduction to the CareTracker Method • Review decisions regarding processes and responsibilities • Discuss strategies to achieve and maintain high compliance	QIDP Behavior Health Admin
9:00 – 9:45	**Management Reporting** • Learn ways to check compliance and accuracy • Understand how to monitor staff documentation • Identify missed observations • Management Report Practicum	QIDP Behavior Health SAP Writers
9:45 – 10:30	**Data Accuracy** • Learn how to delete incorrect observations • Understand why and how to make late entries • Data Accuracy Practicum	QIDP Behavior Health SAO Writers
10:30 – 12:00	**Quality Results** • Learn how to retrieve data in CareTracker • Understand program, service, and behavior reports • Quality Results Practicum	QIDP Nursing Behavior Health Hab Therapies Social Worker Dietary
12:00 – 1:00	**LUNCH**	
1:00 – 2:00	**Communication Tools** • Learn how to use staff messaging • Understand how to setup individual profiles • Communication Tools Practicum	QIDP Nursing Behavior Health Hab Therapies
2:00 – 4:00	**Person Centered Practices** • Learn SAP creation and process • Learn Behavior setup- Target, Positive, Psychiatric Indicators • Understand how to manage program updates and schedules • Program Review	QIDP Behavior Health SAP Writers Nursing
4:00 – 5:30	**Work Hour** • Trainer Available for questions and hands on guidance	Any

Day 2 Agenda

Audience: Super Users for Home Managers, Shift Supervisors, Unit Managers

Time	Session	Attendees
8:00 – 8:15	**Training Kickoff with Project Leader** • Review upcoming day with Project Leader	ALL
8:15 – 8:45	**CareTracker Process and Decisions** • Introduction to the CareTracker Method • Review decisions regarding processes and responsibilities • Discuss strategies to achieve and maintain high compliance	DSP 4's Unit Supervisor Voc Director
8:45 – 9:45	**Quality Results** • Learn how to retrieve data in CareTracker • Understand program, service, and behavior reports • Quality Results Practicum	QIDP Nursing Behavior Health Hab Therapies Social Worker Dietary
9:45 – 11:30	**Person Centered Practices** • Learn SAP creation and process • Learn Behavior setup- Target, Positive, Psychiatric Indicators • Understand how to manage program updates and schedules • Program Review	QIDP Behavior Health SAP Writers Nursing
11:30 – 12:30	**Work Hour**	QIDP Behavior Health SAP Writers
12:30 – 1:30	**LUNCH**	
1:30 – 2:00	**Management Reporting** • Learn ways to check compliance and accuracy • Understand how to monitor staff documentation • Identify missed observations	DSP 4's Voc
2:00 – 3:00	**Data Accuracy** • Learn how to delete incorrect observations • Understand why and how to make late entries • Data Accuracy Practicum	DSP 4's Voc Unit Supervisor
3:00 – 3:30	**Communication Tools** • Learn how to use staff messaging • Understand how to setup individual profiles • Communication Tools Practicum	DSP 4's Voc Unit Supervisor
3:30 – 4:00	**Wrap Up**	ALL

Project Team Roles and Responsibilities

OBJECTIVES

- Identify roles and expectations of the Project Team
- Discuss any potential challenges that could arise during the CareTracker implementation

PROJECT LEADER ____

- Primary contact person with Cerner Long - Term Care
- Conducts internal meetings related to CareTracker implementation
- Ensures meeting action items are completed
- Monitors CareTracker system usage and progress
- Highest security rights within CareTracker
- Ensures project team is fully staffed

TRAINING LEADER ____

- Schedules training sessions for all phases of CareTracker
- Identifies Train-the-Trainers to assist in CareTracker training
- Conducts continuing education sessions for current staff
- Trains agency or contracted staff on system usage
- Develops and implements plan to train new hires
- Responds to training needs as a result of staff surveys

Project Team Roles and Responsibilities

DOCUMENTATION LEADER____

- Leads discussions regarding documentation and changes to buttons and lights
- Ensures correct reports are being run and used properly
- Evaluates current procedures for effectiveness
- Works with Project Leader to introduce new buttons and phases of CareTracker
- Works with Training Leader to improve staff accuracy of documentation

COMPLIANCE LEADER ____

- Checks compliance daily and communicates with staff
- Completes follow up for missed observations
- Provides continuing education for staff on full participation and documentation throughout the shift
- Reports compliance trends to the management team
- Notifies Training Leader of staff needing additional education

Preparing for Go-Live

OBJECTIVES

- Understand how to access CareTracker and enter data
- Establish best practices for documentation
- Make key decisions regarding implementation

What is CareTracker Go-Live?

Go-Live is the date when your organization will utilize CareTracker as the single source of data entry for the areas of documentation defined by you in Phase 1 of implementation. This is the first step to achieving success!

What actions will you take in preparation? What processes do you need to review?

Actions
✓
✓
✓

Processes
✓
✓
✓

Independent Training

1. How do you select an individual's name? ______________________________
2. Which button must be selected to save the information? ______________________________
3. How do you navigate between individuals without logging out? ______________________________
4. Can you complete observations after the yellow lights are off? ______________________________
5. How do you know if you have a new message? ______________________________

Preparing for Go-Live

Workstation Access

Add the CareTracker website as a Shortcut on your desktop!

My Username is: ______________________________

My Password is: ______________________________

My PIN number is: ______________________________

Guided Training

1. How do you know if all the “lights” have been completed for an individual? For the whole organization?

---

2. What entry mode would you use when entering weights or meals for multiple individuals?

---

3. Where can you find the individual’s goal for each program? Method/staff instructions?

---

4. What should you do if you make a documentation error?

---

5. When should you use the Out of Facility button?

Preparing for Go-Live

My CareTracker Go-Live is: ______________________________

Phase 1 Documentation

Your Phase 1 implementation of CareTracker includes individual centered charting and schedules.

1. Who is responsible to review the programs and make changes if needed?

____

2. When will the program review be complete?

____

Staff and Individual Decisions

STAFF DECISIONS

1. Who will maintain staff in CareTracker? ______________________________
2. Who will update staff PIN numbers in CareTracker? ______________________________
3. Who resets a PIN number? ______________________________

INDIVIDUAL DECISIONS

1. How do individuals get into CareTracker? ______________________________
2. Who will be responsible for editing observations? ______________________________

Achieving CareTracker Success

OBJECTIVES

- Establish best practices for documentation compliance
- Discuss importance of staff engagement
- Learn how to use the Client Care Center

CareTracker Vital Signs

COMPLIANCE

Review the following scenario:

Goal: Joe will brush his teeth with 2 or less verbal prompts 70% of the time for 3 consecutive months.
Document: Met Criteria if Joe brushes his teeth with 2 or less verbal prompts
Criteria Not Met if Joe needs more than 2 verbal prompts to brush his teeth

A.

Tooth brushing	May 3, 2013	May 4, 2013	May 5, 2013	May 6, 2013	May 7, 2013	May 8, 2013	May 9, 2013	Total	Percentage Total
Met Criteria	1	2			1	2	1	7	70%
Criteria Not Met				1	1			2	20%
Refused			1					1	10%

70%

1. Did the individual meet the goal? **Yes / No**

B.

Tooth brushing	May 3, 2013	May 4, 2013	May 5, 2013	May 6, 2013	May 7, 2013	May 8, 2013	May 9, 2013	Total	Percentage Total
Met Criteria	1				1	2		4	57%
Criteria Not Met				1	1			2	29%
Refused			1					1	14%

57%

2. Did the individual meet the goal? **Yes / No**

3. How long would it take you to 'find' the missing documentation?

Achieving CareTracker Success

Four Steps to Achieve Compliance

Compliance of documentation ensures that you will have the data necessary to provide the best possible support to the individual and follow the individual's plan. CareTracker Excellence is defined as achieving the established compliance percentage for a 24-hour period.

1. SET COMPLIANCE GOAL

Determine your compliance percentage goal (most organizations chose 95%). __________ %.

2. ESTABLISH MONITORING PROCEDURES

It is important to monitor compliance each day and on a shift-to-shift basis, so any issues that may arise are found quickly and can be addressed.

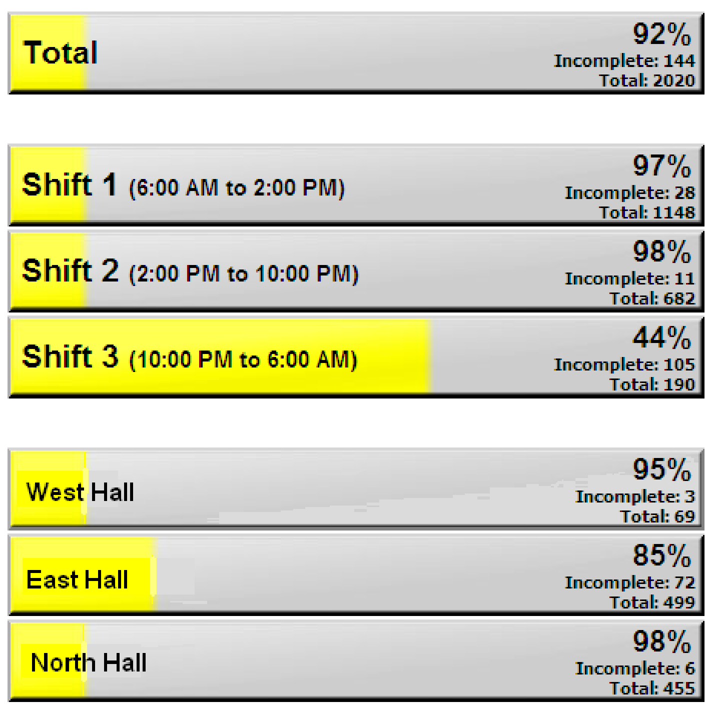
Shift-to-Shift Compliance Checks	Daily Compliance Checks
✓ Check compliance at least 1 hour before the end of each shift	✓ Routinely check compliance each morning for the previous day
✓ Run the **Summarized Individual Compliance Report**	✓ Review the **Compliance Widget** for the last 3 shifts
✓ Review the **Compliance Widget**	✓ Use **Performance Analysis** to report compliance trends to the management team

1. Who will check compliance each shift?

____

2. Who will check compliance each day?

____



Achieving CareTracker Success

3. STAFF ENGAGEMENT

It's important to promote positive documentation habits among your staff and acknowledge their hard work.

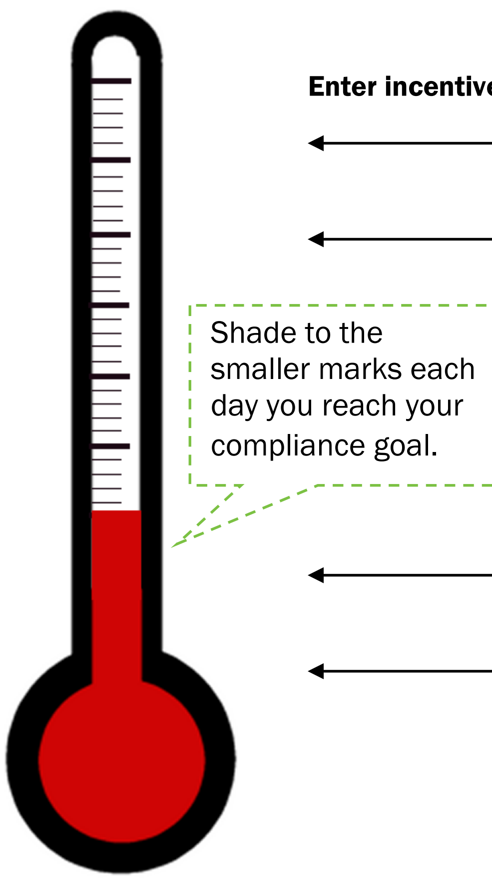
What will you do to create staff buy-in of the CareTracker system?

CARETRACKER EXCELLENCE THERMOMETERS

Hang "CareTracker Excellence" thermometers in each hallway or home. Every time you meet a compliance goal for the previous 24-hour period, shade to the next line on the thermometer. Use the lines to map out incentives for your staff. A visual incentive program allows your staff to see clearly what they are working towards. You can even make it a friendly competition among shifts or locations!

Staff incentives:

1. *Doughnut Day*
2. *Pizza Party*
3. *Free Lunch*
4. *Gas Card*
5. *Employee-of-the–Month*
6. ______________
7. ______________
8. ______________
9. ______________
10. ______________



Enter incentive for each mark:

Achieving CareTracker Success

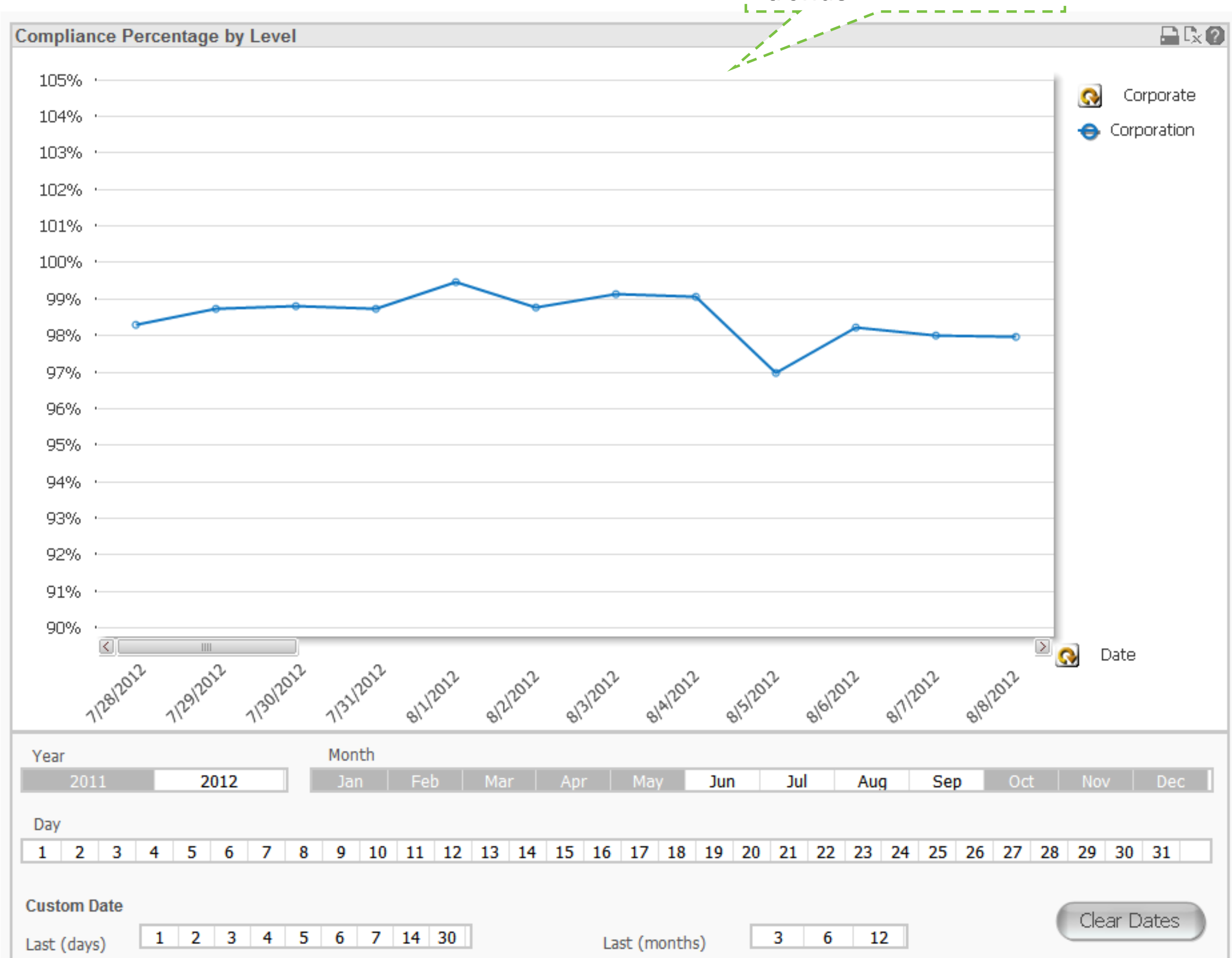
4. LONG-TERM COMPLIANCE SUCCESS

Long-term compliance is maintaining CareTracker Excellence for an extended period of time. It will be especially important to monitor long-term compliance after your initial implementation.

Key Resources for monitoring long-term compliance:

- Performance Analysis Viewer
- Compliance Trending tab

Check the *Compliance Trending* tab over several months to spot trends.



Achieving CareTracker Success

Staff Ownership

In order to identify staff ownership (and acceptance) of the system, surveys will be conducted 60 days after on-site training. The 60-day survey will help identify issues so you can provide more training or make adjustments to the system. Your trainer will send the surveys as a CareTracker message to your staff.

1. When will the surveys be administered? ____
2. Who is responsible for administering surveys? ___________________________________

Graduation Checklist

Over the next 4 months, you will work very closely with your CareTracker trainer to ensure that you are using CareTracker to its fullest extent. Periodically, measurements will be taken on how your organization utilizes your CareTracker system. The below items will be discussed on your follow-up calls.

- ✓ Average compliance percentage
- ✓ General system usage: Sending messages, running reports, correcting mistakes
- ✓ Programs updated/edited in a timely manner
- ✓ Staff training and acceptance
- ✓ Attending or watching at least 3 webinars on the Client Care Center

Staying Connected – The Client Care Center

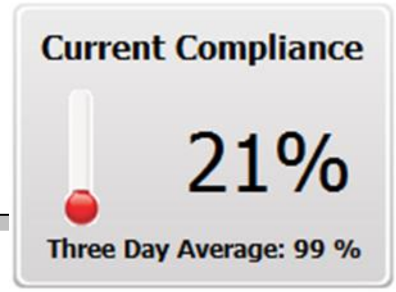
The Client Care Center provides many excellent tools to help your organization improve its utilization of CareTracker.

- Help Pages: These will walk you through steps on how to use each module and the solution processes
- Help Videos: Watch a step by step walk through different solution processes
- Ideas Page: Have an idea for CareTracker? Enter that information
- Live Webinars: Brush up on your CareTracker knowledge with a live sessions and the take advantage of the Q&A session
- See CareTracker Updates and Featured Topics

Management Reporting

OBJECTIVES

- Identify key reports and data from Clinical Intelligence
- Effectively use report selection parameters
- Easily monitor short and long-term compliance
- Create a list of reports and/or viewers you will use daily



Compliance

Use a Full time frame for daily compliance checks.

Review trends from the Performance Analysis link!

Compliance Checks	Why	When	Who
Compliance Widget			
Summarized Individual Compliance Report			
Missed Observations Report			
Compliance Trending			
Frequency Completion Report			

Management Reporting

Accuracy

Try this report in Summary format to see how many observations staff members have made.

Accuracy Checks	Why	When	Who
Observation Detail by Staff Report			
Observation Trending			
Report Trending			

REVIEW

1. How will you monitor daily compliance?

2. Which report can be run to view all staff documentation?

3. Why would you run the Missed Observations Report?

4. Where would you go to see if staff members are charting beyond the minimum requirements?

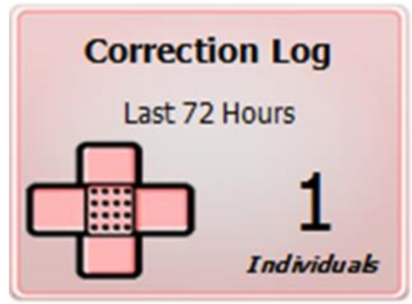
5. What is the difference between a Full time frame and one that is Thru Now?

Data Accuracy

OBJECTIVES

- Recognize ways to detect incorrect observations
- Learn the steps to remove incorrect observations
- Understand why and how to make late entries

Observation Editing



STEPS TO DELETE AN INCORRECT OBSERVATION

1.

2.

Don't forget to delete the Correction Log Entry!

3.

4.

5.

The Observation Edit/Late Entry Report shows all entry modifications.

Data Accuracy

Late Entry Kiosk

STEPS TO RUN THE LATE ENTRY KIOSK

1.

2.

Add Late Entries within 72 Hours!

3.

4.

5.

REVIEW

1. How do you know when a staff member has used the Correction Log button?

2. When looking at the individual maintenance page, why should you use the Observation Date drop-down?

3. When is it appropriate to use the Late Entry Kiosk?

4. What two things do you need to specify when running the Late Entry Kiosk?

5. What report can be run to see the comments made when editing observations?

Quality Results

OBJECTIVES

- Identify ways to use CareTracker data
- Discuss tools to help you retrieve data efficiently
- Learn how to pull information for daily, weekly, monthly reviews

Why do you collect data?

✓

✓

✓

For surveys

–

To track individual progress

Ensure happy, healthy individuals

What do you want for your organization?

Common Goals
✓ More happy, healthy individuals ✓ Lower staff attrition ✓ Less paperwork ✓ Better, easier surveys

Other ways CareTracker data can help your organization (as discussed by team members):

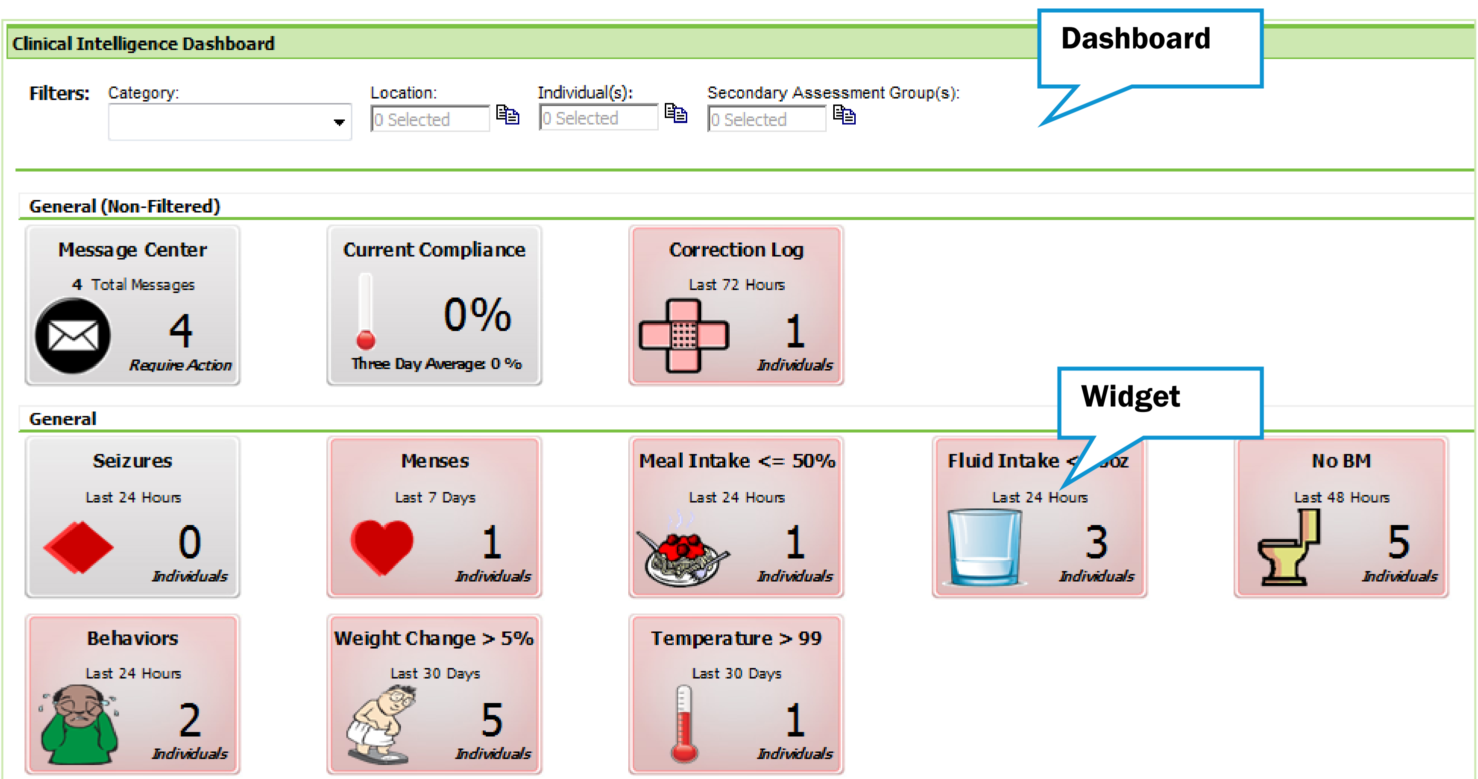
Quality Results

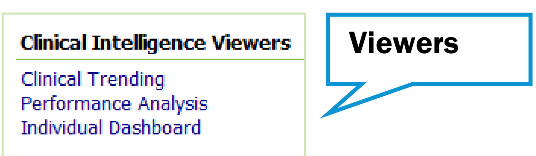
Daily Tasks

What information is important for you to act on each day?

Clinical Intelligence

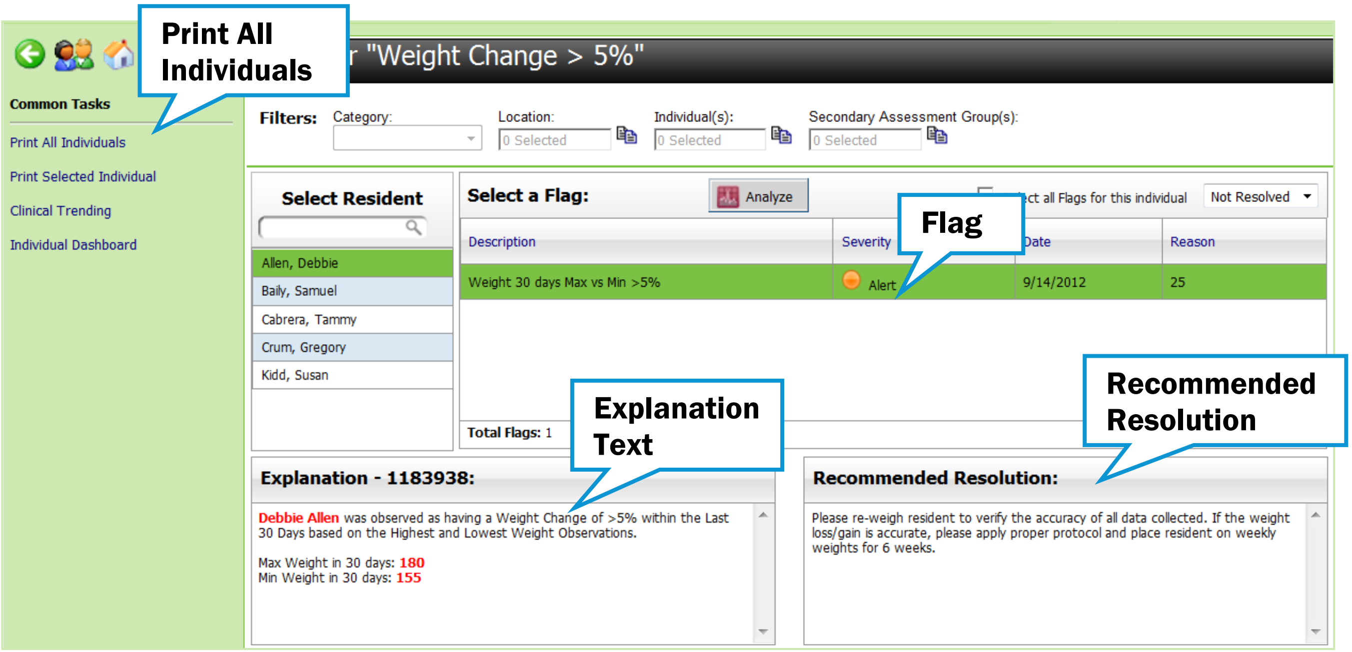
Use Clinical Intelligence to drive your daily routine. Clinical Intelligence filters your data and brings attention to the most important pieces of information. The Dashboard will help you to manage your daily tasks more efficiently.





Quality Results

Flag Screen



1. Click on a ______________________________ to see all individuals flagging for the alert.
2. The ______________________________ indicates patterns or trends in your clinical data.
3. Read the ______________________________ to see the data associated with the individual's flag.
4. Click ___________________________ to see a print friendly version of all individuals flagging on the widget.
5. The ______________________________ is your starting point for monitoring daily documentation.

What widgets will you be using?

What action needs to be taken if the widget is flagging and who is responsible?

Do you need to write a policy/procedure around this process?

Quality Results

Monthly Tasks

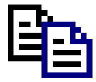
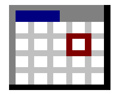
What information is important for you to review each month?

Key Reports		
REPORT TYPE	**REPORT NAME**	**PURPOSE**
Summary Report		
Detail/Detailed Entry Report		
Active Program Report		
Group Chart		
Individual Chart		

Quality Results Review

REPORT FILTERS

Use the images below as a reference to fill in the blanks. Each picture corresponds with a blank.

Edit My Reports button	Drop Down	Two Pieces of Paper	Custom Calendar	Check Box	Printer	Disk
						

1. Use the ______________________________ to select 1 specific location or 2 or 3 individuals.
2. Use the ______________________________ to add information to or remove information from reports.
3. Use the _________________________ to print a report, use the ________________________ to save a report.
4. Click the _____________________________ to adjust which reports appear on your reports tab.
5. Use the ______________________________ to run a report in detail format or summary format.
6. Use the ______________________________ to choose a specific date or time range to run a report.

DAILY TASK REVIEW

1. How do you view the observation(s) associated with a flag?

2. How do you print a list of all individuals flagging to a widget?

MONTHLY TASK REVIEW

1. Which report will you use for quarterly and annual reviews?

2. Which report type shows the staff member who entered the documentation along with the time?

3. What is the difference between group by day and group by month? When should you use each option?

4. Which report will you use to review the programs and schedules during the work hour or after your trainer leaves?

NOTES:

Communication Tools

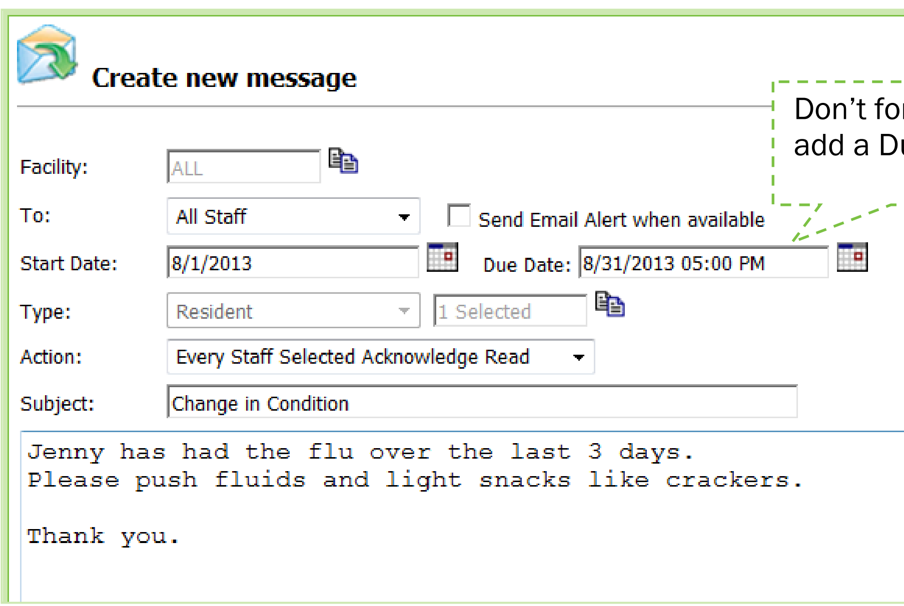
OBJECTIVES

- Learn how to send and receive messages
- Understand how to monitor message compliance
- Learn ways to utilize individual profiles
- Learn how to improve communication to the families of your individuals

Types of Messages

1. Send a CareTracker Staff Message to communicate important information to your staff.

Staff Message Examples	Individual Message Examples
✓ Staff Meetings ✓ Afternoon Outing/Activity information ✓ Change in Conditions	✓ Program Changes ✓ Scheduled Appointments



Don't forget to add a Due Date!

"Acknowledge Read" is like having a Read-Receipt!

Where do you go to send a staff or individual message?

How do you know staff members are reading their messages?

2. Send an Individual Message to communicate updates about your Individuals at the kiosk after tapping the individual's name.

Communication Tools

Individual Profiles

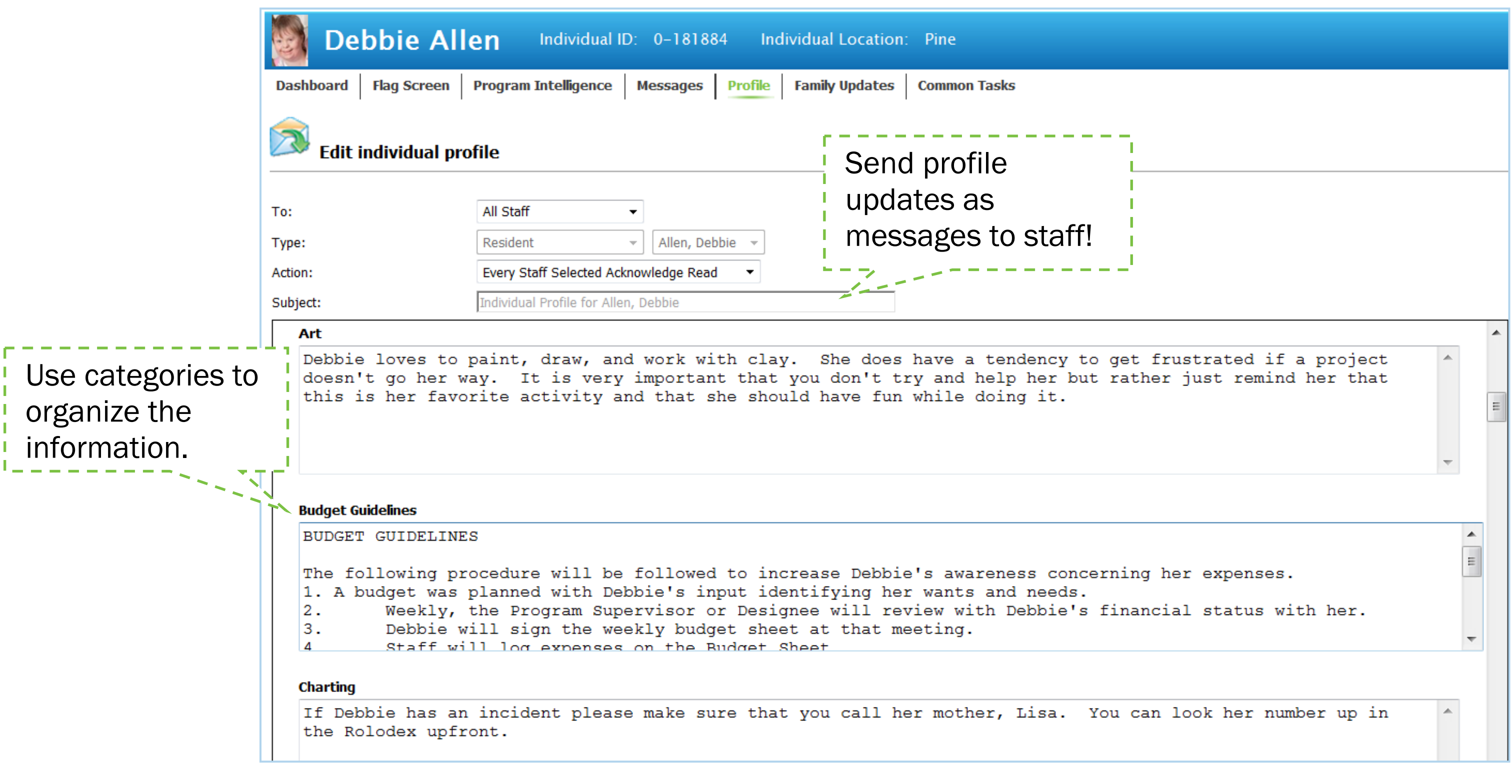
1. Use profiles to share important information about your individuals at the kiosk. Your staff can be prompted to read and acknowledge profile information, and quickly see changes to the plan of support.

Individual Profiles
✓ Likes and Dislikes ✓ Guardianship ✓ Behavior Support Plans ✓ Nutritional Summary

Where do you go to set up or edit profile information?

Who is responsible for entering/maintaining profiles?

2. Edit a profile from the Individual Dashboard.



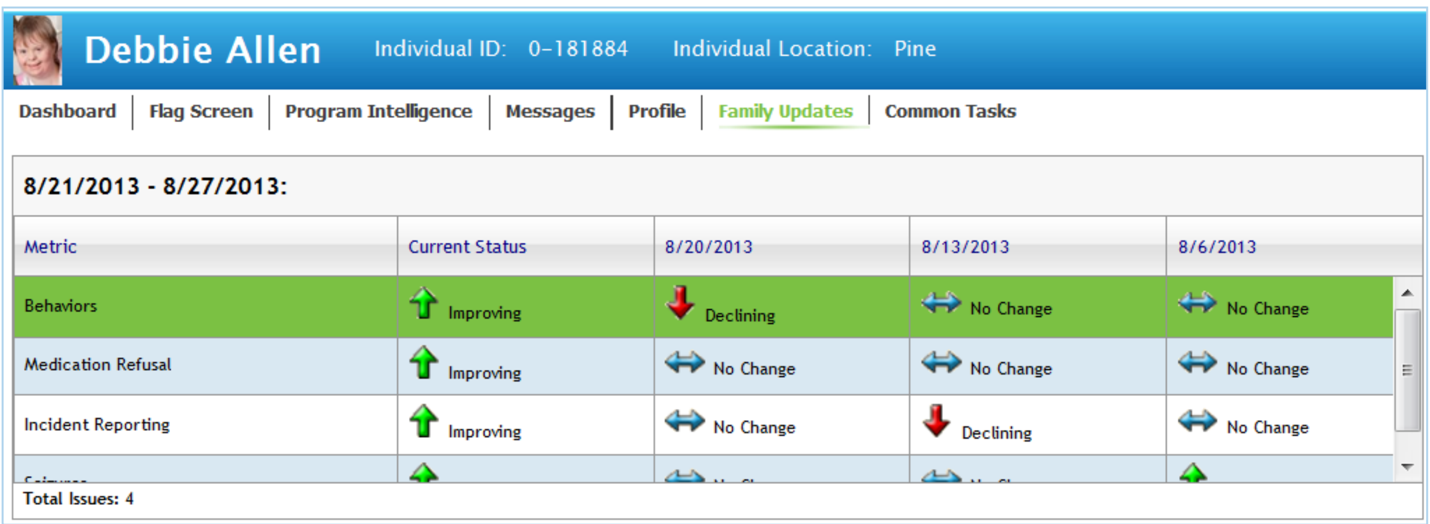
Which report shows the current profile information?

Communication Tools

Family Communication

How do you communicate with families/guardians about your individuals today? What challenges do you face with family communication?

Use family communication to send proactive updates about your individuals to families/guardians. Summarize information about Activity Participation, Behaviors, Incidents, Medication Refusals, and Seizures in a format that is easy to read.



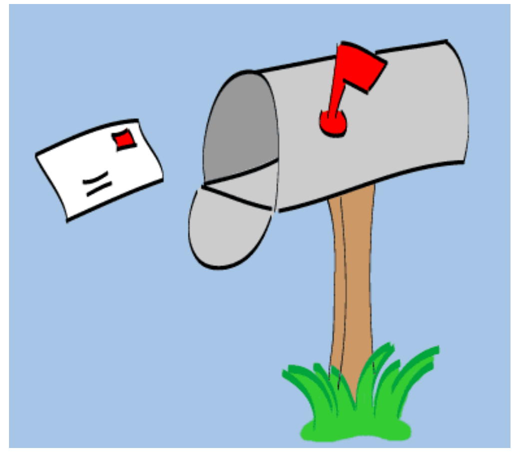
Add contacts under the Enter Additional Individual Information link!

How to start using Family Communication

- ✓ Family Communication – HIPAA Authorization Form
- ✓ Family Communication – Technical Requirements
- ✓ Family Communication – Getting Started

Who will be responsible for adding current family contacts to CareTracker?

Communication Review



1. Who can send messages? Who can receive messages?

2. After an individual plan meeting, you want to communicate program changes to your staff. How would you send this information to staff?

3. What message action will enable you to verify staff members are reading their messages?

4. How would you make sure the message is removed from your staff members' inbox at an appropriate time?

5. How long will you see acknowledgements on the Message Compliance report? What should you do with this report to see a history of compliance?

6. Where do you go to create/edit individual profiles?

7. Where can Direct Support Staff view the individual profile?

NOTES:

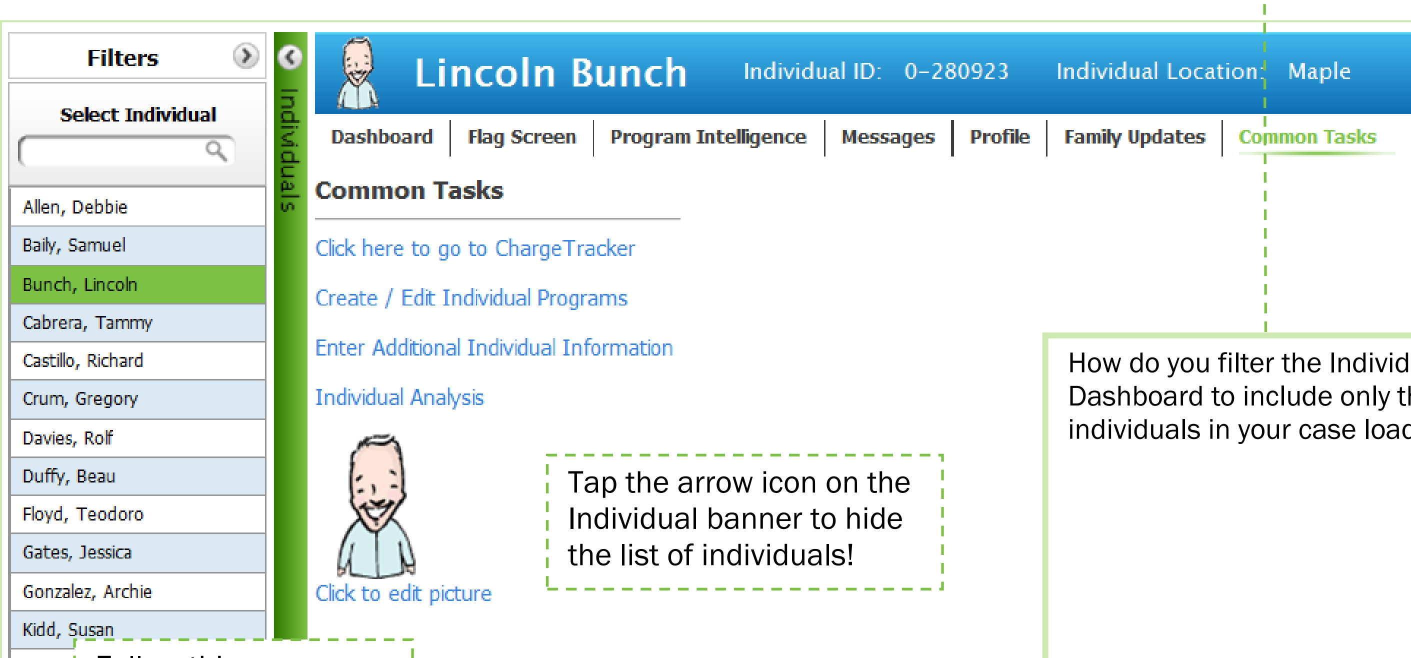
Person Centered Practices

OBJECTIVES

- Understand how to add, remove, and maintain individuals
- Identify person centered planning tools
- Learn how to update programs and schedule the lights

Person Centered Practices

Individual Dashboard



Tap the arrow icon on the Individual banner to hide the list of individuals!

Follow this process for Monthly and Quarterly reviews too!

How do you filter the Individual Dashboard to include only the individuals in your case load?

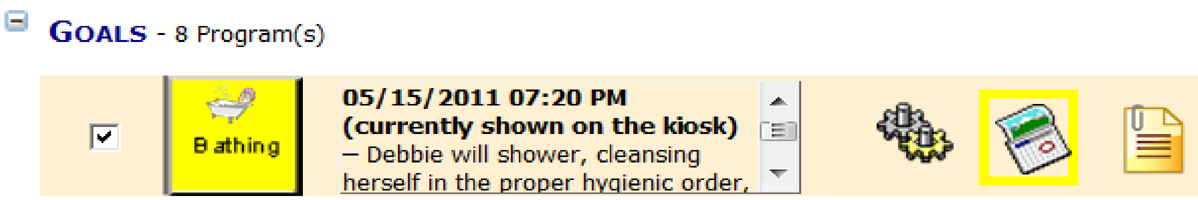
Which tab will you use to update programs?

Person Centered Practices

Program Library

What is done here?

- SAP Creation
- Target Behaviors, Replacement Behaviors, Psychiatric Indicators, Protective Mechanical Restraints, Medical Restraints
- Service Objectives
- Hab Equipment Checks and Indirect Therapy programs
- Preferred Activities
- Attendance for Day Program, Vocational, Retirement and School



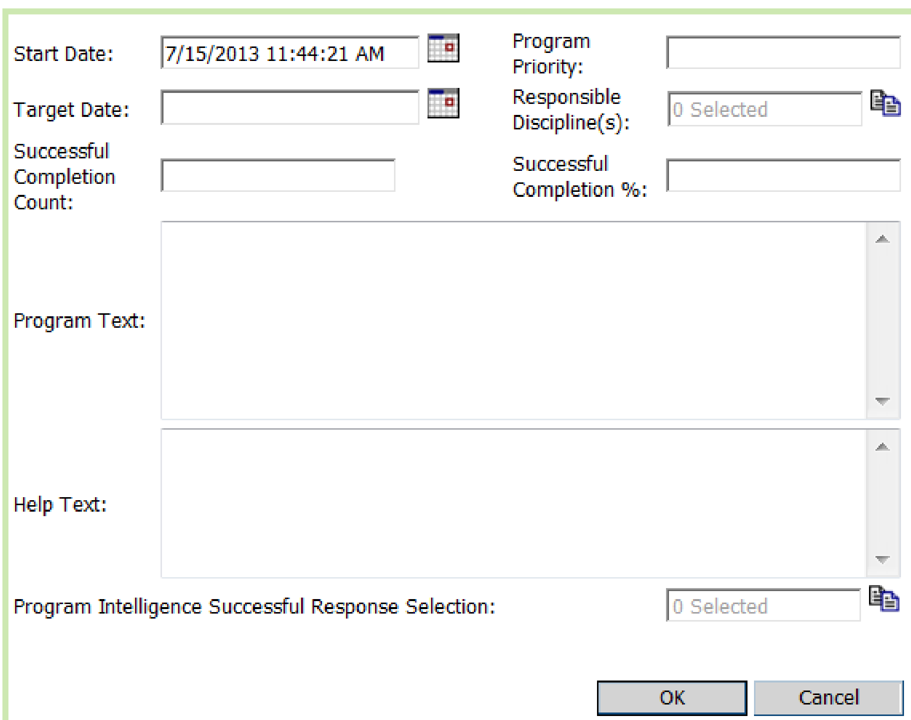
REVIEW

1. Which buttons show in the Active Programs area? Past Programs? Program Library?

Program Maintenance

Set a start date in the future for upcoming programs!

Don't forget to send a message to staff to communicate program changes!

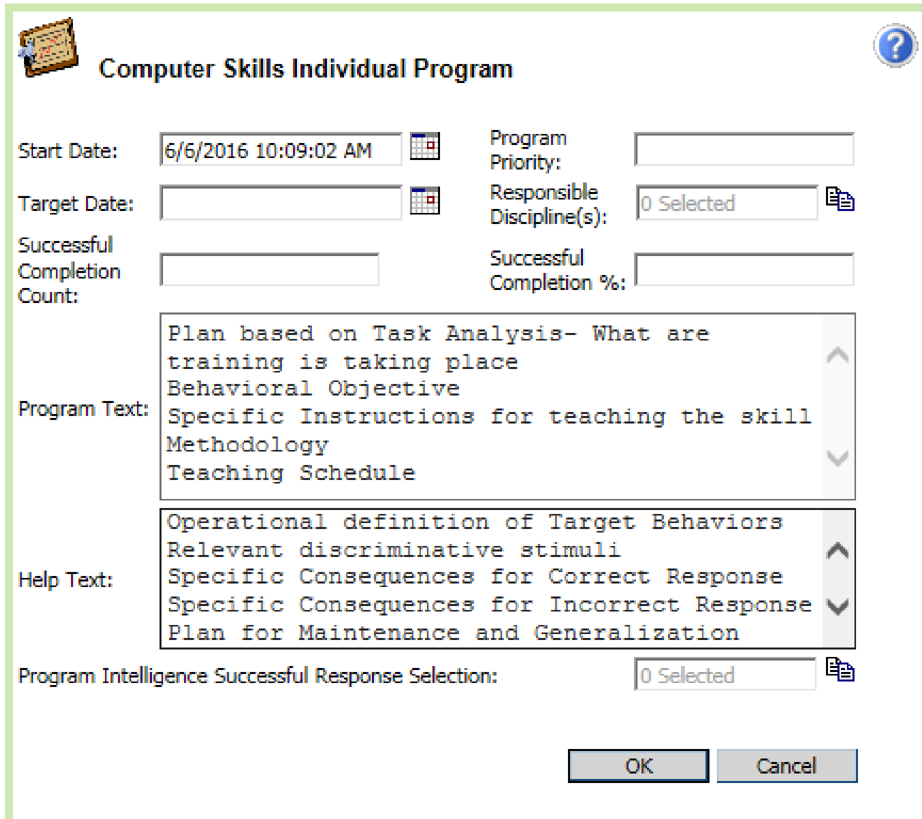


Person Centered Practices

SAP Creation

The 10 Criteria when creating a SAP has to be entered into either the Program Text or Help Text Boxes

After monthly reviews or ISP meetings also UPDATE the program



Two types of Person Centered Scheduling

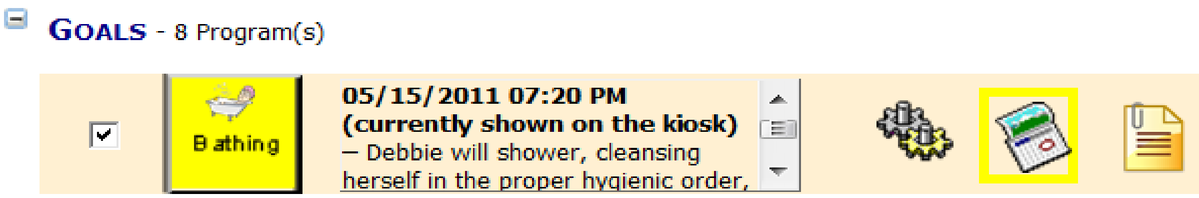
Frequency

Will show number of times to be completed and when the due date is. For example: Needs done 1 time before end of the week

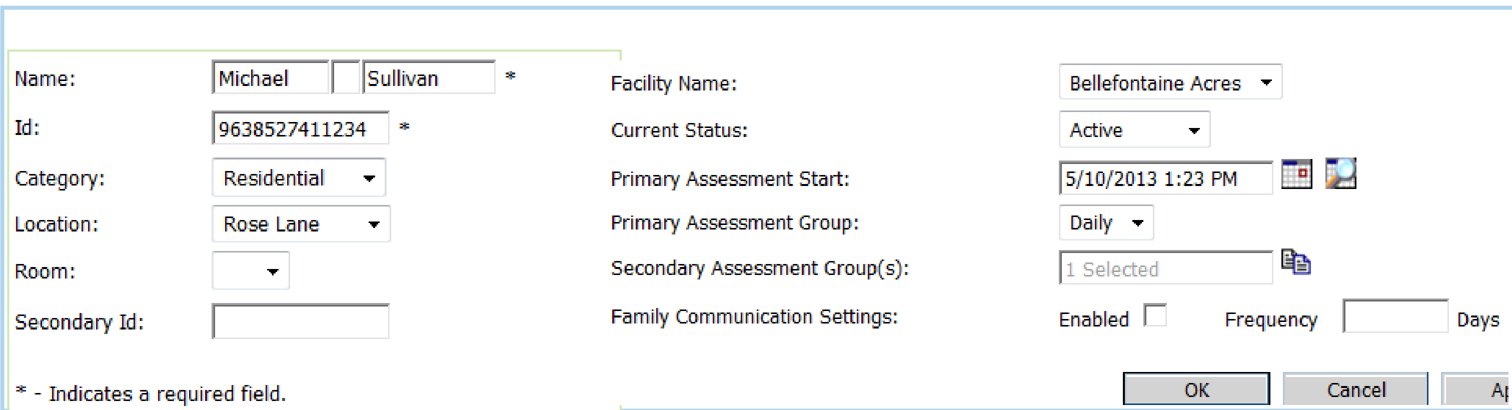
Shift Based

Documentation needs completed before end of shift

Note Entry



Secondary Schedules



REVIEW

1. How do you get to the program maintenance area?

2. Who would be adding/updating information in this area?

3. When would you view or update a program?

4. What type of information goes in the Notes area? What report can be used to view these notes?

5. What type of data tracking is scheduled as a secondary assessment group?

6. What are the steps to remove/add a secondary schedule?

NOTES:

CareTracker Practicum

Nursing Scenarios

There has been a procedure done on Amy, and medical restraints have been ordered. You have received the order and need to get the instructions out to the DSP's so that they can monitor the medical restraints. What would you do with this information?

Bobby has had specific care instructions setup for him. You need to make sure that the support staff are aware of this information. How would you go about making sure that they are aware of this?

You are starting your day and have logged in to CareTracker. You notice that one of the weight change widgets is flagging. What process would you walk through to review the information? From this review the team decides that Dani needs to have her weight checked weekly vs. monthly. How would you go about making sure this is done in CareTracker? Who would make this change?

You notice that one of your individuals has had a seizure and you want to look at the details around the documentation. Where would you go to see that information?

Behavior Health Scenario

You notice that an individual is again flagging on the New Behavior widget. What report can you view to see how many times and what behaviors have been listed? After careful deliberation and review you and team decide that this behavior needs to be tracked as a Target Behavior. You are wanting to get Baseline documentation (ABC) on this. How would you go about setting this button up in CareTracker?

Its monthly meeting time! You are going through to review behavior documentation for your case load. What reports will be important to view? Where can you find trending information? You need to report the number of Protective Mechanical Restraints used along with Crisis Intervention Restraints. Where can you find this information?

You are needing to add a Protective Mechanical restraint for Jenny, where in CareTracker would you go to place that information and assign the button for tracking? Walk through and list the steps that you would use.

CareTracker Practicum

SAP Creation Scenario
What are the 10 requirements when writing a SAP?

How do you add an entirely new SAP for an individual?

You have just had a monthly meeting and see that Jonas has achieve the level of mastery stated for the particular step being tracked. How would you update that information so that staff know to start documenting/collect data on the next step?

QIDP Scenario
You are preparing for a monthly meeting and need to pull data for an individual. Which report would you use to find the data to show the progress for that individual's SAPs?

You have met for the monthly meeting and it has been determined that an individual needs to have additional meals scheduled for them. How would you add that information into CareTracker?

Following an ISP it has been determined that you are going to discontinue a SAP for an individual. How would this be done?

You notice some discrepancies in documentation and want to take a deeper look. What reports can you view to see all the details around the documentation in question?

CareTracker Practicum

Unit Managers and Home Managers

You arrive at the Center and need to check compliance for your unit/home for the last 24 hours. What reports would you use to find out this information?

You are looking at the Homepage Dashboard and notice that the Correction Log widget is flagging, what are the steps to remove an incorrect observation?

When is it acceptable to use the Late Entry Kiosk?

Shift Supervisors

It's an hour before the end of the shift and you want to make sure that all the necessary documentation is completed for the shift. How could you determine this?

Your shift is coming to an end and you are finishing up your tasks for the day, what reports do you need to place in the Communication book for the next shift?

You notice that you have a staff member that is consistently late with entering in their data, what can you do to help this person?

CareTracker Practicum

Scenario – Messaging

Five of your staff members' CPR certifications will expire next month. You have two classes coming up and want to let these staff members know that they need to sign up for one of them. How can you communicate this in a message?

What report would you use to know who has and has not acknowledged the message?

One of your individuals is going on an outing tomorrow and you want to make sure your staff has the person ready to go at 5:00pm. How would you set up a message to share this information with your staff?

Scenario – Individual Profiles

One of the individuals in your home has a fluid restriction. Where would you put this information in CareTracker? Where would it appear on the kiosk?

You are preparing for a meeting with Mr. Smith's family and want to show them the profile updates for Mr. Smith. Which tool would you use to review the profile with the family?

CareTracker Practicum

Scenario – Quality Results

After logging in to CareTracker you notice the Behavior widget is showing that 3 individuals in the building have had a behavior documented within the last 72 hours. How do you determine the names of the individuals flagging to this widget?

How can you print this information?

What are the names of the Clinical Intelligence viewers and what types of information will they show you?

Scenario – Compliance

Last week you were vacationing in Hawaii. After being out of the office for an entire week, you are interested in checking staff documentation for the last 7 days. Name three ways you can check compliance for the last 7 days in CareTracker.

Scenario– Data Accuracy

You arrive for your shift and are looking at your dashboard to check the widgets for any documentation alerts. You notice that your Correction Log Widget is Red. What process do you follow next to ensure the accuracy of the observations?

Management Huddle

OBJECTIVES

- Discuss Day 1 of training and open issues
- Review data back-up and system change processes
- Identify CareTracker device maintenance and best practices

Actions and Open Issues

Trainer:

- ❑ Train-the-Trainer staff members trained

Training Leader:

- ❑ Documented plan to train all staff members

Project Leader:

- ❑ Outage contact identified

- ❑ IP address add/security change contact identified

- ❑ Support process discussed

Open Issues	Responsible Party	Notes

Management Huddle

Kiosk Review

1. What is the only acceptable way to tap the kiosk? What should NOT be used?

2. What is the best way to clean the screens?

3. What should you do if the kiosk freezes?

4. On the kiosk, what does a green Cerner logo represent? What does a blue Cerner logo represent?

5. What should you do if there is a power outage?

NOTES:

NOTES:

Training Wrap-Up

OBJECTIVES

- Establish action plan for open issues
- Confirm compliance plan
- Finalize staff ownership survey process
- Determine action plans for next phase

TRAINING REVIEW

What is the general feel for CareTracker by direct support staff? ____

____

What is the input from the Case Manager(s) and Program Director regarding the system? ______________________

____

OPEN ISSUES LIST

List below any open issues that need to be addressed in order to make CareTracker successful at your facility. Outline the action in place to resolve the issues.

Open Issue: ____

Action Plan: ____

Responsible Party:________________________________

Open Issue: ____

Action Plan: ____

Responsible Party:________________________________

Open Issue: ____

Action Plan: ____

Responsible Party:________________________________

Action List

This is to be used by the organization and CareTracker trainer to establish a timeline for completing actions during the exit interview. These should include open items for the organization personnel and specific actions and dates for the trainers.

Action	Responsible Party	Due Date
Go Live Date		
Organization to update all programs and schedules		
All staff trained on CareTracker devices		
Complete Homework tasks on the Client Care Center		
2-week follow-up conference call with CareTracker trainer and the Project Team		
30-day follow-up conference call with CareTracker trainer and the Project Team		
Continuing Education Webinars are scheduled for: • Best Practices • Copy a Series • Messaging • Profiles		
Surveys administered (60-day)		
60-day follow-up conference call with CareTracker trainer and the Project Team (will discuss survey results)		
Trainer to contact facility to begin planning Phase 2		
90-day follow-up conference call with CareTracker trainer and the Project Team		
Graduation conference call with CareTracker trainer and the Project Team (will discuss graduation metrics)		

Thank you for your purchase of CareTracker!

For questions or assistance with your CareTracker system
Please contact the CareTracker Client Care Team at:

1-866-459-3382
www.discovercaretracker.com

What can I do to ensure CareTracker success?

____

____

____

Key Decisions made at training:

Our daily compliance goal is: _____%

Shift-to-shift compliance checks will take place: ______________________________________

Daily compliance checks will take place: ______________________________________

Our CareTracker Go-Live date is: ______________________________________

Paper documentation for Phase 1 will be removed on: ______________________________________

Our 60-day surveys will be administered on: ______________________________________

Ideas for Phase 2 documentation include:
____

CareTracker Team Roles and Responsibilities:

Project Leader: ______________________ Compliance Leader: ______________________

Training Leader: ______________________ Technical Leader: ______________________

Documentation Leader: ______________________

Need Help? Have Questions?

My CareTracker Trainer is: ______________________ **Email:** ______________________@cerner.com

Contact Cerner Connect at: 1-866-459-3382