Want to invest in training for your Vital Records, but don't know where to start? Learn industry tips, do's and don'ts, and best practices so your state has guaranteed success

This picture is one you know well: you have a new Vital Records system, or are in the process of implementing one, and you now must think about how to actually get everyone *using* the system. From internal and external stakeholders to your own staff, your focus now needs to be on training for the system users, but knowing where to start can be extremely hard. Fortunately, we've put together some key Do's and Don'ts, Best Practices, and what to look for when hiring an outside trainer. Read below to learn the tips that will help your state be successful in the training of their new system.

Best Practices

Preparation is key! It is important that states do the following:

- Include ALL external and internal stakeholders in their training plans and budgets
- Incorporate CDC Cause of Death reporting standards into training curriculum
- Prepare to collaborate closely with your trainers, as well as all stakeholders. Establishing buy-in is crucial for success
- Give adequate notice to your team so they can make allow time in their schedules for the training
- Work with your trainers to provide the right level of training for various end users

It is a best practice to hire an outside consultant to assist in the training process, as this ensures all stakeholder groups are considered and that the training doesn't add an unnecessary burden to your staff's already full schedules. When hiring trainers, look for the following qualifications:

- Look for a trainer/company that emphasizes close collaboration with the state team
    - Bonus if the trainer is someone who has experience working with your state and other state systems, so they come to the table with a strong knowledge base and years of practical skills to make your process easy
- Ideally find a Trainer/company that has thorough knowledge of Vital Records systems, so they understand the ins and outs and can provide in-depth training on it
- Seek a Trainer/company that offers the highest number of attendees in all trainings possible. These are typically achieved through proven methods of communication (i.e. persistence phone calls, unique emails, etc.)
- Hire a Trainer/company highly knowledgeable in both the Model Law and the CDC Cause of Death coding, with first-hand experience in training in both
- Find a Trainer/company that utilizes the Train the Trainer approach
- Look for a Trainer/company that has preexisting templates and tools, from past training experiences, to streamline the process saving you time and money

- Hire a Trainer/company that uses proven tracking methodologies to ensure all stakeholders are accounted for, and are able to report directly to the state on the ones that didn't participate or didn't show up
- Seek a Trainer/company that has utilized multiple styles of training to be cost-effective, and attendee-effective (i.e. remote and in person training, etc.)
- Employ a Trainer/company who emphasizes having a skilled scheduler as a resource – this is absolutely necessary when working with many different stakeholders across the state, both internal and external This saves costs and increases attendee participation for all trainings, tailoring the needs to match specific groups

Do's and Don'ts

Do:

- ✓ Provide thorough and accurate lists of ALL individuals to be trained to your Trainer
- ✓ Have a Training Vital Records field representative
- ✓ Schedule and attend regular status updates with your Trainer to help them identify any other individuals that may have been missed initially
- ✓ Coordinate with the Training staff/company you hire to build out a detailed training curriculum
- ✓ Be open to using both remote and in person training, depending on the stakeholder groups needs

Don't:

- ❖ Overlook Cause of Death training as part of the application training
- ❖ Exclude the lower level staff who utilize the system. While it is important to start training the highest users first, it is important to train all those involved to have an efficient and seamless process
- ❖ Limit your thinking based off budget alone – there are many cost-effective ways to train different stakeholder groups that can save you money in the long run
- ❖ Wait to start planning training until your system is ready to be rolled out – planning on the front end will make training more efficient
- ❖ Hire Trainers/companies that have no experience in Vital Records – previous experience is key to being smart with your budget, and putting the allocated resources to the most important elements

In addition to the above Best Practices and Do's and Don'ts, a high-level sample of a possible Scope of Work has been outlined below, to help you understand how the collaboration and training process might take place:

The purpose of this proposal is to provide training services for the Electronic System for State of X, with the goal of onboarding all Stakeholder groups, both internal and external, by X date.

Tasks

1. *Create Training Plan in collaboration with state project sponsor*
2. *Conduct Project Initiation*
3. *Stakeholder Group #1*
    a. *Create and validate Training Materials*
    b. *Obtain and verify trainee contact information*
    c. *Schedule Training*
    d. *Conduct Training for Vital Records*
    e. *Conduct Training Stakeholder group*
    f. *Track Progress and report to state*
4. *Stakeholder Group #2*
    a. *Create and validate Training Materials*
    b. *Obtain and verify trainee contact information*
    c. *Schedule Training*
    d. *Conduct Training for Vital Records*
    e. *Conduct Training Stakeholder group*
    f. *Track Progress and report to state*
5. *Status Reporting*

Assumptions

- *State will provide vendor with all contact information for stakeholders to be trained*
- *All Vital Records staff (including Field Rep., staff and Manager) will be available for training, meetings and regular status updates as needed*
- *Vital Records staff to assist/participate in training of stakeholder groups as agreed per training plan*
- *Trainings and services to be provided X% remotely, X% in person*

Performance indicators

- *Deliverable #1*
    - *Detailed training documentation (i.e. Train all Medical Certifiers between July-Dec '18)*
    - *Acceptable performance (Provide tracking reports on progress)*
    - *Monitoring methods*
    - *Status reports*
- *Other, as agreed upon per training plan*

While this might seem like a lot of information to take in, these are proven methods that work in the field, and in remote training. Utilizing them and beginning to frame your thinking to incorporate these training methodologies will ensure your state achieves successful and effective end-user system utilization for years to come.