TRAINING COMMITTEE AGENDA

Date December 8 2015, 8:30 to 9:30 AM, teleconference

Charge of the Training Committee: identify training needs of PH-Doc users and coordinate training activities with Xerox and user members based on users' preferences and needs.

Committee members:	Co-Chairs: Terri Oliver and Lisa Klotzbach
1. Terri Oliver - Polk 2. Lisa Klotzbach - Olmsted 3. Mary Thompson - Xerox 4. Jennifer Donahue – Freeborn 5. Coral Ripplinger – Dakota 6. Nancy Borchardt – Steele 7. Erin Karsten – Dakota 8. Patsy Nelson – Otter Tail 9. Lea Butterfield – Rice 10. Sara Paulson – Xerox	Moderator: Lisa Klotzbach Evaluations: Terri Oliver Reports: Enhancements 12/18/15 (Terri) and User 01/29/16 (Lisa) Minute taker: rotating volunteer

I.   **Welcome**: changes to the agenda, announcements?

II. **Review feedback from recent trainings:**

    a. Oct 13: More Security

    b. Oct 27: Import Spreadsheets

    c. Nov 3: Direct messaging

    d. Nov 17: DP&C Documentation

III. **Discuss ideas to improve trainings:**

    a. Muting all Lines options (Sara)

    b. Feedback surveys completion

IV. **Review upcoming trainings:**

    a. CANCELLED: Dec 15: Reporting for Grants from PH-Doc, Diane Thorson (Otter Tail)

V.   **Plan for 2016 trainings:**

    a. Report back your agencies preferences:

        i.   Accounts Receivable

        ii.   Merging and Purging Client information

        iii. Pulling Reports from documentation: interventions and forms

        iv.   More Population Reports examples

        v.   MN Choices/LTCC documentation

        vi.   Agency Alerts

        vii. Chart Audits: HIPPA breach reporting

viii. More Elements set up

ix. Overview of Tools repository on Xerox website

x. Using the Blue Button: setting up outgoing CCD, using Client CCD

xi. EHDI & Birth Defects documentation

xii. Managing PH-Doc and MEDSS documentation

xiii. Evidence Based Pathways: what pathways are available, how to set up, how to use, and Omaha System components

xiv. How to use the SQL Center to run reports

xv. Strategies to Orient new Employees to PH-Doc

xvi. Immunizations: documentation of, MIIC, tracking inventory, billing, running MnVFC and UUAV annual reports

xvii. Community Event charting: TB example

xviii. How to use Dashboard functions

xix. Direct Messaging Use Cases

xx. Basic PH-Doc: Intro to Documentation

xxi. Basic PH-Doc: Intro to Accounts Receivable

xxii. Basic PH-Doc: Intro to Reports

xxiii. Basic PH-Doc: Intro to PH-Doc Tech role

xxiv. How to Set up Word/Forms Letters

xxv. Documenting Home Care in PH-Doc, step by step

b. First Quarter 2016:

i. Jan 5: How to set up a Word/Form Letter, Tanya Ruth (Xerox): CONFIRMED

ii. Jan 19: DP&C Part 2 and Xerox Tools Repository, Christine Lees (Dakota) and Jill Betzold (Xerox): CONFIRMED

iii. Feb 2: Exporting/Importing Problems, Sara Paulson (Xerox): CONFIRMED

iv. Feb 16; March 1; March 15:

1. Accounts Receivable, _____??

2. Direct Messaging Use Cases, Maureen Munsell (Otter Tail)

3. MNChoices/LTCC documentation in PH-Doc Panel; Angel Korynpa (Polk), Marisa Hynes (Olmsted), _____??

c. Later in 2016

i. Spring: Documenting SHIP work in PH-Doc, Kristine Erickson (Otter Tail)

ii. Fall: EHDI & BDIS Documenting and Strategies for documenting in both PH-Doc and MEDSS; Sara Brakke and Erin Karsten (Dakota)

Next Meeting: Tuesday, January 12, 2015 at 8:30 – 9:30 AM