Train-the-Trainer (T3)

Process Manual

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Version 1.1

Train-the-Trainer Process Manual

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List of Acronyms

CCO	Contact Center Operations
CD	Compact Disk
CMS	Centers for Medicare & Medicaid Services
CSR	customer service representative
HICN	health insurance claim numbers
ID	instructional designer
LC	Learning Central
LMS	learning management system
HTKR	Healthcare Training and Knowledge Resources
NGD	Next Generation Desktop
PHI	Protected Health Information
POC	point of contact
SME	subject matter expert
SOP	standard operating procedure
T3	train-the-trainer
TQC	Training, Independent Quality Assurance, and Content

This process manual is used to help prepare for in person train-the-trainer (T3) courses held at Contact Center Operations (CCOs). The process manual is intended to complement any standard operating procedures (SOP) written for T3s and is not intended to set policy.

Training, Independent Quality Assurance, and Content (TQC) Team Roles

To ensure a successful T3, a team of three key individuals is present. They are the facilitator, subject matter expert (SME), and driver.

Facilitator Role

A facilitator serves as the point-of-contact (POC) for the T3 and conducts the majority of the lessons. A facilitator's responsibilities include:

- Coordinating travel arrangements.
- Being aware of specific Centers for Medicare & Medicaid Services (CMS) requests.
- Communicating with the CCO POC.
- Coordinating the facilitation of the curriculum.
- Coordinating and communicating with the TQC Training Team manager and SME Team manager.
- Coordinating printing and shipping materials.
- Working with the SME and driver to ensure a smooth delivery.

The facilitator also records the time it takes to deliver each lesson. TQC, the CCO, and CMS compare this time to the expected delivery time as shown on the curriculum road map. The driver records the facilitator during each lesson and any decisions taking place during the T3, for example, shifting the roadmap if the class gets off schedule.

Subject Matter Expert Role

The SME is responsible for locating answers to questions that come up during the T3. If the SME knows the answer to the question, he or she answers it at that time. If the SME is unsure of the answer, the SME adds the question to the Parking Lot. The SME then sends the question in an e-mail to other SMEs (not attending the T3) to search for the answer.

The SME is responsible for recording questions and comments as stated in the Comment Spreadsheet section.

If the SME is comfortable with facilitating, he or she may facilitate lessons at the discretion of the facilitator, and following approval from TQC Training Team manager and SME Team manager. This is a decision that should be made prior to the T3.

Driver Role

The driver is responsible for navigating the classroom computer through lessons and Next Generation Desktop (NGD) while projecting images on a screen. The CCO usually provides a projector upon request. The driver is responsible for knowing which documents to have opened before each lesson begins, know the location of the documents on the *Healthcare Training and Knowledge Resources (HTKR)* website, and how to navigate NGD. The driver also operates the software for the call listening activities.

The driver can also record the time it takes to deliver each lesson. TQC, the CCO, and CMS compare this time to the expected delivery time as shown on the curriculum road map. The driver records the facilitator during each lesson and any decisions that take place during the T3, such as shifting the roadmap if the class gets off schedule.

The driver is responsible for printing attendance sign-in sheets prior to the training. One sign-in sheet that includes the month, day, and year must be made for and distributed for each day of the training (Refer to Appendix A).

Activities That Take Place Prior to a T3

Complete the following activities prior to a T3. Go to Appendix B for a T3 preparation checklist.

Training Delivery SOPs

The TQC T3 team and product development team are familiar with the SOPs that CCO trainers follow for the training and delivery of T3 lessons. Having knowledge about the procedures they follow prepares the T3 team for the types of questions that may arise during a T3. These SOPs are located on the *HTKR* website at the following path:

CCO Standard Operating Procedures > Training Delivery

Preparation

Prior to leaving for the T3, the T3 team is familiar with the materials. Preparation may involve reading the lessons aloud or silently and presenting the materials to peers the same as during a training class. Time may not exist for all three of these activities to take place. If there is not time, reading the lessons aloud and conducting presentations are the most effective way to prepare. Schedule conference rooms and send calendar appointments to attendees.

If the T3 team finds errors during preparation, the design team works with leadership to decide if the materials should be corrected prior to departing for the T3.

Printing of Materials

The facilitator coordinates the printing and shipping of all materials prior to the T3 upon approval by CMS. A FedEx Office, office supply store, or local print shop close to the CCO can process the print order if it is not ready for printing prior to the T3. Review, update, and finalize all materials at least 2 weeks prior to the T3 to allow for printing and shipping.

Binder Instructions

To prepare the documents:

- Use three-ring binders to present the materials to the T3 participants. Three-inch, D-ring binders hold approximately one week's worth of training materials.
- Print cover pages in color and include the customer service representative (CSR) tier and line of business for the training.
- Prepare documents for printing according to the following instructions:
    - Print the document and verify all instructor pages are on the left side and no other formatting has moved.
    - Include the curriculum road map at the beginning of the first binder.
    - Save documents to a Zip file in a logical numerical order. Save documents as a PDF with the exception of Microsoft PowerPoint presentations. With Microsoft PowerPoint, if you want three slides to a page with lines to the right of the slide, save it as a handout before you take it to the FedEx Office. If you do not save it as a handout, the FedEx Office can print the Microsoft PowerPoint as three slides to a page, but there will not be any lines for taking notes. Explain in writing that you want the Microsoft PowerPoint printed this way.
    - Save the documents to a flash drive or compact disc (CD) to transport to a FedEx Office store.
    - Spot-check the binders after they are printed.
    - Always print double-sided, in black and white ink on white paper unless instructed otherwise.
    - Use a three-hole punch on pages that go in the binder.
    - Staple reviews and handouts with multiple pages.
  - Do not insert reviews or review keys into binders. The facilitator hands these out separately during the T3.
  - Proofread the document at the print store before performing the full print.
  - Ask FedEx Office to insert the materials into the binders.
- Pack binders into boxes. The administration support or members of the TQC T3 team can do this.
- Before shipping:

- It is always better to ship to the hotel or a nearby FedEx Office location than the CCO. CCO sites are usually very large, and it is easy to misplace the binders there. Check with the CCO and/or CMS to know their preference for your specific T3.
- It is important to consider the hours of the business receiving the shipment. If you have the materials sent to the hotel, you can be pick them up at any time. If you have the materials sent to a FedEx Office, look for a 24-hour location.

Pre-T3 Training Leadership Meeting and E-Mail

Two to three weeks prior to the T3, send an e-mail to the CCO training leads that includes questions requiring answers prior to the T3. Prior to sending, discuss this e-mail in the Training Leadership Update meeting with CCO, CMS, and TQC. Include the start and end time of each day, the number and names of participants, and the POC at the CCO site where the T3 is taking place in the e-mail. The T3 team will also provide the CCO with the names of the T3 team and any other TQC attendees prior to the T3. Once the e-mail is sent or you receive responses, acknowledge that this activity took place by the TQC Training Team manager. Next schedule time during the Training Leadership Update meeting to discuss necessary details outside of individual calls between the TQC facilitator and the CCO lead.

Equipment Setup

The CCO typically provides the equipment resources; however, verify this in the e-mail sent to the CCO POC prior to the T3. The T3 team usually provides and mails speakers prior to the training unless indicated by the CCO or the CMS. Refer to Appendix B for packing tasks.

Working With the Learning Central Team

A week prior to the T3, load all reviews, review keys, and practice assessments into Learning Central (LC), including the midterm and final review. All T3 participants take the exam in LC. Test the reviews for completeness, accuracy, and function. When a LC user ID is not working, the test can be taken on paper as long as the CSR agrees to insert the same answers in LC when the account is functioning. When you identify a problem with access, contact the LC team.

Curriculums are loaded into LC on a case-by-case basis. Decisions for each case are determined after a discussion with CMS and TQC leadership.

Load the curriculum into LC when training Senture or another CCO sub-contractor that is certified as a spike site. The CCO needs this information to verify that the participants took the lesson as a new CSR would.

Organizing Activities and Handouts

Some curricula include activities that involve advanced preparation on the part of the instructor. These activities may involve handouts or items that you need laminated. If the materials are ready prior to your departure, make enough copies of each handout or activity before leaving. It is helpful to place each handout in a folder titled with the day, number, and title of the matching lesson. If an activity requires laminated cards, it is helpful to organize them in Ziploc bags with white adhesive labels.

You can leave the extra supplies with the CCO if only one T3 is taking place for that curriculum.

Be sure the T3 team understands the activity prior to the T3. It may be beneficial to practice conducting the activity prior to the T3.

Creating an Instructor Resource List

The Instructor Resource List is a list of health insurance claim numbers (HICN) and calls used by the T3 facilitator and eventually the CCO instructor during class. The TQC instructional designer or SME who wrote the lesson provides the HICNs and phone calls. Request this from the team developing the materials as soon as possible. HICNs on the Instructor Resource List also reference the corresponding lessons. Type the HICNs and calls into the Instructor Resource List.

IDs, SMEs, and T3 team members, share the responsibility for verifying that the HICNs are loaded in the NGD Training environment and that the HICNs work for that lesson prior to and during the T3.

When the Instructor Resource List is complete, a member of the TQC Content Team loads it into Reference Materials in the NGD Training environment with the ability to upload files into NGD. It can then be accessed for the T3 and accessed by the CCO after the T3.

Hot Seat Activities

Hot seat activities are live, role-playing situations where the trainer asks a classroom volunteer to come to the front of the room and play the role of a CSR while the trainer plays the role of a caller. The T3 team practices the activity prior to the T3. Create hot seat activities for the same time as the lesson they reference. If a there is no hot seat activity created at the time the lesson is created, it must be created several weeks in advance of the T3. It is crucial that the hot seat activities are written:

- With a HICN that is located in the NGD Training environment.
- For the CSR tier and line of business related to the training.

Activities During the T3

Complete the following activities during a T3.

CMS Attendance

CMS representatives may attend the T3. Prepare a binder for their use while at the T3. Allow CMS time to ask questions or make comments during the training.

Arrival on First Day

Arrive at the CCO the day before the training, whenever possible. This allows time to go to the CCO, practice accessing the systems, organize the room, and become acquainted with the training room, building, and the CCO POC. The T3 team may also post materials in the room and set out name placards prior to attendees arriving.

Daily Tasks

- Search the room and each attendee’s desk area for misplaced protected health information (PHI).
- Verify all materials are printed, prepared, and ready for the next day of training at the end of each day. Leave the training room after verification or stay and prepare as needed.

Always search the room for PHI at the end of each day.

Attire

Remember that you are representing the entire TQC team and CMS, and put your best foot forward in business or business casual attire. Do not wear denim. Wear comfortable shoes; however, be advised that the CCO has rules against shoes that have straps between the toes, such as flip-flop style sandals.

Class Schedule

Historically, CCO T3 pilots have been conducted as if the participants are CSRs and not trainers. This means that class begins at 8 a.m. and runs until 4:30 p.m. Schedule a 15-minute break around 10 a.m. and 2 p.m. A 30-minute lunch usually occurs around noon. The schedule of the breaks can be flexible around course curriculum, but is close to these timeframes. Per CCO request, the classroom hours follow what has been stated above and not much deviation is to occur. The T3 team arrives at 7 a.m. each day to arrange the training room, prepare for the day, and make sure all systems are operating.

Comment Spreadsheet

During a T3 pilot, collect feedback about the lessons from T3 participants. This information is written down on index cards, which can be color coded, and handed over to the individual recording the comments from each lesson. Have the participants write the day, lesson number and page number on the card. The recorder types the comments from the participants into the comment spreadsheet. The comments include the day, lesson number, title of product, type of product, and page number. Comments must be as detailed as possible so that a person that was not in the class can interpret the request and update the document as needed. Questions and comments are discussed during the T3 debrief, per request from CMS. This allows for further clarity of the request or comment.

The cards or sheets on which the comments were originally written must be kept for approximately 2 – 6 months after the T3, until the updates are made to the materials. It may be necessary to verify the original comment.

E-mail the comment spreadsheet to CMS and the TQC team. The schedule for when to send the comments to CMS and the TQC team will be determined prior to the T3.

Not all comments drive changes to the materials, but all comments must be evaluated to determine required changes with a priority of high, medium, or low.

The SME records the comments, unless he or she is facilitating. At that time, the other facilitator types the comments in the spreadsheet.

Debrief Calls

During the pilot, debrief calls are scheduled and led by TQC from 4 p.m. to 4:30 p.m. ET. The Microsoft Outlook e-mail invitation includes the CMS, CCO training leads, TQC training leads, the T3 facilitation team, and TQC training instructional designers who worked on product development. Send the invitation for debriefs 1- 2 weeks prior to the T3.

Debrief agenda example:

- Attendance:
  - CMS
  - CCO
  - TQC
  - Those in the room
- Review each lesson:
  - Announce the proposed timeframe and actual timeframe. Provide any needed explanation for significant variances in the timeframe. A “significant variance” is a difference of 20 minutes or more. Examples include: More time was needed for

discussion; material was easier to get through than anticipated or more difficult to get through than anticipated.
    - Allow each T3 participant to speak or designate a spokesperson to speak about each lesson.
    - Ensure that comments during the debrief call are consistent with comments turned in on the comment spreadsheet during class.
- Ask for showstoppers. Showstoppers are items that could stop the progress or operation of the training curriculum.
- Adjourn the debriefing.

A non-pilot T3, such as the Senture spike site in London, Kentucky, does not require a debrief call because it does not involve a pilot. Record and load comments to the T3 folder.

Surveys

Prior to the T3, develop a survey to evaluate the materials, facilitators, and the course. The training leads have a set of these surveys specifically developed in Survey Monkey for T3s. You must send surveys at the end of each day to T3 participants. A training lead compiles and sends survey results to CMS and discuss in meetings as necessary.

Sign-In Sheets

Distribute an attendee sign-in sheet for each day of the training.

First Day of T3

- Start with introductions and icebreaker exercises.
- Define expectations and ground rules.
    - Class members are expected to participate and ask questions.
    - No food is allowed in the classroom with the exception of hard candy.
    - Drinks are permitted if the containers have a lid.
- Explain how participants submit comments during the T3.
- Collect learning management system (LMS) IDs to send to the LMS team.

Review Days

If the roadmap allows time for a self-paced review, request that the class use the time for review. If the class waives the time for review, discuss this with the CCO POC. If the class waives their time for review and performs poorly on the test, it could reflect badly on TQC.

Do not publicize the fact that it could reflect badly on TQC during the T3.

If the roadmap involves an instructor-led review, prepare a review before class that day. The review cannot involve asking the class the questions on the review, but can involve asking the class questions about information covered in class that appears on the review.

If it is discovered that a question on the review does not have a viable answer or has more than one correct answer, follow the guidelines in SOP *TR 27.0 Assessment Reviews*.

Instruct the class to take the review in LC; however, have a few paper copies ready in case a participant's LC access has not been established correctly. This applies especially to Senture where the LC ID numbers are new to them.

Do not allow anyone to take the final or paper review out of the classroom.

After the review is completed, have the participants show you their scores. Write the scores down on one of the sample tables shown below. After all participants complete the review, contact the LC team and ask them to run a grade report to e-mail to CMS. A report analyzing the missed questions is not needed at this point. E-mail the results to the training team leads and CMS.

The class must achieve a 95 percent grade average for the T3 to be successful and meet the TQC Statement of Work standard.

Review Scores Sample Tables

Table 1: Review Scores (3 Reviews)			
Participant Name	**Review 1**	**Review 2**	**Final Review**

Table 2: Review Scores		
Participant Name	**Midterm Review**	**Final Review**

Departure on the Last Day

- Clean room and remove TQC belongings.
- Pick up any remaining trash.
- Do one last search for misplaced PHI.
- Pack the box of supplies and extra binders to ship back to office. Try to avoid having the shipping store pack the box because a FedEx Office charges $11 - $15 to insert items into a box.

Meals During the T3

It is highly recommended that TQC T3 team members pack a lunch to take to the CCO each day due to the 30-minute lunch timeframe. CCO sites tend to be remotely located, and driving for fast food may take several minutes. Some CCO locations have onsite catering, and at times, the CCO may order lunch for the CCO trainers. TQC members are allowed to purchase from the on-site vendor and may be included in the CCO order. TQC members must reimburse the CCO for their order.

The CCO sites have microwaves, refrigerators, and some vending machines.

Be advised that, in the past, the CCO have been directed not to fraternize with TQC. TQC has no rules pertaining to this, but it is important to follow the CCO T3 lead's direction if class members want to join TQC for lunch.

Preparation Time at the T3

As needed, the T3 team may need to prepare in the evening prior to the next day's training. This can be done in a restaurant, hotel lobby, hotel room, or at the CCO. It is up to the discretion of the T3 team. Be discrete when talking about the training while in a restaurant or at the CCO. Do not discuss anything confidential. It is possible the CCO staff will be in the same area.

Training Document Gathering

Reach out to the Training Development Project Manager and/or Training Leadership to obtain related training documentation including:

- E-mails verifying the details/parameters of the T3
- E-mails sent to CMS about the final assessment scores and final daily survey results
- Other e-mails as necessary
- Project list of all needed documents for the T3
- Timeframes as written down by driver at the end of each lesson

- Comment spreadsheet (daily if possible)
- Debrief meeting agenda and notes
- POC information
- LC reports
- Other notes and pertinent items as needed

Breaks

Start and end class and breaks on time. The CCO is allowed a 30-minute break for lunch and a total of 30 minutes of breaks during the day. Split these breaks into two 15-minute sessions, three 10-minute breaks, or other combinations. Do not end the day early.

Parking Lot Questions

When participants ask questions during class, the facilitator, SME or driver try to answer the question at that time. If the question cannot be answered at that time, the recorder of comments at that time sends an e-mail to other SMEs in an attempt to locate an answer. After the answer is determined, inform the class of the answer at the appropriate time.

Flip Charts

When possible, prepare the flip charts for the next day before leaving for the day.

Phone Calls

Phone calls are calls taken by CCO CSRs and recorded for playback purposes. When the calls are played, you can see the work done in NGD and hear the words spoken by the CSR and the caller. If a webinar is being conducted to include CMS or other persons, the webinar must be turned off during NGD screens or phone calls to protect PHI.

Obtaining Calls Prior to T3

You may incorporate calls into the lesson with a specific ID number already listed in the lesson. You must verify all calls prior to the T3 by the T3 team and the development team. Sometimes the calls may still need to be located. In this case, place a request with the TQC Quality team as soon as possible. Explain the CSR line of business and tier level you are teaching. Then provide any other parameters specifically needed. For example, if you are looking for calls specific to a suspended claim for a Tier II Part B Claims CSR.

Be careful when determining whether to use a call. It is common for Tier II CSRs to receive and handle calls that could be handled by a Tier I CSR in the same line of business. The CCO does not want to play calls that could be handled by a Tier I CSR in a Tier II CSR class. When choosing calls, use examples that show CSRs correctly handling the call. If you are unsure that a call is appropriate, test it during the T3 pilot.

Prior to attending the T3, verify that all sites will be operating during the pilot. For example, if work is being done on the Coralville, Iowa server, it may not be possible to listen to calls from that site during the training. If this is the case, record all calls for that site to a password-protected CD before leaving for the T3. Speak with the TQC Security and TQC Quality teams to get this completed. You must encrypt the calls due to PHI.

It could take a while to download phone calls, so allow a few days for five phone calls and a week or more for more than five phone calls. It is preferable to do these 2 - 4 weeks prior to the T3.

Playing Calls During the T3

During the T3, play the calls when instructed in the training materials. If you have extra calls, you can play these as time allows or at the end of the day. It is also possible to play calls during the On-the-Floor Learning Activity time. On-the-Floor Learning Activity time is used when the CCO roles out the training to the CSRs. Typically during the T3, the trainers do not actually sit with CSRs.

When preparing for the T3 and debriefing calls during the T3, review the following points:

- What was the main reason for the call?
- What probing questions were used by the CSR?
- What scripts did the CSR use?
- Was the call handled well?
- What would you have done differently?

During the T3 pilot, ask the CCO trainers in attendance if they would like to use that call in the class. If they do not want the call for the class delete it from the Instructor Resource List.

Class Attendance

Each participant needs to be in the class every day of the T3 for all lessons and reviews. If you learn that one or more participants will miss part or all of a lesson, e-mail the TQC Training Leads distribution list asking for guidance. The TQC Training manager notifies CMS of the situation. At this time TQC, CMS, and the CCO will discuss the appropriate action, which could involve allowing the participant to either make up the reviews or not return to complete the T3.

Appendix A

Name (printed)	Signature	Date

Appendix B

Action	Notes	Need By
Administrative: Need to know how many attendees from CCO		
Administrative: Practice presentation		
E-mail: Send CCO the names of TQC attendees and schedule		
E-mail: Tell CCO what we need- markers, conference line, etc.		
Materials: Order binders and index cards		
Materials: ensure activities, handouts and Instructor Resource Lists are printed and available. Ensure systems are available.		
Materials: Print and assemble binders		
Materials: Ask team if there were many CMS/CCO issues during development		
LMS: Upload materials and assessments to *HTKR*.		
Shipping: Create boxes, CDs, and ship: Shipping to hotel or CCO- Wed/Thursday to make cheaper		
Shipping: materials, nameplates, laser pen,		
Leadership: Demo for leadership		
Survey: Set up survey with Cindy O'Brien		
Debrief: Need debrief agenda		
Debrief: Set expectations for debrief- does CMS need to be a part of it, which days or all for the debrief		
Debrief: Compile debrief call invites and team invites for feedback prioritization		
After T3: Set up tasks to prioritize and determine course of action for feedback		

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Implementation and Sign-Off			
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