MIS EBT Implementation Project
Training Plan

Prepared by:

Project #:

Submitted to:

Date submitted

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Commonwealth of PA-Department of Health   Bureau of WIC

Document History

<The document history is a log of changes that are made to the document, who made the changes, and when. For example, the initial creation of the document may contain the following: Version 0.1, Date 1/1/2004, Author Charlie Brown, Status Initial creation. Subsequent updates to the document will be Version 0.2, 0.3, etc. The first published version of the document should be Version 1.0.>

Table: Document History Table

Version	Date	Author	Status	Revision Descriptions
0.1	06/12/15	DOH	Initial Draft	Draft plan to present approach to potential bidders
1.0	Mm/dd/yy		First Published	

Approvals

<In lieu of this Approval section, which requires multiple signatures on one document, you may elect to use the Approval Memo template. Distribute both the Training Plan and the Approval Memo, requesting that only the memo be printed, signed and returned to indicate approval.>

Your signature below indicates that this document meets its objectives and is acceptable.

Signature		Signature
Name		Name
Title		Title
Date		Date

Signature		Signature
Name		Name
Title		Title
Date		Date

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1   Purpose of This Document

This Training Plan describes the overall training scope and strategy, training requirements, proposed training sessions, required training materials and facilities. The plan is developed during the Planning Phase. The Project Manager is responsible for developing and distributing the Training Plan to all team members, project sponsors and to the supervisors of the target training audience.

2   Acronyms

<Provide all acronyms that may be used within this document.>

Table: Acronyms Used in This Document

Acronym	Definition
PMM	*Project Management Methodology (example)*

3   Executive Summary

<In this section, provide a brief one-page summary describing the purpose, methods, issues, and results of the Training Plan. This section should be completed last and should capture the key points described in the detailed section of this document.>

[Enter the Executive Summary text here]

4   Introduction

4.1   Scope

<Describe the project and/or organizational boundaries of the training, such as initial training for system users, remedial training for the system maintenance staff, etc.>>

[Enter text here.]

4.2   Background

<Provide a general description of the system, and an overview of the training curriculum.>

[Enter text here.]

5   Training Requirements

In order to successfully transition from the current QuickWIC system to the new MIS, significant training efforts shall be required for multiple audiences. There are approximately 900 users of the current MIS and some form of training will be required for all users. In addition, training shall be required for participants as it relates to any new process/interaction a participant may have related to the MIS. Participant training shall be either video and/or written media. DOH does not anticipate any face-to-face training between the Contractor and the WIC participants. EBT training for DOH, local agency personnel, authorized WIC retailers, PA Treasury, and Comptroller shall be done in coordination with the MIS training.

This training plan encompasses training to be provided both for the MIS and EBT functionalities and will be provided by both the MIS and EBT Training Specialists. The MIS vendor will be responsible for refining and expanding upon the information regarding MIS training during the project planning and execution phases. The EBT vendor will be responsible for refining and expanding upon the information regarding EBT training during the project planning and execution phases.

5.1   MIS Training

The training will be training on how the transferred MPSC system works including clinic operations and interaction with the EBT system. Training audience will include all local agency and clinic staff, Bureau of Informatics and Information Technology (BIIT) staff, User Acceptance Testing Team, and WIC Program Office staff.

5.2   EBT Training

The training will be training on the EBT system (including but not limited to file transfer, reconciliation file details, report/data retrieval and problem resolution), not the retailer's point of sale (POS) specific training. Training audience will include WIC Authorized Retailers, local agency and clinic staff, BIIT staff, comptroller and treasury staff, User Acceptance Testing Team, and WIC Program Office staff.

5.3   Roles and Responsibilities

Role	Responsibilities

Role	Responsibilities
EBT Retailer Team Lead	• Develop and refine EBT Training Plan • Supervise EBT Retailer Training Specialist(s) • Coordinate EBT Training Plan execution • Collaborate with MIS Implementation Team Lead to ensure seamless training experience • Compile Training Evaluation Survey responses • Act as escalation point with any issues
EBT Retailer Training Specialist(s)	• Develop EBT training curriculum • Deliver EBT training curriculum • Update EBT training curriculum based on feedback and training evaluation surveys
Local Agency Staff	• Participate in training as required
MIS Implementation Team Lead	• Develop and refine MIS Training Plan • Supervise MIS Training Specialist(s) • Coordinate MIS Training Plan execution • Collaborate with EBT Retailer Team Lead to ensure seamless training experience • Compile Training Evaluation Survey responses • Act as escalation point with any issues
MIS Training Specialist(s)	• Develop MIS training curriculum • Deliver MIS training curriculum • Update MIS training curriculum based on feedback and training evaluation surveys
WIC Authorized Retailers	• Participate in training as required
WIC Program Office Staff	• Participate in training as required
User Acceptance Testing Team (includes MIS EBT User Workgroup and WIC Program Office staff)	• Review and provide feedback on Training Plan • Review and provide feedback on training materials • Participate in training • Provide subject matter expertise in development of training plan and training materials • Serve as assistants during training sessions to answer user questions and provide guidance to business process and scenario flow

5.4   Training Sessions

<Provide an overview of each individual training session including a brief description of the course, course objectives, duration and course outline.>

Training sessions should be based on user roles and related system functionality. Each user role should have a required training curriculum including both web-based introductory courses and face-to-face instructor led courses.

Training Audience	Session Information
User Acceptance Testing Team	Training will be held at the Health & Welfare building. No more than 30 participants will be included in this training. One five-day session is anticipated.
Pilot Region	Training will be held at an offsite location. DOH anticipates that the location will be centrally located, have facilities to accommodate the maximum number of training participants, and have computer equipment available for use during training. Approximately 40 local agency staff and 30 WIC Program Office staff will be included. Two five-day sessions running concurrently are anticipated.
Region 1	Training will be held at an offsite location. DOH anticipates that the location will be centrally located, have facilities to accommodate the maximum number of training participants, and have computer equipment available for use during training. Approximately 280 local agency staff will be included. Five five-day sessions running concurrently are anticipated.
Region 2	Training will be held at an offsite location. DOH anticipates that the location will be centrally located, have facilities to accommodate the maximum number of training participants, and have computer equipment available for use during training. Approximately 295 local agency staff will be included. Five five-day sessions running concurrently are anticipated.

Training Audience	Session Information
Region 3	Training will be held at an offsite location. DOH anticipates that the location will be centrally located, have facilities to accommodate the maximum number of training participants, and have computer equipment available for use during training. Approximately 210 local agency staff will be included. Five five-day sessions running concurrently are anticipated.

Additional details regarding training sessions - TBD

5.5 Training Evaluation

<The effectiveness of training must continually be evaluated. Describe how training evaluation will be performed. Evaluation tools, forms, etc., should be included. Also describe the revision process with regard to the modification of the course and course materials resulting from the evaluations.>

TBD

6   Training Strategy

6.1 Strategy

Given the scope and complexity of the change to day-to-day Local Agency, Clinic, and PA WIC staff, face to face instructor-led training for all users is required. Train-the trainer is not a viable approach. Instructors should be experienced training curriculum development and delivery experts.

Web-based training should be used as an introduction to and refresher of the new system functionality.

MIS and EBT training specialists must work together and present a seamless training experience focused on the business process and scenario flow.

6.2 Mode of Instruction

Multiple modes of instruction will be utilized. Web-based, self-learning pre-requisite curriculum will be developed based on user roles and functionality.

Just-in-time classroom training will be provided for User Acceptance Testing Team members and each rollout region. Classroom training should include instruction, demonstration of system functionality and hands-on exercises to allow users to demonstrate understanding of training materials.

6.3   Pilot Class

Training materials will be tested during training for User Acceptance Testing (UAT). UAT team members should receive a full and complete training experience to review all training materials, ensure adequate preparation of training specialists, and learn the system fully to perform sufficient and comprehensive UAT.

Training materials will be updated as a result of system changes after UAT and Pilot completion as well as Training Evaluation Survey responses.

6.4   Dependencies/Constraints/Limitations

<Identify all known dependencies constraints, and or limitations that could potentially affect training on the project.>

1. Web-based, self-learning training must be completed by training participants at least two weeks prior to offsite face-to-face training.
2. Scheduled offsite training should be completed within 2-4 weeks of scheduled rollout.
3. Training scenarios should be available for participants to execute in the training environment upon completion of the web-based training through rollout.
4. Training sessions may include actual readiness activities for region rollout (e.g. scheduling appointments or verifying food packages) as part of the classroom instruction.
5. If additional topics are covered and/or if functionality has changed, the Contractor shall also provide an updated web-based training based on the need and/or system changes.

7   Training Materials

<Describes the types of training materials required for the training. The training materials developed may include visuals for overhead projectors, handouts, workbooks, manuals, computerized displays, and demonstrations.

Note: Training manuals or workbooks differ from the user manual. They are tutorial in nature and follow a functional, work flow approach to learning the system with a strong focus on "hands-on" exercises and examples.

During the development of training materials, it is helpful to identify at least one expert in the user community who can assist the trainer by describing the user environment and work flow and answering questions.

The training materials and curriculum should accurately reflect the system. Users should also be introduced to the user manual so they can use it as a learning and reference tool.

An instructor guide should also be developed. The guide is particularly useful after the initial training is completed, since subsequent training may occur at infrequent intervals.>

TBD

7.1 Training Material Revisions

<Once training materials are developed and pilot-tested, they must be subjected to the same kind of configuration management process as the other system documentation. Training materials should remain current with system enhancements. To accomplish this, the training team should be included in distributions of release changes and provided sufficient time to update training materials before the next scheduled user training. Describe the change release process with regard to the training team, and how training materials will be kept updated.>

TBD

8   Training Facilities

8.1 Hardware

<State the hardware specifications for workstations and servers.>

TBD

8.2 Software

<State the software specification for the training environment.>

TBD

8.3 Training Venue

<Specify the locations (s) for the training sessions to be conducted.>

TBD

9   Glossary of Terms

<Include all terms that may not be familiar to the reader.>

Table: Glossary of Terms used in This Document

Term	Definition