Project CRADLE Training Package

Wave 2 Staff Training

Version 1.0

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1. Overview

Purpose of Training Package

This training package provides key information to help staff:

- Prepare for your Project CRADLE Training session.
- Access resources to support your learning of the PointClickCare (PCC) system.
- Identify the homework activities that we require of staff to ensure your home's electronic charting environment is ready for PointClickCare go live.

We have included information and resources in this package to support all staff who will be using the PCC system and have indicated which resources are most helpful for each role. We encourage you to review this information regularly to help you transition to the new electronic charting system with ease.

Common Terminology

ADT – Admission, Discharge, Transfer

CIS – Clinical Information System

CP – Care Plan

eMAR – Electronic Medication Administration Record

interRAI-LTCF – International Resident Assessment Instrument Long-Term Care Facilities

PCC – Point Click Care

POC – Point of Care

UDA – User Defined Assessments

VAT – Violence Assessment Tool

Resident Privacy and Security

The privacy and security of resident data has and will continue to be prioritized as we shift PEI's LTC homes to an electronic charting system. Project CRADLE has undergone a full Privacy Impact Assessment (PIA) that was approved by PEI's Privacy Officer and Health PEI's Chief Administrative Officer. This involved a full review of the operational and clinical protocols to protect resident data, in alignment with the *Health Information Act* (HIA) and the protection of personal health information (PHI).

Your Role as Staff: Use the HIA's *The 'Need to Know'* Principle

Please see the infographic on the next page to understand how to use the '*Need to Know*' Principle.

Privacy and Access Odds & Ends: 'Need to Know' Edition

The 'Circle of Care' is Out...

➢ The *Health Information Act* (HIA) is a piece of legislation on PEI that governs the collection, access, use, and disclosure of personal health information (PHI).

➢ The HIA establishes a 'Need to Know' principle when it comes to collecting, accessing, using, and disclosing PHI.

➢ It is a common misconception that being part of a patient/client/resident's 'Circle of Care' at some point in time means permitted access to that person's information at any time for any reason. This is <u>NOT</u> the case and in fact is <u>NOT PERMITTED</u> by legislation.

➢ We need to transition our Health PEI way of thinking to follow the 'Need to Know' principle, as per the HIA.

Bring On the 'Need to Know'!

➢ The 'Need to Know' means we should always operate by considering the minimum amount of information that will serve the purpose. For example:
   o Only collecting the information that is relevant to the purpose for which you are collecting it.
   o Only accessing the information that is necessary to provide care in that moment.
   o Only disclosing the information that is required or permitted to serve the purpose.

➢ Use professional judgment and do a case-by-case assessment to determine what information is necessary in each scenario. If you are initiating the use or disclosure of PHI, you are responsible for ensuring the appropriate level of PHI is accessed or shared.

➢ Remember, just because the PHI is requested of you, does not always mean that amount of PHI is needed.

Need help deciding if the 'Need to Know' exists? Ask yourself:

✓ Do I need to know this information for the purposes of my role on the client's care team?
✓ What is the trigger or reason for my 'need to know'?
✓ Will I be taking action or making a recommendation or decision as a result of accessing this information?

HUMBOLDT: A LESSON IN THE 'NEED TO KNOW'

➢ Many of us remember hearing or reading about the Humboldt tragedy, when a hockey team from Saskatchewan was involved in a horrific car crash that resulted in numerous serious injuries and fatalities.

➢ Following the crash, the health authority began monitoring access to the electronic health records of the victims, which resulted in the discovery of multiple privacy breaches related to unauthorized accessing of records.

➢ The privacy breaches were appropriately reported to the Information and Privacy Commissioner (IPC) and investigations into the breaches were initiated.

➢ The ensuing investigations determined that the 'Circle of Care' misconception was a major factor in the privacy breaches and the requirement for training in the 'Need to Know' principle was identified.

➢ Ultimately the IPC published multiple investigative reports and made several recommendations, including regular audits of the health care professionals who inappropriately accessed PHI and regular mandatory privacy training.

➢ For more details on these privacy breaches and resulting recommendations, you can search for the reports here.

2. Training Approach

We are using a Train-the-Trainer approach for training staff on the use of PCC. We have identified "Super Users" (internal home experts) who have been trained by the project team and will support all other home staff to navigate the PCC system.

We also recognize that using tablet devices to document resident care may feel unnatural or unfamiliar to staff. To support learning how to use the new tablet devices for the Point-of-Care module in PCC, we have developed a self-paced Tablet Training video and a series of video demonstrations (see IT Literacy Training below).

Super User Training

Super User training has been provided by the Project Team and included a series of virtual training sessions with follow-up homework to support in preparing the PCC system with real home and resident data.

Staff Training

Staff training will be delivered by 3 – 4 Super Users, live and in person, in the weeks leading up to *your* home's go-live date. In these training sessions, your Super User trainers will walk staff through role-specific training topics and workflows while staff follow along on your home's new electronic charting laptops or tablets.

If you aren't sure which date and time you will be participating in Staff Training, please reach out to your home's scheduler.

IT Literacy Training

This training is video-based and consists of online self-paced modules developed by HPEI and provided to each facility. **Please Note:** The IT Literacy training is optional.

You can access the IT Literacy Training videos from your device by opening a browser. You will be taken directly to the home page of the Staff Resource Centre. Type 'PointClickCare' in the search bar.

You may also type the following web address directly in the address bar of your browser if you are not using a Health PEI device.

src.healthpei.ca/pointclickcare

Once you arrive, find the tab titled "Training". You will find a list of training resources, including the "Tech Tips 101 – Training Video" and the "Using the Tablets – Short Video Demonstrations". Please see figure 2 for reference.
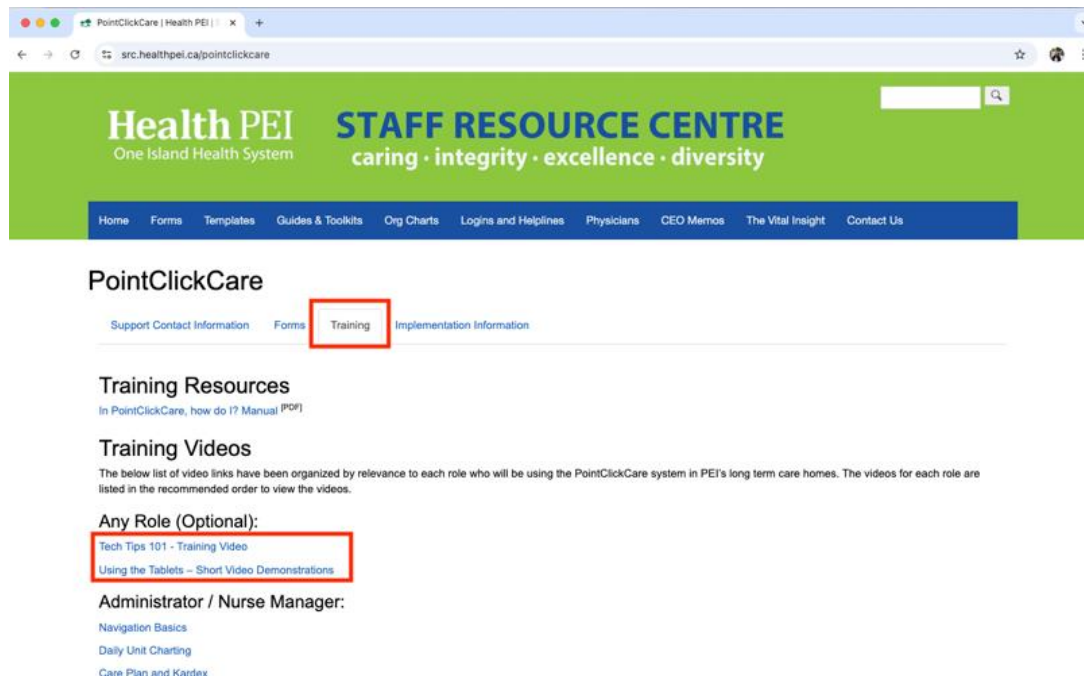
Figure 1 - Staff Resource Centre PointClickCare Training Tab

Staff will be able to access these videos from anywhere and work through them at their own pace. The training has been designed to provide a casual virtual setting to learn about the new handheld technology.

Figure 2 - Sample view of IT Literacy training video

The goals for this training are to:

- Demonstrate the functionality of mobile devices used to access PCC by Resident Care Workers;
- Share technology tips and tricks for using the devices;
- Answer any questions from staff; and,
- Alleviate anxiety with using technology by familiarizing staff with the devices.

An important IT tip for all staff to remember – <u>Always reboot</u> your device at the beginning of your shift to ensure they stay fast and reliable.

Why Reboot?
RCW Tablets are shared across shifts. When users don't log off, multiple sessions stay open, causing **slow performance** — sometimes taking **10–20 minutes to log in!** A reboot clears old sessions and refreshes the system — making your tablet faster and more reliable.

Step-by-Step: Rebooting via the Start Menu (Soft Reboot):

1. Tap the **Start button** (Windows icon) in the bottom-left corner of the screen.
2. Tap the **Power icon**.
3. Select **Restart** from the menu.
4. Log in with your credentials and start your shift!

Remember:

- Rebooting at the start of your shift helps **everyone** work more efficiently.
- If the tablet is **unresponsive**, hold the **Power button for 10 seconds** to force a shutdown, then press again to turn it back on.
- Always **log off** at the end of your shift.

Need Additional Help?

- Contact a Superuser or the Service Desk (3600) for assistance.

3. Training Pre-Work

We have prepared the following list of pre-work activities for all staff who will be trained in PCC, which is to be completed prior to your training session. This is to ensure you have the chance to orient yourself to the PCC system look and feel prior to "playing in the sandbox" during the training session.

A: Login to a Facility Computer

At least one week in advance of your scheduled training program, please attempt to login to a computer located within your facility using the HPEI username and password that was assigned to

you upon your hiring. If you have not been assigned your own computer, please use the main household station computer.

If you have forgotten your username and/or password, please contact the ITSS Services Desk at 902-620-3600 and ask for your password to be reset. If the Service Desk indicates that your account has been disabled due to inactivity, please inform your manager as soon as possible.

B: Access PointClickCare

We have set up what is called Single Sign-On (SSO). This means that once you have logged into the tablet or laptop and to Microsoft Office with your government-provided network credentials, you will be able to access the PCC application without needing to enter your credentials again. This provides a smoother and more secure login experience, and you do not need to remember multiple usernames and passwords. If you encounter any issues with logging in, please contact the designated support team.

PINs have been initially set to *'peltc'* for everyone, and we will ask that you reset your PIN once you have logged into the PCC system. PINs will be needed for those signing off on any documentation within the system.

"Live" access versus "Training"

Inside both the "PCC LIVE" and "PCC TRAINING" folders, you will find the app (or link) to the PCC charting solution, the Point-of-Care (POC) module, and the eMAR module.

PCC LIVE = Used to document care for our residents once a home has implemented and is using PCC.

PCC TRAINING = Used to practice and do testing of PCC, POC and eMAR charting system environments using test data. This training environment will be available for you to use on an ongoing basis and has no expiration date. We want you to be able to play in the training environment whenever you need to.

HOW TO ACCESS POINTCLICKCARE

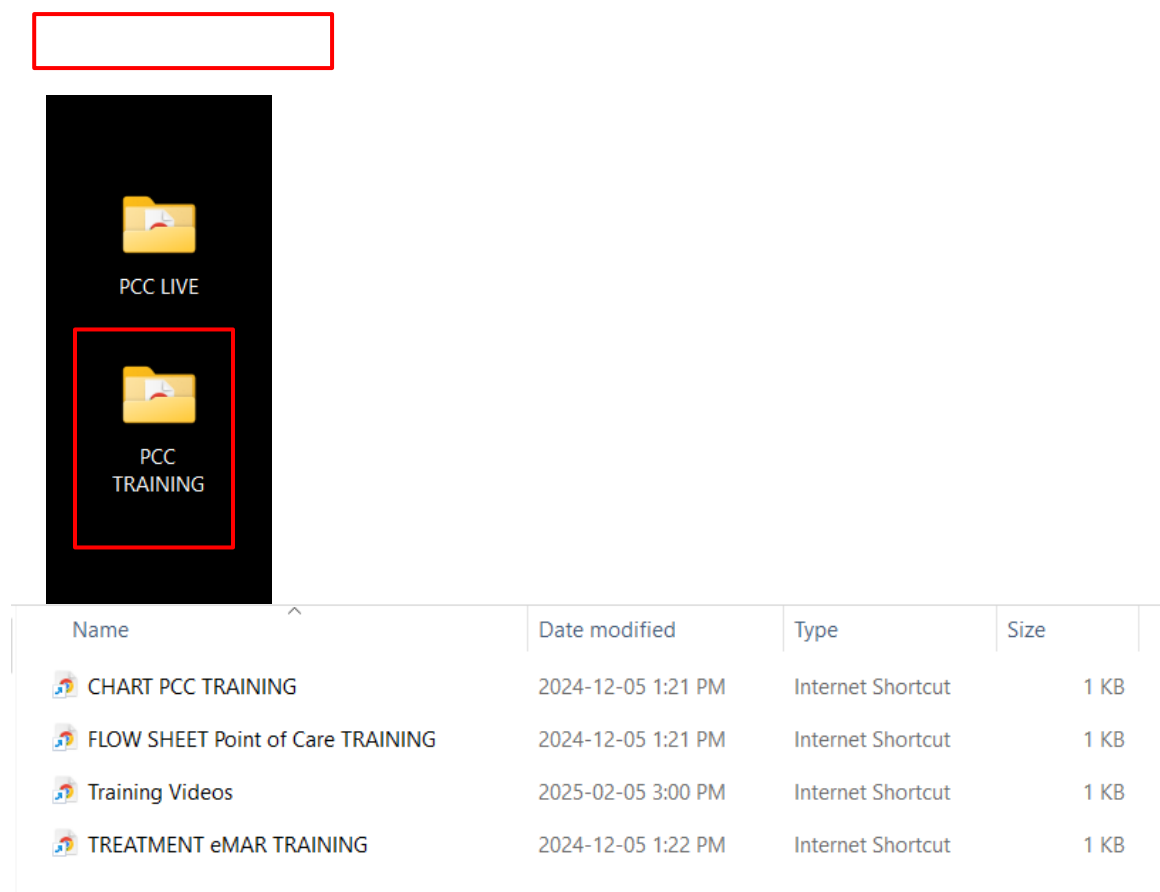**Step 1:** Power on a home laptop or computer. You must be located within the LTC home.

NOTE: If you are relying on WiFi, do not use the laptop in the administrative wing of the home. WiFi coverage does not extend into the administrative corridor. Use the Boardroom or other common areas or find a quiet spot within a Household. If you need to use an administrative office, plug the training laptop into a docking station for wired access.

Step 2: Login to the computer using your network username and password. (Refer to instructions in Section A above if you have difficulty logging into the computer.)

Step 3: Once you are logged in, locate these two folders on the desktop:

Double-click on the "PCC TRAINING" folder.

You will now see this:

Name	Date modified	Type	Size
CHART PCC TRAINING	2024-12-05 1:21 PM	Internet Shortcut	1 KB
FLOW SHEET Point of Care TRAINING	2024-12-05 1:21 PM	Internet Shortcut	1 KB
Training Videos	2025-02-05 3:00 PM	Internet Shortcut	1 KB
TREATMENT eMAR TRAINING	2024-12-05 1:22 PM	Internet Shortcut	1 KB

Double-click on the "CHART PCC TRAINING" shortcut. The Edge web browser will open, and you will be taken to the PointClickCare Home screen, shown below:
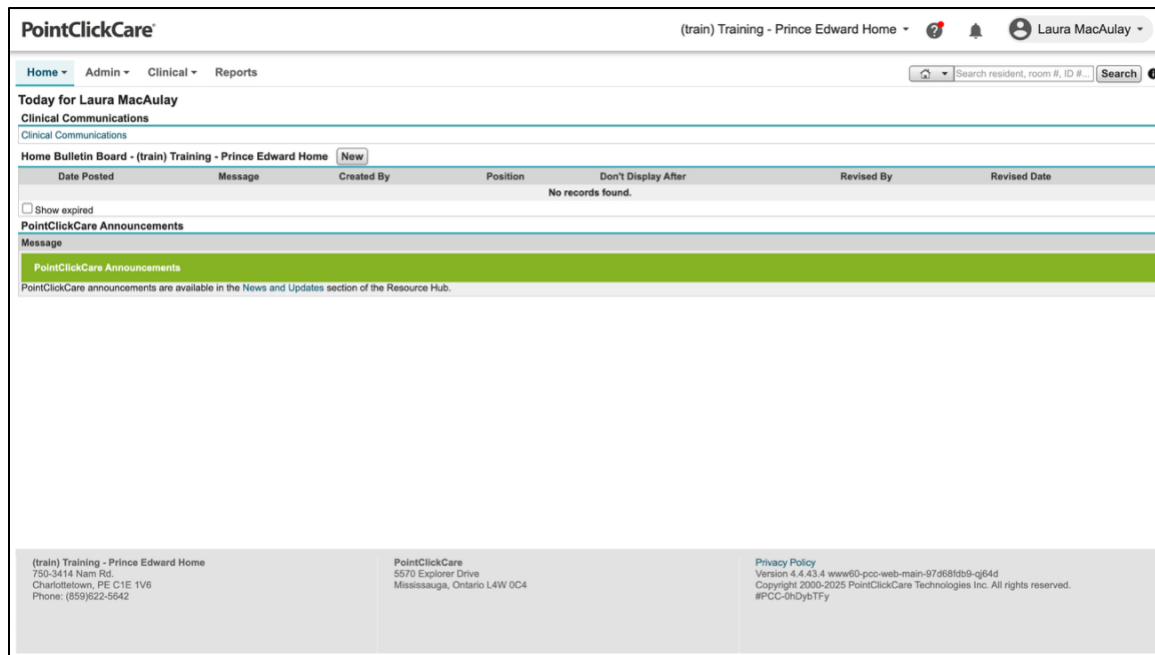
If you made it this far, you have now accessed the PointClickCare charting training environment!

If you are not taken to the screen above and are receiving an error message, please contact your manager and they will coordinate with the project team to have your issue resolved. Please provide your manager with the specific error you are receiving.

C: Complete "PointClickCare – The Basics" eCourse in SmartZone

SmartZone is PCC's online learning system that provides 24/7 access to PCC-related learning content, including eCourses, Virtual Live Events, CEU Courses, and more.

The length of this eCourse is **15-minutes**.

How to access the "PointClickCare – The Basics" course on SmartZone:

1. As in the steps in section B, open the "PCC LIVE" folder on any HPEI computer or tablet and select the icon that is titled "**PCC LIVE**".
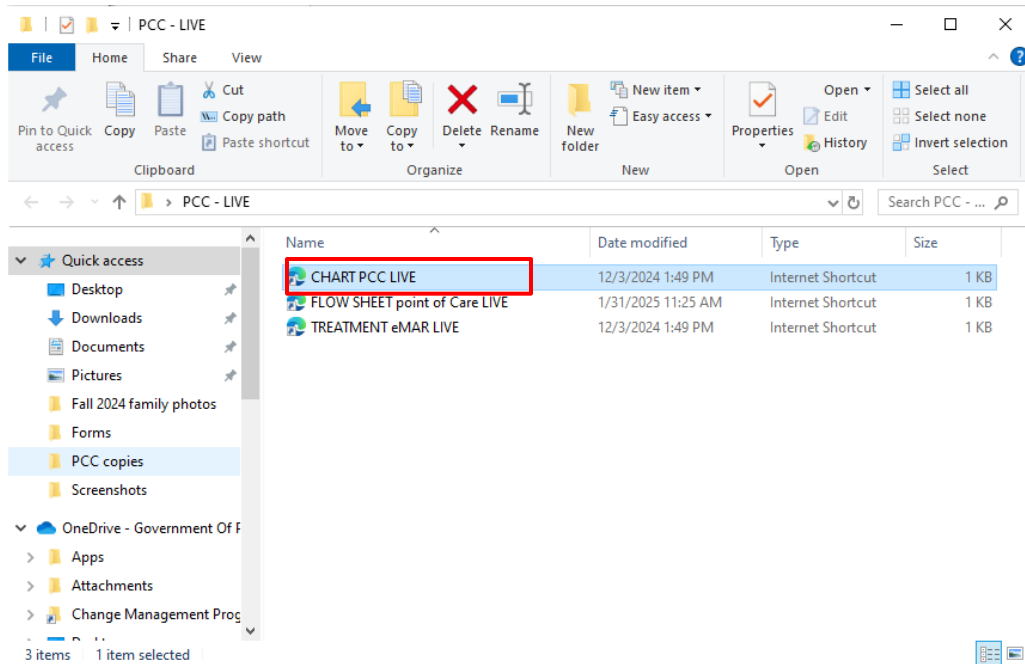
This will open the Home Page in the PCC live system.

2. On the left side of your screen, hover your cursor over **Home,** select **SmartZone with SSO**.
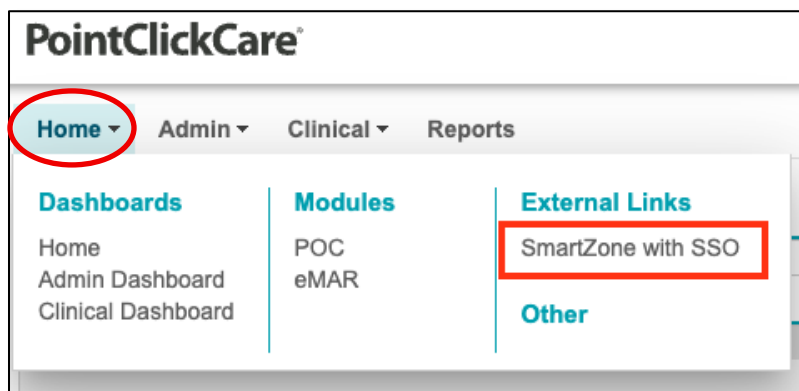
You'll be taken to the PCC SmartZone, provided by Relias. When you access SmartZone for the very first time, you will be presented with a new user registration page. Please enter your information, including creating a new password (which you won't need going forward) and submit the form.

3. Once you're in SmartZone, select the **Course Library** on the left of your screen.

4. Search for "**PointClickCare: The Basics**" in the search bar near the top right.
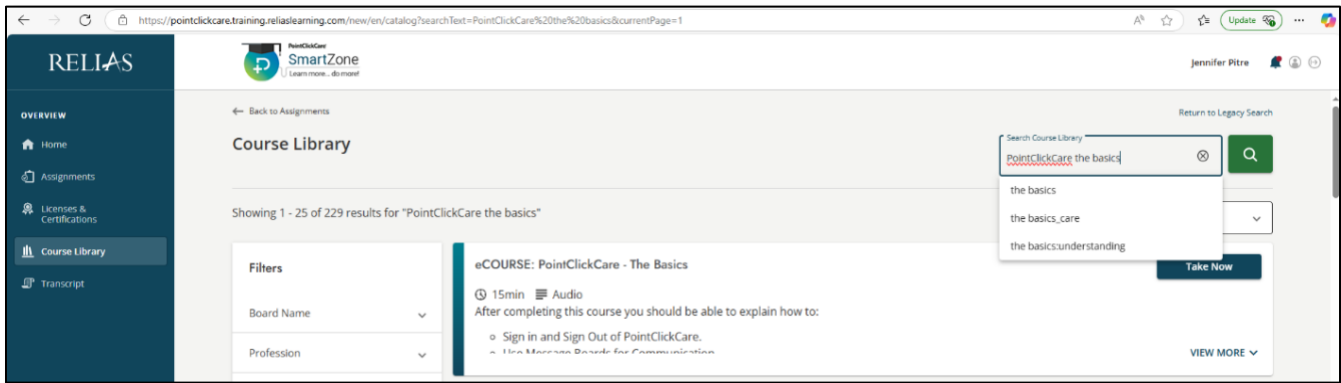
5. <u>Click on the "**Take Now**" button on the right.</u>

Please Note: Once you have viewed this course, please ensure that you return to accessing the "PCC Training" charting environment for practice prior to your home's go-live date. The "PCC live" charting environment includes your home's real resident data.

D: Join the Town Hall Presentation

The Health PEI Project team will be hosting a Town Hall meeting the week before the training sessions begin to prepare all staff for what to expect in training and how to prepare for the Project CRADLE go-live at your home.

Your pre-work: Join the Town Hall meeting!

We understand that this may not be possible for all staff at once, so if you are not able to join the live Town Hall meeting, please watch the recording.

The Town Hall recording is found on the PointClickCare page of the Staff Resource Centre. You can access this by visiting www.src.healthpei.ca/pointclickcare or use the direct link found in the PCC Training folder on your laptop.

4. Training & Location Details

The following outlines the training and location details for each role.

Training Schedule

Each staff person is required to attend at least one PointClickCare mandatory training session. Each homes' respective scheduler will book staff into available training space on one of the following dates. If you are not sure when your training date is, please speak to your home's scheduler.

Training Group	Day(s)	Locations	Time
RCWs	Sept 29 Oct 1, 2, 3, 6, 7, 8, 9, 10, 14, 15, 16, 17, 20, 21, 22	MSEH / CHO Classroom Riverview Manor Boardroom	0800-1600
	Oct 10, 17	Maplewood Manor Boardroom Colville Manor Boardroom	
LPNs	Sept 29 Oct 2, 6, 9, 16, 20	Stewart Memorial Home Boardroom Colville Manor Boardroom	0800-1600
RNs & Nurse Managers	Oct 1, 7, 8, 14, 15, 21, 22	Stewart Memorial Home Boardroom Colville Manor	0800-1600
PT, OT, SW	Oct 16	Virtual	1300-1600
Nutrition & Dietetics team	Oct 16	Virtual	0800-1200
Administrators, DONs	Oct 1	Virtual	0900-1200
Finance Clerks*	Oct 17 & Nov 3	Virtual	0900-1100
Nurse Clerks	Oct 3	Colville Manor	1300-1500
	Oct 10	Stewart Memorial Home Boardroom	
Recreation	Oct 3	Colville Manor	0800-1200
	Oct 10	Stewart Memorial Home Boardroom	
Nurse Practitioner/MD	Oct 21	Virtual	0900-1200
Pharmacists	Oct 21	Virtual	1300-1600

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Training Location Details

Training Location	Parking Lot	Door Code	Directions
Maplewood Manor	Staff Parking (back of building)	5669#	Once you enter the staff entrance, walk to the end of the hall and turn right to the boardroom.
Margaret Stewart Ellis Home	Visitor Parking Lot (also CHO parking lot)	NA	Go into the front door of the Community Hospital. Proceed past Ambulatory Care to the Classroom.
Stewart Memorial	Back Parking Lot (staff)	0725	Take hallway to the right. Turn left at the end and the boardroom is the first door on the right.
	Front Parking Lot (public)	NA	Take hallway to the left. Go to the third door on the left after the fire door.
Riverview Manor	Side parking lot	1920#	Use the staff door on the side of the building, closest to parking area. If spots are full on the side, use the front parking lot.
Colville Manor	Visitor parking area by the front door	NA	Once you enter, walk left down the hallway to find the boardroom.

Training Topics By Role

The below figure outlines the topics that will be covered within each training group. Time spent within each topic will vary based on the training group.

	Training Kick-Off*	Navigation Basics	Admissions and Transfers	Trust Account Mgmt	Assessments	Care Plan / Kardex / Tasks	Orders	Daily Unit Charting: PCC / POC / eMAR	Scheduling Resident Events	Reporting & Reviewing Past Documentation	Workflows
Administrator, DON	Attend Town Hall OR Watch video	√	√	√		√		√		√	
RN & Nurse Managers	Attend Town Hall OR Watch video	√	√		√	√	√	√	√	√	√
LPN	Attend Town Hall OR Watch video	√			√	√	√	√	√	√	√
OT, PT, SW	Attend Town Hall OR Watch video	√			√	√		√	√		√
Rehab Assistants	Attend Town Hall OR Watch video	√			√	√		√	√		√
Nutrition Services / Dietetics	Attend Town Hall OR Watch video	√			√	√	√	√	√	√	√
RCWs	Attend Town Hall OR Watch video	√			√			√	√	√	√
Recreation	Attend Town Hall OR Watch video	√			√	√		√	√		√
Finance & Admin Clerks**	Attend Town Hall OR Watch video	√		√						√	
Nurse Clerks	Attend Town Hall OR Watch video	√	√						√	√	√
NP/MD	Attend Town Hall OR Watch video	√						√		√	
LTC Pharmacists	Attend Town Hall OR Watch video	√				√	√	√		√	

Figure –

Training Topics by Training Group

**The finance clerks will receive two training sessions: Initial training will occur approximately 2-weeks before go-live with a second session scheduled just prior to go-live to enter live resident financial data.*

Additional Notes:

5. Homework

Leading up to training, your home's Super Users have been working diligently to migrate resident information onto the PCC system. They have also worked with staff to ensure initial resident Care Plans have been developed and documented in PCC.

Electronic charting will go-live in your various homes between November 4th and 13th. To support a smooth transition to electronic charting and ensure resident safety, we need all staff to assist in validating the resident data in the LIVE PCC environment.

If you see any missing or incorrect data, if it's within your scope to do so, please add or correct the information. If you need help with the correction, ask a Super User or a staff member who has the scope to make the correction. It will take a collaborative effort to ensure we are ready for go-live!

Topic	Homework	Completed by:
Point of Care (POC) Tasks	Verify that all tasks listed for each resident is accurate. These tasks will be pushed to POC to be documented on upon go-live. For example, verify that restraint instructions, re-positioning schedules, and toileting schedules are accurate (i.e., if a resident has a pen release or uses 4 bed rails, they need to have a restraint schedule). Where to find this list of Tasks: Resident Chart > "Tasks" tab.	RCW
Care Plans	Verify that each resident's Kardex includes relevant and personalized information to give a good snapshot of the resident's care needs. If a resident's Kardex requires updates, please communicate with an RN so that they can make any necessary changes. <u>Where to find the Kardex:</u> Resident Chart > "Care Plan" tab > [in top right corner] Click on "Kardex". You can also find the Kardex from POC once you navigate to a Resident's Chart.	All clinical staff

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Topic	Homework	Completed by:
	Review each resident's Care Plan and ensure it is accurate and up to date. If a resident's Care Plan requires updates, please communicate with an RN so that they can make necessary changes. This will need to be done until the go-live date, following which your care planning will be fully transitioned to PCC. Where to find a resident Care Plan: Resident Chart > "Care Plan" tab > "Edit".	OT, PT, RD, Recreation
Assessments	Ensure all necessary Assessments for each resident are scheduled. Where to find a resident Assessment list / schedule: Resident Chart > "Assmnts" tab. Assessments to look for include: TLR Assessment, Braden Scale, Footcare Assessment (advanced foot care only)	RN
Orders	Ensure that all resident goals of care, diet, and treatment orders that require administration are entered into PCC. Where to find a resident Order list: Resident Chart > "Order" tab.	RN, LPN
Community Calendar	Verify that the home's Community Calendar is up to date. Where to find the Community Calendar: Clinical View > [Under Care Management] "Calendar".	Recreation
Resident Calendar	Verify that all resident calendars are up to date with all appointments and reminders. Note: Please ensure all information that pertains to resident appointments and reminders that are currently in the unit's day planner or other calendar is put into the resident's online calendar.	All Clinical Staff