New York Health Benefit Exchange

Blueprint Summary for
9.4.11 Training Plan
October 26 2012

Item Number	Topic
9.4.11	Training Plan

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Version Number	Modified By	Revision Date	Description of Change
1.1	John Moran	10/19/2012	Updates as requested by CCIIO from CMS Design Review on 10/9/2012 and 10/10/2012
1.2	John Moran	10/23/2012	Updated to include comments within the CMS Training Plan template

<Project Name / Acronym>

Training Plan

Version 2.0

MM/DD/YYYY

Document Number: <document's configuration item control number>

Contact Number: <current contract number of company maintaining document>

Table of Contents

List of Figures

No table of figures entries found.

List of Tables

1. Introduction

Instructions: Provide full identifying information for the automated system, application, or situation for which the Training Plan applies, including as applicable, identifications number(s), title(s)/name(s), abbreviation(s)/acronym(s), part number(s), version number(s), and release number(s). Summarize the purpose of the document, the scope of activities that resulted in its development, the intended audience for the document, and expected evolution of the document. Also describe any security or privacy considerations associated with use of the Training Plan.

Review Element: Training Plan section in the PMP or Training Plan Supplement.

CSC Response:

As noted in the CMS Design Review presentation that was conducted October 9-10, 2012, CSC is scheduled to start documenting and creating the Training Plan beginning December 2012, as shown below.

CSC's NY-HX proposal (response to the Procurement Opportunity for the New York State Health Benefit Exchange) includes the following deliverables that support the requirements to plan for, develop training and user support materials, and conduct end user training:

- P-21 Training Plan – description of training effort to use/support the system
- D-23 User Manuals – description of how to use the system from a business perspective
- D-24 O&M Manual – Description of production processing, maintenance, monitoring, and identification of problems

The NY-HX Integrated Master Schedule (IMS) is being re-planned and will include more detail, including more detailed predecessor relationships and dependencies and includes deliveries of these documents with updates by Release. The current estimated delivery of these documents is scheduled for December 2012 for the Plan Management Release:

Name	Baseline Start	Baseline Finish
DELIVERABLE: NY-HX PM NY-HX PM User Manuals (F)	**NA**	**NA**
CSC Submits NY-HX PM User Manuals (F)	Mon 12/3/12	Mon 12/3/12
DOH Reviews Submitted NY-HX PM User Manuals (F) (5 days)	Mon 12/10/12	Mon 12/10/12
CSC Resubmits Updated NY-HX PM User Manuals (F) (2 days)	Wed 12/12/12	Wed 12/12/12
DOH Conducts Final Review of NY-HX PM User Manuals (F) (Updates Only) (3	Mon 12/17/12	Mon 12/17/12
CSC Updates Final Review of NY-HX PM User Manuals (F) (1 day)	Tue 12/18/12	Tue 12/18/12
DOH Confirms Final Updates and Accepts NY-HX PM User Manuals (F) (1 day)	Wed 12/19/12	Wed 12/19/12
DELIVERABLE: NY-HX PM O&M Manual (F)	**NA**	**NA**
CSC Submits NY-HX PM O&M Manual (F)	Mon 12/3/12	Mon 12/3/12
DOH Reviews Submitted NY-HX PM O&M Manual (F) (5 days)	Mon 12/10/12	Mon 12/10/12
CSC Resubmits Updated NY-HX PM O&M Manual (F) (2 days)	Wed 12/12/12	Wed 12/12/12
DOH Conducts Final Review of NY-HX PM O&M Manual (F) (Updates Only) (3 days)	Mon 12/17/12	Mon 12/17/12
CSC Updates Final Review of NY-HX PM O&M Manual (F) (1 day)	Tue 12/18/12	Tue 12/18/12
DOH Confirms Final Updates and Accepts NY-HX PM O&M Manual (F) (1 day)	Wed 12/19/12	Wed 12/19/12
DELIVERABLE: NY-HX PM Training Plan (F)	**NA**	**NA**
CSC Submits NY-HX PM Training Plan (F)	Mon 12/3/12	Mon 12/3/12
DOH Reviews Submitted NY-HX PM Training Plan (F) (5 days)	Mon 12/10/12	Mon 12/10/12
CSC Resubmits Updated NY-HX PM Training Plan (F) (2 days)	Wed 12/12/12	Wed 12/12/12
DOH Conducts Final Review of NY-HX PM Training Plan (F) (Updates Only) (3 days)	Mon 12/17/12	Mon 12/17/12
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DOH Confirms Final Updates and Accepts NY-HX PM Training Plan (F) (1 day)	Wed 12/19/12	Wed 12/19/12

2. Overview

Instructions: Briefly describe the purpose and context for the system or situation, and summarize the history of its development. Summarize the training effort needed to support the system or situation. Describe the project and/or organizational boundaries of the training, such as initial training for system users, remedial training for system operations and maintenance staff, etc.

3. Assumptions/Constraints/Risks

3.1 Assumptions

Instructions: Describe any assumptions or dependencies that have a significant impact on the training plans for support and/or use of the system.

3.2 Constraints

Instructions: Describe any limitations or constraints that have a significant impact on training plans for support and/or use of the system.

3.3 Risks

Instructions: Describe any risks associated with training plans for support and/or use of *the system and proposed mitigation strategies.*

4. Training Approach

4.1 Training Needs

Instructions: Identify the personnel needing training, their current skill levels, and the competencies required for each to effectively use and/or support the system. Describe the training needed to close any skill gap and bring the resource to the appropriate competency level. Identify the training needs for the user's staff if the implementation of the system under development will change the procedures of the user's office in any way. Also identify the timeframe the required training is needed.

Personnel to be Trained	Current Skill Level	Required Competencies	Training Needed	Timeframe Needed

Table 1: Training Needs

4.2 Prerequisites

Instructions: Identify any prerequisites for individuals to receive training, and develop a strategy regarding prerequisite training as necessary.

4.3 Methods & Tools

Instructions: Describe the training methods to be used and the curriculum for each training method. The methods may include COTS, GOTS, and/or custom-developed computer-based and/or web-based instruction, self-paced written manual, peer training, mentoring, consultation, hands-on practical sessions, classroom lectures, webinars, or any combination of the above. If multiple methods of training will be used, describe each of them in detail in appropriate sub-sections.

If the training will be custom-developed, describe how the course content and training materials will be developed, reviewed, evaluated, maintained, and distributed. Also identify the tools needed for the training (e.g., computer workstations, training materials *(e.g., manuals, classroom facilities, and any computer center resources). Be sure to address Section 508 compliance of all electronic training materials and reasonable accommodation for the disabled as appropriate (e.g., closed captioning for video presentations). Identify potential sources (e.g., vendors), costs for providing the training, and locations if applicable. If appropriate, individual course synopses may be included in an appendix to the document that is referenced here.*

4.4 Roles & Responsibilities

Instructions: Identify the personnel and their responsibilities for developing and implementing the training, development and distribution of instructional materials, etc. Also identify the person(s) and organization(s) that will conduct the training. Identify any other groups who may serve as consultants, such as members of the development team, experienced users, etc.

4.5 Training Development Schedule

Instructions: Provide a schedule of training activities to be accomplished in accordance with this Training Plan, which may or may not include actual course information. Show the required tasks in chronological order, with beginning and ending dates of each task, the key person(s) responsible for the task, dependencies, and milestones. If appropriate, tables and/or graphics may be used to present the schedule. Ensure that this information is appropriately integrated into the overall project schedule. The schedule should be as comprehensive as possible; however, the schedule may be revised as needed at later points in the lifecycle.

Task #	Task Description	Begin Date	End Date	Key Person(s) Responsible	Dependencies	Milestones

Table 2: Training Schedule

5. Training Administration

5.1 Training Evaluation

Instructions: Describe how training evaluation will be performed. Describe how feedback will be elicited from personnel to ensure that training objectives were met (e.g., evaluation tools, forms, etc.). Also describe how the feedback will be analyzed and what will be done with the results, as well as how changes to the training and training materials will be made as a result of the evaluation process.

5.2 Monitoring & Reporting

Instructions: Describe how training registration and training completion will be monitored and tracked..

Appendix A: Course Synopsis

Instructions: Utilize appendices to facilitate ease of use and maintenance of the Training Plan. Each appendix should be referenced in the main body of the document where that information would normally have been provided. Suggested appendices include Course Synopses, if applicable, to provide detailed descriptions for each prescribed training course.

Type	*Enter the type of training (e.g., hands-on classroom training, lecture, webinar, individual computer-based training (CBT), individual web-based training, etc.)*
Duration	*Enter how long it will take for an individual to complete the course.*
Dates / Locations	*Enter the planned dates/locations for the course, if applicable.*
Audience	*Enter the target audience for the course (i.e., who should complete the training).*
Prerequisites	*Enter any prerequisites that course participants should have (e.g., prior training, practical experience, etc.).*
Summary Description	*Enter a brief description of the course focusing on the anticipated benefits*
Course Objectives	*Enter at a high-level what the participants will learn in completing the course, which may be presented as bulleted items*
Course Content	*Enter in detail the content of the course, which may be presented in the form of an outline.*
Testing / Certification	*Enter any exams/certifications following completion of the course.*
Related Courses	*Enter any related courses.*
Logistics	*Enter any logistical arrangements necessary for delivery of the course (e.g., instructions regarding participant registration, access to the training facility, hardware/software installation/configuration, establishment of user accounts/passwords for accessing the training, etc.).*

Table 3: Course Synopsis

Acronyms

Instructions: Provide a list of acronyms and associated literal translations used within the document. List the acronyms in alphabetical order using a tabular format as depicted below.

Acronym	Literal Translation
CMS	Centers for Medicare & Medicaid Services
COTS	Commercial Off-The-Shelf
GOTS	Government Off-The-Shelf

Table 4: Acronyms

Glossary

Instructions: Provide clear and concise definitions for terms used in this document that may be unfamiliar to readers of the document. Terms are to be listed in alphabetical order.

Term	Definition

Table 5: Glossary

Referenced Documents

Instructions: Summarize the relationship of this document to other relevant documents. Provide identifying information for all documents used to arrive at and/or referenced within this document (e.g., related and/or companion documents, prerequisite documents, relevant technical documentation, etc.).

Document Name	Document Number and/or URL	Issuance Date

Table 6: Referenced Documents

Record of Changes

Instructions: Use the table below to record information regarding changes made to the document over time.

Version Number	Date	Author/Owner	Description of Change

Table 7: Record of Changes

Approvals

Instructions: Obtain signature approval of the final document from the delivering organization's Approving Authority, the primary CMS recipient (i.e., generally the Government Task Leader (GTL), and the Business Owner. Additional signature lines may be added as needed.

The undersigned acknowledge that they have reviewed the Training Plan and agree with the information presented within this document. Changes to this Training Plan will be coordinated with, and approved by, the undersigned, or their designated representatives.

Signature:	______________________	Date:	__________
Print Name:	______________________		
Title:	______________________		
Role:	Submitting Organization's Approving Authority		

Signature:	______________________	Date:	__________
Print Name:	______________________		
Title:	______________________		
Role:	CMS' Approving Authority		

Signature:	______________________	Date:	__________
Print Name:	______________________		
Title:	______________________		
Role:	CMS Business Owner		

Notes to the Author / Template Instructions

This document is a template for creating a Training Plan primarily for use by a given new development, system redesign, or major enhancement project. This template includes instructions, boilerplate text, and fields that should be replaced with the values specific to the particular project.

- *Each section provides instructions or describes the intent, assumptions, and context for content included in that section.*
- *Instructional text in each section should be replaced with information specific to the particular project.*
- *Some text and tables are provided as boilerplate examples of wording and formats that may be used or modified as appropriate.*

When using this template, follow these steps:

1. *Modify any boilerplate text, as appropriate, to your specific project.*
2. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. The primary styles used in this document are:*
    - *Heading 1 (Arial Narrow, 18 pt, Bold)*
    - *Heading 2 (Arial Narrow, 16 pt, Bold)*
    - *Boilerplate and body text is Normal (Arial, 11 pt)*
3. *Do not delete any Headings. If the Heading is not applicable to the project, indicate "Not Applicable" under the Heading.*
4. *Figure captions and descriptions are to be placed centered, above the figure. All figures must have an associated tag providing appropriate alternative text for Section 508 compliance.*
5. *Table captions and descriptions are to be placed centered, below the table.*
6. *All documents must be compliant with Section 508 requirements.*
7. *Delete this "Notes to the Author / Template Instructions" page and all instructions to the author before finalizing the initial draft of the document.*