A stylized, high-contrast illustration in shades of blue, yellow, and white. It depicts a person from the chest up, wearing a suit and tie, looking down at a large document or book they are holding. The person's hand is resting on their chin in a thoughtful pose. The background is a mix of light blue and yellow, with white outlines defining the figure and the document.

**Evacuation of Facilities in Disaster Systems 3.0
(eFINDS)**

Master Trainer and Facility Trainer Curriculum

December 2016

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Purpose of Training Curriculum

Training situations vary greatly; therefore, the materials provided in this manual should be viewed as a guide to conducting an eFINDS training. The knowledge level of participants and the training context are all factors that you will need to consider when planning your own training.

This training curriculum consists of five modules and each module includes a goal, learning objectives, training methodology, time required and training resources and references. Slides are accompanied by training notes that provide information to help trainers deliver content. The eight-hour curriculum is designed for approximately 20 facility trainers. When providing training to facility staff the curriculum is approximately four hours. However, the content, activities and allotted time can be modified to accommodate smaller groups. To ensure you stay within time allotted for each section you may wish to utilize a "Parking Lot" to track questions that will be answered during the training.

The expected outcome of this training is the development of confident, competent healthcare staff who are able to utilize eFINDS in their facility in the event of an emergent, urgent or planned evacuation.

Facility Trainers may need to tailor training to their facility's eFINDS process and procedure. Since each facility may implement eFINDS differently not all training exercises and eFINDS features (register and update) will fit each facility. To determine which exercises and eFINDS features will make sense for a facility the facility trainer may want to have a discussion with management. Having a dialogue with the planners prior to the training will provide the facility trainer with much needed insight and allow them to properly guide their trainees to follow the predefined evacuation plans. During this discussion, the facility trainers can also provide information to the planners in regard to eFINDS' processes. If management is not available to discuss then the facility trainer should review the evacuation plan prior to the training and plan which scenarios should be included in facility training.

Teaching Tips

Choosing the Venue

Attention needs to be given to selecting an appropriate venue for the training. The geographic location as well as the actual physical space such as the size, layout of the room and Wi-Fi accessibility can have a major impact on the outcome of the training. When choosing a venue, some things you should consider include the following:

- Does the location pose any security issues for participants?
- Is it easily accessible?
- Is the physical space appropriate for a participatory training process (e.g., can tables and chairs be moved around to accommodate breakout group)
- Does room have Wi-Fi accessibility?
- Does the room have a computer for each participant?

Selecting Participants

- Participant selection must be related to the planned output of the training which in this case is the execution of eFINDS in the event of an evacuation. Therefore, participants selected should have some responsibility for the evacuation of people.
- Other considerations to keep in mind, in terms of the overall group of participants, is the commitment and availability of participants.

Preparing Participants

- Ensure each participant has a Health Commerce System (HCS) Account with an active password and has been assigned to either the role of eFINDS Reporting Administrator or eFINDS Data Reporter (refer to definitions in Appendices B & D).
- If training room is not a Lab Computer room then ensure that each participant brings a laptop or one is provided

Preparing a Schedule for Your Training

As stated previously, the training as described in this manual is designed to take place over a one day period. Suggested time frames for the modules and activities have been provided as well as a suggested breakdown of activities. It is important to remember that the time frames given are only guidelines; the number of activities and the time allotted can be adapted as appropriate to the needs of your participant group. The schedule provided includes activities contained in the manual as well as break and lunch.

Teaching Strategies

- Ask questions. Questions can open a learning conversation or shut it down.
- Review statements. By rephrasing what you have heard you clarify your own understanding and encourage the adult learner to hear what it is she or he has stated.
- Foster discussion. Discussion extends learning and introduces other perspectives. It allows for reciprocity between learner and learner, and learner and trainer.
- Listen reflectively. This provides an opportunity to process information introduced by the future trainer. Active listening skills are essential for effective discussion facilitation. It builds understanding and consensus in a group. Active listening skills include: encouraging; paraphrasing; clarifying; reflecting; summarizing; and validating
- Provide consistent feedback. Candid and compassionate feedback can be a powerful stimulus for learning as it addresses the learners need for immediate application.

Evaluation and Follow Up

The purpose of evaluation is to gather feedback on the content and process of the eFINDS training and also to help participants reflect on their learning.

Evaluation data should be collected at the end of the training as well as informally through discussions with participants throughout the workshop. A sample end-of-training general evaluation is provided in Appendix A of this manual. You may however choose to develop other instruments that may be more suitable for your facility and particular target audience. The information gathered from the evaluations should be used to refine your training, if necessary.

Training Preparation – Master Trainer

At least six weeks prior to training

- Download all training material from the NYSDOH Health Commerce System (Go to My Content>Documents by Group>Hospitals group>Preparedness folder>e-Finds>eFINDS Train the Trainer
- Generate a Training Announcement and post training on the LMS
- Distribute announcement to hospitals
- Instruct registered attendees that they must have a current and active HCS account and password to participate in training Instruct registered attendee to provide trainer with HCS User Id
- Instruct registered attendees they must be assigned to the role of eFINDS Reporting Administrator (see Appendix B for description of this role)
- If registered attendees are not in this role or do not know if they are in this role then instruct them to request to be assigned to the eFINDS Reporting Administrator role by contacting their HCS (HPN) Coordinator
- Look up role of attendees to ensure they are in an eFINDS Reporting Administrator role (see Appendix C)
- Instruct registered attendees to bring copies of Quick Reference Cards (4) which can be found on the NYSDOH Health Commerce System at (my content>my documents>hospital group>preparedness>efinds>train the trainer)
- Instruct attendees to bring facility training wrist bands (7) that end in “D”
- All wristbands are white, but to differentiate the training bands from the real bands, look for ***TRAINING*** on each side of the barcode number and see that each number ends in a D-for demo.
- Instruct attendees to bring a facility scanner

Training Preparation – Facility Trainer

At least six weeks prior to training:

- Distribute announcement to facility management
- Work with facility management to identify who should attend training based on each staff person's planned responsibility using eFINDS during an evacuation
- Work with facility management to identify eFINDS role (*see Appendix B & D*) each attendee should be assigned Send training announcement to identified attendees and instruct them to enroll in training
- Instruct attendees to have a current and active HCS account and password
- Instruct attendees that they must be assigned to a role designated by facility management (eFINDS Reporting Administrator or the eFINDS Data Reporter) in the HCS Communications Directory Provide participants with the name(s) of facility's HCS (HPN) Coordinator and instruct attendee to request to be assigned to the appropriate role

Alternatively, a trainer may provide a list of the enrolled trainees to an HCS Coordinator at facility and request all attendees be assigned to the proper role (see Appendix E). Trainer or HCS (HPN) Coordinator should check with trainee supervisor or hospital management as to which role the trainee should be assigned

At least one week prior to training:

- Email participants and remind them to enroll in eFINDS Prerequisite webinar (CTI-502 eFINDS on the LMS www.nylearnsph.com)
- Email participants and instruct them to print slides
- Email participants and instruct them to bring a laptop with Wi-Fi access if training room does not have laptops
- Ensure participants will have Wi-Fi access in training room if they need to bring their own laptops
- Request additional training wristbands (efinds@health.ny.gov) if needed
- Ensure you have scanner(s)

Scanner shipped by DOH

Hospital scanner that has been programmed with eFINDS

Android or IOS devices e.g., iPads or Cell Phones for eFINDS Mobile
Release middle January 2017

- Print "Paper Patients" with name, date of birth (DOB) and gender

Training Preparation – Facility Trainer

- Be sure to add any custom information such as your name and contact information to the slide deck and the participant guide
- Print barcode sheets (PDF Log)

At least one day prior to training:

- Generate a sign in sheet which includes of facility name, training date and time, trainer name, legible participant name and role.

Day of Training – Master & Facility Trainer

- Make sure you have the latest version of slide deck
- Arrive at least 30 minutes early
- Welcome each attendee as they arrive and ask them sign in
- Load slide decks
- Log into the NYSDOH Health Commerce System
- Bring the paper barcode log
- Bring copies of evaluation

Training Follow-up – Master & Facility Trainer

- Complete attendance and grades for TtT in the LMS if course was posted in LMS
- Email participants thanking them for attending the training

Technical Questions

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Module 1: Introduction

Duration: 40 minutes

Goal of module: To ensure a favorable training experience by welcoming participants, explaining the purpose of the training and reviewing the agenda training.

Learning Objectives:

By the end of Module one participants will be able to:

- Introduce the trainer and participants
- State the purpose and goal of training
- Describe topics that will be covered in training
- Distribute Participant Handbook

Training Methodology:

Didactic Session - Trainer will welcome participants, introduce her/himself and state purpose of training.

Group Exercise - Participants will introduce themselves by stating their name, role in the healthcare facility and expectation of training. Expectations should be written on newsprint by trainer.

Didactic Session – Trainer should review training outline while validating the list of training expectations.

Instructor Resources and Training Materials

- Slides # 1-2
- Newsprint and markers
- Participant Handbook

Instructor Tips:

A welcome session can vary depending on the style of the trainer and host organization. Trainers should try to avoid situations where the trainees have to sit through presentations that are of little interest to them, resulting in boredom and concern about the format for the rest of the training. Trainers should make sure that the trainees are given a voice during this important first module as it will set the tone for the rest of the training. A person's first impression of the training can shape their whole experience

Module 2: Background and Overview of eFINDS™

Duration: 20 minutes

Goal of Module: To provide participants with an understanding of the how and why eFINDS was developed.

Learning Objectives:

By the end of Module 2 participants will be able to:

- Identify the purpose and background of eFINDS
- Describe key data and functional requirements of system
- Understand the importance of utilizing eFINDS when evacuating
- Understand the regulatory requirement for utilizing eFINDS when evacuating

Recognize implications of HIPAA in regard to data security sensitivity

Training Methodology:

Didactic

Instructor Resources and Training Materials:

Slides # 3 – 13 (Master Trainer)

Slides # 3 - 12 (Facility Trainer)

Instructor Tips

It is critical that participants understand why eFINDS was developed and their obligation to utilize eFINDS in an evacuation. This module lays the foundation for why facilities need to utilize system to track people in the event of an evacuation.

Module 3: Planning Considerations for Master Trainers

Goal of Module: To ensure that Facility Trainers gain an understanding of the considerations a facility needs to take into account to ensure successful planning and implementation of eFINDS.

Learning Objectives:

By the end of Module 3 participants will be able to:

- Understand the importance of why eFINDS should be integrated with their facility's evacuation plan and coordinated with the logistics and procedural plans of facility's resources, physical environment and policies
- Understand the importance of training and drilling on eFINDS as both a sending and a receiving facility; integrate with pre-planned send/receive arrangements by incorporating those partners in drills and exercises
- Understand the process for questions and ordering of additional wristbands and process for restoring fresh wristband supplies and barcode numbers following the exhaustion in an actual emergency
- Increase awareness of what needs to be understood and shared with facility management, people and their family/friends/caregivers
- Increase awareness of the number of staff that need to be trained in use of eFINDS per shift; assurance of their HCS account status and assignment to HCS communications directory eFINDS roles for appropriate access
- Understand the importance of knowing where eFINDS supplies and equipment are stored and who has access to this equipment if locked
- Increase awareness of how to use eFINDS data for situational awareness of their patient/resident location status
- Increase awareness of how to utilize intermediate evacuation/tracking points within a facility if desirable
- Increase understanding of the types of key medical information that should be entered into eFINDS

Understand how the barcode may be used to identify other patient equipment, supplies, medications, clothing and personal care items

Training Methodology

Didactic

Instructor Resources and Training Materials:

- Slides # 1 - 34
- Planning and Job Action Templates
- eFINDS Procedure Algorithm Flowchart Diagram

Module 3: Planning Considerations for Facility Trainers

- New York State Department of Health (NYSDOH) Non-emergency eFINDS Request Process
- Facility eFINDS Planning Consideration Checklist (Appendix F)
eFINDS Functions Matrix (Appendix G)

Module 3: Planning Considerations for Facility Trainers

Goal of Module: To ensure that staff gain an understanding of the facility's Evacuation Plan and implementation of eFINDS

Learning Objectives:

By the end of Module 3 participants will be able to:

- Increase their understanding of their facility's eFINDS plan and procedures for evacuation

Training Methodology

Didactic

Instructor Resources and Training Materials:

Slides # 13 – 27

Facility eFINDS Planning Consideration Checklist (Appendix F)

Recommended Functions Matrix (Appendix G)

Module 4: Hands-on eFINDS™ Training

Duration: 120 minutes

Goal of Module: To allow participants the opportunity to utilize and learn the features and functionality of the system through hands on experiential learning.

Overall Learning Objectives:

At the end of the training session, the participant will be able to:

- Identify the roles needed to access eFINDS, and the permissions granted to those roles.
- List the new statuses in eFINDS 3.0 and the corresponding actions and buttons used to update the status.
- Determine which new report to select to review certain data about an operation, a facility or person, and which reports can be exported.

As an Evacuating/Sending facility

- Know when and how to create an Operation and Temporary Location
- Determine best method to register people and update their statuses to Evacuated, SIP or Repatriated.

As a Receiving Facility

Determine the best method to receive people from an evacuating facility, and update their status to Received, Repatriated Initiated or Will Not Repatriate.

Training Methodology:

Trainer will guide participants through a series of hands-on training exercises so they are able to practice the functionality of the system as well as gain an understanding of the features.

Training Tips:

Some exercises and features for sending and receiving may not be relevant to facility's evacuation plan when implementing eFINDS. Therefore, facility trainers should only train on those features that facility will be using when sending and/or receiving.

When teaching, the exercise portion the trainer should try to make the exercises relevant to the participants. Try relating to the exercises by emphasizing the purpose of knowing what to do and when to do it. Change training scenarios to make them more relevant to the facility. This will help participants stay engaged. Eye contact with the participant, rather than on the computer screen, is necessary as well as calling participants by their name.

Each facility should have both a set of real and a set of training wristbands and know their location. Real wristband quantities are based on the facility's

licensed beds. Training bands are clearly marked as training and the barcode number ends in a D for demo.

A wristband contains the facility name, and a unique barcode. Wristbands that begin with HO are for hospitals, wristbands that begin with NH are for nursing homes, and wristbands that begin with AC are for adult care facilities. The next four numbers represent the hospital or nursing home PFI (permanent facility identifier). When the barcode begins with an AC a series of three numbers, hyphen, letter, hyphen, three more numbers (e.g., 240-F-878) is the facility license number. This naming convention allows for each facility to be unique. The remaining five numbers are the patient ID, beginning with 00001-99999. If the barcode ends in a D the wristband is for training and cannot be found in the real eFINDS Evacuation site. Alternatively, a wristband not ending in a D cannot be found in eFINDS Practice/Demo.

Event Administration Exercises Overview

A potentially dangerous problem with your facility's (Sending Facility) electrical wiring has been found and the fire department has ordered repairs that will require you to evacuate your all of your people.

You need to use of eFINDS™ to track your people during this emergency.

Wristbands and scanner are located and deployed within your facility and mobile devices may be used if available. The Incident Commander is requesting the use of a paper log for additional internal tracking purposes.

When an emergency only affects your facility you do not need to wait for The New York State Department of Health (NYSDOH) to create an operation for this event. Your eFINDS™ Reporting Administrator should create the operation immediately.

In exercises 1-14, your facility (Sending Facility) will be evacuating a certain percentage of people to NYSDOH regulated facilities that you have prearranged send/receive arrangements with. The remaining percentage will be sent to a temporary location. For demonstration purposes, you will only need to enter the three (3) people into eFINDS that will be evacuated to the temporary location. You are not certain that this temporary location is currently listed in the eFINDS Practice System so you must first search for it and if it is not listed, add it.

Exercises 15-23 will explore other functions of eFINDS for a NYS added operation.

Please note: Complete these exercises first! All administrative exercises must be completed in order to complete the other hands-on eFINDS™ exercises in this curriculum.

Exercise 1: Install eFINDS™ Mobile Application (A-1)

Please note: This exercise is optional. Mobile devices may be used with eFINDS™ but it is not required. As of this December 2016 the eFINDS™ mobile applications for iOS and Android are unavailable due to a planned upgrade and change in the distribution channel. An addendum to this curriculum will be made available when mobile applications are once again available.

Learning Objectives:

Successfully install and uninstall eFINDS on their mobile device.

Successfully scan a training barcode.

Learning Methodology:

The procedure for installing the mobile application will be provided once the application has been updated and re-deployed.

1. Log on to the HCS from your **MOBILE** device (<https://commerce.health.state.ny.us>)
2. Click **+Show My Applications** > Click **e-FINDS**
3. Select your location
4. Click **Submit**
5. Click **Mobile Download** from the menu bar
6. Select **Android** or **iOS**
7. Confirm **Install**
8. Wait for application to install on mobile device; progress is displayed on screen

Future versions of the eFINDS mobile application may be distributed through the Apple App Store and Google Play Store. As such, participants will need data access from their devices and an account with the relevant service to install the applications.

If participants choose to utilize their wireless data plans to install the application, standard data rates will apply.

Instructor Resources and Training Materials:

Slide # 39 (Master Trainer)

Slide # 32 (Facility Trainer)

E-FINDS_QuickReferenceCard_Mobile

Instructor Tips:

Uninstall any version of eFINDS mobile currently on your devices until the Mobile release is announced in January 2017. Anytime a new version becomes

available a person will need to uninstall eFINDS and then download/reinstall the updated version of the App.

Exercise 2: Download Barcode Assignment: Scannable Log (A-2)

Learning Objective:

Demonstrate how an evacuating/sending facility can download a scannable log.

Training Scenario:

You need to use of eFINDS to track your evacuees. Download and print the Scannable Log (PDF).

Learning Methodology:

Through experiential learning the trainer will guide participants through an exercise by instructing them to:

eFINDS Administrator Role Only

1. Login to the HCS (<https://commerce.health.state.ny.us>)
2. Click eFINDS (from My Applications List, left side of HCS home page)
3. Select **Practice Only**
4. Select your facility > Click **Set Location**
5. Click **Manage Barcodes > Download Barcode Documents**
6. Enter Start & End Barcode Number (optional)
7. Select Barcode Assignment: Scannable Log (pdf)
8. Check box to exclude used barcodes
9. Click **Download Document**
10. Print the scannable log.

Note: PDF files cannot be uploaded, but could be sent with transport or faxed to receiving facility. The Avery Label is for the person's belongings.

Instructor Resources and Training Materials:

Slides # 40 - 42 (Master Trainer)

Slides # 33 – 35 (Facility Trainer)

eFINDS_QuickReferenceCard

Be sure to note eFINDS version 3 cards are printed.

Instructor Tips:

Knowing where your eFINDS Supplies are is crucial.

Having one or more copies of the Scannable PDF log will be extremely helpful if there is a power or internet outage or if an urgent evacuation is needed and there is no time for registration of people into eFINDS.

Know where the facility eFINDS supplies are kept, that is, not in a locked storage closet but a safe place where your staff can access them whenever needed.

Remember that if you only have time to get the wristband on the people, and get them to a safe location, registration can occur later. With a wristband we can always determine the facility that a person originated from. This could be very important especially during a large-scale event with people ending up in temporary shelters

Exercise 3: Create an Operation for an EFINDS Training, Exercise, or Actual Event (A-3)

Learning Objectives:

Demonstrate how an evacuating/sending facility would create an operation in eFINDS for their full facility evacuation

Training Scenario:

You are a 20-bed facility and there is a power outage and the backup generator cannot support all of the equipment.

Your facility is at maximum capacity; a full facility evacuation is needed.

You have made sending arrangements with other facilities and these arrangements can accommodate but 90% of your people (18 people). The remaining 10% (two) people who cannot be transferred to the other facilities will be sent to a local high school < or TMP Location of your choice > until power is restored.

An evacuation operation needs to be created.

Learning Methodology:

Through experiential learning the trainer will guide participants through an exercise by instructing them to:

eFINDS Administrator Role Only

1. Click **Admin** from the eFINDS menu bar
2. Click **Manage Operations**
3. ALWAYS search Name list first to be sure you are not creating a duplicate operation
4. Select **Begin Date > Event Type**

If you select Blizzard, Hurricane, Ice Storm or Snow Storm, then enter the Storm Name. If you select Other, then enter Other Description.

5. Enter **location**, e.g., your facility, town/city/village
6. Verify **Active Status**
7. Click **Add Operation** Note: You may need to click Add Operation twice.
8. Verify Operation YYYY-MM-DD EVENT TYPE LOCATION was created.

Instructor Resources and Training Materials

Slides # 43 – 44 (Master Trainer)

Slides # 36 – 37 (Facility Trainer)

- An Operation is the reason for the evacuation

- See PDF file: e-FINDS_QuickReferenceCard-Operation

Instructor Tips

If you have attendees from the same facility, then consider give each training participant a different reason for evacuating or make each session operation unique by adding the creator of the operation's user ID, e.g., in the location field include facility name and user ID.

Emphasize step 3 and step 7 notes that you may need to click Add Operation twice. Check for the Verify message in blue at the top of the page that Operation was created.

The operation name is built as the answers are selected or typed in the Manage Operations page. Each Operation should be unique and specific to the facility.

Upon completion of the training session the Operation status should be changed to Inactive and the operation should be saved. This will minimize the number of training operations in the Operation drop down list.

Important Reminder! Inform the participants that in the event of a large scale emergency involving multiple facilities the NYSDOH will create the Operation and inform all facilities, using the HCS Integrated Alerting and Notification System (IHANS) which Operation will be used for that emergency. A facility will only create an Operation when it is an emergency involving only their facility.

Exercise 4: Create a Temporary (TMP) Location (A-4)

Learning Objectives:

Demonstrate how an evacuating/sending facility would create temporary location using the suggested naming convention: Location Name (e.g. Public School 304), Description (e.g. HS), town or city (e.g. Albany).

This function has not changed in eFINDS 3.0.

Training Scenario:

Due to the operation created in exercise 1, you now need to create the Temporary Location for the High School <other TMP location> across the street.

Eighteen (18) of the 20 people at your facility will be evacuated to NYS hospitals. These facilities are already in eFINDS and can be selected from the Intended Destination Org. Type (Hospital) and the Intended Destination dropdown list. The Temporary Location cannot be selected until it is created.

Learning Methodology:

Through experiential learning the trainer will guide participants through an exercise by instructing them to:

eFINDS Administrator Role Only

1. Click **Admin** from the eFINDS menu bar
2. Click **Manage Locations**
3. ALWAYS search Name list first to be sure you are not creating a duplicate temporary location
4. Enter **Location Name** (e.g. Public School# 304), **Description** (e.g. HS), **town or city** (e.g. Albany) **Note:** If you create the temp location in Practice Only, it will not appear in real Evacuation or vice versa.
5. Enter Description, Address, City, State, Zip, Phone
6. Click **Add Location**
7. Verify Location <Name Description Location> was created.

Instructor Resources and Training Materials:

Slides # 45 – 46 (Master Trainer)

Slides # 38 – 39 (Facility Trainer)

See eFINDS_QuickReferenceCard_TempLocation

Instructor Tips:

This function has not changed in eFINDS 3.0.

Emphasize the naming convention in Step 4

This location is specific to your training session, i.e., one receiving location per training. This will allow participants to play both the sending and the receiving facility roles.

A temporary location (e.g., stopover point used before a patient/resident can arrive at final destination) can be added to the eFINDS application by an eFINDS Reporting Administrator OR your state or state agency eFINDS administrator.

Recommended “Temporary Location” naming convention: name of location and description, e.g., St Sophie’s Church, and city or town. To include user id. For example: Jason’s Place jp123654. By adding a HCS user ID or training date can help keep locations unique.

Upon completion of the training session, the Temporary Location status should be changed to Inactive and the location should be saved. This will minimize the number of temporary locations in the patient/resident location and intended destination drop down list.

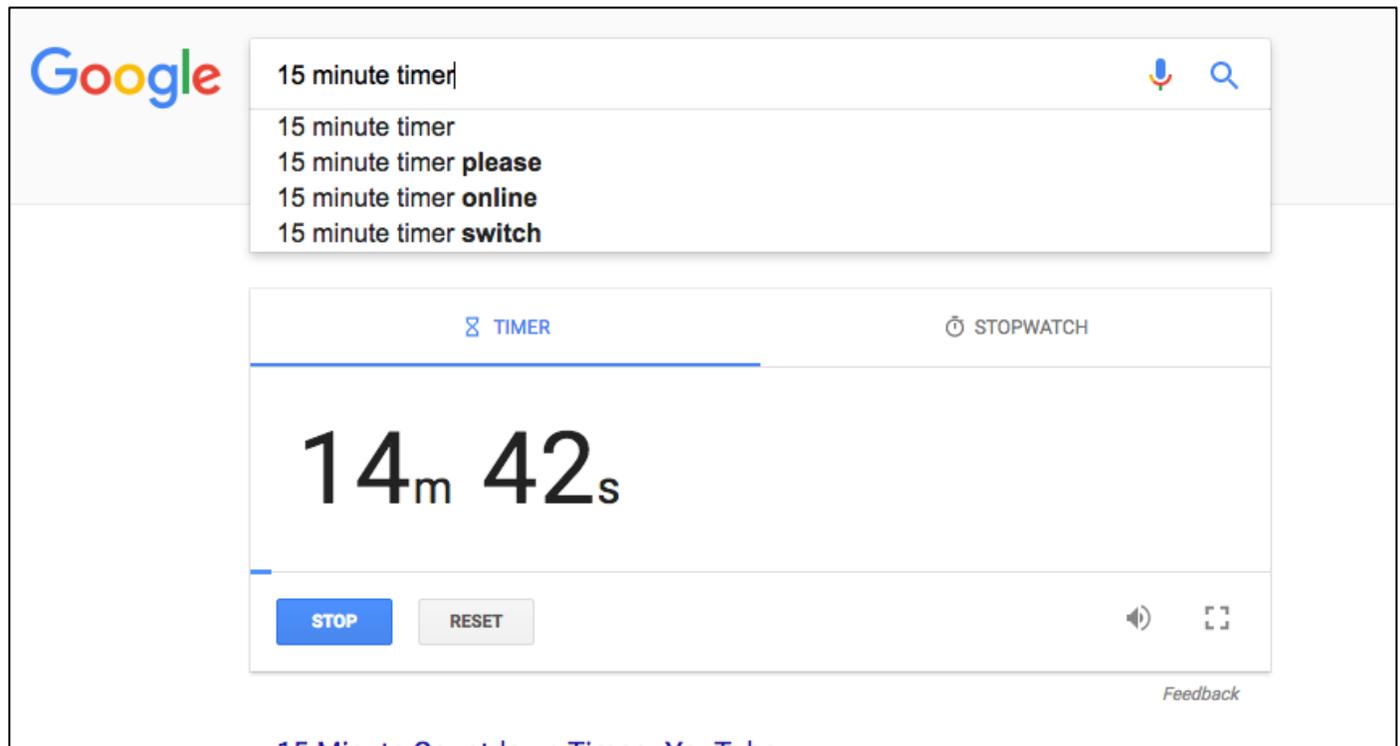
Break Time!

Duration: 15 Minutes

Did You Know?

You can ask Google for a timer to keep track of your break times.

Just google **15 minute timer** and Google will display a 15 minute timer and begin counting down.



Evacuation Exercises Overview

Your facility begins preparing for evacuation by placing wristbands on two people and registers them in eFINDS Demo using the newly created operation and the newly created temporary location (TMP) as the intended receiving destination

Exercises 5 through 13 represent the typical round trip for two people from your organization. You will begin by registering them in eFINDS™, and then indicate when they actually evacuate the facility. You will then switch roles and play the receiver at the temporary location to indicate when your people arrive at the temporary location, and to initiate repatriation (send them back home) when it is safe for them to return. Finally, you will go back to your original role as the evacuating facility to mark your people Repatriated when they arrive back at the facility at the conclusion of the event.

Along the way you will deal with a third person who is too ill to physically evacuate from the building.

Exercises 14 through 23 will explore other eFINDS features so that you will have a complete understanding of the tool and be better informed to determine which features are best applied at your facility.

Exercise 5: Register a Single Person with Scanner (R-1)

Learning Objectives:

Demonstrate registering a person with the scanner.

Training Scenario

Your facility is ready to send two people to the temporary location just created, along with two employees/staff members.

Facility Staff at the Temporary Location have eFINDS Data Reporter roles to update the evacuees' status when they arrive.

Wristbands have been placed on the patient's wrists, and they are currently waiting for transportation.

You will scan one wristband and then type in the second barcode number to register two people in eFINDS™.

Learning Methodology:

Through experiential learning the trainer will guide participants through an exercise by instructing them to:

1. Click **Register People** > Scan a barcode from the Scannable Log (pdf)
2. Confirm: **Status Available** This means barcode is located and no person is registered to it.
3. Enter *First Name, *Last Name, *DOB (mm/dd/yyyy) & Select Gender
4. Select Employee ID (Emp #) from MR/Emp # Type drop down list
5. Enter an employee's name
6. Select or Verify **Evacuation Operation** (reason for evacuation in exercise 2)
7. Verify person's current location is correct
8. Select the Intended Destination from dropdown list, i.e. Temp Location from exercise 3
9. Enter Evacuee Group Description; such as Bus #, transportation description or facility unit (optional)
10. Click the **Register**
11. Confirm message: Register is completed.

At the very minimum, the evacuating facilities will only need to place the barcoded wristbands on their people and send them to a safe location. The receiving locations can scan wristbands, and update the location information when they arrive.

Instructor Resources and Training Materials:

Slides # 47 – 48 (Master Trainer)

Slides # 40 -41 (Facility Trainer)

See eFINDS_QuickReferenceCard

Instructor Tips:

Be careful not to over-write patient data by verifying message Status: Available

The Note section on the patient record is limited to only 255 characters and spaces and can be used for any purpose.

Exercise 6: Register a Single Person Without Scanner (R-2)

Learning Objectives:

Demonstrate successfully registering a person by typing the barcode, i.e., not using the scanner.

Demonstrate bypassing require information.

Training Scenario:

You now need to register a person but do not have a barcode scanner available. You also do not have date of birth or gender information for this person.

Learning Methodology:

Through experiential learning the trainer will guide participants through an exercise by instructing them to:

1. Click **Register People** > and type a barcode from the Scannable Log (pdf)
2. Confirm: **Status Available**
3. Enter *First Name and *Last Name only
4. Select or Verify Evacuation Operation (reason for evacuation in exercise 2)
5. Verify person's current location is correct
6. Select the Intended Destination from dropdown list, i.e. Temp Location from exercise 3
7. Click the **Register** and view message in red flashing text
8. Check box: Required fields are marked with * Check the Confirm Submission Without Required Fields
9. Click **Register**
10. Confirm message: Register is completed

Instructor Resources and Training Materials:

Slides # 49 – 50 (Master Trainer)

Slides # 42 – 43 (Facility Trainer)

See eFINDS_QuickReferenceCard

Instructor Tips:

This exercise registers the second person with minimal patient info.

Verify barcode number was entered correctly and patient tracking has not been overwritten.

When registering this person, and skipping the DOB and gender, demonstrate the missing info/Confirm Submission without required field's message and how it affects the action buttons available.

Exercise 7: Updating Single Person with Scanner (U-1)

Learning Objectives:

Successfully update a person with a scanner.

Training Scenario:

Some time has passed since you registered the person in the last exercise. In that time, you have obtained the person's date of birth and gender. You need to re-open the person's eFINDS™ record and insert this information.

Learning Methodology:

Through experiential learning the trainer will guide participants through an exercise by instructing them to:

1. Click **Register People** and scan the barcode for the person you just registered without a DOB or gender.
2. Enter the DOB and gender.
3. Click **Save Edits**.
4. Confirm message: **Edit is complete**

Instructor Resources and Training Materials:

Slides # 51 – 52 (Master Trainer)

Slides # 44 – 45 (Facility Trainer)

See eFINDS_QuickReferenceCard

Exercise 8: Shelter in Place (R-1, U-2)

Learning Objectives:

Demonstrate how to change a person's status to Shelter in Place.

Describe when it is appropriate to use the Shelter in Place status.

Describe how the eFINDS™ interface affects when Shelter in Place is available.

Training Scenario:

You now have a third person to register into eFINDS™. This person is on a ventilator powered by a generator. It is determined that this individual cannot be moved. An eFINDS™ wristband is on the person's wrist but you are unsure if the person has been registered. In this exercise you will register this person into eFINDS™ and set the person's status to Shelter in Place.

Learning Methodology:

Through experiential learning the trainer will guide participants through an exercise by instructing them to:

1. Click **Register People** > Scan or Type a barcode
2. Confirm: **Status Available**
3. Enter *First Name, *Last Name, *DOB (mm/dd/yyyy) & Select Gender
4. Enter reason for SIP in the Note section
5. Select or Verify **Evacuation Operation** (reason for evacuation in exercise 2)
6. Verify person's current location is correct
7. Select the Intended Destination from dropdown list, i.e. same as current location
8. Click **SIP**
9. Confirm message: **SIP** is completed.

Be sure to scroll down to the tracking history to show the person was registered and status changed to SIP simultaneously.

Instructor Resources and Training Materials

Slides # 53 – 54 (Master Trainer)

Slides # 46 – 47 (Facility Trainer)

Instructor Tips:

Facility Shelter-In-Place Consideration

For the purpose of NYSDOH evacuation planning and incident management, SIP policy and process (2016) the potential to SIP is defined as: The ability of a NYSDOH regulated health care facilities (HCF)(hospitals, nursing homes, ACF,

etc.) to retain for at least 96 hours a small number of residents that are too critical to be moved or where moving them may have a negative health outcome, while the remainder of the facility is evacuated, in accordance with a mandatory evacuation order by a local chief elected official that includes an option to SIP.

HCFs and agencies should appreciate that as defined, SIP represents an unusual incident related action which permits the HCF to remain in an active hazard zone. This action can place the facility's patients/residents and staff at considerable risk. As such SIP does not represent business as usual and should be differentiated from defending in place or "hunkering down" during a storm. SIP must also be differentiated from staying put simply because a HCF ran out of time to conduct necessary evacuation procedures during the appropriate pre storm period.

NYSDOH reviews all materials in the Profile Application, and any other information deemed appropriate, and may conduct outreach to health care as part of the review to determine a facility's pre-storm season potential eligibility to SIP during the current Atlantic Hurricane Season. If authorized, the SIP option would be in place for those patients/residents, as described above and in the Profile Application, that facility leadership judge to be at greater risk if transferred/transported than if they SIP. Phase specific details are outlined below.

SIP is contingent on the Chief Elected Official of a jurisdiction issuing a Mandatory Evacuation order that includes a HCF SIP option to remain in a defined evacuation zone, is incident specific and requires explicit consent of NYSDOH.

Exercise 9: Deceased Person (U-3)

Learning Objectives:

By the end of this exercise participants will be able to demonstrate:

- how to cancel an action,
- how to indicate a person has expired,
- how the cancelled action appears in the tracking history, and
- how to view this information on the facility report.

Training Scenario:

The sheltered in place person on a ventilator has expired. You will need to mark the person's record to indicate that they are deceased.

Learning Methodology:

1. Click **Manage People > Person Lookup**
2. Scan or Type Barcode of person from exercise 5 (SIP) above
3. Click **Search**
4. Verify the correct person displays
5. Click **Cancel SIP**
6. Verify **Status Registered** and Cancel SIP is completed
7. Check the Deceased box and Enter the date and time of death in Note field
8. Click **Save Edits** and verify Edit is completed
9. View More Info from Tracking History to see the notes

View how info displays in report:

1. **Click Reports > Facility Report**
2. Verify Location and Operation
3. Click **Generate Report**
4. View report and Deceased field = true.

Instructor Resources and Training Materials:

Slides # 55 – 57 (Master Trainer)

Slides # 48 – 50 (Facility Trainer)

See PDF file: eFINDS_QuickReferenceCard

Instructor Tips:

If a person dies before being evacuated, then be sure that their status is Registered and the check box for deceased is checked.

If a person who was evacuated to a receiving facility dies, then check the deceased box and change their status to Will Not Repatriate.

View Tracking History after step 6 to demonstrate the Show Detailed History check box. By default the cancelled actions do not display in the Tracking History until box is checked.

Also hover over the corresponding question mark to reveal the help text.

Then expand the More Info caret to reveal the contents of the Note Section.

Only the facility report displays the deceased check box being checked (true) or not checked (false).

Caution: Cancel Action will undo what was previously entered into the Note field, therefore cancel action such as SIP before updating notes.

Exercise 10: Change Status to Evacuated (U-4)

Learning Objectives:

Demonstrate how to evacuate a person by changing their status to Evacuated.

Training Scenario:

It is time for the two people registered in exercises 5 and 6 to be moved from your facility to the temporary location. In this exercise you will re-open their records and set their status to Evacuated.

Learning Methodology:

1. Click **Manage People > Person Lookup**
2. Scan Barcode > Click **Search**
3. Verify person is correct
4. Click **Evacuated**
5. Confirm message: Receive is completed & Status: **Evacuated**
6. Repeat steps 1 – 5 for second person, but in Step 2 Type in barcode number.

Instructor Resources and Training Materials:

Slides # 58 – 59 (Master Trainer)

Slides # 51 – 52 (Facility Trainer)

See PDF file: eFINDS_QuickReferenceCard

Exercise 11: Change Status to Received (U-5)

Learning Objectives:

Demonstrate how to change a person's status to Received and update their location to the receiving/temp location.

Training Scenario:

The people registered in exercises 5 and 6 and evacuated from your facility in exercise 10 have arrived at the temporary location and need to be received. You will receive them into the Temp Location (current location) by scanning a wristband and by typing the second barcode in.

Learning Methodology:

1. Click **Manage People > Person Lookup**
2. Scan or Type Barcode > Click **Search**
3. Change Current Location Org. Type (TMP) & Current Location to the Temporary Location
4. Click **Receive**
5. Confirm message: Receive is completed & Status: **Received**
6. Repeat steps 1 – 5 for second person

Instructor Resources and Training Materials:

Slides # 60 – 61 (Master Trainer)

Slides # 53 – 54 (Facility Trainer)

See PDF file: eFINDS_QuickReferenceCard

Instructor Tips:

There are multiple way to change the status of a person. This method demonstrates changing status one person at time.

Exercise 12: Initiate Repatriation Using the Multi Person Update (U-5)

Learning Objectives:

Demonstrate how to initiate repatriation when it is time to send a person back to their original facility.

Demonstrate how to take actions for groups of people through the multi person update feature.

Training Scenario:

Power has been restored at your facility and people can be returned. You will need to begin the process of sending the people you registered in exercises 5 and 6 by initiating repatriation.

Learning Methodology:

1. Click **Manage People > Multi Person Update**
2. Select Operation, Original location org. type and location
3. Select Action: **Initiate Repatriation**
4. Click **List**
5. Select people with check/click OR select all by checking box in column heading
6. Click **Initiate Repatriation of Selected**
7. Verify Initiate Repatriation completed for two people.

Instructor Resources and Training Materials:

Slides # 62 – 63 (Master Trainer)

Slides # 55 – 56 (Facility Trainer)

See PDF file: eFINDS_QuickReferenceCard

Instructor Tips:

Initiate Repatriation is only available if Intended Location equals Original Location.

Exercise 13: Change Status to Repatriated (U-6)

Learning Objectives:

Demonstrate how the evacuating facility will receive their people back and change their status to Repatriated when the operation is over.

Training Scenario:

The people you registered in exercises 5 and 6 have returned to your facility. You will need to indicate that they have arrived by changing their status to Repatriated.

Learning Methodology:

1. Click **Manage People > Multi Person Update**
2. Select Operation, Original location org. type and location
3. Select Action **Repatriate**
4. Click **List**
5. Select people with check/click OR select all by checking box in column heading
6. Click **Repatriation of Selected**
7. Verify Repatriation completed for two people

Instructor Resources and Training Materials:

Slides # 64 – 65 (Master Trainer)

Slides # 57 – 58 (Facility Trainer)

See PDF file: eFINDS_QuickReferenceCard

Instructor Tips:

Status of Repatriated will only be available if the Original Facility equals the current location.

Exercise 14: Review the Facility Report (S-1)

Learning Objectives:

Demonstrate how the evacuating facility can review current location, status and other details about for an identified operation.

Training Scenario:

People have been repatriated and you would like to confirm that all statuses and current locations are up to date and correct.

Learning Methodology:

1. Click **Reports > Facility Report**
2. Verify Location and Operation
3. Click **Generate Report**
4. Verify two people have been Repatriated and current location is original location.

Instructor Resources and Training Materials:

Slides # 66 – 67 (Master Trainer)

Slides # 59 – 60 (Facility Trainer)

Instructor Tips:

This report can be exported to excel or pdf, but report requires an operation. If you want to view people for multiple operations, then use the List People.

Exercise 15: Evacuating Facility Prepares for an Evacuation by Downloading the Barcode Assignment: Uploadable Spreadsheet (R-3a, R-3b)

Learning Objectives

Demonstrate how the evacuating facility's eFINDS Reporting Administrator can download the Barcode Assignment: Uploadable Spreadsheet, save it with the evacuee's info and upload it to eFINDS to register the people in the system.

Training Scenario:

A Hurricane is making its way east, therefore your facility is preparing to have a full facility evacuation. The exact path of the hurricane is still not determined as it is still five days out.

If full facility is evacuation is warranted the facility would like to utilize the eFINDS Spreadsheet. For demonstration purposes we will only input info for two people using this method.

The Operation had been created by NYS call <current date> HURRICANE TEST
NYS

Learning Methodology:

1. Click **Manage Barcodes > Download Barcode Documents**
2. Enter Start & End Barcode Number (optional)
3. Select Barcode Assignment: Uploadable Spreadsheet (excel)

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4. Click **Download Document**
5. Click **Save** and Open NYS_eFINDS_<facility ID Date Time>_Training
6. Populate First Name, Last Name, DOB and Gender
7. **Save file** to network or desktop
8. **Print** file (optional, but recommended).

Upload file to eFINDS Practice Only:

9. Click **Register People > File Upload**
10. Select **Operation** <current date> HURRICANE TEST NYS
11. Click recycle icon, if operation does not display
12. Locate Excel file with saved person information (NYS_eFINDS file name with facility id, date and time)
13. Click **Open** to add file
14. Click **Upload**
15. Verify Info is correct, and edit if necessary
16. Click **Register**
17. Verify message: Registered two people.

Note: If Excel file has no person info, then the file cannot be uploaded. OR if barcode does not have a person affiliated with a barcode, then barcode will remain available.

Remember: The role of eFINDS Data Reporter cannot download the spreadsheet, but they can maintain it on their network and upload it when the operation is created or made active.

Instructor Resources and Training Materials:

Slides # 68 – 70 (Master Trainer)
Slides # 61 – 63 (Facility Trainer)

Instructor Tips:

Create an operation that you can use for all of your trainings. Change “Test” for location to something that differentiates your trainings from others.

eFINDS downloads can be saved to network using any file name. You no longer need to keep the name from the eFINDS system. Do not add extra fields to spreadsheet. Upon entering data, print copies of the spreadsheet for your records.

Note: The system defaults to the FIRST available unused barcode in your sequence. If Excel file has no person info, then the file cannot be uploaded. OR if barcode does not have a person affiliated with a barcode, then barcode will

remain available. If you use this process you need to ensure that the wristbands placed on the patients match the barcode numbers on the spreadsheet.

Remember: The role of eFINDS Data Reporter cannot download the spreadsheet, but they can maintain it on their network and upload it when the operation is created or made active.

Exercise 16: Evacuating Facility Updates Intended Destination Using Multi Person Update and Evacuates the People (U-1, U-7)

Learning Objectives:

Demonstrates how the evacuating facility can update multiple records to include the intended destination and change status to Evacuated.

Training Scenario:

The file uploaded in exercise 16 will automatically assign the people to an operation and update the status to Registered, but they will still need to be assigned to an Intended Destination and be evacuated.

For practice purposes, please send your people to the Temp. Location created in scenario 3.

Two people are ready to be evacuated.

Learning Methodology:

1. Click **Manage People > Multi Person Update**
2. Select Operation, Original location org. type and location
3. Select Action **Evacuate**
4. Click **List**
5. Select people with check/click OR select all by checking box in column heading
6. Select Intended Destination Org Type & Intended Destination
7. Click **Evacuate Selected**
8. Verify Evacuation completed for two people.

Instructor Resources and Training Materials:

Slides # 71 – 72 (Master Trainer)

Slides # 64 – 65 (Facility Trainer)

Exercise 17: Review List People Report (S-2)

Learning Objectives:

Demonstrate how the evacuating facility can quickly view all of their people in eFINDS regardless of an operation.

Training Scenario:

Upon evacuation of multiple people you want to view all of the people in eFINDS, their status, and current location.

Learning Methodology:

1. Click **Manage People > List People**
2. Select Facility, if necessary
3. Click **List**

Instructor Resources and Training Materials:

Slides # 73 – 74 (Master Trainer)

Slides # 66 – 67 (Facility Trainer)

Instructor Tips:

This report cannot be exported.

The report displays people from multiple operations.

Exercise 18: Register a Person Using List Available Barcodes (R-5)

Learning Objectives:

Demonstrate how the evacuating facility can register/evacuate people without having the wristbands to scan.

Training Scenario:

Transportation is ready to leave.

Another person arrives to the Evacuation Station without a wristband.

This person is going to the TMP Location and will need insulin at a specific time.

Learning Methodology:

1. Click **Register People > List Available Barcodes**
2. Select facility, if necessary
3. Click **List**
4. Click Barcode link
5. Enter *First Name, *Last Name, *DOB (mm/dd/yyyy) & Gender
6. Add in the **Note section** that the person needs insulin at a specific time

7. Select or Verify Evacuation Operation
8. Select the Temp Location as Intended Destination
9. Click **Evacuate**
10. Verify Status: Evacuated

Instructor Resources and Training Materials:

Slides # 75 – 76 (Master Trainer)

Slides # 68 – 69 (Facility Trainer)

Instructor Tips:

Available barcodes have a status of Available so be sure to note the wristband being assigned. Also, be sure to select the proper action button (evacuate) according to the person's status.

Exercise 19: Quick Search (S-3)

Learning Objectives:

Demonstrate the Quick Search feature to find a person with minimal search criteria.

Training Scenario:

Some time has passed and you are concerned about the evacuated person who needed insulin at a specific time.

You want to know if they have been received in at the TMP Location.

You have forgotten the person's name and barcode #.

Learning Methodology:

1. Click **Quick Search** from eFINDS menu bar
2. Enter search criteria in the Quick Search box, e.g., partial first, last name, barcode or contents of Note field
3. Click **Search**
4. Verify: Found # person for the keyword(s): 'search criteria' Please select one to view details.
5. Locate the record to be viewed or updated
6. Click the Barcode link
7. View record and add the necessary information into Note field (optional)
8. Click appropriate action button (Save Edits).

Instructor Resources and Training Materials:

Module 4: Hands-on eFINDS™ Training

Slides # 77 – 78 (Master Trainer)

Slides # 70 – 71 (Facility Trainer)

Instructor Tips:

Only two characters are needed to do a quick search. Search for content in the Medical Info, Note section as well all info entered on the right side of the patient info area.

Upon completing step 8, view the person's tracking history to view content of Note field.

Remember: If a person did not originate from your facility, been received or intended to come to your facility, the person's info will not display.

Exercise 20: Register a Person Using the Multi Person Input (R-4)

Learning Objectives:

Demonstrate how the evacuating facility can input one or more people without having wristbands to scan using the Multi Person Input to get the next available barcode or barcodes.

Training Scenario:

The Director of Nursing hands you a medical record, and asks you to register this person into eFINDS.

Currently, the Intended Location has not been determined.

There are no wristbands to scan.

Learning Methodology:

11. Click on **Register People > Multi Person Input**
12. Select Evacuation Operation > Sending Location Org. Type > Location
13. Enter number of People/Barcodes needed
14. Click **Generate Fillable Grid**
15. Enter known information, such as name, DOB and gender
16. Click **Register**
17. Verify message: Registered # people and note barcode #s assigned
18. Note barcode # assigned to person.

Instructor Resources and Training Materials:

Slides # 79 – 80 (Master Trainer)

Slides # 72 – 73 (Facility Trainer)

Instructor Tips:

Only eFINDS Reporting Administrator can perform this function and would generally be used for registering multiple people when you do not have wristbands or barcodes to scan. For demonstration purposes, you will only register one person using this method.

This method registers the person, but the intended destination is not chosen at this time. Recommend the Multi Patient/Resident Update to update intended destination for more than one person (see Exercise 16).

There is no export function for this features, so suggest that the page is printed.

Be aware if you have multiple attendees from the same facility, they will need to coordinate who registers a person using a specific barcode.

Suggest that then request multiple bar codes needed, and then each participant select on unique one from the list.

If this feature is used by multiple eFINDS Reporting Admins at the same time, the person info will be overwritten and accurate reporting will not be available.

Exercise 21: As a Receiving Facility (TMP Location), Determine How Many People Are Intended to Come to Your Facility (S-4)

Learning Objectives:

Demonstrate how a receiving facility can utilize Locate People to see who has your facility in the Intended Destination field.

Training Scenario:

You are located at the Temporary Location.

You are waiting for people to arrive and would like to see how many people have been registered and have your Temp. Location in their Intended Location field. In other words, you want to know how many people to expect.

Learning Methodology:

1. Click **Locate People** from eFINDS menu bar
2. Enter the Intended Destination Org. Type as TMP Temporary > and select Temp. Location from scenario 3
3. Select Operation "HURRICANE TEST NYS"
4. Click **Search**
5. View search results, including current location, intended location and status.

Instructor Resources and Training Materials:

Slides # 81 – 82 (Master Trainer)

Slides # 74 – 75 (Facility Trainer)

Instructor Tips:

If you are affiliated with one facility, then you will only see results for the people who originated from your facility. People being evacuated to the temp location from other facilities will not display.

Exercise 22: Update Current Location and Status to Received (U-4)

Learning Objectives:

Demonstrate how a receiving facility can update the location and the status of multiple people without having a scanner.

Training Scenario:

Transportation has just arrived and evacuees are coming in. You are handed a PDF Scannable Log, but you do not have a scanner. The log includes names, DOB and gender and the employees who arrived with the evacuees took

attendance while in route. You count the people and it matches the number on the log.

Learning Methodology:

1. Click **Manage People > Multi Person Update**
2. Select Operation, Current location org. type (TMP Location) and location
3. Select Action **Receive**
4. Click **List**
5. Select people with check/click OR select all by checking box in column heading
6. Click **Receive Selected**
7. Verify Receive completed for # people.

Instructor Resources and Training Materials:

Slides # 83 – 84 (Master Trainer)

Slides # 76 – 77 (Facility Trainer)

Instructor Tips:

Now that all evacuees are received, when the operation is over, change status to Initiate Repatriation.

When the evacuees arrive back to the original facility, change their status to Repatriated using whatever method or eFINDS function desired.

Exercise 23: Inactive Operation and Temporary Location (A-5)

Learning Objectives:

Demonstrate how an evacuating/sending facility would update the operation and temporary location so they no longer appear in the dropdown lists.

Training Scenario:

Power has been restored, and all of the evacuees have been repatriated.

You need to inactive both the operation and temporary location.

Learning Methodology:

Inactive Operation:

1. Click **Admin** from the menu bar
2. Click **Manage Operations**
3. Search Operation
4. Click Operation Name from list
5. Change Status to Inactive
6. Click **Save Operation**.

Inactivate Temp. Location:

1. Click **Admin** from the menu bar
2. Click **Manage Locations**
3. Search for the location by sorting column headings by Name, Description, Address, County, Phone Created by, Agency or Updated by
4. Click Location Name from list
5. Change Status to Inactive
6. Click Save Location

Once the Operation and Temp location are inactivated, they will not be available for selection or appear in reports.

Instructor Resources and Training Materials:

Slides # 85 – 86 (Master Trainer)

Slides # 78 – 79 (Facility Trainer)

Instructor Tips:

By inactivating the operation and temp location, they will no longer be available for reporting or appear in the drop down list.

Lunch

Duration: 60 minutes

Module 5 Teach Back (Facility Trainers Should Skip This Module and Proceed to FAQ Slides)

A Master Trainer should teach this module to all facility trainers.

Duration: 180 minutes (Based on 20 participants)

Goal of Module:

To allow participants the opportunity to practice teaching to ensure competency

Learning Objectives:

By the end of Module 5 participants will be able to confidently teach a section of curriculum.

Training Methodology:

Teach Back Exercise

Distribute to each participant, either on an index card or a sheet of paper, one “hands on” exercise from Module 4 and ask them to teach back to the class. (10 minutes/participant)

Distribute a copy of Framework for Evaluation to a couple of participants and ask them to complete the “Teach Back Evaluation Comments” of trainer’s skill for each of the 5 performance criteria on Matrix. The completed comment forms should be provided to the person at the end of their teach back. This Framework is intended to provide constructive feedback to each facility trainer.

Instructor Resources and Training Materials:

Framework for Evaluation of Teach Back (Appendix H)

Instructor Tips:

Learning is enhanced when participants have an opportunity to practice what they have learned

Appendix A: eFINDS Evaluation

1. Instructor was well prepared and demonstrated subject matter competency
 - Strongly agree
 - Somewhat agree
 - Neither agree nor disagree
 - Somewhat disagree
 - Strongly disagree

2. Instructor presented in a manner that facilitated learning
 - Strongly agree
 - Somewhat agree
 - Neither agree nor disagree
 - Somewhat disagree
 - Strongly disagree

3. Instructional materials (handouts, visual aids, etc.) were used effectively
 - Strongly agree
 - Somewhat agree
 - Neither agree nor disagree
 - Somewhat disagree
 - Strongly disagree

4. Participation and interaction were encouraged
 - Strongly agree
 - Somewhat agree
 - Neither agree nor disagree
 - Somewhat disagree
 - Strongly disagree

5. Training objectives were clear and concise
 - Strongly agree
 - Somewhat agree
 - Neither agree nor disagree
 - Somewhat disagree
 - Strongly disagree

Appendix A: eFINDS Evaluation

6. Course materials were easy to access

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

7. Physical facility provided a suitable setting for learning

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

8. This training is worth recommending to other colleagues

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

9. Please indicate your knowledge and/or skill level (in relation to the subject matter presented) BEFORE this course

- Very low
- Low
- High
- Very High

10. Please indicate your knowledge and/or skill level (in relation to the subject matter presented) AFTER this course

- Very low
- Low
- High
- Very High

11. This training content will positively impact the role I play in the evacuation of people in my facility

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

12. The knowledge/skills gained by this training will positively impact the tracking people during an evacuation in my facility

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

13. The information I received will prepare me to train staff at my facility

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Not applicable

14. Overall, training met my needs and expectations

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

Appendix A: eFINDS Evaluation

15. What is your position/title?

16. What is your professional training?

17. Additional comments/suggested improvements:

Appendix B: eFINDS Reporting Administrator

Individuals in this role can enter information for their facility and some additional information:

- Register people with or without scanner
- Register people one at a time or upload the eFINDS spreadsheet
- Change a person's status one at a time or multiples
- Generate Barcode Assignment: Scannable Log (PDF log) or Download or Upload Spreadsheet (excel)
- Register multiple people without having barcodes to scan using the Multi Person Input

Appendix C: eFINDS Master Trainer verifies eFINDS role assignment

Trainer will need the HCS User ID of each participant

1. Click **My Content > All Applications > Letter "R"**
2. Click **Role Lookup Tool** (Communications Directory) from the Application Name list
3. Enter User ID in the Search for Person by User ID
4. Click **Submit**
5. Verify registered attendee is in the role of eFINDS Reporting Administrator

Appendix D: eFINDS Data Reporter

Individuals in this role can enter information for their facility:

1. Register people with or without scanner
2. Register one at a time or upload the eFINDS Spreadsheet (excel)
3. Change a person's status with or without scanner
4. Change a person's status one at a time or multiples

Appendix E: HCS Coordinator links user ID to an eFINDS role

1. Click **Coordinator's Update Tool** (left side panel under My Applications)
2. Select your **facility**
3. Click Manage Role Assignments (blue tab)
4. Click the Modify link to the right of the role, such as eFINDS Data Reporter OR eFINDS Reporting Admin.

IMPORTANT: Administrator role has higher permissions so there is no reason to add a user to both roles. (Click role name for role description)

1. Check the box next to the person you want to add to the role*
2. Click the **Add to Role** button.

* If you are trying to assign a person with an existing HCS account user with another primary organization proceed to the last option (3 or 4) on the role assignment page. Enter the last name of the person and click submit. When the results display select the name of the person with the correct organization and User Id.

Note: Assigning a role to an "NA" account (John Doe na, Facility) does not grant permissions to eFINDS.

Appendix F: eFINDS Planning Considerations Checklist

___ Each your facility has an eFINDS policy/procedure that:

- addresses different circumstances/scenarios
- incorporates into evacuation protocols
- are customized to their facility

___ Ensure patient/resident/family education/guidance on the evacuation process is outlined/ready:

- Importance of wristband; reassurance of how it will help to keep them safe; how they, and their belongings will easily be tracked wherever they move; security of the system regarding their personal information
- Drill various scenarios and test policy/protocols
- Include in annual evacuation drill
- Work with neighbor/sister facilities
- Act in both sending and receiving roles

___ Ensure adequate (24/7) capacity/coverage (not just one) of staff on every shift trained in using the eFINDS system and WHO):

- Know the facility eFINDS and evacuation protocols
- Know and have 24/7 access to the location of eFINDS supplies/scanner!
- Have active HCS accounts and are assigned to eFINDS roles for each licensed entity/facility in a given location
- Know how to create an "operation" for a facility based/localized event
- Know how to register/receive evacuees under different circumstances e.g., with/without power or internet access; paper log, scanner, multi-evacuee upload or receiving processes
- Know the priority is to wristband evacuee
- Know, never to remove eFINDS wristband until evacuee is a their *permanent* location

___ Determine what should happen if the power goes out before or while people are being registered in eFINDS

Appendix F: eFINDS Planning Considerations Checklist

- Do you have enough of the paper backups on the unit and to send to the receiving facility?
- Do you have the downloadable spreadsheet incorporated into your operation?
- Would you manage this by unit?

____ Ensure Internet access is available Wi-Fi devices

- Computers or mobile devices available and charged? Extra charged batteries?

____ Determine if any medical information is going to be entered into the notes fields in eFINDS

____ Determine if you are going to scan your facility wristband into the notes field of eFINDS application to capture your facility's barcode ID#

- May or may not be your MR# - now is the time to find out

____ Determine if you have prepared stickers with eFINDS unique barcode handwritten on sticker to apply to the patient's/resident's charts and other belongings

____ Determine if you have identified staff in charge of monitoring movement of people through receipt by receiving facility using eFINDS tracking search and dashboard functions

Appendix G: Recommended Functions for Registering

Recommended Functions for Registering and Receiving Patients/Residents															
	Small Facility	Large Facility	Few floors & compact layout of rooms	Many floors and wings, large area	Small number of staff	Larger number of staff organized by different care service	Infrequently Changing (Stable) Patient/Resident Population	Frequently Changing Patient/Resident Population	Large percentage of low mobility patients/residents	Power	No Power	With Scanner or mobile device	Without scanner or mobile device:	Urgent Evacuation	Non-Urgent, planned evacuation
Functions: Functions for registering patient/resident for evacuation at the sending facility															
R1. Scan barcode from bracelet or printed barcode log	X		X		X			X		X		X			X
R1. Scan barcode from printed barcode log	X		X		X		X	X		X		X			X
R2. Manually enter barcode number in system	X		X				X	X		X			X		X
Manually enter patient data directly on printed barcode log	X		X		X			X	X		X		X	X	
R3. Register single patient/resident without barcode or scanner	X		X		X			X		X			X		X
R4. Register Multiple Patients/Residents Using On-Screen Table	X	X			X			X	X	X			X	X	
R5(a) – 5(d). Register patients with Fillable Spreadsheet for Upload;	X	X			X		X		X	X			X	X	
	Small Facility	Large Facility	Few floors, compact layout of	Many floors, and wings,	Small number of staff	Larger number of staff organized	Large percentage of low mobility	Power	No Power	With Scanner or mobil	Witho ut scanner or	Urgent Evacuatio n	Non-Urgent, planned evacuati		
Functions: Functions for updating patient's/resident's current location at the receiving facility															
U1. Updating Single Patient/Resident with Scanner by scanning barcode from barcoded bracelet or printed barcode log	X		X		X		X	X	X	X			X		
U2 Update Single Patient/Resident without Scanner	X		X	X	X	X	X		X		X		X		
U3 Update group of Patients/Residents		X		X	X	X	X	X			X	X			

Appendix H: Framework for Evaluation of Teach Back

Use this framework to evaluate your colleagues on their teach back and to also help you prepare for your teach back. Use the comments form that follows to provide feedback to your colleagues.

Skill level Performance Criteria	Emerging	Developing	Advanced
1. Followed curriculum	Deviated significantly from the prescribed curriculum. May have introduced fallacies or other inaccuracies to the material. Did not execute hands on exercises as designed.	Made minor changes to curriculum in an insignificant way. Executed hands on exercises as designed, did not introduce any inaccuracies to the material.	Adhered strictly to the curriculum or made changes that demonstrated a clear internalization of the material and did not significantly alter the material. Introduced no inaccuracies and executed hands on exercises explicitly as designed.
2. Topic Knowledge	Student does not have grasp of information; student cannot answer questions about the subject. Inaccurate, generalized, or inappropriate information provided.	Student has a partial grasp of the information. Student is at ease with expected answers to all questions but fails to elaborate. Over dependence on notes may be observed.	Student has a clear grasp of information. Student demonstrates full knowledge (more than required) by answering all class questions with explanations and elaboration. Speaking outlines are used for reference only.

Skill level Performance Criteria	Emerging	Developing	Advanced
3. Audience Adaptation	The presenter is not able to keep the audience engaged. The verbal or nonverbal feedback from the audience may suggest a lack of interest or confusion. Hands on exercises are not well executed.	The presenter is able to keep the audience engaged most of the time. When feedback indicates a need for clarification, the speaker makes an attempt to clarify. Generally, the speaker demonstrates audience awareness through nonverbal and verbal behaviors. Hands on exercises are handled with a minimum of difficulty.	The presenter is able to effectively keep the audience engaged. Material is modified or clarified as needed given audience verbal and nonverbal feedback. Nonverbal behaviors are used to keep the audience engaged. Delivery style is modified as needed. Hands on exercises are handled with ease.
4. Language Use (Verbal Effectiveness)	Language choices may be limited, peppered with slang or jargon, too complex, or too dull. Language is questionable or inappropriate. Some biased or unclear language may be used.	Language used is mostly respectful or inoffensive. Language is appropriate, but word choices are not particularly vivid or precise.	Language is familiar to the audience, appropriate for the setting, and free of bias; the presenter may "code-switch" (use a different language form) when appropriate. Language choices are vivid and precise.

Skill level Performance Criteria	Emerging	Developing	Advanced
5. Delivery (Nonverbal Effectiveness)	<p>The delivery detracts from the message; eye contact may be very limited; the presenter may tend to look at the floor, mumble, speak inaudibly, fidget, or read most of the speech; gestures and movements may be jerky or excessive. The delivery may appear inconsistent with the message. Nonfluencies (“ums”) are used excessively. Articulation and pronunciation tend to be sloppy. Poise of composure is lost during any distractions. Audience members have difficulty hearing the presentation.</p>	<p>The delivery generally seems effective – however, effective use of volume, eye contact, vocal control, etc. may not be consistent; some hesitancy may be observed. Vocal tone, facial expressions, and other nonverbal expressions do not detract significantly from the message. The delivery style, tone of voice does not seem out-of-place or disrespectful to the audience or occasion. Some uses of nonfluencies are observed. Generally, articulation and pronunciation are clear. Most audience members can hear the presentation.</p>	<p>The delivery is extemporaneous -- natural, confident, and enhances the message – posture, eye contact, smooth gestures, facial expressions, volume, pace, etc. indicate confidence, a commitment to the topic, and a willingness to communicate. Limited use of nonfluencies is observed. Articulation and pronunciation are clear. All audience members can hear the presentation.</p>

Teach Back Evaluation Comments

Instructor:

Followed Curriculum:

Topic Knowledge:

Audience Adaptation:

Language Use(Verbal Effectiveness):

Delivery (Nonverbal Effectiveness):

Simplicity

Clarity

Brevity

Teach Back Evaluation Comments

Instructor:

Followed Curriculum:

Topic Knowledge:

Audience Adaptation:

Language Use(Verbal Effectiveness):

Delivery (Nonverbal Effectiveness):

Teach Back Evaluation Comments

Instructor:

Followed Curriculum:

Topic Knowledge:

Audience Adaptation:

Language Use(Verbal Effectiveness):

Delivery (Nonverbal Effectiveness):

Simplicity

Clarity

Brevity

Teach Back Evaluation Comments

Instructor:

Followed Curriculum:

Topic Knowledge:

Audience Adaptation:

Language Use(Verbal Effectiveness):

Delivery (Nonverbal Effectiveness):

Teach Back Evaluation Comments

Instructor:

Followed Curriculum:

Topic Knowledge:

Audience Adaptation:

Language Use(Verbal Effectiveness):

Delivery (Nonverbal Effectiveness):

Simplicity

Clarity

Brevity