

A stylized illustration of a person in a suit, rendered in shades of blue and yellow. The person is shown from the chest up, looking down at a large document or book they are holding. The background is a solid yellow color. The overall style is graphic and modern.

**Evacuation of Facilities in Disaster Systems (eFINDS)  
Master Trainer and Facility Trainer  
Curriculum**

**November 2015**

**Version 1.1**

# 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 (5) 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 8 hour curriculum is designed for approximately 20 facility trainers. When providing training to facility staff the curriculum is approximately 4 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 patients/residents.
- 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 6 weeks prior to training

- Download all training material from the NYSDOH Health Commerce System (Go to My Content >Documents by Group >Hospitals > Preparedness >E-FINDS > eFINDS Train the Trainer folder)
- 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 >Documents by Group >Hospitals > Preparedness > E-FINDS > eFINDS Train the Trainer folder)
- 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 6 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-500 eFINDS on the LMS [www.nylearnsph.com](http://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](mailto: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
  - Print "Paper Patients" with name, date of birth (DOB) and gender
  - 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

**Direct eFINDS Technical Questions to:**

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**Module 1****Lesson Plan****Welcome, Introductions and Purpose of Training****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 1 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 Slides

**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

<b>Module 2</b>		<b>Lesson Plan</b>
<b>Introduction to eFINDS</b>	<b>Duration:</b> 20 minutes	
<b>Goal of Module:</b> To provide participants with an understanding of the how and why eFINDS was developed.		
<b>Learning Objectives:</b>  By the end of Module 2 participants will be able to: <ul style="list-style-type: none"> <li>• Identify the purpose and background of eFINDS</li> <li>• Describe key data and functional requirements of system</li> <li>• Understand the importance of utilizing eFINDS when evacuating</li> <li>• Understand the regulatory requirement for utilizing eFINDS when evacuating</li> <li>• Recognize implications of HIPAA in regard to data security sensitivity</li> </ul>		
<b>Training Methodology:</b> <ul style="list-style-type: none"> <li>• Didactic</li> </ul>		
<b>Instructor Resources and Training Materials:</b> <ul style="list-style-type: none"> <li>• Slides 3 - 11</li> </ul>		
<b>Instructor Tips</b>  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 patients/residents in the event of an evacuation.		
<b>Module 3</b>		<b>Lesson Plan</b>
<b>Planning Considerations</b> <b>Master Trainer Only</b> <b>(Facility Trainers see Module 3 below)</b>	<b>Duration:</b> 45 minutes	
<b>Goal of Module:</b> 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.		
<b>Learning Objectives:</b>  By the end of Module 3 participants will be able to: <ul style="list-style-type: none"> <li>• 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</li> </ul>		

- 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, patients/residents 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 # 12 - 34 (Master Trainer Slide Deck)
- Slides # 12 - 26 (Facility Trainer Slide Deck)
- Planning and Job Action Templates
- eFINDS Procedure Algorithm Flowchart Diagram
- New York State Department of Health (NYSDOH) Non-emergency eFINDS Request Process
- Facility eFINDS Planning Consideration Checklist (Appendix F )
- eFINDS Functions Matrix (Appendix G)

### **Instructor Tips:**

**Module 3**  
**Facility Trainer**

**Lesson Plan**

**Planning Considerations**

**Duration:**  
45 minutes

**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 # 22– 26
- Facility eFINDS Planning Consideration Checklist (Appendix F)
- Recommended Functions Matrix (Appendix G)

**Instructor Tips:**

**Module 4**

**Lesson Plan**

**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.

**Learning Objectives:**

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

- Create an operation/reason for evacuation
- Create a temporary location
- Register a patient/resident
- Receive a patient/resident
- Repatriate a patient/resident
- Generate reports
- Install eFINDS Mobile application

**Training Methodology:**

Trainer will guide participants through scenarios so they are able to practice the functionality of the system as well as gain an understanding of the features.

**Instructor Resources and Training Materials:**

- Slides # 35 – 69 (Master Trainer Slide Deck)
- Slides # 28 – 61 (Facility Trainer Slide Deck)

**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. 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 site. Alternatively, a wristband not ending in a D cannot be found in eFINDS Demo.

## **Administrative Exercise Event Administration**

### **Description of Scenario:**

- 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 patients/residents within the next two days.
- You need to begin use of eFINDS to track your evacuees for this emergency.
- Wristbands and scanner are located. Mobile devices may be used if available. Incident Commander requesting use of paper log for internal tracking purposes.
- Since this emergency only affects your facility you do not need to wait for DOH to create an operation for this event. Your eFINDS Reporting Administrator should create the eFINDS operation immediately.
- Your facility (Sending Facility) will be evacuating to a Temporary Location while you wait to move your patients/residents to another facility. You are not certain that this temporary location is currently listed in the eFINDS Demo System so you must first search for it and if it is not listed, add it.

## **Event Administration A-1 Mobile Application**

### **Learning Objectives:**

By the end of this scenario participants will be:

- Successfully able to install and uninstall eFINDS on their mobile device
- Successfully able to scan a training barcode

### **Learning Methodology:**

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

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

### **Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard-Mobile or see instructions location on screen at Step 5.

Instructions for using the Mobile eFINDS are on the desktop version of the eFINDS Mobile Download page.

**Instructor Tips:**

If a person is using eFINDS Mobile, they will be notified via email when mobile application updates are available. To update to the latest version a person will need to uninstall eFINDS and/or eFINDS Demo App and then download/reinstall the updated version of the App. The user will also be notified if using an outdated version.

**Event Administration**  
**A-2 Generate a Paper Log**

**Learning Objective:**

By the end of this scenario participants will be able to:

- Successfully print the barcoded PDF logs and document patient/resident name for each barcode

**Learning Methodology:**

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

**e-FINDS Administrator Role Only**

1. Log on to the HCS (<https://commerce.health.state.ny.us>). If you cannot remember your user id or password, please call Commerce Accounts Management Unit at 1-866-529-1890.
2. Click **eFINDS** Training (Demo) from your **My Applications** List.
3. Select your current location from the dropdown list.
4. Click **Manage Barcodes > Generate Barcodes Spreadsheet**.
5. Verify your current location.
6. Enter Start and End barcode numbers, e.g., 4–13 for ten patient/residents to be relocated OR leave blank for all assigned barcodes.
7. Select the PDF for the scannable barcode log.
8. Click **Generate**.
9. Print the PDF.

**Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

**Instructor Tips:**

If the barcode has already been used, then it will display BARCODE IS USED. Barcodes do not need to be used in order.

**Event Administration**  
**EXERCISE A-3 Create an Operation**

**Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully demonstrate how an evacuating facility's eFINDS Reporting Administrator will create an operation

**Learning Methodology:**

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

1. Click **Admin** from the menu bar.
2. Click **Manage Operations**.
3. Review the list of existing operations to avoid creating a duplicate.

If needed add a new operation:

4. Enter Operation Name and Description

***Naming Convention: Date (mm/dd/yyyy), type of event/emergency, (e.g. flood), and hospital (facility) name***

5. Select **Active Status** from dropdown list.
6. Enter Begin Date (mm/dd/yyyy) if other than current date.
7. Enter End Date (mm/dd/yyyy) if known.

8. Click **Add Operation**.

9. **Verify Saved operation.**

Email confirmation is sent to all **eFINDS Application Administrators**: eFINDS Operation has been added

**Instructor Resources and Training Materials**

- An Operation is the reason for the evacuation
- See PDF file: e-FINDS\_QuickReferenceCard-Operation

**Instructor Tips**

The Naming Convention for a Training Operation is:

- Date of the Operation in the following format: mm/dd/yyyy (In other words, one operation per training session)
- Brief description of the nature of the emergency, e.g., "flooding", "extended power loss", etc.

Location or facility name For example: 09/29/2015\_NoPower\_StFranHosp

The creation of this "training" Operation is specific to this training session

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 patient/resident Evacuation 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 A-4– Event Administration Create a Temporary Location**

#### **Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully search for an existing location or add a temporary location in the eFINDS system.

#### **Learning Methodology:**

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

#### **e-FINDS Administrator Role Only**

1. Click **Admin > Manage Locations.**
2. Enter Location Name (e.g. St Anthony’s), Description (e.g. Church), town or city (e.g. Albany) **Note:** this will display in Operation drop down list when registering a P/R.
3. Enter Description, Address, City, State, Zip, Phone and County.
4. Click **Add Location.**
5. Verify your temporary training location has been saved.

**Please Note: New TMP location names must be unique**

**Check list of existing TMP locations first**

#### **Instructor Resources and Training Materials:**

#### **Instructor Tips:**

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 (i.e.: 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**

**Duration  
15 minutes**

### **Registration Scenario**

Your facility begins preparing for evacuation by placing wristbands on 7 patients/residents and registers patient/resident in eFINDS Demo using the newly created operation and the newly created temporary location (TMP) as the intended receiving destination.

### **EXERCISE R-1: Register Single P/R with Scanner Sending Facility**

#### **Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully register patient/resident by scanning the barcode on the wristband when evacuation is necessary

#### **Learning Methodology:**

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

1. Scan the barcode OR Click **Register Patient/Resident > With Scanner.**
2. Confirm message: **Barcode is located. You can register a new Patient/Resident with it.**
3. Enter First Name, Last Name, DOB (mm/dd/yyyy) & Select Gender.
4. Verify Evacuation Operation is correct OR select other operation from list.
5. Verify Patient/Resident current location is correct.
6. Select the Intended Destination Org Type (Home, TMP, HO, NH, ACF) from dropdown list.
7. Select Intended Destination.
8. Enter Bulk Group; such as Bus # or transportation description.
9. Click the **Register button.**
10. Click **Override** button if required info is not entered.
11. Confirm message: **Patient/Resident info is updated.**

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

[Register 1 patient/resident using this process](#)

### **Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

### **Instructor Tips:**

Be careful not to over-write patient data by verifying message, "Barcode is located. You can register a new Patient/Resident with it"

Once a medical record or and employee number is entered (or skipped) by the sending facility, the MR/Employee number cannot be updated.

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

Required fields can be left blank by clicking the Override button to save the data.

## **EXERCISE R-2 - Register Patient/Resident Without Scanner Sending Facility**

### **Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully register patient/resident by typing the barcode from the wristband as evacuation is necessary

### **Learning Methodology:**

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

1. Click **Register Patient/Resident > With Scanner**.
2. Type barcode into **Scan or Enter Barcode** field.
3. Click **Submit**.
4. Confirm message: **Barcode is located. You can register a new Patient/Resident with it.**
5. Enter First Name, Last Name, DOB (mm/dd/yyyy) & Select Gender.
6. Verify Evacuation Operation is correct OR select other operation from list.
7. Verify Patient/Resident current location is correct.
8. Select the Intended Destination Org Type and Intended Destination from dropdown lists.
9. Enter Bulk Group; such as Bus # or transportation description.
10. Click the **Register button** OR Click **Override** button if required info is not entered.
11. Confirm message: **Patient/Resident info is updated.**

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Home, Register Patient/Resident (highlighted with a red box), Update Patient/Resident, Locate Patient/Resident, Dashboard, Admin, Mobile Download, and Exit. Below the navigation bar is a 'Quick Search' input field. The main content area features a blue header for 'Scan Barcode' and a white input field labeled 'Scan or Enter Barcode' with a red arrow pointing to it. A 'Submit' button is located to the right of the input field.

### Instructor Resources and Training Materials:

See PDF file: eFINDS\_QuickReferenceCard

### Instructor Tips:

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

## EXERCISE R-3 Register Single Patient/Resident without a Wristband/Barcode Sending Facility

### Learning Objectives:

By the end of this scenario participants will be able to:

- Successfully identify available barcodes
- Successfully register patients/resident without a scanner by using the barcodes available using the Multi Patient/Resident Input feature

### Learning Methodology:

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

1. Click on **Register Patient/Resident > Without Scanner.**
2. Verify Location Org Type/Facility Type.
3. Verify Facility name.
4. Click .
5. Locate and click on barcode number link.
6. Enter known information, such as name, DOB and gender.
7. Select Evacuation Operation.
8. Select the Intended Destination from dropdown list.
9. Enter Bulk Group; such as Bus # or transportation description.
10. Click the **Register button** or Click **Override** button if required info is not entered.
11. Confirm message: **Patient/Resident info is updated.**

### Instructor Resources and Training Materials:

See PDF file: eFINDS\_QuickReferenceCard

### Instructor Tips:

**Exercise R-4 Register Multiple Patients/Residents Using On-Screen Table  
(Multi Patient/Resident)  
Sending Facility**

**Learning Objectives:**

By the end of this scenario participants in the eFINDS Reporting Administrator role will be able to:

- Successfully register patients/residents by using barcodes available in the system and the eFINDS generated spreadsheet feature

**Learning Methodology:**

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

1. Click **Register Patient/Resident > Multi Patient/Resident Input**.
2. Select Evacuation Operation and Verify Current Location.
3. Select Intended Destination.
4. Enter the number of barcodes to be assigned.
5. Click **Generate Fillable Spreadsheet (Table)**.
6. Enter known information, such as first name, last name, date of birth (mm/dd/yyyy), and gender.
7. Click **Save all Patient/Resident**.
8. Verify message: **Successfully saved {correct # being evacuated} Patient/Resident** and click **barcode** to view or update the patient or resident information.

**Register 2 patients/residents using this process**

**Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

**Instructor Tips:**

- Only eFINDS Reporting Administrator can perform this function
- This is a quick way to register multiple patients/residents without having to use the override button for missing required fields, such as DOB
- This registering option allows the eFINDS Reporting Admin to enter patient information, operation and intended destination quickly
- If barcodes are distributed by floor or unit, then patient/residents have pre-assigned barcode numbers. The eFINDS system will give you all the available barcode numbers. Be sure to populate the patient/resident names that correspond to each barcode number. There is no report feature, so use the patient list.
- Be sure to review your entries before clicking the Save All Patient/Resident

button. Potentially you could overwrite another patient/resident record

### **EXERCISE R-5a Generate Fillable Spreadsheet for Upload Sending Facility**

#### **Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully download the barcode spreadsheet and upload the patient/resident information.

#### **Learning Methodology:**

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

1. Click **Manage Barcodes > Generate Barcodes Spreadsheet**
2. Verify or Select the current location
3. Enter the Number of Barcodes (optional)
4. Select EXCEL option button
5. Click **Generate** button
6. Save Excel spreadsheet to your network or desktop location

**DO NOT Change File Name**

#### **Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

#### **Instructor Tips:**

- Only eFINDS Reporting Administrator can perform this function
- A facility can prepare and maintain this spreadsheet incrementally when not in the midst of an emergency
- This process does not identify the intended destination for the evacuating patient/resident. Recommend the Multi Patient/Resident Update with the Update Type: Releasing Patient/Resident from this location. Include the Intended Destination Org Type, Intended Destination and Bulk Group (means of transportation) for getting evacuees to the receiving location.

#### **Important Reminder:**

- Do NOT change the name of the file generated.
- Do NOT upload file unless you are planning to evacuate. This file may be stored on your local or network and updated on a regular basis. If there is no information associated with a given barcode on the Excel spreadsheet then that barcode will remain available
- Do not enter Start or End Number if you want all available barcodes. Enter the last three digits of a barcodes in the Start and three digits in the End Number to specify a range of number.

### **EXERCISE R-5b Update/Maintain Spreadsheet Sending Facility**

#### **Learning Methodology:**

Through experiential learning the trainer will guide participants through an exercise

by instructing them to:

1. Locate/Open the spreadsheet from your desktop or network drive
  - a. (nys\_eFINDS file name with facility id, date and time).  
**DO NOT Change File Name**
2. Enable editing, if necessary.
3. Register 2 patients/residents by entering data onto spreadsheet.
4. Click Save.

### **Instructor Resources and Training Materials:**

#### **Instructor Tips:**

DO NOT Change File Name.

Do not add extra fields, as the spreadsheet can only upload P/R name, DOB and gender.

Upon entering the data, you can print a copies of the spreadsheet for your records.

**Note:** The system defaults to the FIRST available unused barcode in your sequence. If you use this process you need to ensure that the wristbands placed on the patients match the barcode numbers on the spreadsheet.

If a row is blank in the spreadsheet, the barcode will remain available.

### **EXERCISE R-5c: Upload Spreadsheet Sending Facility**

#### **Learning Methodology:**

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

1. Select or verify location.
2. Click **Register Patient/Resident > Patient Resident File Upload.**
3. Select Evacuation Operation and verify current location.
4. Click **Browse** button.
5. Locate Excel file with saved patient/resident information.  
(nys\_eFINDS file name with facility id, date and time)
6. Click **Open** to add file.
7. Click **Upload** button.
8. Verify Patient/Resident Info is updated, and Edit information if needed.
9. Click **Save All Patients/Residents.**

### **Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

#### **Instructor Tips:**

Either the eFINDS Data Reporter or the eFINDS Reporting Admin can upload the excel file.

P/R records can be amended on the screen during step 8 as needed.

If excel file has not P/R info, there is nothing to load. All barcodes will remain available.

Do NOT change the name of the file generated. Do NOT upload file unless you are planning to evacuate.

### **EXERCISE R-5d: Update Multiple Patients/Residents Spreadsheet with Intended Location Sending Facility**

#### **Learning Methodology:**

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

1. Click **Update Patient/Resident > Multi Patient/Resident Update.**
2. Verify your location.
3. Select the Action Type: **Releasing Patient/Resident From this Location**
4. Select the Intended Org Type (TMP) and Intended Destination.
5. Enter the Bulk Group, for example transport via bus.
6. Click **Load All Patient/Resident.**
7. Select All OR select Update for each patient/resident.
8. Click **Release Selected Patient/Residents.**
9. Verify Successfully updated {#} Patient/Resident

#### **UPDATE 2 PATIENTS/RESIDENT**

#### **Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard (page 2)

#### **Instructor Tips:**

- This feature allows the receiving facility to update Intended Destination, Change Operation or to see all P/R who still appear to be in transit to their receiving facility or P/R home.
- If an evacuating facility wants to see all of the patients that have not yet been received in by the receiving facility (location updated), then select Update Type "Release patient/resident from this location" and click **Load All Patient/Residents**. In the report display, focus on the Patient/Resident Location column. This will display all of the people that have not been "checked in" by the receiving facility. It will also display any individuals that went home to be with their families. The reason for this is because the family cannot check individual into their home-they are not a facility in the eFINDS system. Select all records or individual records and click **Release Selected Patient/Resident**.
- This feature can also be utilized for changing an Evacuation Operation by selecting the Update Type: **Change Operation for Patient/Resident at this Location.**
- If you only want to view the P/R records, then do not click the second button, e.g., **Release Selected P/R** or **Change Operation for Selected P/R.**

**LUNCH**

**Duration:  
60 minutes**

## Receiving/Updating P/R Scenario

- You are located at the Temporary Location (TMP) previously created by eFINDS Reporting Administrator.
- Patients/Residents begin arriving at this temporary location
- You have scanner to scan wristbands to check-in and update patient/resident location.

### EXERCISE U1: Updating Single P/R with Scanner Receiving Facility

#### Learning Objectives:

By the end of this scenario participants will be able to:

- Successfully update an individual patient/resident information with a scanner

#### Learning Methodology:

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

1. Click **Update Patient/Resident > With Scanner** from menu bar.
2. Scan barcode and click Submit, if necessary.
3. Confirm message: **Barcode is located. You can register new Patient/Resident with it OR Patient/Resident is found. You can update the information.**
4. Enter or confirm information, including Evacuation Operation and Patient/Resident Location.
5. Click **Update** or **Override** button.
6. Confirm message: **Patient/Resident info is updated.**

**RECEIVE/UPDATE 1 PATIENT/RESIDENT USING THIS PROCESS**

#### Instructor Resources and Training Materials:

eFINDS\_QuickReferenceCard

#### Instructor Tips:

For training purposes the temporary location is the receiving location

### EXERCISE U2: Update Single P/R without Scanner Receiving Facility

#### Learning Objectives:

By the end of this scenario participants will be able to:

- Successfully update an individual patient/resident location information without

a scanner

### **Learning Methodology:**

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

1. Click **Update Patient/Resident > Without Scanner** from menu bar.
2. Enter search criteria, such as last name, into Keyword search box.
3. Click **Search Patient/Resident by Keyword**.
4. Locate record to be updated.
5. Click on Barcode link.
6. Select facility in Patient/Resident Location list.
7. Enter other info if needed.
8. Click **Update Patient/Resident**.
9. Verify **Patient/Resident information is updated.**

**RECEIVE/UPDATE 1 PATIENT/RESIDENT USING THIS PROCESS**

### **Instructor Resources and Training Materials**

See PDF file: eFINDS\_QuickReferenceCard

### **Instructor Tips:**

This search feature will only work if the patient/resident was intended to come to your facility, otherwise you will need to scan or type the barcode into Quick Search

## **EXERCISE U3: Update Group of Patients/Residents Receiving Facility**

### **Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully update location information for multiple patients/residents without scanning the wristbands

### **Learning Methodology:**

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

1. Click **Update Patient/Resident > Multi Patient/Resident Update**
2. Verify location (TMP)
3. Select Action Type: **Checking in Patient/Resident From this Location, OR Change Operation for Patient/Resident at this Location**

Multi Patient/Resident Updates	
Location *	Internal Test Nursing Home #2[NH] ▼
Action Type *	Checking in Patient/Resident into this Location Checking in Patient/Resident into this Location Releasing Patient/Resident From this Location Change Operation for Patient/Resident at this Location

4. Click **Load All Patient/Resident**
5. Select All check box OR select Update box corresponding to the patients/resident that has arrived and needs location updated
6. Click **Check in Selected Patient/Resident**
7. Verify **Successfully updated {#} Patient/Resident.**

**RECEIVE/CHECK-IN 5 PATIENTS/RESIDENTS USING THIS PROCESS**

### **Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

### **Instructor Tips:**

This function can be used both by an Evacuating Facility, and a Receiving Facility.

- If a receiving facility wants to see all of the patients that are intended to come to their facility, they will select the Update Type "Checking in Patient/Resident into this location" and click **Load All Patient/Residents**. In the report that displays below, look in the Intended Dest column. This shows all of the patients/residents with their facility as the intended location that have not been received in or location updated yet. If you are ready to check the P/R in, then select all records or individual records and click **Check in Selected Patient/Resident**. If you are not ready to check in, then leave the page without clicking the Check in Selected P/R button.
- If an operation needs to be changed for a group of P/R, then select the "Change Operation for Patient/Resident at this location," and then click **Load All Patient/Residents**. Select the patients/residents that you need to change operation for or Select All, then select the Evacuation Operation from the list and click **Change Operation for Selected Patient/Resident**.

**Important to Note:** Once you click either the release, check in or change operation buttons, the records you updated with be removed from the display. **Keep in mind, this function is simply a way to update multiple patients/residents at one time.** If you do not proceed to clicking the Release, Check in or Change Operation buttons, then you can view the data without making any changes to the records. Receiving Facility selects *Check In* to view all patients/residents who are intended to come to their facility. An example of when to use the "Release" update is when you want to update the Bulk Group or means of transportation for getting to the receiving facility. The Multi Pat/Res Update can be used for repatriation also. In this case, the receiving facility will select the "Release" Update Type, click **Load All Patient/Residents**, select the P/R going back to their original location, and select the sending Facility/Original Locations as the Intended location.

## Repatriation Scenario

Event is over and the evacuated facility has been inspected and approved to repatriate their patients/residents

NOTE: another facility can be identified as the longer term location if the evacuated facility cannot reopen (mainly applies to nursing homes and adult care facilities)

Receiving facility (TMP) will update the intended location (originating facility or other) in the eFINDS record of each patient/resident from this operation

### EXERCISE Z1: Receiving Facility Repatriates

#### Learning Objectives:

By the end of this scenario participants will be able to:

- Successfully change intended destination to original sending facility name

#### Learning Methodology:

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

- Change intended destination with scanner, or
- Change intended destination without scanner, or
- Change intended destination with Multi Patient/Resident Update (Release)

**Update/Release 7 patients/residents using this process**

#### Instructor Resources and Training Materials:

See PDF file: eFINDS\_QuickReferenceCard

**Instructor Tips:** Pick the update option that best suits your needs.

### EXERCISE Z2: Sending Facility Repatriates

#### Original Sending Facility Should Update Record by Changing Current Location to Their Facility Name

#### Learning Objectives:

By the end of this scenario participants will be able to:

- Successfully update record by changing current location to their facility name

#### Learning Methodology:

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

- Update record by changing current location to their facility name with scanner,

or

- Update record by changing current location to their facility name without scanner, or
- Update record by multi patient/resident update (Check-In)

**Receive/Check-In 7 patients/residents using this process**

**Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

**Instructor Tips:**

Pick the update option that best suits your needs.

**EXERCISE S1: View Patients/Residents by Sending Location**

Sending facility has sent evacuees to the receiving facility and would like to determine if the patients/residents have been checked in

**Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully search for patients/residents by originating location

**Learning Methodology:**

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

1. Click Locate Patient/Resident from the menu bar.
2. Enter at least **two** search criteria.
3. Click **Locate Patient/Resident**.

The screenshot shows a web form titled "Patient/Resident Search Criteria". It contains several input fields and buttons. The fields include: "Location Org. Type" (dropdown), "Location" (dropdown), "Intended Dest. Org. Type" (dropdown), "Intended Dest." (dropdown), "Evacuation Operation" (dropdown), "First Name" (text), "Last Name" (text), "Gender" (dropdown), and "Date of Birth" (Month, Day, Year dropdowns). There are checkboxes for "(Match if Contains)" next to the name fields. A "Note Contains" field is at the bottom left. Two buttons, "Clear Form" and "Locate Patient/Resident", are at the bottom right.

**Instructor Resources and Training Materials:**

**Instructor Tips:**

If a person has never been to a facility (originated from or intended to be received) a facility would NOT be able to search for patient/resident by name. However, as long as you have the wristband you can update a patient/resident record in tracking system.

If a patient/resident arrives at a facility that was not their intended destination the only way to update their record is to scan, or manually enter, their wristband barcode

number in the update patient/resident option.

### **EXERCISE S2: Quick Search**

An individual with a wristband just arrived at the TMP location but was not destined for this location

#### **Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully use quick search to locate, update or view patient tracking history

#### **Learning Methodology:**

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

1. See **Quick Search** text box (located top right).
2. Type in search criteria, such as name, barcode, content from the notes section, etc.
3. Click **Quick Search**, if needed
4. Locate record and click the Barcode (Serial ID) link.
5. Verify: **Patient/Resident is found. You can update the information.**
6. View, Add, or change the necessary information.
7. Click Update Patient/Resident.

**If a person has never been to your facility, then you will NOT be able to search for them.**

#### **Instructor Resources and Training Materials:**

See PDF file: eFINDS\_QuickReferenceCard

#### **Trainer Tips:**

The Quick Search feature is located on the Register, Update, Locate/R, Dashboard, Manage Barcodes and the Admin. pages.

### **Exercise S3: Locate Patient**

Sending facility wants to locate all male patient/residents that were evacuated during this operation

#### **Learning Objectives:**

By the end of this scenario participants will be able to:

- Successfully search for patients/residents by originating location

#### **Learning Methodology:**

Through experiential learning the trainer will guide participants through an exercise

by instructing them to:

1. Click **Locate Patient/Resident** from the menu bar.
2. Enter at least two search criteria.
3. Click **Locate Patient/Resident**.

Patient/Resident Search Criteria	
Location Org. Type	Select One
Intended Dest. Org. Type	Select One
Evacuation Operation	Select One
First Name	<input type="text"/>
Last Name	<input type="text"/>
Gender	Select One
Note Contains	<input type="text"/>
Location	Select One
Intended Dest.	Select One
(Match if Contains)	<input type="checkbox"/>
(Match if Contains)	<input type="checkbox"/>
Date of Birth	[Month] [Day] [Year]
	<input type="button" value="Clear Form"/> <input type="button" value="Locate Patient/Resident"/>

If a person has never been to your facility, you will NOT be able to search for them.

### Trainer Tips:

Inform participants that the feature selected to update patient/resident location is determined by facility

### Instructor Resources and Training Materials:

See PDF file: eFINDS\_QuickReferenceCard

## Dashboard View Reports

### Scenario:

This scenario will demonstrate the features of Dashboard from another Operation  
(*revert to slide deck*)

### Learning Objectives:

By the end of this scenario participants will:

- Increase their understanding of the Dashboard and future functionality to generate reports that are valuable to the facility for tracking their evacuees
- Have an opportunity to suggest types of reports and information that would be useful to facilities in the Dashboard

### Training Methodology:

Didactic presentation with screen shots

### Instructor Resources and Training Materials:

eFINDS Quick Reference Card for Dashboard

Slides # 15 - 20

### Instructor Tips:

Currently, the Dashboard is designed to provide information for DOH management, LHD management, DOH regional offices and healthcare networks. Additional reports are being built that will be accessible to the facilities and useful during an event to track their evacuees. This scenario is simply to give trainees an awareness of Dashboard functionality, access rules and upcoming types of reports they will be able to access. Trainee feedback and suggestions for reports they anticipate needing will be very useful to gather during this scenario.

**EXERCISE A-5: HOUSEKEEPING**  
**Inactivate TMP & Training Operation**

**Learning Objectives:**

By the end of this scenario participants will be able to:

- Inactivate the Temporary Training Location
- Inactivate the Training Operations

**Learning Methodology:**

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

Training OPERATION

1. Click **Admin > Manage Operations.**
2. Locate/Select Operation.
3. Change Status to **Inactive.**
4. Click **Save** Operation.

TMP LOCATION

1. Click **Admin > Manage Locations.**
2. Locate/Select TMP Locations.
3. Change Status to **Inactive.**
4. Click **Save** Location.

**BREAK**

**Duration**  
**15 minutes**

# FACILITY TRAINERS SHOULD SKIP THIS MODULE 5 AND PROCEED TO FAQ SLIDES

<b>Module 5</b>	<b>Lesson Plan</b>
A Master Trainer should teach this module to facility trainers	
<b>Teach Back</b>	<b>Duration:</b> 180 minutes (Based on 20 participants)
<b>Goal of Module:</b> To allow participants the opportunity to practice teaching to ensure competency	
<b>Learning Objectives:</b>  By the end of Module 5 participants will be able to: <ul style="list-style-type: none"> <li>• Confidently teach a section of curriculum</li> </ul>	
<b>Training Methodology:</b> <ul style="list-style-type: none"> <li>▪ Teach Back Exercise <ul style="list-style-type: none"> <li>○ 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)</li> </ul> </li> <li>▪ 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</li> </ul>	
<b>Instructor Resources and Training Materials:</b> <ul style="list-style-type: none"> <li>• Refer to curriculum modules 1, 2, &amp; 4</li> <li>• Refer to curriculum module 3</li> <li>• Framework for Evaluation of Teach Back (Appendix H)</li> </ul>	
<b>Instructor Tips:</b> Learning is enhanced when participants have an opportunity to practice what they have learned	
<b>Module 6 Plan</b>	<b>Lesson</b>
<b>FAQs and eFINDS Resources</b>	<b>Duration:</b>
<b>Goal of Module:</b> To review FAQs and provide participants with eFINDS resources.	

**Learning Objectives:**

By the end of Module 5 participants will be able to:

- Understand eFINDS resources for technical and programmatic issues
- Increase awareness of frequently asked questions and answers

**Training Methodology:**

- Didactic

**Instructor Resources and Training Materials:**

- Slides 70 – 80(Master Trainer Slide Deck)
- Slides 62- 71 (Facility Trainer Slide Deck)

**Instructor Tips:**

# 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
  
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 patients/residents 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 patients/residents 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

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 patient/resident with or without scanner
- Register patient/resident one at a time or upload the eFINDS spreadsheet
- Update patient/resident one at a time or multiples
- Generate barcode PDF log or excel spreadsheet
- Register multiple patients/residents without having barcodes to scan

## 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 patient/resident with or without scanner
2. Register one at a time or upload the eFINDS spreadsheet
3. Update patient/resident with or without scanner
4. Update patient/resident one at a time or multiples

## Appendix E

### HCS (HPN) 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)

5. Check the box next to the person you want to add to the role\*
6. Click the **Add to Role** button.

\* If you are trying to assign a person with an existing HCS account user with another primary organization

5. Proceed to Option 3 or 4 "If the person does not appear in the list above..."
6. Enter **last name** in the text box
7. Click **Submit**
8. Search for HCS User with user ID by scrolling down through names
9. Select and Click the **Add to Role button**.

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

## Appendix F

### Facility eFINDS Planning Considerations Checklist:

The following checklist can be used to guide discussion and planning of an eFINDS process with Facility Leadership and subsequently organization discussion of the Facility's eFINDS process with trainees.

Ensure that you cover all relevant issues in your eFINDS implementation strategy:

1. Does the facility have persons identified who know the location of the eFINDS wristbands and scanners?
  - a. If the supplies are in a locked space does the appropriate person(s) have the key 24/7?
  - b. Are these supplies checked on a regular basis (i.e. quarterly, annually, etc.?) Are there staff available 24/7 to manage eFINDS functions?
  - c. Given your facility layout and number/location of stations at which you register your patients/residents, do you need additional scanners?
  - d. Do you have mobile devices that can be utilized as additional scanners?
2. Do you have cohorts of staff who are trained in the use of eFINDS and your facility's evacuation plan, including backup, to cover all your shifts?
  - a. Do you have evacuation coordinator(s) identified for all shifts who will oversee eFINDS implementation?
  - b. Have the evacuation coordinator(s) attended the appropriate training?
  - c. Does your facility have a staff member who has attended the 2015 eFINDS Train-the-Trainer?
3. Does trained eFINDS staff have NYSDOH Health Commerce System (HCS) accounts and have they been assigned to the appropriate eFINDS role in the Communications Directory?
  - a. Is 24/7 contact information (including after-hours contacts) for all of your eFINDS staffing cohort up to date on the HCS?
4. At what locations within the facility will you record the eFINDS data?
  - a. Will patients/residents report to a specific location to be barcoded?
  - b. Will staff go to each patient/resident's room?

- c. If you are a nursing home or adult care facility will you barcode residents during mealtime when residents are gathered in one location?
  - d. If a hospital will you assign specific barcodes to each Department to handle their patient registering and barcoding separately?
  - e. Will you record patient name and barcode assignment on the paper barcode log?
  - f. Do you need to scan the patient/resident's records at more than one checkpoint as they leave the facility to ensure that no one has wandered during the movement?
  - g. Have you printed a number of copies of the log to send to receiving facility with resident cohorts?
  - h. Have you defined processes for different types of evacuation scenarios, with/without power; emergency/planned evacuation; night/day; damage and blockage in the facility's physical space
  - i. Have you developed plans for exercising/drilling these processes with all relevant staff on all shifts?
5. Are you going to enter any key medical information into the notes fields in eFINDS?
6. Are you going to record your Medical Record # in eFINDS?
7. Are you going to scan your facility wristband into the notes field to capture your facility's barcode ID# in the eFINDS application?
8. Will you record the patient/residents barcode number on their personal and medical records that are sent with them to the receiving location? Will you write the barcode number on stickers and affix to personal belongings, Medical Equipment and go kits for your patients/residents?
9. Have you participated in any evacuation related planning efforts or exercises with your local health department and/or local office of emergency management?

# Appendix G

# Recommended eFINDS Functions Matrix

	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 areas	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
<b>Functions:</b>															
<i>Functions for registering patient/resident for evacuation at (from) the sending facility</i>															
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	
R 5(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 rooms	Many floors, and wings, large area	Small number of staff	Larger number of staff organized by different care service areas	Large percentage of low mobility patients/ residents	Power	No Power	Urgent Evacuation	Non-Urgent, planned evacuation				
<i>Functions for updating patient's/resident's current location at the receiving facility</i>															
U1. Updating Single Patient/Resident with Scanner by scanning barcode from barcoded bracelet or printed barcode log	X		X		X		X	X	X		X				
U2 Update Single Patient/Resident without Scanner	X		X	x	X	X	x		X		X				
U3 Update group of Patients/Residents		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
<b>1. Followed curriculum</b>	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.
<b>2. Topic Knowledge</b>	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.
<b>3. Audience Adaptation</b>	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.

**SIMPLICITY**

**CLARITY**

**BREVITY**

Skill level Performance Criteria	Emerging	Developing	Advanced
<b>4. Language Use (Verbal Effectiveness)</b>	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.
<b>5. Delivery (Nonverbal Effectiveness)</b>	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.	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.	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.

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**SIMPLICITY**

**CLARITY**

**BREVITY**

***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):**

**SIMPLICITY**

**CLARITY**

**BREVITY**

***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**