

**Notes:**

All of the visual elements of your application—buttons, text, graphics, and even pages and backgrounds—are objects. Each object has a set of properties that define its appearance and behavior.

Author level for editing; Reader level for testing. Press F3 to toggle levels.

# Guidelines for Subject-Matter-Experts

## *Overview*

PerforMax<sup>3</sup> lessons are 100% customizable! Using the PerforMax<sup>3</sup> Lesson Modification form, you will be able to modify and update content, graphics and media as needed.

All existing PerforMax<sup>3</sup> lessons have industry standard content. Generally, 85-95% of the content, graphics and other media will be readily applicable to your facility. To best serve your organization, you may wish to change, add or delete information to make the training site-specific.

Before the customization and editing process begins it is necessary to know what site-specific information should be included in each lesson. For example, there is probably specific information and policy on the use of restraint for your organization. As a subject matter expert, you will want to gather that information in preparation of integrating it into the PerforMax<sup>3</sup> lesson on Restraint.

There may also be organization specific training material that could be useful in the customization process. For example, you may have a PowerPoint presentation on a key topic. Elements of that presentation can be captured and integrated into the computer-based program.

### Your Role as a Subject Matter Expert (SME)

- Review training content in the assigned lessons.
- Create any new/replacement text for the lesson.
- Identify and collect appropriate graphics to be used.
- Identify and collect specific reference materials.
- Ensure focus on the essential learning objectives.
- Minimize the extent and number of changes.
- Complete the Lesson Modification Form.

## Notes

Use content that is appropriate for the entire organization.

Only add content that supports key learning objectives.

Be very specific with edits; write your changes down verbatim.

Make sure changes contain or refer to appropriate organization policies, procedures and practices.

Provide adequate time for thorough and thoughtful review.

Adults learn best when the following elements are included in the learning:

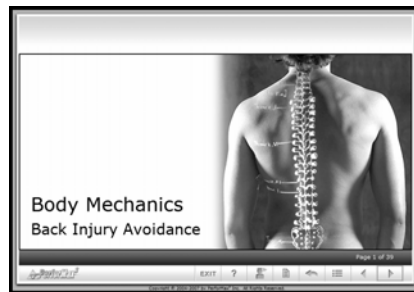
- Engage learners
- Address thinking, feeling and acting
- Use realistic examples
- Vary learning methods
- Use multisensory learning objects.

## Best Practices

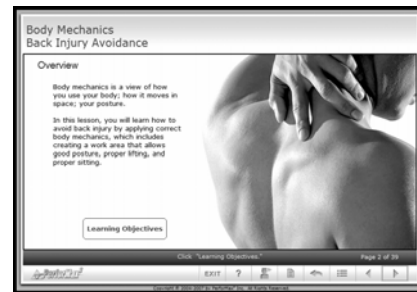
### Reviewing Content

Go through the entire lesson, as it is, to get a feel for the instructional flow and the learning objectives covered. Your goal is to provide appropriate content that is effective for learning to take place.

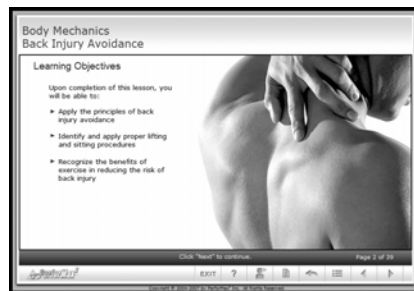
The first screen after the title page contains an overview of the training covered in the lesson. Once you've reviewed this page, select the button "Learning Objectives" to navigate to the learning objectives for the lesson.



Title Page



Overview Page with Button to Learning Objectives



Learning Objectives

You should review the learning objectives and ensure that they are aligned with the most important elements of the content. You'll want to make sure that the content covered in the lesson addresses the stated learning objectives.

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Next, review the lesson screen by screen, accessing all information such as responses to questions (correct and incorrect), and links to “hidden” information through graphics and buttons. Pay particular attention to the critical aspects of your lesson. These aspects may include:

- Accuracy of Information
- Aesthetics
- Completeness
- Effectiveness
- Efficiency
- Instructional validity
- Navigation and appropriate feedback
- User-friendliness

You, as an expert, may troubleshoot differently than a novice would. After only a bit of fact-finding, experts tend to draw tentative conclusions looking only at the “big picture.” Novices, on the other hand, go down a list of possibilities, trying each in sequence to see whether it could be a problem.

We recommend that you ask a novice to also review the lesson under your supervision, taking care to make notes on the following:

- Is it easy for the user to operate the software?
- Do learners stay attentive?
- Do learners pass skill quizzes? Should you add more practice?
- How quickly do learners finish?
- Do learners possess desired knowledge after completing training?
- What are the learners’ attitudes?
- Other comments?

Finally, analyze the assessment questions to ensure that learners are being tested on key lesson points, and that the assessment validates the Learning Objectives.

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## Common Changes

The following are examples of the most commonly requested changes. Remember that you are modifying your lesson to meet the broad-based needs your hospital or organizational system. If you change these items, ensure that they are accurate for the entire organization. If facility specific information is required, your development team can work with individual facilities to customize the content to include site-specific information.

- Name of Facility
- Contact Person and Phone Extension
- Job Titles
- Area Names, Room or Office Designations
- Office Hours of Operation
- Emergency Procedures
- Departmental/Organizational References



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## Step-by-Step Instructions

### Documenting Changes

Our streamlined, paperless lesson modification process provides an approved documentation trail and comprehensive change management in an easy-to-use format. Simply access the Excel (version 2003) spreadsheet (see example below) to indicate the changes, additions or deletions you would like to see, and email it to PerforMax<sup>3</sup> for execution. You will receive a revised copy of your training lesson shortly thereafter.

**Making Global Changes:** As you move page by page through each lesson, you may wish to add/change the same information, such as the name of your facility, in every instance. You do not need to mark these changes for each and every page; simply insert this intention in the “Global Changes” field of the PerforMax<sup>3</sup> Lesson Modification form. For example:

- Replace “the hospital” with “UHC 358”, or
- Add “Standard Facility Policy” to every page.

	A	B	C	D	E	F	G
1	Pg ID	Pg	SME Comments	PMax Comments	Int./Date	QC	
2							
	Global Changes		Replace "the hospital" with "UHC 358" Add "Standard Facility Policy" to every page				
3							
4							
	temp001	1	Delete this page.				
5							
6							
	temp002	2	Change "Policy 8.15" to "per Patient Care Guidelines"				
7							
8							
	temp003	3	Add "Complete Form NP6054 and forward it to UHC Pharmacy" after "note changes in the patient's chart".				
9							
10							
	temp004	4	Text ok, but add graphic (attached) nursechart.jpg next to text.				
11							

Make Global Changes

Make Changes to Individual Pages

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**Making Individual Changes:** Enter changes *exactly as you would like them to appear in the lesson*. Insert your changes into the field for the intended page, indicating the placement for the change. For example:

- Change “Policy 8.15” to “per Patient Care Guidelines.”
- Add “Complete Form NP6045 and forward it to UHC Pharmacy.” after “note changes in the patient’s chart.”
- Add graphic nursechart.jpg next to text.

**Deleting Pages:** You may identify pages to delete by writing “Delete Page” in the comments field for the intended page.

**Adding Pages or Topics:** You may want to insert pages with content that is important to the organization. Enter the new information at the end of the Lesson Modification form by inserting text into the next available blank line, as shown in the example below.

Type all text and page layout instructions into the SME Comments cell for the page. The typing area will lengthen to fit what you type. To add line breaks and spacing, use ALT Enter.

Be sure to indicate the desired placement of the page per the existing page layout. For example:

Pg ID	Pg	SME Comments	PMax Comments	Int./Date
		<p>Insert new page between current pages 6 and 7.</p> <p>Title: Environment of Care - Employee Safety/Hazard Recognition</p> <p>Subtitle: Common causes of slips, trips and falls</p> <p>A fall can occur when your balance is thrown so far off center that you lose your footing. Seemingly innocent office conditions (like a small coffee spill in the hall or a frayed edge of carpet) can cause a serious fall. Any serious loss of footing usually leaves you nowhere to go but down.</p> <p>(Reveal 3 Topics)</p> <p>Slips Slips happen where there is too little friction or traction between your shoe and the walking surface.</p> <p>Trips Trips happen when your foot strikes or hits an object, causing you to loose your balance.</p> <p>Falls Most falls happen on the same level resulting from slips and trips. Falls also happen from heights such as ladders or stairs.</p>		

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Instead of entering an entire page, you can cut and paste formatted text from Toolbook Assistant, Word, Powerpoint and Excel using the Copy or Cut and Paste commands.

You may also attach an existing Word or PowerPoint file electronically. Simply indicate the page placement and the attached file as follows:

“Insert page 3 of attached Fire\_Safety.ppt file between pages 6 and 7”

		Insert page 3 of attached Fire_Safety.ppt file between pages 6 and 7		

When adding new information, consider the needs of the learner and keep the number of words on a page to no more than 60-70. You may need to add several new pages if the information is quite detailed or long. If you wish to insert new graphics, you'll need to identify and provide the graphic in an acceptable format (jpeg, gif, ppt, etc.)

Add as many pages as needed. Enter the information for each page in a separate line at the bottom of the form.

For more examples of the Lesson Modification Form see Appendix A.

## Notes

Adults learn best when the following elements are included in the learning:

- Engage learners
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**Indicating New or Changed Interactive Functions:** Use the Lesson Modification form to request changes to the way a page or automatic link works. Instead of presenting information in paragraph form, you may request a button that, when pressed, animates the text or adds information to keep the learner's attention. Or, you may wish to reformat a paragraph of text into a question and answer page to stimulate the learner's interests.

The screenshot shows a software interface for 'Environment of Care Emergency Management'. The main heading is 'Emergency Management Basics'. Below it, a question asks 'What characterizes an emergency?'. The answer provided is 'A workplace emergency is an unforeseen situation that suddenly or significantly:'. Three bullet points, each preceded by a question mark icon, list characteristics: 'Disrupts the environment of care', 'Disrupts care and treatment', and 'Increases demands for services'. To the right of the text is a photograph of emergency responders in full gear attending to a patient on a stretcher. At the bottom of the interface, there is a navigation bar with an 'EXIT' button, a help icon, and other navigation symbols. A footer at the very bottom reads 'Copyright © 2004-2007 by Performax Inc. All Rights Reserved.'

**Modifying Existing Graphics:** Indicate on the Lesson Modification form which graphics to delete and which *electronic files* then to include. Please limit your graphics to JPEG or GIF files.

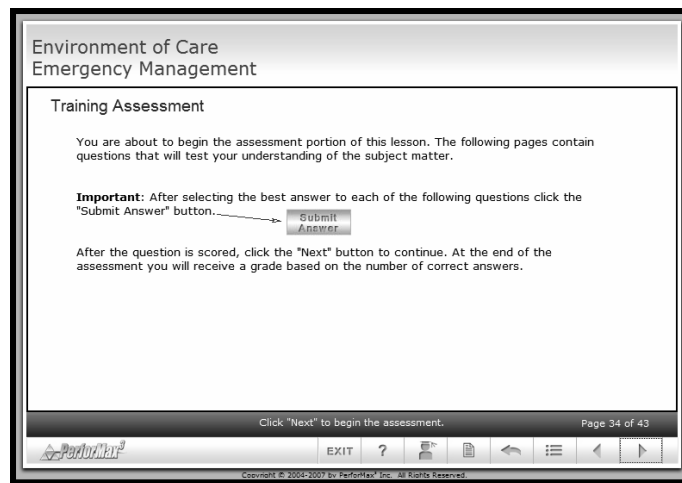
**Replacing Video:** We have included video that is instructional. Video clips are generally no more than 15 to 30 seconds in length. Your facility may choose not to use media, because of band-width limitations within your computer system. After reviewing the screen and associated video clip, you will need to be creative in suggesting how the video learning object is replaced with an alternative learning object. A text-based case study may be an appropriate replacement for a video.

## Notes

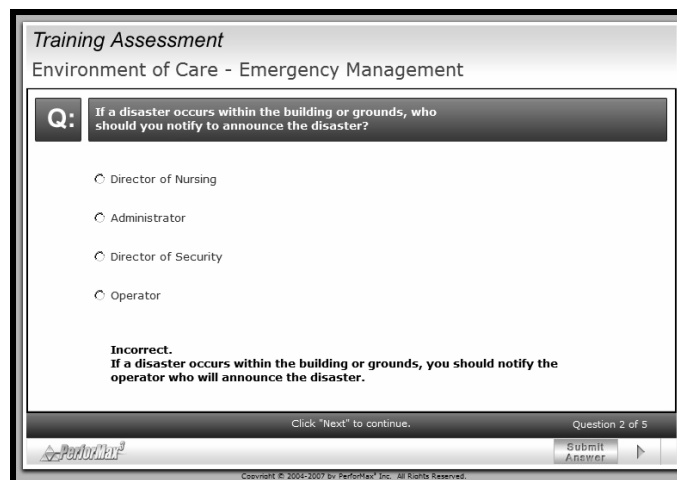
The training assessment is one of the most complicated parts of the PerforMax<sup>3</sup> template. It is critical that you use the processes and conventions outlined in the "Customizing the PerforMax<sup>3</sup> Assessment" section of this document.

**Updating Test Questions:** At the end of each PerforMax3 lesson is a training assessment containing 5 to 10 Multiple Choice and True/False questions. The Lesson Modification Form offers individual boxes for each question.

Questions should be composed to assess basic competency and the key learning objectives reinforced in the lesson. You may choose to keep questions, modify them, or delete and replace them.



Our assessment questions provide instructional feedback to the learner once a student submits an answer. You'll want to use this methodology for questions and responses you change or add. See example below:



## *Final Tips*

Remember that you are editing your lesson for the entire organization. You'll want to be very systematic and organized as you document your recommended changes. Use the following tips to help create an instructionally sound on-line lesson:

- Use content that is appropriate for the entire organization.
- Do not add content that does not support key learning objectives.
- Be very specific with your edits. Don't leave the developer guessing as to what you want changed. Write out the exact wording you would like to see in the lesson.
- Make sure your changes contain or refer to appropriate organization policies, procedures and practices.
- If you add pages, be sure to specify the order they are to appear and the location of any electronic files that can be used to minimize rework.
- If you identify a graphic change (for example, a special form, a photo of certain equipment, a picture of a key individual, facility, etc.), you'll need to supply the graphic in high resolution, digital format.
- Think "outside the box" for creative ways to engage the learner. Remember, with on-line learning, the instructor is the computer, not a live human being.