Sample Training-Related Roles and Responsibilities

Review training responsibilities across roles before and after go-live

A clear division of roles and responsibilities is needed to ensure smooth and effective system training. The following table lists sample training responsibilities across IIS roles, both before and after system go-live.

Instructions

Refer to the following sample training roles and responsibilities, and consider how these can be used as a starting point to further define training expectations as they relate to a large-scale project such as an IIS platform migration or smaller-scale system changes.

MIGRATION TOOLKIT
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Role	Responsibilities before go-live	Responsibilities during and after go-live
Vendor	● Train the immunization program on the functionality of the IIS (train the trainer). ● Provide an IIS training environment for end-user training (separate from user acceptance testing environment).	● Provide release notes on enhanced functionality, patches and major/minor releases. ● Respond in a timely manner to questions related to training of new functionality.
Immunization program manager	● Approve training plan. ● Communicate plan to senior management. ● Approve training materials.	● Be apprised of any critical/major issues identified during the first two weeks of go-live. ● Attend brief (e.g., 30-minute) meetings with trainers, help desk, IT, vendor and the IIS manager.
IIS manager	● Review all training materials. ● Identify training website for posting all material. ● Monitor all training activities.	● Ensure staff have resources needed for training. ● Assist with training of staff and/or end-users.
IIS lead trainer	● Develop training plan. ● Develop a training curriculum. ● Develop video shorts. ● Develop quick reference guides. ● Develop live training curriculum. ● Oversee completion of manuals. ● Train the trainers. ● Assign webinar training teams – one presenter, one coordinator. ● Identify key IT resource available for troubleshooting during webinars. ● Identify one strategic location to conduct webinars (quiet conference room). ● Develop webinar schedule. ● Serve as primary point of contact for training issues and liaison between trainers and management. ● Select an application that can be used for registering participants for trainings. ● Coordinate provider registration for webinars. ● Create a schedule that includes training dates, trainers, location, attendees, training methods and training materials. ● Determine locations for onsite trainings.	● Monitor ongoing training activities. ● Update quick reference guides and other materials as needed. ● Collect, synthesize and summarize feedback from training site users. ● Recommend topics for updating help desk scripts. ● Conduct in-person trainings in provider offices as requested or needed. ● Conduct regional trainings if needed. ● Ensure schools and childcare facilities are trained. ● Update FAQ document. ● Summarize training attendance data. ● Update training curriculum as needed. ● Compile training evaluation results to share with leadership.

Role	Responsibilities before go-live	Responsibilities during and after go-live
	• Develop FAQ document. • Develop scripts for help desk staff. • Identify process to document attendance data. • Develop sign-in sheet for group trainings. • Coordinate with communications for webinar recording and posting. • Coordinate posting of video shorts. • Prioritize training schedules. • Coordinate posting of quick reference guides. • Coordinate posting of user manual. • Develop training evaluation form.	
Communications lead	• Manage webinar recording and posting. • Establish IIS email link for use on the IIS site and marketing material. • Manage posting of video shorts. • Manage posting of quick reference guides. • Manage posting of user manual. • Draft training letter template. • Send IIS training letter to providers. • Send IIS training letter to schools/childcare facilities.	• Monitor video shorts activity. • Post updated training material in a timely fashion.
HL7 business analysts	• Define the HL7 onboarding process flow. • Develop standard operating procedures for onboarding. • Onboard existing provider HL7 interfaces. • Onboard new provider HL7 interfaces. • Train providers on new HL7 data quality resources.	• Onboard new provider HL7 interfaces. • Train providers on new HL7 data quality resources.
Trainers	• Attend train-the-trainer session. • Conduct testing of system. • Conduct assessment of clinics requesting onsite training. • Conduct trainings. • Provide list of providers needing onsite training.	• Conduct onsite trainings to providers. • Update FAQ document. • Host live trainings in regions for in-program credits.
IIS help desk	• Attend training. • Review video shorts and quick reference guides. • Review website information and links. • Prepare call log document.	• Maintain call log. • Utilize help desk scripts. • Respond to help desk emails.