

Appendix E

Directions for completing excel workbook

Yearly Cumulative Training Record

Instructions for completing the Yearly Cumulative Training Records

Overview:

The **Yearly Cumulative Training Records** are a part of an **Excel Workbook**. It contains the following Worksheets (tabs at the bottom of the screen): A **“Master”** sheet (*The Red Tab*), 3 **“Transfer Staff”** sheets and 30 **“Staff”** sheets.

The **“Master”** sheet is where you will input all of your training for the year.

The **“Transfer staff”** sheets are blank worksheets, and the **“Staff”** sheets are for each of the staff at your home(s).

Each “Training Record” has columns for the date of the training. There is also a column to record the type of training that the staff received.

- “Fixed” trainings are the “mandatory” trainings,
- Bi-annual trainings, and
- Annual training

The dates staff receive training for the above trainings, are not linked to one another and will need to be **entered for each staff, manually**.

Finally, there are columns in which to enter the trainer’s name (or initials) and the length of the training. (See *image at right*)

DATE	TRAINING	TRAINER	HOURS
	CPR-First Aid(every 2 years)		
	Glucose meter(every 2 years)		
	Epipen (every 2 years)		
	OIS 2-yr certification (every 2 years)		
	Medication & Documentation (2 yrs)		
	Safe driver and lifting (2 yrs)		
	Fire Extinguisher (annually)		
	Earthquake Drill (annually)		
	Transfer Competencies (if applicable)		
	Autism (1 time mandatory)		
	Borderline Personality Disorder (1X mandatory)		
	Antisocial Personality Disorder (1X mandatory)		
	Obsessive Compulsive Disorder (1 X)		
	Verbal De-escalation (1 time mandatory)		
	Conflict Resolution (1 time mandatory)		

Step 1: Worksheet Set-Up

1. An Excel **Workbook** is like a client’s Program Book. When you open up the Program book, there are several tabs to organize information (e.g. ISP, Blended Plan, PVO’s, etc). Each Worksheet in an Excel **Workbook** is like a tab in a client’s Program Book.
2. To organize your Excel Workbook, you will need to **re-name** each of the Worksheet tabs on the bottom of the workbook.
3. **NOTE:** *You will only rename the tabs titled “Staff 1, Staff 2, etc...”* You **WILL NOT** RE-NAME THE RED TAB **“MASTER.”**
4. To complete this, **Right click** the worksheet named “Staff 1.” A box will appear with several options. Highlight “Rename.” Then, type the name of the staff and hit “Enter.” Repeat this process for all of the staff at your home. (See *image at right*)

DATE	TRAINING	TRAINER	HOURS
	CPR-First Aid(every 2 years)		
	Glucose meter(every 2 years)		
	Epipen (every 2 years)		
	OIS 2-yr certification (every 2 years)		
	Medication & Documentation (2 yrs)		
	Safe driver and lifting (2 yrs)		
	Fire Extinguisher (annually)		
	Earthquake Drill (annually)		
	Transfer Competencies (if applicable)		
	Autism (1 time mandatory)		
	Borderline Personality Disorder (1X mandatory)		
	Antisocial Personality Disorder (1X mandatory)		
	Obsessive Compulsive Disorder (1 X)		
	Verbal De-escalation (1 time mandatory)		
	Conflict Resolution (1 time mandatory)		

Step 2: Inputting Training Information

All training information (with some exceptions) will need to be inputted into the “Master” Worksheet. This sheet is “linked” to the 30 “Staff” worksheets. As such, any information recorded on the Master sheet will automatically appear on the remaining staff sheets. In addition, the worksheets automatically add up the training hours. The Yearly Cumulative Training records have been designed in this way to reduce the amount of data entry required to complete these in a timely manner.

In the Master Worksheet you will input the following:

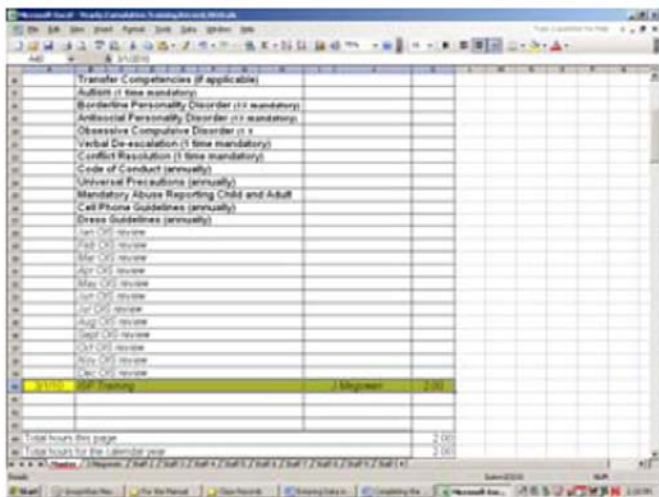
Year: This is a cell linked to all of the Staff worksheets. Input the current year (this has already been completed for 2010).

Date: This is the date that the training started. For example, if you were training a new Blended Plan and you began training staff on 2/1/10, you would input 2/1/10. In many cases, this **will not be** the date that the particular staff actually received the training.

For example, you may have started the training on 2/1/10, however only 1 staff actually received the training on that date. Other staff may have received the training on 2/5/10, 2/15/10, and 2/22/10 respectively. The Yearly Cumulative Training Record will no longer reflect this. That is what the “**DHS 4562 Employee Instruction Record,**” **DHS 4609 Instruction Record/Manual Restraints**” and “**DHS 4610 Employee Record/Evasions & Releases**” are for. As such, **do not lose your Instruction Records.**

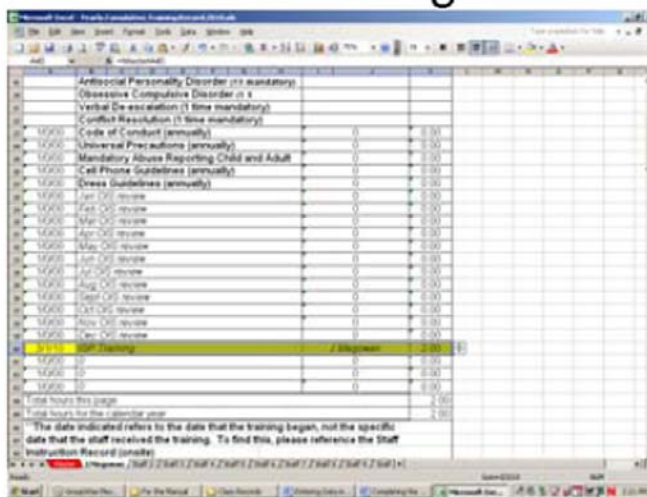
***In the Example below, you will see that the information entered on the Master Sheet automatically appears on the staff sheet labeled “J.Megowan.” Master Sheet / Staff Sheet “J.Megowan.”*

Master Sheet



The screenshot shows an Excel spreadsheet with a list of training topics in the left column. The topics include: Transfer Completion (if applicable), Audition (if time mandatory), Borderline Personality Disorder (if mandatory), Antisocial Personality Disorder (if mandatory), Obsessive Compulsive Disorder (if mandatory), Verbal De-escalation (if time mandatory), Conflict Resolution (if time mandatory), Code of Conduct (annually), Universal Precautions (annually), Mandatory Abuse Reporting Child and Adult, Cell Phone Guidelines (annually), Dress Guidelines (annually), Jan - Dec review, Feb - Oct review, Mar - Nov review, Apr - Sep review, May - Aug review, Jun - Jul review, Jul - Jun review, Aug - May review, Sep - Apr review, Oct - Nov review, Nov - Dec review, Dec - Jan review, and Jan - Dec review. The right columns contain dates and numerical values representing hours.

Staff Sheet “J.Megowan”



The screenshot shows an Excel spreadsheet for staff member J.Megowan. It contains the same list of training topics as the Master Sheet. The dates and hours are populated for each topic, showing the specific training dates for this staff member. A note at the bottom of the spreadsheet states: "The date indicated refers to the date that the training began, not the specific date that the staff received the training. To find this, please reference the Staff Instruction Record (annually)".

Mandatory Trainings: There are several Mandatory trainings that appear on each Training Record. When inputting dates for these trainings you will need to input the specific date that each staff received this training. The dates are not the same for all staff. As such, you will need to manually input these for each staff. Exceptions to this include the following trainings:

- a. Code of Conduct (annually)
- b. Cell Phone Guidelines (annually)
- c. Universal Precautions (annually)
- d. Dress Guidelines (annually)
- e. Mandatory Abuse Reporting Child & Adult
- f. Jan – Dec. OIS reviews

These dates will be the same date for every staff.

Step 2a: Inputting Information into the “Staff” Worksheets

The only information that you will need to input into the Staff Worksheets is the name of the particular staff. Go to the “Name” box and type in the staff’s name. There are 4 pages to each Yearly Training Record. **Type the Staff’s name on Page 1.** (Their name will automatically appear on the remaining three pages.) See image below.

Page 1 of Training Record

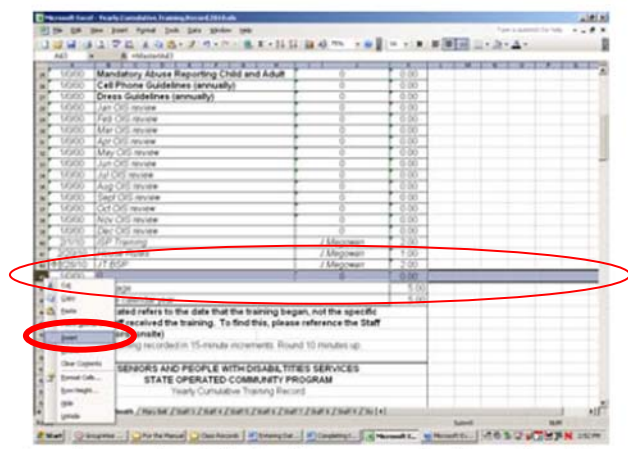
Page 2 of Training Record

Step 3: Trouble Shooting

Q: What if I complete an individual training for a staff, however no one else received that training. For example, if I complete an individual re-training on a client’s Blend Plan? Where do I enter the data?

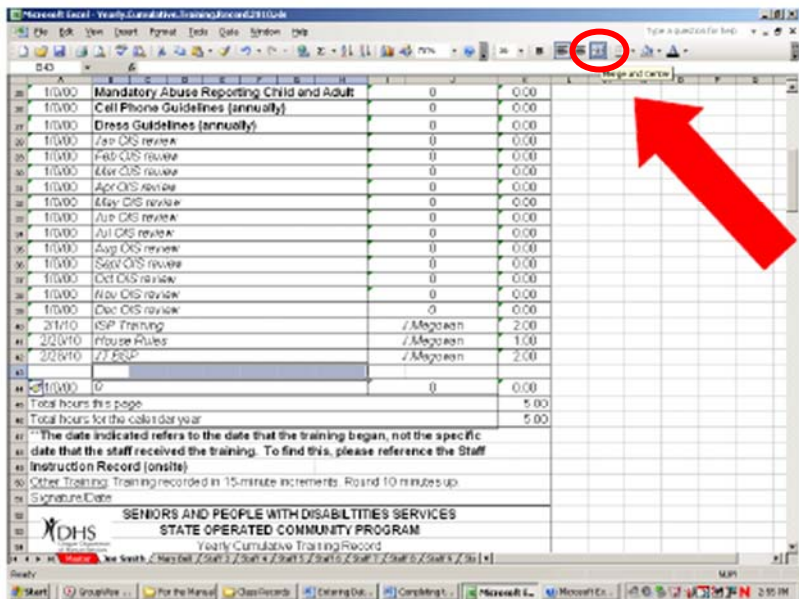
A: At times, this will happen. In the example below, Joe Smith received an individual re-training on 3/1/10 for AB’s Blended Plan. However, Mary Bell did not need this re-training. To document this training, proceed with the following:

1. Open Joe’s training record (click on the tab with his name).
2. In Excel all rows and columns are numbered. For row numbers, look to the far left hand of your screen. Column numbers are designated by letters at the top of the worksheet.
3. Drag your mouse over the row numbers. Highlight the row after the most recent training (i.e. the next corresponding blank row) by *right clicking* on the mouse.
4. A box will appear with several options. Click on “Insert.” **See image to the left.**

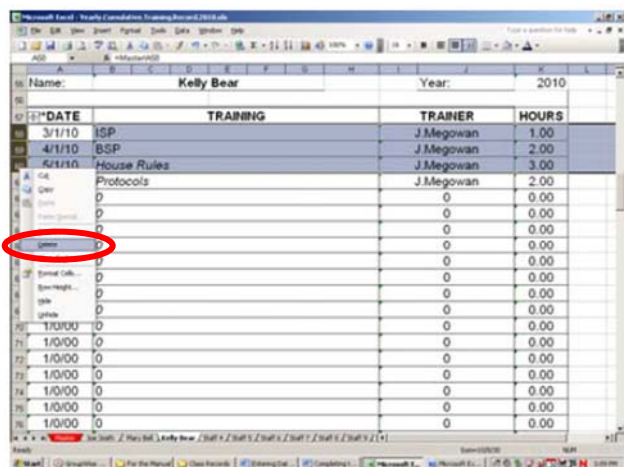


5. A row will automatically be inserted into the worksheet. However, the row will need to be formatted—more specifically; the cells will need to be “merged.” To complete this:

- a. Highlight the cell (not the entire row).
- b. Click on the “Merge and Center” Button in your toolbar. This is a little blue box with a lowercase “a.”
- c. This will automatically format the row for typing. You will need to format the cell for “Training” and Trainer every time that you insert a row. See image below.



5. Once the cells are merged, you will be able to type in the training that Joe received for AB's Blended Plan. This training will not appear on any of the other staff's records.

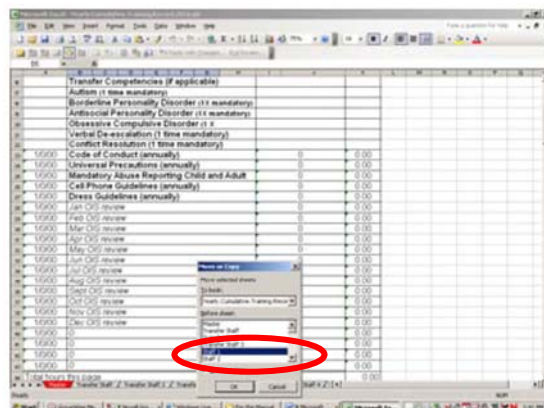
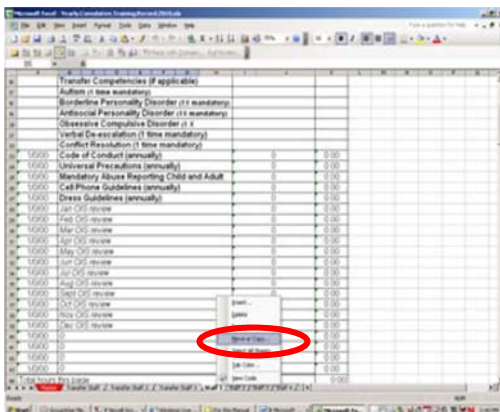


Q: What if a new staff comes to my house? For example, say it is June when the new staff comes. How do I remove training from January-June that they did not receive?

A: This will be similar the example above. For the example, say that the new staff/transfer staff, Kelly Bear is the new staff that arrives on 6/1/10. Re-name one of the tabs with her name. Then open her worksheet. Highlight the rows containing training for 3/1-5/1 (as in the example above). *Right click* on your mouse and when the box appears, highlight **"Delete."**

Q: What if I run out of worksheets and a new staff arrives?

A: Open one of the "staff" tabs. Right click on the tab and highlight **"Move or Copy."**



A box will appear asking where you want to "move" the new tab. Scroll down on where you want the new staff's tab to be located. Remember to check the box at the bottom **"Create a Copy."** Click "okay."

Finally, **rename** the new worksheet.

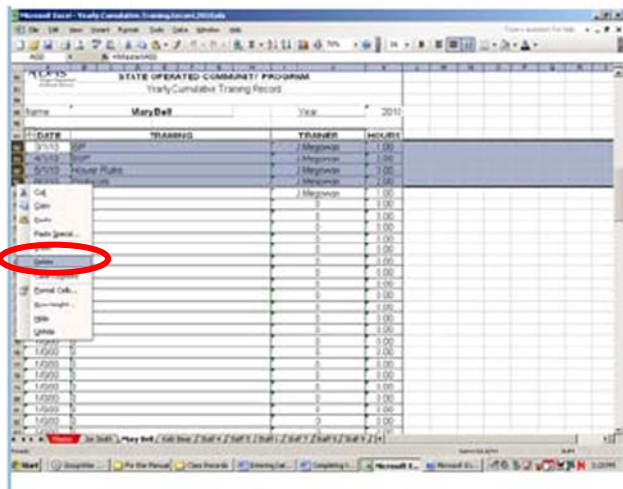
Step 4: Important things to Remember!!

1. **Green Arrows:** The **green arrows** that you see in the upper left hand corners of each cell indicates that the **cell is linked** to either the Master document or another cell in the worksheet. When you see the arrows it is a reminder **NOT TO delete or enter any information in these cells.** If you do, you will break the link to the Master document. The Master document does not contain too many green arrows. This is where you should enter or delete any information.

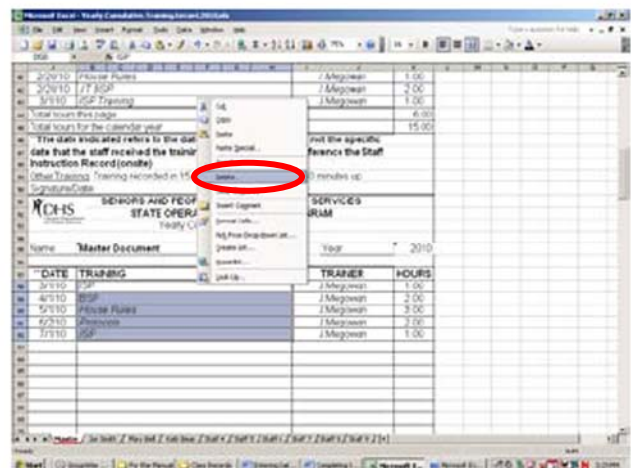
58	1/0/00	0	0	0.00
59	1/0/00	0	0	0.00
60	1/0/00	0	0	0.00
61	1/0/00	0	0	0.00
62	1/0/00	0	0	0.00
63	1/0/00	0	0	0.00

2. **Never Delete/Enter any information in the cells of the staff's worksheets:** If you need to add/delete any specific information for a particular staff, only **insert or delete entire Rows** *(See step #3). This way no links are broken. You can only delete the contents of a cell (e.g. Training, dates, number of hours) from the Master Sheet.

Deleting Entire Rows from Staff Worksheet



Deleting specific contents in a cell from the Master Worksheet



3. The cells within the Excel document are "merged." As such, you will not be able to "sort" the trainings. For example, if you had inputted all of your training for January-March, then found in June that you forgot to input training in January. You want to enter the training, and then have it sorted into chronological order. This is your option:
 - a. Highlight all of the cells that you want to sort into chronological order.
 - b. Hit the un-merge button.
 - c. Sort the data
 - d. Re-merge each cell individually.

