

Lesson Format

Independent Learning Guide (ILG)

- ☐ Short lessons (30 minutes or less).
- ☐ Lessons used by participants for self-directed learning.
- ☐ Lesson involving system or application demonstration.
- ☐ Lesson will be published to LMS
- ☐ Lesson will include an assessment

Lesson Component Time Breakdown

Component		Estimated Time
Introduction		1 Minute
Key Learning Points (KLPs)	#1 Accessing <Sample>	2 Minute
	#2 Submitted <Learning>	6 Minutes
	#3 Assigning <Learning>	6 Minutes
	#4 Working in <Learning> Tabs	5 Minutes
	#5 Creating and Assigning <Learning>s	3 Minutes
	#6 Closing an <Learning>	3 Minutes
	#7 Reassigning Misrouted <Learning>	3 Minutes
	Assessment	15 Minutes
Lesson Conclusion		1 Minute
Total Lesson Time		45 Minutes

Lesson Summary

This lesson will demonstrate the process for <Learning> in <Sample>.

Learning Overview

Key Learning Point (KLP)/Essential Topics List

Key Learning Point		Essential Topics and Messages
#1	Accessing <Sample>	<input type="checkbox"/> Provide Link to <Sample> <input type="checkbox"/> Open in Edge/ Set Edge to default <input type="checkbox"/> Save to favorites <input type="checkbox"/> Log in credentials
#2	Submitted <Learning>	<input type="checkbox"/> Navigating the <Learning> Management tabs in the left-hand menu/ Where to find work <input type="checkbox"/> Navigating the <Learning> List to see <Learning> that have been submitted <input type="checkbox"/> Search for <Learning> <input type="checkbox"/> Reviewing information entered by <Learning> Submitters
#3	Assigning a <Learning> Owner	<input type="checkbox"/> How to assign an <Learning> <input type="checkbox"/> Working in "My <Learning> View: <input type="checkbox"/> Changing the <Learning> state
#4	Working in <Learning> Tabs	<input type="checkbox"/> Reviewing and working in the <Learning> Tab <input type="checkbox"/> Reviewing and working in the <Learning> Tab <input type="checkbox"/> Reviewing and working in the Work Notes and Action Notes Tabs <input type="checkbox"/> Overview of the Resolution Tab (revisit during Closing a <Learning>)
#5	Creating and Assigning a <Learning>	<input type="checkbox"/> Creating a <Learning> <input type="checkbox"/> Assigning a <Learning> (Refer to Job Aid) <input type="checkbox"/> Working in <Learning> Tabs as the <Learning> Owner <input type="checkbox"/> Monitoring and escalating <Learning>s that you have assigned
#6	Closing an <Learning>	<input type="checkbox"/> <Learning Action> <input type="checkbox"/> Learning Progress
#7	Reassigning Misrouted <Learning>	<input type="checkbox"/> Reassigning <Learning> <ul style="list-style-type: none"> ○ Reassign to call back ○ Misroute or Reroute of an <Learning> ○ Providing <Learning>

Introduction

This lesson will introduce XXXX's Enterprise <Learning> Management program (OEIM) and the <Sample> system as a replacement to the <Sample> system for resolving customer <Learning>. The deployment of the <Sample> tool will create standard processes to identify, record, and analyze <Learning> drivers and prioritize actionable opportunities to improve our services for our constituents. Resolving <Learning> within a <certain time period> is evidence that we value performance. Following through with our commitment to our constituents is a display of our compassion and will fortify our relationships. <Your Company Staff> will learn how to manage <Learning> for <Sample> that need to be reprocessed through the <Sample> system for resolution by assigning the <Learning>, assigning <Learning>s, updating the <Learning> note and status and closing the <Learning>.

Key Learning Point #1 Accessing <Sample>

Planned Activities/ Instructional Methodology/	<p>This entire demonstration will be based on the example in the <Learning> <Sample> Demo. This will be a continuation so that <Learning> owners can see the relation from what a <Learner> enters to the work they will manage. Recorded demonstration with narration of:</p> <ul style="list-style-type: none">• Accessing <Sample> in Edge• Setting Chrome as default browser• Saving <a href="https://<Sample>.XXXX.com">https://<Sample>.XXXX.com to favorites• <Login> credentials
Graphics/Visuals	<p>In addition to visual and audio recording, slides will include and buttons/resource links to:</p> <ul style="list-style-type: none">• <a href="https://<Sample>.XXXX.com">https://<Sample>.XXXX.com• Setting chrome as your default browser job aid <p>Recording will not be continuous. Participants will have to click next to proceed to next topic.</p>

Key Learning Point #2 Submitted <Learning>

Planned Activities/ Instructional Methodology/	<p>This part of the demonstration will provide steps to navigating the <Learning> Management tabs in the left-hand menu.</p> <ul style="list-style-type: none">• Describe the purpose of each queue. This is how <Learning> Owners access their work.<ul style="list-style-type: none">○ My <sample> <Learning>○ My sample> <Learning>○ Workplace• Describe the process of organizing views and reviewing the <Learning> to work more efficiently<ul style="list-style-type: none">○ Organizing sample> <Learning> (Job Aid)○ Search for <Learning>○ Reviewing information entered by <Learning>
Graphics/Visuals	<p>In addition to visual and audio recording, slides will include and buttons/resource links to:</p> <ul style="list-style-type: none">• List View Job Aid

	Recording will not be continuous. Participants will have to click next to proceed to next topic.
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Key Learning Point #3 Assigning an <Learning> Owner

Planned Activities/ Instructional Methodology/	<p>This part of the demonstration will provide the steps to assigning an <Learning></p> <ul style="list-style-type: none"> • Saving after assigning and changing State from “This” to “That” <p>Describe the process of working in “My <Learning> View:</p> <ul style="list-style-type: none"> • Moving <Learning> from the here to there into your work queue (My <Learning> View) • Changing the <Learning> state importance of moving from triage to resolve in progress and the impact to KPIs/KRIs
Graphics/Visuals	Visual and audio recording of assigning an <Learning>. Recording will not be continuous. Participants will have to click next to proceed to next topic.

Key Learning Point #4 Working in <Learning> Tabs

Planned Activities/ Instructional Methodology/	<p>Demonstrator will describe the purpose of the fields in each <Learning> tab and how to explain how to fill them out:</p> <ul style="list-style-type: none"> • <Learning> Tab • Work Notes versus Regular Notes • Overview of the <sample>Tab (revisit during Closing a <Learning>)
Graphics/Visuals	Visual and audio recording of assigning an <Learning>. Recording will not be continuous. Participants will have to click next to proceed to next topic.

Key Learning Point #5 Creating and Assigning an <Learning> <Learning>

Planned Activities/ Instructional Methodology/	<p>The recorded demonstration will display the next steps to create a <Learning> and the steps to assign a <Learning> (Refer to Job Aid).</p> <ul style="list-style-type: none"> • Describe the purpose of assigning <Learning>s. If <Learning> cannot be done by <Learning> owner. Example: Sending Provider Update • Explain <Learning> Groups • Working in <Learning> Tabs as the <Learning> Owner <p>Monitoring and escalating <Learning>s that you have assigned</p>
Graphics/Visuals	Visual and audio recording. Recording will not be continuous. Participants will have to click next to proceed to next topic.

Key Learning Point #6 Closing an <Learning>

Planned Activities/ Instructional Methodology/	<p>The steps to close a case will be demonstrated.</p> <ul style="list-style-type: none"> • Cause and Action • Close in Progress
Graphics/Visuals	Visual and audio recording. Recording will not be continuous. Participants

	will have to click next to proceed to next topic.
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Key Learning Point #7 Reassigning Misrouted <Learning>

Planned Activities/ Instructional Methodology/	<p>The steps to reassigning <Learning> will be demonstrated.</p> <ul style="list-style-type: none"> ○ Reassign to sample> <Learning> call back or customer requested call back ○ Route or Reroute of an <Learning> ○ Providing Learning Guidance
Graphics/Visuals	Visual and audio recording. Recording will not be continuous. Participants will have to click next to proceed to next topic.

Assessment

Planned Activities/ Instructional Methodology/	<p>Summarize skills that were demonstrated in this lesson. This performance-based assessment will give the participant an opportunity to practice what was learned with a scenario and assess their level of knowledge on key concepts.</p> <ul style="list-style-type: none"> • 80% passing score • Unlimited attempts • Feedback given per question
<p>Question 1: HOTSPOT</p> <p>Graphics/Visuals: Screenshot of a desktop with several internet browser options</p>	<p>On the screen, click the internet browser that provides optimal performance for <Sample></p> <ul style="list-style-type: none"> • Answer: Hot spot on Edge icon <p>Correct message: Correct! Edge is the recommended browser for <Sample>.</p> <p>Incorrect message: You did not select the correct answer. Remember, Edge is the recommended browser for <Sample></p>
<p>Scenario</p> <p>Graphics/Visuals: The next few questions will be based on this call scenario:</p>	<p>The remainder of the questions will be based on the following scenario. This will be displayed on each question slide.</p> <p><i>Our constituent, <learner> called to report that his sample> <Learning> was denied because the procedure was not necessary, even though, he obtained sample> <Learning> and the sample> <Learning>. An <Learning> Submitter entered the information in <Sample>. It's up to you, as the <Learning>, to manage this <Learning> through a resolution within a 48-hour turnaround time.</i></p>
<p>Question 2: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of the home screen and left-hand menu</p>	<p>Which application menu, in <i>Left-hand Menu</i>, should you click to see tab options for <Learning>, My <Learning>s and My Unassigned <Learning>? Click the appropriate area on the screen to answer.</p> <ul style="list-style-type: none"> • Answer: Hot spot on <Learning> Management in the Left Navigation Menu <p>Correct message: Correct! Clicking the <Learning> Management section of the left-hand menu expands to display tabs for managing <Learning>.</p> <p>Incorrect message: You did not select the correct answer. Remember, Clicking the <Learning> Management section of the left-hand menu</p>

	expands to display tabs for managing <Learning>.
<p>Question 3: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of the home screen and left-hand menu</p>	<p>Where in the <i>Left-hand Menu</i>, should you click to see the <Learning> that need to be assigned? Click the appropriate area on the screen to answer.</p> <ul style="list-style-type: none"> Answer: Hot spot on My Unassigned <Learning> in the Left Navigation Menu <p>Correct message: Correct! Selecting My Unassigned <Learning> will display a list of unassigned <Learning> need to be assigned to an <Learning> owner.</p> <p>Incorrect message: You did not select the correct answer. Remember, My Unassigned <Learning> will display a list of unassigned <Learning> need to be assigned to an <Learning> owner.</p>
<p>Question 4: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of the home screen and left-hand menu with <Learning> Management expanded</p>	<p>When you click <i>My Unassigned <Learning></i>, the Unassigned <Learning> List displays. Where should you click to open <Learning> number ## item should you choose to log <Learning>? Click the appropriate area on the screen to open the <Learning>.</p> <ul style="list-style-type: none"> Answer: Hot spot on #### <p>Correct message: Correct! The open an <Learning>, click the <Learning> number hyperlink.</p> <p>Incorrect message: You did not select the correct answer. The open an <Learning>, click the <Learning> number hyperlink.</p>
<p>Question 5: MULTIPLE CHOICE</p> <p>Graphics/Visuals: Screen shot of the <Learning> in open state</p>	<p>When you click on the <Learning> number hyperlink from the My Groups Unassigned <Learning> List, the <Learning> form will display. The <Learning> has been sitting in an open state since the <Learning> was submitted. What can you do to move the <Learning> along in the process?</p> <ul style="list-style-type: none"> A) Change to the State to "In Progress" Answer: B) Assign the <Learning> and then click save. C) Change increase the level D) Create an <Learning> <Learning> <p>Correct message: Correct! Assigning an <Learning> and clicking save will automatically change the <Learning> state from Open to "In Progress". Doing this as quickly as possible is important because the duration of time from open to triage is measured.</p> <p>Incorrect message: You did not select the correct answer. Assigning an <Learning> and clicking save will automatically change the <Learning> state from Open to "In Progress". Doing this as quickly as possible is important because the duration of time from open to triage is measured.</p>
<p>Question 6: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of the home screen and left-hand</p>	<p>Where in the <i>Left-hand Menu</i>, should you click to see all the <Learning> that are assigned to you? Click the appropriate area on the screen to answer.</p> <ul style="list-style-type: none"> Answer: Hot spot on My <Learning> <p>Correct message: Correct! My <Learning> will display a list of <Learning></p>

menu	<p>that are already assigned to you. Navigate to this list to manage your work.</p> <p>Incorrect message: You did not select the correct answer. My <Learning> will display a list of <Learning> that are already assigned to you. Navigate to this list to manage your work.</p>
<p>Question 7: MULTIPLE CHOICE</p> <p>Graphics/Visuals: Screen shot of the escalation dropdown</p>	<p>Imagine that the <Learning> in this scenario has been assigned to you. After reviewing the details of the <Learning>, what course of action should you take to work toward <Learning> resolution?</p> <ul style="list-style-type: none"> • Answer: A) Provide proof of <Sample Learning> • B) Create a <Learning> for a <Learning> owner to sample <Learning> • C) Create <Learning> for a <Learning> owner to attach sample <Learning> • D) Reprocess the sample <Learning> <p>Correct message: Correct!</p> <p>Incorrect message: You did not select the correct answer.</p>
<p>Question 8: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of Behavioral ORS to Claim <Learning> <Learning> type pop up</p>	<p>Imagine that the <Learning> in this scenario has been assigned to you and you want to create a <Learning> for a <Learning> owner to _____. Which <Learning> Type should you select?</p> <ul style="list-style-type: none"> • Answer: <p>Correct message: Correct!</p> <p>Incorrect message: You did not select the correct answer.</p>
<p>Question 9: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of <Learning> Tab</p>	<p>Let's say that the sample > <Learning> in this scenario has been reprocessed and it is time to close the <Learning> in <Sample>. Where would you click to begin the process of closing an <Learning>?</p> <ul style="list-style-type: none"> • Answer: Hot spot on Resolution Tab <p>Correct message: Correct! Prior to updating the <Learning> state to " In Progress", the <Learning> Owner must complete key fields on the Resolution tab.</p> <p>Incorrect message: You did not select the correct answer.</p>
<p>Question 10: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of the Correction Action pop up</p>	<p>On the tab, the sample > <Learning> action, Cause Detail are required fields before changing the <Learning> state to "In Progress". Which Action should you choose for this scenario?</p> <ul style="list-style-type: none"> • Answer: Hot spot on sample > <Learning> <p>Correct message: Correct!</p>

	Incorrect message: You did not select the correct answer.
<p>Question 11: HOTSPOT</p> <p>Graphics/Visuals: Screen shot of the <Learning> record</p>	<p>Your group's work queue just received a new <Learning>. Answer the following questions based on this scenario.</p> <p>How should you proceed with processing this <Learning>?</p> <ul style="list-style-type: none"> • A) Assign the <Learning> to myself and click save • Answer: B) Right Click on the Top Gray Bar, to see the Hidden Menu, then select <sample> • C) Change to the State to "In Progress" • D) None of the above

Lesson Conclusion

Topics	Conclude lesson by listing the skills gained from this demonstration, thanking participants for their time and pointing them to additional resources (links to job aids) that were introduced in this lesson.
Planned Activities/ Instructional Methodology/	<p>In this demonstration you have learned:</p> <ul style="list-style-type: none"> • How to access sample> <Learning> • How to view and organize submitted <Learning> • How to assign <Learning> • How to work in <Learning> tabs • How to create and assign <Learning>s • How to close an <Learning> • How to reassign <Learning> <p>Click the resources link in the top right corner of the player window for a complete list job aids and resources mentioned in this training.</p>

Supplementary Documents

Existing Supplementary Documents to Leverage		
Type	KLP #	Document Title/Hyperlink
Job Aid	#1 Accessing <Sample>	Setting Edge as your default browser job aid
Job Aid	#2 Submitted <Learning>	List View Job Aid
Job Aid	#5 Creating and Assigning <Learning>s	Creating <Learning> in <Sample>
Job Aid	#6 Closing an <Learning>	Putting an <Learning> in Close In Progress (i.e. <Learning> Correction Action and Root Cause)

		Closing an <Learning> with a Constituent
Job Aid	#7 Reassigning Route <Learning>	Route of a <Learning>

Revision History

Date	Version	Description

Approval

Date	Version	Approver	Comments