X Compliance Training Plan   
*Prepared by: Jill Davidian, Instructional Designer*  
2/19/18

**Goal:**

* Increase the pass rate for grievances to 95%
* Decrease the amount of time coaches have to spend reviewing/approving grievances before they are submitted

**Learning Gap and How It Will Be Closed:**

There are 3 training components that are needed for Advocates to be successful:

* 1. What grievances are, why they are important, and the different types
  2. How to complete grievances in the system – how to decide if a grievance should be completed at all, using the compliance tool, job aids, check between systems, answer questions/choose appropriate drop downs, and documenting appropriately with all needed information
  3. How to critical think -identifying when a grievance should be filed, ask probing questions to gather all necessary information, and identifying the root cause of the issue to include in the grievance filed in the system

The current training from UHC addressed #1 and does not address #2 or #3 at all, thus creating a gap. This proposed plan will fill that gap and address all 3 components.

**Training Audience:**

* New Member Service Advocates
* Existing Member Service Advocates
* Coaches (limited)

**Course Objectives:**

Upon completion of this program, Advocates will be able to:

1. Identify the different types of grievances and when each would be used
2. Use critical thinking to identify ques on a call, ask probing questions, and determine root cause of a complaint to determine if and when a grievance should be filed
3. Obtain information necessary to submit a passing grievance, including utilizing other systems or tabs and obtaining all necessary information from the caller
4. Select appropriate fields and fill in all necessary information when filing a grievance
5. Use the Compliance Tool appropriately when needed
6. Use the Knowledge Base/Job Aids appropriately when needed
7. Submit a passing grievance

**Design Considerations:**

* Instructor-Led with the majority not being self-paced (there may be 1 hour of self-paced eLearning instruction)
* Activities and discussions will be as a class, in groups, in pairs, or individual depending on the activity but will be facilitated and monitored by the instructor
* Advocates will receive feedback on their practice exercises and will be evaluated against the criteria used to evaluate grievances on the training floor so that they know what is expected of them
* Fun and engaging

**Training Components:**

1. **New Hire Compliance Training Component**

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| **Modality** | **Topics** | **Timing** | **Activities** | **Deliverables** | **Items Needed From X** |
| ILT (Lessons will be modular so they can be pulled out for Existing Advocate training) | * What grievances are * Why they are important * Different types of grievances * Critical thinking/probing questions * Identifying root cause * Gathering all necessary information from a call * Completing a grievance in the system * How to use other systems/tabs to complete grievance * How to use Compliance Tool * How to use Job Aids/Knowledge Base * Criteria for passing/failing grievances | 2 days | Instructor walk through of one (or more) grievance call(s) - Critical thinking, asking probing questions, completing the grievance, using various systems with breakouts for each topic)  Evaluation form review and grievance grading (pass/fail) – could be as a class or in groups  Practice scenarios – entering grievances into the system and a partner evaluates  Group discussion/activities around:   * Critical thinking * Root Cause Analysis * Probing Questions | * Facilitator Guide * Participant Guide * Materials / Handouts for activities * Possible eLearning component | * Call recordings * Sample grievances * Evaluation form * List of top mistakes made and quick fixes * Grievance Templates |

1. **Existing Advocate Training Component**

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| --- | --- | --- | --- | --- | --- |
| **Modality** | **Topics** | **Timing** | **Activities** | **Deliverables** | **Items Needed From X** |
| ILT  (Compressed version of modular New Hire Compliance Training with the lessons/topics that existing Advocates need – i.e. if there are 10 lessons/topics in New Hire Compliance, 5 may be pulled out to use for existing Advocates as is – there will be no customization for Existing Advocates)  Lessons will be modular and can be used as stand-alone modules, if needed | * Critical thinking/probing questions * Identifying root cause * Gathering all necessary information from a call * Completing a grievance in the system * How to use other systems/tabs to complete grievance * How to use Compliance Tool * How to use Job Aids/Knowledge Base | Not sure yet – it may be spread out over a period of time | Same as New Hire Compliance Training (not a new product) | Same as New Hire Compliance Training (not a new product) | Same as New Hire Compliance Training (not a new product) |

1. **OJT (On the Job) Training/Coaching**

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| **Modality** | **Topics** | **Timing** | **Activities** | **Deliverables** | **Items Needed From X** |
| Coaching session(s) with Coach | * Top grievance mistakes * Using the Compliance Tool, Job Aids/Knowledge Base, other systems, and all available resources * Criteria for approving/denying grievances | Not sure yet – it may be spread out over a period of time during Training period after New Hire | On the Job coaching for Advocates using the Coaching Guide (spread out over training period after New Hire)  Advocates use Job Aid/Checklist provided to them | * Short coaching guide for Coaches (this could be developed into something larger but we don’t have time) * Cheat Sheet / Checklist to use when completing a grievance * Top 10 grievance mistakes and resolutions / FAQ * Checklist/guidance for coach on approving/denying grievances | * Evaluation Form * Top 10 mistakes advocates make * Grievance Templates |

**Proposed Timeline:**

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| --- | --- | --- | --- |
| **Week of…** | **Theme** | **Activities** | **Deliverables** |
| 2/19 | Analysis/Early Design | * Emails/Calls with X * Start design document | None |
| 2/26 | Design | * Detailed Design Document completed * Detailed Design Document reviewed and approved * Development of New Hire Compliance Training started | Detailed Design Document |
| 3/5 | Development | * Development of New Hire Compliance Training | None |
| 3/12 | Development | * Development of:   + New Hire Compliance Training   + Existing Advocate Compliance Training (Pull from New Hire)   + OJT (On the Job) Training Component | Draft of All Materials |
| 3/19 | Development, Review, and Sign Off | * Review of all materials by X * Changes made * Sign off by X | Final Materials |

**Cost:**

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| --- | --- | --- |
| Deliverable | Hours | Cost |
| 2 Day ILT with no eLearning component (6.5 hours/day of instruction after lunch and breaks) | **130 hours**  10 hours/1 hour of instruction X 13.5 hours of instruction) | **$7800** |
| 2 Day ILT with eLearning Component – Level 1 (very minimal if any user interaction – “page turner” type course) **\*\*** | **185 hours**  ILT = 10 hours/1 hour of instruction X 12.5 hours of instruction) = 125 hours  eLearning – Level 1 - 60 hours | **$11,100** |
| 2 Day ILT with eLearning Component – Level 2 (user interaction, more visually pleasing and engaging) **\*\*\*** | **250 hours**  ILT = 10 hours/1 hour of instruction X 12.5 hours of instruction) = 125 hours  eLearning – Level 2 – 125 hours | **$15,000** |
| On the Job Training/Coaching Component | **15 hours** | **$900** |
| Travel Time to X Site for Design Meeting | **10 hours**  (This is strictly travel time – time on-site at X is included in the above estimate) | **$600** |

**\*\*** In order to execute this option, I would have to employ additional assistance on my end which is included in the price quote above. If you would like to provide additional assistance, I would need around 25-50 hours over the course of the project, and that could be deducted from the quote.

**\*\*\*** In order to execute this option, I would have to employ additional assistance on my end which is included in the price quote above. If you would like to provide additional assistance, I would need around 90-115 hours over the course of the project, and that could be deducted from the quote.