Best Practices - Training

This page describes some of the best practices for training FLWs learned during previous projects.

Training Preparation

Planning

- Ask questions about FLW literacy, experience with mobiles, accessibility to training sites, availability for dates and take these factors into consideration when planning dates, length of training, training approach, and schedule.
    - Be conscientious of trainee group size. Implementers have found that a maximum number for effective training is around 15-20 per lead trainer.
    - Try to avoid trainings that are too long (i.e. no more than 8 hours every day).
        - Some implementers have experienced a higher capacity of the trainees to learn and absorb concepts with shorter days, particularly in the morning.
- Create a training schedule. Share with everyone involved, trainees and stakeholders, so they understand what is going on.
- Request permissions for training dates (in many cases, government authorities).
- Notify any government stakeholders of training dates. Invite them to attend.

Participants

- List of FLWs to be trained should be established. Double check spelling of names.
- Complete bulk mobile user registration should be completed. Double check spelling of names and userIDs
- List of all trainers and project staff supporting training should be established.
    - There should at least be a co-facilitator to support the lead trainer.

Training Space

- Identify training space. Make sure the training is at a location which is not too noisy and is relatively easy for FLWs to reach
- Ensure there are sufficient tables and chairs.
- Find out if there is a projector or power supply available. If there is electricity, you can consider using a projector as well, but be sure to have a backup plan!

Logistics

- Plan meals and logistics for lunch and tea breaks
- Bring an easel/stand for the paper diagrams with sufficient chart paper.
- Bring lots of markers (whiteboard and/or permanent)

Mobile Phone Set-up

- Charge all phones. They come out of box with some battery, but not sufficient for the duration of the training.
- Label all phones (inside of the cover) with FLW's name, and userID. Include an inventory code if used.
- Register and activate all SIMs by inserting them into the phone.
- Ensure each phone has an SD card. Re-name the SD card with the FLW's name if there's time.
- Ensure that there is sufficient mobile credit/balance prior to training. Sometimes new SIMs are pre-loaded with a small balance. During set-up, network tests, and certain SMSs may need to be sent that will deplete the pre-loaded credit, not to mention credit will be used up during training as well. It is recommended that implementers re-charge the mobiles with the agreed upon re-charge balance at the end of training.

Application Set-up

- Ensure date and time are correct on all phones. Default date/times are not correct.
- Install the application and media, if applicable. (For Java, use phone2phone installation, so all phones can start out with the same practice data.)
- Set up demo data on source phone if applicable.
- Login or restore with the username for each phone.
- Set up shortcut key access for application.

Materials

- Develop training materials
- Translate materials. Give at least 2-3 weeks for translation requests and another week to review translations for quality.
- Create an attendance/sign in sheet.
- Create Name Tags
- Print a spreadsheet of all FLWs, their usernames and passwords for reference for troubleshooting during training.
- Print phone agreement/contract for each FLW.
- Print manuals for FLWs (if project budget allows).
- Print trainer's guide for each trainer.
- Print Certificate of training completion for each FLW

During Training

- **Roles and Responsibilies**
    - Establish clear roles and responsibilities between the lead trainer and the co-facilitator. Typically, the lead trainer is up in the front leading sessions, providing instruction to the FLWs, determining the pace of the schedule. The co facilitator actively supports FLWs who need support or guidance around the room. They can also keep track of time, provide suggestions to the lead trainer in case they can

move faster or should slow down, or if they're running over time. They can help set-up materials needed for each session, navigate any powerpoint presentations and troubleshooting as needed.

- **Using Aids**
  - Use a speaker attachment for mobile phone for CommCare applications using audio recordings.
  - Use drawings:
    - Create a large picture or drawing of the specific phone used in the project.
    - Create or get a picture of the local alphabet.
    - Using drawn diagrams of the screen is really helpful for teaching CommCare workflow.
  - If using powerpoint, ask the co-facilitator to help navigate the slides while the lead trainer takes FLWs through the material.
- **Training Beyond CommCare**
  - *Interpersonal Communication:* Explain and show HOW the phone should be used for better client engagement, not just what the content of the application is. This involves discussing good interpersonal communication skills during the training. For example, images on the phone should be shown to the client; FLW should sit next to the client, so both can easily see the pictures; emphasize when the form should be filled out (during the visit, or after).
- **Ways to Make Trainings Fun**
  - Use an icebreaker to get everyone moving around and engaged. Example: Each person says their name and acts out what they typically use their mobile phones or why they like being a CHW. See the following presentation for more examples on ice-breakers and energizer activities (link). Note: The rate scale is based on time and effectiveness, but judged by personal experience from field trips.
  - Use role-play group activities, which can facilitate great small group interaction and learning.
    - Examples:
      - Groups of 3 work well (mock CHW, mock client, and observer).
      - Have two FLWs role-play a home visit without CommCare before the training begins and one with CommCare at the end of every day, demonstrating the use of a different form each time.
    - Make sure not to facilitate the interaction too much. This can create dependency on your involvement.
  - Try to apply the story-telling approach.
    - Showing how to use the mobile tool is not enough. It is equally important to reinforce the user's understanding and knowledge of the content, give guidance on how to counsel on these points and teach this material if necessary. With use, the content itself will reinforce training and ASHAs will adapt the counseling prompts to best suit her needs.
  - Incorporate fun "energizer" activities and games to keep participants engaged and to break up long sessions. See this document for some great suggestions. Please add your new ideas to the document!
- **Training Specific Features**
  - For QWERTY or full keyboard style phones some additional training tips include:
    - Agree on a common language for different functions on the phone and always refer to the buttons on the phone using this terminology. In a full-keyboard phone, there are several keys, the center or "Enter" function, and option buttons and orienting the FLW to these different keys is critical. Role play or continue to review these keys as you move through the training
    - One benefit of learning this type of keyboard is that it translates well into a computer. We used this idea to get FLWs excited about learning a more challenging phone
  - Make sure to spend enough time on case management (if relevant):
    - Case/client management is hard. It requires them:
    - to be able to type,
    - to understand the concept of giving/assigning an ID to a client,
    - to understand the concept of registering and following up with a specific client, and
    - to learn a more complicated CommCare work flow (selecting clients screen, client confirmation screen).
  - Start teaching FLW how to type early (if relevant):
    - Ask them to compose an SMS
    - As a requirement for a case management registration form, the FLWs have to learn how to type on the phone. Instead of spending a large chunk of time trying to learn all at once, we had success with daily short practice sessions.
    - Most FLWs have never entered text on the mobile phone. It is best to focus on forms without free form entry on Day 1 of training and then allocate sufficient time to practice entering free form text for registration forms on Day 2. Similarly, focus on application content on Day 1 and dive into client management (opening and closing cases) on Day 2.
    - You may create demo cases prior to training day on the trainer's phone. Then use the Phone2Phone installation method to carry over the demo cases to the applications that will be used by the trainees. This will ensure all users will have the same practice cases in demo mode. This will also give the users a set of cases to work with on Day 1 and learn the basic navigation. In the next training session, they can dive into more advanced text input and try to create their own cases.
  - Demonstrate skip-logic well and often.
    - Skip-logic is a new concept. In training, all questions with skip-logic enabled need to be demonstrated well and often. This will avoid confusion later on in the field.
    - Use examples, demonstrate the different branching to them during training.
  - Date questions: there are two entry modes: calendar and manual. Calendar is only useful if the intended date will always be weekly from today, otherwise the calendar entry is too difficult. Generally go with manual entry.
- **Ideas for Low Literate FLWs**
  - Involving family members during training.
    - For some programs, FLWs who needed more support using CommCare due to literacy barriers were encouraged to bring one family member to the training (i.e. husband, sister, older child). We haven't observed carefully enough to note if the husband's presence subdues the woman's interaction or whether husbands are asking questions. So far, of the few observations we've made, husbands usually just listen as an observer and jump in when he feels he needs to or is encouraged to contribute and/or support.
  - Pair up FLWs! Usually older FLWs struggle with learning how to use phones (but not always!) and younger FLWs pick it up quickly. Pair them up during training so that they can help each other.
- **Training Approach**
  - Be encouraging and engaging throughout training sessions to ensure a positive response.
  - Establish a phrase in the beginning to get everyone's attention. Example: When the trainer says "Are we together?". Everyone raises their hands in response and replies "Yes we are together!" Now that you have their attention, and their phones are placed down, you can continue to give instructions.
  - When working with users who aren't familiar with phones, don't take any part of using a phone as intuitive. Don't take anything for granted. Try to go through everything as though you yourself are using a phone for the first time. Encourage older users that they can definitely learn how to use the application with just a bit of practice.
  - Make sure to go through trainings slowly and deliberately to prevent losing people.

- Don't be afraid to remove non-essential parts of the training plan if you're having to turn down the pace of training. This happens. Stick to the most crucial stuff in the limited time you have.

General Use of CommCare Android

- Teach that the way to scroll between questions by moving your finger across the top of the screen, where the question text is. This prevents the user from accidentally selecting something in a question, or from thinking they accidentally selected something.
- Save forms as "complete" unless there is a compelling use case for saving that as incomplete and re-opening them later. That gets complicated quickly.
- There aren't many buttons on the phone, so may as well spend a bit of time learning what they do. Focus on the home, back, and on/off button. Review how to get the phone out of "sleep" or "locked" mode. Don't worry much about the settings button unless there is a specific reason (i.e. they will have to change languages or will need to jump around in the question list, etc.)
- Be gentle with the phone - practice just how to touch the phone and navigate. Emphasize you don't have to touch the screen very hard and you don't want to swipe through everything too fast. If you try to swipe with a fingernail it won't work as well as if you use the thick part of your fingertip.
- Teach that when you are done with your work for the day you should press "sync now" once to make sure all of your data has been submitted to the server.

Troubleshooting Training

There are a lot of things that a user can accidentally do while using CommCare that they can think is a bug or technical issue. Training against these types of common but simple errors can save a lot of time in troubleshooting later on.

- **Incorrect Log-in:** When you are first training how to log in to CommCare it can be useful to give everyone a wrong password so that they all see what happens when they try to enter the wrong code.
- **Accidentally Exiting a Form:** When you are working in a form it is common to accidentally hit the "back" button and get the Save/Ignore/Cancel message. It is important to review this early on and frequently. Train users that when they see this pop up they should treat it as a stop sign and think carefully about what they want to push. CANCEL is always the safe option because it just returns you to the form. IGNORE CHANGES is appropriate only when you want to get rid of everything you have entered in the form.
- **Accidentally Exiting CommCare:** When filling out a form a user may accidentally push the "home" button on the phone and return to the phone's main screen. While it is likely if they click on the CommCare icon they will return to where they left the form, this is not the safest way. The best is to long-push the home button until the recently-opened programs menu appears, and then to choose CommCare from that list. Have users practice this several times during the training.
- **Text Entry- Hitting "Enter" Too Many Times:** If a user is trying to fill in a text box and hits the enter/hard-return button too many times, the whole screen will be filled with a blank box. A fun way to train on this is to take everyone's phones and quickly recreate this. Then let people try to figure out what is wrong. Remind users that when they are confused they should always try to scroll up and down. It is easy for the users to accidentally hit the hard-return button because it is right next to the period, delete, and other keys they might need frequently and want to press multiple times.
- **Text Entry- Hitting the Keyboard Toggle Key:** When users toggle their keyboard into numeric mode there is often an option to change the keyboard again in order to see other symbol keys. Sometimes this key looks like (1/3) and allows the user to toggle among three different keyboard configurations. When done accidentally the user may find that when trying to access the numeric keyboard it instead looks like a bunch of happy faces or other symbols. It can again be fun if the trainer makes this configuration change on all the phones and lets people try to figure out how to correct it prior to discussing with everyone.
- **Text Entry- Hitting the Keyboard Settings Button:** On some phones the keyboard settings key is unfortunately very close to "period" and "space" keys and users often accidentally click on the settings key which brings up a menu. If typing fast it is easy to not just open this menu but to accidentally click on something inside of it. For this reason it can be useful to have everyone intentionally open the keyboard settings menu and see how everything is set. The trainer can even explain what some of the settings mean (i.e. what is T9 predictive text and why do we keep it off).
- **Force Close Error Message:** We certainly hope that it never happens, but all programs crash at some point. In CommCare this can cause a "Force Close" error message. This is a pop-up that says something like "Sorry! The application CommCare(process org.commcare.dalvik) has stopped unexpectedly. Please try again." with options like "Force close", "Wait", and "Report". When this message comes, the first option is to press "Wait" if available and see if the program is just stuck. If that doesn't work, or the "wait" option is not available, and if the users are comfortable enough with the phone then they can "report" the problem. A message box will pop up and in that the user should write their project's name and any other details about what they were doing when the error message popped up. They should then send/submit the error report. During training also encourage your users to report any such errors to their supervisors so that they can be reported to the CommCare staff for analysis.