



**HELSEPLATTFORMEN**  
for pasientens helsetjeneste

**Procurement of an  
EHR solution  
with adjacent systems and services**

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**Invitation to Dialogue**

T Appendix 1D Training Requirements

Based on SSA-T

**Case number: 2016/238**



## History

Version	Responsibility	Date	Comments/Changes
v1.0	Helseplattformen	02.02.17	Version v1.0 shared with the Contractors

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# 1 INTRODUCTION

## 1.1 GENERAL

This Appendix contains the Customer's training requirements for the procurement of an **electronic health record (EHR)** solution with adjacent systems and services for the Central Norway Health Region.

The Customer expects the Contractor to have read this Appendix in conjunction with the other ITD documents, and in particular *Appendix C0*, and to reflect upon how to best support the Customer's ambition and objectives for the new EHR solution, cf. *Appendix C0, Chapter 2*, when answering this Tender. The Requirements Specification for the EHR solution that will enable the Customer to reach this ambition are described in:

- *SSA-T Appendix 1A General requirements*
- *SSA-T Appendix 1B Functional requirements*
- *SSA-T Appendix 1C Technical requirements*
- *SSA-T Appendix 1D Training requirements*

Note that in general, all deliveries and pre-requisites or assumptions relevant for the implementation of the EHR solution, both related to the Contractor's Deliverables and the Customer Furnished Assets (CFA), cf. *Appendix C7*, shall be taken into account in the Contractor's Project and Progress Plan, cf. *T Appendix 3*.

The ITD documents describe the starting point for the competitive dialogue and may be altered based on proposals from Contractors. When the dialogue phase is concluded, the Customer will issue a final set of ITD documents that the Contractor shall base its final offer upon. It is not permissible to negotiate the final offers. Only clarifications, specifications and fine-tuning are allowed, see FOA § 20-9.

To assist Contractors in completing their responses supporting text in the form of instructions or examples have been included in the documents. These supporting texts will be replaced, reformatted or deleted before signing of the Contract.

## 1.2 LIST OF ANNEXES FOR THIS APPENDIX

N/A

## 1.3 COMPLETION OF THE VARIOUS DOCUMENTS

The Contractor shall answer the Customer's Requirement Specification in accordance with the instructions set out in the ITD Document and below. In order to ensure equal treatment and an efficient dialogue it is important that the instructions are adhered to.

Table 1 below depicts the template where the Requirements Specifications are set out. In Table 2 below the various columns are explained.

Table 1 - Requirement table

**Imp:** Importance (O/H/M/L), **ToF:** Time of fulfilment (1/2/3/4), **D:** Describe (D/DX), **Doc:** Documentation (DC, SC, DT, A, I, O), **ToReq:** Type of requirement (C, H, M, GP, P)

No.	Requirement	Imp	ToF	D	Doc	ToReq
	<p><b>Requirement title</b> Requirement</p> <p><b>Dedicated area/function [only relevant for T Appendix 1B]:</b></p> <ul style="list-style-type: none"> <li>• XX</li> </ul> <p><b>To be considered [only relevant for T Appendix 1B]:</b></p> <ul style="list-style-type: none"> <li>• XX</li> </ul>					

Table 2 – Explanation of requirement table

Field	Description
No.	<p>The Customer's unique identifier of a requirement. All references to requirements shall be done using this number.</p> <p>Requirements set out under the Delivery Contract are numbered as follows:</p> <ul style="list-style-type: none"> <li>• Gn (G1, G2, ...) for General requirements (T Appendix 1A)</li> <li>• Fn (F1, F2, ...) for Functional requirements (T Appendix 1B)</li> <li>• Tn (T1, T2, ...) for Technical requirements (T Appendix 1C)</li> <li>• Dn (D1, D2, ...) for Training requirements (T Appendix 1D)</li> </ul> <p>Requirements set out under the Maintenance Contract are numbered as follows:</p> <ul style="list-style-type: none"> <li>• Vn (V1, V2, ...) for all requirements (V Appendix 1)</li> </ul>
Requirement	<p>The Customer's specification of the requirement.</p> <p><u>The following applies to T Appendix 1B only:</u></p> <ul style="list-style-type: none"> <li>• The "<b>Dedicated area/function</b>" denotation is the Customer's indication of whether a given requirement is associated with multiple enterprise capabilities and sub-capabilities (cf. <i>T Appendix 1B, Chapter 2</i>) and/or areas of particular focus (cf. <i>T Appendix 1B, Chapter 4</i>). The Contractor shall when describing its response to a requirement, ensure that the description at least covers the listed denotations (enterprise capabilities and sub-capabilities and/or areas of particular focus). The Contractor is encouraged to include other relevant capabilities and/or areas of particular focus not specifically listed. If the response is the same for two or more denotations, the Contractor is asked not to duplicate the response, but simply to explain which denotations the response is valid for.</li> <li>• The "<b>To be considered</b>" denotation indicates that the Customer is yet undecided whether the given requirement is relevant for the subsequent enterprise capabilities and/or areas of particular focus. This decision will be made during the dialogue phase.</li> <li>• The "<b>Integration</b>" denotation is the Customer's indication that an integration with an external or third party system will be required for the given requirement. If several enterprise (sub-) capabilities are listed under the "Dedicated area/function" for the given requirement, the integration might be relevant for one, several or all of them.</li> </ul>
Imp (Importance – O/H/M/L)	The Customer's guidance on the importance of the requirement:

Field	Description
	<ul style="list-style-type: none"> <li>• O – Obligatory. All obligatory requirements <b>must be satisfied</b>. If requirements with this classification are not satisfied, the <b>proposal will be rejected</b>.</li> <li>• H – High importance. It is very important that the requirement is satisfied. At least 80 per cent of these requirements must be satisfied after the dialogue phase is completed (i.e., in the best and final Tender), cf. <i>ITD Document, Chapter 25.2</i></li> <li>• M – Medium importance. It is important that the requirement is satisfied.</li> <li>• L – Low importance. The requirement is desirable but it is less important that the requirement is satisfied.</li> </ul>
ToF (Time of fulfilment – 1/2/3/4)	<p>The Customer’s deadline for fulfilment of the requirement:</p> <ul style="list-style-type: none"> <li>• 1 – Within delivery of the initial proposal</li> <li>• 2 – Within delivery of the final proposal</li> <li>• 3 – Within start of the Customers’ acceptance test, as set out in the implementation plan for Helseplattformen Main Project, cf. <i>T Appendix 3</i> and in accordance with the test and approval procedures set out in <i>T Appendix 4</i></li> <li>• 4 – Other. Individual deadline set out in the particular requirement (This applies especially for areas where the Customer and Contractor need close cooperation to decide the date of fulfilment)</li> </ul> <p>Note that where the deadline for fulfilment is later than the time of submission of the Tender, the compliance with the requirement will be considered based on the submitted documentation.</p>
D (Describe – D/DX)  and  Confirm requirement	<ul style="list-style-type: none"> <li>• D - The requirement denotation “D” indicates that the Contractor must describe how the requirement is satisfied. The description for a requirement specification denoted “D” should not exceed 4 A-4 pages, including documentation, unless otherwise specified.</li> <li>• DX – The requirement denotation “DX” indicates that the Contractor must provide a short description of how the requirement is satisfied, limited to a maximum of 1000 characters per requirement. The Contractor may at a later stage of the dialogue phase be asked to give a more detailed or complete description of the same requirement.</li> <li>• N/A – The requirement denotation “N/A” indicates that the requirement is a “confirm requirement” where the response shall be Yes/No in <i>T Appendix 2A2 – 2D2</i> and <i>V Appendix 2A2</i></li> </ul> <p>Note that the Contractor shall as part of the response to the particular requirement requiring development describe the scope and size of development and the time schedule for that development. In the list of requirements requiring development that is to be submitted in <i>Appendix C0, Annex 2</i> and taken into account in the Contractor’s response to <i>Appendix C2</i>, reference shall be made to this description. For requirements requiring development the Contractor shall fill out the columns related to development in <i>T Appendix 2A2 – 2D2</i> and <i>V Appendix 2A2</i>.</p>
Doc (Documentation of requirements – DC, SC, DT, A, I, O)	<p>Requirements for type and extent of documentation of a requirement:</p> <ul style="list-style-type: none"> <li>• Declaration of Confirmation (DC) – the requirement shall be demonstrated by a declaration issued by the Contractor</li> <li>• Standard Certification (SC) – the requirement shall be demonstrated by submission of a certification of coherence to a standard</li> <li>• Demonstration/Test of requirement (DT)</li> <li>• Analysis (A) - a reasoned explanation</li> <li>• Information (I) (The requirement is to deliver specified types of information as opposed to answer out functional and technical requirements)</li> <li>• Other (O) – the type of documentation is particular specified for the relevant requirement</li> </ul> <p>A requirement may desire one or more of the above types of documentation.</p> <p>Note that the required documentation may be separate, both in type and extent, for the purpose of evaluation and test and acceptance.</p>

Field	Description
ToReq (Type of requirement – H, M, GP, P, C)	<p>“Type of requirement” identifies what entity the particular requirement is relevant for. For the purpose of this procurement the following categories are applicable:</p> <ul style="list-style-type: none"> <li>• Hospital ( HMN ) = H</li> <li>• Municipalities (“Kommune”) = M</li> <li>• General Practitioner (“Fastlege”) = GP</li> <li>• Citizens/Patient = P</li> <li>• Common for requirement for H , M , GP = C</li> </ul> <p>Other entity combinations will be marked by combining these indicators.</p>

## 1.4 BACKGROUND AND PURPOSE OF THIS APPENDIX

This document presents the Customer’s requirements regarding training.

## 1.5 DEFINITIONS

Terms and expressions with capital letters shall have the meaning set out in *Appendix C4*. Terms marked with **bold, italic font** are terms that the Customer has wished to provide an explanation of to ensure a common understanding, cf. *Appendix C4*. These terms and definitions should be interpreted in the context of this specific procurement, and are not intended to be general definitions beyond this scope. The terms are in addition to cf. *Appendix C5, Annex C – Glossary of Terms for EHR-S FM*.

## 1.6 STRUCTURE OF THIS APPENDIX

The structure of this Appendix is presented in the following table:

*Table 3 - The structure of this Appendix*

Chapter 2: <b>Training</b>	This Chapter focuses on training activities and methodology, Customer’s rights, administration of training, e-learning/self-learning and documentation of training.
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## 2 TRAINING

This Chapter focuses on training activities and methodology, Customer’s rights, administration of training, e-learning/self-learning and documentation of training.

The Customer expects the Contractor’s recommendations when it comes to training methodology, training activities, what types of roles that need to be trained and the volume of training. The Customer’s expectation is that training activities for the end-users mainly will be carried out by the Customer’s organisations (using a “Train the Trainer” principle). To provide a coherent impression of the necessary training activities needed, the Customer expects an overview of what activities are suggested to be the Contractor’s responsibility and what should be the Customer’s responsibility.

The Customer expects an intuitive solution that can be used, operated and maintained with a minimum of training. The Customer’s ambition when it comes to training is an appropriate and purposeful training in a way that allows activities to be carried out optimally and efficiently. This implies a timely initiation and completion of training activities as well as a flexible approach to

training that facilitates the needs of the different actors and users. It is important that the training time schedule takes into account ordinary operations with patient care, practical considerations based on characteristics of the Customer as well as reflecting the proposed Project- and progress plan for Helseplattformen Main Project (referred to as "HMP") cf. *T Appendix 3*.

In addition to requirements in this Appendix, there are requirements that affect training in:

- *T Appendix 1A, Chapter 2, Language*
- *T Appendix 1A, Chapter 3, Documentation*

## 2.1 TRAINING METHODOLOGY AND PROCESS

**Imp:** Importance (O/H/M/L), **ToF:** Time of fulfilment (1/2/3/4), **D:** Describe (D/DX), **Doc:** Documentation (DC, SC, DT, A, I, O), **ToReq:** Type of requirement (C, H, M, GP, P)

No.	Requirement	Imp	ToF	D	Doc	ToReq
E25981	<b>Training methodology</b> The Contractor shall in T Appendix 2D1 describe the Contractor's methodology for training.	H	2	D	DC	C
E25982	<b>Measuring training fulfilment and quality</b> The Contractor shall in T Appendix 2D1 describe how to evaluate and measure fulfilment and quality of training. As an example this can be a description of relevant baseline and which metrics can be a basis for evaluation.	M	2	D	DC	C
E25983	<b>Example of training from relevant project</b> The Contractor shall in T Appendix 2D1 provide an example from a relevant project of a relevant plan for training including a time schedule.	M	2	D	I	C

## 2.2 CUSTOMER'S RIGHTS

**Imp:** Importance (O/H/M/L), **ToF:** Time of fulfilment (1/2/3/4), **D:** Describe (D/DX), **Doc:** Documentation (DC, SC, DT, A, I, O), **ToReq:** Type of requirement (C, H, M, GP, P)

No.	Requirement	Imp	ToF	D	Doc	ToReq
E25984	<b>Customer's rights to conduct and implement training</b> The Contractor confirms that the Customer has the right to implement training activities with use of internal and/or external expertise.	H	2	N/A	DC	C;P

## 2.3 RECOMMENDED TRAINING ACTIVITIES

**Imp:** Importance (O/H/M/L), **ToF:** Time of fulfilment (1/2/3/4), **D:** Describe (D/DX), **Doc:** Documentation (DC, SC, DT, A, I, O), **ToReq:** Type of requirement (C, H, M, GP, P)

No.	Requirement	Imp	ToF	D	Doc	ToReq
E25985	<b>Recommended grouping of training participants</b>	M	2	D	DC	C



No.	Requirement	Imp	ToF	D	Doc	ToReq
	<p>The Contractor shall in T Appendix 2D1 describe recommended groupings of participants with equal need for training.</p> <p>The recommended groupings shall take into account different needs based on for example user roles, professions, organisations and level of care and participation in HMP.</p> <p>A description of the organisational structure and situation can be found in <i>Appendix C0</i>.</p>					
E25986	<p><b>Recommended training activities for groupings of participants</b></p> <p>The Contractor shall in T Appendix 2D1 describe which training activities that is recommended for the groupings of participants. This shall be based on the Contractor's recommended grouping of participants.</p> <p>This description shall classify the need for the various training activities, such as distinguishing between shall/should or may completion of various activities.</p>	H	2	D	DC	C
E25987	<p><b>Responsibility for providing training</b></p> <p>The Contractor shall in T Appendix 2D1 describe the recommended distribution of responsibility between the Contractor and Customer for providing training activities.</p>	H	2	D	DC	C
E25988	<p><b>Overall time schedule for recommended training activities</b></p> <p>The Contractor shall in T Appendix 2D1 describe the overall time schedule for recommended training activities to different user groups. This shall reflect the timeline and milestones set out in the Project- and progress plan in response to <i>T Appendix 3</i>.</p>	H	2	D	DC;I	C

## 2.4 E-LEARNING AND "SELF-TRAINING"

**Imp:** Importance (O/H/M/L), **ToF:** Time of fulfilment (1/2/3/4), **D:** Describe (D/DX), **Doc:** Documentation (DC, SC, DT, A, I, O), **ToReq:** Type of requirement (C, H, M, GP, P)

No.	Requirement	Imp	ToF	D	Doc	ToReq
E25991	<p><b>Self-training courses</b></p> <p>The Contractor shall in T Appendix 2D1 describe which e-learning or other "self-training" courses that are offered.</p>	M	2	D	DC	C;P
E25992	<p><b>Standards for e-learning</b></p> <p>The Contractor shall in T Appendix 2D1 describe which standards they support for their e-learning modules (e.g., Scorm 1.2, Scorm 2004 4th edition,).</p> <p>If different e-learning courses support different standards the Contractor shall outline this in T Appendix 2D1.</p> <p>Additional information: Scorm 1.2, Scorm 2004 4th edition, standard for e-learning, cf. <i>Appendix C6, ID SG21</i>.</p>	L	2	D	DC	C
E25993	<p><b>End-users' self-training</b></p> <p>The Contractor shall in T Appendix 2D1 describe how the solution support the needs for <i>end-users'</i> self-training.</p>	M	2	D	A;DC	C
E25994	<p><b>Customisation of e-learning courses</b></p>	M	2	D	DC	C



No.	Requirement	Imp	ToF	D	Doc	ToReq
	The Contractor shall in T Appendix 2D1 describe how e-learning courses can be customised by the Customer to meet local needs (e.g., adaption to local processes, integrated systems and local terminology).					

## 2.5 TRAINING DOCUMENTATION

**Imp:** Importance (O/H/M/L), **ToF:** Time of fulfilment (1/2/3/4), **D:** Describe (D/DX), **Doc:** Documentation (DC, SC, DT, A, I, O), **ToReq:** Type of requirement (C, H, M, GP, P)

No.	Requirement	Imp	ToF	D	Doc	ToReq
E25995	<b>General requirements for training documentation</b> The Contractor confirms that training documentation shall follow the requirements regarding general documentation, cf. <i>T Appendix 1A, Chapter 3</i> .	M	2	N/A	DC	C
E25996	<b>Delivery of training documentation</b> The Contractor confirms that training documentation will follow the requirements regarding delivery of documentation, cf. <i>T Appendix 1A, Chapter 3</i> .	M	2	N/A	DC	C
E25997	<b>Availability of training documentation</b> The Contractor confirms that all training documentation that will be used in training activities shall be delivered to the Customer.	H	3	N/A	DC	C
E25998	<b>Training documentation for instructors</b> The Contractor shall in T Appendix 2D1 describe all relevant training documentation for the instructors of the different training activities where the Customer is responsible.	M	2	D	DC;I	C
E25999	<b>Training documentation for participants in training</b> The Contractor shall in T Appendix 2D1 describe all relevant training documentation for the participants of the training activities.	M	2	D	DC	C
E26000	<b>Training documentation for different user groups</b> The Contractor shall in T Appendix 2D1 describe how the training documentation can be adapted according to the different groupings defined in the Contractor's response to recommended grouping of training participants, cf. <i>Chapter 2.3</i> .	M	2	D	DC	C