

Training Plan (Sample)

Optum Rx provides a comprehensive training program that includes curriculum and course materials to support the Training Plan approved by the State. The Training Plan will record all training activities throughout the life of the engagement. Our training program to assure the targeted audience's educational success.

Optum Rx understands training is a key success. We offer many methods of training and education, including a web portal, virtual educational programs using online meeting tools, targeted documents and communication, and on-site training as needed.

Optum Rx assures that all curricula and materials are comprehensive and professionally written for State staff consumption. New training material can be created for each training session based on the need and approved by the State prior to utilization. Training materials offered include some of the following but may not be limited.

- Training manuals
- Instructor guides
- User manuals
- PowerPoint presentations
- Standard Operating Procedures
- Operational system documentation
- Payer sheet specification documents that follow the latest NCPDP version
- Assessments to assure understanding of the training material and learning objectives

Optum Rx offers a secure file-sharing site that will store all approved training materials, scripts, curriculum, reference materials, and other documentation to facilitate easy access by State staff. All information is continuously updated to maintain accuracy.

Pharmacy Benefits Management (PBM) Training Plan

Version 2.0
State of Georgia

Prepared by Optum Rx



Training Plan

Revision History

Revision Level	Effective Date	Description	Change Summary
1.0	05/14/2019	Original Document	N/A
2.0	06/28/2019	Updated per reviewer comments	Updated target training timeline; added 4.2.2 Key Staff Assumptions; added 4.7 Training Environment; added 4.11 Attachments section which includes job descriptions.

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1. Purpose

The purpose of the Training Plan is to provide the approach for training Optum Rx Key Account and Project staff in addition to State of Georgia Staff and other vendors as identified by the State. The plan outlines the activities, timeframes, roles and responsibilities for training the identified individuals in supporting and meeting the requirements of the State, in addition to use of the Optum Rx Pharmacy point-of-sale (POS) system (RxClaim), Drug Rebate system (RxMax), and Reporting System (RxTrack).

2. Scope

The scope of this training plan includes:

- Optum Rx New Hire Orientation
- Optum Rx Transition Employee Training (if applicable)
- Georgia specific job duties for Key Staff
- Georgia rules and state statutes
- External/Internal Formulary, PDL/Criteria documents
- Deliverable frequency and daily operations/clinical actions
- The CMS Payment Error Rate Measurement (PERM) Audit
- CoverRx Enrollment and Application processes
- RxClaim POS System
- Prior Authorization (PAS) System
- RxTrack Reporting Tool
- RxMax Drug Rebate System
- ServiceNow- internal Optum Rx service request and issue tracking
- Training activities for the Optum Rx Clinical (prior authorization) and provider/member (technical) Call Centers will follow internal Optum Rx processes and will be supplemented by Georgia specific requirements.

2.1 Audience

Training of the following groups of individuals

- Optum Rx Key Staff
- Georgia Staff
- Other identified Optum Rx Account and Project Staff
- Other identified stakeholders as identified by Georgia and as required in RFP Section A.41.g.4

2.2 Document organization

This section provides an outline to the organization of the documentation, which includes, but is not limited to:

- Overview
- Training Plan Strategy
- Training Plan Outline

2.3 Referenced documents

- Pharmacy Benefits Management RFP 31865-00600
- RxMax Training Documents
- RxClaim Training Documents
- RxTrack Training Documents
- PAS Training Documents
- Other documents as identified by Georgia

3. Overview

The Training Plan documents and guides Optum Rx's approach to training throughout the life cycle of the project and into operations. The Training Plan covers the approach and methodology for all aspects of training. The Plan will evolve throughout the implementation phase as most Key Staff will not be on-boarded until 60 days prior to go-live, or beginning November 1, 2019.

4. Training plan outline

2.4 Identification of training needs

2.4.1 Approach

This section defines the approach of identifying the specific needs for training Optum Rx Key Staff and other identified stakeholders as required in the RFP and includes the following areas:

- Optum Rx Employee Orientation
- Georgia specific Job requirements for Key Staff including:
 - Georgia rules and state statutes needed for contract compliance
 - Georgia Contract Compliance Tool (OCCP, aka. Serena)
 - The CMS Payment Error Rate Measurement (PERM) Audit
 - CoverRx Enrollment/Application processes
 - External/Internal Formulary, PDL/Criteria documents
 - Deliverable frequency and daily operations/clinical action
- Solution Products (RxClaim ,RxMax, PAS, RxTrack)

- Refresher, Ad hoc training
 - Job specific duties
 - State Plan/Policy changes
 - New releases of Optum Rx's systems that may include new or modified functionality.

2.5 Training responsibilities and assumptions

2.5.1 Responsibilities

Optum Rx shall:

- Coordinate the execution of the Training Plan and Strategy.
- Be the primary author of the Training Plan and Strategy (this document).
- Determine the need for training courses in conjunction with Georgia.

Georgia shall:

- Determine the appropriate Georgia staff for participation in identification of Key Staff Georgia job responsibilities
- Review and approve Training Plan and Strategy (this document).
- Evaluate and coordinate with Optum Rx ongoing training needs regarding objectives for ongoing training (Ad Hoc and Refresher Training).

2.5.2 Assumptions- Optum Rx key staff

Per Section A.7.b- Staff Requirements Specific to Georgia PBM Programs, all key staff are to be hired and trained no less than sixty (60) days prior to go-live. Optum Rx will continue to move forward with the hiring process and final selection of key staff. Should any incumbent vendor staff transition over to Optum Rx, it will be necessary to revise both the 60 day timing requirement and training timeline for the employee(s).

2.5.3 Key staff job descriptions

Attachment A contains the posted job descriptions for Georgia Key Staff.

2.5.4 Policies and Procedures

Optum Rx shall provide account, clinical and operational management during the PBM contract. Optum Rx shall develop and maintain operating policies and procedures manuals and other documentation that clearly and comprehensively documents the operations necessary for supporting Georgia. Georgia has access to the documentation at all times during the contract period. Listed below are the following policies and procedures manuals:

- Call Center Operations Manuals- Georgia specific
- Optum Rx State of Georgia Operations Manual

2.6 Training phases

The training phase outlines the specific phases of the project and the focus of training during the particular phase.

- Optum Rx New Hire Training- all new employees will follow the United Health Corporate on-boarding process. This will include any incumbent vendor employees who may transition to Optum Rx. At a summary level, the orientation process includes:
 - Ensuring Required Paperwork is Completed on First Day
 - Informing Employee of Resources Available to Them
 - Assisting Employee in Enrolling and Joining New Employee Orientation
 - Reviewing Basic Procedures & Expectations
 - Reviewing Required LearnSource Course Assignments, including, but not limited to:
 - HIPAA & Security Training
 - Setting Employee's Business Goals
 - Setting Employee's Individual Development Goals
- Georgia Key Staff Job-specific training- all key staff will participate in any required Georgia training. Job specific training for each position will be developed in coordination with Georgia. Phase 1 will include the identification of job specific requirements for all Key Staff and will be further documented in Operations Manuals. Detailed training will continue to be further defined in later Training Plan updates.

Position	Start Date
Account Director*	TBD
Contract Manager	TBD
Clinical Preferred Drug List Pharmacist	TBD
Clinical Preferred Drug List Pharmacist	TBD
Data Research Analyst	TBD
Clinical Administrative Pharmacist	TBD
Clinical Administrative Pharmacist	TBD
Clinical Administrative Pharmacist	TBD
PBM Claims System Liaison*	TBD
Provider Liaison Pharmacist	TBD
Provider Liaison Pharmacist	TBD
Provider Liaison Pharmacist	TBD
Administrative Technician	TBD

Position	Start Date
Administrative Technician	TBD
Fraud and Abuse Investigator^	TBD
DUR Pharmacist	TBD

*Hired and engaged

^Optum Rx internal employee who will transition

- In addition to any newly hired Optum Rx staff, Georgia and Georgia identified staff will receive system training on the Optum Rx solutions which include:
 - RxClaim
 - Technical Training approach
 - Operational Training approach
 - Prior Authorization System (PAS)
 - Technical Training approach
 - Operational Training approach
 - RxMax- Optum Rx will be responsible for operating the system and as such, training will focus on system overview and reporting. Training dates to be established to coincide closer to start of rebate operations.
 - Technical Training approach- high level overview of processes
 - Operational Training approach- high level navigation and reporting
 - RxTrack- Training dates to be established to coincide closer to start of pharmacy operations.
 - Technical Training approach
 - Operational Training approach
 - Clinical and Technical Call Center
 - Identified Key Staff will be oriented on call center operations

2.7 Training approach

The State of Georgia training materials for Key Staff job responsibility training must be approved by State of Georgia. Because State of Georgia is the subject matter expert for the Georgia specific requirements, Georgia review of the materials is focused on two (2) key areas:

- State of Georgia reviewers shall ensure Optum Rx has customized training to include Georgia specific examples or policies and duties and that these examples make sense.

- State of Georgia reviewers will assess whether the target audience assumed in the Training Plan continues to be appropriate based on the job requirements, and they will assist Optum Rx in confirming the invitee list for each curriculum.

2.8 Facilities and accommodations

In addition to virtual meetings, Optum Rx shall utilize conference rooms located at Georgia State offices:

2.9 Frequency and schedule

The timeline for updating of the training plan is listed below:

Table 1. Training plan update schedule

Activity	Expected Start	Expected Finish
Key Staff Job Descriptions	TBD	TBD
Develop Key Staff Training	TBD	TBD
Identify Georgia Training Needs	TBD	TBD
Develop Georgia Training	TBD	TBD
Identify Other Staff Training Needs	TBD	TBD
Develop Other Staff Training	TBD	TBD
Update Training Plan with Georgia Specific Requirements and deliver to Georgia (Training Plan V1.1)	Post Requirements validation/FIR delivery	TBD
Annual Training Plan Update	Annually	Annually

Training will begin in QX. Additional information to be included in later versions of the Training Plan which will coincide with development and delivery of required operational plans.

Table 2. Staff training schedule

Training Onsite in Georgia	Length/Duration	Date
TBD	TBD	TBD
TBD	TBD	TBD
TBD	TBD	TBD

2.10 Training environment

Optum Rx will utilize the Georgia UAT environment to support RxClaim training. A separate Carrier/Account/Group (CAG) will be established in the Test environment to segregate training members for any other member groups loaded into that environment. Each external trainee identified by the State will require a user ID and Password which is established by Optum Rx.

RxTrack/IDW training will be conducted in the Optum Rx training environment.

RxMax training will be conducted in the Optum Rx test environment.

2.11 Training tools

Optum Rx will utilize the following mediums to support training of all identified individuals:

- Online Training tools
- Web Ex/virtual
- One-on-one
- Onsite classroom

2.12 Training curriculum

Optum Rx shall be responsible for the operation of the PBM solution and meeting the operation and contractual requirements of Georgia. The curriculum for staff training are designed to meet the particular training needs of Optum Rx Key Staff and other identified individuals and has been divided into multiple sections. Optum Rx will continue to define and update the material and curriculum based on further requirements validation and input from the State.

2.13 Training materials

As RxClaim and IDW/RxTrack are COTS solutions and not customized, the overall product training will follow established training protocols. Please see Attachment A as an example of a training document for RxClaim. Optum Rx will work with Georgia to develop any Georgia specific training relative to specific business needs unique to Georgia.

Training materials will be established specifically for Georgia operational needs relating to rebate operations. This rebate training will likely focus on navigation and on demand reporting since Georgia will not be performing the required rebate operations.

2.14 Attachments

Attachment A- Key Staff Job Descriptions

Attachment B- RxClaim Training Guide_Example