

How to Write a Job Aid

State of the Art

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Objectives

- ◆ Before we begin
 - How to minimize barriers to using job aids
 - How to train using a job aid
- ◆ How to decide the correct format
- ◆ How to write a job aid
- ◆ Writing guidelines
- ◆ How to create a decision table
- ◆ How to “sell” job aids (time permitting)

How to Minimize Barriers to Using Job Aids

- ◆ Common Barriers
 - Severe speed requirement
 - Hands occupied
 - Embarrassing
 - Prejudice against use
- ◆ Common minimizing techniques
 - Prompt-to-recall job aid
 - “Assistant” job aid
 - Hidden job aid

Your Turn

Minimize the Barrier

- Clinic assistants have not been getting complete histories and presenting symptoms resulting in a high incidence of delayed diagnosis, misdiagnosis, and medication errors
- They are young and eager to do a good job. They are inexperienced, feel pressured by the large queues, and are too self-conscious to use their laminated list of (many) questions in front of the patient
- Their workspace presents no significant barriers. They sit across from the patient at a desk with a glass top. There is a large wall immediately behind the patient. Notes are entered directly on to a lined “Initial Interview” sheet in the patient’s record.

How to Use Job Aids in Training

- ◆ Preview tasks to be “trained”
 - ◆ Tell purpose
 - ◆ Tell why important
- ◆ Teach sub-tasks to recall (if needed)
- ◆ Demonstrate using job aid
 - ◆ A few steps at a time (~ 30 seconds worth)
 - ◆ Tell when and why each step is done
 - ◆ Direct attention with questions to visible action
 - ◆ Allow trainee to try right after each demo. Give f/b
- ◆ Provide whole task practice simulation
 - ◆ Easy at first. Final practice done on-the-job

How to Select the Right Format

- ◆ If performance is sequential, use a cookbook, worksheet, or checklist
- ◆ If performance involves rule application, discrimination, decision-making, or problem solving (troubleshooting, diagnosis), use decision table or algorithm
- ◆ If both rules 1 & 2 apply, use combination of above

Your Turn Decide Format

- ◆ Determine whether to use the Malaria treatment job aid or the Measles treatment job aid
- ◆ Assemble the jet gun inoculator
- ◆ Select the appropriate crutch size
- ◆ Decide when Mother should return with her sick child
- ◆ Diagnose and prescribe treatment for patient

How to Write a Job Aid

- ◆ Put the name of the task at the top
- ◆ Write the purpose, when to start, and what materials are needed next
- ◆ Write the actions (steps). Consider:
 - ◆ Pictures
 - ◆ Two columns
 - ◆ Decision Tables
- ◆ Write the result and task standards

Guidelines for Writing Job Aids

- ◆ Use action verb plus object
- ◆ Highlight IMPORTANT information
- ◆ Tell what happens before/after each step
- ◆ Follow the “one-stop shopping” rule
- ◆ Follow the “look away” rule
- ◆ Put warnings BEFORE the step
- ◆ Consider worksheets or checklists

Practice

Review Patient File

Purpose: To verify accuracy

When: Do this at the end of each shift

Materials: Job aid, file, worksheet

Actions:

- Verify the address is complete.
- Review the meds administered today...
- ...
- Check your work: The result will be a complete and accurate file. Your work will be done as expected when...

Practice

Update Employee Benefits Form

The purpose is to update employee benefits. Do this at the end of each quarter. You'll need the employee file, and a blank benefits form. The first thing you should do is to write today's date in box 1. Once you have done that, write the employees' name in box 2. Then, write the benefits plan code number from the employee's file in box 3. Finally, write "OK" in pencil in the upper left hand corner of the form. The result will be an updated employee benefits form. The task is done as expected when you can do five per minute and there are no typo's or errors.

More Guidelines for Writing a Job Aid

- ◆ If pictures will make it easier to understand what to do, use callouts
- ◆ For complicated pictures, show the entire item and a linked close-up view
- ◆ Use two columns for:
 - Sub-steps (Allows two levels of users)
 - Examples
 - Notes

Practice

Actions:

- Start machine: [F8] [Home] [Shift] [7]
Screen will show ready
- Shut machine down: [2] [F9] [End]
Screen will show “STOP”

Our solution

Actions	Do this
1. Start machine	<ul style="list-style-type: none">◆ Press [F8]◆ Press [Home]◆ Press[Shift] + [7] NOTE: Screen will show ready
2. Shut machine down	<ul style="list-style-type: none">• Press [2]• Press [F9]• Press [End] NOTE: Screen will show “STOP”

Why Decision Tables?

Decide what employee wants to do. If he wants to change health insurance, use form HI-2. Use form HI-3 if he wants to discontinue health insurance. Use form RP-5 if he wants to discontinue retirement.

IF employee wants to	THEN complete form
Change health insurance	HI-2
Discontinue health insurance	HI-3
Discontinue retirement	RP-5

Guidelines for Writing Decision Tables




- ◆ “IF” on the left, “THEN” on the right
- ◆ Use “AND” for intermediate conditions
- ◆ Use arrow if NO intermediate condition exists for a particular instance
- ◆ Two or more IFs can lead to one THEN
- ◆ An IF should NEVER lead directly to two or more THENs

Practice

How to Code for Married Persons

Put a “2” in box 28 if you are filing separately. If you are the head of the household, put a “3” in box 28. But, if you have no exemptions, put a “4” in box 28. However, if you are single and wish you were not, put a “2” in box 28. If you are single and plan to stay that way, put a “6” in box 28.

Our solution

IF	AND	THEN write in box 28
Filing separately		2
Single	Wish you were NOT	
	Plan to stay single	6
Head of household		3
NO exemptions		4

How to “Sell” Job Aids - I

- ◆ Sell boss first!
- ◆ Always start from performance
 - Describe performance to be influenced
 - Capture cost of NOT improving performance
 - Determine if S/K is deficient
 - Determine if job aid is appropriate
 - Rule out other causes/solutions. If you cannot, include them

How to “Sell” Job Aids - II

- ◆ Appeal to each “buyer’s” vested interest
 - Performer
 - Supervisor
 - Manager
- ◆ Focus on benefits of using/value gained
- ◆ Keep client responsible for consequences of NOT using

For More Information

- ◆ Expert OJT Workshop
 - Expert OJT, Inc.
 - 757.873.9055
- ◆ Job Aid Workshop (JAWS)
 - Human Performance Technologies, LLP
 - 410.295.9700
- ◆ Tony Moore