



MatrixCare Training Scheduling Now Open

WHEN: Staff scheduling window: September 1, 2026 - September 30, 2026

WHERE: The change will affect the following venues:

- Acute/Inpatient
- Ambulatory

At the following NLH Member Organizations:

- **Home Care and Hospice**
 - Training sessions will be conducted in designated MatrixCare classroom locations across participating organizations and departments.

WHO: The change will affect the following staff at the above noted locations:

- All Clinical Staff
- Leaders
- Managers
- Supervisors
 - All staff who will be using MatrixCare as part of their role must be assigned to and attend the appropriate role-based training before go-live.

WHAT: The Health Informatics Education & Training team has published the MatrixCare Classroom Education Scheduling Workbook, which will serve as the organization's centralized tool for scheduling, managing, and tracking MatrixCare training activities.

The workbook is the single source of truth for training assignments, classroom capacity management, proctor coverage, and readiness tracking.

Leader Action Required

Leaders are responsible for reviewing training requirements and scheduling their staff into the appropriate sessions between September 1 **and** September 30.

Please complete the following:

1. Review all staff who require MatrixCare education.
2. Identify the appropriate role-based training for each employee.
3. Schedule staff into available classes using the workbook. Click [here](#)
4. Verify classroom seat availability before assigning staff.
5. Ensure each employee is able to attend their assigned session.
6. Monitor assigned staff and make schedule adjustments as needed.

WHY: Successful MatrixCare adoption depends on ensuring every end user receives the appropriate training before go-live.

Timely scheduling helps:

- Ensure all staff are trained and ready to safely use MatrixCare.
- Prevent classroom over-capacity and scheduling conflicts.
- Allow trainer and classroom resources to be utilized efficiently.
- Provide leadership visibility into overall organizational readiness.
- Minimize last-minute scheduling issues that could impact go-live success.

HOW: Scheduling Staff in the Workbook

Each training day contains a dedicated worksheet tab that includes:

- Training role
- Classroom location
- Room assignment
- Trainer assignment
- Class time
- Seat capacity
- Proctor assignment
- Staff assignment fields

To schedule an employee:

1. Navigate to the desired training date tab.
2. Locate the training session that matches the employee's role.
3. Enter the employee's name in an available Staff field.
4. Confirm seats remain available.
5. Verify the employee can attend the selected session.

Schedule Changes

If an employee needs to move to another session:

1. Remove the employee from the original class.
2. Add the employee to a new session with available capacity.
3. Verify the employee remains scheduled for the appropriate role-based training.

Proctor Assignments

- Each classroom includes a designated Proctor field.
- Leaders are responsible for identifying and assigning a proctor for each classroom location and updating the workbook once coverage has been confirmed.

Training Compliance & Readiness Tracking

➤ Role Demand Tab

The Role Demand tab automatically tracks:

- Total learners requiring training
- Number of learners currently scheduled
- Learners remaining to be scheduled
- Potential over-scheduling concerns

Totals update automatically as staff assignments are entered.

➤ All Dates Summary Tab

The All Dates Summary provides a consolidated organizational view of:

- Scheduled classes
- Assigned trainers
- Classroom locations
- Seat utilization
- Proctor assignments
- Staff scheduling activity

Leaders should review this tab regularly to ensure all required learners have been assigned.

Important: All staff requiring MatrixCare access must be scheduled into the appropriate role-based training session prior to go-live. Early scheduling is strongly encouraged to maximize classroom availability and training readiness.

NOTE: Questions regarding training scheduling, workbook access, or MatrixCare education requirements should be directed to Nicole Burke, Lisa Travis, your manager, Jen Jackson, Pam Fox, Jamie Fournier, Heather Kelley, Jordyn Barnes, or Nikki Gray.

****PLEASE NOTE: This mailbox is not monitored.****