



# VA LMS Migration Executive Decision Memorandum

Toolkit Item Reference K

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## **What This Is:**

This document reflects a final decision made by the VA LMS Executive Steering Committee members in February 2008 and describes the plan to not migrate legacy system training information to the VA LMS. Specifically, the EDM states:

- ❖ No local training history will be imported into VA LMS. Legacy system data will be archived and maintained for the required timeframe in accordance with VA's records management schedule requirements for training information and accrediting body requirements.
- ❖ Local LMS Administrators will manually create LMS catalog entries for courses that will be offered in FY09 or beyond.

## **Why It's Useful:**

This document is provided to ensure your team has sufficient information—to include historical records, references, diagrams, etc.—to adequately understand and prepare for Phase II implementation.

## **How To Use It:**

Use this document as an historical reference.

**LMS EXECUTIVE STEERING COMMITTEE DECISION DOCUMENT**

**Date:** February 15, 2008  
**To:** VA LMS Executive Steering Committee  
**From:** Melinda Griffin  
**Thru:**  
**Subject:** Item Migration and Training History Migration  
**Prepared By:** Melinda Griffin  
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**Action Requested:** \_\_\_\_\_ Request for approval  
 (please check one)  Request for discussion or further review  
 \_\_\_\_\_ For your Information  
 \_\_\_\_\_ Other (please specify)

**STATEMENT OF ISSUE:**

**Issue:** Determine the degree to which VA LMS will use automated database migration tools to support legacy training tracking systems and locally created learning offerings for (a) Item Migration and/or (b) Training History Migration.

**Background:** The VA LMS Team was charged with providing an EDM that outlines necessary actions to achieve full LMS national and local implementation by October 1, 2008. The primary goal of this approach is to achieve a single training record for FY09. This requires all national and locally developed and maintained learning offerings to be listed in the LMS catalog and tested by September 2008.

**RECOMMENDATION of REQUESTOR:**

Option #3. Limit creation of LMS catalog items for locally produced learning offerings to those intended for use in FY09 or beyond. Provide (1) database import tools created by the LMS Core Team and (2) limit the import of historical training data from legacy systems to FY07 completions of those VA national mandatory training courses that have a 2-year retraining interval (No FEAR and Prevention of Sexual Harassment), and other nationally determined mission critical courses.

**APPROVE/DISAPPROVE:**

1. No local training history will be imported into VA LMS. Legacy system data will be archived and maintained for the required timeframe in accordance with VA's records management schedule requirements for training information and accrediting body requirements.
2. Local LMS Administrators will manually create LMS catalog entries for courses that will be offered in FY09 or beyond.

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 Joy W. Hunter  
 Chair, LMS Executive Steering Committee

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 2/15/2008  
 Date

**I. STATEMENT OF ISSUE:**

Determine the degree to which VA LMS will use automated database management tools to support legacy training tracking systems and locally created learning offerings for (a) Item Migration and/or (b) Training History Migration.

**II. SUMMARY OF FACTS/BACKGROUND:**

- VA LMS is being implemented in two phases, National Infrastructure and Local Infrastructure.
- National Infrastructure was released on October 1, 2007, with a focus on the four VA national mandatory courses. Other national learning offerings are available and continue to be added.
- Local Infrastructure implementation replaces legacy training tracking systems, and therefore requires that locally created learning offerings be listed and maintained as catalog items in VA LMS. This is workload intensive and requires a minimum of 24 training hours for the designated local LMS administrators to be prepared for this long-term management responsibility.
- When both the National and Local Infrastructure are in place the two mission statements for the LMS—specifically, provide a single portal to all learning offerings, and provide a single training record for all VA employees—will be complete.
- To ensure a full fiscal year of training tracking reported in a single system, all national and locally developed and maintained learning offerings must be listed in the LMS catalog and tested by September 2008.

**III. SYNOPSIS OF SIGNIFICANT RELATED ISSUES:**

- Individuals are responsible for maintaining a record of their training.
- Training information managed in a system of records must be maintained for 5 years under VA's records management schedule.
- Historical training records are needed to meet audit requirements and document that employees have met the training requirements associated with certifications, licenses, and accrediting body requirements.
- There are three options for maintaining legacy system historical training data, if this information is not migrated to VA LMS:
  - Legacy facility-based training tracking systems (e.g., VHA TEMPO, SynQuest, OI Tracker, CAMEO, Content Delivery Network) are left in place for FY 08 and prior years to provide reporting capability for accreditation and auditing requirements.
  - The existing EES education data repository is updated to include development of a graphical user interface and reporting tools similar to those in the legacy facility-based systems, to serve as an archive for FY08 and prior year training history.
  - Printed transcripts for FY08 and prior years are used for VA and related audits, such as joint commission and clinical accrediting bodies.

**IV. CRITERIA FOR DECISION-MAKING:**

Catalog Entries for Learning Offerings

- Workload for LMS Administrators to create LMS catalog entries.
- Cost and workload to create automated database migration tools.
- Cost and workload to implement and train legacy system administrators to use automated database migration tools.

#### Historical Training Data

- Frequency of requests for historical training data.
- Time and cost of archiving and retrieving historical training data from non-VA LMS systems.
- Workload associated with dual reporting.

### V. CLIENT/CUSTOMER/STAKEHOLDER INVOLVEMENT:

Many stakeholders regard the seamless transition of training history into VA LMS as the ideal state. However, this entails certain trade-offs. Among the critical trade-offs are the time required to migrate training history data on a site-by-site basis, the workload for local staff, effort dedicated to historical rather than forward facing tracking, and the deflection of the limited resources of the LMS Core Team from new capability in favor of migrating the historical training records. This is primarily (though not exclusively) a VHA issue, but also impacts NCA and OI&T as their historical training records are commingled with VHA records.

The options provided in this document reflect lessons learned from the prototype sites, and prior discussions with the administration LMS representatives and major providers of VA national courses. Lessons learned from the data mapping and full training history import approach used in the prototype are informative. Best estimates are that full mapping and import of all existing catalog entries (approximately 2500 courses) and training history for a prototype medical center required ~600 labor hours. Another prototype site with fewer courses (about 650), but more complex courseware integration required ~400 hours.

### VI. OPTIONS AND RATIONALE:

**Option 1: Local LMS administrators manually create all local catalog items in the LMS. LMS Core Team assists local administrators in mapping current and prior year training histories to the newly created items, and import training history using database migration tools.**

#### Rationale Pro:

- Meets desire of many stakeholders to completely transition all available records, and thus reporting, to VA LMS.
- Eliminates dual reporting from a legacy or archive system once the transition of training history is complete.
- Supports national roll up of data from FY08 and prior years.

#### Rationale Con:

- Workload intensive.
- Requires local database expertise.
- Local LMS administrators must be trained in the functions of the LMS Item Manager role before creating manual entries in LMS.
- Requires manual entry of all learning offerings, including hundreds of courses no longer in use, as a necessary condition for importing complete historical training data.
- Requires local administrators to map historical training data to their manual LMS item entries.
- Requires significant LMS Core Team support to create data migration tools to import learning histories, and train local administrators in their use.
- Frequency of audit requests or individual employee requests unknown. Anecdotal feedback indicates infrequent.
- At a rate of 3 major sites per week, migration of all legacy systems would require ~18 months under this option. Full fiscal year reporting of both national and local training would not occur before FY10.

- Increased contractual costs for added LMS records maintenance.

**Option 2: LMS Core Team provides spreadsheet-style templates to facilitate extracting required data fields necessary for LMS catalog item and course (“content object”) creation from legacy systems. LMS Core Team trains local LMS administrators in the use of these templates. Local LMS administrators extract data from legacy systems for all current and past courses, and map current and prior year training history. LMS Core Team imports catalog item data, course data and training histories using database tools. Local LMS administrators manually validate and edit imported item entries and course data.**

**Rationale Pro:**

- Reduces local LMS administrator workload in comparison to Option #1.
- Eliminates dual reporting from a legacy or archive system once the transition of training history is complete.
- Supports national roll up of data from FY08 and prior years.
- Full fiscal year reporting is achieved for FY09.

**Rationale Con:**

- Workload intensive.
- Requires local database expertise.
- Requires manual validation and editing of LMS catalog information for learning offerings.
- Local LMS administrators must be trained in the functions of the LMS Item Manager role before validating and editing the imported catalog item and course entries.
- Requires full migration of local learning offering catalog entries as a necessary condition for importing complete historical training data.
- Requires significant LMS Core Team support to create data migration tools to import learning histories, and train local administrators in their use.
- Requires local administrators to map historical training data to the item entries identified for import.
- Frequency of audit requests or individual employee requests unknown. Anecdotal feedback indicates infrequent.
- Schedule required for history migration is ~one year, thus full fiscal year reporting of both national and local training would not occur before FY10.
- Increased contractual costs for added LMS records maintenance.

**Option 3: LMS Core Team provides spreadsheet-style templates to facilitate extracting required data fields necessary for LMS item creation. LMS Core Team trains local LMS administrators in the use of these templates. Local LMS administrators map only those local items that will be used in FY09 or beyond. Limit the import of historical training data from legacy systems to FY07 completions of those VA national mandatory training courses that have a 2-year retraining interval (No FEAR and Prevention of Sexual Harassment) and other nationally determined mission critical courses, using simple spreadsheets with minimal data (employee SSNs and completion dates).**

**Rationale Pro:**

- Reduces local LMS administrator workload in comparison to Options #1 and #2.
- Full fiscal year reporting is achieved for FY09.
- Allows LMS Core Team to focus on new functionality in FY09, since migration is not longer a resource requirement.
- Focuses local and LMS Core Team resources on forward-looking LMS implementation.

**Rationale Con:**

- Requires local database expertise.

- Local LMS administrators must be trained in the functions of the LMS Item Manager role before validating and editing the imported catalog item entries.
- Dual reporting required for FY08.
- Legacy system reports required for prior years.
- Frequency of audit requests or individual employee requests unknown. Anecdotal feedback indicates infrequent.
- Requires maintenance of legacy systems data for 5 years in accordance with VA’s records management schedule requirements for training information.

**Option 4: Local LMS Administrators manually create LMS catalog entries for only those courses that will be offered in FY09 or beyond. No local training history is imported into VA LMS.**

**Rational Pro:**

- LMS Core Team effort is not required.
- Local database expertise is not required.
- Full fiscal year reporting is achieved for FY09.
- Focuses local and LMS Core Team resources on forward-looking LMS implementation.

**Rational Con:**

- Local LMS administrators must be trained in the functions of the LMS Item Manager role before creating manual entries in LMS.
- Requires more local LMS administrator workload than Option #3, as local LMS administrators must manually enter both basic catalog item and course (“content object”) information, and manually connect catalog items with course data.
- Dual reporting required for FY08.
- Dual reporting required at the national level for No FEAR and Prevention of Sexual Harassment training for the current reporting period (requires FY07 and FY08 data).
- Legacy system reports required for prior years.
- Frequency of audit requests or individual employee requests unknown. Anecdotal feedback indicates infrequent.
- Requires maintenance of legacy system data for 5 years in accordance with VA’s records management schedule requirements for training information.

<b>VII. RECOMMENDED OPTION:</b>
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To achieve full fiscal year reporting beginning in FY09, while minimizing local LMS administrator workload, Option #3 is recommended. This option call for limiting the creation of LMS catalog items for locally produced learning offerings to those intended for use in FY09 or beyond. The LMS Core Team will provide spreadsheet-style templates to be used by local LMS administrators to map available catalog item and course (“content object”) information. The import of historical training data from legacy systems will be limited to FY07 completions of those VA national mandatory training courses that have a 2-year retraining interval (No FEAR and Prevention of Sexual Harassment), and other nationally determined mission critical courses.

**VIII. DISSENTING OPINIONS REGARDING RECOMMENDED OPTION:**

The primary dissenting opinion comes from VHA TEMPO coordinators. They are concerned that:

- Dual reports will not be acceptable to VAMC facility and VISN directors.
- Determining compliance with VHA performance measures will be difficult when compliance data must be obtained from two systems. (Note: While many of these performance measures are no longer national requirements, we are informed that many VAMC facility and VISN directors treat these measures as ongoing administration requirements.)
- Accrediting bodies and auditors will not accept legacy system and dual reports.

The VHA TEMPO coordinators have anticipated that the legacy system and dual reporting concerns would be resolved by the creation of VA LMS catalog entries for all current and past local learning offerings (as was supported in the prototype), and the import of all available historical training data.

**IX. EFFECT OF RECOMMENDED OPTION ON EXISTING POLICY/NATIONAL TRAINING PROGRAMS:**

Accepting the recommended option may include discussions with and require the support of the National Leadership Board subcommittees. VA decision makers who depend on timely historical training data may be negatively impacted by dual reporting for FY08 and prior years. Conversely, the recommended option enables these decision makers to rely on a single source for current training information beginning in FY09.

**X. LEGAL OR LEGISLATIVE CONSIDERATIONS OF THE RECOMMENDED OPTION:**

No known impact.

**XI. BUDGET/FINANCIAL OR IT CONSIDERATIONS OF THE RECOMMENDED OPTION:**

- Costs associated with creating templates (work done by the LMS Core Team) are more than offset by the cost avoidance inherent in reducing the workload of local LMS administrators.
- Costs associated with maintaining legacy system data through October 1, 2014, depend on the option selected (see III. SYNOPSIS OF SIGNIFICANT RELATED ISSUES).
  - Maintaining a current legacy system is estimated at ~\$35k per site and the recommended option should not exceed that figure.
  - The cost of OPM hosting for legacy system data migrated to VA LMS has to date been higher than similar hosting provided by AAC or other VA national data.
  - If legacy training history data are stored in the VA Education Data Repository, a report generation interface must be developed at an estimated cost of ~\$350k.

**XII. STAFF, UNION OR PUBLIC RELATIONS CONSIDERATIONS OF THE RECOMMENDED OPTION:**

No known issues.

**XIV. IMPLEMENTATION:**

The recommended option achieves full fiscal year reporting beginning in FY09, while minimizing local LMS administrator workload. The planning and implementation, including training, falls largely to the LMS Core Team. Training options are specifically discussed in a separate executive decision memo.