Excel Clinical Specialization (VILT) Facilitator's Guide:

Platform: Microsoft Teams
Audience: Clinical Staff
Class Size: 10–15
Duration: 60 Minutes

This guide demonstrates learner-centered virtual facilitation, adult learning theory in action, and performance-based assessment without an LMS.

Instructional Design Rationale

This virtual Excel session is designed for adult learners with varied confidence levels. Instruction prioritizes **relevance**, **psychological safety**, and **observable skill transfer**.

• Realistic, job-aligned clinical spreadsheets

• Demonstration → guided practice → independent application

• Continuous, low-stakes learning checks

• Pacing that favors confidence over speed

1. Pre-Class Preparation

• Launch Microsoft Teams early; test audio and screen sharing

• Open welcome slide, Excel exercise file, and orientation video

2. Welcome & Session Framing

"Today we'll work hands-on with realistic spreadsheets similar to those you receive from managed care organizations (MCOs). Everything we practice is designed to make your daily Excel work faster and more accurate."

Learning Evidence: Learners confirm access to the exercise file via chat or reaction.

3. Prior Knowledge Activation – Tab 1

• AutoSave, Save, Undo/Redo

• Ribbon, Formula Bar, Rows, Columns, Tabs, Zoom

Stop & Show: Learners set Zoom to 120% and type “Ready” in chat.

4. Orientation Video – Switching Screens

Purpose: Reduce split-attention anxiety and support learner autonomy.

5. Skill Demonstration – Data Cleanup (Tab 2)

• Numbers stored as text and alignment issues

• Sorting, multi-level sorting, filtering

• Conditional formatting

Stop & Show: Learners correct one issue and post ✔ Done in chat.

6. Guided Practice – Learner Challenges (Tab 3)

• Frank Fisher – number of members

• Janice Hill – most recent assessment date

• Grace Green – highlight March assessments

• Mia Morgan – upcoming assessments and cities

Learning Evidence: Chat responses, completed files, and learner screen sharing.

7. Data Management – Tables

Stop & Show: Learners convert range to a table and react with 🎯.

8. Formulas for Scheduling – Tab 4

• EDATE()

• WORKDAY()

• Fill-down techniques

Learning Evidence: Learners paste one formula into chat.

9. Power Tools (If Time Allows)

Text-to-Columns, Find & Replace, Go-To Special.

10. Wrap-Up & Reflection

• Learners save completed Excel file

• Facilitator shares follow-up resources and evaluation link

Reflection Prompt: What Excel task will you handle differently after today?

Instructor Reflection

After delivery, the facilitator reflects on learner confidence, pacing, and observable transfer to job tasks.