

# Fiduciary FY15 NTC Class Assignment Job Aid

Section I of this job aid provides Training Managers and VBA TMS Administrators with instructions for adding and/or removing employees to, the FY15 Fiduciary Service classes in TMS. Section II lists the proper actions to take when employees change job positions.

## Section I: Add or Remove employees in a Primary Class within TMS

1. Select **Learning** from the TMS Admin home screen
2. Select **Classes** from the left-hand menu
3. Input the desired Class ID in the **Class ID** field and select **Search**
  - a. **VBA-299** – Trainee Field Examiner
  - b. **VBA-300** – Trainee Legal Instrument Examiner
  - c. **VBA-301** – Trainee Fiduciary Service Representative
  - d. **VBA-302** – Field Examiner
  - e. **VBA-303** – Legal Instrument Examiner
  - f. **VBA-304** – Fiduciary Service Representative
4. Once the initial class record appears in the search results, select the **Edit** icon

The screenshot displays the TMS Admin interface. At the top, there is a navigation bar with tabs for Home, Admin, and Learning. The Learning tab is selected. Below the navigation bar, there is a search bar with the text "Enter Keywords or Command" and a "Go" button. The main content area is titled "Classes" and contains a search form. The search form has several fields: "Case sensitive search" (radio buttons for Yes and No), "Class ID" (a dropdown menu set to "Starts With" and a text input field containing "vba-299"), "Description" (a dropdown menu set to "Starts With" and a text input field), "Domains" (a dropdown menu set to "Starts With" and a text input field), "User ID" (a dropdown menu set to "Starts With" and a text input field), and "Curricula" (a dropdown menu set to "Starts With" and a text input field). There are "Search", "Save As", and "Reset" buttons. Below the search form, there is a "Field Chooser" and a "Download Search Results" link. The search results table has two columns: "Class ID" and "Description". The first row in the table is "VBA-299" and "Fiduciary NTC FY15 FE Trainee Class".

# Fiduciary FY15 NTC Class Assignment Job Aid

5. Within the main class record, select **Users** from the left-hand menu.
6. To add an employee to the class, input the employee's TMS User ID and select **Add**. To add multiple employees, select **add one or more from list**.
7. To remove an employee from the class, mark the **Remove** check box next to the employee's TMS User ID and select **Apply Changes**

The screenshot displays the 'Edit the Class' interface. On the left-hand menu, the 'Users' option is highlighted with a red box and a circled '5.'. The main content area is divided into two sections: 'Add a User to the Class' and 'Update the Users for the Class'. In the 'Add a User to the Class' section, there is a 'User ID' input field with an orange box around it and a circled '6.', and an 'Add' button. In the 'Update the Users for the Class' section, there is an 'Apply Changes' button with a green box around it and a circled '7.', and a 'Reset' button. Below these sections is a table of users with columns for 'User ID', 'Name', 'Status', and 'Remove'. The 'Remove' column contains checkboxes for each user. The table also includes pagination controls and a 'Go' button.

User ID	Name	Status			Remove
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a>	<a href="#">Comments</a>	<input type="checkbox"/>

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### Section 2: Class Change Scenarios

- **Scenario 1:** *An LIE employee becomes a FE.* In this situation, the local TMS Admin will need to remove the employee from the Experienced LIE class (VBA-303), and add them to the FE Trainee class (VBA-299). The appropriate FE curricula will be centrally assigned to the employee.
- **Scenario 2:** *An LIE, FE, or FSR moves into a supervisory position and is no longer a production employee.* This situation requires the local TMS Admin to remove the employee from the appropriate curriculum as non-production employees are not part of the target audience for the Fiduciary Service NTC. The Admin should ensure the appropriate supervisory curricula, such as the 'New Supervisors Soft Skills Training' curriculum, are added to the employee's learning plan.
- **Scenario 3:** *A Fiduciary Service employee accepts a VBA position outside of Fiduciary Service.* In this circumstance, the employee should be removed from all Fiduciary Service classes. The employee's new required training curricula should be added by the Training Manager.

**For questions regarding this job aid, please contact the VBA Curriculum Support Team at [VBACurriculumSupport@Camber.com](mailto:VBACurriculumSupport@Camber.com). For policy-related questions, contact the Compensation Service Training Staff at [VAVBAWAS/CO/FIDUCIARYTRAINING](mailto:VAVBAWAS/CO/FIDUCIARYTRAINING).**