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
- Select Classes from the left-hand menu
- 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

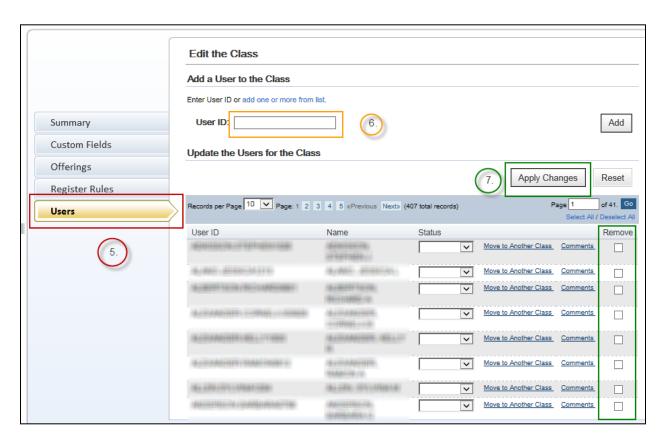
Learning Search: Enter Keywords or Command Go ▶ | Search | Add New | @ Classes Scheduled Offerings Search > Search Results Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search Group Instances Case sensitive search: O Yes

No Catalogs Class ID: Starts With ∨ vba-299 Curricula Description: Starts With Requirements Domains: Starts With ~ Questionnaire Surveys User ID: Starts With ~ Curricula Starts With ~ Accreditation Instructors Add/Remove Criteria 😌 Tasks Search Save As Tools Field Chooser 😜 Download Search Results X Class ID A Description Fiduciary NTC FY15 FE Trainee Class VBA-299

4. Once the initial class record appears in the search results, select the **Edit** icon

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**



Fiduciary FY15 NTC Class Assignment Job Aid

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. For policy-related questions, contact the Compensation Service Training Staff at VAVBAWAS/CO/FIDUCIARYTRAINING.