

## Fiduciary FY16 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 FY16 Fiduciary Program classes in TMS. Section II lists the proper actions to take when employees change job positions.

\* In order to edit Pension and Fiduciary Service's classes, TMS Admins must obtain OMGT domain access by contacting the VBA Domain Manager at [Arthur.Edmonds@va.gov](mailto:Arthur.Edmonds@va.gov)

### 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

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The screenshot shows the LMS interface with the following elements:

- Navigation Menu:** Home, Users, Performance, **Learning** (highlighted with a red box), Content, Commerce, System Admin.
- Search Bar:** Search: Enter Keywords or Command (1) Go ▶
- Left-hand Menu:** Items, Scheduled Offerings, **Classes** (2), Group Instances, Catalogs, Curricula, Requirements, Questionnaire Surveys, Instructors, Tasks, Accreditation, Tools.
- Search Results:**
  - Classes** | Search | Add New | [icon]
  - Search > Search Results Saved Searches [icon]
  - 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.
  - Case sensitive search:**  Yes  No
  - Class ID:** Starts With [dropdown] VBA-299 (3)
  - Description:** Starts With [dropdown] [input]
  - Domains:** Starts With [dropdown] [input] [dropdown]
  - User ID:** Starts With [dropdown] [input] [dropdown]
  - Curricula:** Starts With [dropdown] [input] [dropdown]
  - Add/Remove Criteria** [icon]
  - Buttons: Search, Save As, Reset
  - Field Chooser** [icon] **Download Search Results** [icon]
- Search Results Table:**

Class ID ▲	Description
VBA-299	Fiduciary NTC Trainee FE Class

(4)

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**

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**Edit the Class**

**Add a User to the Class**

Enter User ID or [add one or more from list](#).

User ID:  **6.**

**Update the Users for the Class**

**7.**

Records per Page: 10 Page: 1 2 3 4 5 «Previous Next» (407 total records) Page 1 of 41.  [Select All / Deselect All](#)

User ID	Name	Status		Remove
XXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a> <a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a> <a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a> <a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a> <a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a> <a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXXX	<input type="text"/>	<a href="#">Move to Another Class</a> <a href="#">Comments</a>	<input type="checkbox"/>
XXXXXXXXXXXXXXXXXX	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 Program 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 Program employee accepts a VBA position outside of the Fiduciary Program.* In this circumstance, the employee should be removed from all Fiduciary Program 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 Fiduciary Training Staff at [VAVBAWAS/CO/F&FE](mailto:VAVBAWAS/CO/F&FE).