

## Creating Pension and Fiduciary Service PMC NTC Quarterly Training Reports for FY16

A Job Aid for Training Managers (TMs) – Revision Date: 11/3/2015

Pension and Fiduciary Service requires all VBA Regional Offices to submit quarterly training reports to demonstrate reasonable progress toward the annual PMC National Training Curriculum (NTC) requirements.

TMs will submit the reports to [PENSIONTRNG&QUAL.VBACO@va.gov](mailto:PENSIONTRNG&QUAL.VBACO@va.gov) the third workday after the end of each quarter. FY16 report due dates are as follows:

- January 6, 2015
- April 5, 2015
- July 6, 2015
- October 5, 2015

This job aid instructs TMs on gathering the necessary data in the TMS and converting it to the required format. Although the quarterly reports are required, TMs may run the reports on-demand throughout the fiscal year to check their employees' progress.

**Quick Tip:** Before you begin, be sure you have assigned **each employee** you are tracking to only **one primary class**, based on the employee's job position. Assign PMC VSRs to class VBA-293 and PMC RVSRs/DROs to class VBA-294.

**Part 1:** Run the **Custom User Item Status (CSV)** report in TMS using the following parameters:

1. Unmark the **Mask User IDs** box.
2. Select the filter icon next to the **User** field.
3. Within the **Users Filter** pop-up:
  - a. Enter your Station ID into the **Domains** field.
  - b. Enter the primary PMC NTC Class ID in the **Classes** field:
    - **VBA-293** for PMC VSRs
    - **VBA-294** for PMC RVSR/DROs

Run Custom User Item Status (CSV)

Report Destination: Local File

Report Format: CSV

Mask User IDs

Case sensitive search:  Yes  No

User: Exact

User ID: Starts With

User Status:  Active  Not Active  Both

Email Address: Starts With

Domains: Starts With 310

Curricula: Starts With

Classes: Starts With VBA-293

Add/Remove Criteria

Search Submit Criteria

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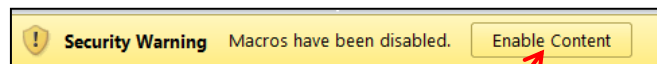
- c. Select **Submit Criteria**.
4. Leave the **Item** and **Completion Status** fields blank.
5. Enter **10/01/2015** in the **Completed Date From** field.
6. Leave the **Completed Date To** field blank OR select a specific date if the preferred date is in the past.
7. Select **Schedule Job**.

The screenshot shows a web form with the following fields and values:

- Item:** [Exact] [Type: ] [ID: ]
- Completion Status:** [Exact] [ ]
- Completed Date From:** (MM/DD/YYYY) [10/01/2015] (highlighted in red)
- Completed Date To:** (MM/DD/YYYY) [ ]
- Schedule Job** button

**Part 2:** The Pension NTC FY16 Progress Report Excel Workbooks can be found on the [TM Resources](#) page of the Training Managers Resource Center (TMRC) website.

- [PMC VSR Progress Report Shell](#)
  - [PMC RVSR Progress Report Shell](#)
1. Save the Excel file in **.xls (Excel 97-2003)** format as **Pension\_VSR\_Shell\_FY16** or **Pension\_RVSR\_Shell\_FY16** (the macros will not function if saved under a different name).
  2. Select **Enable Content** to activate Macros.



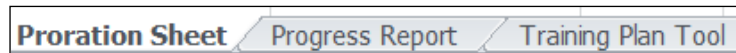
3. When you receive the Custom User Item Status report from TMS, open the file and place your cursor in the box highlighted in **red** below. Press **Ctrl+C** to copy the entire worksheet.

	A	B	C	D	E	F	G	H	I
1	Item ID	Item Type	Revision I	Revision M	Item Desc	Learning F	Schedulec	Completi	Completi
2	10176	VA			VA Privac	1		VA - COMI	Complete
3	10203	VA			Privacy an	1		VA - COMI	Complete
4	1372648	VA			BA Conti	0.5		VA - COMI	Complete
5	1379370	VA			SR - Deat	5		VA - COMI	Complete
6	1379374	VA	4/12/2011		1 VSR - Dep	15.25		VA - COMI	Complete
7	1379376	VA	4/12/2011		1 VSR - Accr	19		VA - COMI	Complete
8	3812493	VA	6/13/2013		1 Annual Gc	1		VA - COMI	Complete
9	3847680	VA	6/6/2013		1 Safeguard	1		VA - COMI	Complete
10	3849242	VA	6/19/2013		1 VBA Orgar	1		VA - COMI	Complete
11	3877246	VA	4/30/2014		1 Sensitivity	0.5		VA - COMI	Complete
12	5508	VA	9/24/2007		1 VA Online	1		VA - COMI	Complete
13	610924	VA	10/1/2011		2 Claims Re	2		VA - COMI	Complete
14	70739	VA	3/21/2008		1 SHARE Tra	0.5		VA - COMI	Complete
15	10176	VA	2/8/2007		6 VA Privac	1		VA - COMI	Complete
16	10203	VA	2/14/2007		5 Privacy an	1		VA - COMI	Complete
17	1197929	VA	10/1/2011		2 Due Proce	2		VA - COMI	Complete
18	1197931	VA	10/1/2011		2 Duty to As	3.75		VA - COMI	Complete
19	1197933	VA	10/1/2011		2 Effective I	1.5		VA - COMI	Complete
20	1197950	VA	10/28/200		1 CP/VSR In	3		VA - COMI	Complete

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4. Returning to the Shell, place your cursor in cell **A1** of the spreadsheet. Press **Ctrl+V** to paste in the Item Status data. Allow the program a few seconds to respond.
5. The shell now displays the following worksheets:



- **Proration Sheet** – allows TMs to adjust how the program tracks progress for employees who are on approved leaves of absence or leaving trainee status during FY16. Select the number of months the employee is responsible for training during FY16, and the program will track the progress accordingly.

Pension RVSR Proration				
User ID	Months in Position	Certification Status	Mandatory Hour Requirement	Station-Determined Hour Requirement
	12	Uncertified	40	40
	5	Uncertified	40	40
	6	Uncertified	40	40
	7	Uncertified	40	40
	8	Uncertified	40	40
	9	Uncertified	40	40
	10	Uncertified	40	40
	11	Uncertified	40	40
	12	Uncertified	40	40
	12	Uncertified	40	40

- **Certification Status** – allows TMs to select whether or not an individual employee has successfully passed their respective Skills Certification test. By default all employees are marked as Uncertified unless otherwise specified. If an employee has passed the test, select Certified, and the workbook will adjust the Mandatory and Station-Determined Hour Requirements accordingly (refer to the Pension NTC SOP).

Pension RVSR Proration				
User ID	Months in Position	Certification Status	Mandatory Hour Requirement	Station-Determined Hour Requirement
	12	Uncertified	40	40
	12	Certified	40	40
	12	Uncertified	40	40
	12	Uncertified	40	40

- **Progress Report** – displays individual employee's progress within each sub-curriculum (Mandatory and Station-Determined) and toward the NTC as a whole. This sheet also helps TMs track averages and completion percentages



## **Creating Pension and Fiduciary Service PMC NTC Quarterly Training Reports for FY16**

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**Part 3:** Submit your reports.

Before submitting your reports to Pension and Fiduciary Service, please save them according to the following naming conventions:

**<Station name>\_Q<Quarter #>\_NTC\_Progress\_Pension\_<JobPosition>**

For example, the first quarterly VSR report for the Philadelphia Regional Office would be saved as:

**Philadelphia\_Q1\_NTC\_Progress\_Pension\_VSR**

Note: It is recommended that you save each completed shell in a compressed (zipped) folder. This will significantly reduce the size of the file for emailing purposes.

Submit your completed Pension VSR and RVSR Shell spreadsheets to:

[PENSIONTRNG&QUAL.VBACO@va.gov](mailto:PENSIONTRNG&QUAL.VBACO@va.gov). For questions regarding this job aid, please contact [VBACurriculumSupport@Camber.com](mailto:VBACurriculumSupport@Camber.com).