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 <u>PENSIONTRNG&QUAL.VBACO@va.gov</u> the third workday after the end of each quarter. FY16 report due dates are as follows:

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



User ID:	Starts With	
User Status:	Active O Not Active O Both	
Email Address:	Starts With	
Domains:	Starts With	Y
Curricula:	Starts With	T
Classes:	Starts With VBA-293]▼
Add/Remove Criteria 🕏		Search Subric riteria

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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.
- Leave the Completed Date To field blank OR select a specific date if the preferred date is in the past.
- 7. Select Schedule Job.

Item:	Exact V Type:	
	ID:	¥
Completion Status:	Exact	Y
Completed Date From: (MM/DD/YYYY)	10/01/2015	
Completed Date To: (MM/DD/YYYY)	///	
		Scheduk

Part 2: The Pension NTC FY16 Progress Report Excel Workbooks can be found on the <u>TM Resources</u> page of the Training Managers Resource Center (TMRC) website.

- PMC VSR Progress Report Shell
- PMC RVSR Progress Report Shell
- 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		В	С	D		E	F	G	Н	1
1	Item ID	Iter	m Type	Revision [Revision N	Ite	em Desc	Learning H	Scheduled	Completic	Completio
2	10176	VA		- /- /		- 1	A Privacy	1		VA - COM	Complete
3	10203	VA	Selec	t and pre	ss Ctrl C	r	rivacy an	1		VA - COM	Complete
4	1372648	VA	to c	opy entire	report	E	BA Conti	0.5		VA - COM	Complete
5	1379370	VA				3	SR - Deat	5		VA - COM	Complete
6	1379374	VA		4/12/2011	1	VS	SR - Dep	15.25		VA - COM	Complete
7	1379376	VA		4/12/2011	1	VS	SR - Accr	19		VA - COM	Complete
8	3812493	VA		6/13/2013	1	Ar	nnual Gc	1		VA - COM	Complete
9	3847680	VA		6/6/2013 (1	Sa	afeguard	1		VA - COM	Complete
10	3849242	VA		6/19/2013	1	V	BA Orgai	1		VA - COM	Complete
11	3877246	VA		4/30/2014	1	Se	ensitivity	0.5		VA - COM	Complete
12	5508	VA		9/24/2007	1	V	A Online	1		VA - COM	Complete
13	610924	VA		10/1/2011	2	CI	aims Re	2		VA - COM	Complete
14	70739	VA		3/21/2008	1	SF	HARE Tra	0.5		VA - COM	Complete
15	10176	VA		2/8/2007 1	6	V	A Privacy	1		VA - COM	Complete
16	10203	VA		2/14/2007	5	Pr	rivacy an	1		VA - COM	Complete
17	1197929	VA		10/1/2011	2	Du	ue Proce	2		VA - COM	Complete
18	1197931	VA		10/1/2011	2	Du	uty to As	3.75		VA - COM	Complete
19	1197933	VA		10/1/2011	2	Ef	fective I	1.5		VA - COM	Complete
20	1197950	VA		10/28/200	1	CF	P/VSR In	3		VA - COM	Complete

- 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 Progress Report Training Plan Tool

• **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 Pro	oration					
User ID	User ID Months in Position		Certification Status Mandatory Hour Requirement		Station-Determined Hour	
					Requirement	
18.106/0011/0223401/025333	12	-	Uncertified	40	40	
A CREAT TRADE (NOT TRANSPORT	5	•	Uncertified	40	40	
ACCORDENCES IN A SCHOOL SECTION OF THE SECTION OF T	7		Uncertified	40	40	
ANIMAL MARKAN	8		Uncertified	40	40	
of TRAINING CRAMINES ENDING	10	=	Uncertified	40	40	
	11	+	Uncertified	40	40	
THREE MARKINGS	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	м	andatory Hour Requirement	Station-Determined Hour	
					Requirement	
16.108001102201010233	12	Uncertified	-	40	40	
A CREW TROOP IN CONTRACTOR	12	Certified		40	40	
ALTERATION IN A STREET.	12	Uncertified		40	40	
ANIMATICALINATION	12	Uncertified		40	40	

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

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for their RO. Individual progress is measured by both percentage complete and actual hours complete (see example below).

Pension RVSR Cumulative Progress		Progress		Hours
User ID	Mandatory	Station-Determined	Mandatory	Station-Determined
16.04800 000000000000000000000000000000000	0%	65%	0	6.5
A CONTRACTOR / INCOME VALUE AND A CONTRACTOR OF	0%	3%	0	1
A DISABILITI (RAMONIAL)	0%	23%	0	6.5
AND DESCRIPTION OF A DE	0%	15%	0	6
IN THE CONTRACT OF BRIDE	0%	9%	0	3.5
NAMES OF CONTRACTOR OF CONTRACTO	15%	13%	6	5

• Pension Mandatory and Station-Determined – represent a percentage of an employee's annual requirement. These percentages

take proration levels into account. It is expected that progress toward satisfaction of requirements will be evenly distributed across the year. For example, when one quarter of the year has passed, it is expected that an employee will have satisfied

Average Percenta	2/20/2014 0:00	
	Average	
Mandatory	3%	
Station-Determined	13%	
Number of Studer	nts who Complete	d NTC Requirements
	Completed	
Pension Mandatory	0	
Penstion Technical	0	

25% of his or her Station-Determined requirements.

Employees who are meeting this requirement are highlighted in green. Employees who are at least 10% behind expected progress are highlighted in yellow. Employees who are at least 20% behind expected progress are highlighted in red.

• **Training Plan Tool** – allows TMs to select an individual employee from a drop-down box and view all completed and incomplete items within each sub-curriculum.

Α	В		
	Select a TMS User ID in cell C1:	ALCON CHRISTOPHERING?	Ŧ
iculum 🖵	Title	A REAL PROPERTY AND ADDRESS OF	eari
A-315	Acceptable Clinical Evidence (ACE) Training		
A-316	CP Virtual VA	and designed as a lot of some	
A-316	CP Requesting Medical Opinions	and the second s	
A-316	CP Ready-to-Rate Claims	and the second second second	-
A-316	CP Individual Unemployability	789914	
A-316	Reader-Focused Writing (RFW) Tools Course-	959914	

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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: <u>PENSIONTRNG&QUAL.VBACO@va.gov</u>. For questions regarding this job aid, please contact <u>VBACurriculumSupport@Camber.com</u>.