Competency Based Training System (CBTS) Assessment Portal

Student Training Workbench – User Guide

May 20, 2022

Contents

LAUNCH THE ASSESSMENT PORTAL AND ACCESS THE STUDENT TRAINING WORKBENCH

Perform the following steps to access the Student Training Workbench and view outcomes from diagnostic testing.

1. Navigate to the Assessment Portal (https://vba-tpss.vbatraining.org/assess/)

2. Enter your login credentials into the **User name** and **Password** fields then select the **Log in** button.
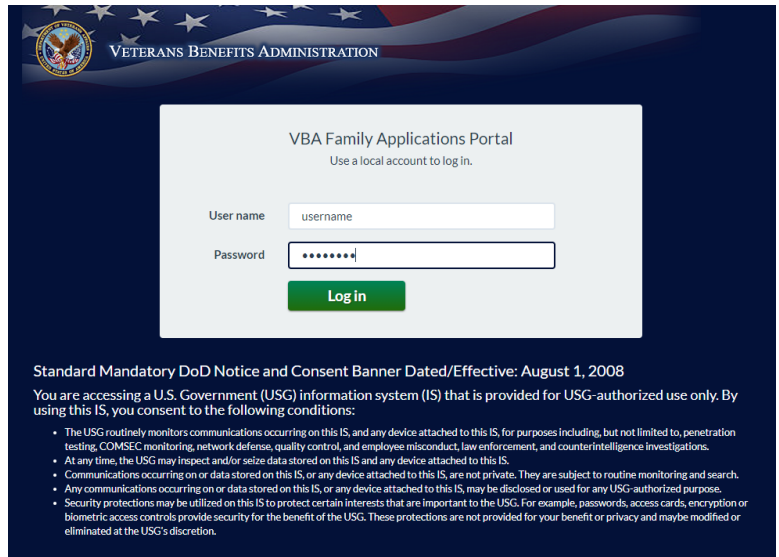
3. Open the **Student Training Workbench** by selecting the Menu and then the Student Training Workbench link.

   NOTE: While using the Reporting environment, you can quickly return to the **Student Training Workbench** using the Menu drop down button at the top right side of the window.
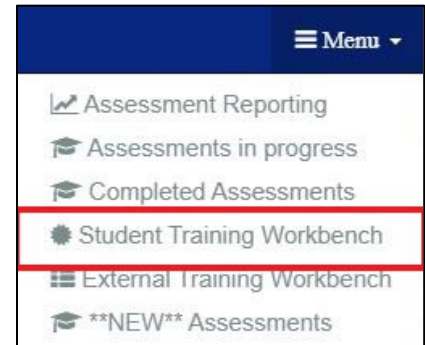
4. The Student Training Workbench employee list grid depicts all employees in your location who completed at least one of the Year 1 badge assessments. The grid enables you to access employee assessment results and provides some additional grid features explained below.

5. On the employees list grid, select the **Select** link next to an employee's name.

The employee's training workbench is displayed with the Training Items tab selected. For each training item with a "New" status, the Training Items tab displays actions to take, the item's status, when it was completed, its Talent Management System (TMS) number and title, and its training hours.

In the next section, the supervisor actions will be described.

6. The **directional arrow** changes the listing between Ascending and Descending Review a TMS training item's description by selecting its **TMS #** link.

(Select the **Close** button to close the window when you are done.)

7. View the diagnostic assessments associated with each training item by clicking the drop-down arrow next to the title. Clicking on the **assessment link** will allow you to view the individual feedback report.

NOTE: Some training items may be associated with several diagnostic assessments. The **Type** of association indicates if the TMS item is <u>required</u> or <u>optional</u> based upon the assessment results.

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Student Workbench Navigation

There are a variety of ways to navigate back to different pages:

- Select the **Home** breadcrumb link to go back to the **Assessment Reporting** home page.

- Select either the **Student Training Workbench** breadcrumb link or the **Up Level** button to return to the employee list to select another employee.

- You can also navigate to the **Assessment Reporting** home page or the **Student Training Workbench** employee list by selecting the **Menu** button to expand it, then selecting the appropriate link.
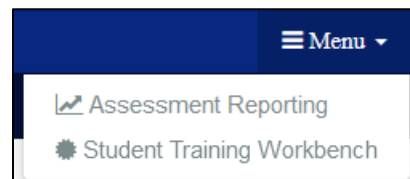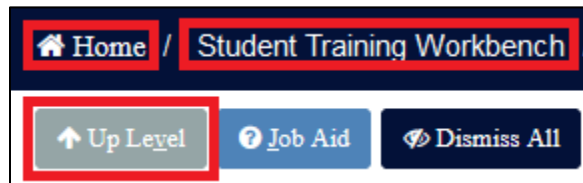
Student Workbench Grid Columns

	Select	Reports	Last Name	▲	First Name	▲	Actions	▼	To Award	Waiting on TMS

Awarded	Declined	Required Hrs	Assigned Hrs	Dismissed	Dismissed Hrs	Yr Cycle

Location	Job Title	Service	User Name

Column headings can be rearranged by clicking a heading and dragging it to the desired location while the mouse button is held down, then dropping the column in place by releasing the mouse button. The columns can be sorted by clicking on any column heading. In addition to student name and location, the following status columns provide meaningful information to the supervisor:

- **Actions** – The count of TMS items that need to be either assigned to TMS or dismissed. The process to award a badge cannot be started until all items are processed.
- **To Award** – Number of badges that can be awarded. Includes all badges for the 3-year cycle.
- **Waiting on TMS** – Number of TMS items that still need to be completed for the current cycle badges.
- **Awarded** – Number of badges awarded for the whole 3-year cycle.
- **Declined** – Number of badges declined for the whole 3-year cycle.
- **Required Hrs (Hours)** – Sum of the required items provided in the feedback reports for this cycle.
- **Assigned Hrs (Hours)** – Sum of the required items assigned for this cycle.
- **Dismissed** – Number of TMS items that were dismissed.
- **Dismissed Hrs (Hours)** – Number of hours that were dismissed.

- **Yr (Year) Cycle** – Badge cycle the user is currently in.

The **column filter textboxes** below the column headings enable you to search for employees in a variety of ways. Enter a complete or partial string in the textbox beneath the column heading and press the **Enter** key to filter the list. Selecting the icon that looks like a funnel or key 🔑 next to a textbox allows you to apply filter operations to the string you entered. For string fields like Last Name, the filter operations include *Begins with*, *Contains*, *Doesn't contain*, *Ends with*, *Equals*, and *Doesn't equal*. For numeric fields like Action, the filter operations include *Equals*, *Doesn't equal*, *Is less than*, *Is less than or equal to*, *Is greater than*, and *Is greater than or equal to*.

NOTE: You must press the Enter key after making changes to the search criteria to see filter results.

Sorting the Student Workbench Grid

You can sort the list of training items using the **Sort By** drop-down list at the bottom of the page.

Sort by options include:
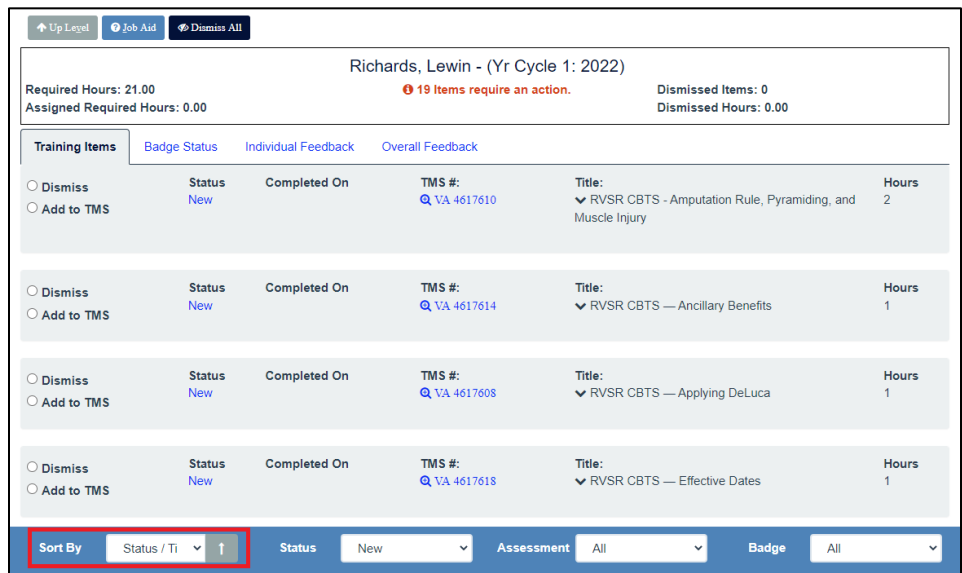
Status and Title – Sorts by status plus title.

Status – Sorts by status type.

Title – Sorts by TMS title.

TMS # – Sorts by TMS item ID.
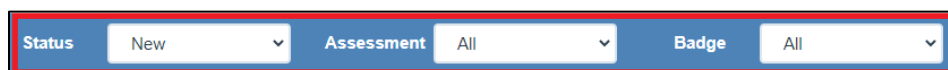
Hours – Sorts by number of learning hours.

Filtering the Student Workbench Grid

The **Status**, **Assessment**, and **Badge** boxes at the bottom of the screen allow you to filter based on what you select.

- The **Status** filter box allows you to filter based on these statuses:
  - **All** – Displays all training items regardless of Status
  - **New** – Displays new training items that have not been dismissed or added to the TMS, yet

- o **Previously Added** – Displays training items that had been added previously
- o **Dismissed** – Displays training items that have been dismissed from the list
- o **Added** – Displays training items that have previously been added to the employee's learning plan
- o **Removed** – Displays training items that were added and subsequently removed from the employee's learning plan
- The **Assessment** filter box allows you to filter the list of training items based upon the diagnostic assessment outcome.
- The **Badge** filter box enables the user to filter the list of training items based upon the type of badge.

  NOTE: The **Assessment** and **Badge** filter boxes only list assessments and badges per the badge schedule. Also, some training items may be associated with several diagnostic assessments and/or badges.

Student Workbench Grid Button Bar

The **button bar** above the column headings offers additional ways to use the grid:

TMS Required Actions ▾   The "**view**" button allows the user to save a preferred grid configuration. Some view configurations are preset for you.

- **TMS Required Actions** – Shows the count of TMS items that need to be assigned or dismissed.
- **Badges Awarded** – Shows the count of badges that have been awarded.
- **Badges Declined** – Shows the count of badges that have been declined.
- **Badges Ready for Review** – Shows the count of badges that are ready to be awarded or declined.
- **Waiting for TMS Completions** – Shows the count of TMS items that have been assigned but not yet completed by the employee.
- **Save View** – Save the column order, column sort, and applied filters.
- **Save View As** – Update an existing view.
- **Delete View** – Delete a saved view.

Customize ▾   The **Customize** button allows the user to configure columns, groups and export the list.

- **Column Filter** – Toggles the appearance of filter textboxes.
- **Columns** – Allows the user to add or remove columns from the view. The column headings can be dragged to and from the Customize list of column headings. Place mouse button in the blank space next to the column heading to add. Drag the column to align with the other Column headings and drop the column by releasing the mouse button.

NOTE: Before releasing the column heading, be sure the double arrows appear above and below the column heading.
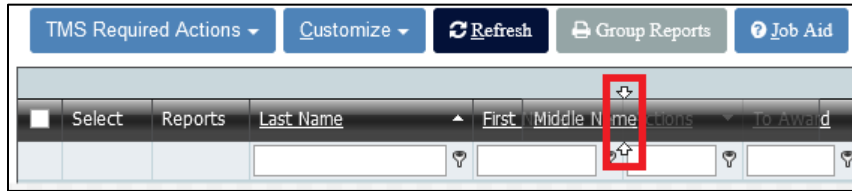
- **Grouping** – Toggles a grouping area that enables the user to group the list by any column heading, such as Job Title or Location. Place the mouse cursor in the blank space of the column heading to use for grouping. Drag the column to the grouping area located above the column headings and drop the column by releasing the mouse button.
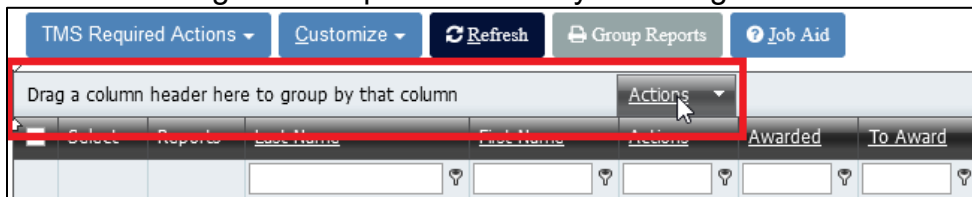
To remove the grouping, drag the column to align with the other Column headings and drop the column by releasing the mouse button. **NOTE**: Before releasing the column heading, be sure the double arrows appear above and below the column heading.

- **Export** – Opens a dialog box to export the grid list in several formats. XLS and XLSX are Microsoft Office Excel file formats, CSV or Comma-Separated Values produces a text file of data.

The **Refresh** button updates the grid list. This may be needed if you are viewing multiple instances of the grid and external changes are being made in the workbench.

Group Reports opens a pop-up window to quickly access Badge Process Details and Diagnostic assessments with reports.
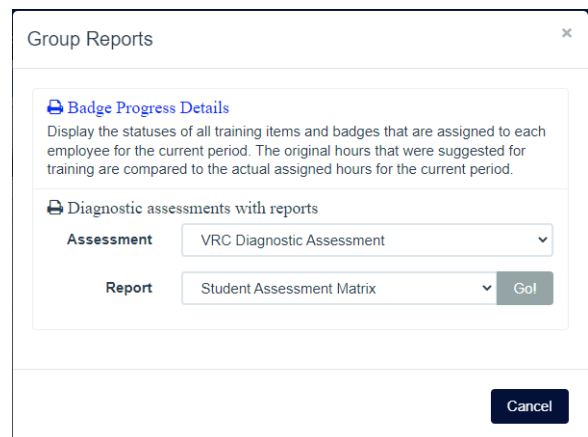
Selecting the **Job Aid** button opens the current version of this job aid.

Selecting the **Dismiss All** button dismisses all training items from the current view. This button is described more fully in the **How to Process Diagnostic Assessment Results** section.

PROCESS DIAGNOSTIC ASSESSMENT RESULTS

Perform the following steps to review diagnostic test results, to complete supervisor actions such as assigning or dismissing recommended training, and to award badges.

Workbench Status

An employee cannot be awarded a badge until you have dispositioned each TMS item listed in the workbench by either assigning training or dismissing recommended training. The employee's name includes the badge cycle for the current fiscal year.

- **[##] Items require an action.** This lets you know that you still have items that must be added or dismissed before the employee can become eligible for a badge. This number is reduced by **Add to TMS** and **Dismiss** actions described below.

  Tibbott, Diane - (Yr Cycle 1: 2019)
  16 Items require an action.

- **Waiting for [##] items to be completed in TMS.** You are waiting for this many TMS items to be completed that were assigned for the current FY badges.

  Stotler, Kayla J - (Yr Cycle 1: 2019)
  Waiting for 9 items to be completed in TMS.

- **A badge is ready for award.** The employee has completed the requirements for one of more badges to be awarded.

  Vessa, Robert M. - (Yr Cycle 1: 2019)
  A badge is ready for award.

Add Training to Employee's TMS Learning Plan

From the employee's results page in the Student Training Workbench, add training items to the employee's TMS Learning Plan by selecting **Add to TMS**. When this radio button is selected, the **Add Training Item** dialog box is displayed.

Training Items	Badge Status	Individual Feedback	Overall Feedback			
○ Dismiss	**Status**	**Completed On**	**TMS #:**	**Title:**		**Hours**
○ Add to TMS	New		🔍 VA 4617610	⌄ RVSR CBTS - Amputation Rule, Pyramiding, and Muscle Injury		2

IMPORTANT: When a training item needs to be added to an employee's TMS 2.0 To Do list, it is important to <u>use the Student Training Workbench to perform this action</u>.

1. In the **Add Training Item** dialog box, provide the following answers for the TMS item:

- **Is this training required**? Select the Optional radio button if the training is not required, i.e., suggested.
- **Complete by this date** can be customized by clicking either the calendar widget or typing it in the mm/dd/yyyy format or leaving it blank.

This data will be used when the item is added to your employee's learning plan. **NOTE**: Optional training with or without a date is not trackable for compliance.

Select the **Add** button to send the information to the TMS. The item will be added to the employee's learning plan within 30 minutes.

Select the **Cancel** button to return to the list.

> **Add Training Item**   ✕
>
> This item will be added to the students learning plan.
>
> **TMS #:**   VA 4617610
> **Title:**   RVSR CBTS - Amputation Rule, Pyramiding, and Muscle Injury
>
> **Is this training required?**
> ◉ Required   ○ Optional
>
> **Complete by this date**
> 09/30/2022   📅
>
> Cancel   **+ Add**

2. Once the item has been added, the Status is changed to "Added" (with the Complete By date), the hours value is incremented (<u>Current FY</u> hours or <u>No due date</u> hours) to provide the user with the total number of training hours assigned through the Student Training Workbench, and the total number of actions is reduced. The employee's TMS learning plan will be populated.

NOTE: Only Optional items will allow the date field to be empty, i.e., no due date (Complete by NTL). Optional training, with or without a date, is not trackable for compliance.

Remove Training from Employee's TMS Learning Plan

To remove an item from the employee's learning plan in TMS after it has already been added using the CBTS Student, click the green button. The **Remove Training Item** dialog box is displayed.

Confirm the action by clicking the **Remove** button. This action is usually completed in 30 minutes within the TMS.

**IMPORTANT**: When a training item needs to be removed from an employee's TMS To Do list, <u>use the Student Training Workbench to perform this action</u>. You must email the help desk if you need to re-add the item.
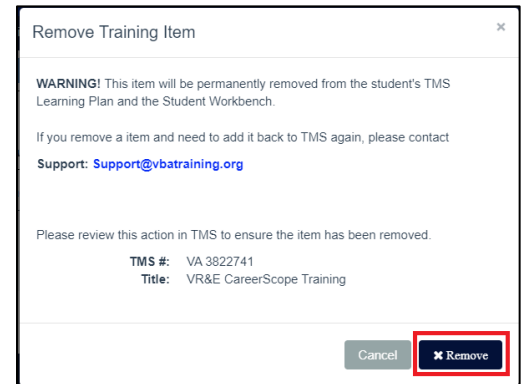
Dismiss a Recommended Training Item from Badge Requirements

As the user considers each training item based upon the diagnostic assessment performance and VR&E guidance, training items may be removed from the list view by selecting **Dismiss**. The Dismiss Training Item dialog box is displayed.

To complete the action, select the **Dismiss** button.
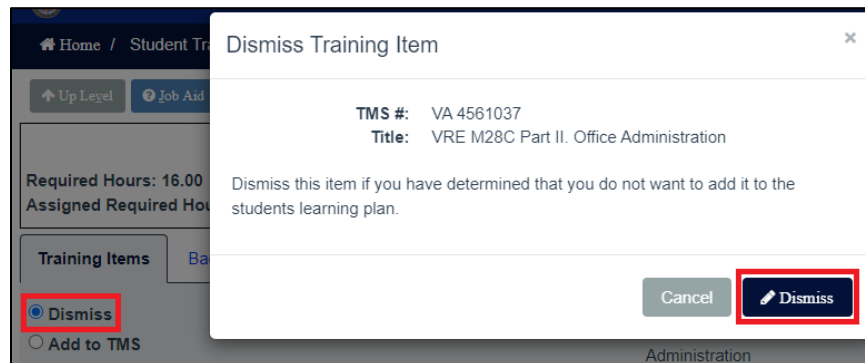
Once the item has been dismissed, the status changes to Dismissed and the total number of actions is reduced. This action does not affect the employee's TMS To Do list.

## Add a dismissed Training Item to Employee's TMS Learning Plan

If the user later decides to add the training item to an employee's learning plan, the item is accessible by changing the **Status** filter to **All** or **Dismissed**.
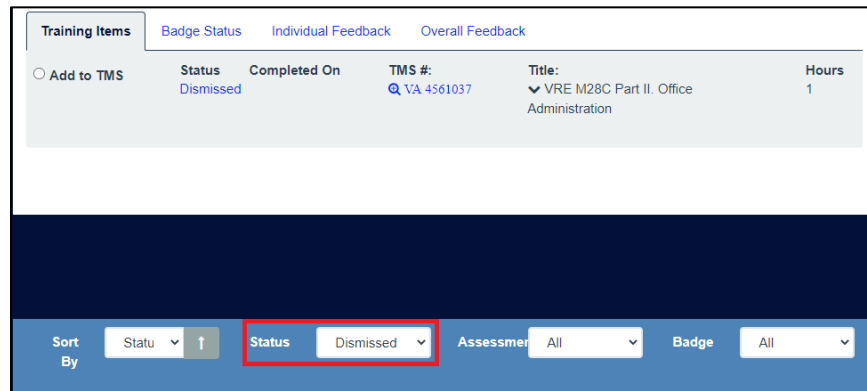
Dismiss All Recommended Training Items from Badge Requirements

The **Dismiss All** button will dismiss all remaining items where the status is **New** or **Previously Added.** If the assessment and / or Badge filters are applied, then only those items will be dismissed.

On the **Dismiss All Remaining New Items** window, select the **Dismiss All** button to complete the action.
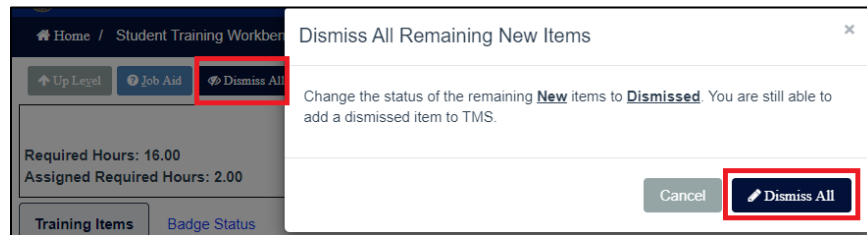
NOTE: The badge award-or-decline function will be available after all items have been dismissed. The employee, supervisor, and training manager will need to agree if all items are being dismissed.

PROCESS (AWARD OR DECLINE) A BADGE

Badges are eligible for award once all actions are processed and required training requirements are met.

- The badge tab is automatically selected if there are any badges available.
- The current year badges are always listed first followed by the future year badges.


Each badge is listed with detailed information.

- **Status** – The status of the badge process. If the badge can be awarded, a green button is used to process the badge. Otherwise, an icon is used to represent each status. A tooltip that describes each status is displayed when hovering your mouse over the image.
  NOTE: Hover over the status images to see their status definitions.
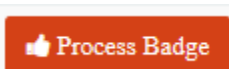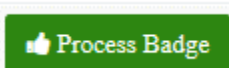
  - **Process Badge** (green) – Badge is ready for first review. Note that you can award badges for a future year if there were no suggested TMS items from the assessments related to the badge.
  - **Process Badge** (red) – This badge was **declined** to be awarded. Hover over it to see who declined it and why. Note that you can decline this badge as many times as you deem necessary.

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- ⊠ o **Calendar Icon** - This badge is not being evaluated this year. There are TMS items that will need to be addressed when the year cycle is active.
- 🕐 o **Clock Icon** - Waiting on [##] TMS items to be completed before this badge can be considered for award.
- ☹ o **Sad Emoticon** - Has not completed the required assessments needed for this badge.
- **Yr Cycle** – The year cycle the badge is to be worked on for award.
- **Awarded On** – The date the badge was awarded to the employee.
- **Badge / Badge Requirements** – The requirements that must be fulfilled for badge award.

Process a Badge

Once a badge is eligible for award, a "**Process Badge**" button will appear (see Badge Status above). Click on a badge button and the Award: _Badge Name_ dialog box is displayed.

In the Award dialog box, select one of the following:

- **I Certify** – This will award the badge as follows:
  a. Send a completion to TMS
  b. Record when the badge was awarded
  c. Record the logged in person as the person that awarded it
  d. Set the expiration date based on the current fiscal year and the year cycle the badge is in
  e. Record your remarks which are optional
  f. Certification cannot be undone

- **I Decline** – This will tag the employee badge as not certified as follows:
  a. You will be able to certify if you decline the badge at any time after you decline
  b. You must provide a reason in the Remarks
  c. Record the logged in person as the one who declined it
  d. There is no limit on how many times a badge can be declined. Use this for historical records which the application maintains.
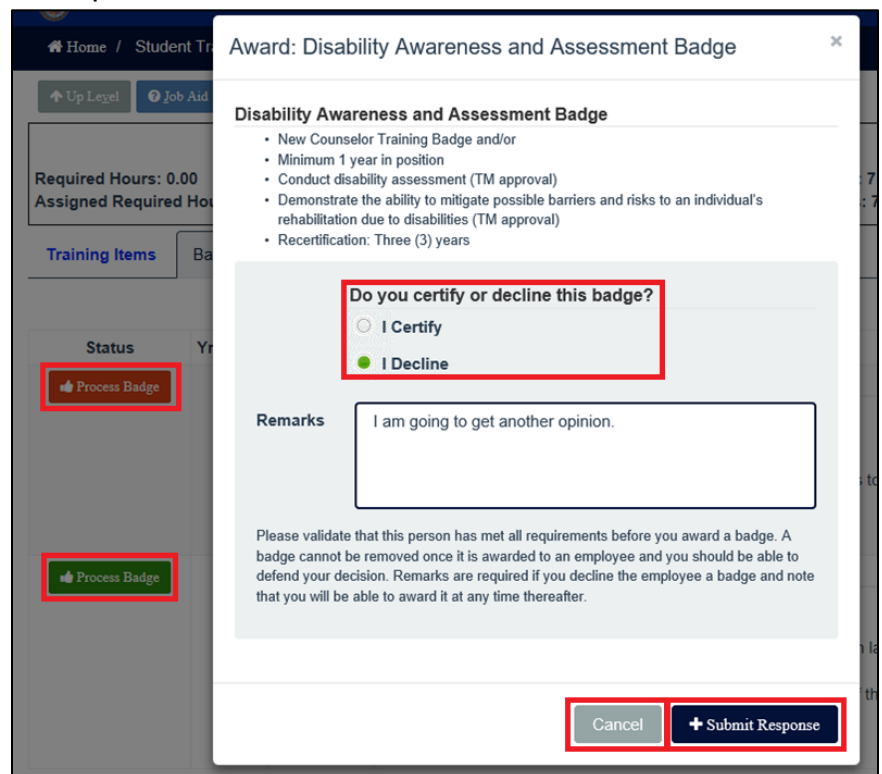
Awarded Badges

After the badge is awarded, you will see

- An image of the badge. Hover over the image to see who awarded it.
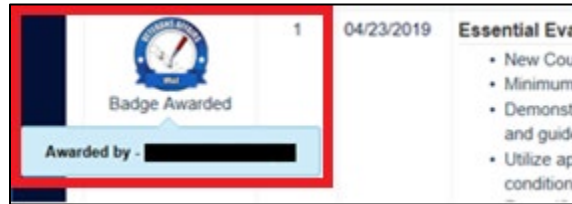
- The date on which it was awarded. Hover over the date to see when this badge will expire. **NOTE**: The date may be in red which indicates the badge is expired and the employee needs to be recertified.

Declined Badges

If the badge was declined, the Process Badge button turns red. Hover over it to see the last person that declined the badge and why they declined it.
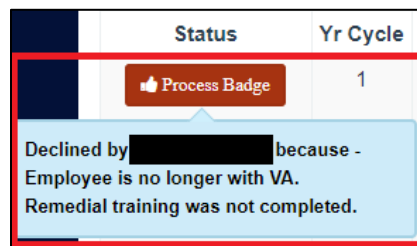
FOR ADDITIONAL INFORMATION

For additional information or technical support, please contact the Support Desk at Support@VBATraining.org.