Training Accountability System (TAS)
Manager Menu Step-by-Step Guide

CONTENTS:

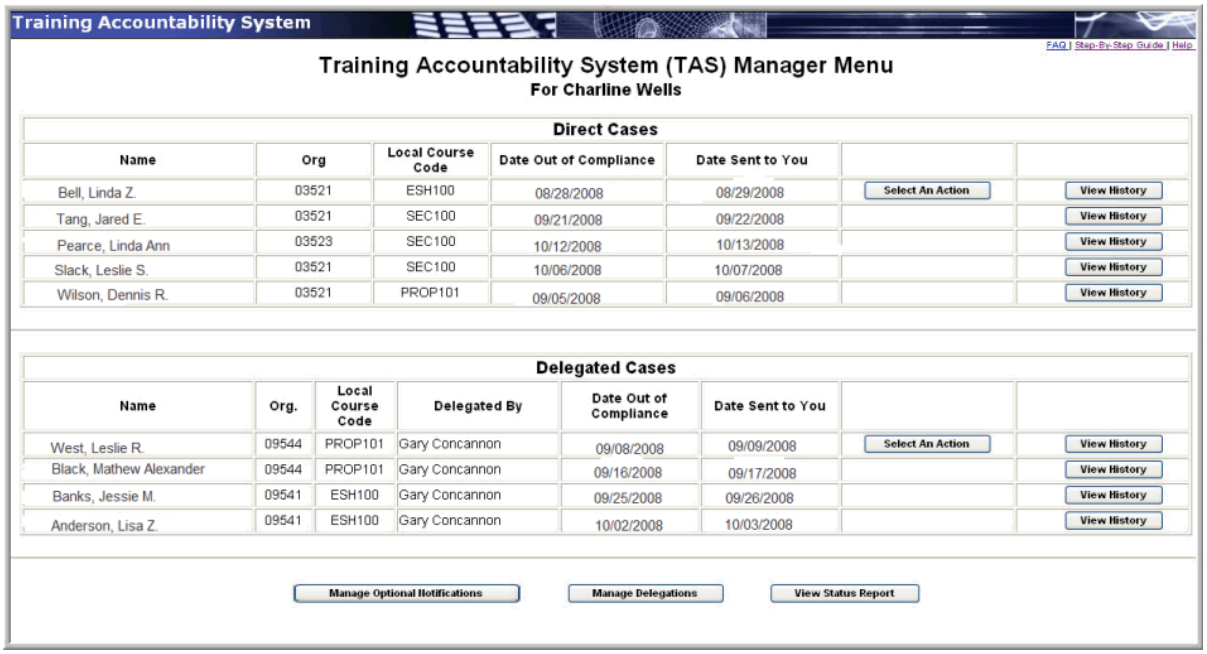
Introduction

The Training Accountability System, or TAS, is a management tool that provides an easy-to-use consistent process for managing training compliance for direct reports and anyone delegated to you. Utilizing data from TEDS, TAS sends managers electronic notifications with the names of individuals who are out of compliance with required training.

The Step-by-Step instructions for the actions you need to take are provided in this document.

The TAS Tool

TAS Manager Menu – The Manager Menu screen acts like a "Home Page", displaying command buttons and any open out-of-compliance cases. The cases include individuals assigned to your organization, as well as any delegated individuals, requiring action on your part.



Training Accountability System

FAQ | Step-By-Step Guide | Help

Training Accountability System (TAS) Manager Menu
For Charline Wells

Direct Cases

Name	Org	Local Course Code	Date Out of Compliance	Date Sent to You		
Bell, Linda Z.	03521	ESH100	08/28/2008	08/29/2008	Select An Action	View History
Tang, Jared E.	03521	SEC100	09/21/2008	09/22/2008		View History
Pearce, Linda Ann	03523	SEC100	10/12/2008	10/13/2008		View History
Slack, Leslie S.	03521	SEC100	10/06/2008	10/07/2008		View History
Wilson, Dennis R.	03521	PROP101	09/05/2008	09/06/2008		View History

Delegated Cases

Name	Org.	Local Course Code	Delegated By	Date Out of Compliance	Date Sent to You		
West, Leslie R.	09544	PROP101	Gary Concannon	09/08/2008	09/09/2008	Select An Action	View History
Black, Mathew Alexander	09544	PROP101	Gary Concannon	09/16/2008	09/17/2008		View History
Banks, Jessie M.	09541	ESH100	Gary Concannon	09/25/2008	09/26/2008		View History
Anderson, Lisa Z.	09541	ESH100	Gary Concannon	10/02/2008	10/03/2008		View History

Manage Optional Notifications | Manage Delegations | View Status Report

Command buttons on the Manager Menu make the action steps easy: Select An Action; View History; Manage Optional Notifications; Manage Delegations; and View Status Report.

To navigate in TAS, click on one of the command buttons for a hyperlinked selection; use the TAS Menu Bar FAQ | Step-By-Step Guide | Help; or use the back arrow icon  in the Internet Menu Bar at the top of your screen.

How Do I Manage Out of Compliance Notifications?

When you receive a TAS Out of Compliance Notification, such as, "The following individual(s) assigned to your organization is past due for required compliance training." your first step is to click on the TAS URL in the notification. The TAS Manager Menu displays with "Direct Cases" and any "Delegated Cases" requiring your action. Click on the displayed button to the far right of the individual's name to begin the required action, e.g., [Select An Action] or [View History].

Select an Action

Click on the [Select An Action] command button to the right of a listed TAS case to:
(1) specify an out of compliance reason;
(2) view the associated action to be taken; and
(3) specify the due date by which the action is to be completed.

For detailed definitions of the Out of Compliance Reason selections or additional notes, click on the "Help" hyperlink in the TAS Menu Bar.

- Complete the following fields:
  - **Select an Out of Compliance Reason -** Click on the drop-down arrow and select the appropriate reason.
  - The **Action to be Taken** field automatically populates with text based on the reason selected in the first step.
  - **Select a due date for this action (must be no later than xx/xx/xxxx** – Enter a date or click on the calendar icon to select a date.
- Click [Next] to continue.
- The screen displays a confirmation. Click [Finish] if the information is correct. If the information is ***not*** correct, click [Cancel and Return to Main Menu].

Note:
The Select An Action command button may display for a TAS case if there is *both* a History available *and* the TAS case is awaiting action from you, your Reviewer/Approver delegate or another manager for whom you are a Reviewer/Approver delegate.

If the Select An Action command button is not displayed for a TAS case, this means that an action has already been specified for it, either by you or by your Reviewer/Approver delegate.

How Do I View History?

View History
This screen permits you to view the history of actions for a TAS out of compliance case.
Click on the View History command button to view the current status of a listed TAS case and all of the actions taken for it to date. Each action taken for a TAS out of compliance case is listed, in descending time order.

Click on **"Help"** in the upper right corner of your screen for definitions of the main headings: **Notification Date; Escalation Level; Manager; Action Taken by; Action Due Date; Action Close Date; Out of Compliance Reason; Action Taken; and Results.**

If the View History command button is not displayed for a TAS case, this means that no history is yet available for that case.

How Do I View a Status Report?

On the TAS Status Report screen, you can view reports for your organizations(s) and, if you have any delegators, your delegators' organizations as well.

- Complete the following field:
  - **Complete or Partial Org. # -** Click on See Org. List to select from the list of organizations available to you. (Alternatively, you can enter at least 2 digits of an organization number, i.e., 03, 12, etc.)
  - **Click on** Submit **.** The TAS Status Report for that org displays.

Note: Training Coordinators and Course Contacts have access in TAS to run their own reports. The "TAS Training Coordinator Report" provides Training Coordinators a listing of all "Open" TAS cases for a designated organization or group of organizations within their hierarchy. The "TAS Course Contact Report" provides Course Contacts a listing of all "Open" TAS cases for a designated course code.

How Do I Manage Optional Notifications?

The TAS Optional Notifications screen permits you to activate or deactivate optional training notifications for the individuals assigned to your organization. The notification interval can be changed to "None, 10, 20, or 30 Days". Based on the number of days you select, upcoming target finish date notifications for Compliance courses for your direct reports will be sent to you. This optional notification is in addition to the notification sent to you 5 days and 2 days prior to the individual's target finish date.

To activate optional notifications or specify a new notification interval:

- Click on and select the desired notification interval (10, 20, or 30 days) from the drop down list.
- Click on the Submit button.

To deactivate notifications:

- Select "NONE" from the drop down list.
- Click on the Submit button.

To return to the Manager Main Menu without saving changes:

- Click on the Cancel button, or click on the "Main Menu" hyperlink at the top right corner of the page.

How Do I Manage Delegations?

Use the TAS Delegate Details screen to view or change delegates.

Use the following table to determine the actions performed on this screen:

IF you want to …	THEN …
Add a Delegate	• click on ADD DELEGATE • in the **Delegate Name** field, enter the name of a delegate. • click on the Tab key. Select a name from the pick list which displays. • in the **Role** field, click on ▾ and select a role for the delegate. **Note:** ONLY ONE delegate can have the Reviewer/Approver role and that person must be a member of management. • click on Submit . • a message displays confirming the changes have been processed.
Make a change to the existing list of Delegates	• click in the radio button ○ next to "Remove" in the row of the Delegate you wish to remove. • click on UPDATE . • a message displays confirming the changes have been processed.