



**Period-Based Curricula**  
VA TMS Administrators  
Role-Based Training

Virtual Instructor-Led Training  
Participant Guide  
December 2020

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## 1.0 Session Overview

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### 1.1 Introduction

Thank you for attending the Veterans Affairs (VA) Talent Management System (TMS) Administrator Role-Based Training: Period-Based Curricula. This is a stand-alone, role-based course and is designed to teach administrators skills that are necessary for completing tasks that are associated with period-based curricula, initial and retraining dates, and required dates.

A Web conferencing software tool will be used to conduct the training sessions.

### 1.2 Course Goal

This session provides instruction and interactive practice related to creating and modifying basis, initial, and retraining dates for curricula in the VA TMS.

At the end of this session, participants should be able to:

- Understand period-based curriculum
- Determine initial and retraining dates
- Set required dates within an item
- Use Edit Required Dates

### 1.3 Target Audience

The participants of this course are Domain Managers, Learning Managers, and Item Managers.

## 1.4 Participant Guide

This Participant Guide is attached to the web-conferencing session and is divided into two sections:

- About This Training
- Training Content

**NOTE: Print a hard copy of this Participant Guide to use during training.** You will need to reference the steps for all demonstrations and activities in these guides while completing steps in the VA TMS.

**Table 1: Participant Guide Icons**

Icons	Description
	This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS TRAIN environment.
	This icon indicates that participants will complete an activity in VA TMS TRAIN environment.
	This icon indicates that there is a job aid available for the task.

## 1.5 Participant Preparation and Guidelines

Participants must complete the following for this training:

- Register for training through the VA TMS.
- Attend the Virtual Instructor-Led Training (VILT) Web conferencing session.
- Complete the post-training survey.

## 1.6 Demonstrations and System Practice Activities in VA TMS TRAIN Environment

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS TRAIN environment. These demos and activities will allow you to

study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and activity have been provided in this guide so you can follow along. You may also want to reference these steps after the training.

### 1.7 *Virtual Instructor-Led Training Guidelines*

This training will be delivered as a Virtual Instructor-Led Training (VILT) using Web conferencing software. You will need a computer and phone with speakers or a headset to participate in this training. Follow the guidelines below to ensure the best training experience:

- Print a hard copy of this Participant Guide to use during training.
- Be sure to log in to the Web conferencing software and dial into the conference line 5 – 10 minutes early.
- Mute your phone line for the duration of the training session unless otherwise instructed.
- Use the chat feature for any questions during the session.
- The instructor may be able to answer your questions immediately. Otherwise, they will answer at the end of the training or send an e-mail afterward.

### 1.8 *Course Length*

The table below includes a list of all training lessons in the session, along with estimated times.

**Table 2: Session Lessons and Durations**

Lesson Title	Estimated Time
Welcome and Introduction	10 minutes
Lesson 1: Period-Based Curriculum Overview	30 minutes
Lesson 2: Determining Required-By Dates	20 minutes
Lesson 3: Setting Required-By Dates	30 minutes
Lesson 4: Edit Required Dates	30 minutes

**Total: 2 hours**

## 2.0 Role-Based Training: Period-Based Curricula

### 2.1 Welcome and Introduction

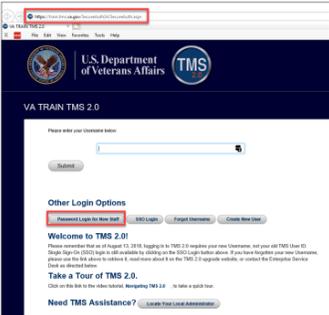
### System Login

- In your browser, navigate to:  
<https://train.tms.va.gov/SecureAuth34/>
- Select the **Password Login for New Staff** button.
- Enter your TRAIN Admin ID and Password.

Audio (opens 10 minutes before class):

- Dial into the AUDIO-VANTS LINE:  
1-800-767-1750
- ACCESS CODE: 48596#

Download and print the Participant Guide from the class email or from the class chatroom.

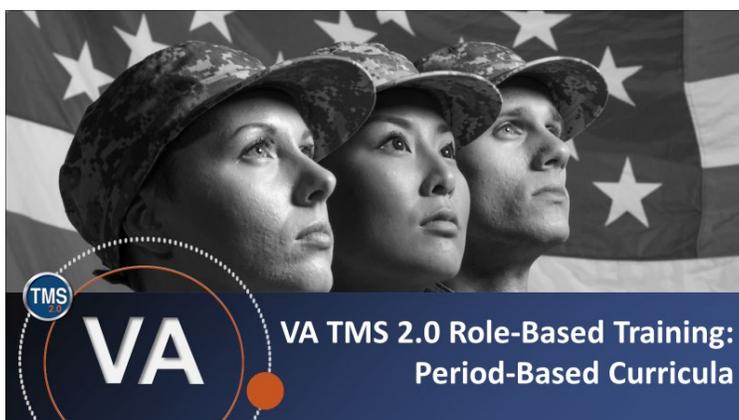


Slide 1: System Login

### System Login

Ten minutes before class begins, follow the instructions on the slide to login to the TRAIN environment and dial into the Audio-VANTS line. Ask any questions you may have for me using the chat feature.

- Train Environment Link:**  
<https://train.tms.va.gov/SecureAuth34/>
- Select Password Login for New Staff
- Enter your TRAIN Admin ID and Password
- VANTS Line Audio:** 1-800-767-1750
- Access Code:** 48596#



Slide 2: VA TMS Administrator Role-Based Training: Period-Based Curricula

### Welcome

Welcome to the Period-Based Curricula Role-Based Training.

If you have any questions throughout the training session, you can send a message through the Chat function, and the instructor can answer it or show a demonstration where appropriate. Otherwise, there will be a question session at the end of the training.

Also, please make sure that you mute your phone lines to minimize any background noise during the training session.

## PARTICIPANT INTRODUCTIONS

- Your name (including any nicknames)
- Where you work



Slide 3: Participant Introductions

## Participant Introductions

Please introduce yourself in the chat room by sharing your name (including any nicknames) and where you work.

## PARTICIPANT GUIDE

- Copies of all PowerPoint slides
- Space for taking notes
- Directions for completing individual and group activities



Slide 4: Participant Guide

## Participant Guide

Each of you should have a Participant Guide that has been developed to support learning during and after the session. This guide contains copies of all PowerPoint slides, space for taking notes, and directions for completing activities. If you do not have a copy of the Participant Guide available, please speak up now so that we can make sure everyone is on the same page.

## LOGISTICS

- Scheduled breaks
- Use the chat feature to ask questions
- Ensure your audio is on mute



Slide 5: Logistics

## Logistics

- There will be a 10-minute break provided every hour.
- Use the chat feature to ask questions.
- Ensure your audio is on mute and do not put the call on hold at any time during the training.

## COURSE GOALS

This training will provide instruction and interactive practice related to initial and retraining assignments within a curriculum.



Slide 6: Course Goals

## Course Goals

The goal of this training is to provide instruction and interactive practice related to initial and retraining assignments within a curriculum.

## TRAINING METHODS

- Content Presentations
- Instructor Demonstrations
- Practice Activities
- Knowledge Checks

## Training Methods

Although there will be session-specific variations, each VILT session will include the following training methods:

- **Content presentations:** content presentation refers to the delivery of the training to best facilitate participants' engagement and the content presentations. These include the visual elements of the PowerPoint slides and demonstrations and activities within the VA TMS.
- **Instructor demonstrations:** I will demonstrate many of the VA TMS tasks you will perform as an administrator or reports manager.
- **Practice activities:** you will practice key actions through hands-on activities in the VA TMS.
- **Knowledge checks:** your knowledge of key content will be assessed through multiple-choice/true-false knowledge checks.

Slide 7: Training Methods

## SESSION AGENDA

- **Lesson 1:** Period-Based Curriculum Overview
- **Lesson 2:** Determining Required-By Dates
- **Lesson 3:** Setting Required-By Dates
- **Lesson 4:** Edit Required Dates



Slide 8: Session Agenda

## Session Agenda

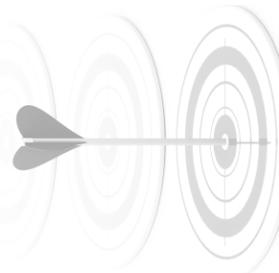
This training session is 2 hours long and is organized as follows:

- Lesson 1: Period-Based Curriculum Overview
- Lesson 2: Determining Required-By Dates
- Lesson 3: Setting Required-By Dates
- Lesson 4: Edit Required Dates

## SESSION OBJECTIVES

After completing this session, you will be able to:

- Understand Period-Based Curriculum
- Determine initial and retraining dates
- Set required dates within an item
- Use Edit Required Dates



Slide 9: Session Objectives

## Session Objectives

After completing this session, you will be able to:

- Understand Period-Based Curriculum
- Determine initial and retraining dates
- Set required dates within an item
- Use Edit Required Dates

## QUESTIONS?

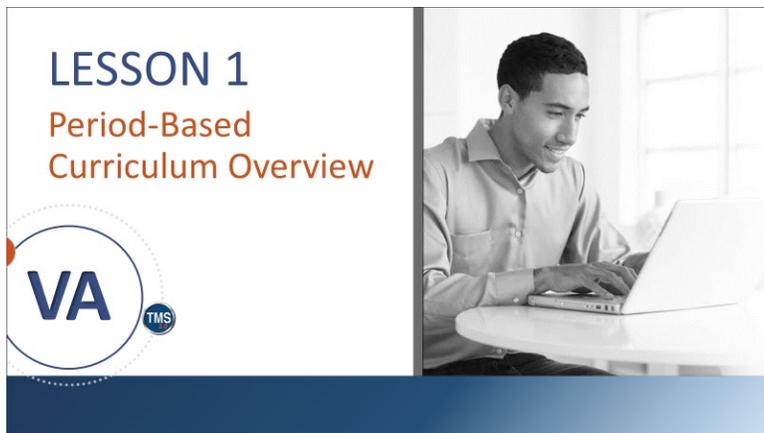


Slide 10: Questions?

## Questions?

If you have any questions about the material that will be covered today, please ask them through the chat feature at this time.

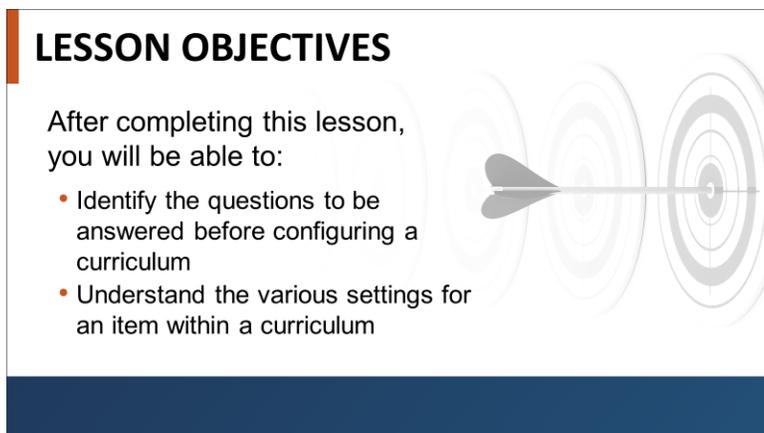
## 2.2 Lesson 1: Period-Based Curriculum Overview



Slide 11: Lesson 1: Period-Based Curriculum Overview

### Lesson 1: Period-Based Curriculum Overview

Lesson 1 covers the topic of period-based curricula.



Slide 12: Lesson 1 Objectives

### Lesson 1 Objectives

After completing this lesson, you will be able to:

- Identify the questions to be answered before configuring a curriculum
- Understand the various settings for an item within a curriculum

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Table 3: Period-Based Curriculum Terminology

Term	Definition
<b>Basis Date</b>	<p>A calendar day which defines the beginning point of a period of time.</p> <p>Using the basis date system, you can assign learning that is due (for example) once a quarter or once a year but permit the user to complete it at any time during that quarter or year.</p>
<b>Curriculum/Curricula</b>	<p>A group of items or curriculum requirements that can be assigned to users and have its completion status tracked as a group.</p> <p>Curricula, which defines more than one curriculum, can recalculate required-by dates on items that have been completed but must be repeated on a recurring basis.</p>
<b>Effective Date</b>	<p>The calendar day when an item has an impact on the overall curriculum status/due date.</p>
<b>Event Basis</b>	<p>A method used to set items' initial and retraining assignments; VA TMS defines Event Basis as either a user's hire date or assignment date.</p>
<b>Initial Assignment</b>	<p>The amount of time a user has to initially complete an item. The initial assignment is identified in either days, weeks, months, quarters, or years.</p>
<b>Initial Basis</b>	<p>The type of event designated as an item's original training assignment.</p> <p>For example, when a user is assigned an item with an initial assignment of 30 days, that initial assignment is event-based.</p>
<b>Learning History</b>	<p>A record of all learning events with a completion status for the user.</p>
<b>Period-Based-Curricula</b>	<p>A set amount of time the user is given to complete items within one or more curricula.</p>

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Period-Based Curricula

Questions to consider:

- How much initial completion time should be granted to the user?
- Does an item within a curriculum have a firm required-by date for all users regardless of when it is assigned?
- Do the items within the curriculum require retraining?

Slide 13: Period-Based Curricula

## Period-Based Curricula

After an admin groups items into a curriculum, the following questions need to be answered:

- How much initial completion time should be granted to the user?
- Does an item within a curriculum have a firm required-by date for all users regardless of when it is assigned?
- Do the items within the curriculum require retraining?

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Item Settings

Each item in a curriculum has the following settings:

- Initial Assignment
- Retraining Assignment
- Basis Date
- Effective Date
- Assignment Type



Slide 14: Item Settings

## Item Settings

There is no limit to the number of items that may be added to a curriculum. Each item in a curriculum has the following settings:

- **Initial Assignment:** The amount of time a user has to initially complete the item
- **Retraining Assignment:** The amount of time a user has to retake and complete the item once he or she successfully completes the item
- **Basis Date:** Defines the beginning point of the time-periods. The time-periods themselves are built using either the initial assignment or the retraining assignment information. Once the item is completed, it is not due again until the end of the next period. Using the basis date system, you can assign learning that is due once a quarter, or once a year, but permit the user to complete it at any time during the quarter or year
- **Effective Date:** The date when the item has an impact on the overall curriculum status/due date.
- **Assignment Type:** Required or Optional or other related types

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Retraining

- Items that must be repeated on recurring intervals will have a retraining assignment
- Once the item is complete and recorded, it is flagged as complete
- The next required-by date will be calculated by the retraining assignment

Slide 15: Retraining

## Retraining

When a user needs to complete an item on a recurring basis, it must be in a curriculum and have a retraining period.

Once an item is complete and recorded, it is flagged as complete.

The next required-by date will be calculated by the retraining assignment.

## Effective Date

- A user must complete a required item before the effective date to avoid a curriculum status of Incomplete
- If an effective date is in the future, it will not impact the overall completion status of the curriculum
- Effective dates only impact Incomplete and Complete curricula status and do not change required dates

Slide 16: Effective Date

## Effective Date

The effective date refers to the date the curriculum status changes to Incomplete if the user has not completed a required item. This is equivalent to a grace period.

If an effective date is in the future, it will not impact the overall completion status of the curriculum.

Effective dates only impact Incomplete and Complete curricula statuses and do not interfere or change required dates.

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the user:

- Required
- Optional

A user must complete all required items to obtain a Complete curriculum

Slide 17: Assignment Type

## Event vs. Calendar Basis

Admins have two options available when setting initial and retraining assignments:

- **Event Basis:** Hire date or assignment date only
- **Calendar Basis:** A particular date on the calendar

**Note:** You will see Calendar Basis on your screen, but the VA does not use Calendar Basis requirements.

Slide 18: Event vs. Calendar Basis

## Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the user, such as Required or Optional.

A user must complete all required items (and any requirements on the Curriculum Requirements link) to obtain a Complete curriculum status.

## Event vs. Calendar Basis

The system has two options available when setting initial and retraining assignments:

- **Event Basis:** Hire date or assignment date only
- **Calendar Basis:** A particular date on the calendar. The VA does not use calendar basis.

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Event Basis: Assignment Date

Using event basis, the TMS calculates the required date by completing the current period and then adding the initial/retraining assignment.

Triggers for required date calculation:

- Assignment date (initial assignment)
- Learning History completion date (retraining basis event)

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

- Initial Assignments: Initial Number: [text input], Initial Period: [Days dropdown]
- Initial Basis:  Calendar  Event
- Previous Completions:  Ignore Previous Completions Older Than [ ] Days
- Required Date Basis:  Assignment Date  Hire Date
- Retraining Assignments: Retraining Number: [text input], Retraining Period: [Days dropdown]
- Retraining Basis:  Calendar  Event

Slide 19: Event Basis: Assignment Date

## Event Basis: Assignment Date

Using event basis, the VA TMS calculates the required date by **completing the current period and then adding the initial/retraining assignment**. The triggers for required date calculation to begin are:

- Assignment date (initial assignment) or the user's hire date
- Learning History completion date (retraining assignment)

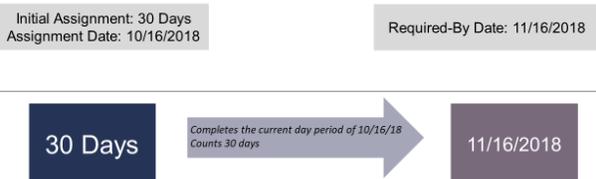
When selecting the period of days, the VA TMS does not start counting until the current day ends.

If you select Assignment Date as the required date basis, then the system calculates all of the completion statuses and next assignment dates based on when the curriculum was assigned to a user.

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Event Basis: Hire Date

If set to Hire Date, the system uses the user's date of hire as the required date basis to calculate completion status and next assignment date.



Slide 20: Event Basis: Hire Date

## Event Basis: Hire Date

Sometimes you will want the calculations to be based on when new employees are hired. Therefore, if you select Hire Date as the required date basis, then the system uses the value in the Hire Date from the user's record to calculate completion status and next assignment dates.

For example, let's say a user is assigned an item with an initial assignment of 30 days and an assignment date of 10/16/2018. The system calculates a required-by date of 11/16/2018. It completes the current day period of 10/18, then counts 30 days.

When a user needs to complete an item on a recurring basis, the item must be in a curriculum.



- a) True
- b) False

KNOWLEDGE CHECK

## Knowledge Check

Answer this question by entering your response in the chat window.

When a user needs to complete an item on a recurring basis, the item must be in a curriculum.

- a) True
- b) False

Slide 21: Knowledge Check

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

When setting assignments, the VA requires you set Initial and Retraining Data to \_\_\_\_.



KNOWLEDGE CHECK

- a) Event Basis
- b) Calendar Basis
- c) Either Event or Calendar Basis
- d) Neither Event or Calendar Basis

Slide 22: Knowledge Check

### Knowledge Check

Answer this question by entering your response in the chat window.

When setting assignments, the VA requires you set Initial and Retraining Data to \_\_\_\_.

- a) Event Basis
- b) Calendar Basis
- c) Either Event or Calendar Basis
- d) Neither Event or Calendar Basis



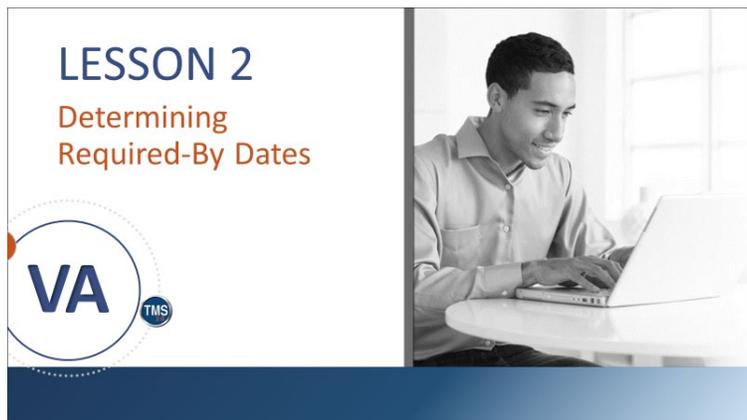
Slide 23: Questions?

### Questions?

If you have any questions about the material in Lesson 1, please ask them using the chat feature at this time.

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

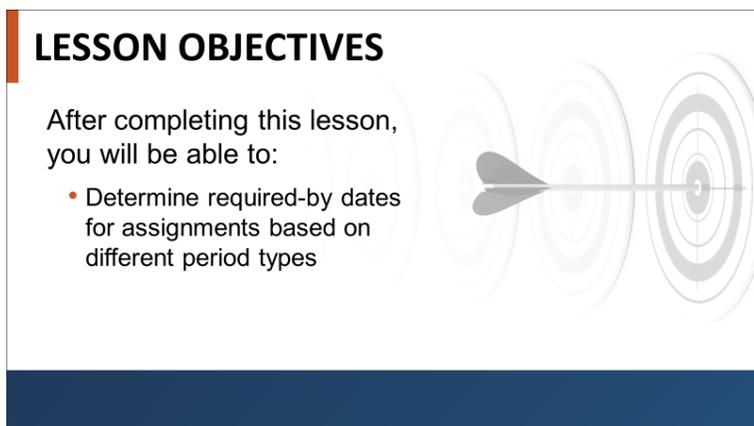
## 2.3 Lesson 2: Determining Required-By Dates



Slide 24: Lesson 2: Determining Required-By Dates

### Lesson 2: Determining Required-By Dates

Lesson 2 covers how to determine required-by dates.



Slide 25: Lesson 2 Objectives

### Lesson 2 Objectives

After completing this lesson, you will be able to:

- Determine required-by dates for assignments based on different period types

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Period Start Date

Always remember:

- The system has to complete the current period (day, week, month, quarter, or year) before it can begin counting a new one.

## Period Start Date

It is important to remember that the VA TMS has to complete the current period (day, week, month, year, quarter) before it can begin counting a new one.

Slide 26: Period Start Date

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Required Dates Practice

Assignment	Date Period	Number	Due Date
3/15/2018	Years	1	12/31/2019
3/15/2018	Days	365	03/15/2019
3/15/2018	Months	6	09/30/2018
3/15/2018	Days	183	09/15/2018
3/15/2018	Quarters	1	06/30/2018
3/15/2018	Months	3	06/30/2018
3/15/2018	Days	90	06/15/2018

Slide 27: Required Dates Practice

## Required Dates Practice

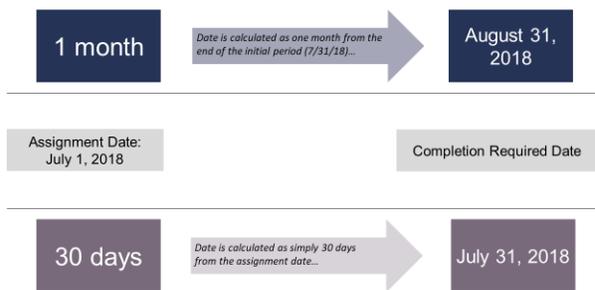
This chart shows several examples of required dates for different period types, all of which have the assignment date of March 15, 2019.

- In the first row, the period is one year, so at the end of that year (December 31, 2019), the user has one full calendar year before it is due (December 31, 2020).
- In the second row, the period is 365 days, so the due date is March 15, 2019.
- In the third row, the period is 6 months, so the due date is September 30, 2019.
- In the fourth row, the period is 183 days, so the due date is September 15, 2019.
- In the fifth row, the period is 1 quarter, so the due date is June 30, 2019.
- In the sixth row, the period is 3 months, so the due date is June 30, 2019.
- In the seventh row, the period is 90 days, so the due date is June 15, 2019.

So, TMS **always** finishes the current Period before the next begins, and the item is due.

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### Event Basis: 1 Month vs. 30 Days



Slide 28: Event Basis: 1 Month vs. 30 Days

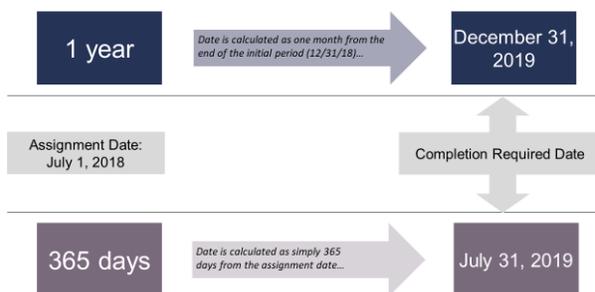
### Event Basis: 1 Month vs. 30 Days

This diagram shows the difference between 1 Month and 30 Days, which seem similar, but have two very different Completion Required dates.

If an item is assigned on July 1, 2018, with a period of one month, the user ends the current period on July 31 and then has one full month, making the item due August 31, 2018.

If the item is assigned on July 1, 2018, with a period of 30 days, the user ends the current period on July 1 and then has 30 full days, making the item due July 31, 2018.

### Event Basis: 1 Year vs. 365 Days



Slide 29: Event Basis: 1 Year vs. 365 Days

### Event Basis: 1 Year vs. 365 Days

This diagram shows the difference between 1 Year and 365 Days, which seem similar, but have two very different Completion Required dates.

If an item is assigned on July 1, 2018, with a period of one year, the user ends the current period on December 31, 2018, and then has one full year, making the item due December 31, 2019.

If the item is assigned on July 1, 2018, with a period of 365 days, the user ends the current period on July 1<sup>st</sup> and then has 365 full days, making the item due July 1, 2019.

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

- Assignment Date: **January 24, 2019**
- Number: **5**
- Period: **Months**



KNOWLEDGE CHECK

1. What is the **End Date** of the **Initial Period** (Months)?
2. What is the **Completion Required Date**?

Slide 30: Knowledge Check

### Knowledge Check

In this example, the assignment date starts on January 24, 2019, for a period of 5 months.

1. What is the end date of the initial period (Months)?
2. What is the Completion Required Date?

- Assignment Date: **January 24, 2019**
- Number: **365**
- Period: **Days**



KNOWLEDGE CHECK

1. What is the **End Date** of the **Initial Period** (Days)?
2. What is the **Completion Required Date**?

Slide 31: Knowledge Check

### Knowledge Check

In this example, the assignment date starts on January 24, 2019, for a period of 365 days.

1. What is the end date of the initial period?
2. What is the Completion Required Date?

- Assignment Date: **January 24, 2019**
- Number: **1**
- Period: **Year**



KNOWLEDGE CHECK

1. What is the **End Date** of the **Initial Period** (Years)?
2. What is the **Completion Required Date**?

Slide 32: Knowledge Check

### Knowledge Check

In this example, the assignment date starts on January 24, 2019, for a period of 1 year.

1. What is the end date of the initial period?
2. What is the Completion Required Date?

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



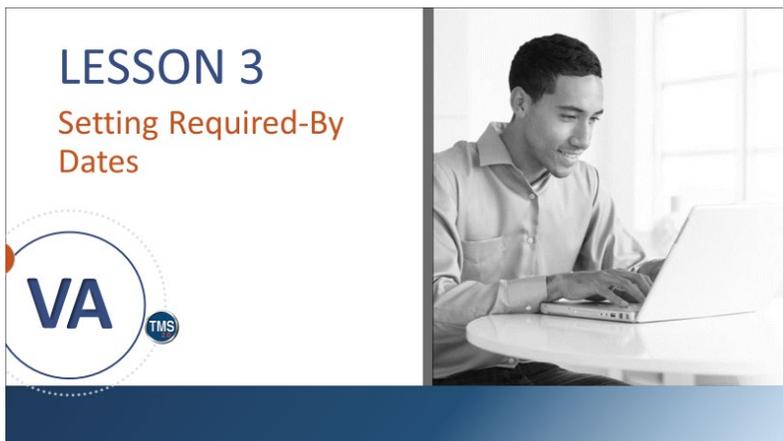
Slide 33: Questions?

### Questions?

What questions do you have about the materials covered in Lesson 2?

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

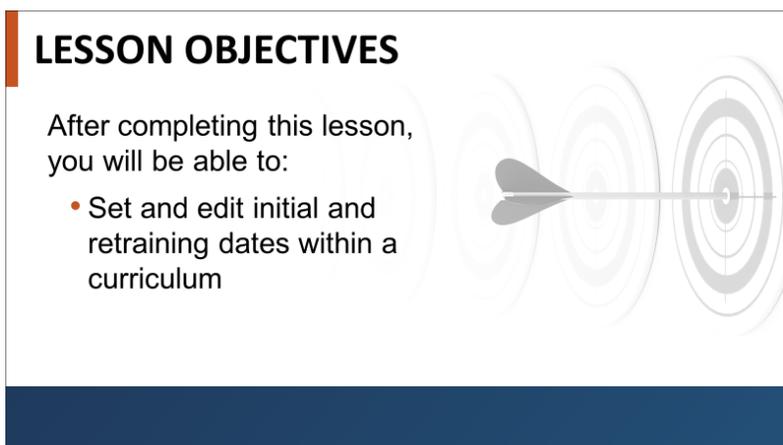
## 2.4 Lesson 3: Setting Required-By Dates



Slide 34: Lesson 3: Setting Required-By Dates

### Lesson 3: Setting Required-By Dates

Lesson 3 covers how to set required-by dates in a curriculum in the VA TMS.



Slide 35: Lesson 3 Objectives

### Lesson 3 Objectives

After completing this lesson, you will be able to:

- Set and edit initial and retraining dates within a curriculum

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Editing Initial and Retraining Dates

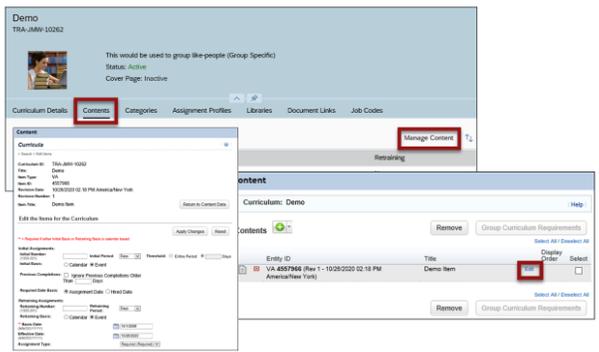
Remember **CCME**:

**C**urriculum - navigate to the Curriculum record

**C**ontents - select Contents from the Related area

**M**anage Content - click the Manage Content button

**E**dit - select the Edit link for the Item you want to set Required Dates for



Slide 36: Editing Initial and Retraining Dates

## Editing Initial and Retraining Dates

Use the following acronym to help you remember how to set and edit initial and retraining dates—CCME:

- **C**urriculum: Navigate to the Curriculum Record
- **C**ontents: Select Contents from the Related area
- **M**anage Content: Click the Manage Content button
- **E**dit: Select the small, blue Edit link for the item you want to set required dates for

## Demonstration: Setting Required-By Dates within a Curriculum

Now the instructor will demonstrate how to set required-by dates in a curriculum.



Slide 37: Demonstration: Setting Required-By Dates within a Curriculum

Notes: \_\_\_\_\_  
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 \_\_\_\_\_



### Demonstration: Setting Required-By Dates within a Curriculum

For this demonstration, you will search for a curriculum record and edit dates.

1. Navigate to **Learning Activities > Curricula**.
2. Search for and select a curriculum record in the LMS Training Domain. **NOTE:** You can look up the security domain by selecting the filter icon, or you can type **TRAIN** in the Security Domain field.
3. Select **Contents** from the Related area of the record. **NOTE:** If there are no items in the Contents tab, choose another curriculum record.
4. Select **Manage Content**.
5. Locate the item to modify and select the **Edit** link.
6. In the **Initial Assignments** section, enter an initial number (30).
7. Select **days** as initial period.
8. The **Event** radio button should already be selected for initial basis.
9. In the **Retraining Assignments** section, enter a retraining number (90).
10. Select **days** as the retraining period.
11. The **Event** radio button should already be selected for initial basis.
12. Check the box for **Ignore Previous Completions Older Than \_\_ Days**.
13. Enter **30** for the number of days. **NOTE:** This prevents users from doing the retraining assignment immediately after the initial one.
14. Select **Apply Changes**.
15. Close the Pop-up Window.

Notes: \_\_\_\_\_  
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Slide 38: Activity #1: Setting Required-By Dates within a Curriculum

### Activity #1: Setting Required-By Dates within a Curriculum

- Now you will have an opportunity to practice setting required-by dates within a curriculum.
- Complete the steps for Activity #1 in your Participant Guide.
- If you have any questions during the activity, send them to the instructor using the chat feature.

Notes: \_\_\_\_\_  
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## Activity #1: Setting Required-By Dates within a Curriculum

For this activity, you will search for a curriculum record and edit dates.

1. Navigate to **Learning Activities > Curricula**.
2. Search for and select a curriculum record in the LMS Training Domain. **NOTE:** You can look up the security domain by selecting the filter icon, or you can type **TRAIN** in the Security Domain field.
3. Select **Contents** from the Related area of the record. **NOTE:** If there are no items in the Contents tab, choose another curriculum record.
4. Select **Manage Content**.
5. Locate the item to modify and select the **Edit** link.
6. In the **Initial Assignments** section, enter an initial number (30).
7. Select **days** as initial period.
8. The **Event** radio button should already be selected for initial basis.
9. In the **Retraining Assignments** section, enter a retraining number (90).
10. Select **days** as the retraining period.
11. The **Event** radio button should already be selected for initial basis.
12. Check the box for **Ignore Previous Completions Older Than \_\_ Days**.
13. Enter **30** for the number of days. **NOTE:** This prevents users from doing the retraining assignment immediately after the initial one.
14. Select **Apply Changes**.
15. Close the Pop-up Window.

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Which of the following is impacted by the effective date of an item within a curriculum?



- a) Required-By Date
- b) Curriculum Status
- c) Both of these
- d) Neither of these

KNOWLEDGE CHECK

### Knowledge Check

Answer this question by entering your response in the chat window.

Which of the following is impacted by the effective date of an item within a curriculum?

- a) Required-By Date
- b) Curriculum Status
- c) Both of these
- d) Neither of these

Slide 39: Knowledge Check

The system always calculates Required Dates in days.



- a) True
- b) False

KNOWLEDGE CHECK

### Knowledge Check

Answer this question by entering your response in the chat window.

The system always calculates Required Dates in days.

- a) True
- b) False

Slide 40: Knowledge Check

Notes: \_\_\_\_\_  
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Slide 41: Questions?

**Questions?**

What questions do you have about the materials covered in Lesson 3?

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

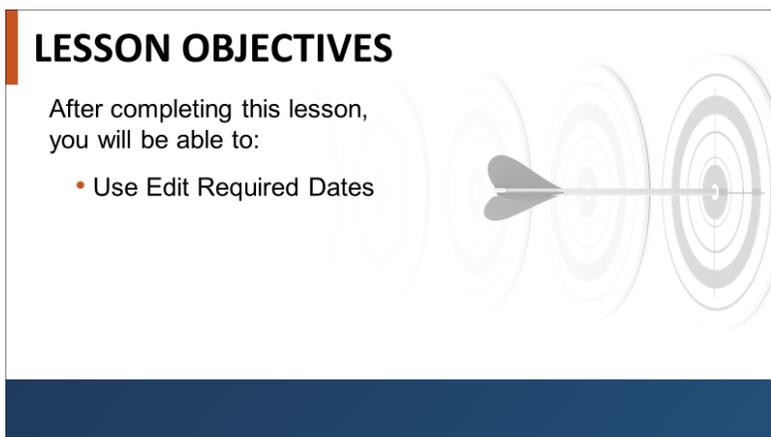
## 2.5 Lesson 4: Edit Required Dates



Slide 42: Lesson 4: Edit Required Dates

### Lesson 4: Edit Required Dates

This lesson introduces you to the Edit Required Dates tool in the VA TMS.



Slide 43: Lesson 4 Objectives

### Lesson 4 Objectives

After completing this lesson, you will be able to:

- Use Edit Required Dates

Notes: \_\_\_\_\_  
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## Edit Required Dates

Admins can change required dates directly on a user's Assigned Items. This is done when:

- A class is not available until a later date
- The class has been cancelled due to lack of resources (classrooms, instructors, etc.), making the user unable to meet the required date

Slide 44: Edit Required Dates

## Edit Required Dates

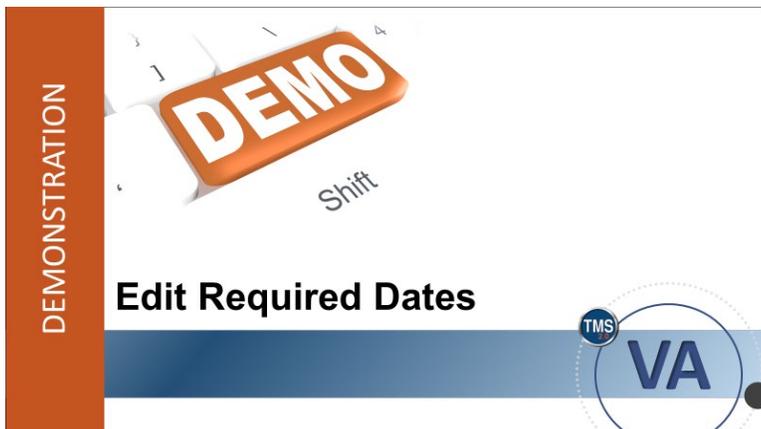
Admins can change required dates directly on the user's Assigned Items. This is not practical if you need to update a large number of learning records.

Edit Required Dates is a tool used to change the required date of one or more items assigned to one or more users. This is used when:

- A class is not available until a later date
- The class has been cancelled due to lack of resources (classrooms, instructors, etc.), making the user unable to meet the required date

## Demonstration: Edit Required Dates

Now the instructor will demonstrate how to use Edit Required Dates.



Slide 45: Demonstration: Edit Required Dates

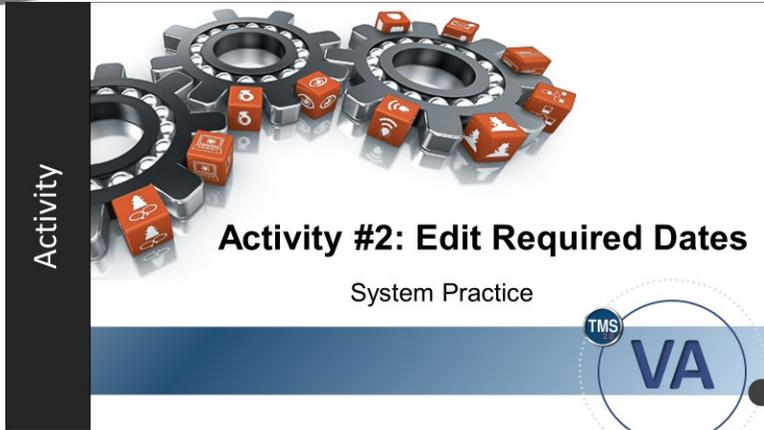
Notes: \_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_



### Demonstration: Edit Required Dates

1. Navigate to **Manage User Learning > Edit Required Dates**.
2. Select the **add one or more from list** link to add users.
3. Enter **DMLMU** in the User ID field.
4. Select **Search**.
5. Check the box in the **Add column** next to each user who needs a required date change.
6. Select **Add**.
7. Select **Next** to move on to Step 2.
8. Select the **add one or more from list** link to search for curricula.
9. Enter **TRAIN** in the Security Domain field. **NOTE:** If Security Domain is not an option, select Add/Remove Criteria, check the box for Security Domain, then click Select.
10. Select **Search**.
11. Check the box in the **Add column** next to a curriculum.
12. Select **Add**.
13. Select **Next** to move on to Step 3.
14. Select **VA** for Item Type.
15. Enter **3730302** in the Item ID field.
16. Select **Add**.
17. Select **Next** to move on to Step 4.
18. Enter a new required date for each item listed by selecting the **calendar icon**.
19. Select **Schedule Job**.
20. Select the **Run this job immediately, if allowable** radio button.
21. Uncheck the **Notify via email upon completion** in the Train environment.
22. Select **Finish**.

Notes: \_\_\_\_\_  
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\_\_\_\_\_



Slide 46: Activity #2: Edit Required Dates

### Activity #2: Edit Required Dates

- Now you will have an opportunity to use Edit Required Dates.
- Complete the steps for Activity #2 in your Participant Guide.
- If you have any questions during the activity, send them to the instructor using the chat feature.

Notes: \_\_\_\_\_  
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## Activity #2: Edit Required Dates

1. Navigate to **Manage User Learning > Edit Required Dates**.
2. Select the **add one or more from list** link to add users.
3. Enter **DMLMU** in the User ID field.
4. Select **Search**.
5. Check the box in the **Add column** next to each user who needs a required date change.
6. Select **Add**.
7. Select **Next** to move on to Step 2.
8. Select the **add one or more from list** link to search for curricula to add.
9. Enter **TRAIN** in the Security Domain field. **NOTE:** If Security Domain is not an option, select Add/Remove Criteria, check the box for Security Domain, then click Select.
10. Select **Search**.
11. Check the box in the **Add column** next to a curriculum.
12. Select **Add**.
13. Select **Next** to move on to Step 3.
14. Select **VA** for Item Type.
15. Enter **3730302** in the Item ID field.
16. Select **Add**.
17. Select **Next** to move on to Step 4.
18. Enter a new required date for each item listed by selecting the **calendar icon**.
19. Select **Schedule Job**.
20. Select the **Run this job immediately, if allowable** radio button.
21. Uncheck the **Notify via email upon completion** in the Train environment.
22. Select **Finish**.

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Where is Edit Required Dates located in TMS?



KNOWLEDGE CHECK

- a) Content > Edit Required Dates
- b) Manage User Learning > Edit Required Dates
- c) Learning Activities > Edit Required Dates
- d) None of the above

Slide 47: Knowledge Check

### Knowledge Check

Answer this question by entering your response in the chat window.

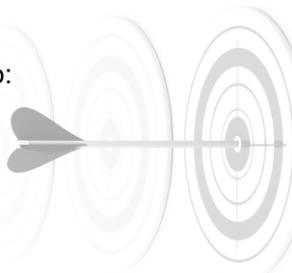
Where is Edit Required Dates located in TMS?

- a) Content > Edit Required Dates
- b) Manage User Learning > Edit Required Dates
- c) Learning Activities > Edit Required Dates
- d) None of the above

### SESSION SUMMARY

In this session, you learned how to:

- Determine initial and retraining dates
- Set required dates within an item
- Use Edit Required Dates



Slide 48: Session Summary

### Session Summary

To recap: In this session, you learned how to:

- Determine initial and retraining dates
- Set required dates within an item
- Use Edit Required Dates

Notes: \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_



Slide 49: Questions?

### Questions?

If you have any questions regarding today’s training, please submit them through the chat window.

### Additional Resources

- TMS Resource Site: <https://www.hcsc.va.gov/>
  - Job Aids
  - Participant Guides for each session
- TMS Administrators Community of Practice (COP)
  - For more information: [VATMSCoP@va.gov](mailto:VATMSCoP@va.gov)
- Help Desk
  - 1-855-673-4357
- Dr. Bashshar: [Clarence.Bashshar@va.gov](mailto:Clarence.Bashshar@va.gov)

Slide 50: Additional Resources

### Additional Resources

There are additional resources available to assist you with your duties as an administrator. They are:

- The TMS Resources site has copies of job aids, tutorials, and participant guides for all TMS 2.0 training sessions: <https://www.hcsc.va.gov/>
- Those same materials can also be found on the TMS Community of Practice. Use the email address to request access: [VATMSCoP@va.gov](mailto:VATMSCoP@va.gov)
- Additional assistance can be requested by contacting the VA Enterprise Service Desk at **1-855-673-4357**
- **[Clarence.Bashshar@va.gov](mailto:Clarence.Bashshar@va.gov)**

Notes: \_\_\_\_\_  
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