CMDS Validator Package

This package will cover:

Logging into CMDS
Your Home Page
Self-Assessment
Your Training Plan
E-Learning
Validating
Applying for Certification

http://www.keyeracmds.com

Logging into CMDS

Go to http://www.keyeracmds.com/ and click "**Sign In"** (top right corner)

Enter your email address and password.

Click "CONTINUE".

NOTE:

- You must use the email address that matches the one used in CMDS
- If this is your first time signing in, or you have reset your password, your password will be cmds246. You will be prompted to change your password (cmds246 is your old password).
- If you forget your password, click "Reset my password".

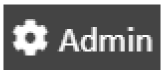
Home Page – From Top to Bottom

Top Navigation Bar

- Click here to navigate to your home page at any time

- Click the tenant menu bar to access your profiles, self-assessments, and tenant resources

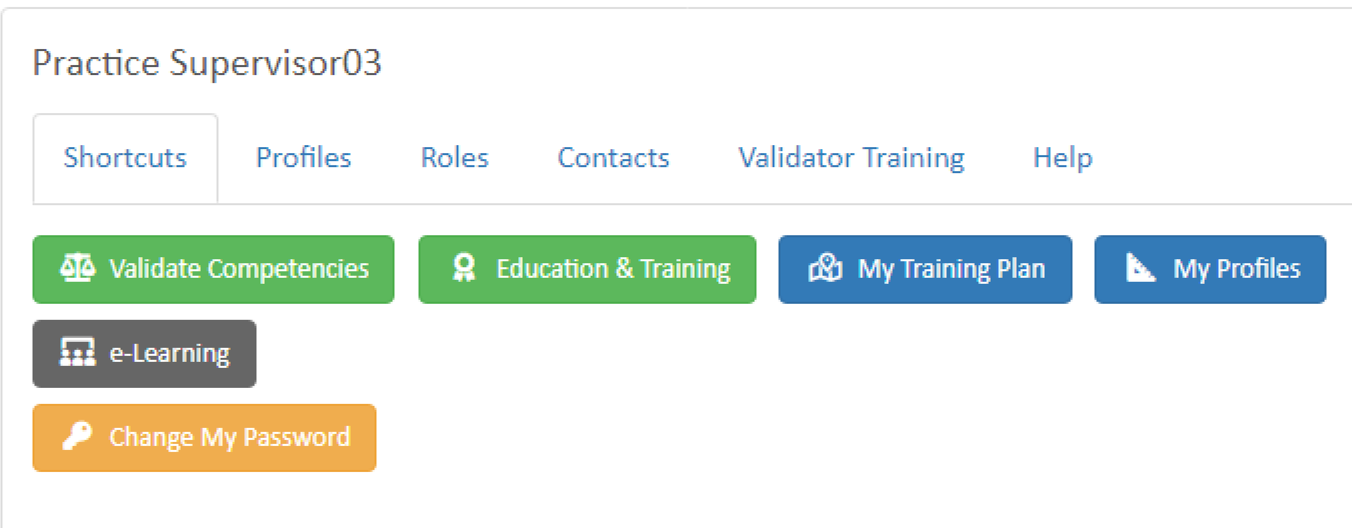
- Click “Reports” to run tenant reports



- Click “Admin” to access admin tools like People search, email notifications, and bulk assign training.

User Name Box

- Name as it appears in the system is shown
- 6 tabs are available – **Shortcuts, Profiles, Roles, Contacts, Validator Training, and Help**
- Shortcuts tab is highlighted and several shortcut tools are available for users to quickly access the most commonly used tools in CMDS (e.g. My Training Plan).



- Users can view the information under each of the 6 tabs by clicking on the tab name (e.g. PROFILES).
- The “**Contacts”** tab contains a list of your manager(s), supervisor(s), and validator(s). If you are a manager, supervisor, and/or validator you will also see a list of the individuals you manage, supervise, and/or validate.
- If you are a Manager and have people assigned to you then you will see them listed under “Workers”.
- Managers can click on the house icon next to the user’s name and be directed to the users’ home page to see where the user currently stands in their training.
- If you are a Validator you will see the people assigned to you listed under “Students”.

Profile(s) Required for Compliance box

- Toggle between “**primary profile only**” and “**all profiles requiring compliance**” by clicking the radio button.
- When “**primary profile only**” is selected the name of your primary profile will display, and the competency totals in the compliance summary will reflect your **primary profile only.**

- When "**all profiles requiring compliance**" is selected, the competency totals in the compliance summary will reflect **all profiles** requiring compliance.
- The "Compliance Summary" breaks down each compliance category, showing your percent complete in each area; to view the assigned items, click on the colored text to the right (e.g. **12 out of 13 completed**)
- The "Training Summary" box shows any additional training that you have been assigned; to view the assigned items, click on the colored text to the right.

PROFILE(S) REQUIRED FOR COMPLIANCE

◉ Primary profile only ○ All profiles requiring compliance

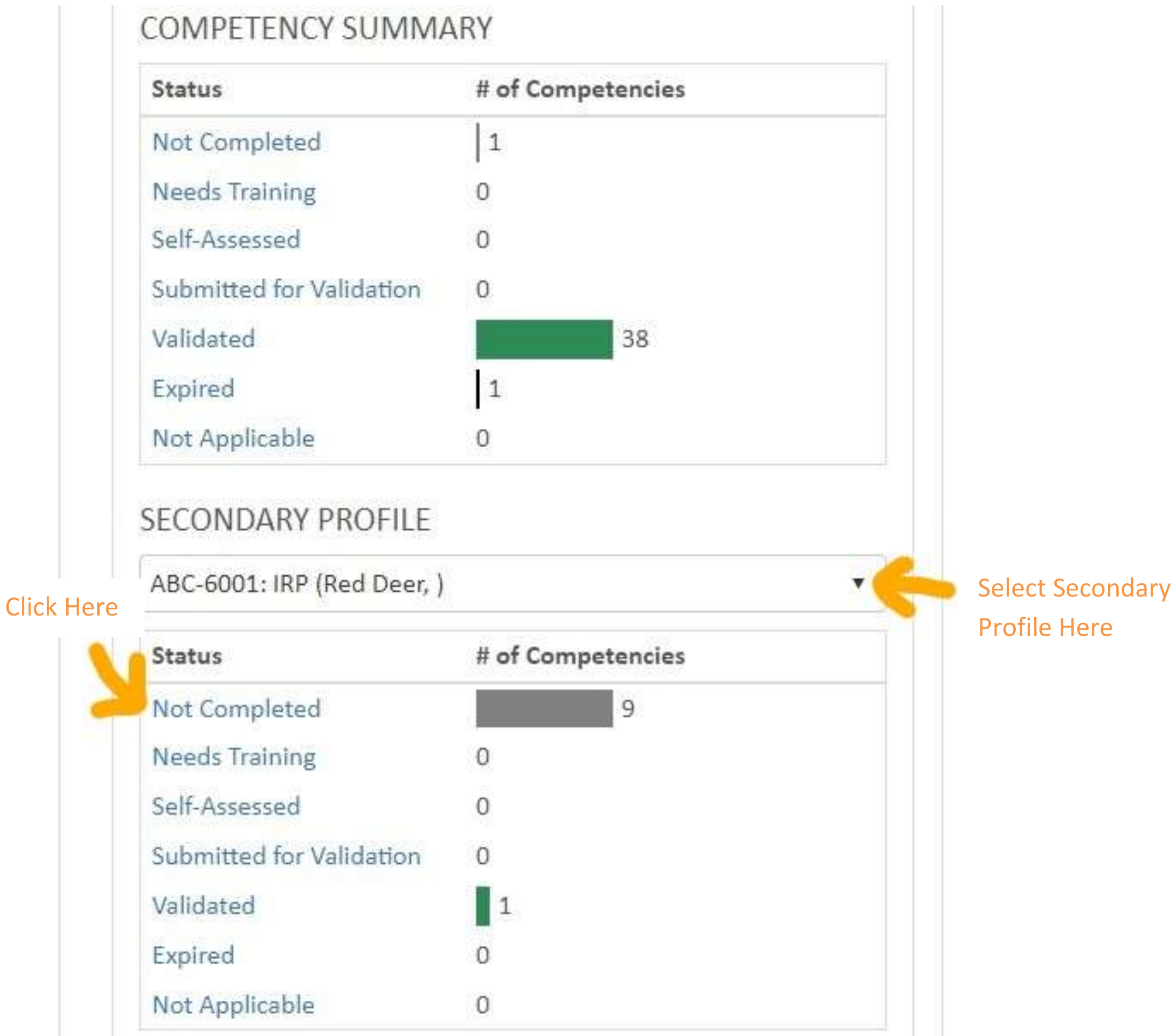
ABC 0001: CMDS Training

Compliance Summary

	Time-Sensitive Safety Certificates	100.0%	0 out of 0 completed
	Additional Compliance Requirements	100.0%	0 out of 0 completed
	Critical Competencies	0.0%	0 out of 11 validated
	Non-Critical Competencies	39.3%	11 out of 28 validated
	Codes of Practice	0.0%	0 out of 5 signed off
	Safe Operating Practices	0.0%	0 out of 15 signed off

Competency Summary box

- Shows a bar graph breakdown of your Profiles
- Click on the status (e.g. **Expired**) to access the competencies
- To view a bar graph on your secondary profiles, select the profile from the drop down



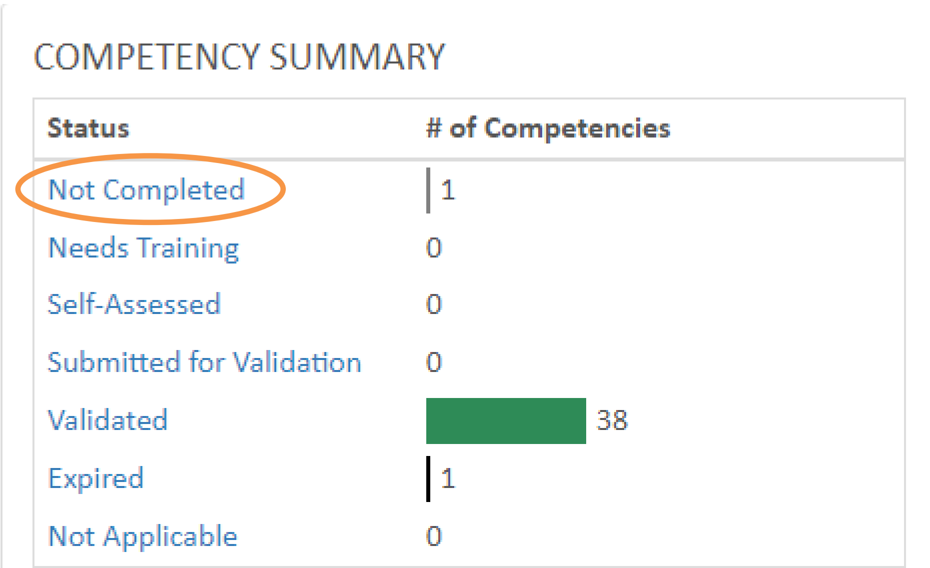
Definitions:

- **Primary Profile (Required for Compliance):** The job profile that best matches the job you are performing the majority of the time.
- **Secondary Profiles (Required for Compliance):** Job profiles that contain a mandatory skill set for supporting or additional functions required for your job.
- **Secondary Profiles (Not Required for Compliance):** Job profiles not required to safely and effectively complete your current job role (often roles you are training in).

There are a variety of ways to access to your competencies to perform your self-assessments.

Method #1: Using your competency summary bar graph

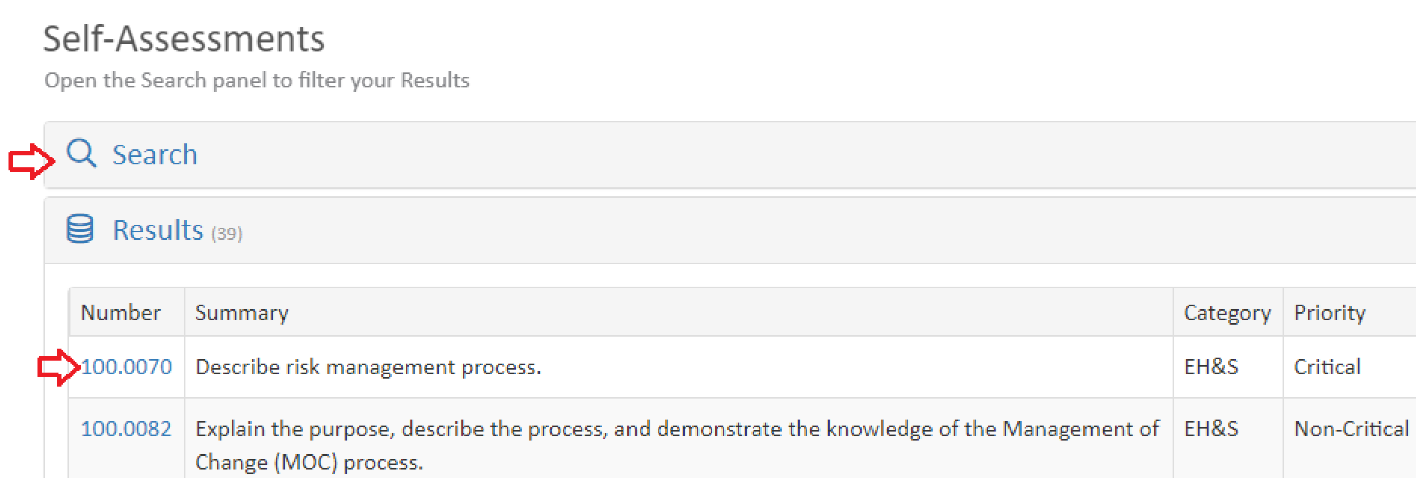
- From your home page, to access your Not Complete competencies in your primary profile, click **Not Completed** in the Competency Summary bar graph



- From your home page, to access your Expired competencies in your primary profile, click **Expired** in your Competency Summary bar graph
- To generate a bar graph on any of your secondary profiles use the drop down under "SECONDARY PROFILE"

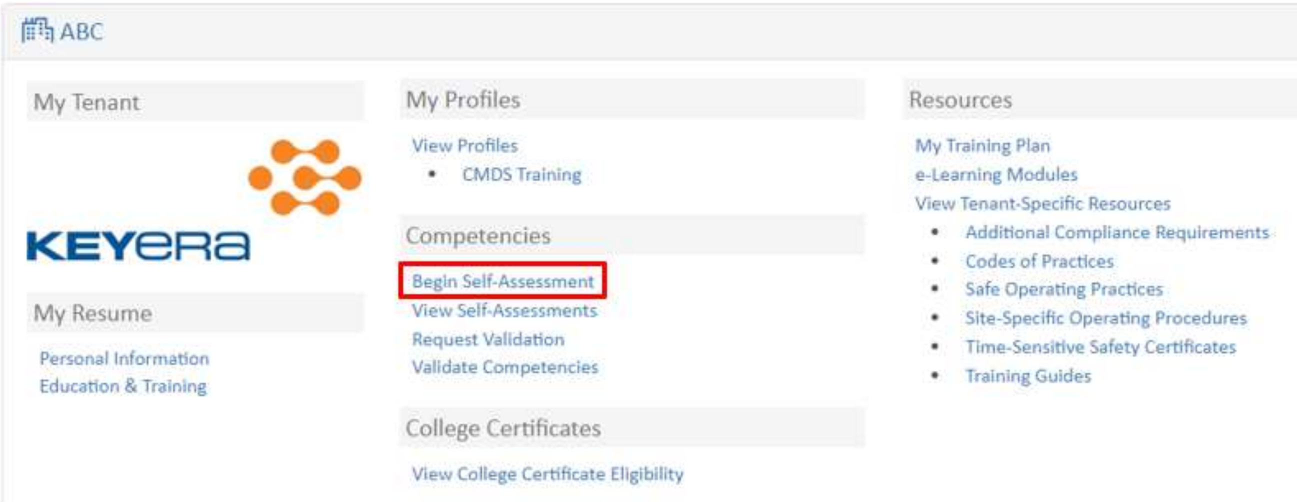
Method #2: From your profile(s)

- From your home page, under the Shortcuts tab, click the "**MY PROFILES**" shortcut.
- Click on the Profile name that you would like to self-assess on.
- Click on the **competency number** for which you would like to self-assess.
  - Note: you can use the "**Search**" to locate specific competencies



Method #3: From your tenant drop down

- Click your tenant's name, top right of the screen.
- Under Competencies click "Begin Self-Assessment".

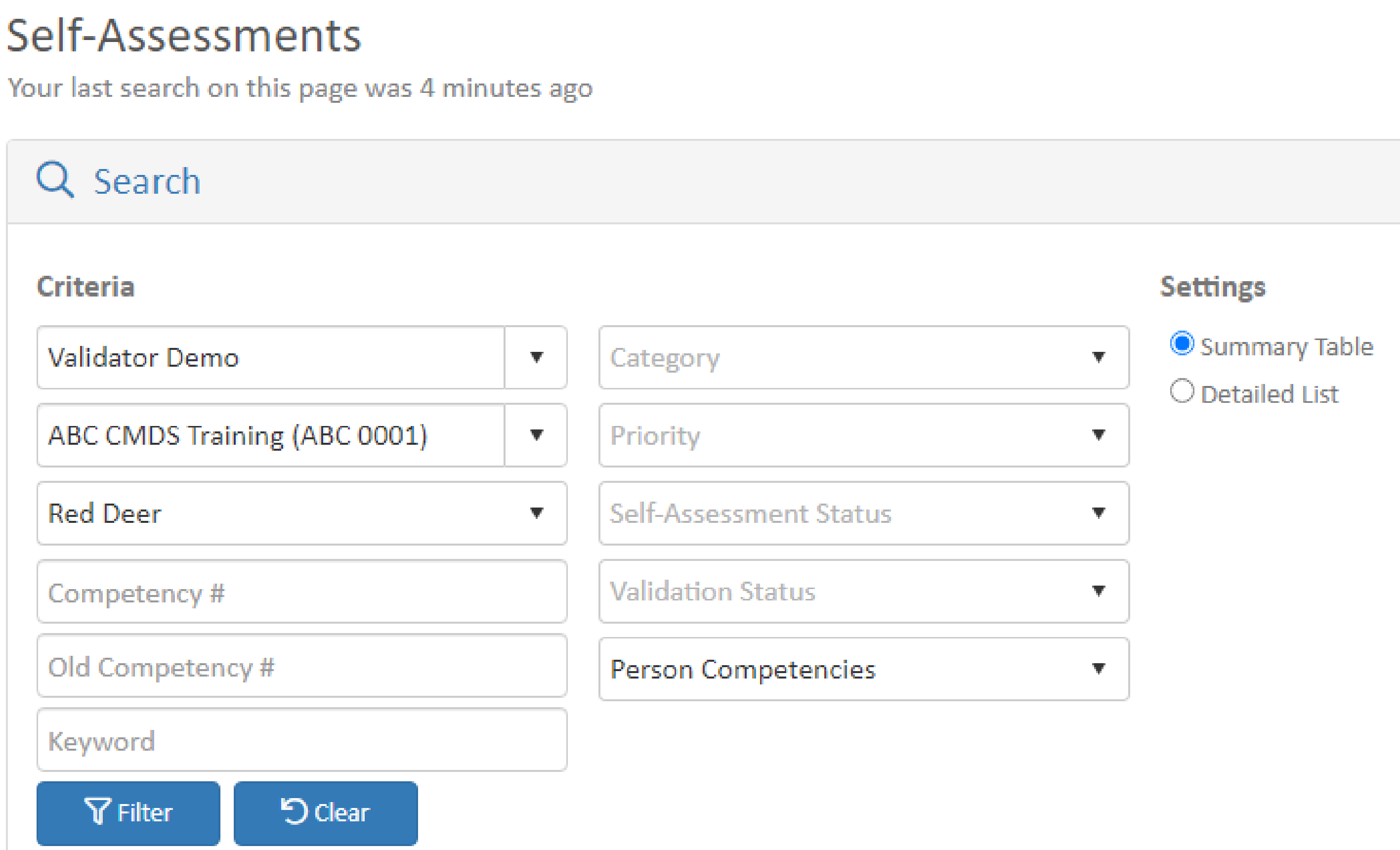


Completing your self-assessment:

- Using any of the above methods, once you are viewing the competency for which you would like to self-assess on, review attached Resources and Downloads, review the knowledge and skills, then complete your self-assessment
- Click "**NEXT"** to be taken to the next competency. This saves your response. You do not have to click "Submit for Validation" after every self-assessment.
- Once you have completed several self-assessments, and are ready to notify your validator, click "**Submit for Validation"**. This sends an email notification to your validator informing them that you are ready to be checked out on your submissions.

Locating Specific Competencies for Self-Assessment

- When using both **method #1** and **method #2** above you can isolate a specific competency number, search for key words, isolate critical competencies, and/or search for expired competencies.
- Once you locate the competency you are interested in, follow the same self-assessment process as above.



Submitting Your Competencies for Validation

Once you have completed a number of self-assessments, and would like to notify your validator that you are ready to be validated on yourself assessments:

- Go to **your tenant's name,** top navigation bar
- Under Competencies click "**Request Validation**"
- You will see a list of all your self-assessed competencies that are ready for validation, click "**Submit for Validation"**, top right. This will send an email to your assigned validator informing them that you are ready to be validated on the competencies listed.
    - NOTE: Your validator will only be able to validate you if they themselves are validated in that competency
    - You can verify who your assigned validator(s) are by going to your home page, clicking on the "**Contacts"** tab, and looking for your listed Validator(s). If no one is listed, contact your manager, administrator, or account manager.

Reviewing and Signing Off on Items Assigned to Your Training Plan

- If you have been **assigned** a document for review, an e-Learning module for completion, or a safety certificate that is required, you will see this reflected on your home page.

Option #1:

- To view what you have been assigned for completion, click “MY TRAINING PLAN” under the shortcuts tab.
- Display will default to show **ONLY items NOT COMPLETE**.
    - To see BOTH complete and incomplete training **click** the box next to *“*Show all of the resources in my training plan. By default, this screen shows only incomplete training; check this box to show completed training also.*”*

Option #2:

- Using the Compliance Summary click on the percent complete in each area, to view the assigned items, click on the colored text to the right (e.g. **12 out of 13 completed**)

PROFILE(S) REQUIRED FOR COMPLIANCE

◉ Primary profile only ○ All profiles requiring compliance

ABC 0001: CMDS Training

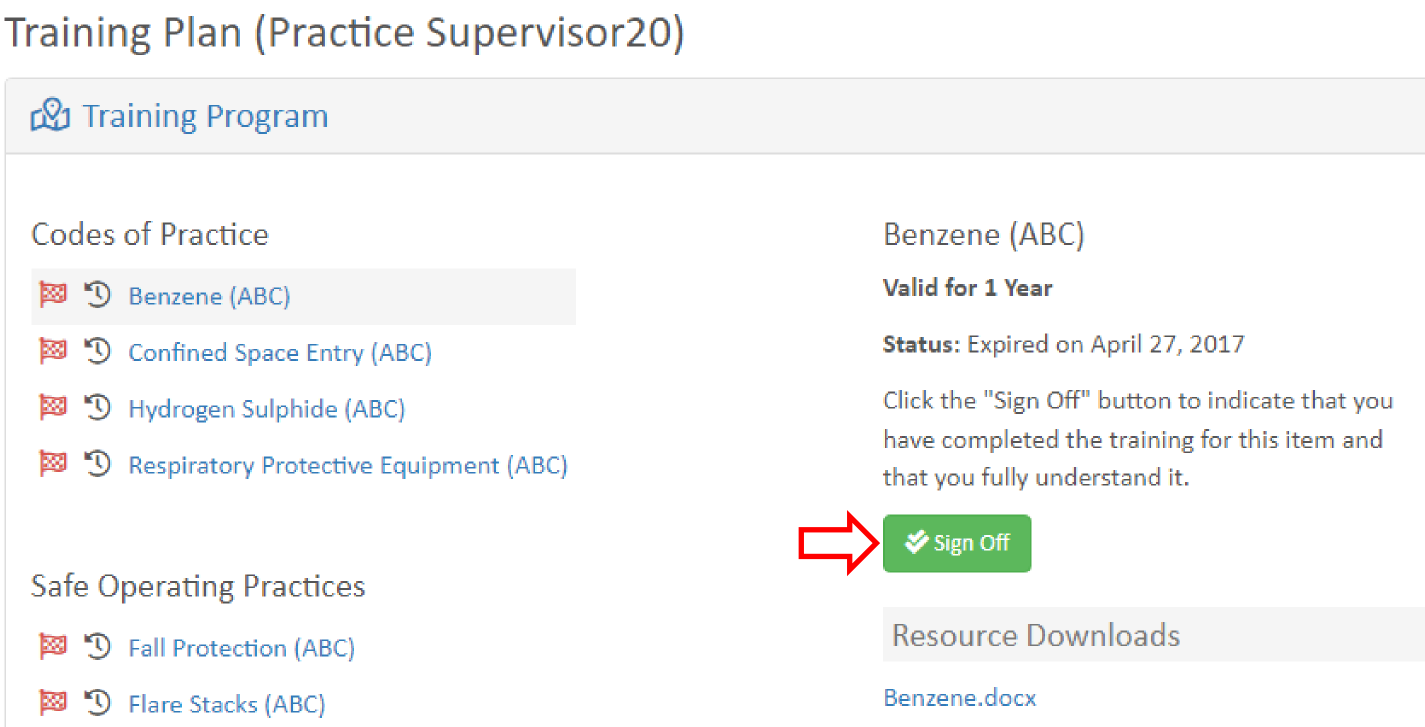
Compliance Summary

Time-Sensitive Safety Certificates	0.0%	0 out of 1 completed
Additional Compliance Requirements	100.0%	0 out of 0 completed
Critical Competencies	100.0%	11 out of 11 validated
Non-Critical Competencies	93.1%	27 out of 29 validated
Codes of Practice	0.0%	0 out of 4 signed off
Safe Operating Practices	0.0%	0 out of 15 signed off
Human Resources Documents		

For Codes of Practice, Safe Operating Practices, Additional Compliance Requirements, Site-Specific Documents, and Training Guides;

- To view what you have been assigned for completion, click “MY TRAINING PLAN” under the shortcuts tab. OR using the “Compliance Summary” click on the hyperlinked percent complete in each area (e.g. **12 out of 13 completed**)
- For any of the categories listed above you are required to **READ/REVIEW** and **SIGN OFF** that you **understand** the content
- **Click** on the document you would like to sign off on
- **Open the document**, under Resource Downloads, read/review its content

- **Click "Sign Off"**



For Assigned E-Learning;

- To view what you have been assigned for completion, click "MY TRAINING PLAN" under the shortcuts tab. OR using the "Compliance Summary" click on the hyperlinked percent complete in each area (e.g. **12 out of 13 completed**)
- **Click** on the eLearning module title to open/complete the module
  - You must complete the associated quiz with a grade of **90% or higher**

For Time-Sensitive Safety Certificates;

- Your organization may choose to **track your required safety tickets** in CMDS
- If your required/assigned TSSC is **expired or not complete** it will show in your "Training Plan"
- You **cannot** remove this item or mark it as complete. **You must contact your local administrator and show proof of completion.**

Further information

- **Clock icons** mean there is a time clock on that resource. Once you sign off on that resource it will expire at a set interval from the sign off date (e.g. 1 year) at that time you will have to re-review the resource.
- **Red flags** mean you have not yet signed off on that item.
- **Green flags** mean you have completed reviewing the resource and signed off.

- Access "e-Learning" from the "SHORTCUTS" tab on the home page OR from the tenant menu under "Resources".
- Modules are categorized based on subject matter.
- Click on the lesson.
- The lesson will then display – **Note modules can contain multiple lessons, and multiple quizzes**.
- You can then **review the lesson** content by clicking "Start" and **Take the Quiz by clicking "Start Quiz"**
    - Note – Quizzes contain at least 10 questions and a grade of 90% or higher is required to pass.
- Complete the quiz, answering **every question**, and **click "Complete"**.

- Your quiz results are then displayed. You are given the option to attempt the quiz again by **clicking "retry this assessment"** located on the right side of the screen**.**
    - You will **not** be given the same quiz twice
    - Generally, you are allowed **3 attempts**, and then the system will lock you out of the quiz for 24 hours.
- **Viewing the quiz counts as an attempt**

- A passing mark will generate a certificate for your records.
- To return to the module click "**Course Outline"**
- To return to the list of available modules click "**Course Catalog"** located on the left side of the screen

- From the list of available eLearning modules, you can <u>search</u> for a specific module using the **Search** bar
- Type in the search bar and click the filter button
- Once you have searched for something you **MUST** <u>clear</u> your search criteria to obtain the full list of available modules again
- To do so, go back to **Search**, DELETE the keyword, and press ENTER, or press the circle arrow and press ENTER.

Please NOTE:

- If a module contains multiple lessons, with more than one quiz, an average grade of 90%+ must be achieved to pass.
- CMDS records your **most recent grade**, not necessarily your highest mark.
- Modules are organized by category; the same module may appear in more than one category.
- For a record of completed eLearning, see your "**Education and Training" in CMDS**.
- There is **no fee per module** and users can "enroll" in as many modules as they would like.
- You **do not** have to attempt the quiz
- We have done our best to make all videos and images viewable to all users. If a file is not loading, please try accessing eLearning on an alternate browser.

Validating Competencies

From your Home Page

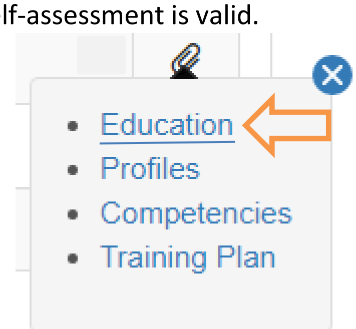
- Under the shortcuts tab, click "**VALIDATE COMPETENCIES"**
- *OR* click **your tenant** (top right), under competencies click "**Validate Competencies"**.
- You will see a list of the individuals for who you are the validator and who have submitted competencies for validation.
    - NOTE: if someone is missing from this list, they may not have submitted their competencies for validation OR you may not be validated in the competencies that they have submitted.
    - To confirm who your students are (individuals for which you are the validator), from your home page, click the "**CONTACTS"** tab and you will see your students listed.
- Click on the person's name that you would like to validate
- Click on the competency you would like to validate them on
- Scroll down and indicate whether or not you agree with the person's self-assessment.
- You will then have to give a reason for your validation, you can select a canned comment from the list, or type your own (or both).
- Click "**NEXT"** to move to the next competency submitted for validation.

Bulk Validating

- Click "**Admin"**
- Under Bulk Update Tools click "**Bulk Validate Competencies"**.
- Use the Person dropdown to find the person you would like to validate (to filter the list start to type the first name of the person you are looking for until they display).
- Use the Profile dropdown to find the profile you would like to validate them in.
- Select the self-assessment status.
- You can then check the box next to the competencies you would like to apply the validation to, or "**SELECT ALL"**.
- Select "**YES"** or "**NO"** to indicate whether you agree with the self-assessments and give a <u>reason</u> for your validation.
    - NOTE: this validation, including your comments, will be applied to <u>all</u> the competencies you have selected.
- Click "**SAVE"** (top right).

Things to Remember

- You can only validate in competencies that you yourself are validated in.
- When you disagree with a person's 'Yes' self-assessment CMDS automatically assigns "Needs Training" to the competency.
- During the validation you are verifying that the person is competent, and their self-assessment is valid.
- During the validation you may want to check the individual's "**Education & Training"** to see if they have completed their assigned sign offs, eLearning, and are up-to-date on all their Safety Certificates.
- To view a person's "**Education & Training"** click "**Admin"**, click "**People"**, under search criteria type in the person's first name, click "**Search"**. Click the paper clip to the right of the person's name, click "**Education"**.

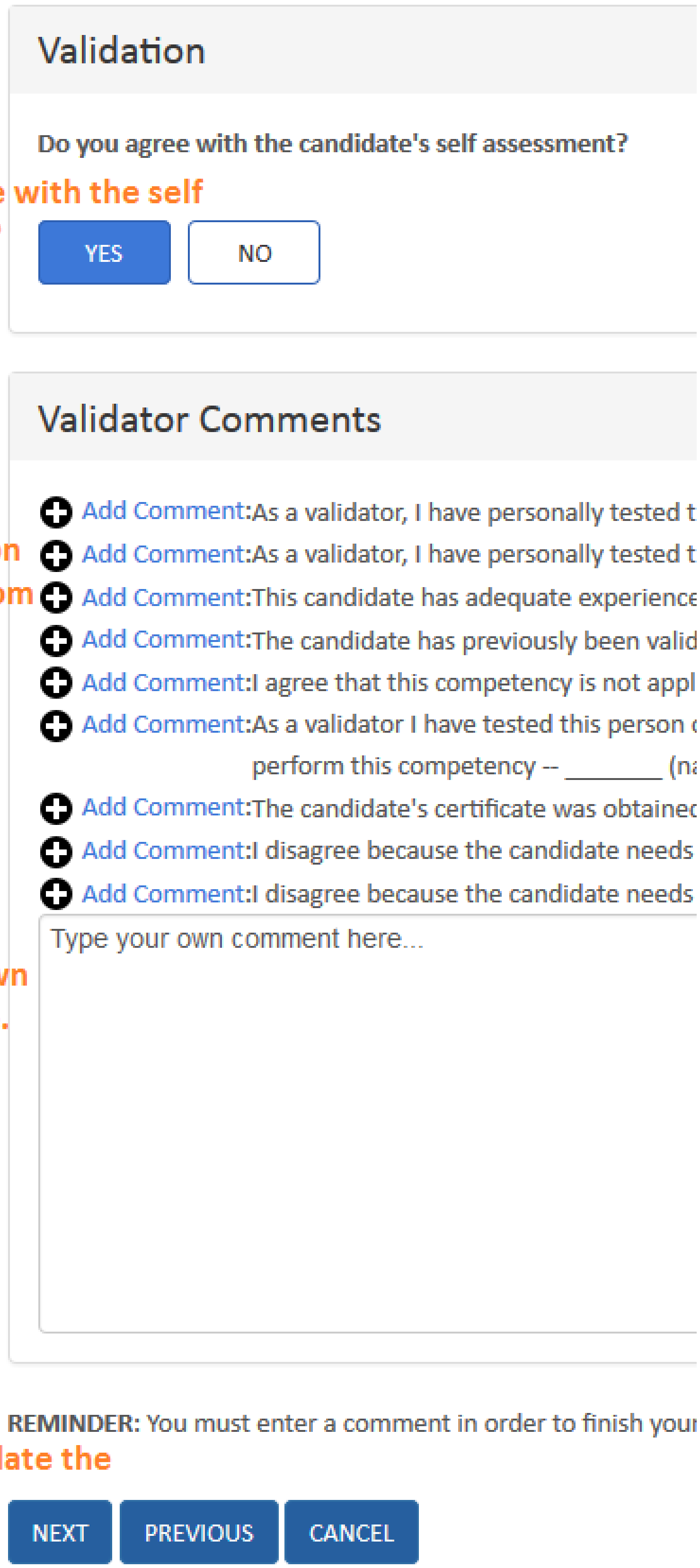


Do you agree with the self assessment?

Add your reason by selecting from the canned comments...

Or add your own comment here.

Click NEXT to validate the next competency



Applying for College Certification

VIEW YOUR ELIGIBILITY:

- **Click on** your tenant, top navigation bar.
- Under College Certificates, click "View College Certificate Eligibility".
- Available College certificates are listed; if you are eligible to apply, green flags will show on the left of the screen.
- If you are not yet eligible, a red engine warning icon will show
- If **nothing is displayed** in the "View College Certificate Eligibility" screen then it is possible your assigned profiles do not meet college requirements, contact your account manager to discuss further.

APPLYING:

- To apply for a certificate, select the radio button next to the institution for which you would like to receive certification from (e.g. Lakeland College).

Click "Send Request".

- By clicking Send Request, you **automatically notify** Keyera CMDS Admin, and the required paperwork will be emailed to you shortly. There is <u>no</u> need for you to contact the college.
- Once you receive the required paperwork, please **FULLY** complete the forms, and send them back to Keyera. We will make sure your application is received by the college.

ASSESSING YOUR QUALIFICATIONS:

- If you do not currently qualify for the certificate that corresponds to your experience/area of expertise in you can **Click** "View missing Competencies".
- Competencies showing "Not Complete" can be completed by accessing your assigned profiles.
- Competencies showing "Not Assigned" have not been assigned to you via any of your profiles. Please contact your account manager to discuss competency assignment.

Additional Information

- If you require help or have a question you can:
  - Contact your local admin
  - Contact your account manager
  - Submit a help request from the **Help** drop down in CMDS
  - Email admin_cmds@keyera.com

- If you are interested in registering for the Validator Course go to http://www.keyeracmds.com click "**VALIDATOR TRAINING"** on your home page, click on the upcoming session you would like to attend. You will be contacted with the course details within 2 working days of submitting your registration.
  - Please note: you must be finished your self-assessments prior to attending the Validator Course.

- Check out the CMDS Blog for up-to-date CMDS information http://www.keyeracmds.com/blog SUBSCRIBE to stay in the loop!