STATE CIVIL SERVICE

CPTP Training Coordinator Outline:

A Guide for Monitoring Training Requirements

As the CPTP Training Coordinator, you serve as a two-way communicator. You are responsible for getting information about the training program to the appropriate people in your department/agency/unit and passing information back to CPTP about your staff's specific training needs. You probably also have been tasked with monitoring the State Civil Service (SCS) mandatory training requirements and possibly other required training such as legislatively-mandated, or agency-specific, or license-related. This document is a guide to setting up a work process to monitor the training requirements; it is not a requirement. Many of your process decisions may depend on the size of the group you monitor.

The information following assumes you already have the Training Coordinator tab in LEO and have attended the LaGov LSO Training Coordinator course. If you have not, you can find the information on obtaining the Training Coordinator tab on the CPTP website here if you are a LaGov agency or here if you are a Non-LaGov agency.

To register for the LaGov LSO training in LEO, on your My Training page do a search for LaGov LSO and select the course title. You probably will have to prebook the course and wait for the LEO team to schedule a class date.

In the meantime, be sure you have notified the CPTP office that you will be a Training Coordinator, either permanently or temporarily. We will add you to our email lists so you will receive notifications, updates, class schedules, recruiting notices, etc. We also do a monthly webinar, generally the first Tuesday of each month at 1:00 p.m. You can sign up for those as well. You can reach us at our main contact points: CPTPLSO.Coordinator@la.gov and 225-342-8539.

In setting up our procedures, we found two critical steps that should be addressed immediately. If you do these first, you will avoid many of the problems we encountered along the way.

The first step is to create a master checklist spreadsheet. This spreadsheet will be used to track staff's training progress. Your spreadsheet will change as employees are hired and leave. To get started with this document, you will need a list of all the trainings you have to monitor. The beauty of the spreadsheet is that you can add to it and remove from it as things change.

The second critical piece is finding out who at your department/agency/unit is designated to be notified of incomplete/past-due required training. This will be covered more in section #2.

This outline also has information on creating an orientation procedure. Furthermore, it will help you streamline your process by suggesting and demonstrating task reminders (TR) and drafts of correspondence which will be used repeatedly. Please consider the timing of your task reminders. About mid-way through our process, we realized we inadvertently might be setting the task reminders in clumps. We began a list of all our reminder dates and added in other duties with due dates that might overlap. That allowed us to, with foresight, set the dates for each task, distributing the workload more evenly. I highly recommend you do the same. Finally, the outline addresses recruiting and advertising CPTP classes and other relevant training information.

Take this outline and make it yours. If you find shortcuts or improvements, please let us know so we can share those during our webinars.

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1. MASTER CHECKLIST CREATION

a. In LEO, run Employee Qualification report (Qual report) (ZP174), entering any one Qualification (qual) such as CPTP Supv Group 1 Program. Select the Report Option: All EEs. This will give you a list with every employee under your personnel area.
b. Export to a spreadsheet; title spreadsheet TC Master Checklist (or something similar).
    i. Keep these columns: Personnel #, First & Last names, Supv Group, Qualification Text, Start Date, Additional Comments (has info such as Grandfathered - and that's important!).
    ii. Eliminate unnecessary columns such as PA #, PA text, Org Unit Text & Job Title (unless you have a need for these to distinguish groups), Qualification ID, Expires on, Proficiency, Qualification Comment (not Qualification Text), Cert Pernr, Document N, and Provider.
    iii. Change these column headings:
        1. Qualification Text to "Title" Due (whichever qual you ran the report on; for example, Group 1 Due).
        2. Start date to "Title" Done (for example, Group 1 Done).
    iv. Add columns listed below. For several, there will be two columns per item - one for due date and one for completion:
        1. Hire date (new people you will add later) Put this column before Supv Group.
        2. 2012 Grp 1 Due & Grp 1 Done (Start with this one if you didn't use it as your search qual.) *(These 2012 columns will be at the end of your report. See d below.)*
        3. 2012 Grp 2 Due & Grp 2 Done
        4. 2012 Grp 3 Due & Grp 3 Done
        5. 2015 CORE Due & 2015 CORE Done
        6. 2015 Grp 1 Due & 2015 Grp 1 Done
        7. 2015 Grp 2 Due & 2015 Grp 2 Done
        8. 2015 Grp 3 Due & 2015 Grp 3 Done
        9. 2015 CE (Continuing Education)
        10. PES Due & PES Done
        11. PSH (Preventing Sexual Harassment)
        12. Ethics (Code of Ethics for Public Servants)
        13. ORM Defensive Driving (if you monitor this)
        14. ORM Blood Borne Pathogens (if you monitor this)
        15. Any additional department/agency-specific mandatory trainings
            a. Example: SCS-internal additional requirements for all staff:
                i. Two additional Continuing Education courses during FY 14-15 (CE1 & CE2)
    v. Run the Qual report again. This time run for every qual for which you have a column; select the Report Option: Only EEs with a Qual Record; send to a new spreadsheet & eliminate any unnecessary columns (keep the Additional Comments).

NOTE: July 2015 enhancements to the Qual report allow you to pull multiple qualifications when using the All EEs option. This could speed up the process above tremendously.

*****Please be aware that the Qual comments do not show the notes now. You must select the "Check for comments" box under the Report Options.

c. Using info from the Qual report just run, add to your TC Master Checklist the completion dates for every current mandatory training you have to monitor, such as CPTP Supv Group 1 Program, CPTP Supv Group 2 Program, CPTP Supv Group 3 Program, Preventing Sexual Harassment (current year), Code of Ethics for Public Servants (current year), and any other agency required courses in LEO.

d. Modifying your spreadsheet (added July 2015)
You will need to modify your spreadsheet to accommodate staff and training requirement changes. Staff changes include new hires, separations, and actions affecting supervisory group (promotions, demotions, details, reassignments, and reallocations). Training requirement changes include year changes, rule changes and additional requirements. We have found that it is better to keep all information on one spreadsheet rather than using multiple spreadsheets. Moving no-longer-needed columns to the end of the spreadsheet helps keep the current columns more accessible and preservers all your information.

   i. Staff changes
      1. New hires
         a. Insert a row where appropriate (usually alphabetically).
         b. Using the transcript and, if necessary, the training activities report, add the person's information to all applicable columns.
      2. Separations (retirements, transfers out, resignations)
         a. Color the entire row with a fill color that you can see through.
         b. Add the separation date in the Notes column.
      3. Supervisory Group changes
         a. Correct the Supervisory Group column,
         b. Add the date of the change to the Hire date column.
   ii. Training requirement changes
      1. Year changes for annual mandatory training (Ex: Ethics/Sexual Harassment)
         a. Add a column with appropriate title (Ex: Ethics 2015 Done).
         b. Move the previous year column to end of spreadsheet.
      2. Rule changes for mandatory training
         a. Add appropriate columns (Ex: 2015 Core due; 2015 Core done).
            (You already should have the columns for 2015 Mandatory Training if you set up the spreadsheet with all columns named above in step b.)
         b. When old requirements expire, AND after all program completions have been added, move those columns to the end of the spreadsheet. Do not delete them, as this is part of your overall picture of compliance.
            (Ex: After 7/1/2015, once you have added all supervisory program completions, move the 2012 Groups 1, 2, and 3 Due and Done columns.)
      3. Additional requirements
         a. If requirements are added simply add the appropriate column or columns needed.

See: Link to sample spreadsheet

2. NOTIFICATION OF INCOMPLETES & TRAINING REQUIREMENTS

a. Determine who at your department/agency/unit should be notified regarding incomplete/past-due required training. This may take some investigating! Hopefully our information will give you some ideas on possibilities for your area. Our task reminders (TR) and email drafts will reflect our recipients.
    i. It was decided here at SCS for our internal purposes that there would be two primary recipients of notifications regarding incomplete and past-due training:
        1. Our Deputy Director
        2. The applicable unit Chief(s)
    ii. In addition, we will be notifying our agency counsel regarding incomplete Sexual Harassment training because she is tasked with responsibility for that training and also notify our HR chief of incomplete Sexual Harassment and Ethics training.
b. Determine if there are any agency exemptions for any required training. Note that information here and who grants any exemptions.
c. When there are any additions or changes regarding mandatory training, SCS-required or otherwise, notify all affected staff immediately.

See draft email: MTR Changes

3. COURSE PROGRAM SUBSCRIPTIONS

Beginning January 2015, you are required to subscribe supervisors to appropriate Supervisory Course Programs. These are the steps to use to subscribe all supervisors or to verify existing subscriptions.

a. Check transcripts.
    i. Run transcripts as needed to check for potential program completions.
    ii. Using the list of required courses for a program such as Group 1, look for individual course completions.
    iii. If you are in doubt about the completion, contact the CPTP office.
    iv. Add completions to the master checklist spreadsheet.
b. Run the Course Program Participation Report (ZP218). For 2012 rules, include:
    i. PES, Groups 1, 2, 3
    ii. Complete and incomplete programs
c. Using these ZP128 results, check for completions missing from the master checklist spreadsheet.
d. Add the completions from the ZP218 to the master checklist spreadsheet.
e. Subscribe any supervisor remaining on master list with no completion; add the due dates to the spreadsheet.
f. Notify supervisor of persons subscribed; include due dates. (LEO notifies person but not supervisor).

4. NEW EMPLOYEE ORIENTATION

We found here that it worked better for the SCS TC to be part of the orientation process for new hires. Because the SCS TC determines all the training due dates, it was easier for our TC to explain those directly to the new hires. At the end of this section you will see the reference to our How-to Checklist for Orientation, which sets out all the steps in our part of the orientation process. By this point, you will have already determined all the training you will be monitoring, or, as in our case for ORM training, just notifying staff, and have put those on your spreadsheet. This section is where you will list each course or program you are monitoring, to whom that applies, and what the due dates are. Then, you can create a Training Information Sheet, similar to the one mentioned below, which you will give to the employee and file for your records.

a. Review & provide list of training requirements to employee:
    i. Supv Group 1, 2, or 3 current MTR (Mandatory Training Requirements)
        1. Refer to current State Civil Service policy for applicability; include important details here.
        2. Various due dates
    ii. PES Program
        1. Refer to current policy for applicability; include to whom this applies.
            a. Some agencies require all staff to do this training; others apply as stated in rule.
        2. Due within 90 days of hire/promotion
    iii. ORM Blood Borne Pathogens
        1. Refer to current ORM policy; include to whom this applies.
        2. Due within 90 days of hire
        3. Due every five years thereafter
    iv. ORM Defensive Driving
        1. Refer to current ORM policy; include to whom this applies.
        2. Due within 90 days of hire
        3. Due every three years thereafter
    v. Preventing Sexual Harassment
        1. Refer to current state policy; include to whom this applies.
        2. Due by 12/31 of current year
            a. You might want to consider setting an earlier due date so that you can monitor compliance more easily, and staff can avoid LEO access issues.
    vi. Ethics for Public Servants
        1. Refer to current state policy; include to whom this applies.
        2. Due by 12/31 of current year
            a. You might want to consider setting an earlier due date so that you can monitor compliance more easily and staff can avoid LEO access issues.
    vii. Department/Agency/Licensure Required
        1. Policy
        2. Due dates

See: How To Checklist for Orientation
See: Training Information Sheet
See draft email: Supervisor Notice of Training Orientation

Remember to use Forward when dealing with your email drafts, not Send. If you have ever made that mistake before, you will understand this word of warning!

5. PERSONNEL ACTION CHANGES

The SCS TC has ISIS access for our agency only. If you are not in HR and do not have access to ISIS, you will need to work with a contact in your HR unit and create a process whereby you can obtain personnel action changes on a regular basis. The steps below detail what you will need.

a. Run Personnel Action report every 2 weeks to determine personnel actions requiring TC action:
    i. New hires, promotions, reassignments, demotions, return from details, retirement, etc.
b. Run ZMDSHEET (Employee Notification Form) as needed for determining completions under old policies.
c. Review the documents and determine any action needed.
d. Check transcript for completed subscriptions before making any subscription changes.
e. Subscribe/unsubscribe staff to applicable programs.
f. Notify new hire's immediate supervisor of subscription creations/changes/removals & due dates.
g. Update master checklist spreadsheet with new date changes.

See TR: Run Personnel Action Report
See draft email: Supervisor Notice of Subscription/Due Date Changes

6. MONITORING FOR COMPLIANCE

a. ORM Blood Borne Pathogens and Defensive Driving
    i. Put your policy on when and how you will monitor here. We have nothing here because our TC does not monitor for these; she only notifies new hires of due dates.
b. PSH & Ethics
    i. In January, send a notification to staff that PSH & Ethics training is now available through LEO.
        1. We recommend using LEO for Ethics if available since you can track that easily.
        2. If you are not using LEO for these courses, create your first notice of availability.
    ii. In May, send annual reminder of your deadline to entire staff. (SCS has an internal deadline of 10/1.)
    iii. Run Qual report 9/1 (or a month before your deadline).
        1. Use Report Option: EEs with a Qual Record.
        2. Add those completed to the spreadsheet.
        3. Send BCC email to all employees not finished reminding of due dates.
    iv. Run Qual report 10/2 (a day or two after your due date).
        1. Use date range to include due date; for example: 7/1/15 – 10/1/2016.
    v. Send list of incompletes to the person(s) in your agency who has/have been identified to receive them.
        1. Here at SCS, we send one complete list to the Deputy Director and individual incompletes to appropriate unit/division Chiefs. We also copy our General Counsel and HR Chief on the email to the Deputy Director – just for PSH & Ethics.
    vi. Run Qual report 12/1 and add completions to spreadsheet.
    vii. Run Qual report 1st week of January (following year) and add any completions to spreadsheet.

See TR: PSH & Ethics Annual Availability (January)
See draft email: PSH & Ethics Annual Availability (January)
See TR: PSH & Ethics Reminder (May)
See draft email: PSH & Ethics Reminder (May)
See TR: PSH & Ethics Monitoring (September)
See draft email: PSH & Ethics Reminder (September)
See TR: PSH & Ethics Incompletes Check (October)

See draft email: PSH & Ethics Incompletes (To Deputy Director, General Counsel, HR Chief)
See draft email: PSH & Ethics Incompletes (Chiefs)
See TR: PSH & Ethics December check
See TR: PSH & Ethics End of Year Check (January of following year)

c. MTR: Supv Group Programs 1, 2, 3 & Continuing Ed
   i. Groups 1, 2 & 3 Course Programs
      1. Monitor quarterly.
         a. Run Course Program Participation Report.
            i. Select: All-Incomplete and Complete. You will see the due dates and the completion dates.
            ii. Person detailed into a position is monitored on home position, not on detailed position; monitor on actual promotion date.
         b. Update spreadsheet with any completions.
      2. Notify supervisors quarterly of who has not met requirements yet.
      3. Send list of incompletes to the person(s) in your agency who has/have been identified to receive them.

NOTE: Details are monitored on home position, not detailed position.
NOTE: MTR compliance is tracked on the hire/promotion date.
NOTE: If rules change, a supervisor is **not** past due or late if the program due date is currently beyond the new rules' effective date.

Ex: Supervisor has 2015 Group 2 Program due date of 9/15/18. Rules change effective 7/1;/18. Supervisor is not finished with Grp 2 requirements on 7/1/18. Supervisor is **not** past due or late. Supervisor's program due date should be adjusted to new due date according to new rules.

See TR: MTR Due Dates & Status Check & Notification (Quarterly)
See draft email: MTR - Notification of Staff Past Due (Deputy Director)
See draft email: MTR - Notification of Staff Past Due (Chiefs)
See draft email: MTR Incompletions (Supervisors)

   ii. Continuing Education
      1. Requirement begins 7/1/15 for supervisors in Groups 1 & 2.
      2. For new hires/promotions after 7/1/15, MTR Continuing Education courses are to be tracked on Fiscal Year after Supervisory Program requirements are met.
      3. Each fiscal year CPTP will provide list of courses to use and the identifying qual.
      4. Send annual reminder.
         a. Send on 7/1.
         b. Send to all supervisors if using very general language as in the example of ours. OR
         c. Send only to supervisors who are finished with program requirements.
      5. Do first check for completions.
         a. Run Qual Report (ZP 174) 2nd Wednesday in February.
         b. Use Report Option: EEs with Qual Record.
         c. Run on applicable qual, for example: Cont Ed 15-16.
         d. Update spreadsheet with completions.

6. Send BCC email reminder of requirements and deadline to incompletes.
7. Do second check for completions.
    a. Run Qual Report 1st Wednesday in July. (This begins July 2016.)
    b. Use Report Option: EEs with a Qual Record.
    c. Set date range for previous fiscal year.
    d. Run on applicable qual, ex: Cont Ed 15-16.
    e. Update spreadsheet.
8. Send list of incompletes to the person(s) in your agency who has/have been identified to receive them.

See TR: Cont Ed Requirement Reminder (July)
See draft email: Cont Ed Requirement Reminder (July)
See TR: Cont Ed monitoring (FEB)
See draft email: Cont. Ed Reminder (FEB)
See TR: Cont. Ed monitoring (July)
See draft email: Cont. Ed incompletes (Deputy Director)
See draft email: Cont. Ed incompletes (Chiefs)

d. PES
    i. Run Qual report quarterly; use Report Option: All EEs. (We began 5/1/14.)
    ii. Update spreadsheet with completions.
    iii. Send reminder BCC email to anyone not finished; include due dates.
    iv. Send list of incompletes to the person(s) in your agency who has/have been identified to receive them.

See: PES Monitoring – How-To
See TR: PES Monitoring
See draft email: PES Incompletes (Deputy Director)
See draft email: PES Incompletes (Chiefs)

e. Agency-Specific Training
    i. Run qual report quarterly for months Sept. (Started 9/11), Dec., Mar., June; use Report Option: EEs With a Qual Record for these quals:
        1. *Name of course*
        2. *Name of course*
    ii. Update spreadsheet with completion date for those who completed *Name of course*.
    iii. Send semiannual BCC reminder of requirements & deadlines to incompletes.
    iv. Send list of incompletes to the person(s) in your agency who has/have been identified to receive them.

These are suggestions of what might go here:

See TR: *Name of course* check
See TR: *Name of course* Reminder (staff) (semiannually)
See draft email to *Name of person*: *Name of course* Past-due (*Name of person*)
See draft email to Chiefs: *Name of course* Past-due (Chiefs)

7. RECRUITING/ADVERTISING

a. Send info to appropriate staff when CPTP recruits for classes.
    i. Consider creating email drafts with these groups:
        1. All staff
        2. Group 1 Supv
        3. Group 2 Supv
        4. Group 3 Supv
b. Send CPTP schedule to supervisors as it is released.
c. Send other training-related notifications to staff.

See draft email: CPTP Recruiting
See draft email: CPTP New Schedule (Supervisors)
See draft email: CPTP Schedule Update

Appendix

This section will display an example of each item mentioned in the outline in the order of the outline.

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1. MASTER CHECKLIST

See: Link to sample spreadsheet

[TC Outline Master Checklist sample.xlsx]

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2. NOTIFICATION OF INCOMPLETES AND TRAINING REQUIREMENTS

See: MTR Changes

Send

From ▾ Rosanna.Marino@La.Gov

To...

Cc...

Bcc...

Subject: MTR Changes

This is an example of one sent. Change as needed to suit the situation.

Good morning,

There seems to be some confusion about the deadline for supervisors to complete the Group 1 program under the 2012 rules and which capstone to take for 2015 Core Program.

Please note: We did **not** extend the deadline into July for completing (2012) Sup Group 1 Program. Group 1 and 2 supervisors who are finishing under the 2012 rules have ONLY until June 30, 2015, to finish. Those supervisors not complete with Group 1 training requirements under the (2012) Sup Group 1 Program by 6/30/2015 must be subscribed to the CPTP Core Supervisory Group 2015 Program **and** the Supervisory Group 1 2015 Program starting July 1.

The transition period from January through June 2015 was to allow 2012 then-current supervisors additional time to finish their training under the 2012 rules. Employees promoted after January 1, 2015, immediately fell under the 2015 rules. Because the (2012) Sup Group 1 Program became the Core 2015 program, that capstone course provided two quals, Sup 1 Capstone and Core Capstone. This had to be done so completion credit, either for the Sup Group 1 Program or for the Core Program, could be applied.

Starting in July, only the 2015 rules will be in place. The capstones scheduled for July to meet the Core Supervisory Group 2015 Program requirements, at THIS moment, are called Sup 1 Capstones!!!! That is a LEO quirk. On July 1, that name will change to Core Capstone. Those capstones will meet ONLY the Core Supervisory Group 2015 Program requirement. That will take care of the confusion.

The 2015 Group 1 Capstone will meet only the 2015 Group 1 Program requirement - the one with 7 web courses as a prerequisite to the capstone, plus a choice course.

Supervisors promoted to Group 1 during 2015 should have been subscribed upon promotion/hire to both Core and Group 1 2015 programs. If they finish by 6/30/2015 with their Core program, they still have to do the Supervisory Group 1 2015 Program.

Any Group 1 or 2 supervisor who did not promote in 2015 and who is not complete for Group 1 by 6/30/2015, must be subscribed to CPTP Core Supervisory Group 2015 Program with a due date of 6/30/2016 and Supervisory Group 1 2015 Program with a due date of 6/30/2018.

If you have any questions, please let me know.

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4. NEW EMPLOYEE ORIENTATION

See: How-To Checklist for Orientation

HOW TO/CHECKLIST FOR ORIENTATION FOR NEW HIRES

Name:
Hire Date:

Either HR informs you by email that there is a new hire and the date of orientation or the new hire information shows up on the personnel action report.
Print a copy of this sheet to use during orientation; check off each step and date as you go.
Contact new hire's supervisor. Set a date and time to meet with the new hire within the first week (preferably the same day of HR orientation).
Pull ZMDSHEET and Training Transcript.
Review both documents and determine new hire's supervisory group status (if any).
Customize a draft Training Information Sheet with new hire's name, time and date of meeting, list of the training requirements, program subscriptions, and due dates.
Print 2 copies.
Subscribe new hire to necessary programs.
Give new hire a personalized Training Information Sheet and review the requirements and deadlines.

Include due dates for all applicable:

- PES
- Ethics
- Preventing Sexual Harassment
- Supervisory Training Requirements (if applicable)
- Continuing Education training requirements (if applicable)
- ORM Blood Borne Pathogens
- ORM Defensive Driving
- Any other agency-required training

Show new hire how to access training in LEO to include:

- My Training page
- Training Transcripts
- Quick Reference Cards
- Course Catalog and courses offered
- Enrollment process for instructor-led courses
- Waitlists
- Cancellations
- Prebooking
- Booking WBT courses
- Incomplete Programs-Review My Status
- Maps
- Home Page Help Tab

Notify new hire's immediate supervisor of subscriptions, due dates, changes, and removals using email draft: Supervisor Notice of Training Orientation.
Add the new hire and due dates to master checklist spreadsheet.
When done, initial and date this sheet; file with your copy of customized Training Information Sheet in Orientation Folder.

See: Training Information Sheet

TRAINING INFORMATION SHEET

2015 Code of Ethics for Public Servants	DUE:
2015 Preventing Sexual Harassment	DUE:
ORM Blood Borne Pathogens	DUE: 90 days of hire & every five years
ORM Defensive Driving	DUE: 90 days of hire & every three years
PES Programs: PES BASICS WBT PES PLANNING WBT PES EVALUATION WBT	DUE: 90 days of hire

<u>2015 Core Program</u> DUE:

CPTP CS Essentials for Supervisors WBT
CPTP Hiring & Retaining Top Talent WBT
CPTP Myths that Affect Good Supervision WBT
CPTP Leave Management WBT
CPTP Validating Employee Performance WBT
CPTP 2015 Core Capstone Workshop ILT

<u>2015 Group 1 Program</u> DUE:

Situational Leadership 1 WBT
Emotional Intelligence 1 WBT
Change Management WBT
Top Down Messages WBT
Building Trust WBT or Ethical Behavior ILT
Inspirational Leadership WBT
Work Processes WBT OR Managing & Improving Work Processes ILT
2015 Group 1 Capstone Workshop ILT
Choice Course: Peer to Peer Conflict WBT OR Delegating Effectively WBT OR Teams 1 ILT

<u>2015 Supervisory Group 2</u> DUE:

Situational Leadership 2 WBT
Emotional Intelligence 2 WBT
Strategic Thinking WBT
Organizational Dynamics WBT OR Developing a Motivated Work Group ILT
Ethical Leadership WBT
Work/Life Balance WBT
Prioritizing Tasks with Agency Mission WBT
2015 Group 2 Capstone Workshop ILT
Choice Course: Conflict Management WBT OR Effective Conflict Resolution Strategies ILT OR Critical Thinking WBT OR Teams II ILT

<u>2015 Group 3 Program</u> DUE:

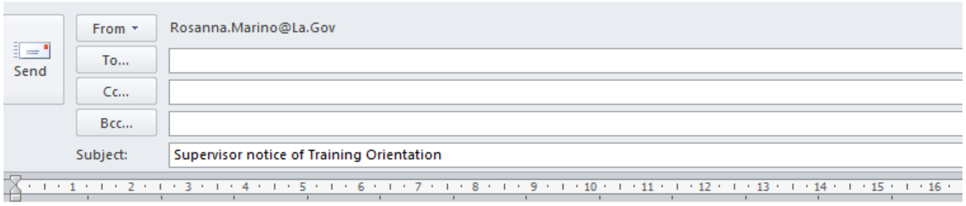
CPTP CS Essentials for Supervisors WBT
CPTP Hiring & Retaining Top Talent WBT
CPTP Myths that Affect Good Supervision WBT
CPTP Leave Management WBT
CPTP Validating Employee Performance WBT

<u>2015 Continuing Education</u> DUE:

<u>(Example: Agency-specific training) Continuing Education</u>

2 courses (WBT &/or ILT) DUE:

See draft email: Supervisor Notice of Training Orientation



Hi, (supervisor's name),

I recently did the training orientation with (name). I subscribed (him/her) to the following programs:
PES (due date)
Supervisory Group (1, 2, 3) (due date)

I also informed (him/her) of the due dates for the following courses:
Ethics (due date)
Preventing Sexual Harassment (due date)
(Name) (due date)

If you have any questions, please contact me.

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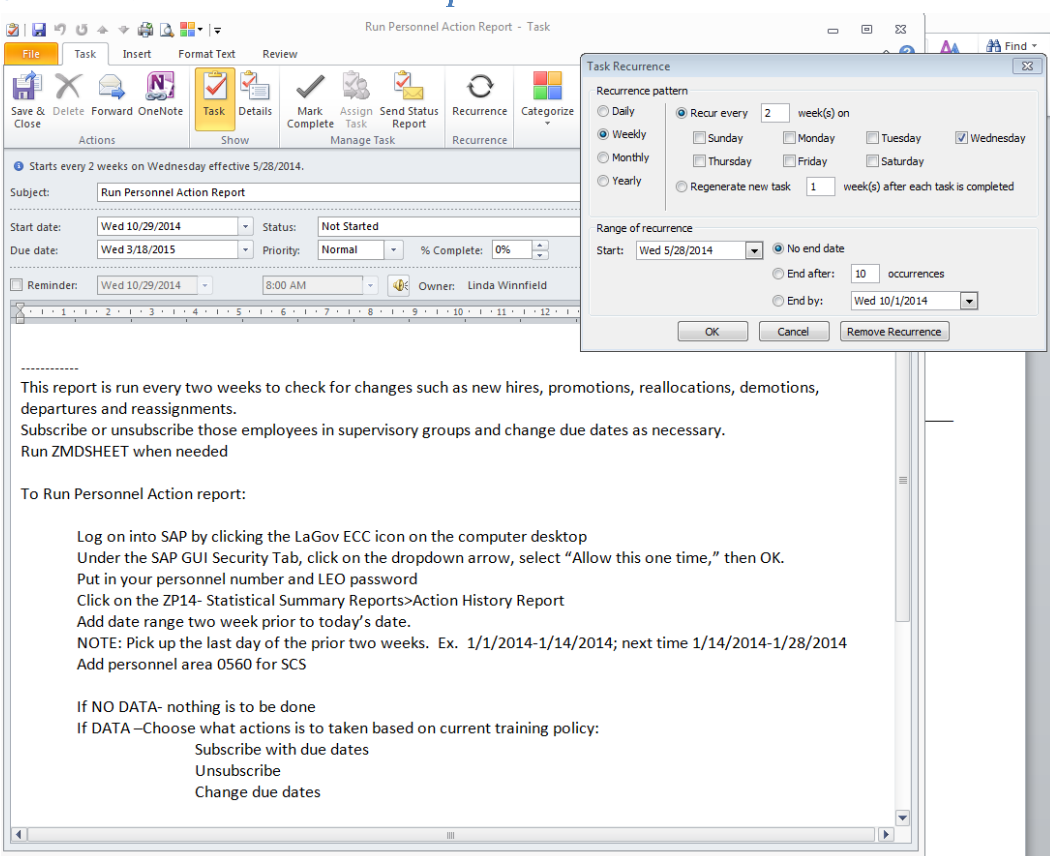
5. PERSONNEL ACTION CHANGES

See TR: Run Personnel Action Report



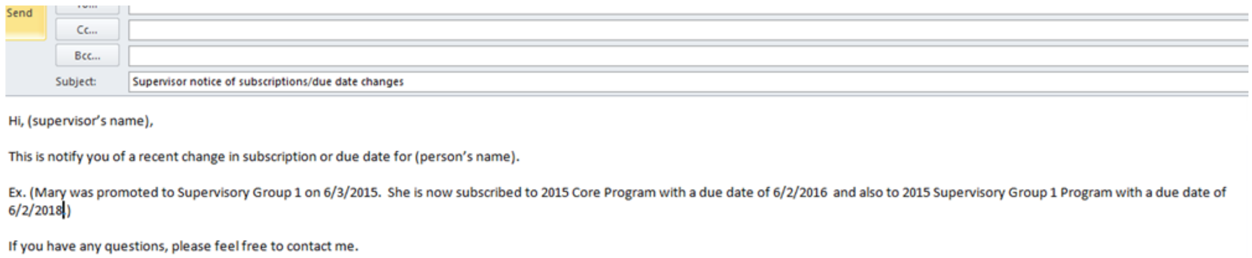
This report is run every two weeks to check for changes such as new hires, promotions, reallocations, demotions, departures and reassignments.
Subscribe or unsubscribe those employees in supervisory groups and change due dates as necessary.
Run ZMDSHEET when needed

To Run Personnel Action report:

Log on into SAP by clicking the LaGov ECC icon on the computer desktop
Under the SAP GUI Security Tab, click on the dropdown arrow, select "Allow this one time," then OK.
Put in your personnel number and LEO password
Click on the ZP14- Statistical Summary Reports>Action History Report
Add date range two week prior to today's date.
NOTE: Pick up the last day of the prior two weeks. Ex. 1/1/2014-1/14/2014; next time 1/14/2014-1/28/2014
Add personnel area 0560 for SCS

If NO DATA- nothing is to be done
If DATA –Choose what actions is to taken based on current training policy:
Subscribe with due dates
Unsubscribe
Change due dates

See draft email: Supervisor Notice of Subscription/Due Date Changes



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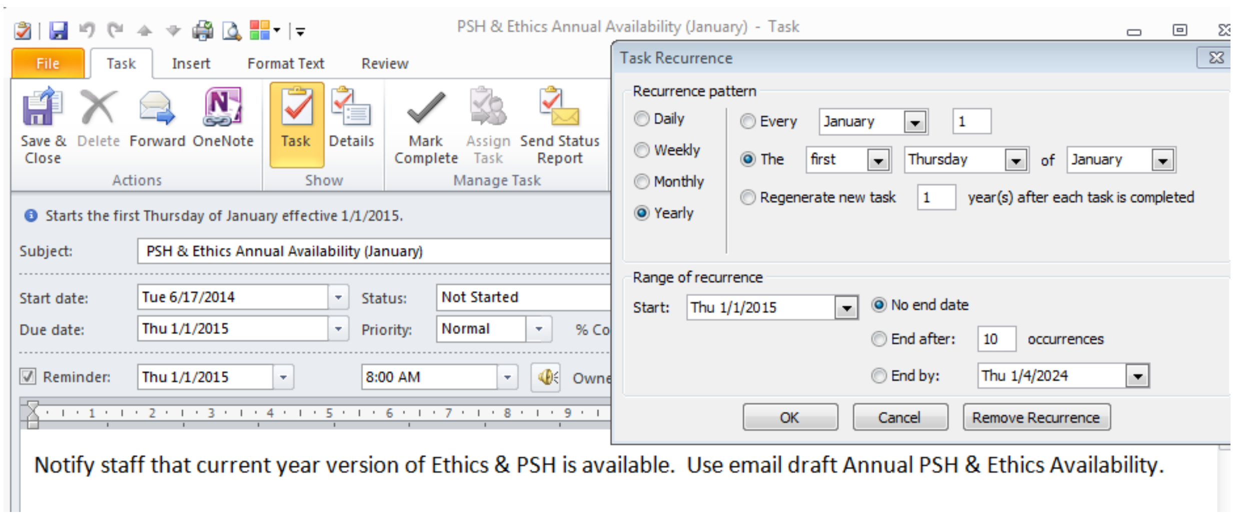
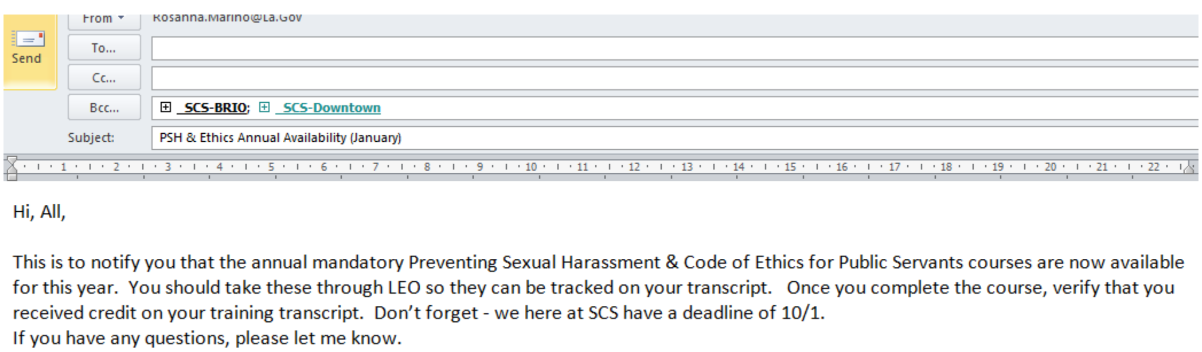
6. MONITORING FOR COMPLIANCE

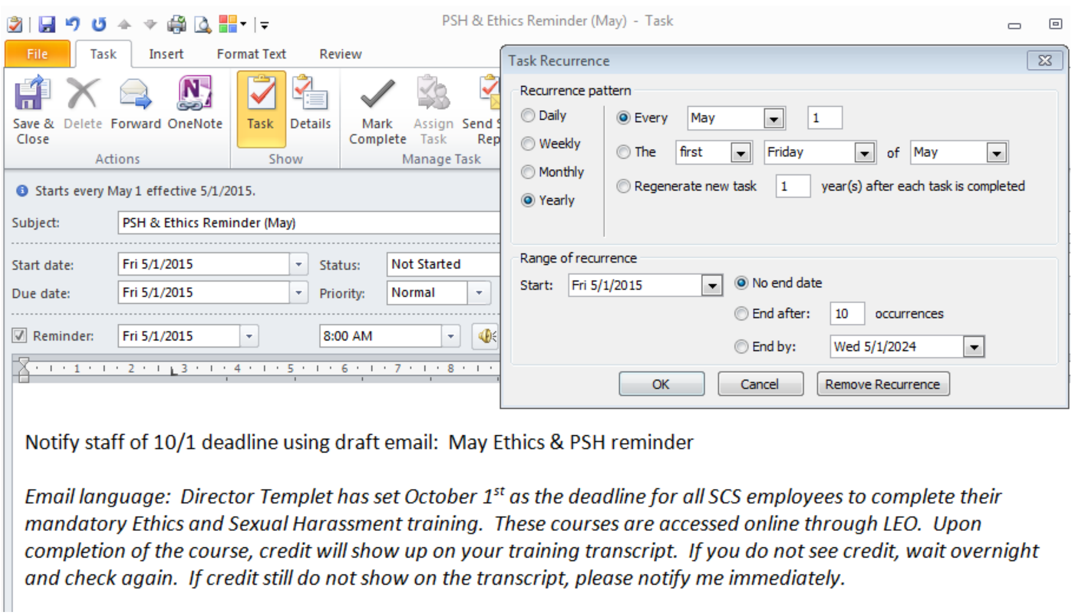
See TR: PSH & Ethics Annual Availability (January)



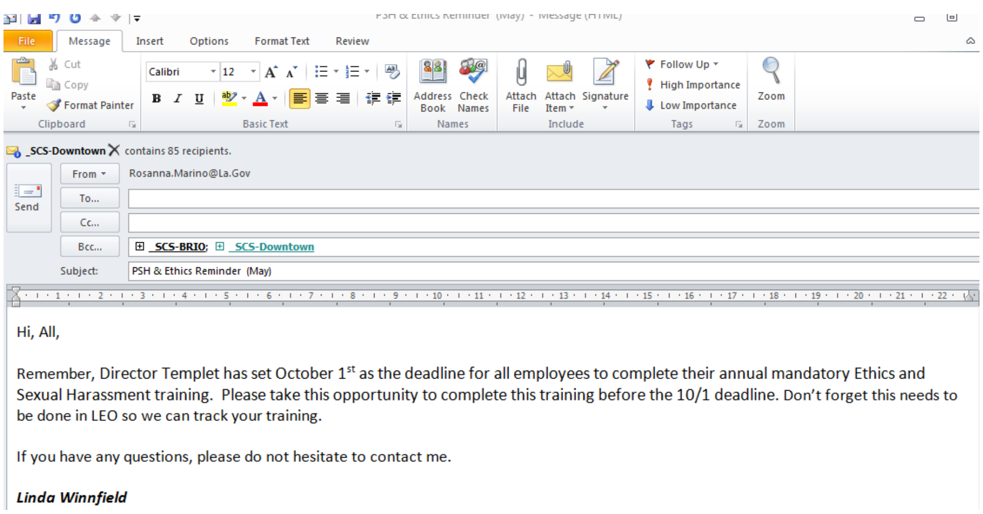
See draft email: PSH & Ethics Annual Availability (January)



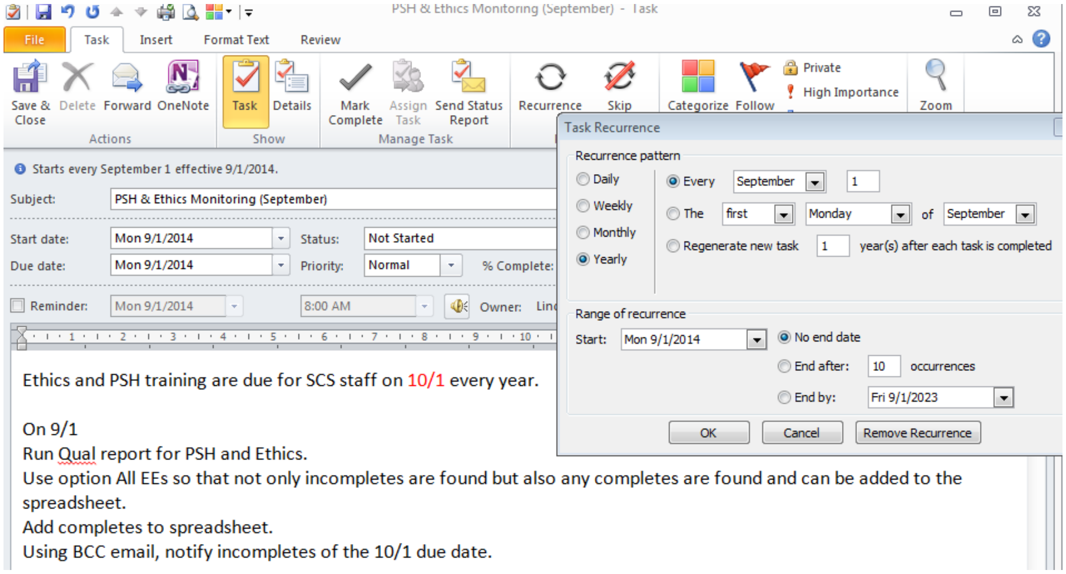
See TR: PSH & Ethics Reminder (May)



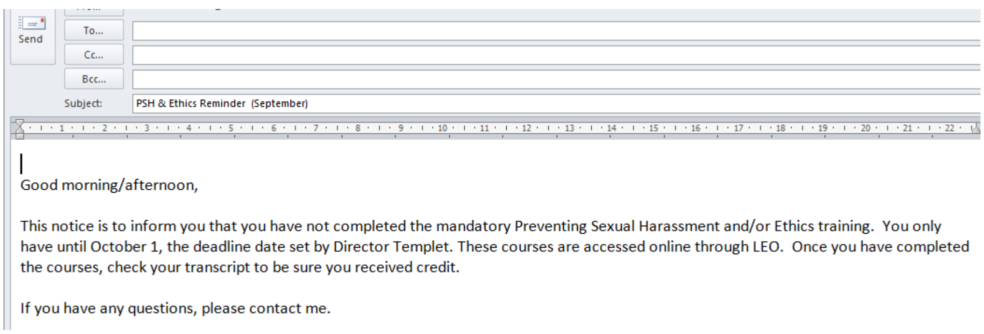
See draft email: PSH & Ethics Reminder (May)



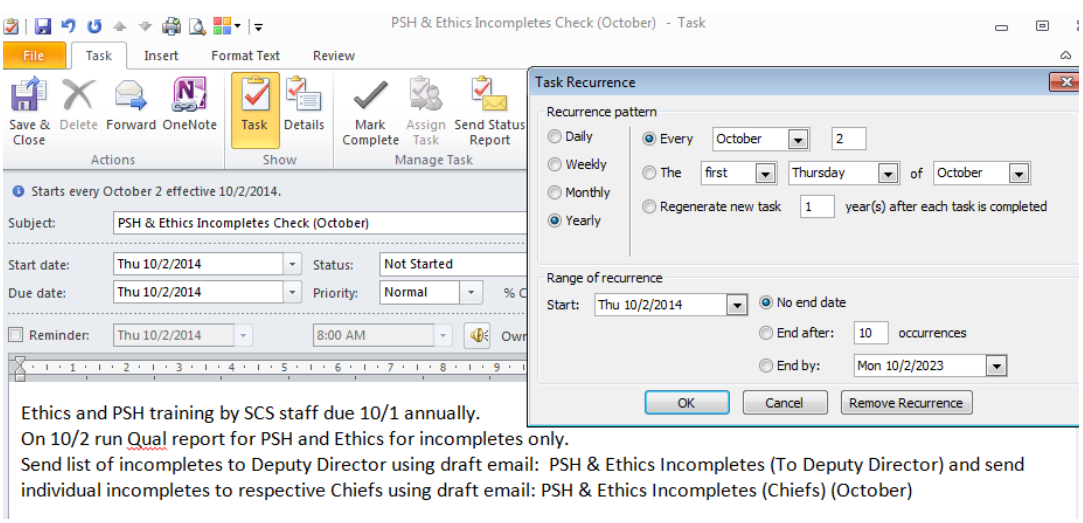
See TR: PSH & Ethics Monitoring (September)



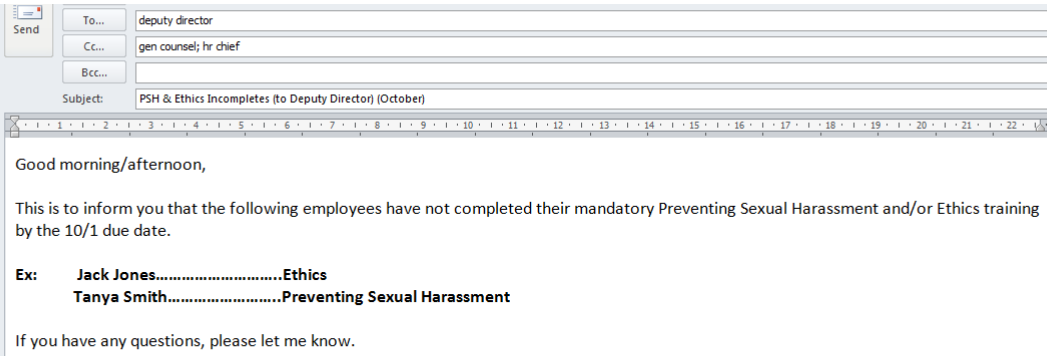
See draft email: PSH & Ethics Reminder (September)



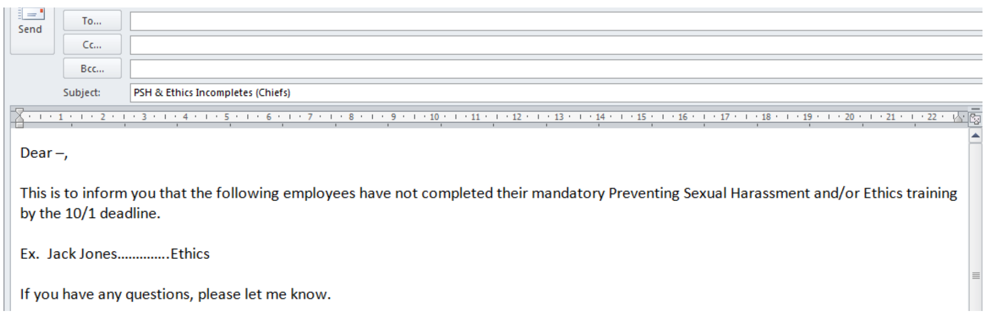
See TR: PSH & Ethics Incompletes Check (October)



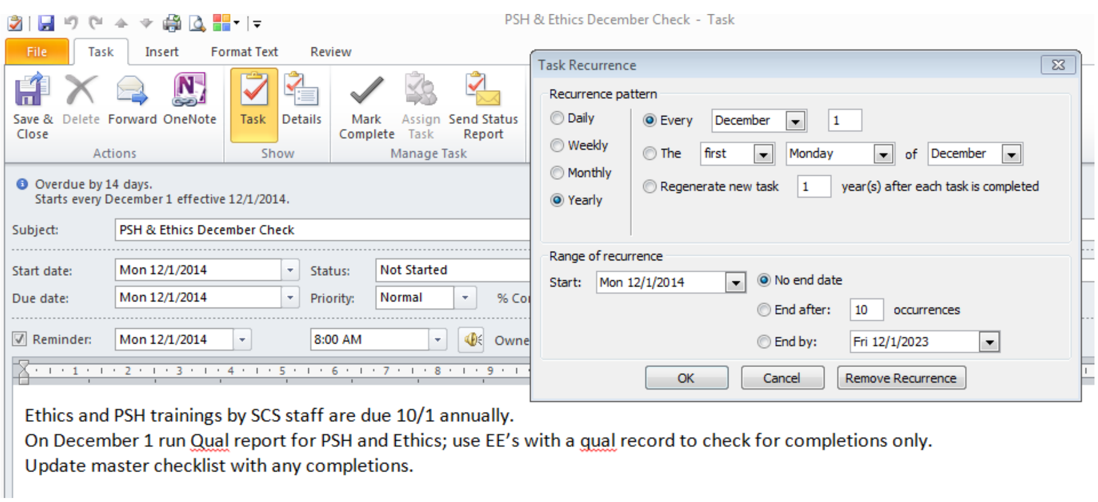
See draft email: PSH & Ethics Incompletes (To Deputy Director, General Counsel, HR Chief)



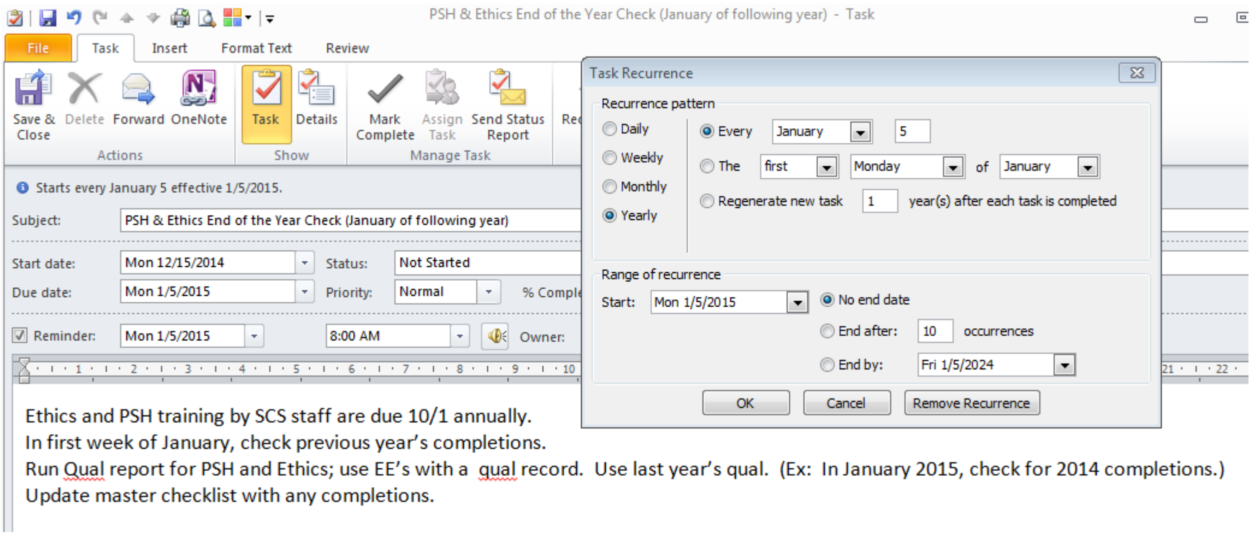
See draft email to Chiefs: PSH & Ethics Incompletes (Chiefs)



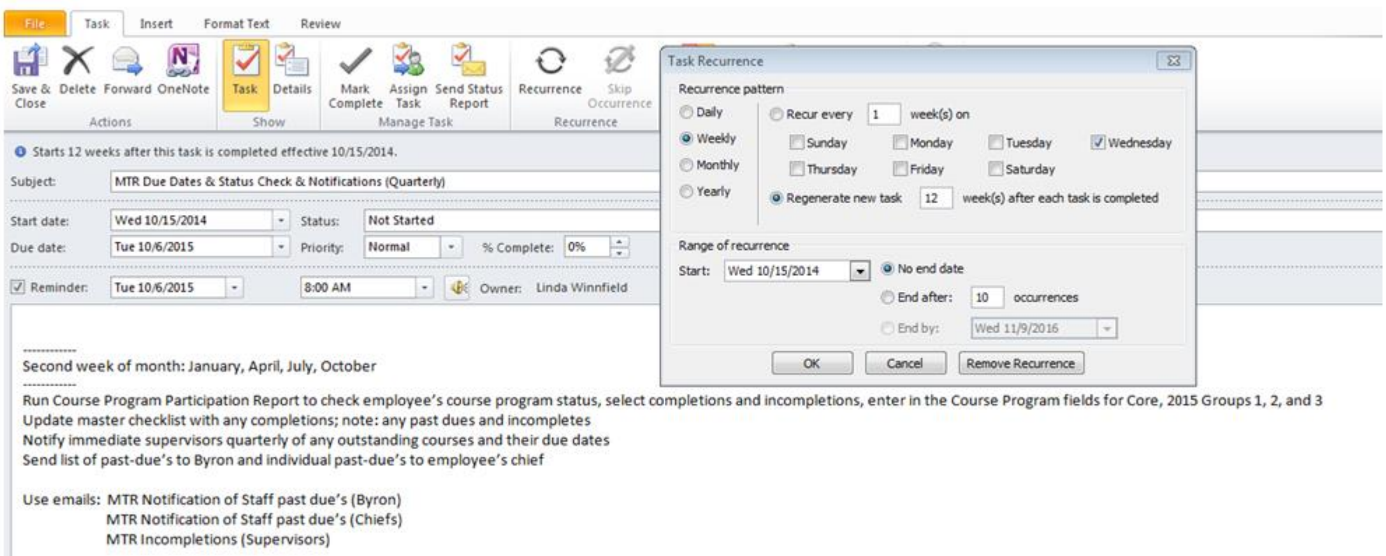
See TR: PSH & Ethics December check



See TR: PSH & Ethics End of Year Check (January of following year)



See TR: MTR Due Dates & Status Check & Notifications (Quarterly)



See draft email: MTR- Notification of Staff Past Due (Deputy Director)

Send

To... Deputy Director

Cc...

Bcc...

Subject: MTR - Notification of Staff Past Due

Good morning/afternoon,

This is to inform you that the employees listed below have not completed their Mandatory Training requirement by their due dates:

Ex: Jack Jones..............Sup Group 1............Due 1/1/2011
Tanya Smith...........Sup Group 2............Due 12/13/14

If you have any questions, please let me know.

With regards,

See draft email: MTR- Notification of Staff Past Due (Quarterly) (Chiefs)

Send

To...

Cc...

Bcc...

Subject: MTR- Notification of Staff Past Due (Chiefs)

Good morning/afternoon,

This is to inform you that the employees listed below have not completed their Mandatory Training Requirements by their due dates.

Ex. Jack Jones......................Sup Group 1.....................Due 1/1/2014

If you have any questions, please let me know.

Thanks,

See draft email: MTR Incompletions (Quarterly) (Supervisors)

Send

To...

Cc...

Bcc...

Subject: MTR Incompletions (Supervisors)

Good morning/afternoon,

This is to inform you that the employees listed below have not completed their Mandatory Supervisory Training Requirements yet.

Ex. Jack Jones......................Sup Group 1

If you have any questions, please let me know.

Thanks,

See TR: Cont. Ed Requirement Reminder (July)

Starts every July 1 effective 7/1/2015.

Subject: Cont. Ed. Notification (July)

Start date: Wed 7/1/2015 Status: Not Started

Due date: Fri 7/1/2016 Priority: Normal % Complete: 0%

Reminder: Fri 7/1/2016 8:00 AM Owner: Linda Winnfield

Range of recurrence

Start: Wed 7/1/2015 No end date

End after: 10 occurrences

End by: Mon 7/1/2024

OK Cancel Remove Recurrence

Send (BCC) notification to supervisors who have finished their requirements under previous year rules. (Supervisors under 2015 rules do not have CE requirements until after program due dates have passed.)

Good morning/afternoon

As you know, under the new 2015 CPTP Mandatory Training Requirement policy, supervisors who have finished their Group 1 and/or Group 2 program requirements now have an annual continuing education requirement of one training course from the list identified by CPTP.

NOTE: Change everything highlighted: Correct list and correct dates. Remove highlights before sending

The following courses will satisfy the CPTP Continuing Education requirement under the 2015 Mandatory Supervisory Training Requirements. Learners may take any one of the courses below to earn the credit.

1. CPTP Building Trust WBT[1]
2. CPTP Managing and Improving Work Processes WBT
3. CPTP Change Management WBT
4. CPTP Communicating Top Down Messages WBT
5. CPTP Emotional Intelligence I WBT
6. CPTP Emotional Intelligence II WB
7. CPTP Situational Leadership 1 WBT
8. CPTP Situational Leadership 2 WBT
9. CPTP Organizational Dynamics WBT
10. CPTP Ethical Leadership WBT
11. CPTP Strategic Thinking WBT
12. CPTP Work Life Balance WBT
13. CPTP Strategic Alignment WBT
14. CPTP Professional Writing Skills ILT[2]
15. CPTP Customer Service II WBT
16. CPTP Mentoring in the Workplace WBT
17. CPTP Effective Performance Evaluations ILT
18. CPTP Project Manager's Role WBT
19. CPTP Preventing Workplace Violence for Supervisors WBT
20. CPTP Dealing with Difficult People WBT

[1]WBT indicates web-based training. [2]ILT indicates instructor-led training.

During the course of the Performance Year (7/1/15 – 6/30/16), each of the courses above will impart two qualifications. One qualification imparted is the course completion qualification, for example, CPTP Building Trust WBT. The second qualification imparted is the CPTP Continuing Education qualification (designated on transcripts as CPTP Cont Ed PY 15-16). The continuing education qualification will only be imparted beginning July 1, 2015 through June 30, 2016.

Thanks,

See draft email: Cont. Ed Requirement Reminder (July)

Good afternoon,

As you know, under the new 2015 CPTP Mandatory Training Requirement policy, supervisors who have finished their Group 1 and/or Group 2 program requirements now have an annual continuing education requirement of one training course from the list identified by CPTP.

The following courses will satisfy the CPTP Continuing Education requirement under the 2015 Mandatory Supervisory Training Requirements. Learners may take any one of the courses below to earn the credit.

1. CPTP Building Trust WBT[1]
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5. CPTP Emotional Intelligence I WBT
6. CPTP Emotional Intelligence II WB
7. CPTP Situational Leadership 1 WBT
8. CPTP Situational Leadership 2 WBT
9. CPTP Organizational Dynamics WBT
10. CPTP Ethical Leadership WBT
11. CPTP Strategic Thinking WBT
12. CPTP Work Life Balance WBT
13. CPTP Strategic Alignment WBT
14. CPTP Professional Writing Skills ILT[2]
15. CPTP Customer Service II WBT
16. CPTP Mentoring in the Workplace WBT
17. CPTP Effective Performance Evaluations ILT
18. CPTP Project Manager's Role WBT
19. CPTP Preventing Workplace Violence for Supervisors WBT
20. CPTP Dealing with Difficult People WBT

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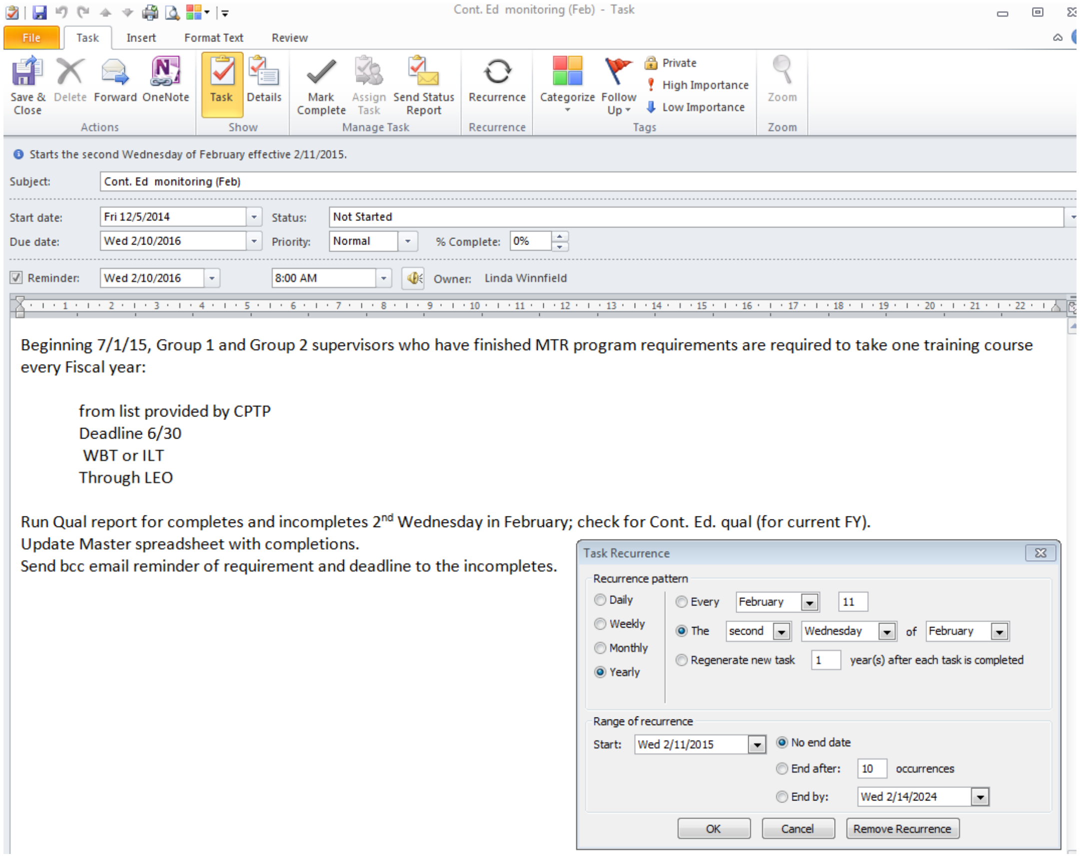
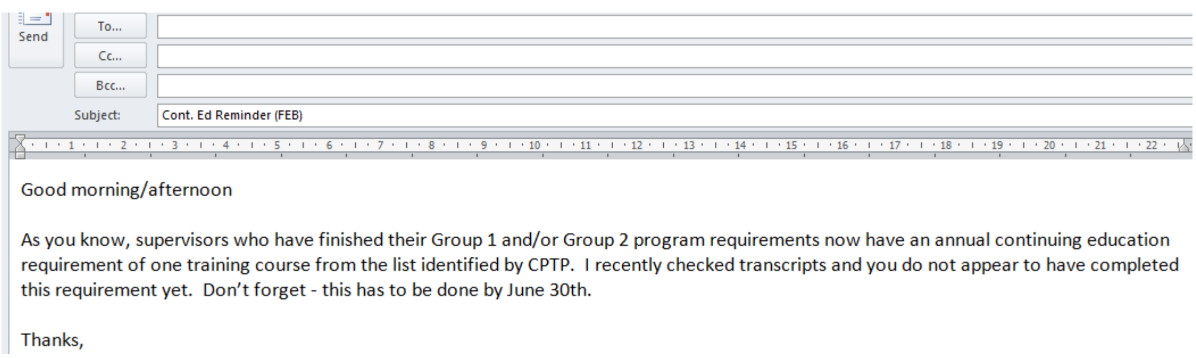
Thanks,

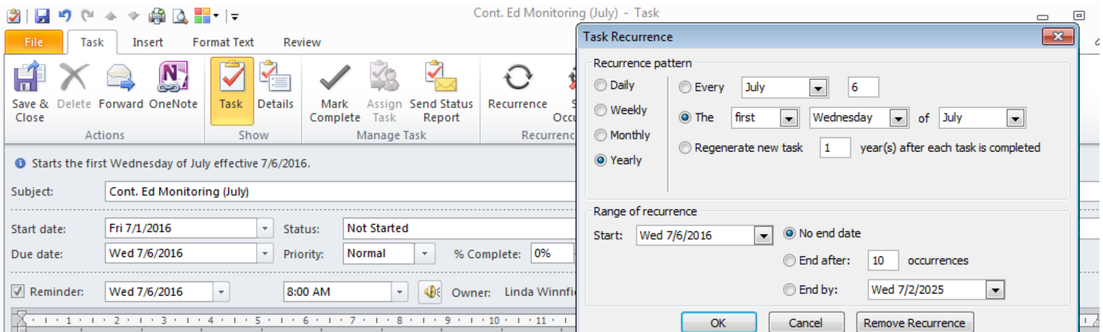
See TR: Cont. Ed monitoring (FEB)



See draft email: Cont. Ed Reminder (FEB)



See TR: Cont. Ed monitoring (July)



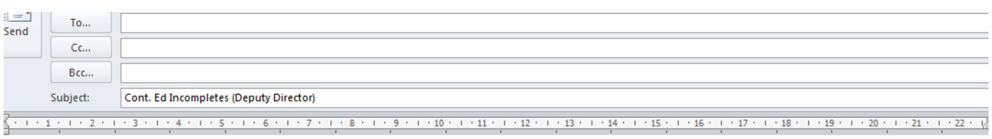
Check for completions of annual Continuing Ed requirement of one course from list of 20 provided by CPTP.

This check begins July 2016.

Run:
Qual report
Date range of previous fiscal year
Use EEs with a qual record
Cont. Ed. qual for previous FY
Recurring on 1st Wednesday in July

Update Master spreadsheet with completions.
Send list of incompletes to the person(s) identified in your agency who has/have been identified to receive them.

See draft email: Cont. Ed incompletes (Deputy Director)

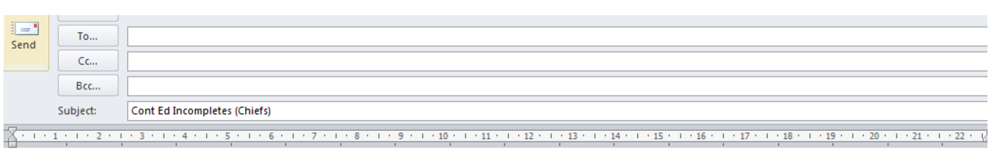


Dear (name),

The staff listed below did not complete the CPTP Mandatory Training Requirement of one Continuing Education course this past fiscal year.

Sincerely,

See draft email: Cont. Ed incompletes (Chiefs)



Dear (name),

The staff listed below did not complete the CPTP Mandatory Training Requirement of one Continuing Education course this past fiscal year.

Sincerely,

See: PES Monitoring – How-To

PES MONITORING – HOW-TO

PES Program training is due 90 days after hire.
PES training must be completed by any person who supervisors another staff member. That person does not necessarily have to be in a supervisory group.
New employees are subscribed at hire as part of orientation.

1. **Run Qual report quarterly.**
   a. **Run for PES program and select Report Option: All EEs.**
   b. **Add completion dates as applicable to spreadsheet.**
   c. **Determine the incompletes.**

2. **Send bcc reminder to anyone not completed; include due dates.**
   Send this reminder only to those who are incomplete. There may be people on the list whose due date has not yet occurred.

3. **Send a list of persons who are past-due to Deputy Director and send to the appropriate Chiefs the names of their staff members who are past due.**

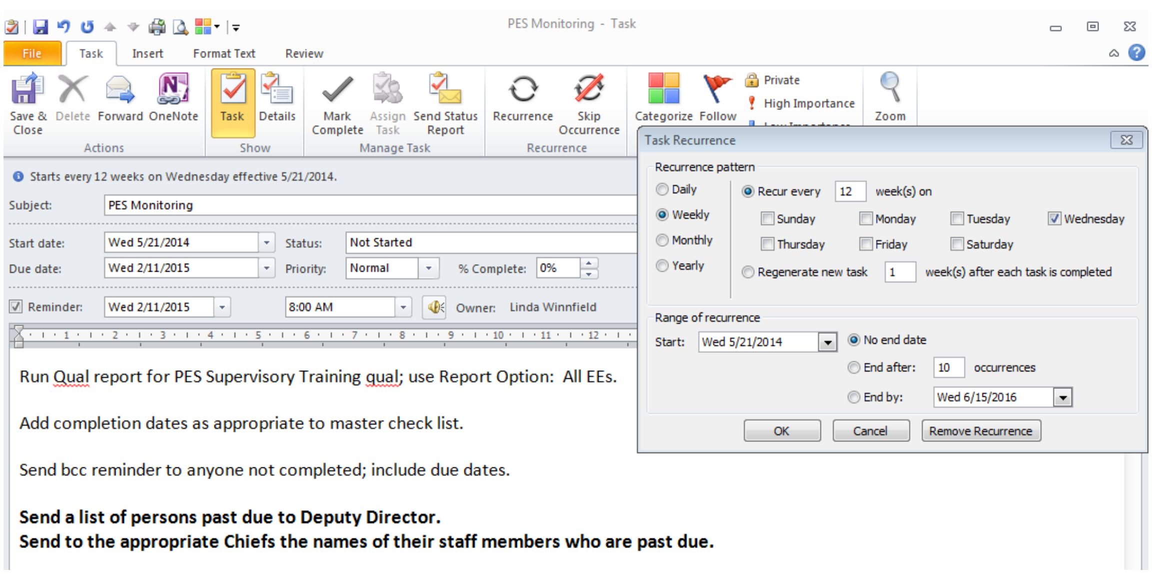
PES Monitoring Task Reminder created and set for every 12 weeks:

Run Qual report for PES Supervisory Training qual, selecting Report Option: All EEs.

Add completions dates as applicable to master checklist.

Send a list of persons who are past-due to Deputy Director and send to the appropriate Chiefs the names of their staff members who are past due.

See TR: PES Monitoring



See draft email: PES Incompletes (Deputy Director)

To... Deputy Director
Cc...
Bcc...
Subject: PES Incompletes (Deputy Director)

Good morning/afternoon, (name),

This is to inform you that the staff member listed below has not completed his mandatory Performance Evaluation System (PES) training by his required due date.

Jack Jones.................12/1/2014

If you have any questions, please let me know.

Sincerely,

See draft email: PES Incompletes (Chiefs)

To... administration unit chief
Cc...
Bcc...
Subject: PES Incompletes (Chiefs)

Dear (name),

This is to inform you that the employees listed below have not completed their mandatory PES training by the 90 day deadline.

Jane Doe..............12/1/2014
Tanya Smith 12/15/2014

If you have any questions, please contact me.

Sincerely,

---

7. RECRUITING/ADVERTISING

See draft email: CPTP Recruiting

Cc...
Bcc... supervisors
Subject: CPTP Recruiting

Good afternoon,

CPTP has an upcoming class for supervisors that has low enrollment: **Conducting Productive Performance Reviews** on **January 15th** in Baton Rouge. This class is open to any supervisor who conducts PES. This class will help build skills for actually conducting the performance evaluation. If you supervise but are not in a supervisory group, would like to attend but are being blocked by LEO, let me know. I can enroll you. Otherwise, self-enrollment is available. CPTP will make the decision to cancel that class on January 11. If you are interested, please enroll soon.

Thanks,

See draft email: CPTP New Schedule (Supervisors)

Send

To...

Cc...

Bcc... supervisors

Subject: CPTP New Schedule

Use something like this depending on the list of courses. CPTP may have some wording in the original email that could be used here. REMOVE all highlights.

Hi,

CPTP has released the schedule for (MONTH). There are class dates for the 2015 Core Capstone, 2015 Group 1 Capstone, as well as the 2015 Group 2 Capstone. In addition, there are courses open to both supervisors and non-supervisors such as Professional Writing Skills and Managing Work Time Effectively. There are also a few other courses supervisors may find helpful. Please take a few moments to review these course offerings and pass this on to your staff. Self-enrollment is available in LEO.

If you have a staff member who supervises but is not in a supervisory group or a non-supervisor whom you would like to have attend a supervisory course, let me know and I will enroll the person for you.

Thanks,

See draft email: CPTP Schedule Update

Send

To...

Cc...

Bcc... SCS-BRIO; SCS-Downtown

Subject: CPTP Schedule Update

Hi, All,

CPTP announced a change in class times. Beginning 1/20/2015, CPTP classes will start at 8:30.

Sincerely,
