

CMS Interface for OJT Assessments

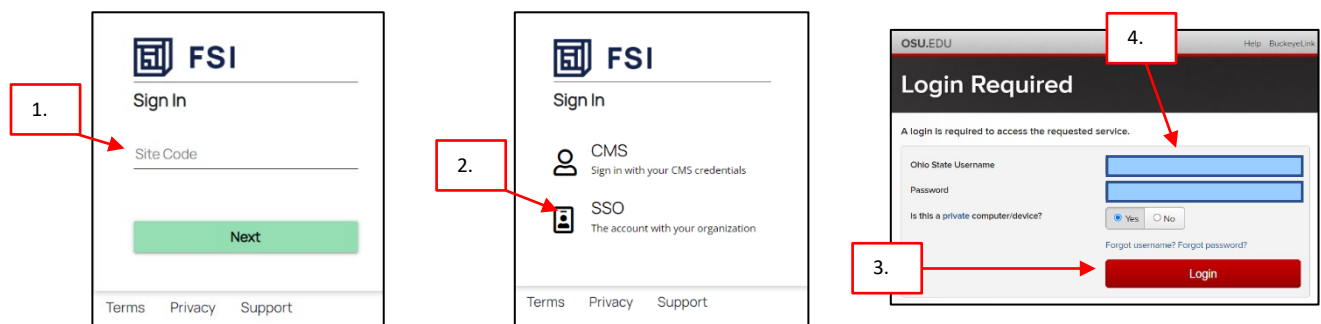
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CMS Interface for Technician Mentors

This is a step-by-step instruction using graphics to guide technicians on how to interface with the CMS as Mentors to create a record of their Mentee's training activity and assessment. Technicians should follow these procedures for tracking Mentee progress and reporting purposes.

Login to the CMS System

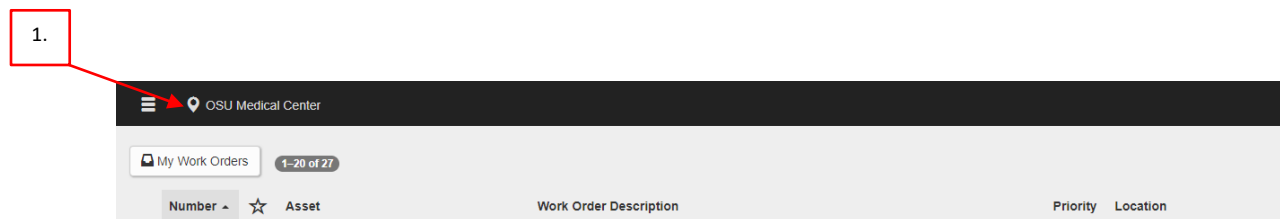
1. Sign into CMS: <https://cmstech.facsur.com/> from your web browser or use the CMS App on the tablet.
2. From the web browser: Site Code: OSU
3. Select SSO (Single Sign-on Security)
4. Type in University credentials (Name.# and password) and click on: *Login*. The CMS Dashboard will appear.



Changing Campus Facility Location

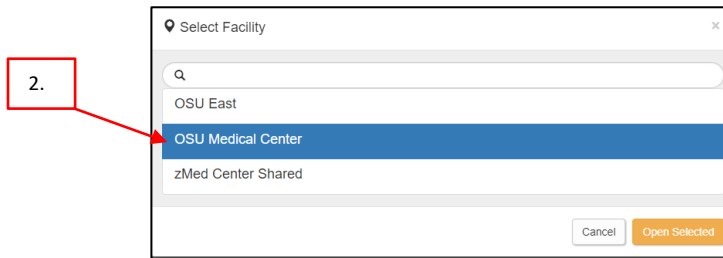
All OJT Training and Assessments Tasks are configured to the OSUMC for reporting purposes. Employees on the Academic campus or student life must change their location in the CMS to record training sessions and assessments. If you do not have the option for selecting the OSUMC, please contact the FOD Learning Specialist.

1. Locate the map "Pin" in the top left corner. Use the mouse cursor to click on the Pin.



A pop-up window will appear listing the campus facilities approved for access.

2. Select OSU Medical Center and click on “Open Selected.”



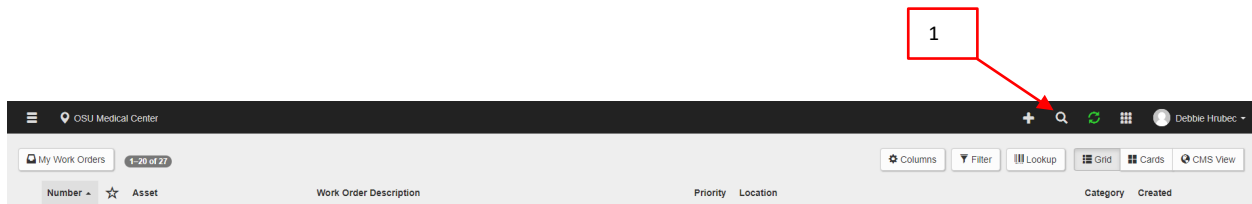
Creating a Saved Search for easy access

Creating a saved search will allow you to readily access your Mentee’s OJT Assessment tasks for tracking their training and assessment progress.

To set up the saved search:

From the Work Order View, set up a “Saved Search” for easy access to your Mentee OJT Assessments.

1. Select the Work Order (WO) Search Icon. A pop-up window will appear.



Check to make sure the Search pop-up fields are clear.

2. Select the “Clear” button in the bottom left corner if needed.
3. Select the “Status” field.

Note: When clear, the “Save” icon is visible. If the “Edit” is visible you will need to clear the fields.

The screenshot shows the 'WO Search' pop-up window. It contains several input fields for search criteria: Work Order Number, Work Order Description, Status (set to 'None'), Priority (set to 'None'), Category (set to 'None'), Trade (set to 'None'), Assignment (set to 'None'), Location (set to 'None'), Room #/Area, Requestor Name, Requestor Phone, Requestor Email, Requestor Comments, and Available Date (set to 'None'). At the bottom left is a red 'Clear' button, and at the bottom right are 'Close' and 'Search' buttons. A red box labeled '3.' points to the 'Status' dropdown menu, and another red box labeled '2.' points to the 'Clear' button.

A pop-up window will appear.

In the pop-up window:

4. Change “None” if applicable or click on “Active” if automatically populated.
5. Select the “OK” button.

This will return you to the main WO Search pop-up window displayed earlier.

The screenshot shows the 'Status Select' pop-up window. It features a search bar at the top, followed by a list of status options: (Blank), Active (highlighted in blue with a checkmark), Cancelled, Complete, Pending, and Review (CMS Asset/Procedure Issues Only). At the bottom left is a red 'Clear' button, and at the bottom right are 'Cancel' and 'OK' buttons. A red box labeled '4.' points to the 'Active' status option, and another red box labeled '5.' points to the 'OK' button.

Scroll down the WO Search window to the Asset Number field.

6. Type in the Asset Number (e.g., *OJT-FM01-mentee name*).
7. Select Save.

The screenshot shows the 'WO Search - OJT-FM01-HRUBEC' window. It contains several filter sections: 'Available Date', 'Needed By Date', 'Completed Date', and 'Date Created', each with a 'None' dropdown and date input fields. Below these are fields for 'Asset Number' (containing 'OJT-FM01-HRUBEC'), 'Asset Description', 'Asset Category' (None), 'Asset Classification' (None), and 'Asset Status' (None). A red box labeled '6.' points to the 'Asset Number' field. At the bottom right, a red box labeled '7.' points to the 'Search' button. Other buttons include 'Clear', 'Close', and 'Edit'.

A blue highlighted area will populate for naming the Search.

8. Select the "Search Name" field. Type in Asset Number (e.g., *OJT-FM01-name*).
9. Select the Green "Save Search" button.

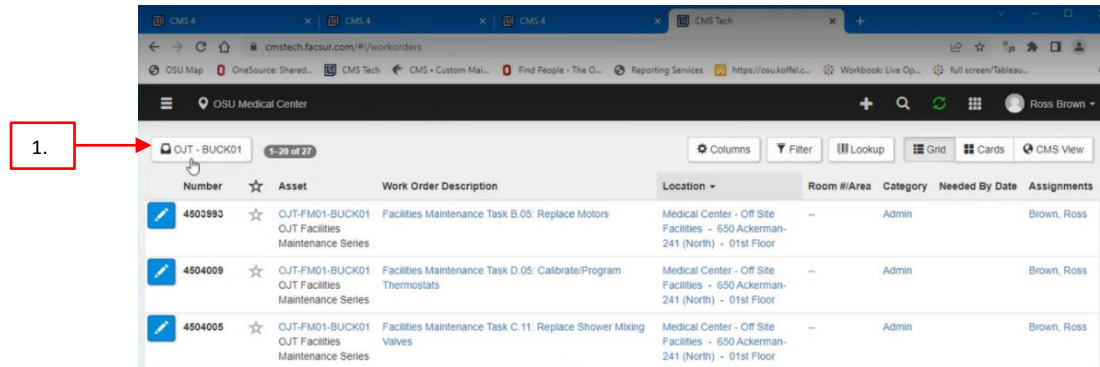
The screenshot shows the 'WO Search' window with a blue highlighted area at the top. This area contains a 'Search Name' field (containing 'OJT - BUCK01') and a 'Search Description' field. Below this is a 'Public Search' toggle switch. A red box labeled '8.' points to the 'Search Name' field. A red box labeled '9.' points to the green 'Save Search' button. Below the highlighted area are fields for 'Work Order Number', 'Work Order Description', 'Status' (with '(6) Items Selected'), 'Priority' (None), 'Category' (None), 'Trade' (None), and 'Assignment' (None). Buttons for 'Clear', 'Close', and 'Search' are at the bottom.

Note: This will create a private named search with the OJT Assessment Tasks and Procedures assigned to the mentee.

To access the Mentee’s OJT Assessment Task Work Order List

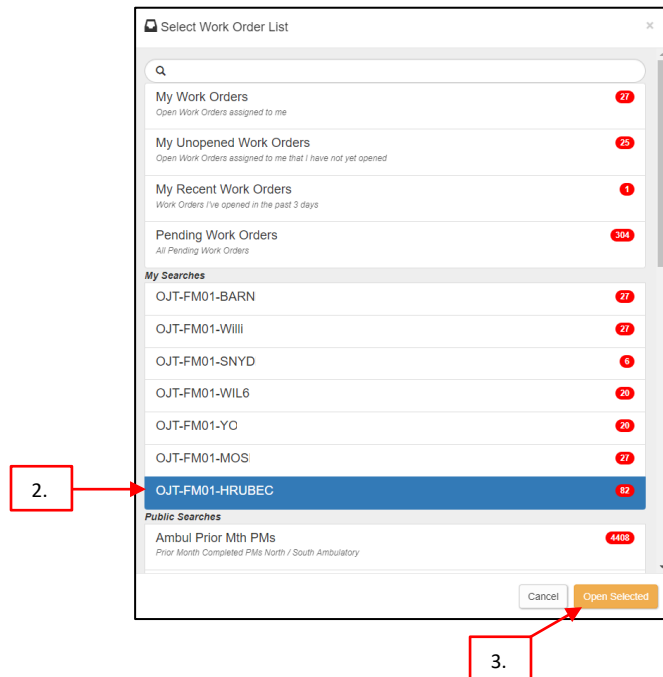
Once you have created a saved search, you will be able to easily access your Mentee’s active OJT Assessment tasks.

1. Select the Work Order List button.



A pop-up window will appear. You can then select between active work orders, or the OJT Assessments for the Mentee saved in “My Searches.”

2. Select the Mentee Asset Number (e.g., OJT-FM01-name).
3. Then click on the “Open Selected” button.



- Select the pencil icon for the desired corresponding Work order OJT Assessment item (Work order Description).

Number	Asset	Work Order Description	Priority	Location
4350382	OJT-FM01-HRUBEC.2 OJT Facilities Maintenance Series - Debbie Hrubec	Facilities Maintenance Task C.08: Replace Supply Lines		Medical Center - Off Site Facilities - 650 Ackerman- 241 (North) - 01st Floor
4350259	OJT-FM01-HRUBEC.2 OJT Facilities Maintenance Series - Debbie Hrubec	Facilities Maintenance Task C.11: Replace Shower Mixing Valves		Medical Center - Off Site Facilities - 650 Ackerman- 241 (North) - 01st Floor
4350388	OJT-FM01-HRUBEC.2 OJT Facilities Maintenance Series - Debbie Hrubec	Facilities Maintenance Task D.05: Calibrate/Program Thermostats		Medical Center - Off Site Facilities - 650 Ackerman- 241 (North) - 01st Floor

The OJT Assessment Work Order will populate.

- Select *Procedures* from the menu on the left.

Work Order 4350382

Overview

Work Order Description
Facilities Maintenance Task C.08: Replace Supply Lines

Status: Cancelled
Priority: None
Location: Medical Center - Off Site Facilities - 650 Ackerman - 01st Floor
Room #/Area: --
Common Problem: None
Available Date:
Needed By Date:
Category: Admin
Trade: Facilities Services Office

History Duplicate

The standard procedures related to the OJT training sessions and Final assessment will populate.

- Click on the drop-down arrow or anywhere in the empty field to enter the type of training activity is that is being conducted. Select: *Mentee Observation Only*, *Observation & Practice*, *Practice Only*, or *Final Skills Assessment*.
 - Observation Only: Mentee watches as the Mentor provides instruction while performing the task.
 - Observation & Practice: Mentee practices the task while the Mentor observes and provides guided instruction.
 - Practice Only: The Mentee practices the task with minimal intervention from the Mentor.
 - Final Assessment: The Mentee performs the task independently while the Mentor and supervisor/manager evaluates their performance.

Work Order 4350382

Procedures

Facilities Maintenance Task C.08: Replace Supply Lines

OJT-FM01-HRUBEC 2 - OJT Facilities Maintenance Series - Debbie Hrubec - Medical Center - Off Site Facilities - 650 Ackerman - 01st Floor - ...

Are you completing this form to record the Mentee's Observation Only, Observation & Practice, Practice Only or to conduct an evaluation for a Final Skills Assessment?

Associated WO Number

Task Prep

1. Reviewed the work order for building location and contact.
Pass Fail NA

2. Assembled the tools needed for the job.
Pass Fail NA

3. Contacted the customer and inform them of your estimated arrival time.
Pass Fail NA

Task Performance

4. Put on required PPE.
Pass Fail NA

5. Closed shut off valve(s) to fixture.
Pass Fail NA

History Duplicate Close Save

7. Enter the Associated WO Number. This is the Work Order Number assigned to the Mentor. If there is not an existing work order, one will need to be created to record the training task.

Work Order 4350382

Procedures

Facilities Maintenance Task C.08: Replace Supply Lines

OJT-FM01-HRUBEC 2 - OJT Facilities Maintenance Series - Debbie Hrubec - Medical Center - Off Site Facilities - 650 Ackerman - 01st Floor - ...

Are you completing this form to record the Mentee's Observation Only, Observation & Practice, Practice Only or to conduct an evaluation for a Final Skills Assessment?

Associated WO Number

Task Prep

1. Reviewed the work order for building location and contact.
Pass Fail NA

2. Assembled the tools needed for the job.
Pass Fail NA

3. Contacted the customer and inform them of your estimated arrival time.
Pass Fail NA

Task Performance

4. Put on required PPE.
Pass Fail NA

5. Closed shut off valve(s) to fixture.
Pass Fail NA

History Duplicate Close Save

- Follow each procedure during training instruction and/or mentee training performance. For each required procedure select Pass, Fail, or NA (NA=Observation).

*Note: The last question is for determining the OJT Assessment Evaluation. If performing a training session involving Observation, Observation & Practice, and Practice select **NA** for the final assessment question.*

Work Order 4350382

Facilities Maintenance Task C.08: Replace Supply Lines

OJT-FM01-HRUBEC.2 - OJT Facilities Maintenance Series - Debbie Hrubec - Medical Center - Off Site Facilities - 650 Ackerman - 01st Floor --

Are you completing this form to record the Mentee's Observation Only, Observation & Practice, Practice Only or to conduct an evaluation for a Final Skills Assessment?

Associated WO Number

Task Prep

1. Reviewed the work order for building location and contact. **8.**
Pass Fail NA

2. Assembled the tools needed for the job.
Pass Fail NA

3. Contacted the customer and inform them of your estimated arrival time.
Pass Fail NA

Task Performance

4. Put on required PPE.
Pass Fail NA

5. Closed shut off valve(s) to fixture.
Pass Fail NA

History Duplicate Close Save

For the final OJT Assessment, Mentees must satisfactorily complete each step independently within each category: Task Preparation, Task Performance, Task Completion under the observation of the Mentor and Supervisor/Manager.

- Once the OJT final assessment is completed, select the appropriate result: Pass, Fail, or NA.

9

Note: If the Mentee successfully completes the OJT Assessment, the Task will drop from the work order requirements for OJT-Assessment. Otherwise, it will remain until the Mentee successfully completes the task.

10. Scroll to the bottom of the screen, select "Complete."
11. Enter the completion date by clicking on the calendar icon.
12. Add any additional comments if needed.
13. Click on Save and close the work order.

