Vanderbilt University Medical Center

Credentials Application Tracking System

User’s Guide
# Table of Contents

Table of Contents ......................................................................................................................................................... 2

Document Change History .......................................................................................................................................... 2

How to Use this Guide ................................................................................................................................................. 4

Need Help? ................................................................................................................................................................... 4

What is CATS? ............................................................................................................................................................. 4

What is Required to Use CATS and How Do I Request Access? ................................................................. 4

How Do I Get to CATS? .............................................................................................................................................. 5

Managing Department Assistants ............................................................................................................................... 7

Selecting a Staff Member Listing .............................................................................................................................. 11

Filtering and Sorting a Staff Member List ................................................................................................................. 14

Updating the Patient Care Flag on the Staff Member List ...................................................................................... 18

Hiding Staff Members on the Staff Member List ................................................................................................. 22

Accessing Credentials and Job Experience from the Staff Member List............................................................. 23

Managing Licensures ................................................................................................................................................. 24

Managing Certifications ........................................................................................................................................ 33

Managing Degrees ................................................................................................................................................... 41

Running Credentials Reports ................................................................................................................................ 43

Managing Experience and Reviewing Experience when a Job Change Occurs ............................................. 46

Running Years of Experience Reports ..................................................................................................................... 56

Appendix A: Vanderbilt Credentials Verification Process and Policies ............................................................ 58

Appendix B: Other Important Notes ....................................................................................................................... 59

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# Document Change History

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How to Use this Guide

This Credentials Application Tracking System User’s Guide is designed to help authorized staff use the Credentials Application Tracking System (CATS) to track and manage staff credentials and experience for medical center staff. The guide includes information on adding and managing licensure, certification, degree, and experience information in CATS. Each section contains a summary of steps for each process and the corresponding CATS screenshots.

Need Help?

If you encounter problems with CATS after following the guidelines in this document, or if you have suggestions for improvement, please email human.resources.vumc@vanderbilt.edu.

What is CATS?

CATS is a web application used by Vanderbilt University Medical Center (VUMC) to capture and track staff credentials and job experience. The application allows Vanderbilt department managers, PAF responsible staff, and department assistants to manage licensure, certification, degree, and experience information for their staff in a centralized database via a web-enabled application. The primary focus is the capture of credentials and experience for nursing staff as well as other clinical related jobs. The application can be accessed as a stand-alone application or by supervisors from a Vanderbilt Performance Evaluation System (VPES) pay for performance evaluation.

In addition to being used for day to day management of staff credentials, CATS information is retrieved by other systems for use in various processes. The VandyWorks scheduling system uses CATS licensure and certification expiration information when determining whether a staff member can be scheduled. CATS license information is also used to identify nursing staff for the purpose of granting access and permissions while using clinical applications such as StarPanel, RxStar, etc.

What is Required to Use CATS and How Do I Request Access?

You will need the following before you can use CATS:

1. A VUNET ID and ePassword.
   - If you have forgotten your ePassword, go to the following website and follow the instructions for recovery: [https://jprod.its.vanderbilt.edu/apps1/its-epassword/personInfo.html](https://jprod.its.vanderbilt.edu/apps1/its-epassword/personInfo.html).
2. If you do not have an ePassword, go to the following website and follow the instructions listed: [http://its.vanderbilt.edu/epassword/](http://its.vanderbilt.edu/epassword/).
3. Security access to use CATS. This is granted by being listed as a department manager or PAF responsible for a department in PeopleSoft, or as a department assistant for a department within CATS.
If you are currently listed as a PeopleSoft department manager or PAF responsible, you will have access to CATS in those roles. If changes need to be made for either role, please make changes on the department change form at the following link: https://forms.vanderbilt.edu/view.php?id=221289. Please note, these roles are not specific to CATS and any assignment changes made may affect access to other systems, reports, etc. that may use those role designations.

Department assistant access can be granted per home department by the department manager or PAF responsible listed in PeopleSoft. This can be done within CATS using the Manage Department Assistants feature available through the Administration link.

4. Internet Explorer version 8.0 or higher, running on a Windows operating system.

   - The CATS application is optimized for Internet Explorer version 8 running on a Windows platform. Note that Internet Explorer version 7.0 can be used, but is not recommended.
   - If you are using Internet Explorer 7.0 or higher, please see Appendix B for information on suppressing a warning message that may occur when deleting licenses, certifications, or degrees.
   - If there is a problem with your web browser, please contact your LAN manager or local technical support person for assistance.

How Do I Get to CATS?

Follow the steps below to login to CATS:

1. Access the CATS website via the following URL: https://webapp.mis.vanderbilt.edu/cats/. Enter your VUNET ID and ePassword on the login page and click the Login button.
2. Before accessing the system, the verification agreement must be reviewed and accepted. Review the agreement. Click **OK** to accept the agreement and continue with the login. Click **Cancel** to decline the agreement; login will be denied.
Managing Department Assistants

Department assistants are staff members requiring access to manage credentials and experience information on behalf of the department manager and/or PAF responsible. Assistants are assigned by department within CATS and can be updated by the PAF responsible or department manager. Note: there is a limit to the number of assistants that can be assigned to departments. This may be adjusted by CATS administrators as needed.

Follow the steps below to manage assistants in CATS:

1. Click the **Administration** link and then click the **Administer Department Assistants** link.

2. To view department assistants assigned to a department number (manage by department):
   - Click on the **Department** radio button to view the list by department.
   - A list of departments with active staff is displayed. The list is limited to those that the current user is authorized to access.
Click on the department name to view a list of assistants assigned to the department. Note that the manager and PAF responsible are as listed in PeopleSoft are provided for reference purposes and can only be changed in PeopleSoft.

To add assistants:

- Click in the Add Employee ID box and enter the employee ID of the individual to be added.
- Click the Find Staff Member button to search for the person.
- The employee's name and department number will appear. Confirm you have identified the correct staff member.
- Click on Add Staff to add the person as an assistant.
The assistant will be listed under the **Assistants** section of the page. Repeat the same process to add another assistant to the department. Note that when the maximum number of assistants is met a message will be displayed and you can no longer add assistants for that department.

To delete an assistant when managing by departments:

- Click on the trash can (delete) icon beside the staff member to be deleted.
- Click **OK** to confirm.

3. To manage the list by department assistant instead of department:

- Click on **Manage Assistants** to open the **Administer Department Assistants** page, and click on the **Assistant** radio button to view the list by assistant.
The list of assistants will be displayed.

Click on the department assistant’s name to see the list of departments to which the person is assigned. All departments that the person is assigned to will be listed, however you can only manage those department where you are listed as a PAF responsible or department manager.

To add departments to an assistant when managing by assistant:
- Click in the Add Department Number box and enter the department number for the assistant to be added.
- Click the Find Department button to search for the department. Note: you can only add departments for which you are listed as the PAF responsible or department manager.
- The department name and number will appear.
- Confirm you have identified the correct department.
- Click on **Add Department** to add the department for the assistant.

- The department will be listed under the **Departments** section of the page.

- Repeat the same process to add another department for the assistant.

- To delete a department when managing by assistants:
  - Click on the trash can (delete) icon beside the department number, then click **OK** to confirm

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**Selecting a Staff Member Listing**

Upon initial login to CATS, the list of departments for which you are authorized to access is displayed. You can choose to view staff lists by department (the default) or view by staff member (view all staff). Once a list is displayed, it can be filtered and sorted to find a staff member or set of staff members.
**Viewing Staff Members by Department**

To view staff members by department:

1. Click on the *View Departments* link on the left side of the page to open the *Departments Managed or Administered* page. A list of your departments with active staff members is displayed. Note: this page is displayed by default when logging into CATS.

2. If needed, the list of departments can be sorted by either department number or department name.
   - Click the *Department ID* link at the top of the list to sort the list in ascending order by department number. Click the link again to sort the list in descending order by department number.
   - Click the *Department Name* link at the top of the list to sort the list in ascending order by department name. Click the link again to sort the list in descending order by department name.
3. Click on the name of the department to view a list of active staff members in the department. The Staff Members for Department page is displayed and the staff members are listed along with their statuses and patient care flag settings.

Viewing All Staff Members

To view the All Staff Members List:
1. Click on the **View All Staff** link on the left side of the page to view a list of active staff. The **Staff Members for All Managed Departments** page is displayed and the staff members are listed, along with their statuses and patient care flag settings.

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**Filtering and Sorting a Staff Member List**

Once you have selected the staff member listing, it can be filtered and sorted as needed. The list can be filtered by the following: Patient Care Flag, Last Name or Employee ID, and Hidden Flag. These options can be combined to narrow the search. The list can be sorted by Experience Key, Licensure Key, Certification Key, Employee ID, and Name.
Filtering the Staff Member List

Follow the steps below to filter or sort a staff list:

1. Select one or more of the filter options at the top of the staff member list page using the guidelines below:
   - Patient Care Flag: select the patient care flag from the Search filter. For more information on the patient care flag, see the Updating the Patient Care Flag on the Staff Member List section of this document.
     - All – lists all staff members regardless of the patient care flag
     - Indirect – lists all staff members with a patient care flag equal to indirect
     - Direct – lists all staff members with a patient care flag equal to direct
     - Administrator – lists all staff members with a patient care flag equal to administrator
     - NA – lists all staff members with a patient care flag equal to NA
     - Choose One – lists all staff members who are new to the database and have not had the patient care flag updated
   - Last Name or Employee ID: select Last Name or Employee ID from the Staff By filter.
     - Enter search criteria for the selected filter option in the Similar To field
     - If Last Name is selected:
       - % or * can be used as a wild card when searching. For example, searching for ‘%ezg%’ returns ‘Mezger’
       - The first name can be included in the search. Enter the last name and first name separated by a comma with no spaces. (For example, to search for ‘Nancy Brown’, enter ‘brown,n’ in the search criteria. All staff members with a last name of ‘Brown’ and a first initial of ‘N’ are returned)
     - If Employee ID is selected:
       - An exact employee ID match must be found (Wildcards cannot be used)
Hidden Flag: select the Hidden Flag from the Display Options filter.

- **Show All** – lists all staff members.
- **Do not Show Hidden Faculty/Staff** – lists all staff members with a hidden flag equal to N (If a staff member’s patient care flag has not been updated, the staff member will be included in the results)
- **Only Show Hidden Faculty/Staff** – lists all staff members with a hidden flag equal to Y (If a staff member’s patient care flag has not been updated, the staff member will be included in the results)

2. Click the **Search Now** button to complete the search and display the results on the page.
3. Click the **Clear Search** button to restore the default staff list and complete another search.

### Sorting the Staff Member List

The staff member list can be sorted by any column with a header that is a blue link. Click on the link at the top of the column to sort the list in ascending order by the column contents. Click the link again to sort the contents in descending order. The following sort options are available:

1. **Exp. Key** – the experience status column can be used to determine the status of a staff member’s experience information. Click on one of the experience status boxes on the page to see the status definitions. Alternately, see the [Updating Years of Experience](#) section of this document for definitions. The list is ordered as follows when sorted in ascending order: red, yellow, green, gray, no status.

2. **Lic. Key** – the licensure status column can be used to determine the status of a staff member’s licensure information. Click on one of the licensure status boxes on the page to see the status definitions. Alternately, see the [Updating Licensures](#) section of this document for definitions. The list is ordered as follows when sorted in ascending order: red, yellow, green, gray, no status.

3. **Cert. Key** – the certification status column can be used to determine the status of a staff member’s certification information. Click on one of the certification status boxes on the page to see the status definitions. Alternately, see the [Updating Certifications](#) section of this document for definitions. The list is ordered as follows when sorted in ascending order: red, yellow, green, gray, no status.
4. Emp. ID – sorts the list by employee ID.
5. Name – sorts the list by staff member last name.

**Updating the Patient Care Flag on the Staff Member List**

A staff member’s patient care flag must be updated before credential or experience updates can be made. A staff member requires a patient care flag update if the employment record is new to the database. If a staff member is new, the patient care flag will be defaulted to Choose One. In addition, none of the status boxes will be displayed and the credentials or experience for the staff member cannot be accessed. Once the patient care flag is updated for a person, the experience, licensure, and certification status boxes will appear. The staff member name becomes a link that can be clicked to access the credentials and experience.
The patient care flag must be updated for new staff as they are added to CATS. It should also be updated if there is a job change that results in a change in patient care. Follow the steps below to update the patient care flag for staff members:

1. Open the staff member listing page.
2. To filter the list to only those staff members that have not yet had a patient care flag update, select the **Choose One** option from the **Search** filter at the top of the page and click **Search Now**. Staff members that have not yet had a patient care flag update are displayed on the screen. Only the first 10 staff members will be displayed on the screen.
3. All staff members listed on the screen can be updated at the same time.
   - Select the patient care flag for each staff member on the page using the guidelines provided below.

**For Nursing Jobs:**
- Select the patient care flag for each staff member on the page using the guidelines provided below:
  - **Direct Care**: Direct Care Nurse. The nurse providing care directly to patients and excludes the nurse manager and nurse executive. Direct patient care responsibilities are patient-centered nursing activities carried out in the presence of the patient (such as, admission, transfer/discharge, patient teaching, patient communication, etc.). This category includes nursing staff that are:
• Counted in the staffing matrix
• Assigned greater than 50 percent to direct care responsibilities
• Replaced during a shift if they call in sick

- **Indirect Care:** Indirect Care Nurse. Nurses whose primary focus is patient care responsibilities and/or contact, but who have “hands on” less than 50 percent of their time (This category would include educators, charge nurses, advanced practice nurses, case managers, etc.)

- **Administrator:** Administrator Nurse. Nurses whose primary responsibility is the management of healthcare services delivery (The levels of nurse administrators include, nurse executive (CNO), nursing administrative and assistant administrative directors, nurse directors, nurse managers and assistant managers)

**For Other Licensed, Clinical Jobs:**

- **Direct Care:** Direct Care. The direct patient care provider cares directly to patients and excludes the manager and administrator. Direct patient care responsibilities are patient-centered activities carried out in the presence of the patient (such as, admission, transfer/discharge, patient teaching, patient communication, etc.). This category includes staff that are:
  • Counted in the staffing matrix
  • Assigned greater than 50 percent to direct care responsibilities
  • Replaced during a shift if they call in sick

- **Indirect Care:** Staff whose primary focus is patient care responsibilities and/or contact, but who have “hands on” less than 50 percent of their time (This category would include educators, charge nurses, case managers, etc.)

- **Administrator:** Staff whose primary responsibility is the management of healthcare services delivery (The levels of administrators include, nursing administrative and assistant administrative directors, directors, managers and assistant managers)

- **NA:** Any staff member whose job is not applicable to clinical operations

➢ Click the **Save** button at the bottom of the page to save all changes.
Complete the steps again for the remaining staff members that require update. Use the Next Page link at the bottom of the page to view additional staff members that may require update.

4. Once the patient care flag is updated, the experience, licensure, and certification status boxes appear. The employee name becomes a link that can to access the staff member credentials and experience.
Hiding Staff Members on the Staff Member List

CATS provides an option to hide staff members if, for example, credentials or experience does not need to be tracked for a person. Each staff member on the list has a hide option. Once the hidden flag is set, then the staff member can be hidden or displayed on the page using the Display Options filter at the top of the staff member listing. This field is used for list management purposes only. Note that the hide setting is not user specific and will apply to any user viewing the staff member.

Follow the steps below to update the hidden flag for a staff member and apply a filter to hide or display the staff member:

Updating the Hidden Flag

1. Open the staff member list page.
2. All staff members listed on the screen can be updated at the same time.
   - Select the hidden flag for each staff member on the page by selecting a choice from the Hide Field.
     - N – Staff member is displayed when applying the Do Not Show Hidden Faculty/Staff display options filter (Staff member is not displayed when using the Only Show Hidden Faculty/Staff option)
     - Y – Staff member is hidden when applying the Do Not Show Hidden Faculty/Staff display options filter (Staff member is displayed when using the Only Show Hidden Faculty/Staff option)
   - Click the Save button at the bottom of the page to save all changes on the page.
   - Complete the steps again for the remaining staff members as needed. Use the Next Page link at the bottom of the page to view additional staff members that may require update.
Hiding Staff Members Using the Display Options Filter

1. Open the staff member listing page.
2. Apply a filter to the listing. See the Filtering the Staff Member Listing section of this document for more details.
   - Select the Do Not Show Hidden Faculty/Staff filter from the Display Options to list staff members that are not hidden (hidden flag is set to N).
   - Select the Only Show Hidden Faculty/Staff from the Display Options to list staff members that are hidden (hidden flag is set to Y).
3. Click the Search Now button to apply the filter and display the results on the page.
   - Note that if a staff member’s patient care flag has not been updated the staff member will be included in the results regardless of the filter selected.

Accessing Credentials and Job Experience from the Staff Member List

After a patient care flag has been updated, the staff member’s credentials and experience can be viewed and updated. Follow the steps below to view the credentials and job experience for a staff member.

1. Click on the name of the staff member on the staff member list page to access the associated Credentials page.
2. Licensures, certifications, and degrees can be viewed and updated on the **Credentials** page. Scroll down to view the degree information on the page. Note that the update of credentials will be limited based on the security access provided to the user.

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3. The **Years of Experience** link on the left of the **Credentials** page can be used to access the **Years of Job Experience** page for the staff member. Years of experience related to the current job can be viewed and updated from the **Years of Job Experience** page.

4. Click on the **Return to Staff View** link in the left pane to return to the staff member listing from the **Credentials** page or **Years of Experience** page.

### Managing Licensures

Authorized CATS users can view the status of staff member licensures, as well as add, renew, and delete licensure records. Outlined below are the guidelines for viewing licensure status and managing licensure information. [Appendix A](#) contains Vanderbilt's credentials verification process and policies.
Viewing Licensure Status on the Staff Member Listing

The status of staff member licensures is available on the staff member listing page. The status of a licensure is indicated by a colored box in the **Lic.Key** column of the staff member listing page. Click on the **Lic Key** column header to sort the staff member listing by licensure status. Outlined below are the licensure statuses and definitions. Click on a licensure status box at any time from within CATS to view these definitions.

1. **Green**: All Licensures for the Faculty/Staff Member are current. No licensures are set to expire in the next 30 days.
2. **Yellow**: Faculty/Staff Member has at least one Licensure that expires in the next 30 days.
3. **Red**: Faculty/Staff Member has at least one Licensure that has expired.
4. **Gray**: No Licensures are listed for the Faculty/Staff Member.
5. **No status**: Patient care flag needs to be updated for the Faculty/Staff Member.

Adding Licensures

Licensures can be updated from the **Credentials** page. Follow the steps below to add a new licensure. See **Appendix A** for the license verification policy and guidelines.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member. If the name is not a link that can be clicked, update the patient care flag for the staff member. See the Updating the Patient Care Flag on the Staff Member Listing section of this document for details.
3. On the **Credentials** page, click the **Add Licensure** button.
4. Upon clicking **Add Licensure**, you are taken to the **Search for a License** page to select the license type. Options to search by professional category and/or name are available. You can also view the entire list.

   - To use a search option as opposed to viewing the entire list, click the **Search** radio button at the top of the page. This is the default option. You can search by professional category, license name, or both:
     - Select one or more of the professional categories in the **Search by Professional Categories** section of the page
     - Enter search criteria in the **Search by Name** section of the page (Note: the search is a pattern match search. For example, a search for ‘nurse’ will return any license with nurse in the name)
     - Click the **Search** button to return licenses matching the search criteria entered
     - Click on the **Name** or **Professional Category** headers to re-sort the results as needed
     - Click the **Select** link next to the license to be added

   - Alternately, to view the entire list of licenses, click the **Show All** radio button at the top of the page.
     - The list of licenses will be displayed
• Click the Name or Professional Category headers to re-sort the results as needed
• Click the Select link next to the license to be added

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Licensure Update and Renewal Guidelines

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<tr>
<td></td>
<td>• If the license is being renewed, the new date must be after the previous</td>
</tr>
<tr>
<td></td>
<td>expiration date</td>
</tr>
<tr>
<td>Comments</td>
<td>• Enter any notes about the license</td>
</tr>
<tr>
<td>Source Verification Date</td>
<td>• Enter the date that the license was verified with the primary source</td>
</tr>
<tr>
<td></td>
<td>• Date defaults to the current date</td>
</tr>
<tr>
<td>Verification Source</td>
<td>• Select the source that was used to verify the license information</td>
</tr>
</tbody>
</table>

6. Click the **Save Changes** button to save the license or **Cancel** to cancel adding the license. If the license is saved, the **Credentials** page is displayed and the new license is added to the page.

**Add License**

- **Type**: Clinical Perfusionist
- **State**: TN
- **License Number**: 12345
- **Expiration Date**: 1/31/2015
- **Comments**: This is my comment

**Source Verification**

Any active license or Tennessee temporary permit should be verified by primary source verification through TN Health Related Boards or through automated telephone verification at 1-800-778-4123.

- **Verification Date**: 1/13/2014
- **Verification Source**: State Website

Renewing Licensures

Follow the steps below to renew a licensure. See **Appendix A** for the license verification policy and guidelines.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. On the **Credentials** page, click the corresponding renew icon for the license to be renewed.

4. A new license record is displayed containing information from the selected record. Follow the guidelines in the **Licensure Update and Renewal** table above when updating the license information. Note that only the expiration date, source verification date, and comments are updated on a renewal.
5. Click the **Save Changes** button to save the renewed license or **Cancel** to cancel renewing the license. If the license is saved, the **Credentials** page is displayed and the renewed license is added to the page. The old license will no longer appear.

![License Information]

**Documenting Source Verification for a License**

Source verification provides the user the ability to document the source that was used to validate the license information along with the date that the source verification was completed. Source verification is completed when licenses are created or renewed, and can also be done outside of the creation or renewal of a license. Follow the steps below to document source verification for a license outside of the normal create and renewal actions.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. Click on the **✓** button in the **Source Verification** column corresponding to the license requiring update.
4. The edit license page is displayed to enter the source verification information.
5. Enter the **Verification Date** and select the **Verification Source**. Click **Save** to save the changes, and return to the **Credentials** page. Alternately, click **Cancel** to cancel the changes.
Viewing Licensure Renewal and Source Verification History

The renewal and source verification history of a license is kept in the CATS database for each staff member and is retained for audit purposes. Follow the steps below to view the history for a license.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. Click on the blue link for the **License Type** to view the renewal history for the selected license. The **Licensure History** page for the selected license is displayed. The renewal history is sorted by expiration date on the page.
4. Click on the plus sign (+) next to the Source Verification Date to view the verification history.

5. Click on the Employee Credentials link on the left side of the page to return to the staff member’s credentials page.

**Editing Licensures**

Once a license record is created, a limited set of information can be updated. Follow the steps below to edit a licensure.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.  
3. Click on the **Edit** icon corresponding to the license requiring update.

4. The edit license page is displayed. The following can be edited on this page:
   - Comments
   - Delete source verification records
   - Add new source verification

5. Make the changes as needed and click **Save** to save the changes, and return to the **Credentials** page. Alternately, click **Cancel** to cancel the changes.

### Deleting Licensures

Follow the steps below to delete a licensure.

1. Open the staff member listing page.  
2. Click on the name of the staff member to open the **Credentials** page for the staff member.  
3. Click on the corresponding trashcan (delete) icon next to the license to be deleted. If you are using Internet Explorer 7.0 or higher, please see [Appendix B: Other Important Notes](#) for information on suppressing a warning message that may occur when deleting licenses.
4. Click **OK** to confirm.

5. A prompt will appear in the upper left corner of the page to enter a reason for deletion. Enter a reason in the popup and click **OK** to continue. The **Credentials** page is then displayed and the license is removed from the page. Alternately, click **Cancel** on the confirmation or reason for deletion screen to cancel.

---

**Managing Certifications**

Authorized CATS users can view the status of staff member certifications, as well as add, renew, and delete certification records. Outlined below are the guidelines for viewing certification status and managing certification information. **Appendix A** contains Vanderbilt's credentials verification process and policies.

**Viewing Certification Status on the Staff Member Listing**

The status of staff member certifications is available on the staff member listing page. The status of a certification is indicated by a colored box in the **Cert. Key** column of the staff member listing page. Click on the **Cert. Key** column header to sort the staff member listing by certification status. Outlined below are the certification statuses and definitions. Click on a certification status box at any time from within CATS to view these definitions.
1. Green: All Certifications for the Faculty/Staff Member are current. No certifications are set to expire in the next 30 days.

2. Yellow: Faculty/Staff Member has at least one Certification that expires in the next 30 days.

3. Red: Faculty/Staff Member has at least one Certification that has expired.

4. Gray: No Certifications are listed for the Faculty/Staff Member.

5. No status: Patient care flag needs to be updated for the Faculty/Staff Member.

Adding Certifications

Certifications can be updated from the Credentials page. See Appendix A for certification verification policy and guidelines. Follow the steps below to add a new certification:

1. Open the staff member listing page.

2. Click on the name of the staff member to open the Credentials page for the staff member. If the name is not a link that can be clicked, update the patient care flag for the staff member. See the Updating the Patient Care Flag on the Staff Member Listing section of this document for details.

3. On the Credentials page, click the Add Certification button.
4. Upon clicking *Add Certification*, the *Search for a Certification* page is displayed to select the certification type. Options to search by professional category and/or name are available. You can also view the entire list.

   - To use a search option as opposed to viewing the entire list, click the *Search* radio button at the top of the page. This is the default option. You can search by professional category, certification name, or both:
     - Select one or more of the professional categories in the *Search by Professional Categories* section of the page
     - Enter search criteria in the *Search by Name* section of the page. (Note: the search is a pattern match search. For example, a search for ‘nurse’ will return any certification with nurse contained in the name)
     - Click the *Search* button to return certifications matching the search criteria entered
     - Click on the *Name* or *Professional Category* headers to re-sort the results as needed
     - Click the *Select* link next to the certification to be added

   - Alternately, to view the entire list of certifications, click the *Show All* radio button at the top of the page.
     - The list of certifications will be displayed
     - Click on the *Name* or *Professional Category* headers to re-sort the results as needed
     - Click the *Select* link next to the certification to be added
5. After selecting the certification type, a page to complete the remaining certification information is displayed. Complete the fields using the guidelines provided in the Certification Update and Renewal Guidelines table below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>• Selected from the Search for a Certification page&lt;br&gt;• Click the Change link next to the certification type to change it when adding a new record&lt;br&gt;• The type cannot be changed when renewing</td>
</tr>
<tr>
<td><strong>Expiration Date</strong></td>
<td>• Enter the expiration date in MM/DD/YYYY format&lt;br&gt;• If the certification is being renewed, the new date must be after the previous expiration date</td>
</tr>
<tr>
<td><strong>Initial Month/Year Received</strong></td>
<td>• If the certification is a national certification, then the initial month and year in which the certification was received must be entered. If the certification is not a national certification, nothing has to be entered for this field&lt;br&gt;• Enter the month and year in MM/YYYY format</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>• Enter any notes about the certification</td>
</tr>
<tr>
<td><strong>Source Verification Date</strong></td>
<td>• Enter the date that the license was verified with the primary source&lt;br&gt;• Date defaults to the current date</td>
</tr>
<tr>
<td><strong>Verification Source</strong></td>
<td>• Select the source that was used to verify the certification information</td>
</tr>
</tbody>
</table>
6. Click the **Save Changes** button to save the new certification or **Cancel** to cancel adding the new certification. If the certification is saved, the **Credentials** page is displayed and the new certification is added to the page.

### Add Certificate

<table>
<thead>
<tr>
<th>Type</th>
<th>BLS Provider</th>
<th>Change Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expiration Date</td>
<td>1/31/2015</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>These are some comments</td>
<td></td>
</tr>
</tbody>
</table>

### Source Verification

| Verification Date | 1/13/2014 |
| Verification Source | Professional Website |

### Renewing Certifications

Follow the steps below to renew a certification. See **Appendix A** for the certification policy and guidelines.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. On the **Credentials** page, click the corresponding renew icon for the certification to be renewed.

### Certifications

<table>
<thead>
<tr>
<th>Type</th>
<th>Expiration Date</th>
<th>Source Verification Date</th>
<th>Initial Mo/Year Received</th>
<th>Renew</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACLS Provider</td>
<td>04/30/2014</td>
<td>04/05/2012</td>
<td>Not Rec'd</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Certified Oncology Nurse</td>
<td>12/31/2014</td>
<td>08/23/2013</td>
<td>12/2010</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. A new certification record is displayed on the page containing information from the selected record. Follow the guidelines in the **Certification Update and Renewal** table above when updating the certification information. Note: only the expiration date, source verification date, and comments are updated on a renewal.

5. Click the **Save Changes** button to save the renewed certification or **Cancel** to cancel the renewal. If the certification is saved, the **Credentials** page is displayed and the renewed certification is added to the page. The old certification will no longer appear.
Documenting Source Verification for a Certification

Source verification provides the user the ability to document the source that was used to validate the certification information along with the date that the source verification was completed. Source verification is completed when certifications are created or renewed, and can also be done outside of the creation or renewal of a certification. Follow the steps below to document source verification for a certification outside of the normal create and renewal actions.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. Click on the ✔️ button in the **Source Verification** column corresponding to the certification requiring update.
4. The edit certification page is displayed to enter the source verification information.
5. Enter the **Verification Date** and select the **Verification Source**. Click **Save** to save the changes, and return to the **Credentials** page. Alternately, click **Cancel** to cancel the changes.
Viewing Certification Renewal and Source Verification History

The renewal and source verification history of a certification is retained in the CATS database for each staff member for audit purposes. Follow the steps below to view the history for a certification:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. Click on the blue link for the **Certification Type** to view the renewal history for the selected certification.
   
The **Certification History** page for the selected certification is displayed sorted by expiration date.

4. Click on the plus sign (+) next to the Source Verification Date to view the verification history.

5. Click on the **Employee Credentials** link on the left side of the page to return to the staff member's credentials page.
**Editing Certifications**

Once a certification record is created, a limited set of information can be updated if needed. Follow the steps below to edit a certification:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. Click on the **Edit** icon corresponding to the certification requiring update.

4. The edit certification page is displayed. The following can be edited on this page:
   - Comments
   - Initial Month/Year Received
   - Delete source verification records
   - Add new source verification

5. Make the changes as needed and click **Save** to save the changes, and return to the **Credentials** page. Alternatively, click **Cancel** to cancel the changes.

**Deleting Certifications**

Follow the steps below to delete a certification:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. Click on the corresponding trashcan (delete) icon next to the certification to be deleted. If you are using Internet Explorer 7.0 or higher, please see Appendix B: Other Important Notes for information on suppressing a warning message that may occur when deleting certifications.

<table>
<thead>
<tr>
<th>Delete</th>
<th>Edit</th>
<th>Renew</th>
<th>Source Verification</th>
<th>Type</th>
<th>Expiration Date</th>
<th>Source Verification Date</th>
<th>Initial Mo/Year Received</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>✓</td>
<td>ACLS Provider</td>
<td>10/31/2014</td>
<td>11/08/2012</td>
<td>Not Req’d</td>
<td></td>
</tr>
<tr>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>✓</td>
<td>BLS Provider</td>
<td>04/29/2015</td>
<td>04/29/2013</td>
<td>Not Req’d</td>
<td></td>
</tr>
</tbody>
</table>

4. Click **OK** on the confirmation prompt to continue with the deletion.

5. A prompt will appear to enter a reason for deletion. Enter a reason in the popup and click the **OK** button to continue. The Credentials page is displayed and the certification is removed from the page. Alternately, click **Cancel** on the confirmation or reason for deletion to cancel.

---

**Managing Degrees**

Authorized CATS users have the ability to add and delete degree records. Outlined below are the guidelines for managing degree information. Appendix A contains Vanderbilt degree verification process and policies.

**Adding Degrees**

Degrees can be updated from the Credentials page. See Appendix A for guidelines on the policy and guidelines for degree verification. Follow the steps below to add a new degree:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the Credentials page for the staff member. If the name is not a link that can be clicked, update the patient care flag for the staff member. See the Updating the Patient Care Flag on the Staff Member Listing section of this document for details.
3. On the **Credentials** page, click the **Add Degree** button.

4. An empty degree record is displayed on the page for update. Complete the fields using the guidelines provided in the **Degree Update Guidelines** table below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Select the degree type from the drop down list</td>
</tr>
<tr>
<td>Focus</td>
<td>Select the focus from the list</td>
</tr>
<tr>
<td>Initial Degree Year</td>
<td>Enter the year that the degree was received in YYYY format</td>
</tr>
<tr>
<td></td>
<td>Only numbers can be entered</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any notes about the degree</td>
</tr>
</tbody>
</table>

5. Click the **Save Changes** button to save the new degree or **Cancel** to cancel adding the new degree. If the degree is saved, the **Credentials** page is displayed and the new degree is added to the page.

**Editing Degree Comments**

Once a degree record is created, the comments can be updated. Follow the steps below to edit a comment:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. Click on the **Edit** icon corresponding to the degree comments requiring update.
4. The edit degree page is displayed. Update the comments, click Save to save the changes, and return to the Credentials page. Alternately, click Cancel to cancel the changes and return to the page.

Deleting Degrees

Follow the steps below to delete a degree:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the Credentials page for the staff member.
3. Click on the corresponding trashcan (delete) icon next to the degree to be deleted.

4. Click Yes to confirm.

5. The Credentials page is displayed and the degree is removed from the page. Alternately, click No on the confirmation screen to cancel.

Running Credentials Reports

Authorized CATS users can run reports on staff member’s licensure, certification, and degrees. When logging into CATS, there is a Reports option on the left side of the page. Click on the link to access the CATS reports.
Follow the steps below to run a Credentials report. The report will automatically default to Credentials Report.

1. Choose one or all of the criteria to be included in the report: patient care flag, licensure, certification or education.

2. Enter the department numbers to be included in the report. Separate department numbers with a comma. The default will include all departments unless otherwise specified.

3. Enter the job codes to be included in the report. Separate job codes with a comma. The default will include all job codes unless otherwise specified.

4. Select whether to include department responsible information in the report. If department responsible information is included, the employee ID and name for each of the following roles will be included for each record: department manager, PAF responsible, and department assistant(s).

5. The report will be output to an Excel spreadsheet unless changed to HTML output in the Generate report as option. Note: If HTML output is chosen, the report cannot be edited.

6. Select Generate Report to run the report.
7. If the report was generated in Excel, you will have the option to ‘Open’ or ‘Save’ the report. If saved, it is recommended that the report be saved to the local computer with a unique name.
Managing Experience and Reviewing Experience when a Job Change Occurs

Authorized CATS users can add, update, and delete years of experience records for staff members. Experience information is captured to determine the amount that applies to the staff member’s current job. Experience information should be added as well as reviewed when there are job changes in the PeopleSoft HR system that could affect the experience. Outlined below are the guidelines for managing years of experience information as well as for reviewing experience information when there is a job change.

Viewing Years of Experience Status on the Staff Member Listing

The status of staff member’s years of experience is available on the staff member list page. The experience status is indicated by a colored box in the Exp. Key column of the staff member listing page. Click on the Exp. Key column header to sort the staff member listing by years of experience status. Outlined below are the experience statuses and definitions. Click on an experience status box at any time from within CATS to view these definitions.

1. Green: Faculty/Staff Member's job code is tracked for years of experience, has job experience entered, and no review is needed.
2. Yellow: Faculty/Staff Member's job code is tracked for years of experience, has job experience entered, and review is needed. This review is required because a change in job data has been detected.
3. Red: Faculty/Staff Member's job code is tracked for years of experience and has no job experience entered. Experience information needs to be entered for the staff member.
4. Gray: Faculty/Staff Member's job code is not tracked for years of experience. An experience update is not required.
5. No status: Patient care flag needs to be updated for the Faculty/Staff Member.
**Viewing Years of Experience Summary Information**

The summary of a staff member's years of experience is available on the staff member's years of experience page. Follow the steps below to access the years of experience summary for a staff member:

1. Open the staff member listing page. Click on the name of the staff member to open the Credentials page for the staff member.

2. Click on the Years of Experience link on the left side of the page to view the Years of Experience Summary page for the staff member.
3. The **Years of Experience Summary** page lists all past experience and current experience for the staff member. All previous job experience has a start date and end date entered. One record without an end date should be entered to capture the experience for the current job. The current record is displayed on the summary page with *Current* for the end date.

![Years of Job Experience for Adams, Kathryn L (0076313) Job: Specialty Nurse (6691) table]

4. Click the *Return to Credentials* link on the left side of the page to return to the staff member’s *Credentials* page.

Outlined below in the **Years of Experience Summary Page Information** table is a list of the fields on the summary page along with their definitions. See the *Adding Years of Experience* section of this document for information on how to create an experience record.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Begin Date</strong></td>
<td>• The begin date of the experience</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>• The end date of the experience</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>• Listed as ‘Current’ if the experience record is for the current job</td>
</tr>
<tr>
<td><strong>FT/PT</strong></td>
<td>• The category of experience for the record</td>
</tr>
<tr>
<td><strong>FT/PT</strong></td>
<td>• Indicates whether the experience was full time (FT) or part time (PT)</td>
</tr>
<tr>
<td><strong>FT/PT</strong></td>
<td>• If full time (FT) is selected, then 100% of the time will be applied when calculating the <em>Years in FTE</em></td>
</tr>
<tr>
<td><strong>FT/PT</strong></td>
<td>• If part time (PT) is selected, then 50% of the time will be applied when calculating the <em>Years in FTE</em></td>
</tr>
<tr>
<td><strong>Years in FTE</strong></td>
<td>• The number of full time equivalent years for the experience</td>
</tr>
<tr>
<td><strong>Years in FTE</strong></td>
<td>• System calculated using the following calculation: Number of Years between the <em>Start Date</em> and <em>End Date</em> x <em>FT/PT</em> (100% if Full Time, 50% if Part Time)</td>
</tr>
<tr>
<td><strong>Years in FTE</strong></td>
<td>• Calculations are rounded to the nearest tenth of a decimal</td>
</tr>
<tr>
<td><strong>Exp Credit %</strong></td>
<td>• Experience Credit Percentage</td>
</tr>
<tr>
<td><strong>Exp Credit %</strong></td>
<td>• The percent credit for the experience based on the staff member’s current job code</td>
</tr>
<tr>
<td><strong>Related Experience Years</strong></td>
<td>• The full time equivalent years of experience for the experience related to the current job</td>
</tr>
<tr>
<td><strong>Related Experience Years</strong></td>
<td>• System calculated using the following calculation:</td>
</tr>
</tbody>
</table>
|                        |   • *Years in FTE* x *
|                        |   • *Experience Credit Percentage*                                          |
| **Related Experience Years** | • Calculations are rounded to the nearest tenth of a decimal                |
### Years of Experience Summary Page Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Any comments about the experience</td>
</tr>
</tbody>
</table>
| **Total As Of Current Date (Years in FTE)** | - The sum of the *Years in FTE* for all experience records as of the current date  
                                           |   - Rounded to the nearest tenth of a decimal                               |
| **Total As of Current Date (Related Experience Years)** | - The sum of the *Related Experience Years* for all experience records as of the current date  
                                           |   - Rounded to the nearest tenth of a decimal                               |

### Adding Years of Experience

Experience records can be added from the *Years of Experience Summary* page. Records for previous experience related to the current job as well as a record for the current job should be entered for a staff member. Follow the steps below to add an experience record.

1. Open the staff member listing page.
2. Click on the name of the staff member to open the *Credentials* page for the staff member. If the name is not a link that can be clicked, update the patient care flag for the staff member. See the *Updating the Patient Care Flag on the Staff Member Listing* section of this document for details.
3. On the *Credentials* page, click the *Years of Experience* link on the left side of the page to access the *Years of Experience* summary page.
4. Click the *Add Job Experience* button to open a blank *Job Experience* page.

![Job Experience Table](image)

*Total as of current date: 19.9  19.9*

*If the information on the page needs updating, please notify your Supervisor or Department Manager that the information needs to be updated.*

5. To select a type of experience that is related to the current job code, click the dropdown provided on the page and select the type of experience.
   - If for some reason you need to select an experience category that is not related to the current job code, click on the “here” link in the statement “Can't find the category you are looking for in the job-specific list above? Click here to select an Experience Category from the entire Experience Category list.” You will be prompted to search for the type of experience to be added. Options to search by professional category and/or name are available. You can also view the entire list.
   - To use a search option as opposed to viewing the entire list, click the *Search* radio button at the top of the page. This is the default option. You can search by professional category, category name, or both.
• Select one or more of the professional categories in the Search by Professional Categories section of the page
• Enter search criteria in the Search by Name section of the page. (Note that the search is a pattern match search. For example, a search for ‘RN’ will return any experience category with RN in the name)
• Click the Search button to return experience categories matching the search criteria entered
• Click on the Name or Professional Category headers to re-sort the results as needed
• Click the Select link next to the experience category to be added

Search for an Experience Category

- Show All
- Search
- Cancel

Search by Professional Categories:
- Clinical Support
- Laboratory
- Nursing Other - Licensed
- Pharmacy
- Registered Nurse Manager
- Rehabilitation
- Respiratory
- Surgical Services

Search by Name:  rn

Search Results

Choose an experience category from the list below to continue.
If you would like to filter the list, click the Search option above and enter search criteria.

<table>
<thead>
<tr>
<th>Name</th>
<th>Professional Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>RN: Direct Patient Care</td>
<td>Registered Nurses</td>
</tr>
<tr>
<td>RN: Indirect Patient Care</td>
<td>Registered Nurses</td>
</tr>
</tbody>
</table>

- Alternately, to view the entire list of experience categories, click the Show All radio button at the top of the page.
  • The list of categories will be displayed
  • Click on the Name or Professional Category headers to re-sort the results as needed
  • Click the Select link next to the experience category to be added
6. After selecting the experience category complete the fields using the guidelines provided in the

**Experience Update Guidelines** table below. In addition, click on the **Help** link on the page for additional guidelines. Records for past experience must be entered with a begin date and end date. One record for the current job must be entered with a begin date and an empty end date.

<table>
<thead>
<tr>
<th>Experience Update Guidelines</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Experience Category</strong></td>
<td>• Select the type of experience using the <em>Search for an Experience Category</em> page or select from the list of categories for the current job code (Required)</td>
</tr>
</tbody>
</table>
| **Begin Date**              | • Enter a begin date for the job experience in a MM/DD/YYYY format  
                                 • If the exact day is not known, enter the first day of the month (Required to save the record)  
                                 • The begin date on a full time record cannot overlap with another experience record's beginning and ending dates  
                                 • The begin date on a part time record may overlap with another part time experience record's beginning and end dates. It may not overlap with any full time record's date ranges |
| **End Date**                | • Enter an end date for the job experience in a MM/DD/YYYY format  
                                 • If the exact day is not known, enter the first day of the month  
                                 • The end date entered must be after the start date (Optional – if the record being entered is for the current job, leave this field empty)  
                                 • A staff member can only have one current experience record  
                                 • The end date on a full time cannot overlap with another experience record’s beginning and ending dates  
                                 • The end date on a part time record may overlap with another part time experience record’s beginning and ending dates |
### Experience Update Guidelines

<table>
<thead>
<tr>
<th>Field</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>experience record's beginning and end dates. It may not overlap with any full time record's date ranges</td>
<td></td>
</tr>
<tr>
<td>Full-Time/Part-Time</td>
<td>• Select whether the job experience is/was full time or part time work</td>
</tr>
<tr>
<td></td>
<td>• If full time (FT) is selected, then 100% of the time will be applied when calculating the <em>Years in FTE</em></td>
</tr>
<tr>
<td></td>
<td>• If part time (PT) is selected, then 50% of the time will be applied when calculating the <em>Years in FTE</em> (Required)</td>
</tr>
<tr>
<td>Comments</td>
<td>• Enter any notes about the experience (Optional)</td>
</tr>
</tbody>
</table>

7. Click the **Save** button to save the experience or **Cancel** to cancel adding the experience record. If the experience record is saved, the *Years of Experience Summary* page is displayed and the new experience record is added to the page.

**Type of Experience**  
RN: Direct Patient Care  
Can't find the category you are looking for in the job-specific list above? Click here to select an Experience Category from the entire Experience Category list.

**Begin Date**  
01/01/1990  
**End Date**  
01/01/1991  
**Full-Time/Part-Time**  
FT  
**Comments**  
(test comments)  
(max. 200 characters)  

Note: when entering dates, please take into account any breaks in work experience.

* If date is not known, enter first day of month.
** If date is not known, enter first day of month. Leave blank for current job.

### Editing Years of Experience

An experience record can be edited from a staff member's *Years of Experience Summary* page. Follow the steps below to edit an experience record:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the *Credentials* page for the staff member.
3. On the *Credentials* page, click the *Years of Experience* link on the left side of the page to access the *Years of Experience* summary page.
4. Click the *Edit* icon corresponding to the experience record requiring update. The *Job Experience* page is displayed.
5. Update the experience record using the guidelines above in the **Experience Update Guidelines** table.

6. Click the **Save** button to save the experience record or **Cancel** to cancel editing the experience record. If the experience record is saved, the **Years of Experience Summary** page is displayed with the updated information.

### Deleting Years of Experience

An experience record can be deleted from the staff member’s **Years of Experience Summary** page. Follow the steps below to delete an experience record:

1. Open the staff member listing page.
2. Click on the name of the staff member to open the **Credentials** page for the staff member.
3. On the **Credentials** page, click the **Years of Experience** link on the left side of the page to access the **Years of Experience** summary page.
4. Click the corresponding trashcan (delete) icon next to the experience record to be deleted.

5. Click **OK** to confirm, or **Cancel** to cancel the deletion.
6. If the record is deleted, the updated *Years of Experience Summary* page is displayed. The deleted experience record is no longer listed.

**Reviewing Experience when a Job Change Occurs**

If a staff member has a job change, a department responsible should review the job change and update the experience accordingly. When a change occurs, a message is displayed in CATS indicating that an experience review is required. The department responsible is required to review the experience and update it as needed based on the current job.

**Job Changes that Trigger an Experience Review**

The following PeopleSoft job changes trigger an experience review in CATS: (Note: the staff member must be active, in a job code where job experience is tracked, and in the staff or VTS employment class in order to trigger an experience review)

1. New Hire: Staff member is added to CATS for the first time.
2. Job Code Change: Staff member changes to a job code where experience is tracked.
3. Full-Time/Part-Time Change: Staff member’s Full-Time/Part-Time status changes.
4. Rehire (Activation): Staff member is rehired. The employment status changes from an inactive status to active.

**Experience Review Notification Methods**

CATS will indicate that a review is needed via the following methods:

1. On the staff member listing page, the *Exp Status* column for the staff member is either red or yellow.
   - A red box indicates the staff member is in a job code where experience is tracked and there is not any experience information captured for the staff member. Experience information needs to be entered for the staff member.
   - A yellow box indicates the staff member is in a job code where experience is tracked, and the staff member’s experience information needs to be reviewed because there has been a job change. The experience information may require some updates as a result of the job change.
2. On the staff member’s *Years of Experience Summary* page, a message is displayed at the top of the page indicating the type of job change that occurred. In addition, an additional *Confirm Review* button will be displayed at the bottom of the page.
**Experience Review and Update Process**

Follow the steps below to review job experience for a staff member that has had a job change:

1. Open the *Years of Experience Summary* page for the staff member that has had a job change.
2. If the staff member does not have any experience information entered:
   - Enter the past job experience and current job information using the guidelines in the *Adding Years of Experience* section of this document. Be sure to include past related experience with a Begin Date and End Date. Enter one record with a Begin Date and an empty End Date for the current job record.
3. If the staff member has experience information entered:
   - Review the job change message at the top of the page to determine the last job change that occurred. Note the staff member's current Job Code and Full-Time/Part-Time status.
   - Review all past experience information entered and the current experience record and determine if any changes are needed.
     - Confirm that all past experience entered for the staff member is correct
       - If any of the past experience requires an update, edit the records as needed using the guidelines in the *Editing Years of Experience* section of this document
       - If past experience is missing, add the experience records using the guidelines in the *Adding Years of Experience* section of this document
     - Confirm that the information entered for the current job experience record is correct
     - Confirm that the *Experience Category* and *Full-Time/Part-Time* status for the current experience record is correct based on the staff member’s current job
       - If an update is needed edit the current experience record, set an *End Date* for the record, and save the changes
       - Add a current experience record to capture the current job
       - Enter a *Begin Date*; select the *Experience Category* and *Full-Time/Part-Time* status based on the staff member’s current job and save the changes.
4. **IMPORTANT**: When the review and update is complete, click the *Confirm Review* button at the bottom of the page.
5. A confirmation box will appear.
   - Click *OK* to confirm that the experience information has been reviewed, any updates to the information are complete, the experience information is correct as of the current date based on the staff member’s current job, and no further action is needed at this time. The job change message
at the top of the screen and the Confirm Review button are removed. The experience status box on the staff member list changes to green.

- Alternately, click Cancel to indicate that the review is not complete and will be completed later. The experience status for the staff member will remain yellow (or red if no records are added). The job change message and Confirm Review button will remain on the Job Experience Summary page.

### Running Years of Experience Reports

Authorized CATS users can run reports on staff member’s experience. When logging into CATS, there is a Reports option on the left side of the page. Click on the link to access the CATS reports.

Follow the steps below to run an experience report:

1. Select the Total Experience for Salary Review option at the top of the report page.
2. Enter the department numbers to be included in the report. Separate department numbers with a comma. The default will include all departments unless otherwise specified.
3. Enter the job codes to be included in the report. Separate job codes with a comma. The default will include all job codes unless otherwise specified.
4. Select whether to include department responsible information in the report. If department responsible information is included, the employee ID and name for each of the following roles will be included for each record: department manager, PAF responsible, and department assistant(s).
5. The report will be output to an Excel spreadsheet unless changed to HTML output in the Generate report as option. Note: If HTML output is chosen, the report cannot be edited.
6. Select Generate Report to run the report.
7. If the report was generated in Excel, you will have to option to ‘Open’ or ‘Save’ the report. If saved, it is recommended that the report be saved to the local computer with a unique name.

8. If multiple criteria were selected such as departments or job codes it is recommended to add a filter to the column headings for easy sorting and filtering of data. Note: this only applies when generating the report as an Excel spreadsheet.

   - To Add a Filter, select the ‘Data’ Tab in Excel then click on ‘Filter’. Select the Filter and remove data from the list of choices for a more efficient view.

   - To Sort, make sure the entire spreadsheet is highlighted then click on ‘Sort’ then ‘Sort by’ field. For example, you may want to sort licensure data by expiration date or flag status.
Appendix A: Vanderbilt Credentials Verification Process and Policies

Licensure Verification from the Primary Source

1. Primary Source Verification: Use the state licensure web site (See Link below) to verify:
   - License number
   - Original date of issue
   - Renewal date

2. All licenses are to be verified from the primary source during the annual evaluation process.

3. When licenses are renewed, they are to be verified from the primary source.

4. If a new license is obtained, the information is to be verified from the primary source. (Example:
   LPN to RN or unlicensed staff to RN or LPN)

   NOTE: It is not appropriate verification or acceptable to only look at the license or a copy of the license.

5. After primary source verification, renew current information and/or add new information as indicated.

   http://health.state.tn.us/licensure/index.htm
   Policy references for complete licensure information:
   OP 30-10.03, “Licensure: Primary Source Verification/Reverification”
   CL 20-06.02, “Nursing Licensure Verification/Re-verification”
   CL 20-07.02, “Orientation, Competency and Performance Management”
   http://vumcpolicies.mc.vanderbilt.edu/E-manual/Hpolicy.nsf

Certification Data and Verification

1. All certification information is to be verified during the annual evaluation process.

2. When certifications are renewed, the information is to be updated.

3. When new certifications are obtained, the information is to be added.

   NOTE: Certifications that are required by law or a regulatory body for practice are to be verified at
   the primary source as listed above (Examples: Certified Registered Nurse Anesthetist, Advanced
   Practice Nurse, Nurse Midwife)

Degrees (Education)

1. Educational information is to be checked with the employee during the annual evaluation process.

2. If a new degree is obtained, the information is to be added.
Appendix B: Other Important Notes

Suppressing the Security Warning When Deleting Credentials in Internet Explorer 7 and above

1. If you are using Internet Explorer 7.0 or higher and have the security setting "allow websites to prompt for information using scripted windows" disabled you will encounter a warning when deleting a license or certification. When the delete license or certification icon (trashcan) is clicked, you will receive a message at the top of the browser window stating:

"This website is using a scripted window to ask you for information. If you trust this website click here to allow scripted windows."

2. In order to continue, you must click on the message at the top of the browser and select "Temporarily Allow Scripted Windows", then click the delete icon once more. This warning will occur each time you delete a license or certification. The security setting can be enabled in Internet Explorer so that the warning no longer appears. If you would like to change this setting and need assistance, please email hr@vanderbilt.edu and include contact information for your LAN manager or local technical support person. The CATS administrator will then contact your technical support and work with him/her on the setting change.