Vanderbilt University Medical Center

Credentials Application Tracking System

User’s Guide
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Document Change History

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<td>1.0</td>
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<td>Updated Appendix B. Users should email catsinfo if an IE setting needs to be changed.</td>
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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 licensed, clinical staff. The guide includes information on adding and managing licensure, certification, degree, and experience information in CATS. A summary of the steps to follow for each process and the corresponding CATS screenshots are provided in each section.

Need Help?

If problems are encountered with CATS after following the guidelines in this document or if you have suggestions for improvement, please send an email to the following address: compensation@vanderbilt.edu.

What is CATS?

CATS is a web application built specifically for Vanderbilt University Medical Center (VUMC) to capture and track credential information as well as staff job experience information. Initially developed in 2006, the application allows Vanderbilt department managers and PAF responsible staff to manage licensure, certification, degree, and experience information for their staff members in a centralized database via a web-enabled application. The application can be accessed by a department's manager or PAF responsible as a stand-alone application or by supervisors from a Vanderbilt Performance Evaluation System (VPES) pay for performance evaluation to update credentials and job experience. In addition, the VandyWorks scheduling system uses CATS licensure and BLS certification expiration information when determining whether a staff member can be scheduled. The application was originally developed to track nursing credentials and job experience. It has expanded to include other licensed, clinical jobs within the database.

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

The following is needed 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
2. If you do not have an ePassword, go to the following website and follow the instructions listed: http://its.vanderbilt.edu/epassword/Security access to use CATS. This is granted by being listed as a department manager or PAF responsible in PeopleSoft or a department assistant in CATS.
   - If you need to be granted access to use CATS, please discuss with the appropriate leader then make changes using the department change form. This form can be located at: http://hr.vanderbilt.edu/forms/documents/homedeptchangeform.pdf. Please fill out and return to Medical Payroll.
   - Access can be granted to two additional staff members per home department by the Department Manager or PAF Responsible listed in Peoplesoft.
3. Internet Explorer version 6.0 or higher running on a Windows operating system.
   - The CATS application is optimized for Internet Explorer version 6 running on a Windows platform.
   - 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 editing license, certification, and degree comments, or deleting licenses, certifications, and 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 to access the system.

2. Before login is allowed, 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

1. To view department assistants assigned to a department number:
   - Click on the Manage Departments link to open the Administer Department Assistants page.
   - A list of departments that have active staff members is displayed. The list is limited to those which the current user is authorized to access.
To view assistants assigned to a department:

- Click on the department number in the list, the following categories will appear: Assistants, Manager and PAF Responsible. The list of department assistant names will appear under the Assistant category. The categories of Manager and PAF Responsible are represented as listed in PeopleSoft and can only be changed in PeopleSoft.

To add assistants to a department:

- Click in the Add Employee Id box and enter the employee id of the individual that will be added as a department assistant. The employee’s name and department number will appear to confirm you have identified the correct staff member. Then, click on Add Staff which will list the staff member’s name under the Assistants category. Repeat the same process to add another assistant to the department.
To delete assistants from a department:

- Click on the trash can (delete) icon beside the employee’s name to verify you want to delete the person’s access as a department assistant.

2. To view department assistants assigned by Department Manager or PAF Responsible:

- Click on the Manage Departments link to open the Administer Department Assistants page.
- Click on the Assistants radio button. A list of active staff members assigned as department assistants will be displayed. The list is limited to those which the current user is authorized to access.

To view departments assigned to an assistant:

- Click on the department assistant’s name in the list and the assigned department names will appear. Even though a PAF Responsible or Department Manager can view all the departments for which the assistant has been assigned, they can only access the departments in which they have been authorized to access.
Selecting a Staff Member List

When you are successfully logged into CATS, the list of departments that you are authorized to see is displayed. You can choose to view staff lists by department (the default) or view all staff. Once a list is displayed, it can be filtered further or sorted to find a staff member or set of staff members to manage.

You have two options to view a list of staff members: view staff member lists by department and view all staff members list.

Viewing Staff Member Lists by Department

To view staff member lists 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 that have active staff members is displayed. Note that this page is displayed by default when logging into CATS.
2. The list of departments can be sorted by department number or department name if needed.
   - 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 the All Staff Members List**

To view a listing of staff members in your departments:

1. Click on the View All Staff link in the left side of the page to view a list of all your active staff members. 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.
Filtering and Sorting a Staff Member List

Once you have selected the staff member list, 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 filter options can be combined to narrow the search for a staff member. The list can also be sorted by the following: Experience Key, Licensure Key, Certification Key, Employee ID, and Name. Follow the steps below to filter or sort a staff listing.

Filtering the Staff Member List

1. If you want to further narrow the list of staff members to work with, 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:
         - A % 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.

)[
![Staff Members For All Managed Departments](image)

- **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.

)[
![Staff Members For All Managed Departments](image)

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 status 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 status 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 status 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 appear for the person. The staff member name becomes a link that can be clicked to access the credentials and experience.
The patient care flag must be updated on new staff as they are added to the database. It should also be updated if a staff member has 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:** Not Applicable. Staff Member is job that is not applicable to clinical operations.

- 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 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 for a person, the experience, licensure, and certification status boxes appear. The employee name becomes a link that can be clicked 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 do not need to be tracked for a person. Each staff member on a staff member list page 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 page. This field is used for list management purposes only. 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.
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.
4. Years of experience related to the current job can be viewed and updated from the **Years of Job Experience** page.

5. 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.

## Updating Licensures

Authorized CATS users have the ability to 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 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 New Licensure** button.
4. An empty licensure record is displayed on the page for update. Complete the fields using the guidelines provided in the **Licensure Update and Renewal Guidelines** table below.

**Licensure Update and Renewal Guidelines**

<table>
<thead>
<tr>
<th>Field</th>
<th>Guidelines</th>
</tr>
</thead>
</table>
| **Type**       | • Select the licensure type from the drop down on a new license.  
                 • Leave the licensure type as is when renewing a license. |
| **Issuing State** | • Select the state from the dropdown when adding a new license.  
                        • Leave the issuing state as is when renewing a license. |
| **License Number** | • Enter the license number when adding a new license.  
                       • Leave the license number as is when renewing a license.  
                       • Up to 20 characters can be entered, including numbers. |
| **Initial Lic Year** | • Enter the year that the licensure was originally received in YYYY format on a new license.  
                           • Leave the initial license year as is when renewing a license.  
                           • Only numbers can be entered. |
| **Expiration Date** | • Enter the expiration date in MM/DD/YYYY format on a new license.  
                            If the license is being renewed, enter a new expiration date in MM/DD/YYYY format.  
                            The new date must be after the previous expiration date. |
| **Comments**    | • Enter any notes about the license.  
                        • Up to 150 characters can be entered. |

5. Click the **Save Changes** button to save the new license or **Cancel** to cancel adding the new license. If the license is saved, the **Credentials** page is displayed and the new license is added to the page.
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 on the page 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 and comments should be updated on a renewal. If any other fields are updated, a new license will be created and two records will be displayed for the license upon saving.

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.

NOTE: If both the old and new licenses appear on the page after saving and the new license information is correct, the old license will need to be deleted.
Viewing Licensure Renewal History

The renewal history of a license is kept in the CATS database for each staff member. If a license is renewed a new record is added to the database. The old license information is retained for audit purposes. Follow the steps below to view the renewal 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 Employee Credentials link on the left side of the page to return to the staff member's credentials page.
**Editing Licensure Comments**

Once a license record is created, the comments can be updated if needed. Follow the steps below to edit a licensure 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** button corresponding to the license comments requiring update. 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 editing license comments.

![Image of Editing Licensure Comments](image1)

4. A popup is displayed at the top left corner of the page where the comments can be edited. Update the comments and click **OK** to save the changes and return to the **Credentials** page. Alternately, click **Cancel** on the popup to cancel the changes and return to the page.

![Image of Editing Licensure Comments](image2)

**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** 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 with the delete. The **Credentials** page is displayed and the license is removed from the page. Alternately, click **Cancel** on the confirmation or reason for deletion prompts to stop the delete.
**Updating Certifications**

Authorized CATS users have the ability to 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 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 New Certification button.

4. An empty certification record is displayed on the page for update. 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>Type</td>
<td>Select the certification type from the drop down on a new certification.</td>
</tr>
<tr>
<td></td>
<td>The certification type cannot be edited when renewing a certification.</td>
</tr>
<tr>
<td>Initial Cert Year</td>
<td>Enter the year that the certification was originally received in YYYY format on a new certification. Leave the initial certification year as is when renewing a certification. Only numbers can be entered.</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Enter the expiration date in MM/DD/YYYY format on a new certification. If the certification is being renewed, enter a new expiration date in MM/DD/YYYY format. The new date must be after the old expiration date.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any notes about the certification. Up to 150 characters can be entered.</td>
</tr>
</tbody>
</table>

5. 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.
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.

   ![Renewal Icon Example]

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 that only the expiration date and comments should be updated on a renewal. If any other fields are updated, a new certificate will be created and two records will be displayed for the certification upon saving.
5. Click the **Save Changes** button to save the renewed certification or **Cancel** to cancel renewing the certification. 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.

**NOTE:** If both the old and new certifications appear on the page and the new certification information is correct, the old certification will need to be deleted.
Viewing Certification Renewal History

The renewal history of a certification is retained in the CATS database for each staff member. If a certification is renewed a new record is added to the database. The old certification information is retained for audit purposes. Follow the steps below to view the renewal 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 **Employee Credentials** link on the left side of the page to return to the staff member’s credentials page.

Editing Certification Comments

Once a certification record is created, the comments can be updated if needed. Follow the steps below to edit a certification 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** button corresponding to the certification comments requiring update. 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 editing certification comments.
4. A popup is displayed at the top left corner of the page where the comments can be edited. Update the comments and click **OK** to save the changes and return to the **Credentials** page. Alternately, click **Cancel** on the popup to cancel the changes and return to the page.

![](image1.png)

---

**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 -trashcan 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.

![](image2.png)

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 with the delete. The **Credentials** page is displayed and the certification is removed from the page. Alternately, click **Cancel** on the confirmation or reason for deletion prompts to stop the delete.

---

**Updating 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 New 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.</td>
</tr>
<tr>
<td>Focus</td>
<td>• Enter the degree focus.</td>
</tr>
<tr>
<td></td>
<td>• Up to 50 characters can be entered.</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>
<tr>
<td></td>
<td>• Up to 150 characters can be entered.</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 if needed. Follow the steps below to edit a degree 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 button corresponding to the degree comments requiring update. 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 editing degree comments.
4. A popup is displayed at the top left corner of the page where the comments can be edited. Update the comments and click **OK** to save the changes and return to the **Credentials** page. Alternately, click **Cancel** on the popup 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. 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 degrees.
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 with the delete. The **Credentials** page is displayed and the degree is removed from the page. Alternately, click **Cancel** on the confirmation or reason for deletion prompts to stop the delete.

---

**Running Credentials Reports**

Authorized CATS users have the ability to run reports for licensure, certification, and education for staff members. When logging into CATS, there will be a ‘Reports’ option on the left side of the page.
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 for the report: patient care flag, licensure, certification or education.

2. Choose one or all of the authorized departments to be included in the report. The default will include all departments unless specified otherwise.

3. Choose one or all of the job codes to be included in the report. The default will include all job codes unless specified otherwise.

4. The data will automatically default to an Excel spreadsheet unless changed to HTML output. Note: If HTML output is chosen, the report can not be edited.

You will have to option to 'Open' or 'Save' the report. It is recommended that the report is saved to a computer with a unique name.
If multiple criteria is selected such as patient care flag, licensure, certification, departments or job codes it is recommended to add a filter to the column headings for easy sorting and filtering of data.

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.

### Updating Experience and Reviewing Experience when a Job Change Occurs

Authorized CATS users have the ability to 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 impact 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 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.

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></td>
<td></td>
</tr>
</tbody>
</table>
## Years of Experience Summary Page Information

<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></td>
<td>• Listed as 'Current' if the experience record is for the current job.</td>
</tr>
<tr>
<td><strong>Category</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></td>
<td>• If full time (FT) is selected, then 100% of the time will be applied when</td>
</tr>
<tr>
<td></td>
<td>calculating the <strong>Years in FTE</strong>.</td>
</tr>
<tr>
<td></td>
<td>• If part time (PT) is selected, then 50% of the time will be applied when</td>
</tr>
<tr>
<td></td>
<td>calculating the <strong>Years in FTE</strong>.</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></td>
<td>• System calculated using the following calculation:</td>
</tr>
<tr>
<td></td>
<td>Number of Years between the <strong>Start Date</strong> and <strong>End Date</strong> x <strong>FT/PT</strong></td>
</tr>
<tr>
<td></td>
<td>• Calculations are rounding to the nearest tenth of a decimal.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>• Any comments about the experience.</td>
</tr>
<tr>
<td><strong>Total As Of Current Date (Years in FTE)</strong></td>
<td>• The sum of the <strong>Years in FTE</strong> for all experience records as of the current date.</td>
</tr>
<tr>
<td></td>
<td>• Rounded to the nearest tenth of a decimal.</td>
</tr>
</tbody>
</table>

## 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.

![Years of Experience Summary Page](image)
5. 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>Field</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Begin Date</strong></td>
<td>- Enter a begin date for the job experience in a MM/DD/YYYY format.</td>
</tr>
<tr>
<td></td>
<td>- If the exact day is not known, enter the first day of the month.</td>
</tr>
<tr>
<td></td>
<td>- Required to save the record.</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>- Enter an end date for the job experience in a MM/DD/YYYY format.</td>
</tr>
<tr>
<td></td>
<td>- If the exact day is not known, enter the first day of the month.</td>
</tr>
<tr>
<td></td>
<td>- The end date entered must be after the start date.</td>
</tr>
<tr>
<td></td>
<td>- Optional. If the record being entered is for the current job, leave this field empty.</td>
</tr>
<tr>
<td></td>
<td>- A staff member can only have one current experience record.</td>
</tr>
<tr>
<td><strong>Type of Experience</strong></td>
<td>- Select the type of experience from the drop down.</td>
</tr>
<tr>
<td></td>
<td>- Required.</td>
</tr>
<tr>
<td><strong>Full-Time/Part-Time</strong></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 <strong>Years in FTE</strong>.</td>
</tr>
<tr>
<td></td>
<td>- If part time (PT) is selected, then 50% of the time will be applied when calculating the <strong>Years in FTE</strong>.</td>
</tr>
<tr>
<td></td>
<td>- Required.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>- Enter any notes about the experience.</td>
</tr>
<tr>
<td></td>
<td>- Optional.</td>
</tr>
<tr>
<td></td>
<td>- Up to 200 characters can be entered.</td>
</tr>
</tbody>
</table>

6. 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.
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** on the confirmation prompt to continue with the deletion, or **Cancel** to stop the delete.

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, the department manager or PAF 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 manager or PAF responsible is then 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 that the staff member must be active, in a job code where job experience is tracked (currently nursing), 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 indicates 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.

   ![Years of Experience Summary Example](image)

**Experience Review and Update Process**

Follow the steps below to review job experience for a staff member that has had a job change and confirm that the review is complete.

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 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. 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, and 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 on the staff member 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 have the ability to run reports for years of experience for staff members. When logging into CATS, there will be a ‘Reports’ option on the left side of the page.

Follow the steps below to run a Years of Experience report. The report will automatically default to a Years of Experience Report.

1. Choose ‘Total Experience for Salary Review’
2. Choose one or all of the authorized departments to be included in the report. The default will include all departments unless specified otherwise.
3. Choose one or all of the job codes to be included in the report. The default will include all job codes unless specified otherwise.
4. The data will automatically default to an Excel spreadsheet unless changed to HTML output. Note: If HTML output is chosen, the report can not be edited.
You will have to option to ‘Open’ or ‘Save’ the report. It is recommended that the report is save to a computer with a unique name.
If multiple criteria is 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.

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 years of experience from least to greatest for a specific job code.
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

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

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

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

   NOTE: Certifications which 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 Editing Credential Comments or Deleting Credentials in Internet Explorer 7

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, certification, or degree, or editing comments on a license, certification, or degree. When the delete credentials icon (trashcan) or edit comments button 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."

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 or edit comments button again. This warning will occur each time you delete a credential or edit credential comments. 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 compensation@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.