NIHTC CLASS OFFERING WORKFLOW
USER GUIDE

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Creating the Class Offering Action
The NIH Training Center (NIHTC) Class Offering workflow is used to track class offerings that will be managed, approved and coordinated by the NIHTC. The Program Manager (PM) is typically responsible for initiating the Class Offering action in WiTS.

Initiating the Action
From the Process Initiation bizcove, select NIHTC Class Offering. You may click directly on the NIHTC Class Offering link or select the checkbox next to the NIHTC Class Offering link and then select Start My WiTS Process.

Class/Offering Tab

- **WiTS#, Date Entered:** System-generated.
• **Program Manager:** Select the Program Manager who will be responsible for the Class Offering.

• **Training Coordinator:** Select the Training Coordinator who will be responsible for the Class Offering.

• **Enrollment Training Type:** Indicate if the Class Offering is an open or closed enrollment. If you select closed enrollment, additional fields will populate toward the bottom of the Class/Offering Tab that will be mandatory to complete.

• **Course ID:** Enter the Course ID.

**WiTS Tip:** If you receive an error message indicating that the Course ID does not exist, check to ensure that you’ve entered the ID as listed on the NIHTC master spreadsheet of class offerings. Be sure there are no spaces (For example NIH LMS Local Learning Registrar should be entered as NIHTC1001). If the Course ID does not exist in the WiTS database, you will need to manually enter the Course ID, Title of Training, Course Description, Course Abstract, Class Minimum, Class Maximum, Vendor Cost and Administrative Level of Effort fields.

• **Offering ID:** This field is not completed until after the offering has been approved and the TC has posted the training in the LMS. Enter the Offering ID of the class.

• **Remote Supplement ID:** This field is not completed until after the offering has been approved and the TC has posted the training in the LMS. If applicable, enter the remote supplement ID.

• **Title of Training:** Enter the title of the training. For most Class Offerings this field will be auto populated based on the course ID.

• **Course Description:** Enter the course description. For most Class Offerings this field will be auto populated based on the Course ID.

• **Class Minimum/Maximum:** Enter the minimum and maximum number of students for this offering. For most Class Offerings this field will be auto populated based on the course ID.

• **Course Abstract:** Enter the course abstract. For most Class Offerings this field will be auto populated based on the Course ID.

• **Class Start/End Date:** Enter the start and end date of the offering.

• **Location:** Enter the location of the class. If you select other, you will be required to enter a location in the Other Location field.

• **Location Maximum:** The maximum number of students that location can hold will be auto populated based on the Location that is selected. If you select other as the location, you will be required to enter the location maximum.

• **Start/End Time:** Enter the start and end time of the offering. Be sure to also select AM or PM.
• **Start/End Date/Week:** Enter the start and end day for that particular portion of the class. The day of the week will auto populate based on the date that is selected.

WiTS Tip: If an offering is held in multiple locations, different hours on different days, and/or there is a gap in time between days during which the offering is being held, you will need to use multiple rows in the table.

• **Number of Days of Class:** Enter the total number of days of class. Select half days if necessary. This field is used to calculate the classroom costs.

• **Classroom Type:** Indicate if the classroom type is no charge, traditional, or computer. This field is used to calculate the classroom costs based on the cost associated with the classroom type.

• **Offering Comments:** Enter any comments about the class offering that may be useful to document.

**Closed Enrollment Fields**

• **Roster By:** Indicate if the roster will be provided by NIHTC or the Customer.

• **Point of Contact (POC):** Enter the name, phone number and email address of the POC for the class. When the POC is a staff member at NIH, use the NIH Enterprise Directory (NED) lookup to pull this information in directly from NED.

• **Budget Approver:** Enter the name, phone number and email address of the Budget Approver for the class. When the Budget Approver is a staff member at NIH, use the NIH Enterprise Directory (NED) lookup to pull this information in directly from NED.

• **Customer:** Select the NIH Institute/Center or HHS OPDiv.

• **Customer CAN:** Enter the customer CAN associated with the class.

• **IAA Number:** Enter the IAA number.

• **IAA Amount:** Enter the IAA amount.

• **IAA Description:** Enter the description of the IAA.

**Cost & Vendor Tab**
Cost Information Fields

- **Vendor Payment Required**: Indicate if a vendor payment is required for the class. If the vendor payment is required, the following fields are mandatory to complete; Vendor Name, DUNS Number, Vendor’s Email Address, Vendor Cost, Vendor Phone Number, and Vendor Justification. Additionally, the Payment Processing field will appear on the Delivery Tab.

- **Vendor Cost**: Enter the dollar value of the vendor cost, if applicable. If the course was included in the NIHTC master spreadsheet of class offerings that was uploaded into the WiTS database, this cost will be auto populated based on the Course ID entered on the Class/Offering Tab.

- **Classroom Cost**: The classroom cost is determined by multiplying the number of days of class by the cost associated with the classroom type as indicated on the Class/Offering Tab.

- **Parking Cost**: Enter the dollar value for parking cost for the class. The parking cost is the location parking rate multiplied by the class minimum plus one for the instructor.

- **Material Cost**: If applicable, enter the dollar value paid for instruction materials as stated in the training agreement.

- **In-House Printing Needed**: Indicate if there is in-house printing needed for the class. If yes is selected, a reminder will be included in email notices.

- **Administrative Level of Effort**: Indicate the administrative level of effort (Level A, B, C or D). If the course was included in the NIHTC master spreadsheet of class offerings that was uploaded into the WiTS database, this field will be auto populated based on the course ID entered on the Class/Offering Tab.
- **Administrative Cost:** The administrative cost is auto populated based on the administrative level of effort (Level A, B, C or D).

- **Other Cost Description:** If applicable, enter a short description of any additional fees not included in the vendor rate.

- **Other Cost Amount:** If applicable, enter the dollar value of the additional fees as described in the Other Cost Description field.

- **Overhead Cost:** The dollar value of the overhead cost for the class. This field is auto calculated by WiTS by adding vendor, classroom, material, parking, administrative and other costs and multiplying by .08.

- **Calculated Tuition:** The dollar value of costs to be recovered per student for the class. The calculated tuition is auto calculated by WiTS by dividing the total cost by the class minimum as indicated on the Class/Offering Tab.

- **Total Cost:** The dollar value of all offering costs. This field is auto calculated by WiTS by adding the vendor, classroom, material, parking, administrative, other, and overhead costs.

- **Actual Tuition:** Enter the dollar value of tuition to attend the offering. This amount is based off of costs to be recovered per student and it may be adjusted by the Program Manager for optics or other business reasons.

**Vendor Information Fields**

- **Vendor Name:** Enter the vendor name or use the Vendor Lookup to search NBS.

- **DUNS Number:** Enter the vendor’s DUNS number.

- **EIN:** If available, enter the vendor’s EIN.

- **Vendor Email Address, Phone Number, and Address:** Enter the vendor’s email address, phone number, and address. The email address entered will be used when sending the SF182 email to the vendor.

- **Vendor Justification:** Enter the vendor justification.

**WiTS Tip:** The vendor Look up will return the vendor information that is available in NBS. If available in NBS, the DUNS Number, EIN, Vendor Email Address, Vendor Address and/or Vendor Phone Number fields will be auto populated. If you are unable to find the vendor using the lookup, try alternative names the vendor may use as seen in NBS.

➢ **Routing Point**
After the Class/Offering (with the exception of the Offering ID) and the Cost & Vendor Tabs have been completed, the PM sends the action for approval. Using the routing menu the PM will ‘select Send for Approval’.

![Image of Send for Approval option]

Note: If you initiated an action in error, you may select ‘Cancel – No Record Kept’

All users who have the role of Approver will receive an email notifying them that they have an offering awaiting their review as shown below.

![Image of email notification]

**Approval Tab**

The Approver will access the action from the Class Offering Pending Approval bizcove and complete the Approval Tab.

![Image of Approval Tab]

**Approval Tab**

The Approver will access the action from the Class Offering Pending Approval bizcove and complete the Approval Tab.
• **Approver**: Select the Approver for the class offering.

• **Approval Status**: Indicate if the class offering is approved, disapproved or if corrections are needed. If the action is disapproved, the Disapproved Reason field will appear and be required.

• **Approval Status Date**: The approval status date is auto populated when the class offering is approved or disapproved by the Approver as indicated by their selection from the routing menu.

• **Approver Comments**: Enter any comments as necessary. For example, if corrections are needed, the Approver can indicate what corrections are needed in this field.

➢ **Routing Point**

After completing the fields on the Approval Tab, the Approver makes a selection from the routing menu that matches the approval status as indicated on the form.

*Approved – Send to TC*

This selection indicates that the offering has an approval status of ‘Approved’ and will be sent to the Training Coordinator (TC). The TC and PM will receive an email notifying them that the offering has been approved.
Modify – Send to PM
This selection indicates that the offering has an approval status of ‘Corrections Needed’. The PM will need to modify the action and route back to the Approver. The PM will receive an email notifying them that the action has been returned and modifications are needed.

Disapproved – Close Out Action
This selection indicates that the offering has an approval status of ‘Disapproved’ and the action will be closed and sent to archives. The PM and Approver will receive an email notifying them that the offering has been disapproved.

NIH Domestic Travel (CGE), NIHTC2700 has been approved and sent to the Training Coordinator, Samantha Lubel for further action. Please see below for details.

- WITS Number: 36144
- Title of Training: NIH Domestic Travel (CGE)
- Course ID: NIHTC2700
- Class Location: Rockledge 1- RCL, other locations...
- Class Dates: 07/03/2016 - 07/07/2016
- Offering Comments:
- Approver Comments:

Please log into WITS to take further action on this action. http://wits-test.od.nih.gov

NIH Domestic Travel (CGE), NIHTC2700 on 06/29/2016 has been returned to your worklist and requires modifications. Please see below for details.

- WITS Number: 36205
- Approver Comments: please update the Vendor email address.

Please log into WITS to review this training offering, make the necessary modifications and re-send the action for approval. http://wits-test.od.nih.gov

NIH Domestic Travel (CGE), NIHTC2700 on 06/29/2016 has been disapproved. Please see below for details.

- WITS Number: 36205
- Reason for Disapproval: class no longer needed.

This action has been completed and sent to archives.
**Delivery Tab**
The Delivery Tab is separated into two sections: Program Management and Training Coordination.

<table>
<thead>
<tr>
<th>Class/Offering</th>
<th>Cost &amp; Vendor</th>
<th>Approval</th>
<th>Delivery</th>
<th>Close Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery Status*:</td>
<td>Confirmed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Coordination</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Training Posted in LMS*:</td>
<td>07/01/2016</td>
<td></td>
<td></td>
<td>07/01/2016</td>
</tr>
<tr>
<td>Date Class Filled:</td>
<td>07/05/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date SF182 Sent to Vendor:</td>
<td>06/29/2016 02:21 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Training Coordination**

- **Date Training Posted in LMS:** Enter the date the training was posted in the LMS.

  ➤ **Routing Point**
  Once the TC posts the class offering in LMS and indicates the Offering ID (on the Class/Offering Tab), they will route the action to the PM for the delivery decision to be made. The TC selections Send to PM – Offering Posted from the routing menu.

This will send an email to the PM notifying them that the class offering has been posted and will alert them that a delivery decision is needed two weeks prior to the class start date.
Program Management

- **Delivery Status**: The PM selects confirmed or canceled to indicate if the class will be held. If canceled is selected, the reason for cancelation must be completed.
  Note: The Delivery Status field can only be edited by the PM or Approver.

  ➢ **Routing Point**
  The PM then selects Send to TC from the routing menu to send the action back to the TC to complete the remainder of the Delivery Tab and their portion of the Close Out Tab.

This will send an email to the TC notifying them of the Delivery Decision.
Training Coordination

The TC will complete the remaining fields on the Delivery Tab.

- **Date Displayed to Learners**: Enter the date the class was displayed to learners in the LMS.
- **Date Class Filled**: Enter the date the class was filled.
- **Payment Processing**: Select if the payment processing will be SF182 or POTS.
- **SF182/POTS Number**: Depending on your selection in the Payment Processing field, enter either the SF182 or POTS number.

**Routing Point**
When applicable, before the class start date, the TC will send the SF182 to the vendor. This is done by selecting Send Email to Vendor (SF182).

This will send an email to the vendor email address listed on the Cost & Vendor Tab.
• **Date SF182 Sent to Vendor:** The Date SF182 Sent to Vendor is auto generated when the SF182 email is sent using the routing menu.

• **Delivery Comments:** Enter any comments relating to the delivery of the class.

**Close Out Tab**
The TC will complete the majority of the Close Out Tab.

<table>
<thead>
<tr>
<th>Class/Offering</th>
<th>Cost &amp; Vendor</th>
<th>Approval</th>
<th>Delivery</th>
<th>Close Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Learners Approved*</td>
<td>10</td>
<td>Number of Learners Remaining*: (Pending and waitlisted)</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Date LMS Closed Out*:</td>
<td>07/28/2016</td>
<td>Evaluation Report Attached*:</td>
<td>Yes ✓</td>
<td></td>
</tr>
<tr>
<td>Date of PM Review*:</td>
<td>07/28/2016</td>
<td>Final Roster Attached*:</td>
<td>Yes ✓</td>
<td></td>
</tr>
</tbody>
</table>

• **Number of Learners Approved:** Enter the number of learners approved for the class offering.

• **Number of Learners Remaining:** Enter the number of learners remaining. This is the number of learners who created an LMS order but did not make it to the approved roster due to being waitlisted or still pending approval(s).

• **Date LMS Closed Out:** Enter the date that the LMS class offering was closed out.

• **Evaluation Report:** Indicate whether or not the evaluation report is attached to the action.

• **Final Roster Attached:** Indicate whether or not the final roster is attached to the action.

➢ **Routing Point**
The TC sends the action to the PM for Final Review by selecting Send to PM - Final Review from the routing menu.

- **Date of PM Review:** Enter the date of PM Review before completing the action.

The PM selects Complete from the routing menu.

This sends and email to the PM and TC notifying them of the WiTS close out for the class offering action.

**Reminder Emails**

There are several reminder emails that may be sent out during the life of the class offering action. These emails are intended to ensure that tasks associated with the class offering process are completed timely and to provide the NIHTC users with helpful reminders.
All of the emails listed below are sent at approximately 6:00am (ET) every morning (including weekends and holidays).

**Delivery Decision Needed**
Two weeks (calendar days) prior to the Class Start Date, a reminder email will be sent to the PM with a CC to the TC if the Delivery Status on the Delivery Tab has not been completed.

![Delivery Decision Needed Email](image)

A Delivery Decision (Confirm or Cancel) is needed for NIH-LMS Local Learning Registrar, NIHTC1001.

Please see below for details.

- WiTS Number: 36110
- Title of Training: NIH-LMS Local Learning Registrar
- Course ID: NIHTC1001
- Offering ID: 1234567
- Class Dates: 07/04/2016 - 07/04/2016
- Location: Rockledge I - RC1

Please log into WiTS and indicate a Delivery Status (Confirm or Cancel). WiTS Reminder - This offering requires in-house printing, please remember to order supplies and print all necessary materials.

**Reminder to Send SF182**
For classes that may require an SF182 to be sent to the Vendor prior to the Class Start Date, a reminder notice is sent to the TC and PM. The email is sent seven, three, and one calendar day(s) before the Class Start Date. The reminder that is sent one calendar day before the Class Start Date will be sent to the TC, PM and Approver.

The email is NOT sent if:
- Vendor Payment Required? = No
- Payment Processing = POTS
- Date SF182 Sent to Vendor has been auto generated.
Class Occurring Soon Reminder
Two business days prior to the Class Start Date, a reminder notice is sent to the TC and PM to serve as a reminder that their class start date is approaching.

LMS Close Out Needed Reminder
Five business days after the Class End Date, if the Date LMS Closed Out has not been completed, a reminder email is sent to the TC and PM reminding them to close out LMS. This email is sent every five business days until it has been completed. Starting on day ten after the Class End Date, the Approver will also be included on this email.
Navigating your Work Area Pages

Depending on your role for the NIHTC Class Offering Workflow, you will have access to the PM View, TC View, and/or Approver view. Each work area page view varies slightly with different bizcoves based on what that role will need to view/take action on within the workflow.

My NIHTC Class Offerings

This bizcove filters actions that are currently with each user for action.

For example, if you are a PM and the TC has routed an action to you for Final Review, that action will be available for you to access and take action on in this bizcove. If you are a PM, this is also where you will find actions that you have drafted but not yet submitted for approval.
Class Offerings Pending Approval
This bizcove is only seen on the Approver view, as it contains all Class Offering actions that have been sent for approval.

All NIHTC Class Offerings with Program Managers
This bizcove is only seen on the PM view, as it contains all Class Offerings that are currently with any PM for action. Any PM has the ability to open an action from this bizcove and take action if necessary.

All NIHTC Class Offerings with Training Coordinators
This bizcove is only seen on the TC view, as it contains all Class Offerings that are currently with any TC for action. Any TC has the ability to open an action from this bizcove and take action if necessary.

Accessing Class Offerings from the All Class Offerings with Program Managers/Training Coordinators bizcoves
Unlike your My NIHTC Class Offerings bizcove, the All Class Offerings with Program Managers and All Class Offerings with Training Coordinators bizcoves are monitor bizcoves, and not intended to be used on a regular basis for retrieving actions. These bizcoves should only be used to access actions when another PM/TC is not available.
To open an action from either of these bizcoves, select the WiTS number hyperlink on the bizcove. A process instances window will appear. Check the last work item that is listed and select complete.
All Active NIHTC Class Offerings
This view only bizcove contains All Active NIHTC Class Offerings regardless of their current location. Actions cannot be opened from this bizcove.

Accessing Archived Actions
Actions that have been Disapproved or Completed in WiTS, will no longer be available on your Work Area page, rather you will need to access the NIHTC Class Offerings Archive Work Area Page to view this actions. Please refer to the WiTS Finding Archives Actions User Guide for details.

WiTS Tip: Accessing archived actions is most useful if you need to refer to an attachment or action specific details that may not be available on reports. Most often, it is recommended to a view an NIHTC report to quickly access and view details of completed actions.