

# Employee Records Management Using Certifications and Docs

with  
Tiffany Patterson Hedges



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# Employee Records Management: Docs

## Consultant Docs:

- Define Document Types
- Provide Group Access
- Upload Docs

The screenshot shows the TutorTrac Main Menu web application. The browser address bar displays <https://tutoring.aac.ohio.edu/TracWeb40/main.asp>. The page features a navigation bar with a search box and a 'Log Student' field. The main content area is titled 'TutorTrac Main Menu' and includes a welcome message: 'Hello Tutors, SI Leaders, and Study Skills Coaches!'. A list of instructions is provided: 1. Please make sure students complete the log-in and log-out process. 2. Don't forget to cancel your appointments 12 hours in advance. If you must cancel, please send a courtesy email to the student prompting them to reschedule. 3. Remind students missing or cancelling two sessions will block them from TutorTrac, and they will need to meet with an AAC staff member to lift the block. Below the instructions, contact information for the Academic Achievement Center is listed: Alden Library 230, 1 Ohio University, Athens OH 45701-2979, T: 740.593.2644, F: 740.593.0338. The page also includes a 'Tip of the Week' section for the 'Redrock Conference 2019' and various utility links on the left side.

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# Employee Records Management: Docs

**Batch Utilities**

Batch utilities allow you to perform searches, data changes and various other operations on a selection of records. Many of these operations **can not be undone** so do not activate a destructive process if you are unsure of the results.

There are **0** records for processing.

Custom Utility System Prefs **Advanced Prefs** LDAP Tool Email Tool Auto Events Auto Reports

documentPostTypes [Return to list](#)

What are various categories of documents that might be posted?

- Tutor Recommendation
- Tutor Application
- Tutor FERPA
- Tutor Observation/Self Evaluation
- Tutor CRLA Certificate
- Tutor No Show Report
- Tutor Diversity Reflection
- Tutor Handbook Response
- Appointment Notes

[Save](#) [Delete](#)

## Consultant Docs: The Set Up (Part 1)

As SysAdmin – Go to Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Advance Prefs Tab -> enter in the search bar 'documentPostTypes' -> click on documentPostTypes in the list -> enter your list of document types -> Save

### Examples:

Tutor Application, Tutor Observation, Tutor Recommendation, Tutor FERPA



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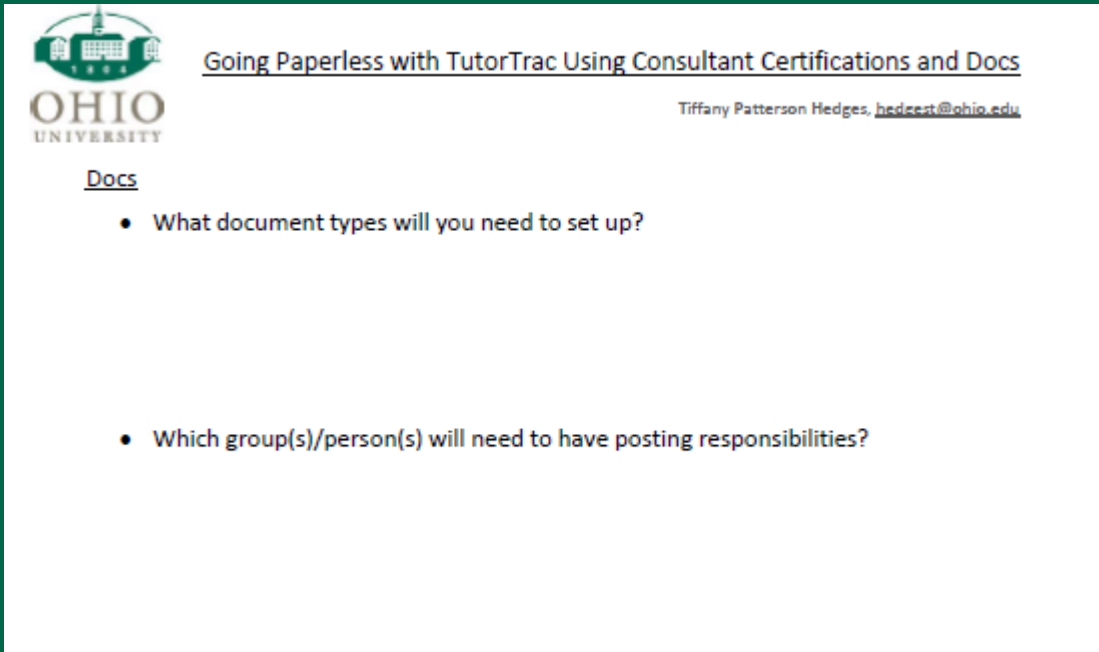
# Employee Records Management: Docs


## Consultant Docs: The Set Up (Part 1)

What document types would you have in your center?

Examples:

Tutor Application, Tutor Observation, Tutor Recommendation, Tutor FERPA



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Going Paperless with TutorTrac Using Consultant Certifications and Docs

Tiffany Patterson Hedges, [hpattest@ohio.edu](mailto:hpattest@ohio.edu)

Docs

- What document types will you need to set up?
  
- Which group(s)/person(s) will need to have posting responsibilities?



# Employee Records Management: Docs

## Consultant Docs: The Set Up (Part 2)

As SysAdmin – Go to Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Group Access Tab -> click on the group to have access -> choose Post Doc Types and click drop down to choose all documents for group -> Save

*Note:*

*Continue for all Groups needing document posting responsibilities*



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# Employee Records Management: Docs

## Consultant Docs: The Set Up (Part 1)

Which group(s)/person(s) will need to have posting responsibilities?

Examples:

Administrators, Lead Tutors



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### Docs

- What document types will you need to set up?
  
- Which group(s)/person(s) will need to have posting responsibilities?



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# Paperless Office: Application

## Tutoring Application

If you believe in our mission and meet our requirements, we want to meet you!

Applications are accepted on a rolling basis. We typically hire tutors through a group hiring process twice per semester, and we also hire tutors as necessary to meet tutoring requests.

- Complete the [AAC Tutor Application](#)
- Submit two [OHIO Faculty Reference Forms](#)
- Transfer students will need to submit a copy of your DARS (PDF copy only)

Feel free to stop by the AAC and drop off your DARS and/or reference forms.



## AAC Tutor Application

Thank you for your interest in becoming an AAC tutor. AAC tutors play an important role in helping students succeed. Before applying, please be sure to read the job description and training requirements at <http://www.ohio.edu/tutoring/job.cfm>. Be prepared for five hours of training before you can begin tutoring.

\* Required

OU Email Address \*

We will use this email address to communicate with you throughout the process.

tp012345@ohio.edu

First Name \*

Tiffany

Last Name \*

Patterson Hedges



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# Paperless Office: Faculty Recommendation

## Tutoring Application

If you believe in our mission and meet our requirements, we want to meet you!

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- Complete the [AAC Tutor Application](#)
- Submit two [OHIO Faculty Reference Forms](#)
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Feel free to stop by the AAC and drop off your DARS and/or reference forms.



### Faculty Recommendation Form – Tutoring Services

**To Student:** Recommendations must be completed by a faculty member. Please complete the top section before you request a recommendation.

Applicant Name :	Tiffany Patterson Hedges		Date:	Mar. 28 2018
Course:	MATH 1200	Course:	MATH 2301	Course:
Course:		Course:		Course:

**To Faculty:** The applicant above is applying to become a tutor for the Academic Advancement Center. Tutors must interview for the position and complete in-person training during their first semester as tutors. After training, tutors are observed each semester for continued professional development. For additional information, visit <http://www.ohio.edu/tutoring/apply.cfm>. Please send this form via interoffice mail or email to [tutoring@ohio.edu](mailto:tutoring@ohio.edu). If returning to applicant, please return in a sealed envelope and sign over the seal to ensure confidentiality. Thank you for helping provide quality tutoring services.

Faculty Name: (Print) Brandy Stiverson Department: Mathematics

OU Email: stiverso@ohio.edu

How long have you known the applicant and in what capacity?

1.5 years, Tiffany has been my advisee in the Math department and I have had her in class.

I highly recommend       I recommend with some reservation       I do not recommend

	Superior	Above Average	Average	Below Average	Unknown
Student is knowledgeable of course content.	✓				
Student has strong communications skills and can relate information in a clear and articulate manner.	✓				



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# Employee Records Management: Docs

**Center Profile: Athens TutorTrac Profile**

General | Centers | Group Access | **Consultants** | Sections | Reasons | Prefs

Sequence: 912 [Return to List](#)

First Name: Tiffany  Do not show on schedule

Last Name: Patterson Confirm:  Bio Next Login  Prefs Next Login

General info | Contact info | Subcenters | Certifications | Section Specialties | Reason Specialties | Messages | **Docs**

Consultant Seq: 912 [?](#)

Name: Patterson, Tiffany

[Upload...](#) 4 hedgest Posted Documents found

File	Date	Type	Posted By	Notes	FollowUp
<a href="#">Adelbayo_FERPA.pdf</a>	4/5/2018	Tutor FERPA	Adminhedgest		00/00/00 ✓
<a href="#">HedgesR2.pdf</a>	3/28/2018	Tutor Recommendation	Adminhedgest		00/00/00 ✓
<a href="#">PattersonApp.pdf</a>	3/28/2018	Tutor Application	Adminhedgest		00/00/00 ✓
<a href="#">HedgesR1.pdf</a>	3/28/2018	Tutor Recommendation	Adminhedgest		00/00/00 ✓

[Save Consultant](#)  Available for ALL Specialties on Visit Entry [Delete Consultant](#)

## Consultant Docs: Uploading

With Access Rights – Go to Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Consultants Tab -> choose specific consultant -> Docs Tab -> click on ‘upload’ select type of document from dropdown list, hover over ‘choose file for upload’ then click ‘browse’ and select document -> Save -> Save Consultant



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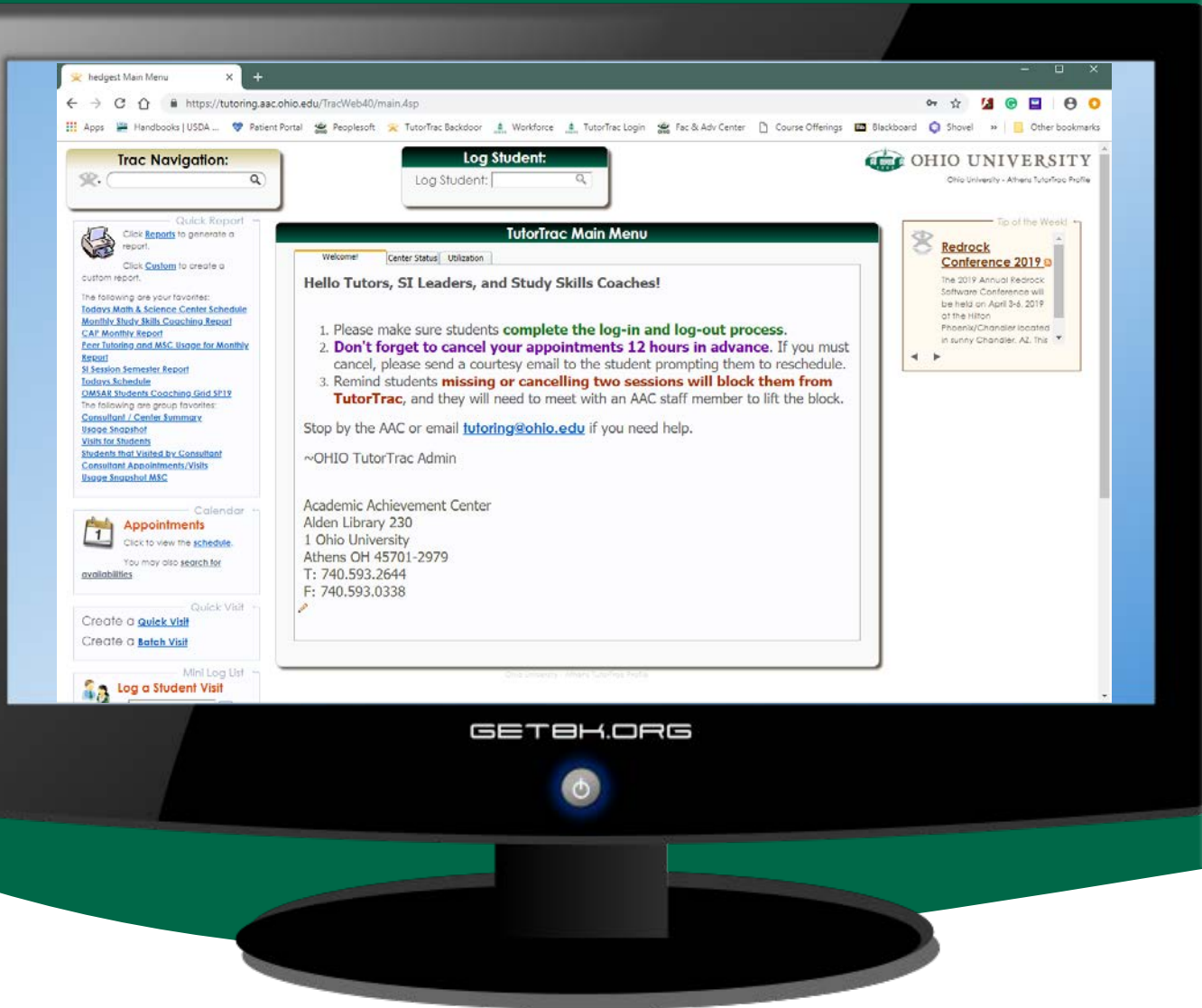
The screenshot shows the TutorTrac Main Menu web application. The browser address bar displays <https://tutoring.aac.ohio.edu/TracWeb40/main.asp>. The page features a navigation bar with a search box, a 'Log Student' field, and the Ohio University logo. The main content area is titled 'TutorTrac Main Menu' and includes a welcome message: 'Hello Tutors, SI Leaders, and Study Skills Coaches!'. It lists three key instructions: 1. Complete the log-in and log-out process. 2. Don't forget to cancel your appointments 12 hours in advance. 3. Remind students missing or cancelling two sessions will block them from TutorTrac. Contact information for the Academic Achievement Center is provided: Alden Library 230, 1 Ohio University, Athens OH 45701-2979, T: 740.593.2644, F: 740.593.0338. The page also includes a 'Tip of the Week' section about the Redrock Conference 2019 and a sidebar with various report and appointment links.

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# Employee Records Management: Certifications



## Consultant Certifications:

- Input Certification Type
- Maintain Accurate Lists
- Reporting Features



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# Employee Records Management: Certifications

**Center Profile: Athens TutorTrac Profile**

General | Centers | Group Access | **Consultants** | Sections | Reasons | Prefs

Sequence: 912 Return to List

First Name: Tiffany  Do not show on schedule

Last Name: Patterson Confirm:  Bio Next Login  Prefs Next Login

General info | Contact info | Subcenters | **Certifications** | Section Specialties | Reason Specialties | Messages | Docs

Create New 12 certifications found

Date	Hours	Type	Description	Renewal
<a href="#">1/24/2019</a>	0	ALL TRN	All Tutor Training	00/00/00
<a href="#">1/24/2019</a>	0	DIV2 TRN	Diversity Training Level 2	00/00/00
<a href="#">8/21/2018</a>	0	ALL TRN	All Tutor Training	00/00/00
<a href="#">8/21/2018</a>	0	25 HRS	25 Tutoring Hours	00/00/00
<a href="#">8/21/2018</a>	0	CRLA	CRLA Level 1	00/00/00
<a href="#">1/16/2018</a>	0	ALL TRN	All Tutor Training	00/00/00
<a href="#">1/16/2018</a>	0	DIV TRN	Diversity Training	00/00/00
<a href="#">1/16/2018</a>	0	ONE	One-on-One	00/00/00
<a href="#">1/16/2018</a>	0	OBS	Observation	00/00/00
<a href="#">8/21/2017</a>	0	SAS TRN	Student Accessibility Training	00/00/00
<a href="#">8/21/2017</a>	0	ALL TRN	All Tutor Training	00/00/00
<a href="#">8/21/2017</a>	0	FOUND TRN	Foundations Training	00/00/00

Save Consultant  Available for ALL Specialties on Visit Entry Delete Consultant

## Consultant Certifications: The Set Up

As SysAdmin – Go to Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Consultants Tab -> choose specific consultant -> Certifications Tab -> click on 'create new' -> enter information for your certifications specific for your program -> Save -> Save Consultant

Examples:

Diversity Training, Observation



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Going Paperless with TutorTrac Using Consultant Certifications and Docs

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## Certifications

- What certification(s) targets are in place for your program(s)?
  
  
  
  
  
  
  
  
  
  
- Are there any specialized roles which should be recorded?

Consultant Certifications: The Set Up  
What certification(s) targets are in place for your program(s)?

Examples:

Training, Contact Hours,  
Observation



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# Employee Records Management: Certifications



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## Certifications

- What certification(s) targets are in place for your program(s)?
  
  
  
  
  
  
  
  
  
  
- Are there any specialized roles which should be recorded?

Consultant Certifications: The Set Up  
Are there any specialized roles which should be recorded?

Examples:

Lead Tutor, Science Center



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# Employee Records Management: Certifications

Report Chooser

Choose a report category and then a particular report.

Other

Students Document Followup List

Students Document Post List

Consultants by Specialties

Consultants by Subjects

Unassigned Section Specialties

Consultant Linked Centers

Consultant Certification Renewal

Consultant Certification Hours

Consultant Non-Duplicated Visit Time

Pick a center:

PEER TUTORING

Consultant Search...

From: 01/01/2017

To: 04/08/2019

Auto Recompute Dates

Certification Type: DIV 2 TRN

Certification SubType: ANY

Consultant Contact: None

Include SubType:

Include Description:

Include Total Hours:

Only include consultants with certifications

Generate

Format: HTML Delivery: Screen

Save new favorite

Allow group access

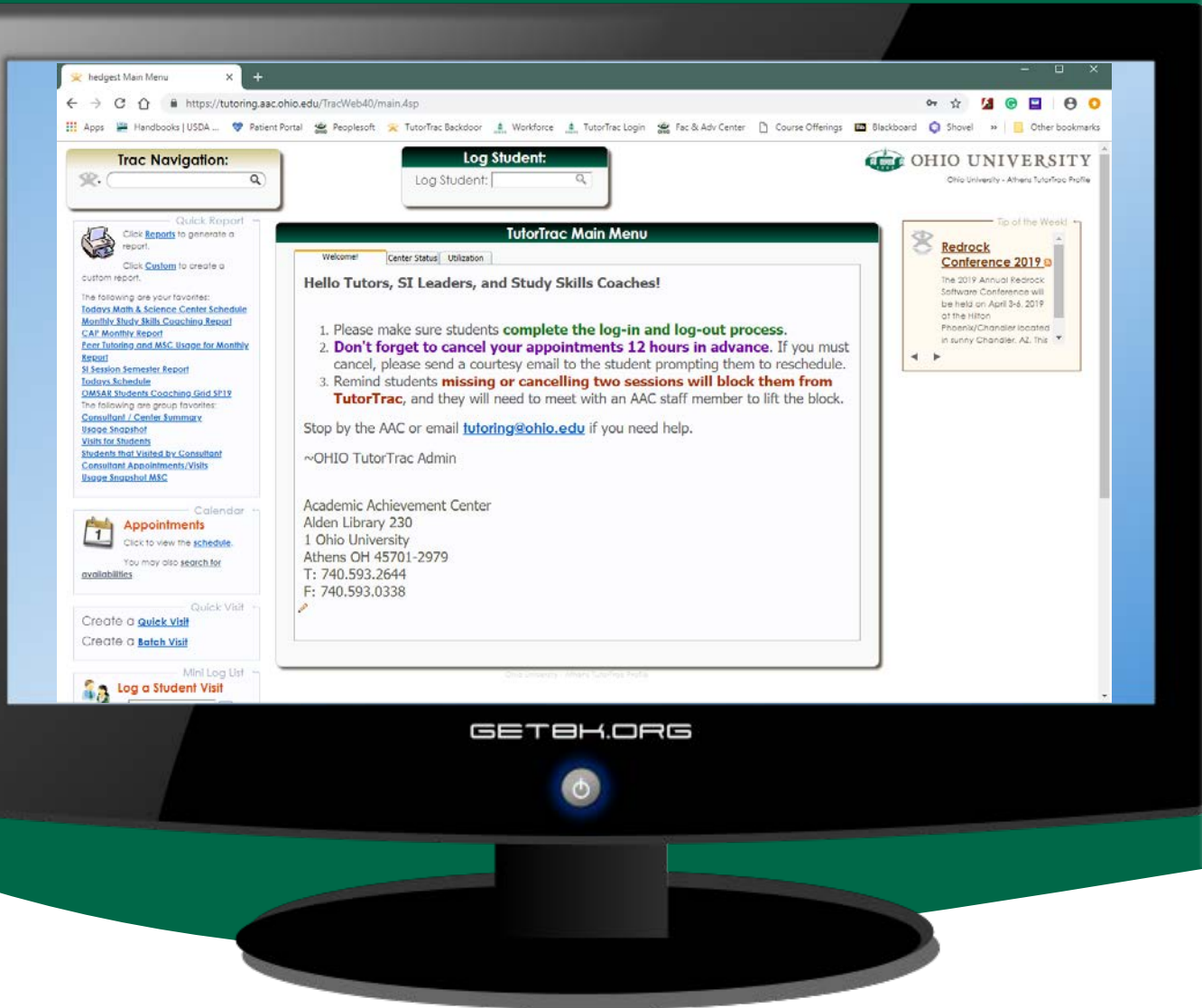
## Consultant Certifications: Reports

With Access Rights – Go to Trac Navigation -> Tracman Icon -> Reports -> select 'Other' from dropdown, choose 'Consultant Certification Hours' and pick center from dropdown choices, range of dates, certification type, and other information to be in the report -> click 'Generate'



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# Employee Records Management: Certifications



## Consultant Certifications:

- Input Certification Type
- Maintain Accurate Lists
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# What questions do you have?

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<http://www.ohio.edu/tutoring>



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