Profile Maintenance (PM): Add New and Edit Non-Employee Profile Job Aid

Talent Management System

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ADD NEW NON-EMPLOYEE PROFILE

There are a number of reasons why one would create and edit a VA Talent Management System (TMS) user profile manually using the Profile Maintenance (PM) utility.

1. Since employee information is added to the Educational Data Repository (EDR) via a feed from our Human Resources (HR) system of record, there can be a significant delay between the time that new employees arrives at a VA station and the time when their User profiles are automatically created in the EDR. It is desirable to have the employee user profile created in the EDR/TMS prior to arrival of a new employee so that the employee can complete mandatory training prior to being given access to other VA systems and because at some stations New Employee Orientation is partially conducted using the TMS.
2. VA currently has no data source for non-employee TMS user profiles. While the majority of new non-employee TMS user profiles are created using the Managed Self-Enrollment (MSE) capability offered by the TMS, some stations choose to manually create these user profiles using PM for the same reasons they might manually create an employee profile.
3. All user profiles, including those non-employee profiles created and validated in the TMS using MSE, need regular maintenance over time. Those updates are completed by editing the user profiles using PM.

This job aid will assist you in adding and editing a new non-employee profile in Profile Maintenance. For this example, a contractor employee type will be used. First, the fields and steps needed to create a new non-employee profile are explained and outlined. Second, the process for editing a non-employee is explained.

User Profile

Using a web browser, navigate to:
https://vaww.tmsadmin.aac.va.gov/ProfileMaintenance/default.aspx

Select the **Add New User Profile** link. The ADD Form displays.

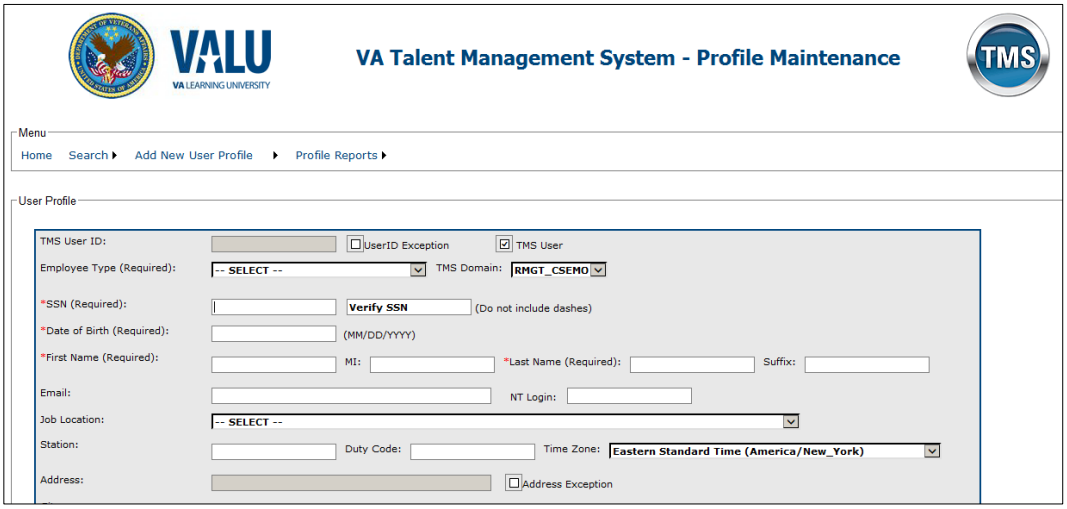


Figure 1 – VA TMS Profile Maintenance Add New User Profile Home Screen

TMS User ID | User ID Exception | TMS User

Once the form opens, the **TMS User ID** field should be inaccessible. The **User ID Exception** checkbox is used to override the automatically generated UserID, and the **TMS User** checkbox should remain checked.

Employee Type | TMS Domain

The **Employee Type** field is a required field; select the type from the dropdown**. TMS Domain** defaults to your domain. If needed, you can select a different domain from the **TMS Domain** dropdown list. If you choose to change the default TMS domain that is offered, you should pause for a couple of seconds as the screen will refresh with associated other data.

Note: In this job aid, we are using the CONTRACTOR Employee Type as an example. If you are creating a profile for a non-employee of a different Employee Type, you should select the appropriate option from the Employee Type drop-down menu.

SSN

The **SSN** (Social Security Number) field is a required field; enter an SSN. Ensure the SSN displays correctly in the **Verify SSN** area.

The steps to complete the **TMS User ID, User ID Exception, TMS User, Employee Type, TMS Domain,** and **SSN** fields are listed in the table below.

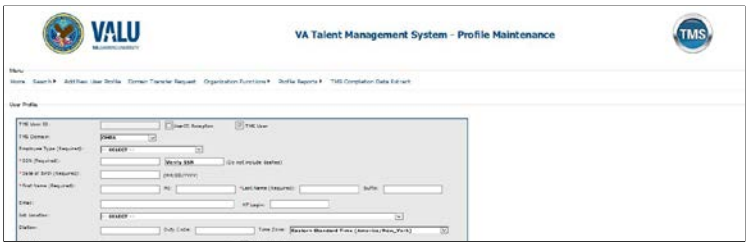
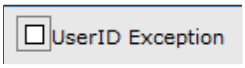
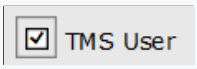
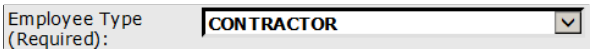
STEP	ACTION	DETAILS
1	Select the **Add New User Profile** link. The ADD Form displays.	
2	The **TMS User ID** field should be inaccessible. Ensure you cannot access this field.	
3	Verify the **User ID Exception** checkbox is not selected.	
4	Verify the **TMS User** checkbox is selected.	
5	From the **Employee Type (Required)** dropdown list, select the appropriate employee type.	
6	Verify the **TMS Domain** field has defaulted to your domain. If necessary, select a different domain from the **TMS Domain** dropdown list.	
7	Enter the non-employee's SSN (do not include dashes) into the **SSN (Required)** field.	
8	Roll your mouse over the **Verify SSN** area to display the SSN and ensure it has been entered correctly.	

Table 1 – Add New Non-Employee User Profile Steps 1-8

Date of Birth

The **Date of Birth** is a required field; enter a date of birth following the MM/DD/YYYY format.

First Name | MI | Last Name | Suffix

The **First Name** and **Last Name** fields are required fields. If desired, you may enter a middle initial (MI) and/or a suffix in the **MI** and **Suffix** fields**.**

Email | NT Login

Enter the non-employee's **Email**.

Enter an NT Login in the **NT Login** field, if known. (Note: NT Login is the user name that one uses to login to VA Desktops.)

The steps to complete the **Date of Birth, First Name, MI, Last Name, Suffix, Email,** and **NT Login** fields are listed in the table below.

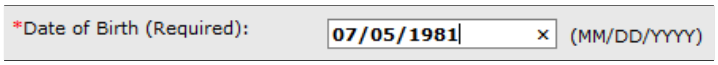
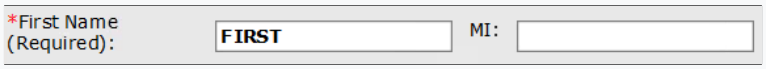
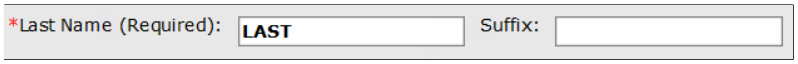
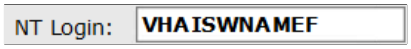
STEP	ACTION	DETAILS
9	Enter the non-employee's date of birth in the **Date of Birth (Required)** field, making sure to follow the MM/DD/YYYY format.	
10	Enter the non-employee's first name in the **First Name (Required)** field. If desired, enter the middle initial in the **MI** field.	
11	Enter the non-employee's last name in the **Last Name (Required)** field. If desired, enter their suffix in the **Suffix** field.	
12	Enter the non-employee's email address in the **Email** field.	
13	If known, enter the non-employee's NT Login in the **NT Login** field.	

Table 2 – Add New Non-Employee User Profile Steps 9-13

Job Location

Select the appropriate option from the **Job Location** dropdown list. Selection of a job location will trigger the population of other data on the screen, so you should pause for a couple of seconds as the screen is refreshed with that associated data.

Station | Duty Code | Time Zone

The station is automatically generated based on the selected job location; verify that the correct station is displayed in the **Station** field. If it is not correct, access this field to make changes.

The duty code is automatically generated based on the selected job location; verify that the correct duty code is displayed in the **Duty Code** field. If it is not correct, access this field to make changes.

The time zone is automatically generated based on the selected job location; verify that the correct time zone is displayed in the **Time Zone** field. If it is not correct, select the appropriate option from the dropdown list.

Address | Address Exception | City | State | Zip

The Address, City, **State** and **Zip** fields are all automatically populated based on the selected job location. These fields should not immediately be accessible.

Note: These fields can be made accessible if the **Address Exception** checkbox is selected. In the event that the individual's actual address differs from that assigned to the job location, select the **Address Exception** checkbox and edit the necessary address information. An individual's address entry in PM and in the TMS should reflect their office location, not a home address.

The steps to complete the **Job Location, Station, Duty Code, Time Zone, Address, Address Exception, City, State,** and **Zip** fields discussed are listed in the table below.

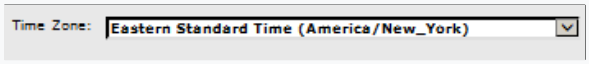
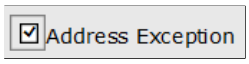
STEP	ACTION	DETAILS
14	Select an option from the **Job Location** dropdown list. Your selection will auto-populate the **Station, Duty Code, Address, City, State,** and **Zip** fields when default information exists for that location in the database.	
15	Verify the correct station is displayed. If it is not correct, access the **Station** field and enter the correct information.	
16	Verify the correct duty code is displayed. If it is not correct, access the **Duty Code** field and enter the correct information.	
17	Verify the correct time zone is displayed. If it is not correct, select the appropriate time zone from the **Time Zone** dropdown list.	
18	Verify the address, city, state, and zip code are correct. If changes are needed, select the **Address Exception** checkbox to make these fields accessible and make the needed updates.	

Table 3 – Add New Non-Employee User Profile Steps 14-18

Job Title | Phone 1 Type | Phone 2 Type | Phone 3 Type

Enter any appropriate job title information into the **Job Title** field. Previously, this information was directly associated with an individual's job position as reported via PAID, but this field now can be manually managed through PM and via the TMS interface. This information will NOT be overwritten by a VA HR feed. An individual's job title should reflect the role that individual plays in their organization (e.g., "Project Manager" or "Lawn Care Specialist").

Identify the type of phone number in the **Phone 1 Type** textbox. This typically will be the Office Phone. Input the corresponding phone number in the **Number** field.

As needed, identify the type of phone number in the **Phone 2 Type** textbox. This typically will be the Office Mobile Phone. Input the corresponding phone number in the **Number** field.

As needed, identify the type of phone number in the **Phone 3 Type** textbox. This typically will be the Cell Phone. Input the corresponding phone number in the **Number** field.

Note: All phone number entries should be work-related and not home or personal numbers.

The steps to complete the **Job Title** and **Phone Type** fields are listed in the table below.

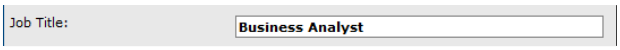
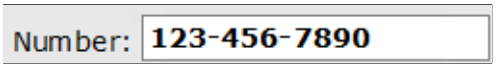
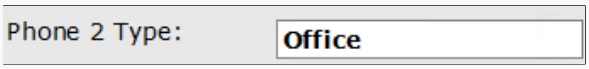
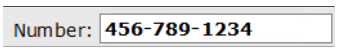
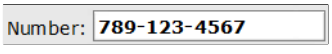
STEP	ACTION	DETAILS
19	Enter the job title in the **Job Title** field.	
20	Enter the phone type in the **Phone 1 Type** field.	
21	Enter the phone number in the **Number** field for phone 1.	
22	As needed, enter a phone type in the **Phone 2 Type** field.	
23	Enter the phone number in the **Number** field for phone 2.	
24	As needed, enter a phone type in the **Phone 3 Type** field.	
25	Enter the phone number in the **Number** field for phone 3.	

Table 4 – Add New Non-Employee User Profile Steps 19-25

VA Organization | T&L Unit

The **VA Organization** is a required field. Please make the appropriate selection from the dropdown list. The **T&L Unit** field is populated only for government employees. Leave this field empty and the TMS will receive the value of DOMAIN.NVA (non-VA).

TMS User Role

You should not have access to the **TMS User Role** field as this information is determined by the Employee Type selected earlier.

Supervisor

You may either enter the employee's supervisor TMS User ID in the **Supervisor** field or use the *Search* function to locate the supervisor. Note: For a contractor, this should be the Contracting Officer's Representative (COR) for the contract.

The steps to complete the **VA Organization, T&L Unit, TMS User Role,** and **Supervisor** fields are listed in the table below.

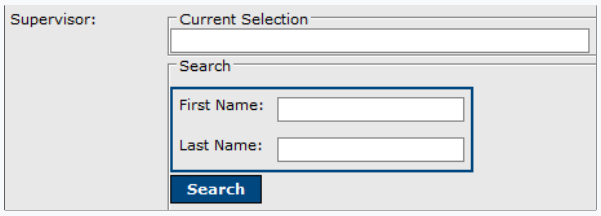
STEP	ACTION	DETAILS
26	Select a VA organization from the **VA Organization (Required)** dropdown list.	
27	For non-employee profiles, leave the **T&L Unit** field blank.	
28	Verify the **TMS User Role** field has defaulted to INTERNAL Note: This is the correct role for the CONTRACTOR Employee Type, but will be different for other Employee Types.	
29	Enter the non-employee's supervisor's first and last name in the **First Name** and **Last Name** fields and select **Search** to locate the supervisor.	

Table 5 – Add New Non-Employee User Profile Steps 26-29

Profile Maintenance User/Level

The **Profile Maintenance User/Level** checkbox should NOT be checked. Contractors and other non-employees should not be granted Profile Maintenance User (administrative) access.

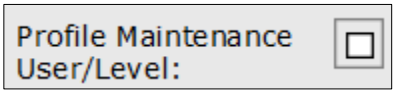


Figure 2 – Profile Maintenance User/Level

Comments

You may enter any user profile comments in the **Comments** textbox.

Figure 3 – User Profile Comments

EHRI and Other

Skip the EHRI and Other area of the form. This is NOT relevant to non-VA employees.

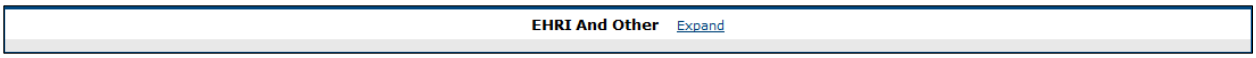


Figure 4 – EHRI and Other Section

Managed Self-Enrollment (MSE)

Generally, a non-employee will use the Managed Self Enrollment (MSE) capability in TMS to create their own TMS account. When they do, the fields displayed below will be populated during that enrollment and are used primarily to help TMS administrators identify those non-employees during the TMS user profile validation process. In those instances when it is necessary for a PM administrator to create a non-employee account, these fields can be populated by the administrator, if desired.

If not already expanded, you will need to select the **Expand** link on the MSE area of the form. All of the fields on this form should be accessible to you.

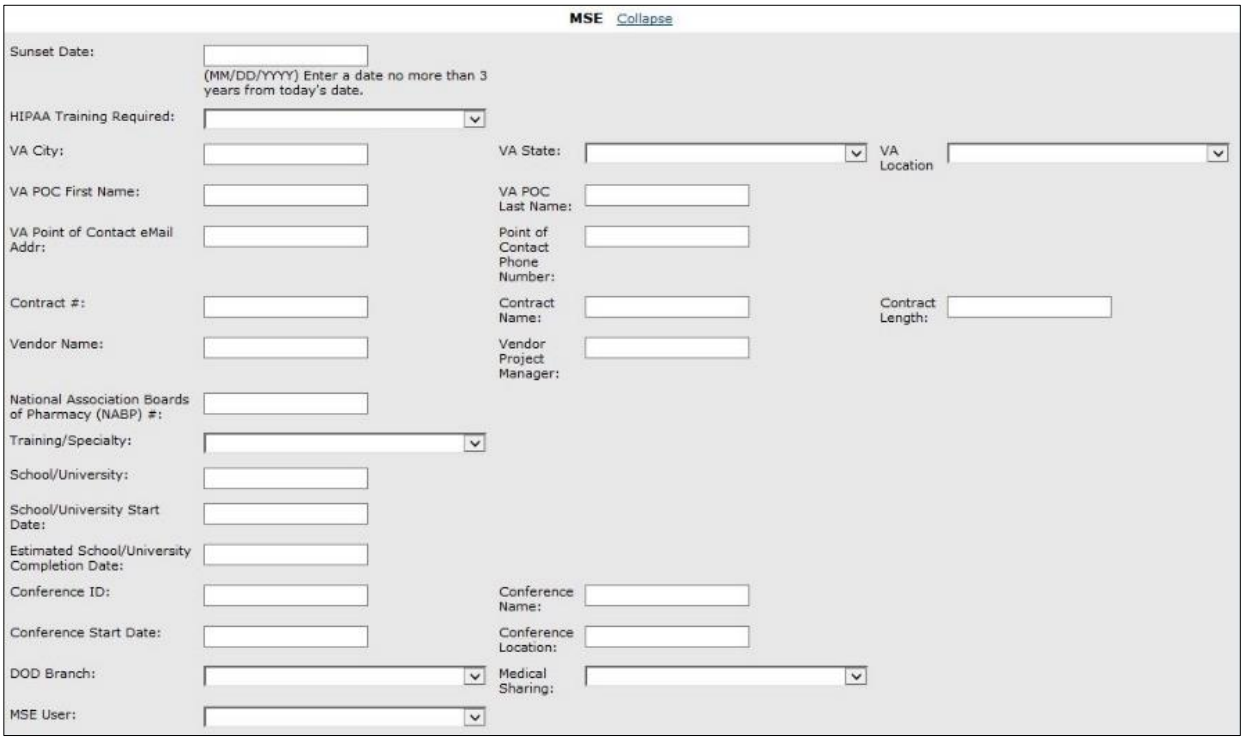


Figure 5 – Managed Self Enrollment (MSE)

Sunset Date

Enter a sunset date in the **Sunset Date** field. This date indicates the end date of the individual's time working with VA (e.g., the end date of a contract period of performance).

Updated feature: The sunset date had previously been limited to one year from the current date, but this feature has been extended to allow for entry of a date up to three (3) years from the current date.

Automatic processing will deactivate the non-employee's account in the TMS if the current date exceeds the sunset date.

HIPAA Training Required

The **HIPAA Training Required** dropdown list is used to indicate that the non-employee is required to take annual HIPAA training. Make the appropriate selection.

VA City | VA State | VA Location

Enter the city for where the non-employee is working in the **VA City** field. Select the corresponding state from the **VA State** dropdown list. Select the corresponding location from the **VA Location** dropdown list. (This will typically align with a user's TMS domain.)

The steps to complete the **Sunset Date, HIPAA Training Required, VA City, VA State,** and **VA Location** fields are listed in the table below.

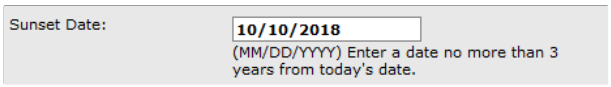
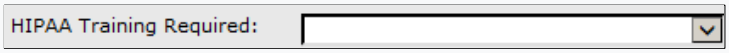
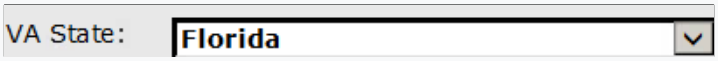
STEP	ACTION	DETAILS
30	Enter a sunset date using the MM/DD/YYYY format in the **Sunset Date** field.	
31	Select the **HIPAA Training Required** option from the dropdown list.	
32	Enter the city for where the non-employee is working in the **VA City** field.	
33	Select the state from the **VA State** dropdown list.	
34	Select the location from the **VA Location** dropdown list.	

Table 6 – Add New Non-Employee MSE Steps 30-34

VA POC First Name | VA POC Last Name

Enter the first name for the VA point of contact (POC) in the **VA POC First Name** field. Enter the last name for the VA POC in the **VA POC Last Name** field.

Note: This is the VA person who has administrative responsibility for the user account (e.g., for a contractor, this should always be the Contracting Officer's Representative (COR) on their contract).

VA Point of Contact eMail Addr | Point of Contact Phone Number

Enter the e-mail address for the VA point of contact in the **VA Point of Contact eMail Addr** field. Enter the phone number for the VA point of contact in the **Point of Contact Phone Number** field. This should reflect the contact information for the individual entered in the previous step.

The steps to complete the **VA POC First Name, VA POC Last Name, VA Point of Contact eMail Addr,** and **Point of Contact Phone Number** fields are listed in the table below.

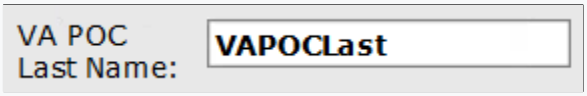
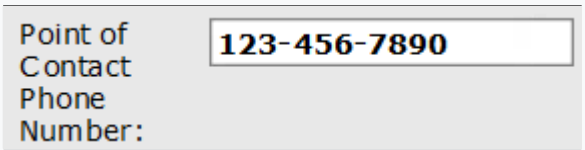
STEP	ACTION	DETAILS
35	Enter VA POC first name in the **VA POC First Name** field.	
36	Enter VA POC last name in the **VA POC Last Name** field.	
37	Enter VA point of contact eMail address in the **VA Point of Contact eMail Addr** field.	
38	Enter VA point of contact phone number in the **Point of Contact Phone Number** field.	

Table 7 – Add New Non-Employee MSE Steps 35-38

Contract # | Contract Name | Contract Length

Only use these fields for CONTRACTORS. Enter the contract number in the **Contract #** field. Enter the contract name in the **Contract Name** field. Enter the contract length in the **Contract Length** field.

Vendor Name | Vendor Project Manager

Only use these fields for CONTRACTORS. Enter the vendor name in the **Vendor Name** field. Enter the name of the vendor project manager in the **Vendor Project Manager** field.

The steps to complete the **Contract #, Contract Name, Contract Length, Vendor Name,** and **Vendor Project Manager** fields are listed in the table below.

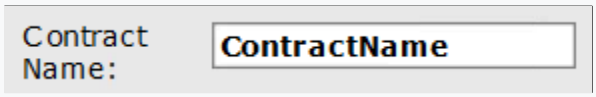
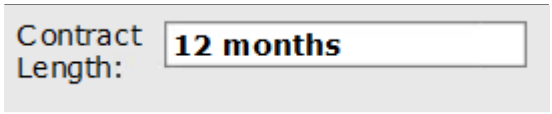
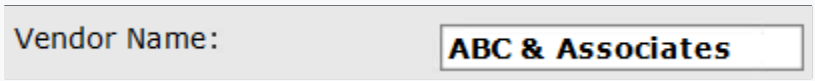
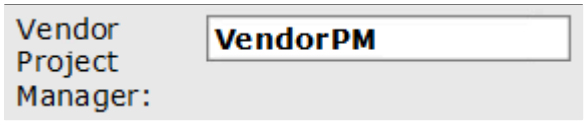
STEP	ACTION	DETAILS
39	Enter contract number in the **Contract #** field.	
40	Enter contract name in the **Contract Name** field.	
41	Enter contract length in the **Contract Length** field.	
42	Enter vendor name in the **Vendor Name** field.	
43	Enter vendor project manager name in the **Vendor Project Manager** field.	

Table 8 – Add New Non-Employee MSE Steps 39-43

National Association Boards of Pharmacy (NABP)

The **National Association Boards of Pharmacy (NABP) #** field does not apply to all non-employees. When not applicable, leave blank. When appropriate, fill in with the individual's NABP#.

Training/Specialty

The **Training/Specialty** field only applies to a Health Professional Trainee (HPT). When entering an HPT profile, select the appropriate combination from the dropdown. Otherwise, leave blank.

Note:

School/University

The **School/University** field only applies to an HPT. When entering an HPT profile, enter the individual's school/university information. Otherwise, leave blank.

School/University Start Date

The **School/University Start Date** field only applies to an HPT. When entering an HPT profile, enter the individual's school/university start date. Otherwise, leave blank.

Estimated School/University Completion Date

The **Estimated School/University Completion Date** field only applies to an HPT. When entering an HPT profile, enter the individual's school/university completion date. Otherwise, leave blank.

The steps to complete the **National Association Boards of Pharmacy (NABP) #, Training/Specialty, School/University, School/University Start Date,** and **Estimated School/University Completion Date** fields are listed in the table below.

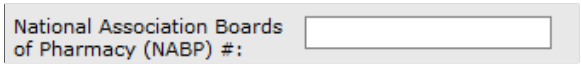
STEP	ACTION	DETAILS
44	Enter National Association Boards of Pharmacy number in the **National Association Boards of Pharmacy (NABP) #** field, if appropriate. Otherwise, leave blank.	
45	If the individual is an HPT, select the appropriate training/specialty from the **Training/Specialty** field dropdown. Otherwise, leave blank.	
46	If the individual is an HPT, enter the appropriate school/university information in the **School/University** field. Otherwise, leave blank.	
47	If the individual is an HPT, enter the school/university start date information in the **School/University Start Date** field. Otherwise, leave blank.	
48	If the individual is an HPT, enter the estimated school/university completion date information in the **Estimated School/University Completion Date** field. Otherwise, leave blank.	

Table 9 – Add New Non-Employee MSE Steps 44-48

Conference ID| Conference Name

The **Conference ID** field should be left blank for all non-employees except those with an employee type of Conference Attendee.

Note: If you are entering/adding a Conference Attendee, then enter the conference ID the individual is attending/has attended.

The **Conference Name** field should be left blank for all non-employees except those with an employee type of Conference Attendee.

Note: If you are entering/adding a Conference Attendee, then enter the name of the conference the individual is attending/has attended.

Conference Start Date| Conference Location

The **Conference Start Date** field should be left blank for all non-employees except those with an employee type of Conference Attendee.

Note: If you are entering/adding a Conference Attendee, then enter the start date of the conference the individual is attending/has attended.

The **Conference Location** field should be left blank for all non-employees except those with an employee type of Conference Attendee.

Note: If you are entering/adding a Conference Attendee, then enter the location of the conference the individual is attending/has attended.

DOD Branch | Medical Sharing

The **DOD Branch** dropdown should be left blank for all non-employees except those with an employee type of Department of Defense (DOD).

Note: If you are entering/adding an individual with the DOD employee type, then select the appropriate DOD branch value from the dropdown.

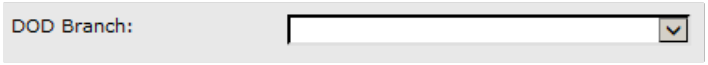
The **Medical Sharing** dropdown should be left blank for all non-employees except those with an employee type of Department of Defense.

Note: If you are entering/adding an individual with the DOD employee type, then select the appropriate medical sharing value from the dropdown.

MSE User

The **MSE User** dropdown should be left blank when adding a non-employee via PM.

The steps to complete the **Conference ID, Conference Name, Conference Start Date, Conference Location, DOD Branch, Medical Sharing,** and **MSE User** fields are listed in the table below.

STEP	ACTION	DETAILS
49	Leave the **Conference ID** field blank. If the employee type is Conference Attendee, then enter the information in the **Conference ID** field.	
50	Leave the **Conference Name** field blank. If the employee type is Conference Attendee, then enter the information in the **Conference Name** field.	
51	Leave the **Conference Start Date** field blank. If the employee type is Conference Attendee, then enter information in the **Conference Start Date** field.	
52	Leave the **Conference Location** field blank. If the employee type is Conference Attendee, then enter information in the **Conference Location** field.	
53	Leave the **DOD Branch** field blank. If the employee type is Department of Defense, then select the appropriate DOD branch from the dropdown list.	
54	Leave the **Medical Sharing** field blank. If the employee type is Department of Defense, then select the appropriate medical sharing value from the dropdown list.	
55	Leave the **MSE User** field blank.	
56	Select the **Submit** button to create and save this record.	

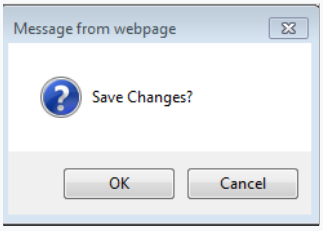
STEP	ACTION	DETAILS
57	If you were unsuccessful, fix the errors indicated by the onscreen messages and select **Submit.** Continue until you are successful.	
58	When the *Message from webpage* prompt displays, select **OK** to save changes.	

Table 10 – Add New Non-Employee MSE Steps 49-58

EDIT NON-EMPLOYEE PROFILE

It is not uncommon that the need may arise to make changes in the information contained within a non-employee profile in the TMS. As we do NOT allow editing of such information directly within the TMS, Profile Maintenance is the place to make these changes.

Search Options

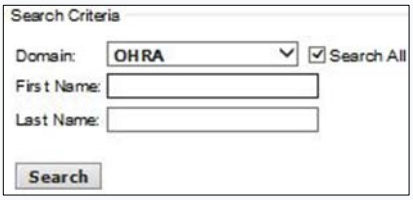
Using a web browser, navigate to:
https://vaww.tmsadmin.aac.va.gov/ProfileMaintenance/default.aspx

Select the **Search** link located at the top of the page to display the available search options. Then you will select one of the four search types to locate the non-employee's Profile Maintenance record: **Search by Name; Search by Email Address; Search by SSN;** or **Search by Person ID.**

Figure 6: Search Types

Search by Name

To conduct a search for non-employees by their first and last names, follow the steps provided in the table below.

STEP	ACTION	DETAILS
1	Select **Search by Name** in the Search Types section.	
2	The **Search Criteria** text entry fields appear.	

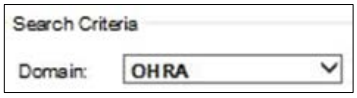
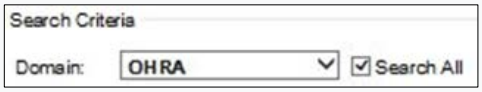
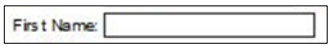
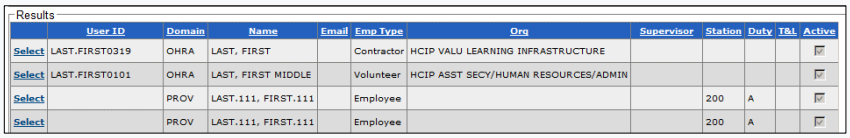
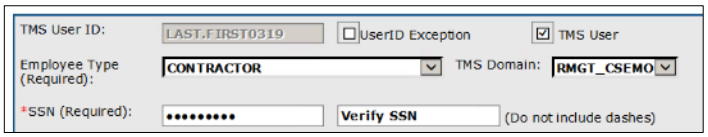
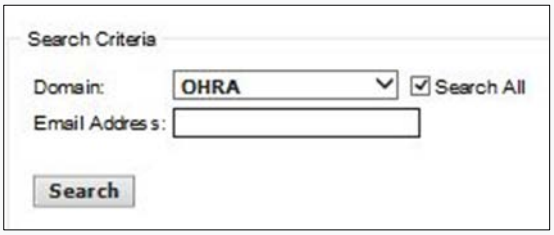
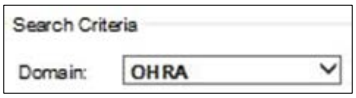
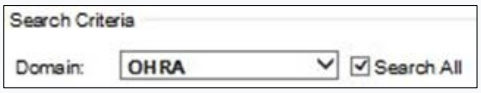
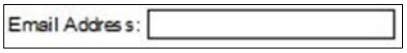
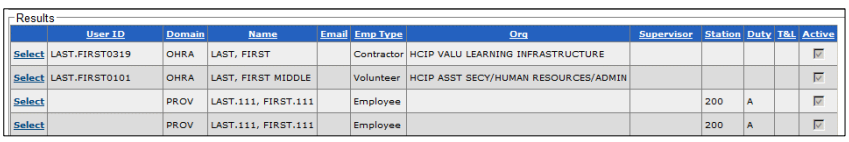
STEP	ACTION	DETAILS
3	Select the appropriate domain from the **Domain** drop down list.	
4	If you want to search the entire selected domain, select the **Search All** checkbox.	
5	Enter the non-employee's first name in the **First Name** field.	
6	Enter the non-employee's last name in the **Last Name** field.	
7	Select **Search**.	
8	When the search results appear, select the **Select** link next to the desired non-employee record to navigate to that record.	
9	The selected non-employee User Profile record displays. You can now begin to edit the record.	

Table 11 – Search by Name

Search by Email Address

To conduct a search for non-employees by their email addresses, follow the steps provided in the table below.

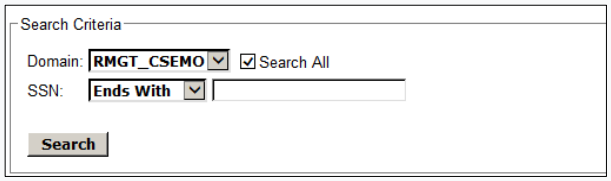
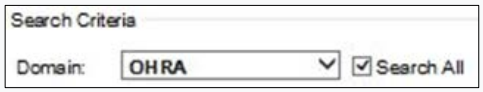
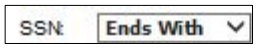
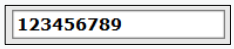
STEP	ACTION	DETAILS
1	Select **Search by Email Address.**	
2	The **Search Criteria** text entry fields appear.	
3	Select the appropriate domain from the **Domain** drop down list.	
4	If you want to search the entire selected domain, select the **Search All** checkbox.	
5	Enter the non-employee's email address in the **Email Address** field.	
6	Select **Search**.	
7	When the search results appear, select the **Select** link next to the desired non-employee record to navigate to that record.	

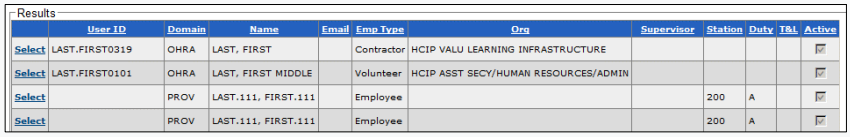
STEP	ACTION	DETAILS
8	The selected non-employee User Profile record displays. You can now begin to edit the record.	

Table 12 – Search by Email Address

Search by Social Security Number (SSN)

To conduct a search for non-employees by their Social Security Numbers (SSN), follow the steps provided in the table below.

STEP	ACTION	DETAILS
1	Select **Search by SSN**.	
2	The **Search Criteria** text entry fields appear.	
3	Select the appropriate Domain from the **Domain** drop down.	
4	If you want to search the entire selected domain, select the **Search All** checkbox.	
5	Select the type of SSN search to conduct by selecting the **SSN** search criteria drop down.	
6	Enter the non-employee's SSN in the **SSN** field.	
7	Select **Search**.	

STEP	ACTION	DETAILS
8	When the search results appear, select the **Select** link next to the desired non-employee record to navigate to that record.	
9	The non-employee record displays. Now you can begin to edit the record.	

Results

	User ID	Domain	Name	Email	Emp Type	Org	Supervisor	Station	Duty	T&L	Active
Select	LAST.FIRST0319	OHRA	LAST, FIRST		Contractor	HCIP VALU LEARNING INFRASTRUCTURE					☑
Select	LAST.FIRST0101	OHRA	LAST, FIRST MIDDLE		Volunteer	HCIP ASST SECY/HUMAN RESOURCES/ADMIN					☑
Select		PROV	LAST.111, FIRST.111		Employee			200	A		☑
Select		PROV	LAST.111, FIRST.111		Employee			200	A		☑

TMS User ID: LAST.FIRST0319 ☐ UserID Exception ☑ TMS User
Employee Type (Required): CONTRACTOR TMS Domain: RMGT_CSEMO
*SSN (Required): ••••••••• Verify SSN (Do not include dashes)

Table 13 – Search by Social Security Number

Search by Person ID (PID)

To conduct a search for non-employees by their Person ID (PID), follow the steps provided in the table below.

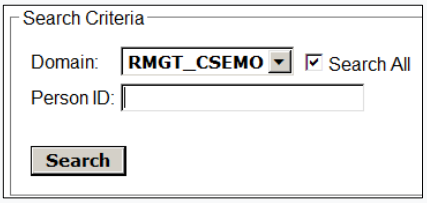
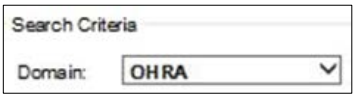
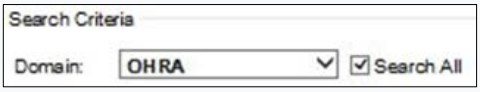
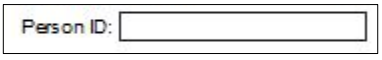
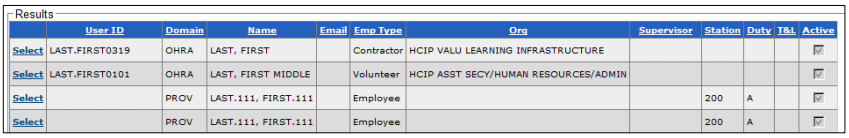
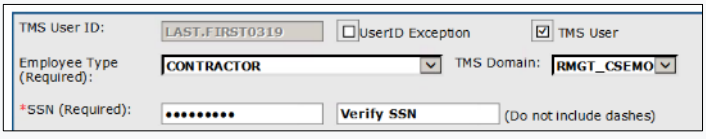
STEP	ACTION	DETAILS
1	Select **Search by Person ID**.	
2	The **Search Criteria** text entry fields appear.	
3	Select the appropriate domain from the **Domain** drop down list.	
4	If you want to search the entire selected domain, select the **Search All** checkbox.	
5	Enter the non-employee's Person ID in the **Person ID** field.	
6	Select **Search**.	
7	When the search results appear, select the **Select** link next to the desired non-employee record to navigate to that record.	
8	The non-employee record displays. Now you can begin to edit the record.	

Table 14 – Search by Person ID

Edit User Profile

In the PM interface, most fields in the top section of the User Profile are accessible in the Edit form so you can make any required changes and updates to the data in them. Some fields, such as the **TMS User Role** field, will be permanently greyed out, making it impossible to edit them. Other fields will be initially greyed out, such as the **Address** field, with the option of making them editable by using an associated "exception" checkbox.

Note: The TMS User ID can be edited once the **UserID Exception** checkbox is checked.

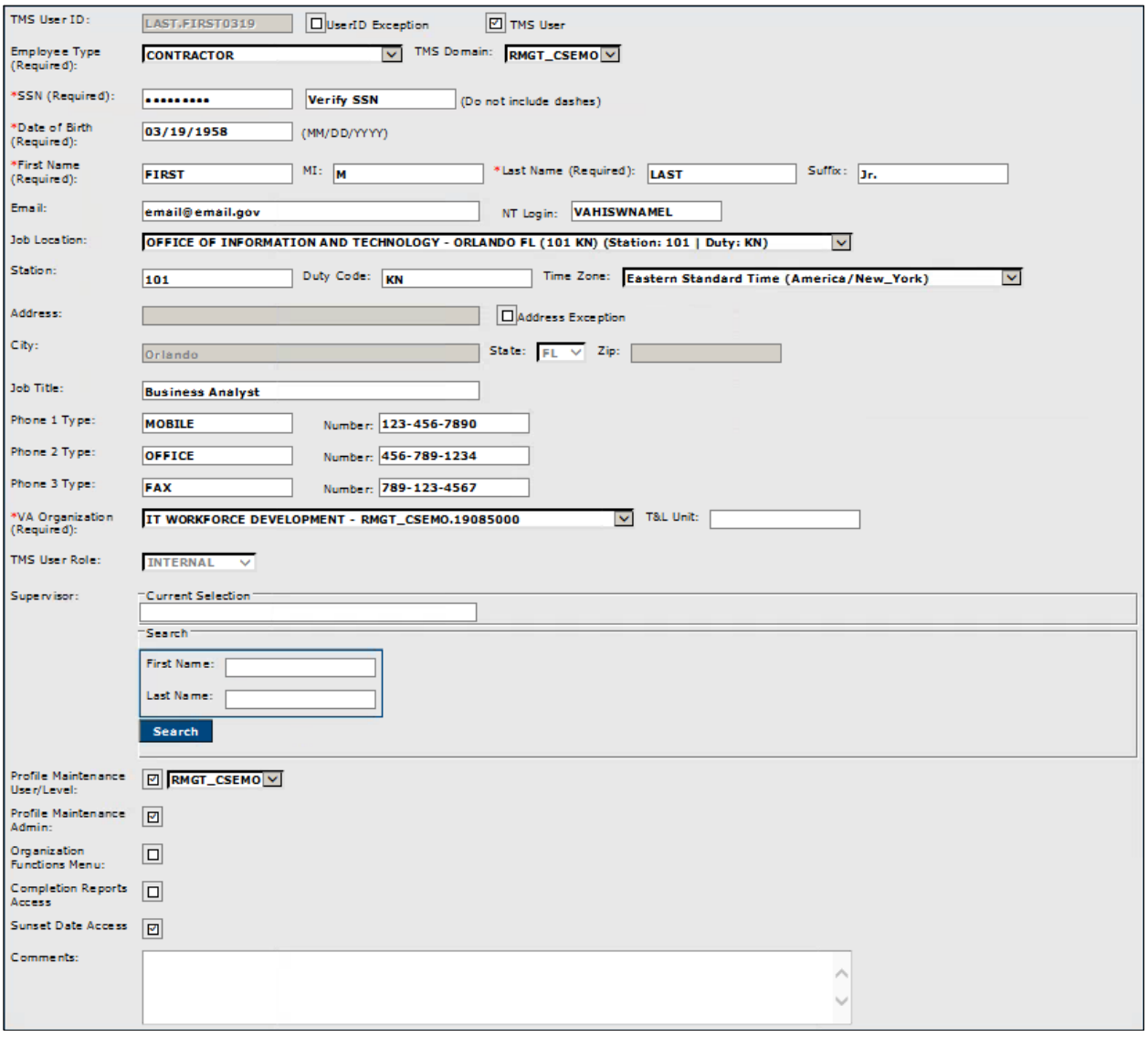


Figure 7 Contractor User Profile Example

Edit EHRI and Other

Skip the EHRI and Other area of the form. This is NOT relevant to non-VA employees.

Edit MSE

Scroll down to the **Expand** link in the MSE section of the form. Select the **Expand** link; the MSE area of the form displays.

All fields in MSE are accessible and editable.

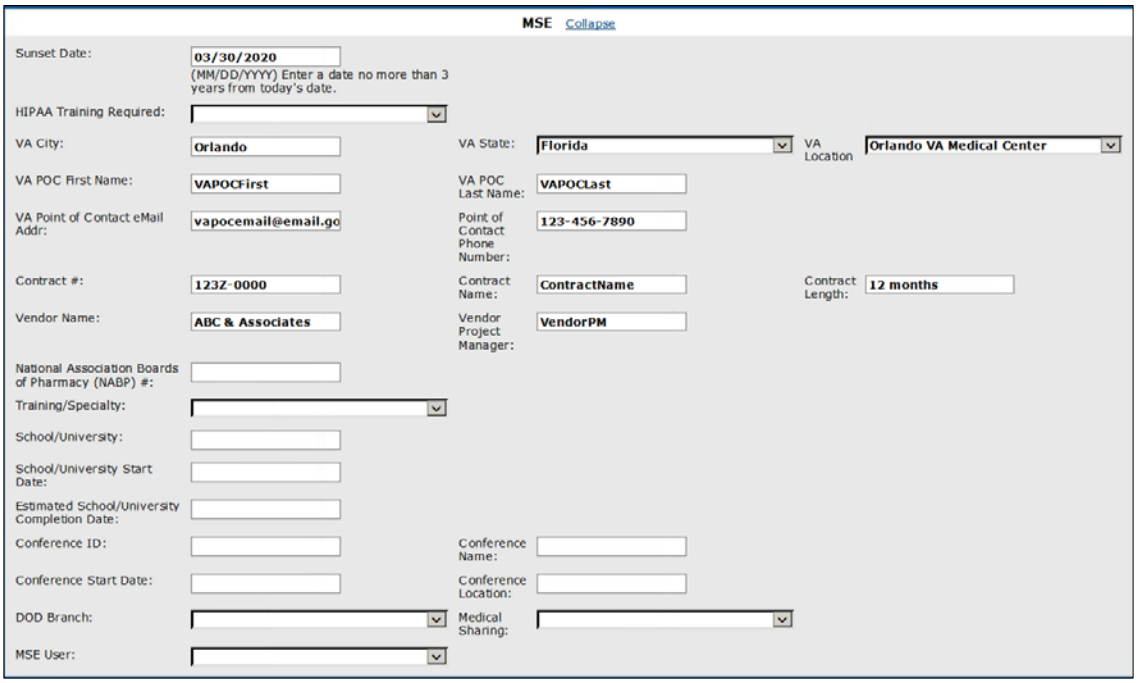


Figure 8 MSE Example

After making changes, review, and then save changes by selecting the **Submit** button. The *Message from webpage* window prompt displays. Select **OK** to save the changes and close the record.

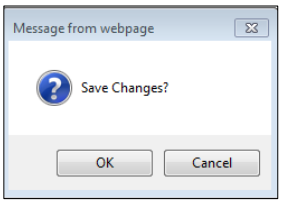


Figure 9 Save Changes?

You have reached the end of the Profile Maintenance: Add New and Edit Non-Employee Profile Job Aid