

EHS Training Reconciliation Quick Guide

Navigate to EHS Training Reconciliation

1. From https://web.mit.edu/training/learning_center.html select the 'EHS Training Tools' tab at the top of the page
2. Click on the 'EHS Training Functions' on the left navigation
3. Click on 'Training Reconciliation'

The Training Reconciliation function is used by Training Reconcilers, typically an EHS Rep, to confirm, edit or create a relationship between an individual and a PI or Supervisor for the purpose of training. EHS Coordinators will use this function to assign new Training Reconcilers and can also create and edit relationships between trainees and PIs. EHS Lead Contacts have the same authorizations as Coordinators. The EHS Training Needs DLC Reconciler can be assigned to edit Reconcilers and trainees for an entire DLC.

To View Reconcilers and/or Trainees

PI/Supervisor Affiliation

- To view PIs for a DLC, click the arrow next to the DLC name.
- To view affiliations and reconcilers for a PI, click the arrow next to the PI name.

PI Affiliations by DLC

▶ CENTER FOR MATERIALS SCIENCE & ENGINEERING

▼ DEPT MATERIAL SCIENCE AND ENGINEERING

PIs for Dept Material Science and Engineering

▼ ALLEN, SAMUEL MILLER

Trainees last reconciled on: 10/03/2011

Edit Trainees ▶ Reconciliation Complete

Trainee	Kerberos ID	Status
Tester, Qa023	qa023	New
Wen, Hao	hwwen	New
Hewitt, Kenneth L	khewitt	Active
Meyer, Inge	imeyer	Active

Reconciler
Allen, Samuel Miller
Tarkanian, Michael J
White, Jane F

Click **Training Reconciliation** under EHS Training Functions on the EHS Training Tools tab of the MIT Learning Center page. The **PI/Supervisor Affiliation** screen will appear.

Click the ▶ to open a DLC and see PI names. You may only see one DLC or one PI Name.

Click the ▶ next to a PI or Supervisor name to see a list of Training Reconcilers and/or.

Note: EHS Coordinators and Lead Contacts will see Reconcilers and Trainees. Reconcilers will only see and be able to edit Trainees for whom they are responsible.

To Review or Edit a New Trainee

The most frequent use of the Training Reconciliation function will be to confirm the status of a new trainee. Although Reconcilers can manually enter trainees into the system, the system automatically adds a trainee into the system when they complete their online EHS Training Needs. Reconcilers can check the list of trainees associated with their PI/Supervisor at any time, but will be sent an email reminder twice a year to update the list of trainees. The default months for this are October and June but departments can choose two months that are better suited to their schedules.

Training Reconciliation

Add/Edit Trainees for GREENLEY, PAMELA - ENVIRONMENT, HEALTH AND SAFETY OFFICE

Status	Definition
New	When someone completes their Training Needs Assessment, their status is marked "New". Change their status to confirm (Active) or reject (Incorrect) that they work for your PI / Supervisor.
Active	Confirm that all researchers who currently work for your PI have their status set to "Active." This is also the status that will be displayed for anyone you add via the "Add Trainee" function.
Inactive	If a researcher no longer works for your PI's lab, either permanently or temporarily, change their status from "Active" to "Inactive". If they return, change their status back to "Active".
Incorrect	If a researcher incorrectly selected your PI when they completed their Training Needs Assessment and has no affiliation with your lab or work area, change their status from "New" to "Incorrect".

◀ Back Save Reconciliation Complete

Trainees

Trainees last reconciled on: 03/17/2012

To reassign a person in your lab to a different PI, click the Reassign button. A list of trainees to be reassigned is show at the bottom of the page. Click the linked trainee kerberos ID to view a training summary.

Add Trainee

Trainee	Kerberos ID	Current Status	New	Active	Inactive	Incorrect	Reassign
Licikas, Abigail	allicikas	New	⊕	○	○	○	Reassign
Sawo, Michael	msawo	New	⊕	○	○	○	Reassign
Beaulieu, Tim	tom_b	Active	○	⊕	○	○	Reassign
Doherty, Nancy E	ndoherty	Active	○	⊕	○	○	Reassign

On the **PI/Supervisor Affiliation** screen click the **Edit Trainee** button. The **Trainees: Add/ Edit** screen appears.

There are four possible Status settings for a trainee. Click the circle next to **Inactive** or **Incorrect** to change the status. You must click **Save** to make your change permanent.

Choosing **Incorrect** will remove the person from the list of trainees associated with this PI/Supervisor.

You may also Reassign a trainee to another PI/Supervisor by clicking the **Reassign** button at the end of the row. If you only have access to a single PI, then the reassign button is not displayed.

To Complete Training Reconciliation with No Changes

Click **Training Reconciliation** under EHS Training Functions on the EHS Training Tools tab of the MIT Learning Center page. The **PI/Supervisor Affiliation** screen will appear.

Click the to open a DLC and see PI names. You may only see one DLC or one PI Name.

Click the next to a PI or Supervisor name to see a list of Training Reconcilers and/or.

Once the list has been reviewed, click the **Reconciliation Complete** button. This button can also be found in the Edit Trainee Screen

Note: EHS Coordinators and Lead Contacts will see Reconcilers and Trainees. Reconcilers will only see and be able to edit Trainees for whom they are responsible.

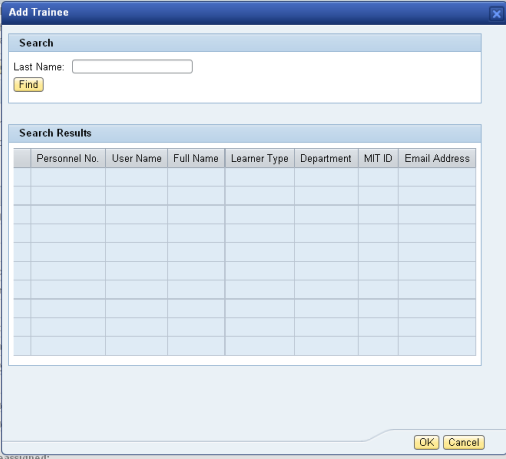
To Add a New Trainee

Click **Training Reconciliation** under EHS Training Functions on the EHS Training Tools tab of the MIT Learning Center page. The **PI/Supervisor Affiliation** screen will appear.

Click the to open a DLC and see PI names. You may see only one DLC or one PI Name. PIs are always grouped under a DLC. You can have a DLC without a PI, but you cannot have a PI without a DLC.

Click the next to a PI name to see a list of Trainees currently listed for that PI.

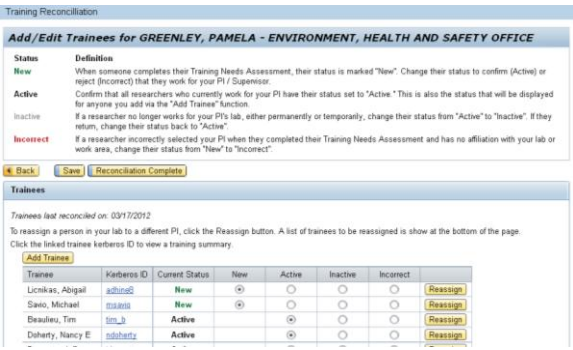
Click the **Edit Trainee** button and then the **Add Trainee** button. The **Add Trainee** search dialog box appears.



Enter the last name of the Trainee you wish to add and click on the **Find** button.

Select the desired name from the **Search Results** by clicking on the check box and clicking the **OK** button.

You may repeat this process to add more trainees.



Each time you add a trainee the **Trainees: Add / Delete** screen appears.

From this screen you may change a trainee's status, delete the trainee or reassign the trainee to another PI or Supervisor if you have authorization to update the list for multiple supervisors.

See the section *To Review or Edit a New Trainee* above.

When you are finished, click the **Back** button.

To Add a New Reconciler

PI/Supervisor Affiliation

- To view PIs for a DLC, click the arrow next to the DLC name.
- To view affiliations and reconcilers for a PI, click the arrow next to the PI name.

PI Affiliations by DLC

▶ CENTER FOR MATERIALS SCIENCE & ENGINEERING

▼ DEPT MATERIAL SCIENCE AND ENGINEERING

PIs for Dept Material Science and Engineering

▼ ALLEN, SAMUEL MILLER

Trainees last reconciled on: 10/03/2011

Edit Trainees
Reconciliation Complete

Reconciler
 Allen, Samuel Miller
 Tarkanian, Michael J
 White, Jane F

Trainee	Kerberos ID	Status
Tester, Qa023	qa023	New
Wen, Hao	hw@n	New
Hewitt, Kenneth L	khewitt	Active
Meyer, Ince	imeyer	Active

On the MIT Learning Center click on the EHS Training Tools tab select **EHS Training Functions** and then **Training Reconciliation**. The **PI/Supervisor Affiliation** screen will appear. There you will see any DLCs for which you are a Training Reconciler.

Click the ▶ to open a DLC and see PI names.

Click the ▶ next to a PI name to see a list of Training Reconcilers and Trainees for that PI.

Click the **Edit Training Reconcilers** button.

Add Reconciler

Search

Last Name:

Search Results

Personnel No.	User Name	Full Name	Leaver Type	Department	MIT ID	Email Address
<input type="checkbox"/>	00018032	jpandeva	JOHN VANDE VATE	Ex-Employee	Sloan School of Management	800744018
<input type="checkbox"/>	00029757	jan	Jessica Van	Employee	Environment, Health & Safety Office	935191496
<input type="checkbox"/>	00036471	rene	Ramon Van	Employee	Prog in Science, Technology, & Society	939629603
<input type="checkbox"/>	00056259	borovan	Boris R Van	Ex-Student	Harvard Cross-Enrollment Prog	954813140
<input type="checkbox"/>	00070084	jenryan	Jenny H Van	Student	Biological Engineering	924366364
<input type="checkbox"/>	00079079	enewalb	Eric In Van Albert	Student	Electrical Eng & Computer Sci	914269592
<input type="checkbox"/>	00018841	ivan	Loren B Van Albat	Ex-Employee	Sloan School of Management	800366726
<input type="checkbox"/>	00022901	marshall	Marshall W Van Alstyne	Employee	Sloan School of Management	967076401
<input type="checkbox"/>	00051722	beakum	Erik Marus Van Beakum	Ex-Student	Architecture	922589711
<input type="checkbox"/>	00041127	vanb	Sarah M Van Bologhen	Student	Freshman	928674127

Enter last name of the Reconciler you wish to add and click on the **Find** button.

Select the desired name from the **Search Results** by clicking the check box () next to the Personnel No.

You may repeat this process to add more reconcilers.

Training Reconciliation

Edit Reconcilers for GREENLEY, PAMELA - ENVIRONMENT, HEALTH AND SAFETY OFFICE

Reconcilers

Add Reconciler

Reconciler	
Edwards, Robert W	<input type="button" value="Remove"/>
Kawlak, Melissa J	<input type="button" value="Remove"/>

The Edit Reconcilers screen appears with a list of all reconcilers including the new one.

You may click the next to the name of any reconciler you wish to remove. Doing this will remove reconciler access for this person.

You must click the **Save** button to save any additions or deletions.

Click the **Back** button to go back to the **PI/Supervisor Affiliation** screen. You will see the changes you have made.