MPTC ACADIS PORTAL

Personnel/Employment Record Update Reference
January 2018

TABLE OF CONTENTS

This guide accompanies the initial launch of the MPTC/Acadis Portal. Recommended steps and screenshots were developed using Version 4.10.5.3 of the Acadis® Readiness Suite. Future release versions of the Acadis application may include updates to related features. Such updates, as well as any changes in MPTC business processes, may result in actual steps diverging from steps described in this guide.

SECTION 1: LOG INTO THE MPTC/ACADIS PORTAL

A link with login information to the MPTC/Acadis Portal will be sent via an email entitled "MPTC Database Welcome and Information" from "MPTC (no-reply-MPTC@acadisonline.com)."

1.	If...	Then go to...
	Logging in for the first time	Step 2
	Logging in after initial password setup	Step 6

2.	If logging into the Portal for the first time, click the Portal Login page link provided in the "MPTC Database Welcome and Information" email. The email lists your Portal username (your primary email address).

MPTC Database Welcome and Information

From: MPTC [no-reply-MPTC@acadisonline.com]
Sent: 01/02/2018 10:39 AM
To: John Doe [john.doe@emaildomain.com]

Welcome to the MPTC/Acadis Training Records Portal!

Follow the link below to finish setting up your account.

https://mptc-portal.acadisonline.com/AcadisViewer/ChangePassword.aspx?g=b3b0bfcf-4409-4d32-bde7-258a28e1f7b3&t=ASI234634sfN

Your username to access the portal is john.doe@emaildomain.com

Once signed in, the MPTC/Acadis Portal will allow you to:

- See your employment and training history
- Manage your account profile information
- Other record management abilities, depending upon permissions you've been granted

If you experience issues with sign in or access, please contact the Acadis System Administrator at mptcacadis@massmail.state.ma.us.

3.	To create an acceptable password, review the Password Rules information. Then, enter the password in the **New Password** field, reentering the same password in the **Confirm New Password** field. When finished, click **Create New Password & Sign In**. Remember the password for future login to the MPTC/Acadis Portal, or save the password in a secure location.

Create New Password

Username mm@1f.test.envisagenow.com

* New Password

* Confirm New Password

Password Rules
Your new password must conform to certain rules to be accepted.
Please review the rules below before entering your new password:

- can contain the following special characters:] ~ [} ! { @ # $ % ^ & * ( ) _ -
- none of the last 2 passwords may be re-used
- length must be no less than 10 characters
- length must be no more than 20 characters
- must have at least 1 number
- must have at least 1 uppercase character
- must have at least 1 lowercase character
- must have at least 1 special character
- may not contain your user name

Confirm your new password
To ensure that you have typed your new password correctly, you are required to re-enter the new password to confirm.

Cancel   Create New Password & Sign In

| 4. | When logging into the Portal for the first time, the User Acceptance Policy page is displayed. Terms can be viewed and printed by clicking the **Print Terms** link. To accept the policy and continue, click the **I Agree** button. |

Display Settings

By default, this website uses helpful visual and interactive elements that may not comply with federal accessibility standards for people with disabilities (Section 508 of the Rehabilitation Act). You may choose to enable these standards without losing access to essential functionality.

Accessibility ⦿ Show all visual and interactive features
                ◯ Enable accessibility standards

User Acceptance Policy

Please read the following user acceptance policy carefully as it sets out the rules and guidelines under which this software is made available to you. By accessing the software you agree to be bound by these conditions. If you do not wish to proceed click on the **"I Do Not Agree"** link now.

> By logging in and accessing this Software Program you acknowledge that you understand that this Software Program is copyrighted material and is a licensed commercial off the shelf (COTS) software program owned and maintained by Envisage Technologies Corporation.

Print Terms | I Do Not Agree   **I Agree**

| 5. | The Portal Home page displays. To log out, click on the account user name at the top right and select **Log out**. The password can be changed by clicking **Change Password**, if desired. In addition, **Display Settings** can be modified for accessibility |

Testing/Sandbox site | Massachusetts Municipal Police Training Committee   🔔   Marbry, Maxine ▾

Home   Training & Events   Registration   Organization   Personnel   Academy Resources

Change Password
Display Settings
Log out

Marbry, Maxine

My Profile

Email my Professional History Report   Manage Profile ⋮

User ID	4364-5618
Mailing Address	None specified
Primary Phone	None specified
Primary Email	mm@1f.test.envisagenow.com

purposes.

6.	To login after initial Portal password setup and UAP acceptance, navigate to the MPTC/Acadis Portal login page at (https://mptc-portal.acadisonline.com). If a notification appears regarding pop-ups being currently blocked, follow the browser's methods for allowing pop-ups for the MPTC/Acadis Portal. This will enable desirable feature functionality.
	Note: Up-to-date versions of Google Chrome or Microsoft Internet Explorer are recommended browsers for the MPTC Portal and the Acadis administrative site (the administrative site is accessible to MPTC Administrators). The MPTC Portal is also compatible with other commercially available browsers, including but not limited to Edge, Apple Safari and Mozilla Firefox.
7.	Enter your Portal username (your primary e-mail address as shown in your original Portal Welcome email) in the **E-mail address (Username)** field and the previously created password in the **Password** field. Click **Sign in** to log in to the MPTC/Acadis Portal.

SECTION 2: SEE A LIST OF PERSONNEL

As Chief, you have been granted Workforce Portal permissions allowing you to view a list of your Department's active personnel by Name, User ID (a number assigned by MPTC for identification in the MPTC/Acadis Portal), Title/Rank and other employment information. From this list, you will be able to view detailed personnel records for each employee listed.

1.	To view a list of personnel, click **Personnel** from the top-menu, and then select "See a List of Personnel" from the menu list.
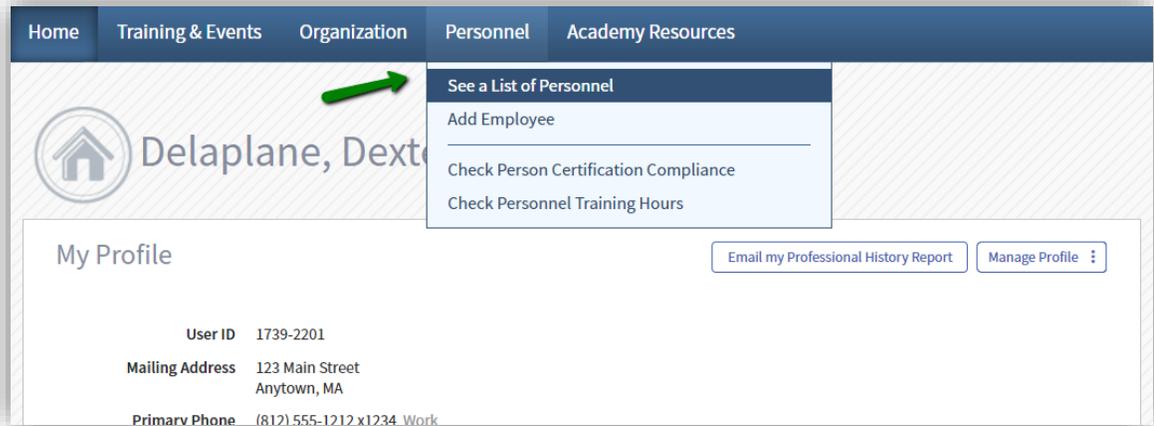
2.	The New Personnel Portal Welcome window highlights personnel features available with additional permissions. To hide the window in the future, click the **Don't show me this again** checkbox before clicking **Close**.
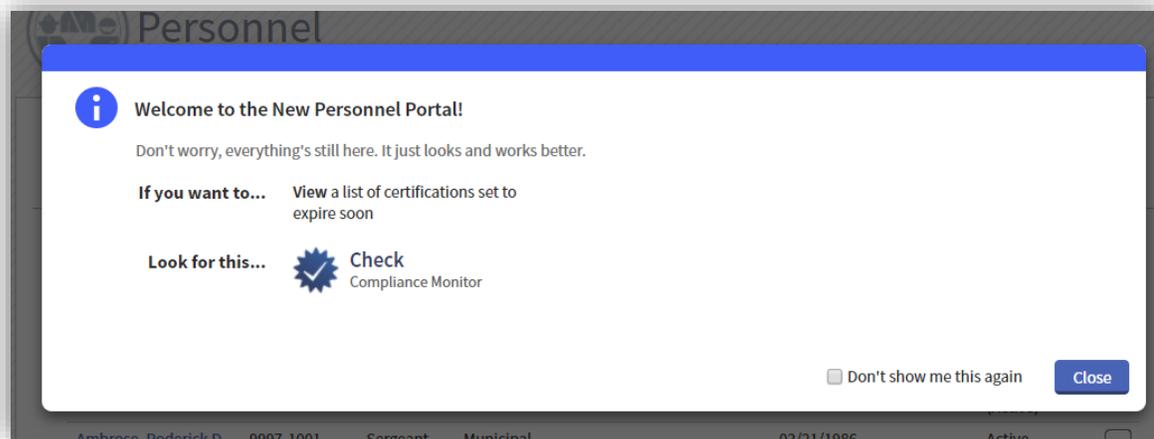
3. Active personnel are now displayed in a sortable list. The list only shows Employees who have been reported to the MPTC as active employees. If employees need to be added, see Section 4 below.

To view a Personnel Record, click the desired personnel Name link.

Note: with additional Permissions, icons are available above the Personnel list for quick access to Compliance features. In the future, additional instructions will be shared regarding Instructor Certification management processes.

4. The Personnel Record is now displayed for the selected employee. If available in the MPTC/Acadis Training Database, contact information for the employee is listed in the Personnel Profile section. This contact information can be updated by the employee, once he or she is granted MPTC/Acadis Portal permissions.

5. Scroll to the Employment section, where the current employment information is displayed. When available, previous employment records can be viewed by clicking the **Show History** button, or the **here** link.

Employment

Show History

Previous employment records exist. Click here or "Show History" to view all records.

Organization	Employment Type / Appointment Type	Supervisor	Last Hired
Abington Police Department ⭐ Patrol Officer Active	Municipal Police Officer - Fulltime / Full Time		11/11/1111

SECTION 3: REQUEST AN UPDATE TO EXISTING PERSONNEL

As Chief, you have been granted "Personnel Updates" Workforce Portal permissions allowing you to update employment records, including separating employees via the personnel list in the Portal.

1.	To update or remove a particular employee from the Personnel page, select Update Employment from the ellipsis menu for the appropriate person.
2.	<table><tr><td>*To submit a request to...*</td><td>*Go to:*</td></tr><tr><td>Correct an incorrect Hire Date for an accurate position...</td><td>Step 3</td></tr><tr><td>Correct an incorrect Title/Rank, Appointment Type or Employment Type...</td><td>Steps 4 - 10</td></tr><tr><td>Indicate a Transfer within the Department (for example, the employee held the listed position formerly, but now holds a different position in the department)...</td><td>Step 11</td></tr><tr><td>Separate the employee from the Department...</td><td>Step 12</td></tr></table> **Note:** If you need to add a new employee to the Department (their name is not listed in your List of Personnel), MPTC has provided a spreadsheet for this process during the Portal data validation phase. Please see Section 4 below for instructions.

3. If Hire Date is incorrect, select <u>**Hire Date Correction**</u> from the <u>**Update Action**</u> dropdown. Second, <mark>You <u>**MUST**</u> enter the correct Hire Date in the <u>**Comments**</u> section</mark>, and put <mark>**today's date**</mark> as the <mark><u>**Effective Date**</u></mark>. Finally, click <u>**Save**</u> and MPTC will use this information to update the Hire Date in the MPTC/Acadis Training Database.

4. If the listed Title Rank, Employment Type or Appointment type are incorrect or missing, select the Employment Action **Correction of Existing Record** via the <u>**Update Action**</u> type-ahead field.

5.	The Effective Date of this update can be edited clicking the Calendar icon in the **Effective Date** field and choosing the appropriate date, or by typing the date in the field. The Effective Date will default to today's date.

6.	**Employment Status** should remain Active (Active) for corrections or updates to the current Active employment.

7.	Use the **Title/Rank** dropdown field to select the appropriate Title/Rank, either by using the type-ahead function or scrolling to find and select the correct value. If you do not see an appropriate Title/Rank, please send the MPTC/Acadis system administrator a message to mptcacadis@massmail.state.ma.us.

8.	If appropriate, the **Employment Type** and **Appointment Type** can also be updated via the field dropdown lists.

9.	MPTC does not require tracking of Supervisor in the MPTC/Acadis database. This field may be ignored.

10.	If desired, Comments can be added to this employment update. Note that Comments will remain permanent on the Employment Record and cannot be deleted.

Click **Save,** when updates are complete.

Continue to Step 16.

11.	To indicate that the employee has transferred within the department to a new position (but formerly held the listed position), select **Transfer within Department** from the **Update Action** dropdown. Filter dropdown results by using the type-ahead feature.

Then, follow Steps 5 – 10 above (this section) to update the Effective Date, Employment Status, Title/Rank, Employment Type and Appointment Type, and click **Save**.

12.	If an employee has separated from the Department, select the appropriate Employment Action (Voluntary Separation, Retirement, Medical Separation / Retirement / Leave, Termination, or Resignation in Lieu of Termination), from the **Update Action** dropdown.
13.	Indicate the date of the Separation by typing in or choosing the appropriate date from the Date Picker by clicking on the calendar icon.
14.	If an employee has left/separated from the department, regardless of the reason, the Employment Status **MUST** be updated to an (Inactive) status, such as Retired (Inactive) or Separated (Inactive). Select the appropriate **(Inactive)** status from the **Employment Status** dropdown. Although separated from your department, the employee will still have an active person record in Acadis, and may be added to another department by that department's personnel.

15. Title/Rank, Employment Type and Appointment Type may be changed for employees who have left/separated from the department. This signifies the position from which the employee is being separated. Add **Comments** if appropriate. Note that the Comments will be permanently added to the historical Employment Record and cannot be deleted.

Click **Save** to complete the request.

Field	Value
* Update Action	Voluntary Separation
* Effective Date	07/4/2017
Employment Status	Separated (Inactive)
Title/Rank	Detective Lieutenant
Employment Type	Municipal Police Officer - Fulltime
Appointment Type	Full Time
Supervisor	Select a supervisor...
Comments	Provide any additional information relevant to this employment

Cancel   **Save**

16. Once changes are saved, the Personnel list will now reflect the changes for the employee, except for Hire Date Corrections which will take effect after further MPTC processing. Note: by default, the Personnel list only displays Active employees for your department. To view an employee who was separated, click the **Show all employees** link at the top of the Personnel list. Employees with an Inactive Employment Status for your department are now also displayed in the list.

Personnel (41)   Search for Person   **Add Employee**

Currently showing all active employees. Show all employees

Name ▲	User ID	Title/Rank	Employment Type	Appointment Type	Last Hired	Supervisor	Employment Status

Name ▲	User ID	Title/Rank	Employment Type	Appointment Type	Last Hired	Supervisor	Employment Status
Aarvesen, Aaron	3190-2970	Detective Lieutenant	Municipal Police Officer - Fulltime	Full Time	07/04/2010		Inactive

Return to Step 2 (this section) to make other corrections on other personnel records if desired.

SECTION 4: REQUEST TO ADD NEW ACTIVE EMPLOYEES (DURING CURRENT PORTAL LAUNCH PHASE ONLY)

MPTC anticipates that due to the timing of personnel data migration, your Department may have several employees that need to be added to your List of Personnel. In the future, you will be able to submit a WebForm from the Portal which will automatically create a new Person Record in the MPTC/Acadis database. However, for the current data validation phase of the MPTC/Acadis Portal launch, please use the spreadsheet template provided by MPTC and follow the steps below to submit this information to MPTC for upload to your Department. (Note: it is possible that the process for larger departments may always be to use a specific spreadsheet template to request new employee records.)

1.	To request the addition of a currently Active employee to your List of Personnel, open the spreadsheet entitled "Active Employees to Add to MPTC/Acadis Database.xlsx" received via email from Executive Director Dan Zivkovich. If the file indicates you are viewing Protected View, click **Enable Editing**, which will allow you to enter the personnel information into the spreadsheet template.
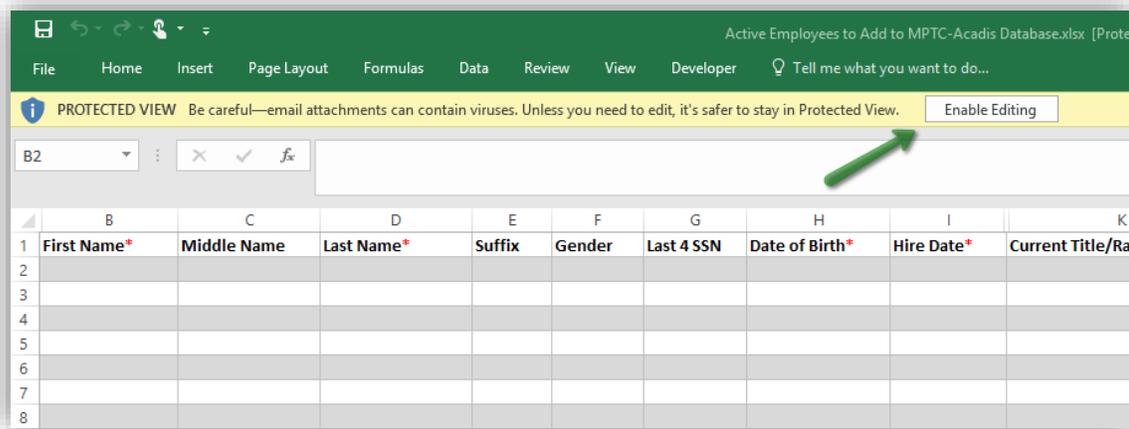
2.	Upon clicking in each cell, additional information about the data required or requested in that cell will be displayed for your reference.
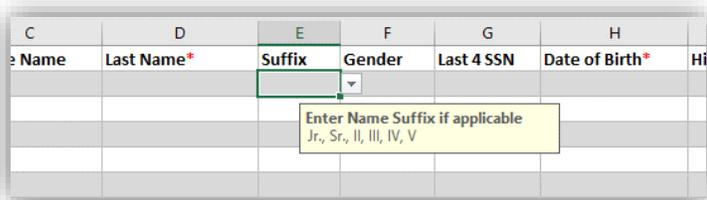
3.	Some cells will ensure that properly formatted data or data that matches a list item in a dropdown is provided. If a validation message appears, simply click **Retry** or **Cancel** and re-enter corrected data in the cell.
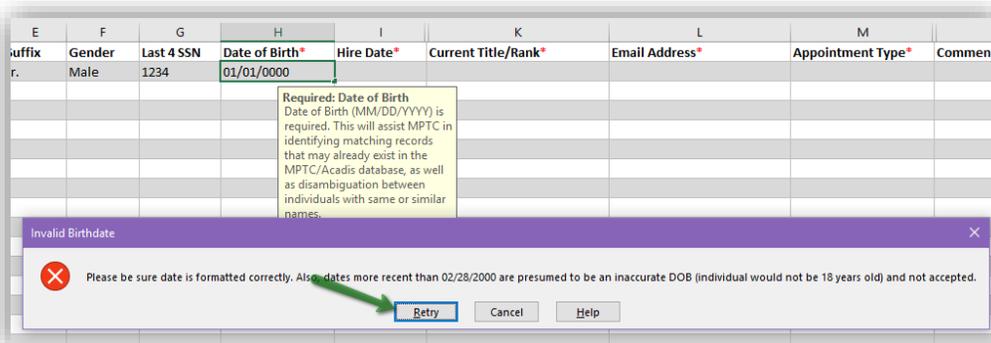
4.	For each new employee to be added, enter fully complete data along one row, according to the Column Headers. A red asterisk (*) indicates that this data field is required by MPTC/Acadis in order to create the personnel record.
	
	    ▪ **First Name*** - this field is required.
	    ▪ **Middle Name** – please enter the employee's entire middle name. If no middle name, leave blank.
	    ▪ **Last Name*** – this field is required.
	    ▪ **Suffix** – make an appropriate selection from the spreadsheet's dropdown. If no suffix, leave blank.
	    ▪ **Gender** – accepted values: M, F, Male, Female. The dropdown may be used. This field is not required and may be left blank.
	    ▪ **Last 4 SSN** – please only include the last 4 digits of the employee's Social Security Number. MPTC has chosen not to store full SSN in the MPTC/Acadis Training Database.
	    ▪ **Date of Birth*** – this field is required. The spreadsheet will not accept dates more recent than 02/28/2000, as it is expected that employees will be at least 18 years of age.
	    ▪ **Hire Date*** – this field is required. This is the hire date of this employee at your organization, at the Title/Rank you are specifying in the next column.
	    ▪ **Current Title/Rank*** – this field is required. Make an appropriate selection from the dropdown. If the appropriate Title/Rank does not exist, choose "Other" at the end of the dropdown, then use the Comments column at the far right to provide MPTC with the appropriate Title/Rank.
	    ▪ **Email Address*** – this field is required. This will become the employee's Primary Email Address, which will also be used as their Portal login username. Portal accounts will be created for Departmental employees in the future, as MPTC launches other features of the MPTC/Acadis Training Database.
	    ▪ **Appointment Type*** – this field is required. Choose from three available options in the dropdown: Full Time, Intermittent/Reserve/Part Time, or Volunteer/Unpaid.
	    ▪ **Comments** – if appropriate, use this field to provide MPTC any additional information as may be necessary regarding the addition of this employee to your Department. For example, if you chose "Other" as the Current Title/Rank, be sure to indicate here the actual Title/Rank.
	
	Repeat Step 4 for until all new employees have been added to the spreadsheet.

5.	When complete, save the file, updating the filename to indicate your Department. For example, for the Abington Police Department, the Filename would be "ABINGTON_Active Employees to Add to MPTC/Acadis Database.xlsx". Click **Save**.
6.	Email the saved file to Mary Bragg: mary.bragg@state.ma.us. If required, MPTC will contact you for clarification on data in the file or will contact you to let you know the upload has been completed. Once uploaded, the Personnel will be available in your List of Personnel in the Portal and you should verify that information is correct (following any update procedures as may be necessary, and as outlined in this guide).
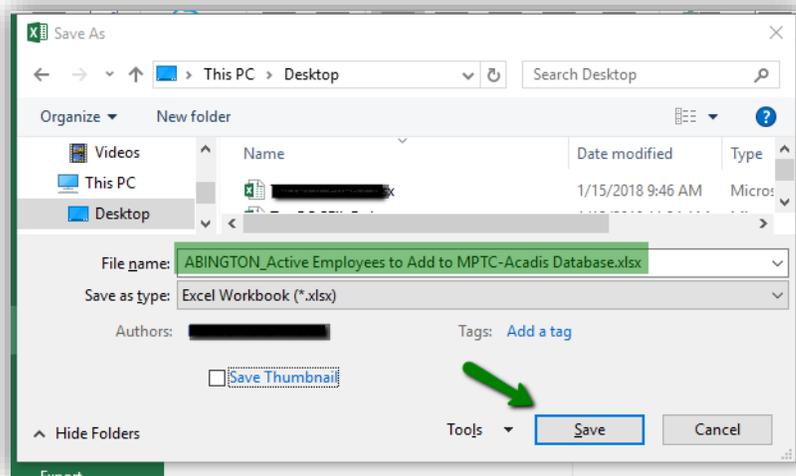
SECTION 5: UPDATE ORGANIZATION PROFILE INFORMATION AND POINTS OF CONTACT

From the Organization page, authorized Portal users can maintain organization address, phone, and email information. Changes made to the Portal organization's contact information will be reflected from the Organization Record in the MPTC/Acadis Training Database.

7.	*If...*	*Then go to...*
	Updating address(es), phone number(s) or email address(es) for the department	Step 2
	Adding or editing department Points of Contact	Step 4

8.	From the **Organization** Tab, select **View or Update Organization Profile**.
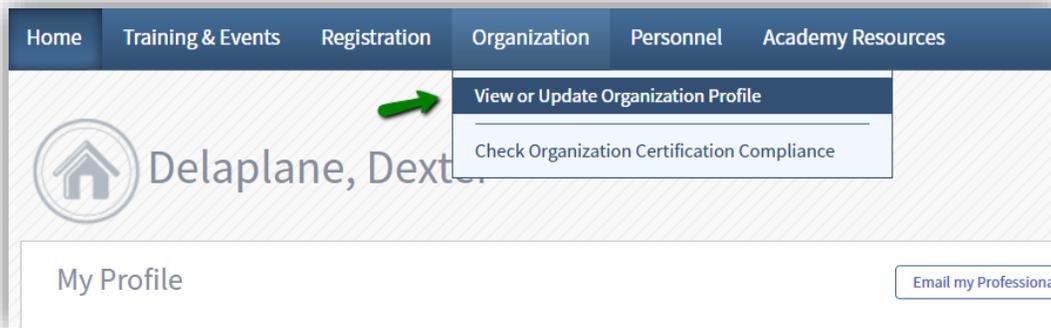
9.	Click the **Manage Profile** button on the Organization Page and select the information to update. Existing information can be edited, or additional contact information added.
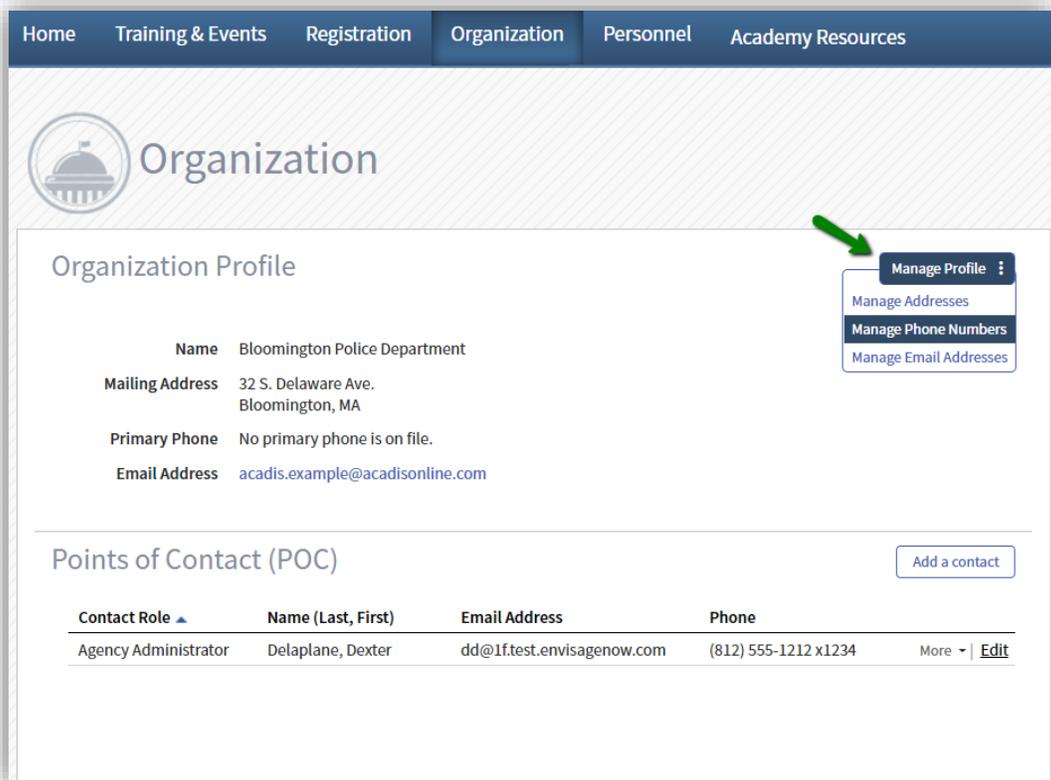
10.	From the POC section on the Organization page, Portal users can view the current Points of Contact (POC) and their assigned Contact Roles. When the Portal user has permission to view data from the POC's employing organization, the POC email and phone will also be listed.

In addition, Portal users assigned the "Points of Contact" Portal permission can manage POC data from the Portal Organization page. Authorized Portal users can add a new POC by clicking the **Add a contact** button. However, only POCs granted POC permission/editing authorization by MPTC can edit the POC list. This is not a function available to all POCs automatically.
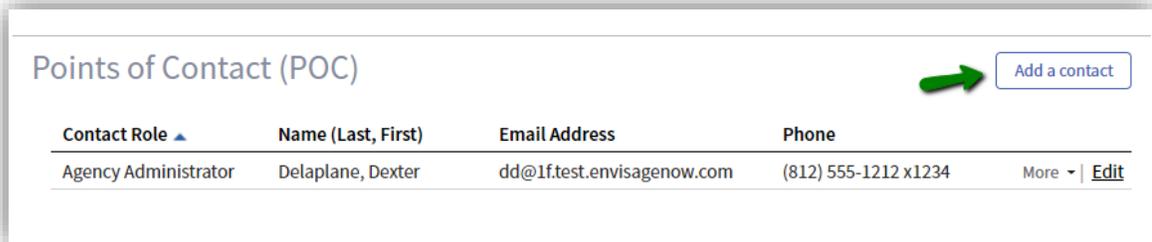
11.	From the Add a Point of Contact page, a new POC can be added by selecting the proper role from the **Contact Role** drop-down.
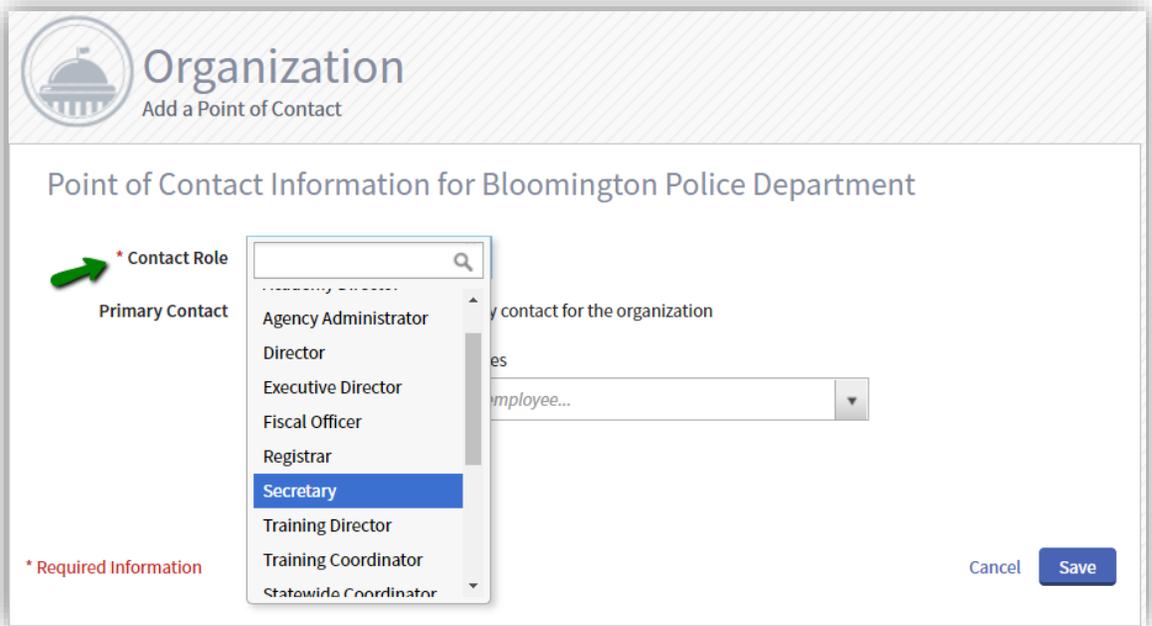
12.	To designate the POC as the new "primary," select the **Primary Contact** checkbox. Portal users will be alerted when a primary POC already exists. Only one POC can be denoted as Primary.
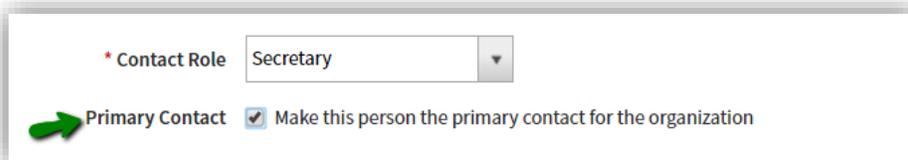
13.	When the new POC is an employee, use the **Select from a list of employees** radio button. Then, choose the name from the Employee drop-down list.

If you would like to designate an employee as a POC who is not currently listed in the Employees dropdown, be sure to Request to Add the new employee as outlined in Section 4 above. Once the employee record has been added by MPTC to your Organization, you will be able to select them from the dropdown menu at that point.

In the future, if you have a POC who is not employed by your organization but already has an existing record in the MPTC/Acadis database and also has a Portal account, the POC will be able to share with you their User ID. Once User ID is known, non-employees with existing records in the MPTC/Acadis can be added as POC to your Department by clicking the **Select by User ID** radio button.

14.	After selection of the POC, click **Save**.

15.	The added POC is now displayed in the POC area of the Organization Page. A gold star denotes a Primary contact.