



Job Aid Competence Management System (CMS) Guide for Participants

Date: June 2022
Version 3.0



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Competence Management System (CMS) Account

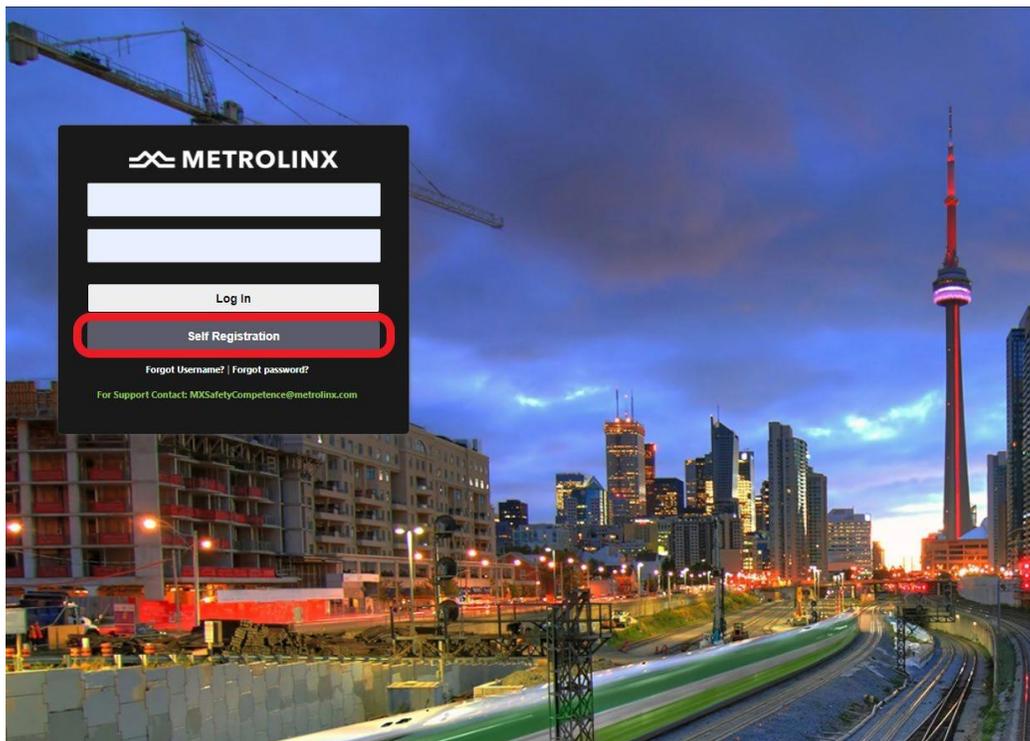
This guide will show participants the steps for using the Competence Management System (CMS). Participants are reminded to keep account information private. It should not be shared with anyone. The Competence Management System (CMS) will store all the participants training information (e.g. Personal Track Safety (PTS) Training), certifications, and audit information.

Creating an account

To create a Competence Management System (CMS) account, participants will require a unique email address. Participants will not be able to create an account using a universal shared email address (e.g. shared company email address).

From the Metrolinx Safety Competence login page, participants will click on the *Self Registration* icon.

<https://mxsafetycompetence.csod.com/login/render.aspx?id=defaultclp>



Participants will enter the required information in the following fields to complete the account profile set up:

- First Name
- Last Name
- Email Address

Further information is required from the participants.

Participants will click on the *options icon*  beside the **Division** box.

Welcome! Register to Create your Login Account

* Required Field

* First Name:

* Last Name:

* Email Address:

* Division: 

* Passwords must contain both upper and lower case letters.
 * Passwords must contain alpha and numeric characters.
 * Passwords must be 8 - 20 characters.
 * Passwords cannot have leading or trailing spaces.
 * Passwords cannot be the same as the Username, User ID, or email address.
 * Passwords must contain at least one special character.

* New password **Ab14%#26**
 Example
Ab14%#26

* Confirm password **Ab14%#26**

Already a user? [Login here](#)
 Return to Browsing? [Click here](#)

I'm not a robot 

Participants can use the **Text filter box** to further narrow the search.

Search Division

Title: ID:

(13 Results)

| Title | ID | Parent |
|--|--|-----------|
| Business Technology | Business_Technology | Metrolinx |
| Capital Projects Group | Capital_Projects_Group | Metrolinx |
| Communications | Communications | Metrolinx |
| <input checked="" type="checkbox"/> Contractors | Contractors | Metrolinx |
| Finance | Finance | Metrolinx |
| General Counsel & Corporate Secretary | GeneralCounsel_CorporateSecretary | Metrolinx |
| Human Resources & Enterprise Centres of Excellence | HumanResources_EnterpriseCentresExcellence | Metrolinx |

Participants can select the applicable division/company by looking through the populated list for the company required.

Participants can click the *expand icon*  to view the full list of **Contractors**.

Search Division

Title: ID:

(787 Results)

All > Metrolinx > Contractors >

| Title | ID | Parent |
|----------------------------|----------------|-------------|
| 2232420 Ontario Ltd | Contractor_001 | Contractors |
| 3 Bell Painters Ltd | Contractor_002 | Contractors |
| 4 Slight Utility Engineers | Contractor_711 | Contractors |
| 4 Transit | Contractor_739 | Contractors |
| 5005249 Ontario Inc. | Contractor_004 | Contractors |
| A&B Rail Services | Contractor_005 | Contractors |
| AAATECH SCIENTIFIC INC | Contractor_006 | Contractors |
| ABC Railway Works | Contractor_007 | Contractors |

Participants must follow the password requirements listed.

- * Passwords must contain both upper and lower case letters.
- * Passwords must contain alpha and numeric characters.
- * Passwords must be 8 - 20 characters.
- * Passwords cannot have leading or trailing spaces.
- * Passwords cannot be the same as the Username, User ID, or email address.
- * Passwords must contain at least one special character.



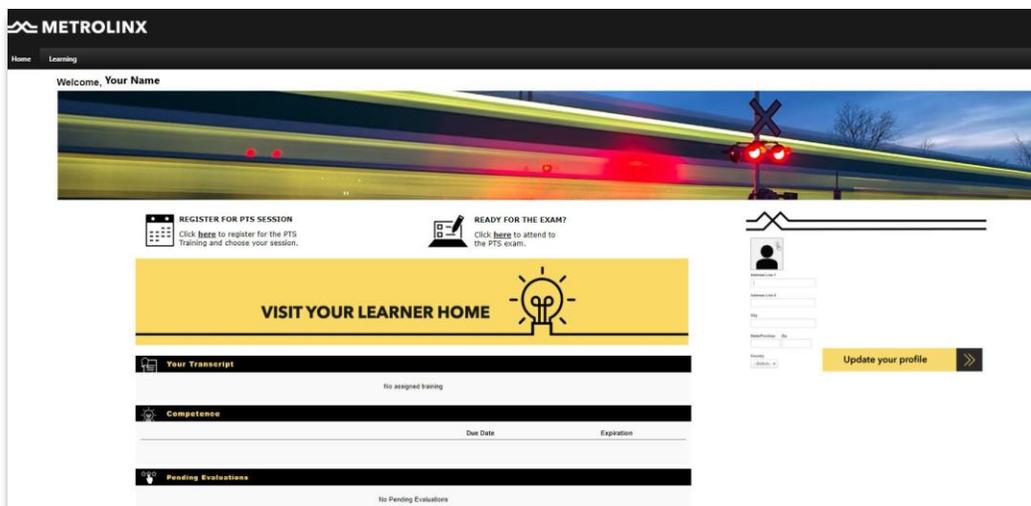
A screenshot of a password creation form. It shows two input fields: '* New password' and '* Confirm password'. Both fields contain the example password 'Ab14%#26'. The word 'Example' is written in red above the second field.

Participants will click on the *I'm not a robot* checkbox for the green check mark and then click *Log In*.



A screenshot of a reCAPTCHA verification step. It features a green checkmark and the text 'I'm not a robot'. To the right is the reCAPTCHA logo and links for 'Privacy' and 'Terms'. Below the verification area are two buttons: 'Cancel' and 'Log In', with the 'Log In' button highlighted by a red circle.

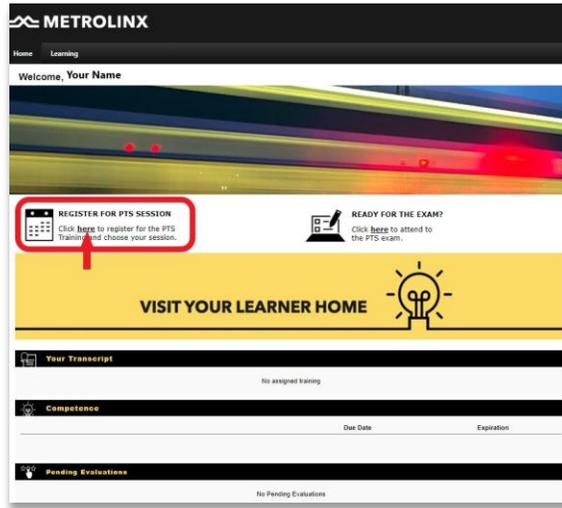
This will complete the creation and first-time login to the Competence Management System (CMS) account.



How to Register for a Session

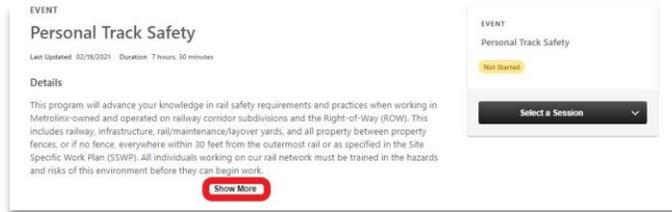
From the **Welcome** page participants have a few options to register for a Personal Track Safety (PTS) session.

Participants can hover the cursor over **REGISTER FOR PTS SESSION** from the **Welcome** page and click [here](#).

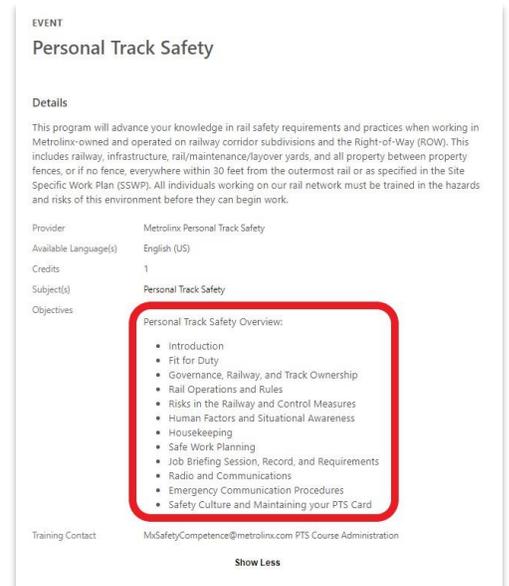


This will open the **Event** section of the program.

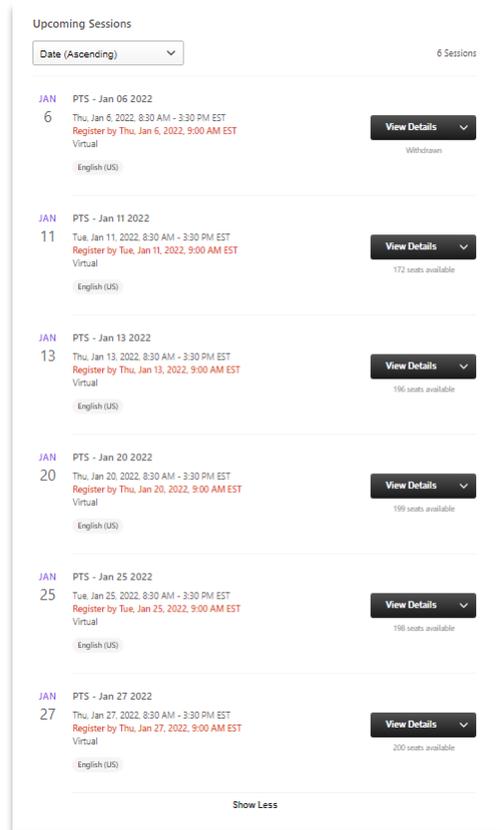
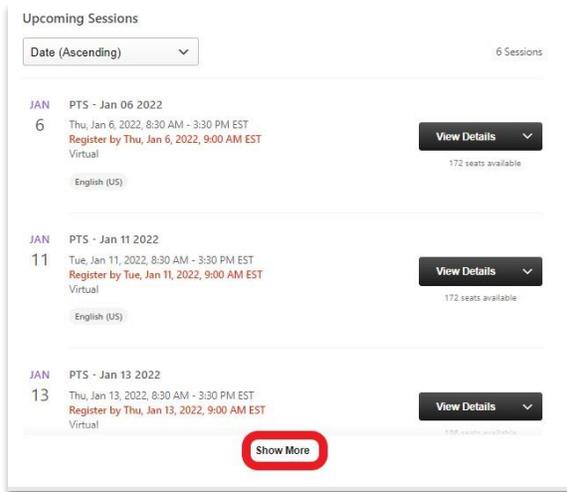
Participants can view the full Personal Track Safety (PTS) overview by clicking *Show More*.



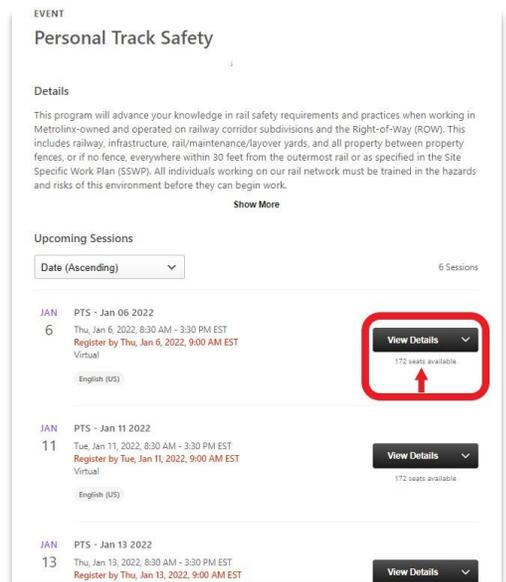
This will open the **Full Session** details.



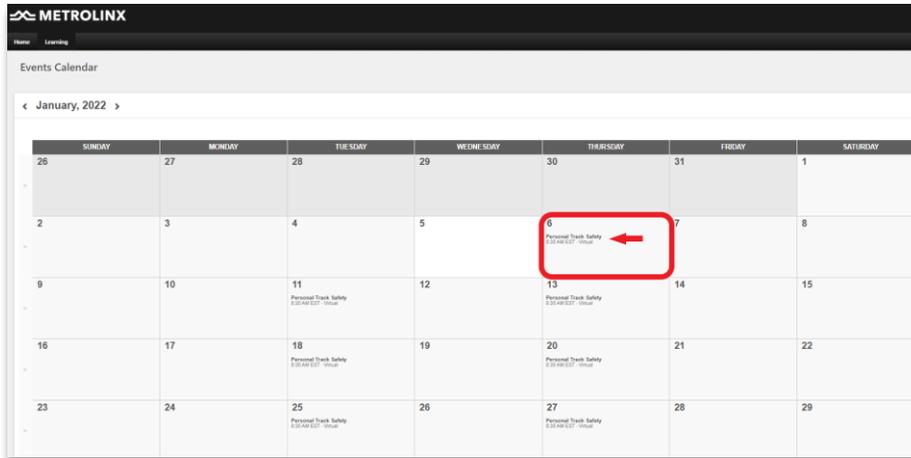
Participants can view all scheduled events on the **Upcoming Sessions** screen by clicking *Show More*.



Participants will select a session date that has seats available and click *View Details*.

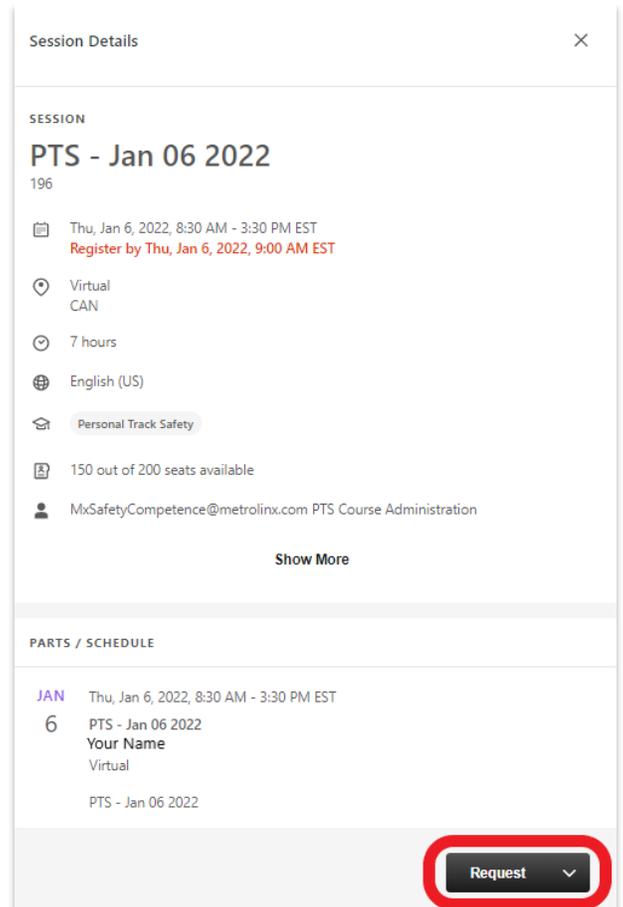


This will open a new window with the upcoming dates of Personal Track Safety (PTS) in a calendar format.



Click *Personal Track Safety* and it will open the *Session Details* window.

Participants can now click *Request*.



Participants will select a session date that has seats available and click *View Details*.

EVENT
Personal Track Safety

Details
This program will advance your knowledge in rail safety requirements and practices when working in Metrolinx-owned and operated on railway corridor subdivisions and the Right-of-Way (ROW). This includes railway, infrastructure, rail/maintenance/layover yards, and all property between property fences, or if no fence, everywhere within 30 feet from the outermost rail or as specified in the Site Specific Work Plan (SSWP). All individuals working on our rail network must be trained in the hazards and risks of this environment before they can begin work.
[Show More](#)

Upcoming Sessions
Date (Ascending) 6 Sessions

| | | |
|--------|--|---|
| JAN 6 | PTS - Jan 06 2022 Thu, Jan 6, 2022, 8:30 AM - 3:30 PM EST Register by Thu, Jan 6, 2022, 9:00 AM EST Virtual English (US) | View Details (highlighted with red box and arrow) 172 seats available |
| JAN 11 | PTS - Jan 11 2022 Tue, Jan 11, 2022, 8:30 AM - 3:30 PM EST Register by Tue, Jan 11, 2022, 9:00 AM EST Virtual English (US) | View Details 172 seats available |
| JAN 13 | PTS - Jan 13 2022 Thu, Jan 13, 2022, 8:30 AM - 3:30 PM EST Register by Thu, Jan 13, 2022, 9:00 AM EST | View Details |

This will open the **Session Details** window and participants will click *Request* for the date selected.

Session Details

SESSION
PTS - Jan 06 2022
196

Thu, Jan 6, 2022, 8:30 AM - 3:30 PM EST
Register by Thu, Jan 6, 2022, 9:00 AM EST

Virtual
CAN

7 hours
English (US)

Personal Track Safety

150 out of 200 seats available

MxSafetyCompetence@metrolinx.com PTS Course Administration

[Show More](#)

PARTS / SCHEDULE

| | |
|-------|---|
| JAN 6 | Thu, Jan 6, 2022, 8:30 AM - 3:30 PM EST PTS - Jan 06 2022 Your Name Virtual PTS - Jan 06 2022 |
|-------|---|

Request (highlighted with red box)

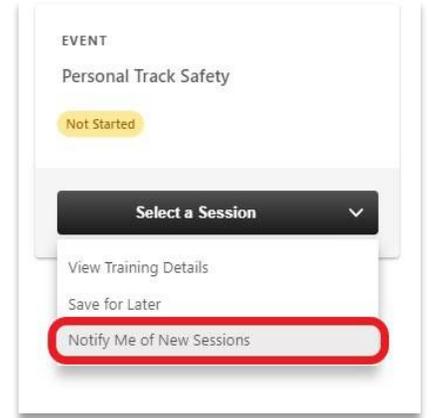
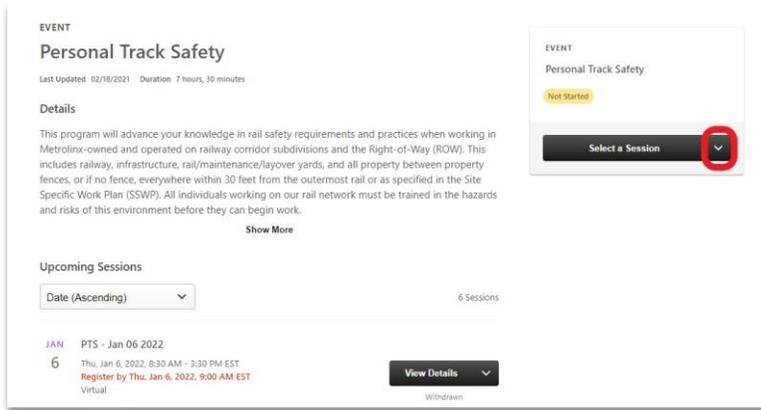
After participants click *Request* the **Session Details** information will be updated to read *View Training Details*.

PARTS / SCHEDULE

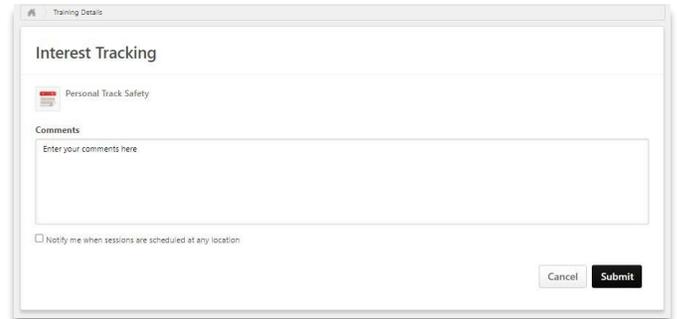
| | |
|-------|---|
| JAN 6 | Thu, Jan 6, 2022, 8:30 AM - 3:30 PM EST PTS - Jan 06 2022 Your Name Virtual PTS - Jan 06 2022 |
|-------|---|

View Training Details (highlighted with red box)

If participants cannot find a session with an open seat, click on the arrow in *Select a Session* from the **Event** section and a drop-down menu will open.



This will open a new screen titled **Interest Tracking**.



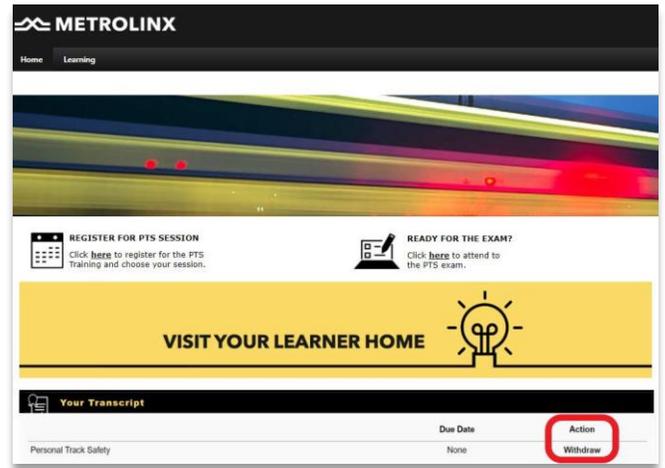
In the **Comments** box participants can add the requirements needed and click *Submit*.



Withdrawing from a Session

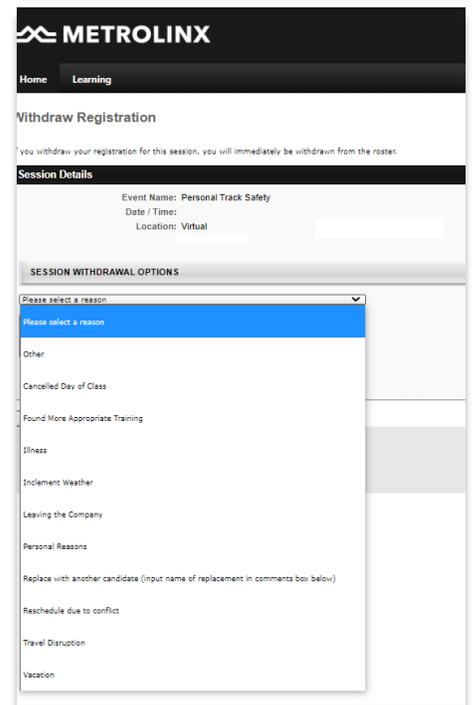
Participants can withdraw from a session by completing the following steps.

From the Welcome page participants will click *Withdraw* in the **Your Transcript** section.



This will open the **Withdraw Registration** screen.

Participants can select from a pre-populated list of *Reasons* to withdraw.



Participants can use the **Comments** section to type the reason.

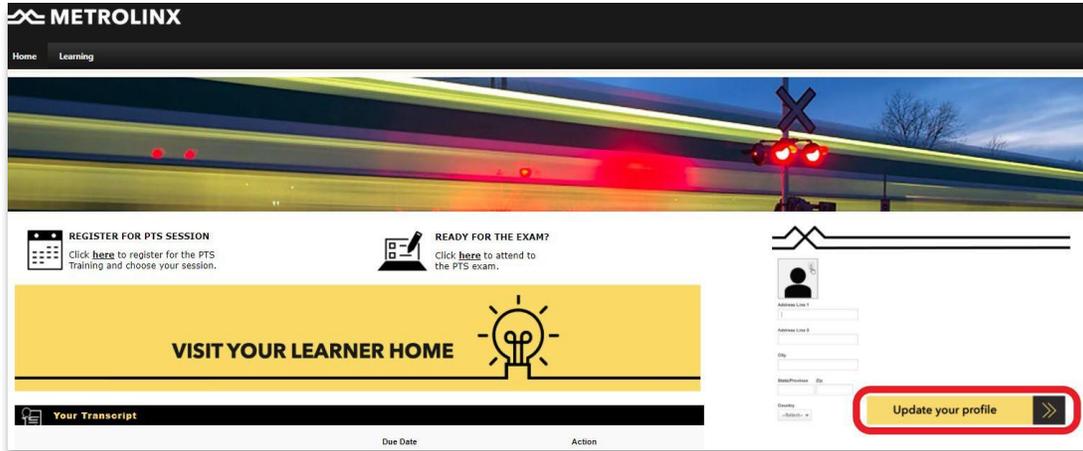
Once completed participants will click *Submit* and this will remove the participant from the session.



Update your Profile

Participants must complete the **Update your profile** section in the Competence Management System (CMS) to receive the certification and identification card.

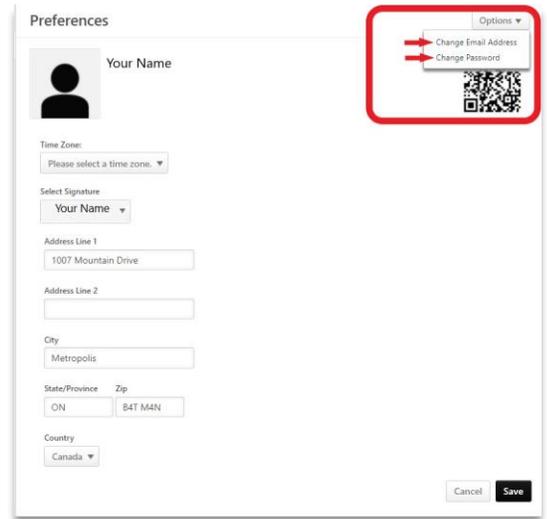
From the **Welcome** page participants will click *Update your profile*.



The **Preferences** page includes all the required information that participants must complete to receive the Personal Track Safety (PTS) certification and Identification card.

The address provided must be accurate. The identification card will be sent to the participant at the listed address.

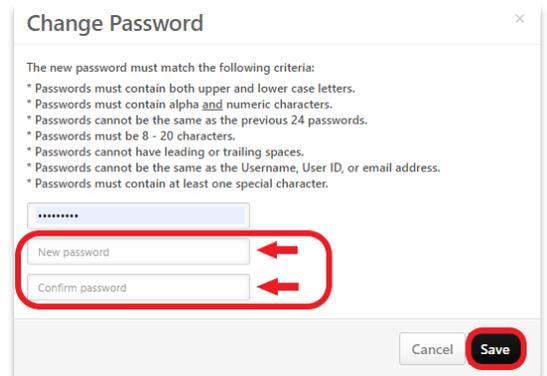
Participants will hover the cursor over the **Options** icon and click the option that requires updating.



Participants can update the **Email Address** and **Password** used for the Competence Management System (CMS) account from this location.

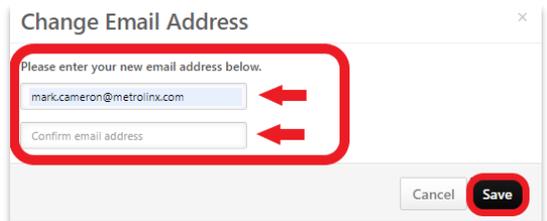
Participants can create a **New Password** following the criteria listed and **confirm** the password.

Once completed participants will click **Save**.



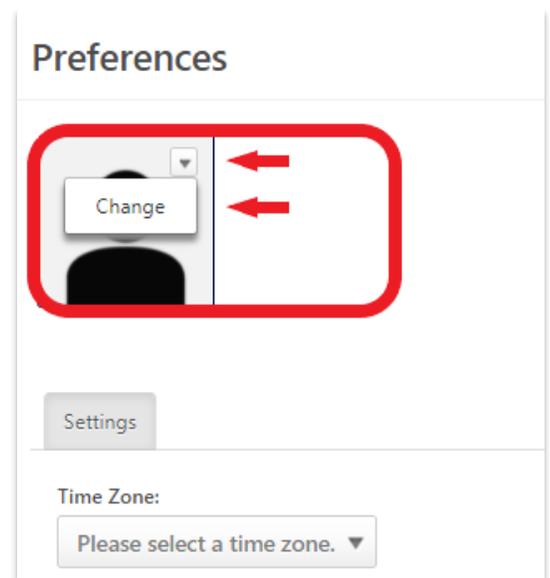
Participants can change the **Email Address** associated with the account and **confirm** the email address.

Once completed participants will click **Save**.

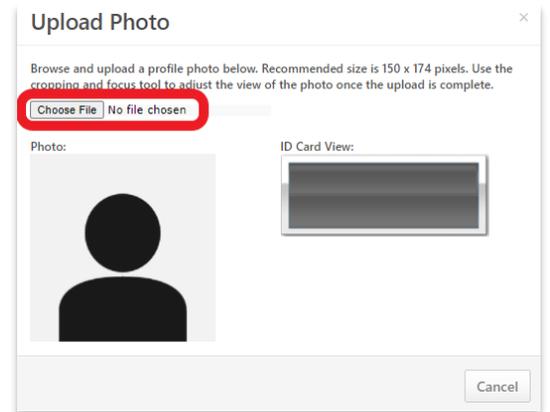


Participants must update the photo associated with the Competence Management System (CMS) account.

Participants will hover the cursor over the **Arrow** icon and click *Change*.



This will open the **Upload Photo** option for participants. Participants will click *Choose File* and upload a photo that meets all the requirements.



Note: Depending on how participants are interacting with the Competence Managements System (CMS), this will reflect how the Upload Photo option performs (e.g. Smartphone, Tablet, or Computer).

Participants must upload a photo that is current and:

Does not have a face covering



Does not have a hat



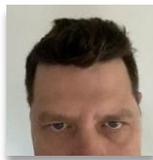
Is in colour



Is not wearing sunglasses



Is not cut off



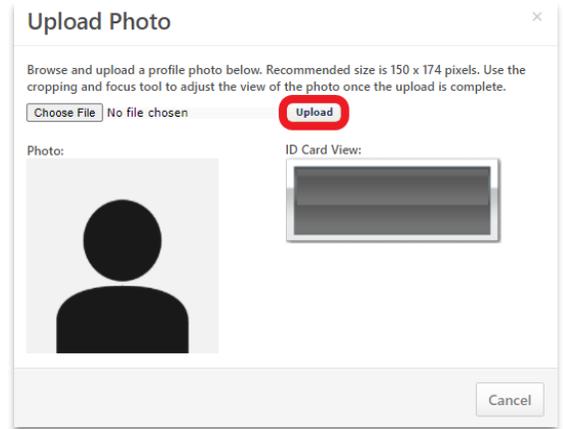
Is facing forward



Is not a copy of a photo

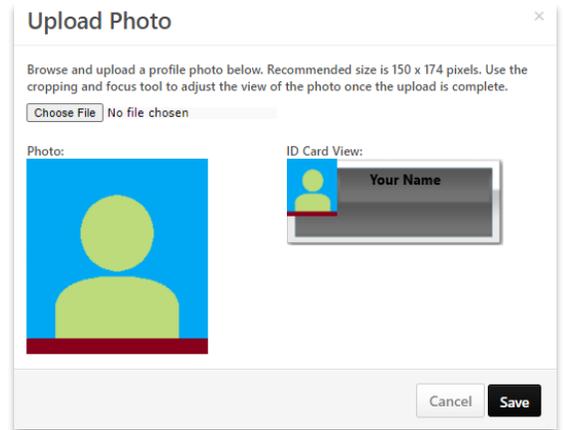


After selecting the photo to be uploaded participants will click *Upload*.

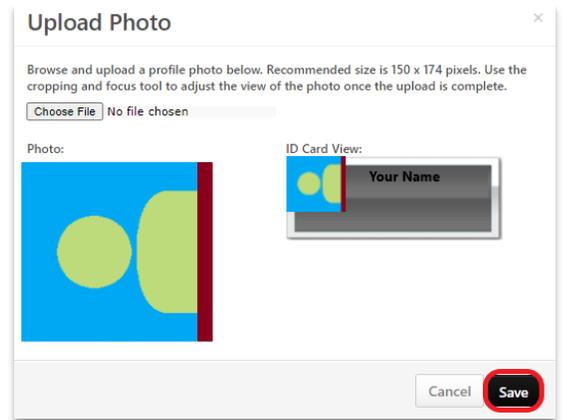


The next screen will show participants the uploaded image and how it will appear on the **ID Card View**.

If the image meets the photo requirements participants will click *Save*.



If the image is turned sideways but meets the requirements participants can click *Save*.



Once the image is uploaded participants will see the uploaded photo in the **Preferences** section and in the **Universal Profile** location at the top right of the page.



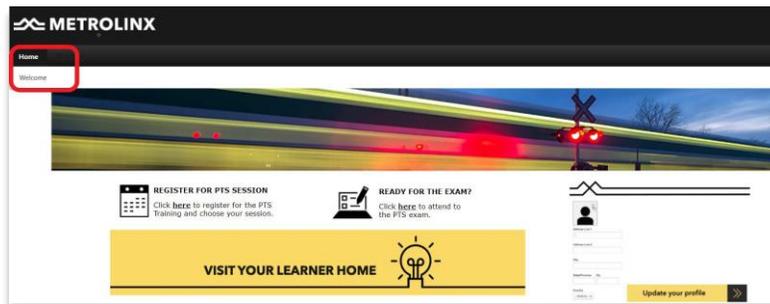
Welcome Page

When participants log into the Competence Management System (CMS) account, it opens to the **Welcome** page.

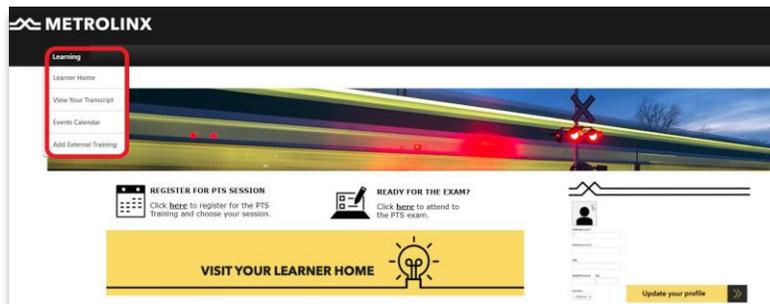
This is the page where participants can:

- View personal training information.
- View course catalogues that have been assigned.
- View transcripts for status of progress.
- View learning and audit completions.

To access the **Welcome** page at any time, hover over **Home** in the top navigation bar and click *Welcome* from the dropdown list.

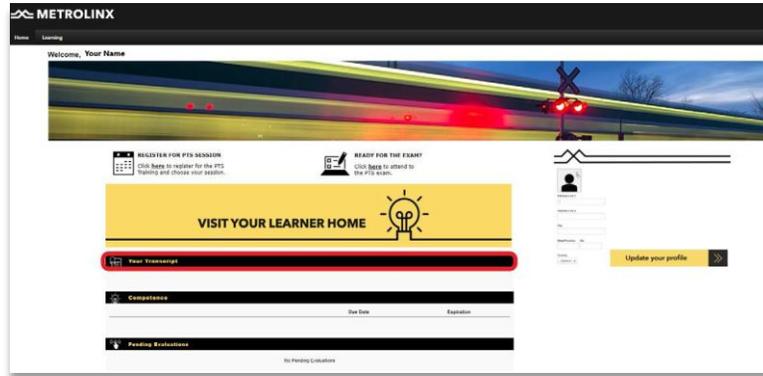


To access the following information participants will hover the cursor over **Learning** and choosing from the options in the dropdown list.



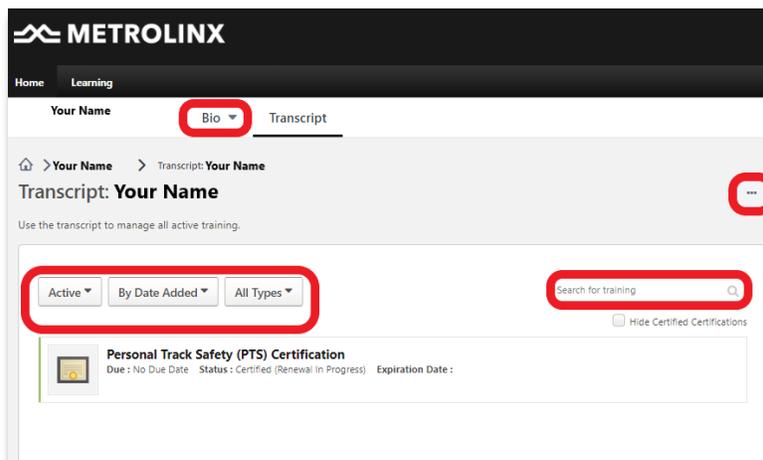
Your Transcript

This section displays the participants learning courses (selected or assigned) in a structured list. From the **Welcome** screen participants will click *Your Transcript*.

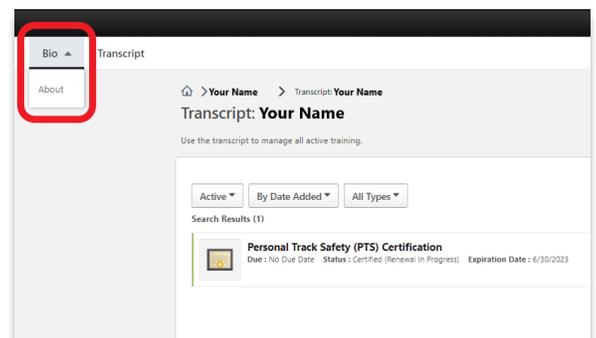


Participants have the following options from this screen:

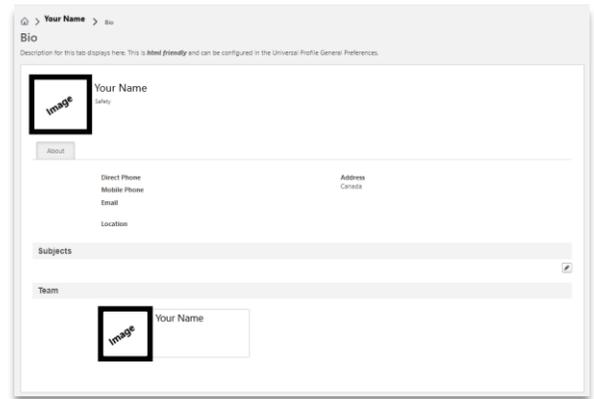
- Search for training
- Bio
- Active



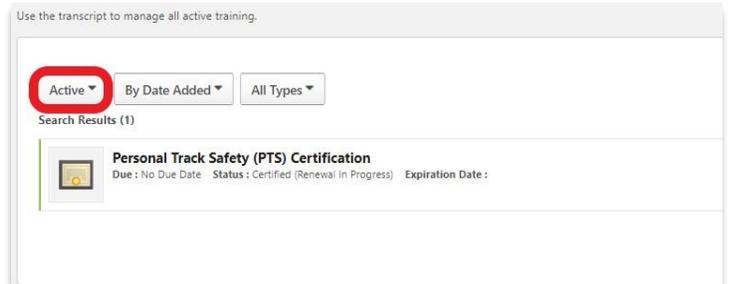
Participants will hover over the **Bio** option and click *About*. This will open a new screen.



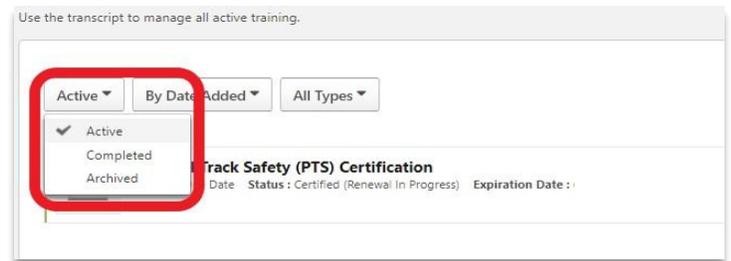
Participants can review and update the **Bio** information.



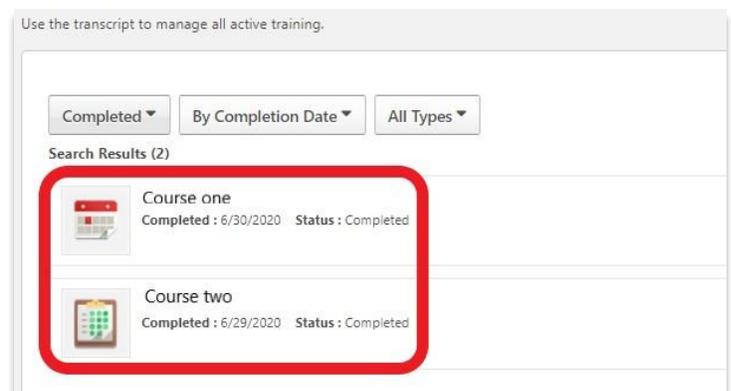
From the **Your Transcript** page participants can click *Active* for more detailed information.



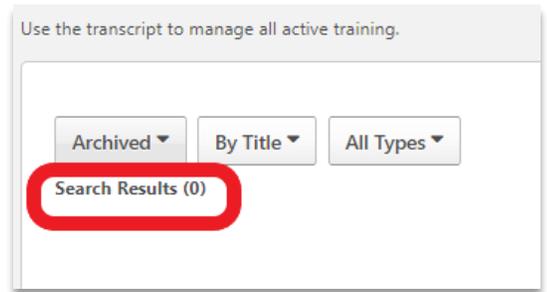
This will open a new dropdown box with the options **Completed** or **Archived**



Completed will show all courses completed.

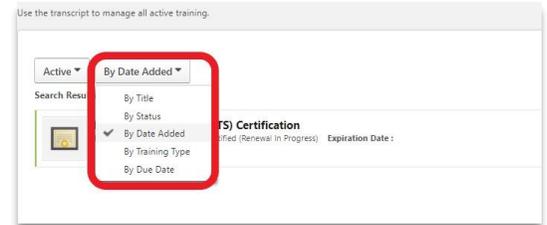


Archived will show courses that are archived.



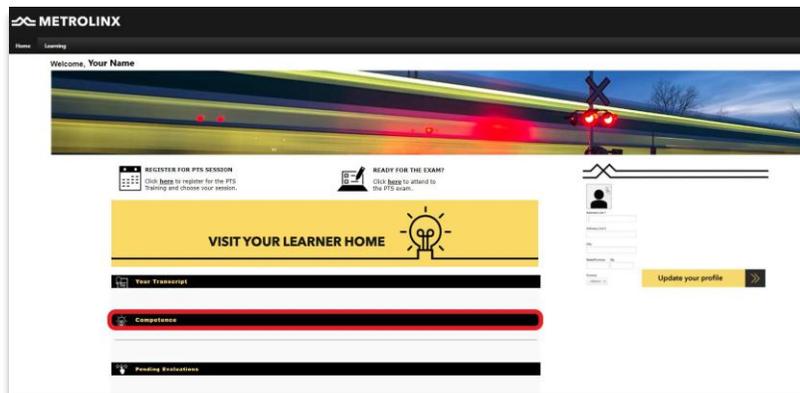
From the main **Your Transcript** page participants can click *By Date Added*. This will allow participants to search by:

- Title
- Status
- Training Type
- Due Date

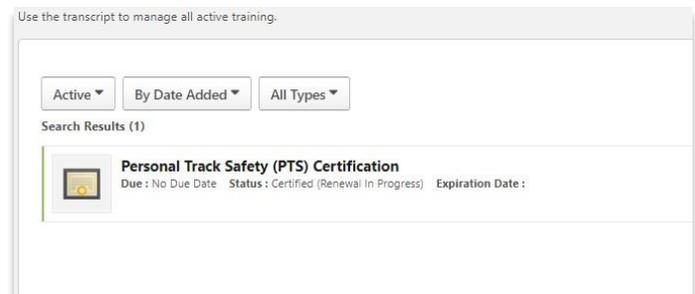


Competence

From the **Welcome** page participants can select *Competence*.



This will allow the same options as *Your Transcript*.



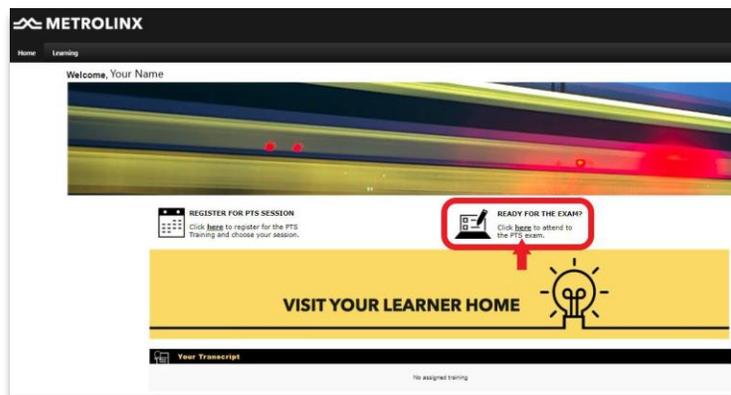
Pending Evaluations

From the **Welcome** page participants will see if there are any *Pending Evaluations* that require attention.

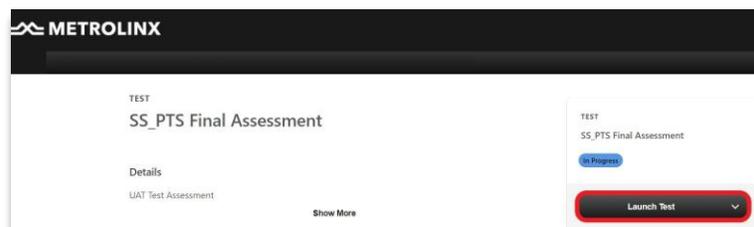


READY FOR THE EXAM?

From the **Welcome** page participants can click *READY FOR THE EXAM?* once the Personal Track Safety (PTS) session has been completed. Participants will click on here to launch the exam.



This will open a new screen where participants will *Launch Test* and complete the examination.

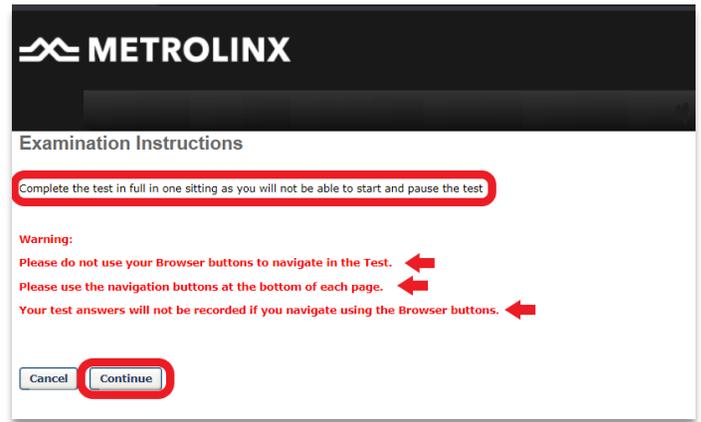


After clicking *Launch Test* the instructions for the exam will open in a new screen.

This will open the Personal Track Safety (PTS) exam.

Participants will follow the steps in the exam screens.

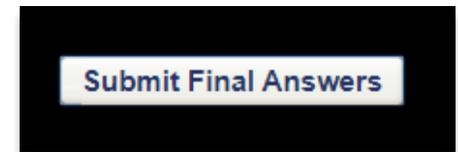
When ready participants will click on the *Continue* icon.



The exam must be completed in one sitting and participants must use the *Back* and *Next* options at the bottom of the page to move through the exam.

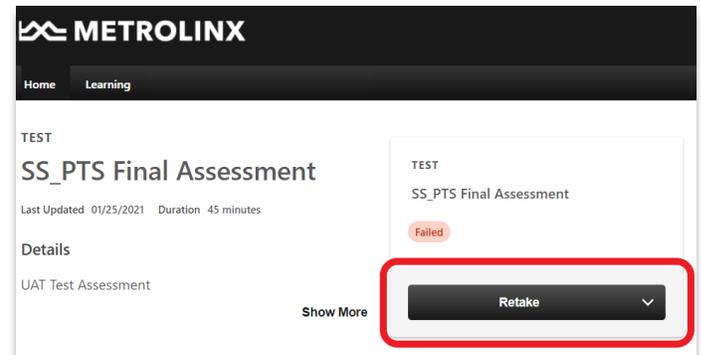


When the exam is complete participants will click *Submit Final Answers*.



Participants must achieve an eighty (80%) percent on the exam to pass.

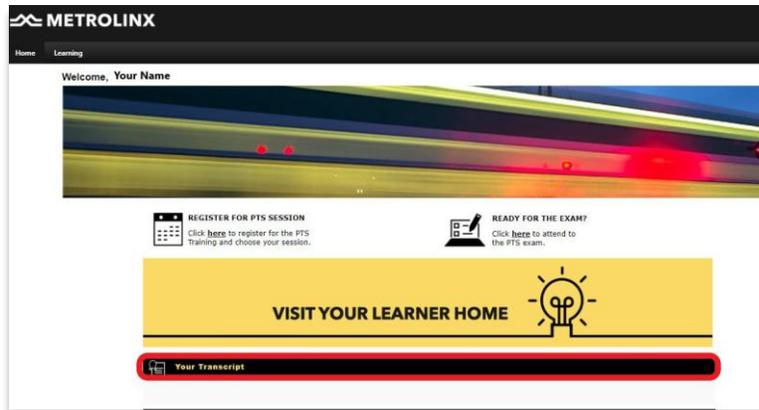
If participants were not successful in completing the exam a screen will open with the option to *Retake*.



Participants will have three (3) attempts to complete the exam. If the participants cannot complete the exam in three (3) attempts they will be required to complete the Personal Track Safety (PTS) session again.

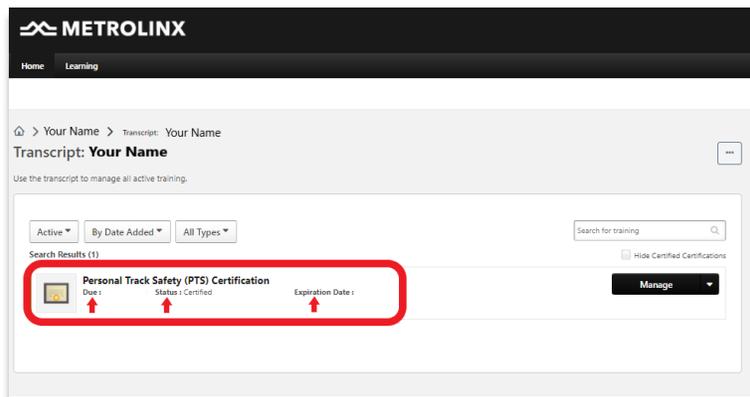
Once the exam has been successfully completed the information will be added to the participant's profile. From the **Welcome** page participants can see the completed Personal Track Safety (PTS) exam in multiple ways.

Participants can click *Your Transcript* to view the information.

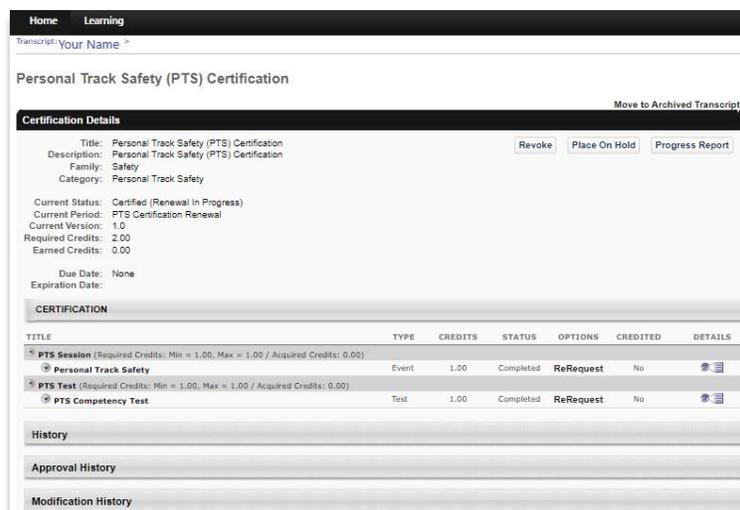


From the new screen participants can see key information about the certification including:

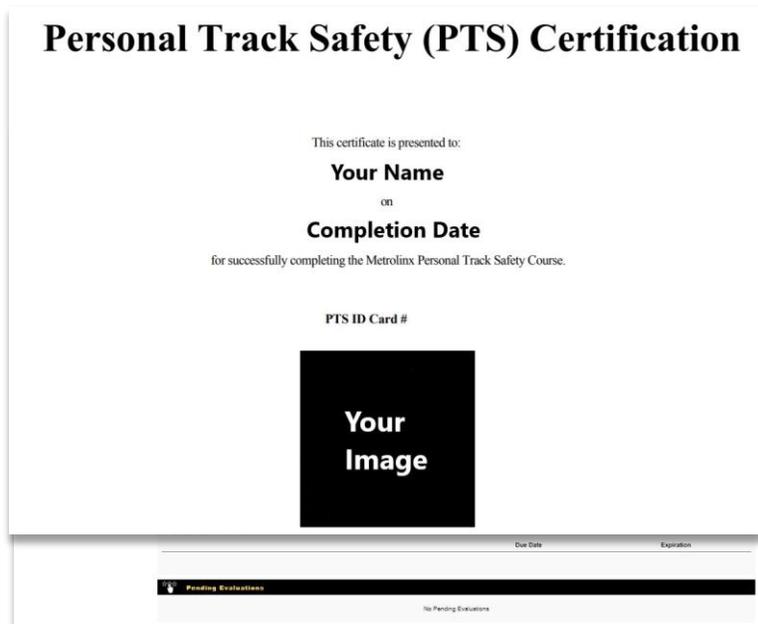
- Status
- Expiration Date



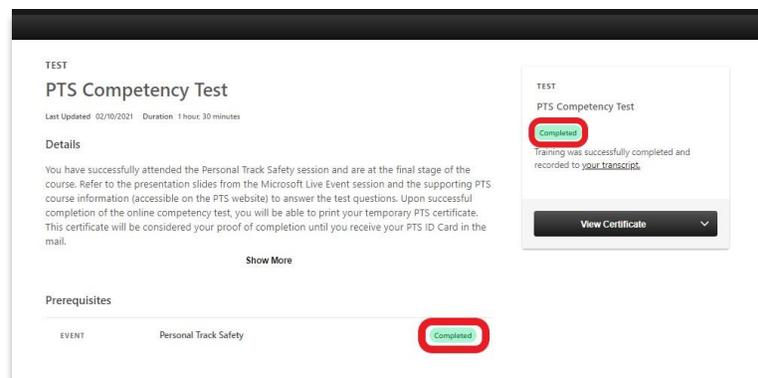
Participants can click *Personal Track Safety (PTS) Certification*. This will open a more detailed report of the session and exam.



Participants can also access the Personal Track Safety (PTS) certification by clicking *Ready for the Exam?* option.



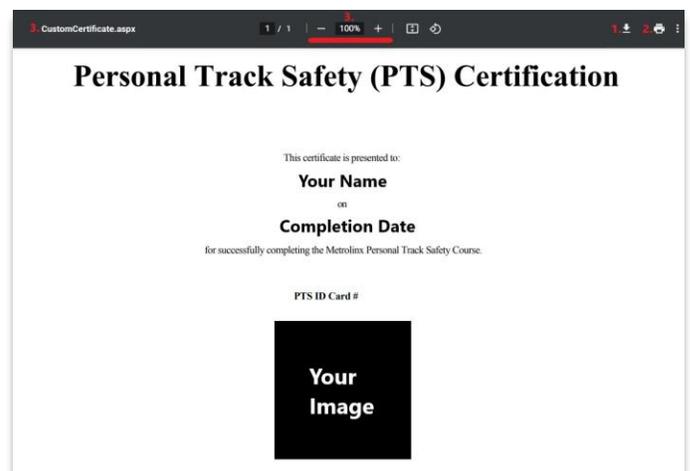
From the screen that opens participants will see the **Completed** icon.



Participants can choose *View Certificate* to view a new screen of the Personal Track Safety (PTS) certificate.

From this screen participants can choose to:

1. Download a copy
2. Print a copy
3. Enlarge or shrink the image

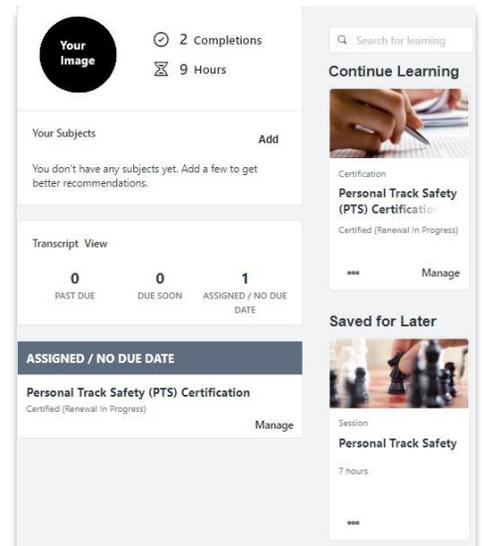


VISIT YOUR LEARNER HOME

From the Welcome page participants can click *VISIT YOUR LEARNER HOME*.



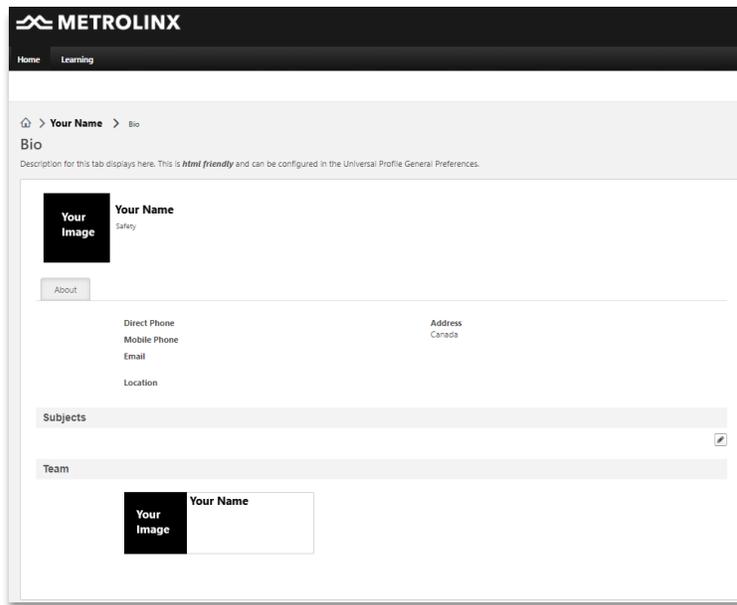
This new window will allow participants to update the account details.



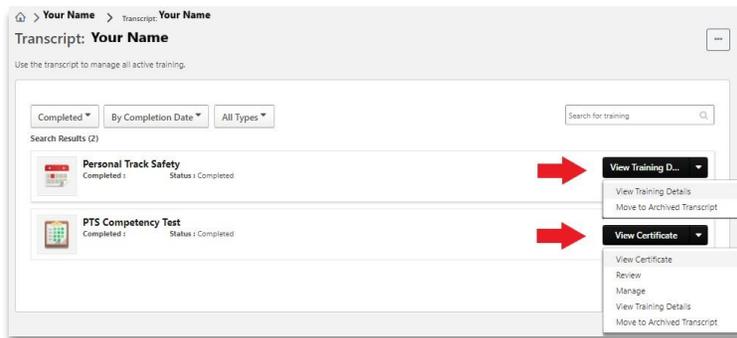
Participants have three (3) choices from the first section.



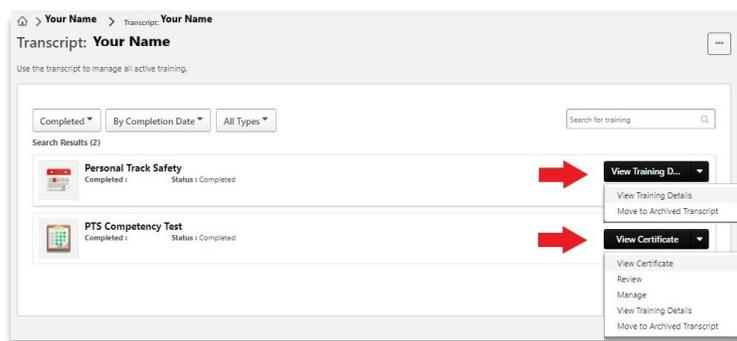
1. When participants click *Your Image*, it will open the **Bio** section and participants can update the information there.



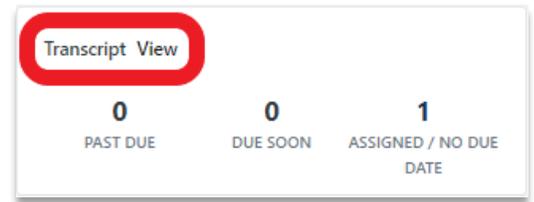
2. When participants click *Completions*, it will open the **Transcript** section. All the options previously detailed are available here.



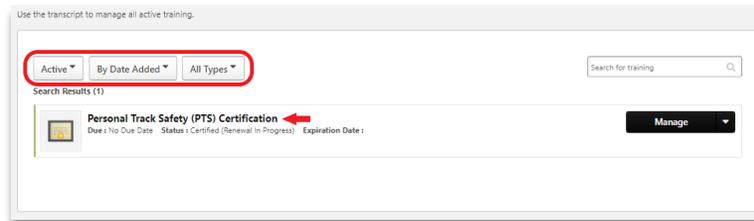
3. When participants click *Hours*, it will open the **Transcript** section.



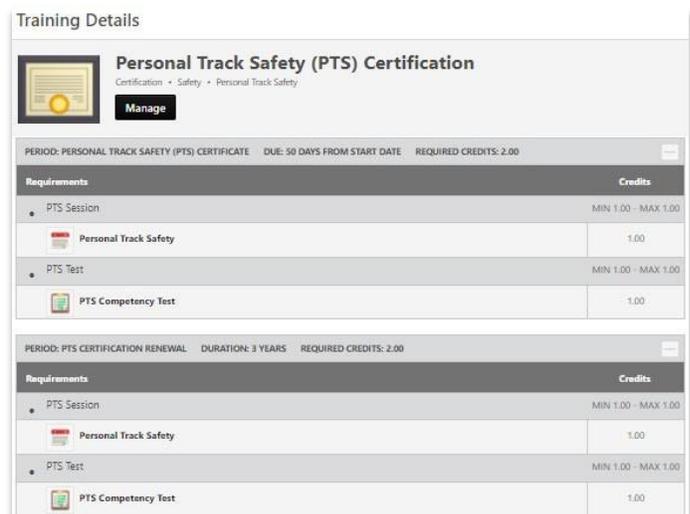
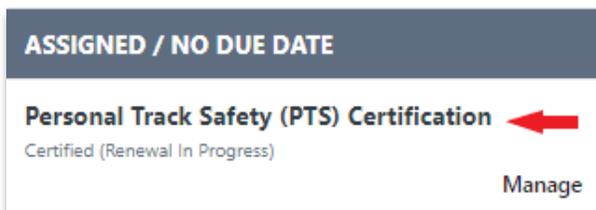
Participants have one (1) choice from the second section.



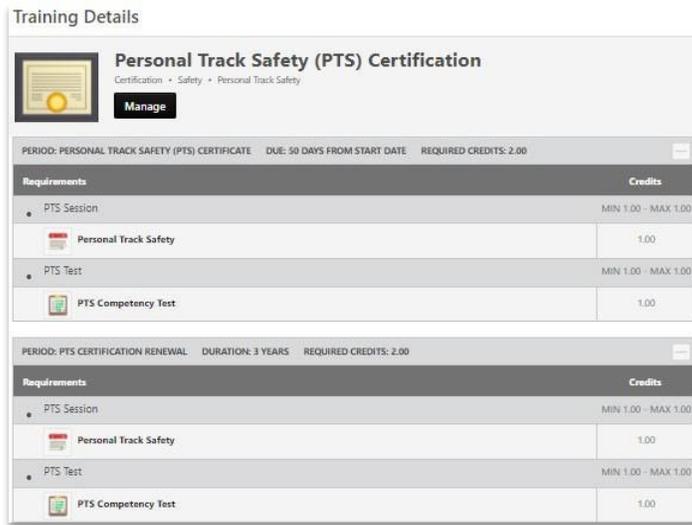
When participants click *Transcript View* it will open the **Transcript** section with all the completed training for view. Participants can also search through the training completed.



When participants click *ASSIGNED / NO DUE DATE* it will open a detailed breakdown of the participants **Training Details**. Participants can view the training and the Personal Track Safety (PTS) certification.

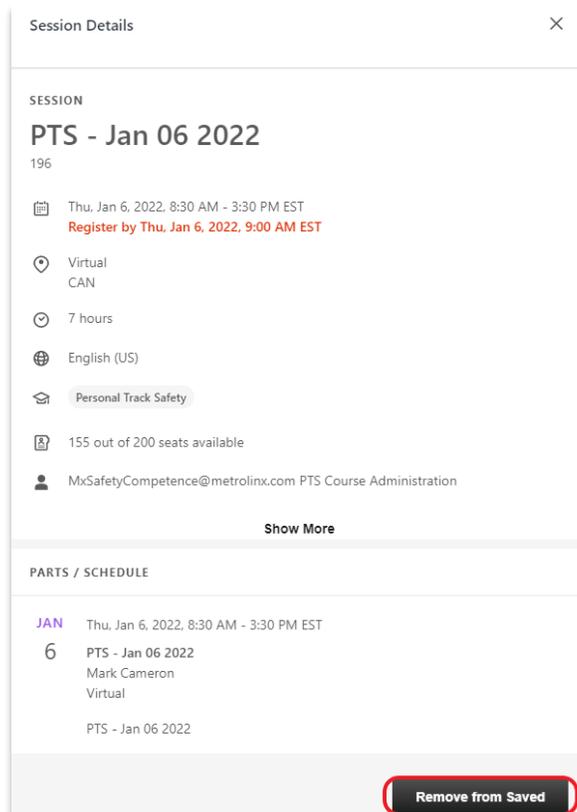
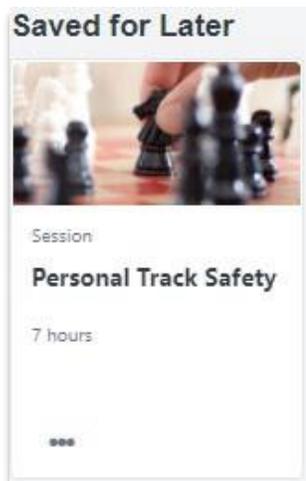


When participants click *Continue Learning* section it will open the same detailed breakdown as listed above.

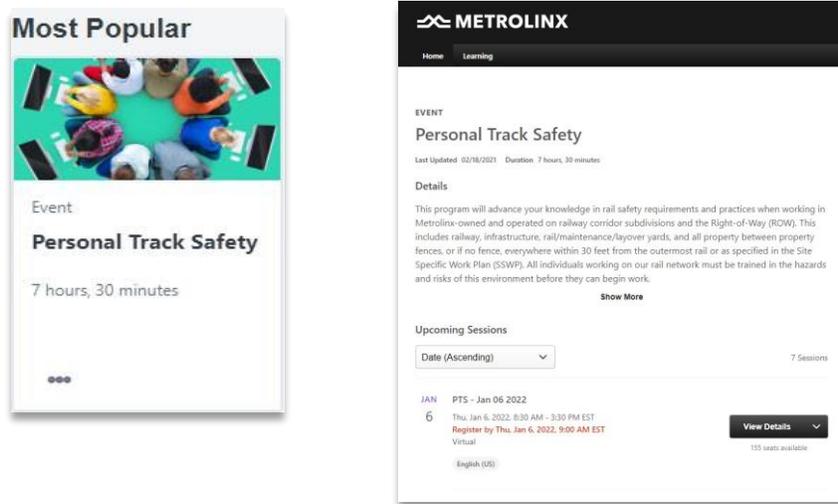


When participants click on *Saved for Later* it will display the information that participants have previously saved.

The example shown here is for Personal Track Safety (PTS) session. Participants can remove the saved items by clicking *Remove from Saved*.



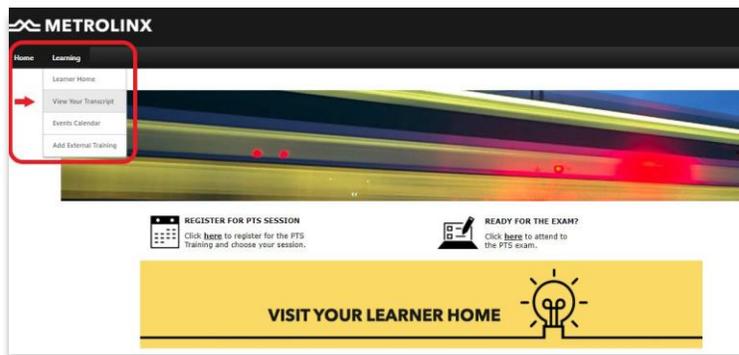
Participants can click *Most Popular*. This will take the participant to the Personal Track Safety (PTS) registration page. As more courses are added this information will be updated accordingly.



Exemption Request

An exemption to the Personal Track Safety (PTS) session can be requested. These are the steps required to do so participants must register for a Personal Track Safety (PTS).

After the participant has registered for a Personal Track Safety (PTS) session, participants will hover the cursor over the **Learning** option on the **Welcome** page and click *View Your Transcript*.

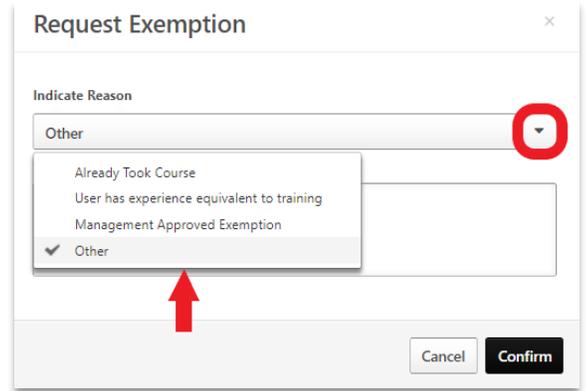


This will open the **Transcript** page. Participants will click *View Training Details* on the Personal Track Safety (PTS) session and click *Request Exemption*.



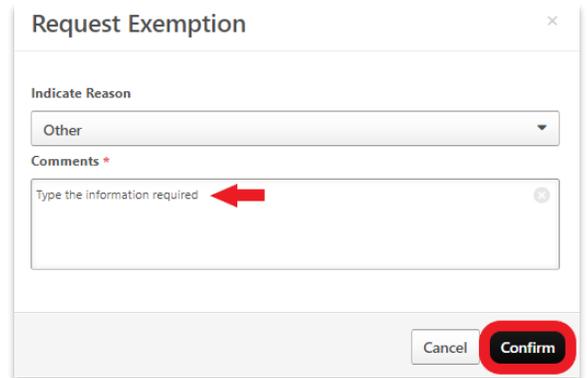
This will open a text box titled **Request Exemption**.

Participants can **Indicate Reason** from a dropdown set of options when **Other** is hovered over.



Participants can add **Comments**.

Participants will click *Confirm* once the information is provided.



This will update the **Transcript** page.



Any supporting documents or training records may be requested from the administrator.

