

## The Awareness and Accountability Vault

The Awareness and Accountability Vault, or Vault for short, will be utilized to share policies, procedures, training, etc. as needed with team members. The Vault is designed to be an ongoing resource of policies, plans, procedures, updates, training, alerts, etc. so new information can be added throughout the year for all team members to acknowledge and have for reference at any time. Terms in the Vault to know include:

- **Document Groups:** Used to organize information (policies, documents, etc.) into grouped sections for easier management and navigation. You can sort your Vault by Document Groups by using the Group by: drop-down menu in the upper-right hand corner on the Vault screen.
- **Document Title:** This is the Title of the Document. Click a Document title to open the item.
- **Description:** This is a description of the Document that is contained within that item.
- **Eff. Date:** The Effective Date. This is when the Document, Policy, Training, etc. began being enforced or put in use.
- **Cert. Status:** The Certification Status. This shows your requirement of the Vault Document. Each Vault Document can be designated as Required, Required Annually or Not Required.
  - **Required:** You are required to read and acknowledge this document at least once. Once you have done so, it will remain “completed” unless updated and/or reset by an administrator.
  - **Required Annually:** You are required to read and acknowledge this document once a year. When it comes time to renew your TIPS Certificate, your previous acknowledgement of the document will be “reset” automatically and you will be required to again read and acknowledge the document.
  - **Not Required:** You are not required to read and acknowledge this document; however it is still in your Vault for reference as needed.
- **Sort By:** The Sort By drop-down menu in the upper-right hand corner of your Vault screen allows you to sort your Vault Documents by Title, Description, Status Date (i.e. Eff. Date), Status (i.e. Cert. Status), and Acknowledgment.

You will notice an open circle next to each Document Title in your Vault – this denotes that the Document has not yet been read and acknowledged. Once it has been read and acknowledged, the circle will change into a checkmark. You will need checkmarks next to all Required and Required Annually items before your Vault is considered ‘complete’.

### How to earn a checkmark for a document:

1. To read and acknowledge review of a document, start by clicking on the Document Title, and this will take you to a new page.
2. You may notice the Status is initially labeled “Not Read” – this will change once you have opened and reviewed the document. Click on the PDF icon under the ‘Document’ column heading to open the PDF document. The Document will open in a new browser tab.
3. Once you have finished reviewing the document you opened, close the browser tab and you will return to the Platform window. You may notice the Status is now shown as “Read.”
  - a. If there are questions set-up for this document, they will need to be answered correctly before you can finish acknowledging the document. To access the questions,

you will see a link that says “Click Here for questions” underneath the table list of PDF(s) icons. Click the hyperlink and answer the True/False or Multiple Choice Questions accurately to continue the acknowledgement process.

- b. If there are no questions for this document, continue to the next step.
4. Type the agreement term specified on the page (e.g. “AGREE”) into the field provided and click ACCEPT.
5. The Platform has a secondary checking-step in place to ensure you are acknowledging the document – you will see a window pop-up with the text “Click OK to confirm your acceptance of this Policy.” Click ‘OK’ to continue.

You are now back at the Vault Screen, where you can see that the document you just read and acknowledged now has a checkmark. **Repeat the same steps** for each “Required” and “Required Annually” Document in the Vault until all have a checkmark beside the Document title.

Once all “Required” and “Required Annually” Documents in the Vault have a checkmark you will have earned your Annual TIPS Certification. You can ensure you have completed all the necessary items by looking at the left-hand sidebar on your Vault Screen. If there is a green check mark next to your organization’s Vault, your certification is complete! If there is an open circle or a half-filled circle next to your organization’s Vault, you will need to go back through your Vault to find what still needs to be completed.