STANDARD OPERATING PROCEDURES (SOP)

FOR

COAST GUARD’S TRAINING SYSTEM

EDUCATION SERVICES OFFICER (ESO)

VOLUME I

GETTING STARTED

Force Readiness Command
Coast Guard Institute
November 2013
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COAST GUARD INSTITUTE NOTICE 1000.1

CANCELLED: 26NOV14

Subj: CH-4 TO EDUCATION SERVICE OFFICER VOLUME I, GETTING STARTED

1. **Purpose.** This promulgates the Standard Operating Procedures (SOP) for the ESO’s collaboration with the Coast Guard Institute.

2. **Action.** Full Time and Collateral duty ESOs should ensure compliance with the provisions of this SOP. Internet release is authorized.

3. **Directives Affected.** None

4. **Major Changes.** Formatting throughout SOP. The following sections/chapters have been changed:
   a. Chapter 1: Page 1-2 updated password requirements.
   b. Chapter 2: Page 2-1 updated Enterprise server link for Questionmark.

5. **Environmental Aspect and Impact Considerations.** Environmental considerations were examined in the development of this Notice and have been determined to be not applicable.

6. **Forms/Reports.** Not applicable.

7. **Printed Copies.** Printed copies of the ESO Volume I, Getting Started, are not available. Distribution is through the CG Institute’s website at [http://www.uscg.mil/hq/cgi/default.asp](http://www.uscg.mil/hq/cgi/default.asp).

8. **Comments and Recommendations.** The next change to the ESO Volume I manual is expected to be completed by November 2014. The CG Institute encourages user recommended revisions and corrections to the ESO Volume I. Comments or recommendations may be submitted by emailing [CGI-DG-CST_DIV@uscg.mil](mailto:CGI-DG-CST_DIV@uscg.mil).

   [Signature]

   LISA L GARCEZ
   Lieutenant Commander, USCG
   Coast Guard Institute
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Chapter 1: **GETTING STARTED AS AN ESO**

A. **Designation and Relief of Education Service Officers (ESO).**

1. **Policy.** In accordance with the Performance, Training and Education Manual COMDTINST M1500.10(series), each CO/OINC will designate a collateral duty Education Services Officer (ESO) if a full time ESO is not assigned to the unit. The Coast Guard Institute requires all designations be in writing by Coast Guard Memorandum. The ESO is the unit’s primary administrator of the End-of-Course Tests (EOCTs) and Rating Advancement Tests (RATs), and must be a Chief Petty Officer or above, or equivalent civilian grade of GS7 or above.

2. **ESO Designation and Relief Memos.**

   a. At the time of designation as a primary or alternate ESO, a copy of the designation memo shall be sent to the Course Support and Testing Division (CST) of the Coast Guard Institute (CG INSTITUTE), along with the relief memo, for the ESO that is being relieved. Both memos must be signed by the Commanding Officer (CO) or Officer in Charge (OINC). Please send all designation and relief memos together via Training & Academia Customer Care Tracking System (TACCTS), through the relieving ESO’s TACCTS account. [Example: The relieved ESO is the new alternate ESO; in this case you would need to send a designation memo for the new ESO, a relief memo for the relieved ESO, and a designation memo for the alternate ESO]. This action is necessary in order to properly manage the TACCTS accounts. If an ESO does not submit an ESO designation memo, they will not receive a TACCTS account or be recognized as an ESO by the CG Institute. If the relieving ESO is not available, send an ESO Designation memo to the CST Division via other methods listed below, and state the name of the ESO that was relieved. The CG Institute will then remove the previous ESO from TACCTS.

   Methods to send designation and relief memo:

   (1) TACCTS (using the relieving ESO’s account) (preferred method).

   (2) CST email address – CGI-DG-CST_DIV@uscg.mil

   (3) CST fax number - 405-954-3684.

   (4) Regular mail - Commanding Officer (CST)

   U.S. Coast Guard Institute

   b. Examples/templates of an ESO Designation and Relief memo on the CG Institute’s website. Once the designation memo is received by the CST Division, the ESO will be added to the ESO email distribution list and a TACCTS account will be created. The ESO will receive an email from personnel in the CST Division containing their “user name” and “temporary password” for TACCTS. A link to the TACCTS webpage is located on the CG Institutes website. The relieved ESO’s TACCTS account will be deactivated unless they are becoming the alternate. In this case, their status will be changed to alternate ESO in TACCTS and will use the same username and password that they have been using.
B. TACCTS for new ESOs.

1. TACCTS is the web-based tool used for the ESOs to interact with the CG Institute in solving issues.

2. TACCTS Log in procedures:
   a. Once the email containing your “username” and “temporary password” is received.
   b. Click on the TACCTS link located on CG INSTITUTE website.
   c. The TACCTS login page will display.
   d. Type in your TACCTS “username.”
   e. Type in the TACCTS “temporary password.”
   f. Click on “Login.”
   g. You will be prompted to change your password.
   h. Type in your new “password.”
      (1) Min 11 characters, max 15 characters.
      (2) Must contain at least one lowercase and one uppercase letter.
      (3) Must contain at least one numeric value and one special character.
      (4) Cannot begin or end with a numeric value or a special character.
      (5) Repeating characters are only counted as one character. Example: Tempp = Temp.
      (6) Passwords must be changed every 90 days.
      (7) Accounts are deactivated after 6 months of inactivity.
   i. Type it again, in the “verify password” block.
   j. Click on “submit.”
   k. The TACCTS home page will open.
   l. Click “Course Support and Testing” option. You will then be on the CST main page.
m. Click the help link in the upper right corner of the screen to view the SOP for CST TACCTS.

n. Double click the “ESO SOP Guide”, for procedures on how to use the TACCTS system.
Chapter: 2  E-TESTING QUESTIONMARK PERCEPTION ACCESS

A. QuestionMark Perception Access.

1. **Overview.** Questionmark Perception (QMP) is the web-based application the Coast Guard has selected for all eTesting. ESO’s and their members will access electronic Rating Advancement Tests (RATs) via the CGPortal and the Learning Management System (LMS).

a. ESOs will be able to do two things with their QMP account:

   (1) Enable members to enter the exam by entering their QMP username and password at the proper time.

   (2) Log in to the Enterprise server at [http://etesting.uscg.mil](http://etesting.uscg.mil) to change their password.

b. Password resets are handled the same for QMP and TACCTS.

2. **Requesting Access.**

a. To request access to Questionmark Perception, ESO’s must have access to TACCTS. If an ESO does not have access to TACCTS, they must provide an ESO Letter of Designation (ref. 1.1) to the CST Division.

b. Once TACCTS access is given, submit a request through TACCTS requesting “E-Testing Access Account.”

B. QuestionMark Perception Access Removal. ESO access to QMP is removed upon Relief of ESO.
Chapter 3: **ESO EXAM ELIGIBILITY AND WAIVER**

A. **Eligibility and Waiver Request.**

1. **Overview.** Designated ESOs are ineligible to take CG Institute exams for six months if they currently hold the exam in their inventory, held the exam in an inventory within the last six months or administered the exam within the last six months (i.e. DWINTO/DWINTR). This may be waived by the Commanding Officer, Coast Guard Institute.

2. Waiver requests for specific tests may be emailed to the CG Institute (CST), *(CGI-DG-CST_DIV@uscg.mil)* stating the reason for the request and the last date the test was administered. The respective ESO's command should be copied on all requests. Email approval, if appropriate, will be provided and should be used as the authority for the ESO that will administer the exam.

B. **Rating Exams/EPMEs.** No ESO shall hold a Rating Exam/EPME that they are required to take. There is no waiver of rating exams for ESO’s in relation to the six month requirement.
Chapter 4: BECOMING A LIBRARY UNIT

A. Introduction.

1. Non-Library Unit Definition. A Non-library Unit is a unit authorized by the CG Institute to order and hold EOCTs/RATs for specific members that are enrolled in CG Institute courses. These EOCTs/RATs are specifically assigned to a member at the unit.

2. Library Unit Definition. A Library Unit is a unit authorized by the CG Institute to maintain a library of EOCTs/RATs for use by their personnel. These EOCTs/RATs are not specifically assigned to any member at the unit.

B. Request to be a Library Unit. A unit requesting to become a Library Unit must submit a TACCTS issue or an e-mail request to CGI-DG-CST_DIV@uscg.mil.

1. All tests that were assigned to individuals, prior to its library status, should be destroyed locally, recorded in the unit Destruction Log and reported to the CG Institute CST Div via TACCTS using the “Add Issue” option. Include a detailed list of test destroyed with member name and EMPLID.

2. The CG Institute will send the ESO a packet containing:

   a. A memorandum of understanding (MOU) between the CG Institute and the unit. The ESO must sign the MOU and return it to the CG Institute (keeping a copy for the unit). The unit must retain this MOU on file until the Library Unit status is disestablished.

   b. A survey to be filled out by the ESO. It will list the EOCTs/RATs the unit is requesting to keep in the library.

3. The ESO will return the signed MOU and survey to the CG Institute CST Div by:

   a. TACCTS.

   b. CST email address – CGI-DG-CST_DIV@uscg.mil

   c. CST fax number - 405-954-3684.

C. Action taken by CG Institute once MOU and Survey is received. The CG Institute will take the following action upon receipt of the MOU and survey:

1. Requested EOCT/RAT will be added to Library Unit inventory in TACCTS.

2. Requested EOCT/RAT will be mailed to the unit within 3 business days.

3. When the new tests are mailed to the ESO, the CST Division will change the status on the same TACCTS issue to “Pending Notification of Receipt.”
D. **Action Upon Receipt of EOCT/RAT.** Take the following action upon receipt of initial EOCT/RAT library from CG Institute:

1. Ensure all requested materials were received.

2. Acknowledge the inventory is correct by logging into TACCTS and verifying the EOCT/RAT received to the EOCT/RAT inventory listed in TACCTS.

3. The ESO will go to the “Pending” TACCTS issue and respond in the comments field.
   a. Ensure all requested materials were received.
   b. Acknowledge the inventory is correct by logging into TACCTS and verifying the EOCT/RAT received to the EOCT/RAT inventory listed in TACCTS.
   c. The ESO will go to the “Pending” TACCTS issue and respond in the comments field.

4. Do not open a new TACCTS issue by responding to the same issue. A complete history of the transaction is maintained. *[For Procedures on how to submit TACCTS issue, see SOP for TACCTS under the help link on the CST TACCTS home page]*.

E. **Unit Course Library.**

1. Courses being requested to stock inventory should be limited to those that are applicable to the unit and used as a loan check out to members assigned. To review all current courses and EOCTs/RATs offered by the CG Institute, see EOCT/RATs Course Information Page posted on the CG INSTITUTE’s website at [http://www.uscg.mil/cgi/downloads/EOCT.pdf](http://www.uscg.mil/cgi/downloads/EOCT.pdf).

2. Classified course material will not normally be included or authorized for a Library Unit. Request for a classified library may be warranted under extenuating circumstances. The request can only be approved by the CG Institute. *[See Section 2, Order Classified Material]*