

E-Mail ALSPO B/12

Subj: Direct Access Technology Refresh – Person Profile

Ref: (a) [Coast Guard Servicing Personnel Office \(SPO\) Manual, PPCINST M5231.3, Part III, General Transactions, Chapter 1, Manage Competencies](#)

Purpose The Purpose of this E-Mail ALSPO is to transmit procedures for the maintenance of member competency data using the “Person Profile” in Direct Access II.

Person Profile Definition The Person Profile describes a person's skills, competencies and accomplishments.

Discussion As part of the Coast Guard’s technology refresh effort to move HR functions from PeopleSoft version 8.0 (Direct Access I) to a supported version of PeopleSoft (version 9.1-Direct Access II), CG-631 will be moving Competencies, Languages (including Foreign Language Test Results), Professional Memberships, Education Accomplishments, Licenses and Certifications data and supporting business processes to the Person Profile in PeopleSoft version 9.1.

Applications and queries that display or report Person Profile information (e.g. CG Member Info., e-resume, Personal Data Information File, CGBI-ESS/OSS) are not changing at this time. Data entered in the Person Profile will be “messaged” to the appropriate table(s) in the DA I legacy application. There will be a delay of approximately 15 minutes before updates completed in the Person Profile are visible in the legacy applications.

Member Test Results (which includes ASVAB Scores and CGI Correspondence Course completions) and Training Completions are not moving to the Person Profile at this time.

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Effective Date Direct Access will be unavailable from 1700 (CDT) Friday, 27 April to 0500 Monday, 30 April. CG-631 plans to conduct project migration, data conversion, and transition of messaging and interfaces during this time, access to DA I Competency, Education, Languages, Licenses & Certifications and Membership applications will terminate at 1700 (CDT) Friday, 27 April. After the cutover, these legacy applications can be used for “view only” access to member data. All future updates must be processed through the new Person Profile.

The Person Profile will be available for use beginning at 1200 (CDT) Monday, 30 April 2012.

Note: Users with access to the Person Profile (see below) cannot view their own data in the Person Profile. There is no “view only” component in the DA II implementation. Users attempting to access their own records will receive an error message informing them that they cannot modify their own records. These users should use the legacy DA I applications to view data.

User Roles for Access

Users at SPOs (CGHRS role users) will have the ability to access and update the areas of the Person Profile described herein. Data entry in the Person Profile does not require review and approval.

Users at field units that have executed a memorandum of understanding with their SPO for maintenance of member competency data (CGFIELDADM role users) will also have access the Person Profile components with the exception of the Education component.

Educational accomplishments will have to be forwarded to the SPO for data entry.

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User Roles for Access (cont'd) CGFIELDADM role users will also gain access to the Honors & Awards component, which was moved to the Person Profile in June 2011 (see [E-Mail ALSPO E/11](#) for data entry procedures).

Educational Services Officers (ESOs) (CGFTESO role users) will have access to the Languages component so that they may enter Defense Language Proficiency Test (DLPT) results in the system.

Procedures SPO and Field Administrator data entry procedures for Competencies (including Mass Update procedure), Education Accomplishments (Note: SPO Access Only), Languages & Foreign Language Test Results (Note: ESO access also permitted), Licenses & Certifications and Professional Memberships are attached as enclosures (1) through (6). Additional information and tutorials are available from within the DA Online Help (www.uscg.mil/ppc/ps) and PPC's Person Profile information web page at www.uscg.mil/ppc/da/personprofile.

Directives Affected The contents of this E-Mail ALSPO message will be incorporated into the applicable sections of reference (a). This E-Mail ALSPO message provides interim guidance which shall expire one year from the date of issuance unless it is incorporated into an appropriate PPC publication, reissued, or cancelled.

Questions Questions regarding the content of this E-Mail ALSPO message may be directed to PPC Customer Care at:

 (866) 772-8724/(785) 339-2200
 <http://cgweb.ppc.uscg.mil/ccb> (Online Trouble Ticket/Inquiry Form)
 PPC-DG-CustomerCare@uscg.mil (E-Mail)

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Released by Internet release authorized.

/s/
J. D. PHILLIPS, CAPT, USCG
Commanding Officer

Enclosures: (1) [Competencies and OSCs User Guide](#)
(2) [Mass Update Awards or Competencies User Guide](#)
(3) [Education User Guide](#)
(4) [Languages & FLP User Guide](#)
(5) [Licenses & Certifications User Guide](#)
(6) [Professional Memberships User Guide](#)

Copy: COMDT (CG-1B1)
FORCECOM (FC-Tepd/Foreign Language Program Manager)
Individual Direct Access “CGFIELDADM” (Field Unit Administrators) and
“CGFTESO” (Full-Time ESO) Role Users

UNITED STATES COAST GUARD



Person Profile

Competencies & Officer Specialty Codes (OCSs)

3/5/2012

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Step by step instructions on adding, updating and deleting member competencies in Direct Access

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Introduction

This section provides the procedure required for entering or updating a member’s competencies. User will be able to update a member’s competency upon receipt of:

- Competency Code Assignment Letter from Unit Commanding Officer
- Other form/correspondence authorizing assignment or removal of a competency code.

1 Portal Navigation

The user can navigate to the Person Profiles page using the path below. At any time, if a user needs to return to the home screen, the user can click the “Home” link in the upper right-hand corner of the window.

Enterprise Menu > Workforce Development > Profile Management > Profiles > Person Profiles

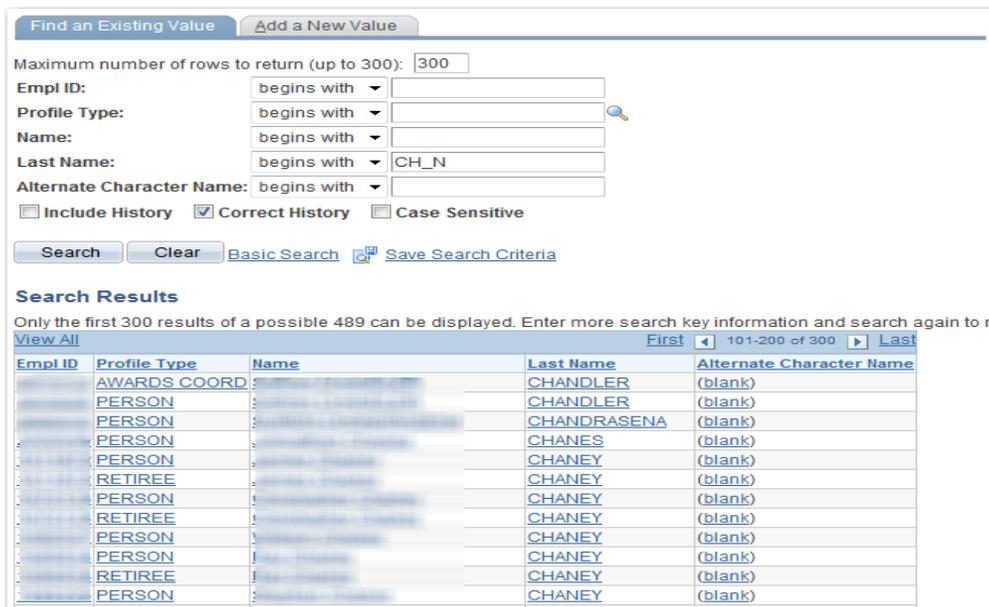
Competencies: This navigation takes the user to the Person Profile screen. competencies and OSC’s are recorded on the Person Profile screen.

2 Wildcard Search

Direct Access supports the use of three wildcard features when searching for data. The wildcards can be helpful in finding the exact information that user wants to process. The following are the supported standard wildcard features.

| Character | Function |
|------------------|--|
| % (percent sign) | Match one or more characters. |
| _ (underscore) | Match any single character. |
| \ (back slash) | Escape character – don’t treat the next character as a wildcard. |

When attempting to search for a member, you may use the “wildcard” search feature. One commonly used wildcard is the “_” sign. The use of this sign represents a single letter instead of a group of letters. For example, if you would like to see all the members whose last names contain the letters “C”, “H” and “N”, in that order, the “_” wildcard would be used to represent a single letter between the characters in which it is placed. An example of the search results when a “_” is used is located below.



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Another wildcard that is commonly used is the “%” sign. This wildcard is used to represent multiple characters. For example, if you would like to see all members whose last names contain the letters “C”, “H” and “N”, regardless of the order of the letters in the name, the “%” wildcard should be used. Below is an illustration of this example.

The screenshot shows a search interface with two tabs: "Find an Existing Value" (selected) and "Add a New Value". Below the tabs, there are several search criteria fields:

- Maximum number of rows to return (up to 300): 300
- Empl ID: begins with []
- Profile Type: begins with []
- Name: begins with []
- Last Name: begins with CH%N
- Alternate Character Name: begins with []

There are also three checkboxes: Include History, Correct History, and Case Sensitive. Below these are buttons for Search, Clear, Basic Search, and Save Search Criteria.

Search Results

Only the first 300 results of a possible 1459 can be displayed. Enter more search key information and see [View All](#) First 1-100 of 300 Last

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|------------|--------------------------|
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | RETIREE | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | AWARDS COORD | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHADBAND | (blank) |
| | PERSON | | CHADBOURNE | (blank) |

3 Entering a new Competency

When information about a member's competency is received and ready to be entered into Direct Access, navigate to the following page:

Portal Link: Person Profile

Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Direct Access also remembers recently used pages. If you have used the Person Profile page recently, you can go to Favorites > Recently Used > Person Profiles

3.1 Locating the Member

1. Use the Search record to pull up the member's Person Profile using the member's EMPLID or name.

HINT: When attempting to search for a member, you may use the Direct Access "wildcard" search feature. Refer to section [3. Wildcard Search](#) for further instruction

Person Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300): 300

Empl ID: begins with []

Profile Type: begins with []

Name: begins with []

Last Name: begins with []

Alternate Character Name: begins with []

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

2. Click the Search button. If the search returns more than one record, be sure to select the correct member's record that has "PERSON" in the Profile Type column



3.2 Viewing Competencies

1. Follow the instructions in section “[4.1. Locating the Member](#)” to search for the member’s record. The main Person Profile page will display.

Person Profile

Empl ID: [Redacted] [Member Profile](#)

Profile Type: PERSON Person

*Profile Status: Active

*Description: [Redacted]

Profile Actions: <Select Action> [Info] [Print]

You have successfully saved those profile changes that do not require approval.

Competencies **Qualifications** Education

▼ Competencies (Approval Not Required) Customize | Find | View All | First 1-5 of 6 Last

| ID | Competency | *Effective Date | Evaluation Type | Proficiency | View History |
|---------|---|-----------------|-------------------|-------------|----------------|
| 2MINST | 2M Instructor/Recertifier | 01/30/2012 | Approved/Official | Good | [View] [Trash] |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good | [Trash] |
| OODLT | 225 WLB UMW OOD | 06/20/2006 | Approved/Official | Good | [Trash] |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good | [Trash] |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good | [View] [Trash] |

+ Add New Competencies

Competencies **Qualifications** Education

Save

Competencies content section will display under the competencies link. A list of the member’s current competencies will display in the section.

▼ Competencies (Approval Not Required) Customize | Find | **View All** | First 1-5 of 6 Last

| ID | Competency | *Effective Date | Evaluation Type | Proficiency | View History |
|---------|---|-----------------|-------------------|-------------|----------------|
| 2MINST | 2M Instructor/Recertifier | 01/30/2012 | Approved/Official | Good | [View] [Trash] |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good | [Trash] |
| OODLT | 225 WLB UMW OOD | 06/20/2006 | Approved/Official | Good | [Trash] |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good | [Trash] |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good | [View] [Trash] |

+ Add New Competencies

2. If the member has more than five competencies, they won’t display unless you click “View All.”
3. Click on the “+ Add New competencies” link to add new competencies to a member’s profile.

- Competencies with the same competency codes are grouped together. The  icon in the “View History” column signifies that the member has received the competency more than once. Click on the icon to view all instances of the competency.

Person Profile
View Historical Items

| Competencies (Approval Not Required) | | | | |
|--------------------------------------|---|--------|-------------------|--------------|
| Effective Date | Competency | ID | *Evaluation Type | *Proficiency |
| 01/30/2012 | 2M Instructor/Recertifier | 2MINST | Approved/Official | Good |
| 01/17/2012 | 2M Instructor/Recertifier | 2MINST | Approved/Official | Good |

[Return to Profile](#)

3.3 Adding a New Competency

Follow the steps below to add a new competency to a member’s profile.

- To add a new competency to the member’s profile, Click on the click “+ Add New Competencies”.

| Competencies (Approval Not Required) | | | | | |
|--------------------------------------|---|-----------------|-------------------|-------------|---|
| ID | Competency | *Effective Date | Evaluation Type | Proficiency | View History |
| 2MINST | 2M Instructor/Recertifier | 01/30/2012 | Approved/Official | Good |   |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good |  |
| OODLT | 225 WLB UMW OOD | 06/20/2006 | Approved/Official | Good |  |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good |  |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good |   |

[+ Add New Competencies](#) 

- On the “Add New Competencies” page, enter the following fields:

Note: All the fields will be blank if the member does not have any competencies present in the system.

Person Profile

Add New Competencies

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Add item details. Select OK to apply changes and return. Select Cancel to return. Select Apply and Add to continue adding additional items.

Details Find | View All First 1 of 1 Last

*Effective Date: 01/30/2012  

*Competency: 

Evaluation Type: Approved/Official

*Status: Active 

Rating Model: PSCM Competency Management Scale

Proficiency: 3-Good 

Verified By: On the Job Training 

Year Last Used:

Year Acquired:

Years Of Experience:

| Field | Description/Instructions |
|--|--|
| * Effective Date (Required) | <p>This field defaults to today’s date. You can change the date. By clicking on the calendar icon. Effective date should be the date the competency was assigned to the member, i.e. the date the member’s CO certified the member as qualified to hold the competency or the date the member graduated/completed the course of instruction.</p> <p>Guidelines for entering Effective Date:</p> <ul style="list-style-type: none"> • DO NOT enter the current date for an effective date unless the member received the competency on the same day that the record is being entered into Direct Access. • DO NOT user a date in the future |
| * Competency (Required) | <p>Enter the competency code or, search for the competency code by clicking on the magnifying glass. The magnifying glass will bring up the menu options.</p> <p><i>Note: Competency codes are grouped by Knowledge, Skill, Ability and Other. You can sort by using the Content Group functionality. Example below shows all the competency codes that are related to sub-group of SKILL.</i></p> <p><i>Reference: Competency Dictionary</i> https://cgportal.uscg.mil/lotus/my poc?uri=dm:fdb6a6004098cf7885d3973b01f2374b&verb=view</p> |
| *Evaluation Type (Defaulted) | This field defaults to “Approved/Official”. DO NOT change this field |
| *Status (Required) | This field defaults to “Active”. DO NOT change this field |
| Rating Model | This field will default to a Rating Model associated to the competency being selected. This is a display only field and cannot be changed. |

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| | |
|-----------------------------------|---|
| *Proficiency (Required) | Click the drop down arrow to select the member’s Proficiency for the competency. |
| Verified By | This field defaults to “On the Job Training”. This field indicates the means by which the competency was verified. <i>Refer to the Competency Dictionary to select the Verified By field value associated with the competency being selected</i> |
| Year Last Used | This field is optional. Enter the year the competency was last used. |
| Year Acquired | This field is optional. Enter the year the competency was acquired. |
| Years of Experience | This field is optional. Enter the cumulative years of experience using/demonstrating the competency |

For fields that have the ‘Lookup’ icon next to it, you may narrow the search by clicking on the icon and entering a value in one or many of the search fields on the Lookup page.

- a. **Content Item ID:** Enter all or part of the competency code
- b. **Content Group Type:** N/A
- c. **Content Group:** N/A
- d. **Description:** Enter all or part of the title of the competency

Look Up Competency

Content Type: COMPETENCY

Content Item ID: begins with []

Content Group: begins with SKILL [🔍]

Type: []

Content Group: begins with [🔍]

Description: begins with []

Look Up Clear Cancel [Basic Lookup](#)

Search Results

Only the first 300 results of a possible 743 can be displayed. Enter more search key information and search again to reduce the number of search results.

View 100 First 1-300 of 300 Last

| Content Item ID | Content Group Type | Content Group | Description |
|-----------------------------|--------------------|---------------|--|
| 2MMRPR | SKILL | C4IT | Microminiature Repr Tech |
| 2MRPR | SKILL | C4IT | Miniature Repr Tech |
| A&PCERT | SKILL | AVI | Airframe & Powerplant Cert |
| A&PINSP | SKILL | AVI | FAA Inspection Authorization |
| AAIW/SM | SKILL | AVI | Avi Int Weps Sys Maint Tech |
| ACET/C | SKILL | C4IT | ACET Computer Technology |
| ACET/E | SKILL | C4IT | ACET Electrical/Electronics |
| ACET/M | SKILL | ENGI | ACET Mechanical Technology |

3. Click “OK” to return to the Person Profile page.
4. Click “Save” at the bottom of the Person Profile page to commit the changes.

NOTE: If the wrong competency was selected, delete it and repeat Step 4.3.

3.4 Adding a Previously Granted Competency

Follow the steps below to add a new row for a competency that currently exists in the member’s profile.

NOTE: The same competency can be granted multiple times. In these cases, the procedure to add the competency to a member’s Person Profile is slightly different. To add another instance of the same competency, follow these steps:

1. Locate the competencies content section on the competencies tab. A list of the member’s current competencies will display.
2. In the competency column, click on the existing competency row.

When a competency is granted multiple times, only the most recent entry will be displayed in most DA I/8.0 applications and reports

| Competencies (Approval Not Required) | | | | | | Customize | Find | View All | First | 1-5 of 6 | Last |
|--------------------------------------|---|----------------|-------------------|-------------|--------------|-----------|------|----------|-------|----------|------|
| ID | Competency | Effective Date | Evaluation Type | Proficiency | View History | | | | | | |
| 2MINST | 2M Instructor/Recertifier | 01/30/2012 | Approved/Official | Good | | | | | | | |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good | | | | | | | |
| OODLT | 225 WLB UW OOD ← | 06/20/2006 | Approved/Official | Good | | | | | | | |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good | | | | | | | |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good | | | | | | | |

[+ Add New Competencies](#)

3. The user will be directed to the “Update Competencies” page. Click on the sign in the top right corner of the Detail box to insert a new effective dated row.

NOTE: Data from the previous record will be brought forward and populated on the new row.

Person Profile

Update Competencies

Empl ID:

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View All | First | 1 of 1 | Last

*Effective Date:

Competency: OODLT 225 WLB UW OOD

Evaluation Type: Approved/Official

*Status:

Rating Model: GOOD Good (Single Tier)

Proficiency:

Verified By:

Year Last Used:

Year Acquired:

Years Of Experience:

4. A new competency record is created with the current date populated in the Effective Date field. Also, the record will say “1 of x” in the upper right corner of the record. Any fields that were populated on the previous competency row will be brought forward and populated on the new row.

Person Profile
Update Competencies

Empl ID: [REDACTED] [REDACTED]
 Profile Type: PERSON Person
 Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View All First 1 of 2 Last

*Effective Date: 01/30/2012
 Competency: OODLT 225 WLB U/W OOD
 Evaluation Type: Approved/Official
 *Status: Active
 Rating Model: GOOD Good (Single Tier)
 Proficiency: Good
 Verified By: On the Job Training
 Year Last Used: 2006
 Year Acquired: 2006
 Years Of Experience: [REDACTED]

5. Complete the fields (if necessary) as indicated in section “[4.3 Adding a New Competency](#)”.

NOTE: The effective date for the new competency cannot be prior to the existing row. If a competency needs to be recorded that is prior to the current entries, the user will have to follow steps in “[4.5. Adding a Historical Dated Competency for the Same Type](#)” to enter a historical competency row.

6. Click “OK” to return to the Person Profile page. Upon returning to the Qualifications tab, the multiple records  icon will display.
7. Click “Save” at the bottom of the Person Profile page to commit the changes.

3.5 Adding a Historical Dated Competency for the Same Type

The effective date of the competency being entered cannot be prior to the effective date of the existing competency. If the effective date of the competency being entered is prior to the effective Date of the competency that has already been entered, you will need to enter the new competency below the competency that already exists and adjust the effective dates of both competency entries **PRIOR** to saving the page.

3.5.1 Adding a Historical Dated Row Mid-Stack

1. Follow the instructions in section “[4.1. Locating the Member](#)” to search for the member’s record.
2. From the competency content section, select the competency record in which a historical dated row will be entered.

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| ▼ Competencies (Approval Not Required) | | | | | | |
|--|---|----------------|-------------------|-------------|--------------|--|
| ID | Competency | Effective Date | Evaluation Type | Proficiency | View History | |
| 2MINST | 2M Instructor/Recertifier | 01/30/2012 | Approved/Official | Good | | |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good | | |
| OODLT | 225 WLB U/W OOD | 01/30/2012 | Approved/Official | Good | | |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good | | |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good | | |

[+ Add New Competencies](#)

3. Click “View All” in the top right corner of the Details bar to view all current rows on the member’s record.

Person Profile

Update Competencies

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details [Find](#) [View All](#) First 1 of 2 Last

*Effective Date: 01/30/2012

Competency: OODLT 225 WLB U/W OOD

Evaluation Type: Approved/Official

*Status: Active

Rating Model: GOOD Good (Single Tier)

Proficiency: Good

Verified By: On the Job Training

Year Last Used: 2008

Year Acquired: 2008

Years Of Experience: [REDACTED]

The user will see all the effective dated rows for the competencies.

Person Profile

Update Competencies

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View 1 First 1-2 of 2 Last

| | | | | |
|----------------------|---------------------|--------------------|-----|-----|
| *Effective Date: | 01/30/2012 | [+] | [i] | [−] |
| Competency: | OODLT | 225 WLB U/W OOD | | |
| Evaluation Type: | Approved/Official | | | |
| *Status: | Active | | | |
| Rating Model: | GOOD | Good (Single Tier) | | |
| Proficiency: | Good | | | |
| Verified By: | On the Job Training | | | |
| Year Last Used: | 2008 | | | |
| Year Acquired: | 2008 | | | |
| Years Of Experience: | | | | |

| | | | | |
|----------------------|---------------------|--------------------|-----|-----|
| *Effective Date: | 06/20/2008 | [+] | [i] | [−] |
| Competency: | OODLT | 225 WLB U/W OOD | | |
| Evaluation Type: | Approved/Official | | | |
| *Status: | Active | | | |
| Rating Model: | GOOD | Good (Single Tier) | | |
| Proficiency: | Good | | | |
| Verified By: | On the Job Training | | | |
| Year Last Used: | 2008 | | | |
| Year Acquired: | 2008 | | | |
| Years Of Experience: | | | | |

- Click the  sign located on the most historically dated row. Using the example above the most historically dated row is: **06/20/2006**.
- A new competency record is created with the historical date populated in the Effective Date field. The Details box will display “1 of 3” in the upper right corner of the record. Any of the fields that were populated on the historical dated row will be brought forward and populated on the new row.

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Details Find | View 1 | First | **1-3 of 3** | Last

| | | | | | |
|-----------------------------|---------------------|--------------------|--|--|--|
| *Effective Date: | 01/30/2012 | | | | |
| Competency: | OODLT | 225 WLB UMW OOD | | | |
| Evaluation Type: | Approved/Official | | | | |
| *Status: | Active | | | | |
| Rating Model: | GOOD | Good (Single Tier) | | | |
| *Proficiency: | Good | | | | |
| Verified By: | On the Job Training | | | | |
| Year Last Used: | 2006 | | | | |
| Year Acquired: | 2006 | | | | |
| Years Of Experience: | | | | | |

| | | | | | |
|-----------------------------|---------------------|--------------------|--|--|--|
| *Effective Date: | 06/01/2011 | | | | |
| Competency: | OODLT | 225 WLB UMW OOD | | | |
| Evaluation Type: | Approved/Official | | | | |
| *Status: | Active | | | | |
| Rating Model: | GOOD | Good (Single Tier) | | | |
| *Proficiency: | Good | | | | |
| Verified By: | On the Job Training | | | | |
| Year Last Used: | 2006 | | | | |
| Year Acquired: | 2006 | | | | |
| Years Of Experience: | | | | | |

| | | | | | |
|-----------------------------|---------------------|--------------------|--|--|--|
| *Effective Date: | 06/20/2006 | | | | |
| Competency: | OODLT | 225 WLB UMW OOD | | | |
| Evaluation Type: | Approved/Official | | | | |
| *Status: | Active | | | | |
| Rating Model: | GOOD | Good (Single Tier) | | | |
| *Proficiency: | Good | | | | |
| Verified By: | On the Job Training | | | | |
| Year Last Used: | 2006 | | | | |
| Year Acquired: | 2006 | | | | |
| Years Of Experience: | | | | | |

6. Adjust the Effective Date of the new row to reflect the effective date of the competency. *Using the example provided below, the new effective date for the competency is:06/01/2011*
7. Complete the additional fields according to the instructions in section “[4.3. Adding a New Competency](#)”.
8. Click “OK” to return to the Person Profile page.
9. Click “Save” at the bottom of the Person Profile page to commit the changes.

3.5.2 Adding a Historical Dated Row End of Stack

Inserting a row end-stack is the process of adding a row **AT THE END** of one or multiple existing records. For example, if the user is entering a competency with a January 1, 2001 Effective Date and two competencies currently exist with the Effective Dates of June 1, 2003 and April 1, 2002 the user will be required to enter the January 2001 row **end-stack**.

Follow the following steps to enter a historical dated competency end-stack:

1. Follow the instructions in section “[4.1. Locating the Member](#)” to search for the member’s record.
2. From the competencies content section, select the competency to be updated or corrected. If the member has received the competency multiple times, be sure to select the correct competency record.

| Competencies (Approval Not Required) | | | | | | |
|--------------------------------------|---|----------------|-------------------|-------------|--------------|--|
| ID | Competency | Effective Date | Evaluation Type | Proficiency | View History | |
| 2MINST | 2M Instructor/Recertifier | 01/30/2012 | Approved/Official | Good | | |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good | | |
| OODLT | 225 WLB UMW OOD | 06/20/2011 | Approved/Official | Good | | |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good | | |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good | | |

The user will be directed to the “Update Competencies” page.

Competencies & Officer Specialty Codes (OCSs) User Guide

3. Click “View All” in the top right corner of the Details bar to view all current rows on the member’s record.

Person Profile

Update Competencies

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find **View All** First 1 of 2 Last

*Effective Date: 01/30/2012 + i -

Competency: 2MINST 2M Instructor/Recertifier

Evaluation Type: Approved/Official

*Status: Active ▼

Rating Model: GOOD Good (Single Tier)

Proficiency: Good ▼

Verified By: On the Job Training ▼

Year Last Used:

Year Acquired:

Years Of Experience:

- Click the  sign located on the most historically dated row. *Using the example above the most historically dated row is: 01/17/2011.*

Person Profile

Update Competencies

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View 1 First 1-2 of 2 Last

| | | |
|----------------------|---|---|
| *Effective Date: | 01/30/2012  |    |
| Competency: | 2MINST | 2M Instructor/Recertifier |
| Evaluation Type: | Approved/Official | |
| *Status: | Active  | |
| Rating Model: | GOOD | Good (Single Tier) |
| Proficiency: | Good  | |
| Verified By: | On the Job Training  | |
| Year Last Used: | <input type="text"/> | |
| Year Acquired: | <input type="text"/> | |
| Years Of Experience: | <input type="text"/> | |

| | | |
|----------------------|---|---|
| *Effective Date: | 01/17/2012  |    |
| Competency: | 2MINST | 2M Instructor/Recertifier |
| Evaluation Type: | Approved/Official | |
| *Status: | Active  | |
| Rating Model: | GOOD | Good (Single Tier) |
| Proficiency: | Good  | |
| Verified By: | On the Job Training  | |
| Year Last Used: | <input type="text"/> | |
| Year Acquired: | <input type="text"/> | |
| Years Of Experience: | <input type="text"/> | |

Note: In the image, a red box highlights the '01/17/2012' date field in the second row, and a red arrow points to the plus icon next to it.

- Adjust the competency Effective Date of the **LAST** row to reflect the date of the new competency being entered on the record. *Using the example provided below, the new effective date for the competency is: 01/04/2010*

Person Profile

Update Competencies

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View 1 First 1-3 of 3 Last

| | | |
|----------------------|---------------------|---------------------------|
| *Effective Date: | 01/30/2012 | |
| Competency: | 2MINST | 2M Instructor/Recertifier |
| Evaluation Type: | Approved/Official | |
| *Status: | Active | |
| Rating Model: | GOOD | Good (Single Tier) |
| Proficiency: | Good | |
| Verified By: | On the Job Training | |
| Year Last Used: | | |
| Year Acquired: | | |
| Years Of Experience: | | |
| *Effective Date: | 01/17/2012 | |
| Competency: | 2MINST | 2M Instructor/Recertifier |
| Evaluation Type: | Approved/Official | |
| *Status: | Active | |
| Rating Model: | GOOD | Good (Single Tier) |
| Proficiency: | Good | |
| Verified By: | On the Job Training | |
| Year Last Used: | | |
| Year Acquired: | | |
| Years Of Experience: | | |
| *Effective Date: | 01/04/2012 | |
| Competency: | 2MINST | 2M Instructor/Recertifier |
| Evaluation Type: | Approved/Official | |
| *Status: | Active | |
| Rating Model: | GOOD | Good (Single Tier) |
| Proficiency: | Good | |
| Verified By: | On the Job Training | |
| Year Last Used: | | |
| Year Acquired: | | |
| Years Of Experience: | | |

- Complete the additional fields according to the instructions in section [“4.3. Adding a New Competency”](#).

7. Click “OK” to return to the Person Profile page.
8. Click “Save” at the bottom of the Person Profile page to commit the changes.

4 Correcting a Competency Record

4.1 Correcting a Competency Code

If the competency code needs to be corrected, the user MUST first delete the competency record and re-enter it using the correct competency code. Follow the steps in section [6. Deleting a Competency](#) to delete a competency record.

4.2 Correcting other Competency Data

1. Follow the instructions in section “[4.1. Locating the Member](#)” to search for the member’s record.
2. From the competency content section, select the competency to be updated or corrected. If the member has received the competency multiple times, be sure to select the correct competency record.
3. Change/correct the appropriate fields.
4. Click “OK” to return to the Person Profile page.
5. Click “Save” at the bottom of the Person Profile page to commit the changes.

5 Deleting a Competency

As with any delete function, use extreme caution when performing delete transactions. It is possible to delete the wrong record or records, especially if the member has multiple instances of the same competency. If a record is erroneously deleted, it will have to be recreated.

Note: If this is a competency that has just been added, the “-“button used to delete some records will not appear until the user leaves the page and returns. The easiest resolution is to click “Return to Search” and then re-enter the member’s profile.

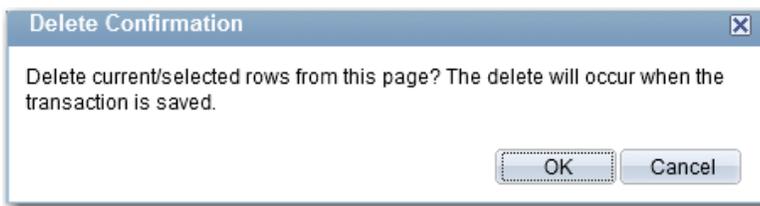
5.1 Deleting a Single Competency

1. Follow the instructions in section “[4.1. Locating the Member](#)” to search for the member’s record.
2. From the competency content section, select the competency to be deleted. If the member has received the competency multiple times, be sure to select the correct competency record.
3. To delete a competency that a member has received only once, click the trash can on the competency row

Competencies & Officer Specialty Codes (OCSs) User Guide

| Competencies (Approval Not Required) | | | | | | |
|--------------------------------------|---|-----------------|-------------------|-------------|--------------|--|
| ID | Competency | *Effective Date | Evaluation Type | Proficiency | View History | |
| 2MINST | 2M Instructor/Recertifier | 01/17/2012 | Approved/Official | Good | | |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good | | |
| OODLT | 225 WLB U/W OOD | 06/20/2011 | Approved/Official | Good | | |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good | | |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good | | |

- Click “OK” to confirm the deletion.



- Click “OK” to return to the Person Profile page.
- Click “Save” at the bottom of the Person Profile page to commit the changes.

5.2 Deleting One Competency where Multiple Instances Exist

- To delete one competency of multiple records of the same type, select the competency.

| Competencies (Approval Not Required) | | | | | | |
|--------------------------------------|---|-----------------|-------------------|-------------|--------------|--|
| ID | Competency | *Effective Date | Evaluation Type | Proficiency | View History | |
| 2MINST | 2M Instructor/Recertifier | 01/17/2012 | Approved/Official | Good | | |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good | | |
| OODLT | 225 WLB U/W OOD | 06/20/2011 | Approved/Official | Good | | |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good | | |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good | | |

| Person Profile | | | | | |
|--------------------------------------|---------------------------------|-------|-------------------|--------------|--|
| View Historical Items | | | | | |
| Competencies (Approval Not Required) | | | | | |
| Effective Date | Competency | ID | *Evaluation Type | *Proficiency | |
| 01/30/2012 | 225 WLB U/W OOD | OODLT | Approved/Official | Good | |
| 06/20/2011 | 225 WLB U/W OOD | OODLT | Approved/Official | Good | |
| 06/20/2006 | 225 WLB U/W OOD | OODLT | Approved/Official | Good | |

Competencies & Officer Specialty Codes (OCSs) User Guide

2. Scroll through the records using the 1) Arrows or 2) Click on “View All” to find the correct record to delete.

Person Profile
Update Competencies

Empl ID: [REDACTED] [REDACTED]
Profile Type: PERSON Person
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find View All First 1 of 3 Last

*Effective Date: 01/30/2012
Competency: OODLT 225 WLB U/W OOD
Evaluation Type: Approved/Official
*Status: Active
Rating Model: GOOD Good (Single Tier)
Proficiency: Good
Verified By: On the Job Training
Year Last Used: [REDACTED]
Year Acquired: [REDACTED]
Years Of Experience: [REDACTED]

3. Once the correct record has been located, click the “-“button in the upper right-hand corner of the record.

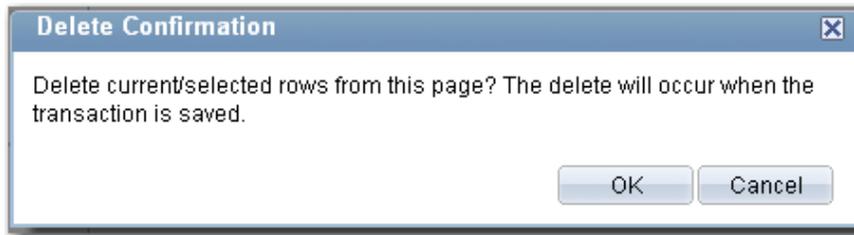
Person Profile
Update Competencies

Empl ID: [REDACTED] [REDACTED]
Profile Type: PERSON Person
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find View All First 1 of 3 Last

*Effective Date: 01/30/2012
Competency: OODLT 225 WLB U/W OOD
Evaluation Type: Approved/Official
*Status: Active
Rating Model: GOOD Good (Single Tier)
Proficiency: Good
Verified By: On the Job Training
Year Last Used: [REDACTED]
Year Acquired: [REDACTED]
Years Of Experience: [REDACTED]

4. Click “OK” to confirm the deletion



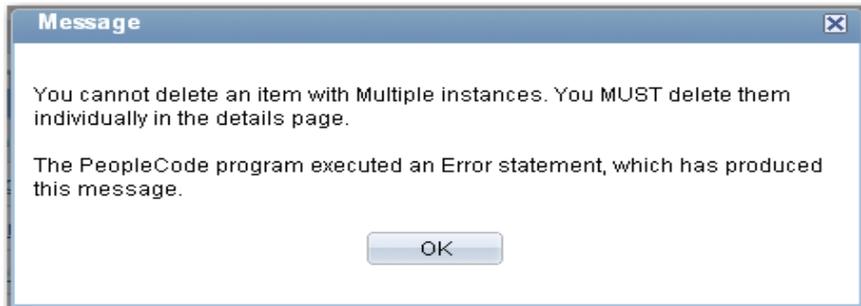
5. Click “OK” to return to the Person Profile page.
6. Click “Save” at the bottom of the Person Profile page to commit the changes.

5.3 Deleting All Records for a Competency

This process is the same as deleting only one instance of a competency code. Each record must be deleted individually using the steps outlined in section [“6.2. Deleting One Competency where Multiple Instances Exist”](#).

To prevent unintentional deletions of competencies, the **trash can** functionality for multiple competencies of one type has been disabled.

The following message will appear if you attempt to delete multiple competencies at one time:



6 Officer Specialty Codes (OSCs)

This section provides the procedure required for entering or updating a member’s Officer Specialty Codes (OSCs). Only Authorized users will be able to update an OSC on a member’s record.

Note: Officer Specialty Codes (OSCs) content section has the same functionality as the Competencies content section. User should follow the same steps to enter, update and/or delete an OSC for a member.

6.1 Entering an Officer Specialty Codes (OSCs)

Navigate to the following page in Direct Access to enter an OSC for a member:

Portal Link: Person Profile

Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Direct Access also remembers recently used pages. If you have used the Person Profile page recently, you can go to Favorites > Recently Used > Person Profiles

Person Profile

Empl ID: [REDACTED] [View Profile](#)

Profile Type: PERSON Person

*Profile Status: Active

*Description: [REDACTED]

Profile Actions: <Select Action>   

You have successfully saved those profile changes that do not require approval.

Competencies **Qualifications** Education

▼ **Competencies (Approval Not Required)** Customize | Find | View All | First 1-5 of 6 Last

| ID | Competency | *Effective Date | Evaluation Type | Proficiency | View History |
|---------|---|-----------------|-------------------|-------------|---|
| 2MINST | 2M Instructor/Recertifier | 01/30/2012 | Approved/Official | Good |   |
| ANT-GPD | Antenna/Ground Plane Design | 04/30/2011 | Approved/Official | Good |  |
| OODLT | 225 WLB UWV OOD | 01/30/2012 | Approved/Official | Good |   |
| ORANLST | Operations Research Analyst | 05/22/2004 | Approved/Official | Good |  |
| QMOW | Quartermaster of the Watch | 02/02/2009 | Approved/Official | Good |   |

[+ Add New Competencies](#)

▼ **Officer Specialty Code (Approval Not Required)** Customize | Find | View All | First 1-2 of 2 Last

| ID | Competency | *Effective Date | Evaluation Type | Proficiency |
|----------|---|-----------------|-------------------|-------------|
| CG-AV12 | Aviation Safety (OSC) | 01/09/2012 | Approved/Official | Good |
| CG-OAP10 | Ops Ashore-Prevention (OSC) | 01/17/2012 | Approved/Official | Good |

[+ Add New Officer Specialty Code](#)

Competencies **Qualifications** Education

1. Officer Specialty Codes are located under the Competencies tab
2. Officer Specialty Codes content section to view, add and update a member's OSC information
3. Click "Add New Officer Specialty Code" to add a new OSC for a member

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UNITED STATES COAST GUARD



Person Profile

Honors/Awards or Competency Mass Update

4/18/2012

**Prepared by
Commanding Officer (P&D)
U.S. Coast Guard Pay & Personnel Center
444 SE Quincy St
Topeka, KS 66683-3591**

Step by step instructions performing a Mass Update of member Competencies or Awards in DA

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| Manage Mass Update—Validate the Data | 5 |
| Executing the Mass Update—Committing the Data Change | 7 |

Process Overview

Introduction This section provides the process and procedure for entering award or competency data for a large group of members (25 or more) who are authorized the same honor, award or competency on the same date.

Effective Date This mass update process is effective on 30 April 2012.

Multiple Awards or Competency Data Entry/Mass Update Under this process, the SPO will review proposed data changes and will perform the steps to execute the update. The data changes will be *staged* in the system by PPC based on the honor/award /competency roster submitted by the SPO.

The table on the following provides an overview of the mass update process:

Continued on next page

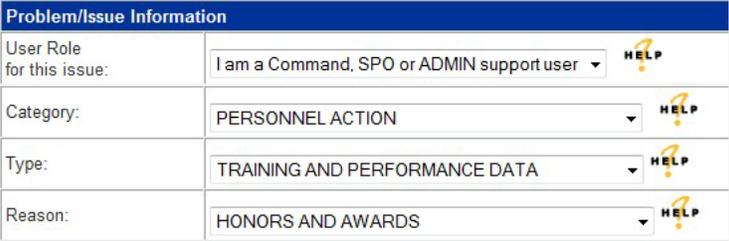
Process Overview, Continued

Multiple Awards or Competency Data Entry/Mass Update (**continued**)

| Stage | Who does it | What happens |
|-------|-------------|--|
| 1 | SPO | Prepares a roster of personnel authorized the honor/award or competency. The roster shall be in Microsoft Excel (spreadsheet) file format and include, at a minimum, the employee IDs (The employee IDs must appear in a single column and must be the first column in the spreadsheet) and names of personnel authorized the award or competency. |
| 2 | | <p>Transmits the following to PPC Customer Care via trouble ticket (http://cgweb.ppc.uscg.mil/ccb/):</p> <ol style="list-style-type: none"> 1. The roster (spreadsheet prepared in stage 1 above) and the data for the entry (2.A – Honor/Award or 2.B – Competency) 2. A. Data for the award entry: <ol style="list-style-type: none"> (a) Honor/Award (Required) – Provide the award code and title of the honor or award (A listing of award codes is available at http://www.uscg.mil/ppc/da/awards.xls). Example – <i>CGMA/CG Unit Commendation Ribbon</i> (b) Issue Date (Required): Provide the date the award was granted . (c) From Date (Optional): If the award is for a specific period of time, provide the beginning date for that time frame. If the From Date is provided, the To Date must be provided as well. (d) To Date (Optional): If the award is for a specific period of time, provide the ending date for that time frame. (e) Grantor (Optional): The agency or organization granting the award. 2.B. Data for a competency entry: <ol style="list-style-type: none"> (a) Competency Code (Required) – Provide the competency code and title as listed in the Competency Dictionary (http://www.uscg.mil/ppc/da/CompetencyDictionary.xls) (b) Effective Date (Required) (c) Proficiency (Required) – Normally the default “3-Good” is used. Other options, as listed on the <i>Add New Competencies</i> screen for an individual are also valid. (d) Verified by (Required) – Normally the default “On the Job Training” is used”. Other options, as listed on the <i>Add New Competencies</i> screen for an individual are also valid. |

Continued on next page

Multiple Awards or Competency Data Entry/Mass Update (**continued**)

| Stage | Who does it | What happens |
|--------------|--|--|
| 2 | SPO | <p>Complete the Problem/Issue Information section of the trouble ticket as shown below:</p>  <p>Note: For the “Reason” line, select “HONORS AND AWARDS” or “COMPETENCIES” as appropriate. Follow the instructions at http://cgweb.ppc.uscg.mil/ccb/attachment.asp#guide to attach the spreadsheet to the trouble ticket.</p> |
| 3 | PPC | Defines and creates a unique Mass Update ID (the HEAT ticket number without any leading zeros) for the requester using the data provided. |
| 4 | | Notifies the SPO point of contact when the Mass Update is ready for review and execution. |
| 5 | SPO Data Entry Technician (CGHRS Role User) | Reviews the mass update and forwards to the SPO Supervisor/Auditor (CGHRSUP Role User) when ready. (See <i>Manage Mass Update—Validate the Data on page 4.</i>) |
| 6 | SPO Supervisor/Auditor | Executes the mass update when ready. (See <i>Executing the Mass Update—Committing the Data Change on page 6</i>) |

Manage Mass Update—Validate the Data

Introduction Managing the mass update allows a user to validate the transactions prior to applying them. Individual EMPLIDs can be removed or double-checked to ensure that the proper information is being updated.

Navigation **Portal Link:** Manage Mass Update

Menu Path: Main Menu > Workforce Administration > Collective Processes > Mass Update > Manage Mass Update

Procedure Follow the steps to manage the mass update:

1. Use the magnifying glass to search for the correct mass update ID (*The Mass Update ID is the PPC Customer Care (HEAT) Ticket Number without any leading zeros prefixed with “CGAWD” (for Awards) or “CGCOMP” (for Competency) (e.g. The Mass Update ID for PPC Customer Care Ticket #01177108, Award Mass Update is is CGAWD1177108).*)

Manage Mass Updates

Running Instances

Search Criteria

Mass Update ID: Test mass update for user Initiated
guide

Section:

Element:

Empl ID:

Transaction Status:

2. Click "Search."
3. Validate the results.

Manage Mass Updates

Running Instances

Search Criteria

Mass Update ID: Test mass update for user Initiated
guide

Section:

Element:

Empl ID:

Transaction Status:

Total Transactions per Status

1 to 1 on 1

| Mass Update | Person ID | Empl Record | Name | Transaction Status | Details | Execute |
|----------------|-----------|-------------|------|--------------------|---------|--|
| CMS USER GUIDE | | | | Ready | | <input type="button" value="Execute"/> |

Continued on next page

Manage Mass Update—Validate the Data, Continued

Procedure (Cont'd)

4. To see the status of each EMPLID, check the “Transaction Status” field.
 - a. An EMPLID that is ready to be executed will show “Ready.”
 - b. An EMPLID that has been executed without error will show “Success.”
 - c. An EMPLID that encountered an error during execution will show “Failure.”
 - d. Setting an EMPLID to “Cancel” will remove them from the mass update when it is executed. This can be used to remove EMPLIDs that should not be included in the mass update.
 - e. The “Warning” status indicates that there is a potential problem with the EMPLID’s set up. Click the “Details” icon to check the warning messages.
 5. Remove any individuals that need to be removed by clicking the “-“ button on the row to be removed or by setting the EMPLID’s Transaction Status to “Cancel.”.
 6. Save.
 7. CG SPOs will notify the SPO manager that the mass update is ready for execution (see the next section). Note: The Notify button at the bottom of the screen can be used to create and send an email to the SPO manager if desired.
-

Executing the Mass Update—Committing the Data Change

Introduction There are two ways to execute a mass update. Each EMPLID can be executed from the Manage Mass Updates page or all EMPLIDs can be executed from the Execute Mass Update page.

Executing from Manage Mass Updates Follow these steps to execute the mass update from Manage Mass Updates page:

1. Verify that the Transaction Status for each EMPLID is set to “Ready.” (see previous section).



| Mass Update | Person ID | Empl Record | Name | *Transaction Status | Details | Execute |
|----------------|-----------|-------------|------|---------------------|---------|---------|
| CMS_USER GUIDE | | 0 | | Ready | | Execute |

2. Click the “Execute” button.
 3. Repeat for each EMPLID.
-

Executing from Execute Mass Update SPO supervisors should review the Mass Update from the Manage Mass Update page as described above prior to executing the mass update.

Navigation **Portal Link:** Execute Mass Update

Menu Path: Main Menu > Workforce Administration > Collective Processes > Mass Update > Execute Mass Update

Procedure Follow these steps to execute the mass update using the Execute Mass Update page:

1. Create a new Run Control ID by clicking on the Add a New Value tab. (Note: You can reuse Run Control ID’s. If you’ve used this process before, just open the ID you created and update the Mass Update ID field to match the ID provided by PPC for this update).
-

Continued on next page

Executing the Mass Update—Committing the Data Change, Continued

Procedure (Cont'd)

(Creating a new run control ID)

Execute Mass Updates

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Maximum number of rows to return (up to 300):

Run Control ID: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

(The Add a New Value page)

Find an Existing Value **Add a New Value**

Run Control ID:

Add

Find an Existing Value | Add a New Value

2. If creating a new Run Control ID, enter a name for the Run Control ID (use your initials for example) and click the Add button.
3. Enter the Mass Update ID (*The Mass Update ID is the PPC Customer Care (HEAT) Ticket Number without any leading zeros prefixed with “CGAWD” or “CGCOMP” (e.g. The Mass Update ID for PPC Customer Care Ticket #01177108 is CGAWD1177108)*), or if using an existing Run Control ID, verify that the correct Mass Update ID is displayed.

Execute Mass Updates

Run Control ID: cms9 [Report Manager](#) [Process Monitor](#) **Run**

| Seq | Mass Update ID | Description | Mass Update Status |
|-----|----------------|---------------------------------|--------------------|
| 1 | CMS USER GUIDE | Test mass update for user guide | Initiated |

Parallel Processing

Run Instances in Parallel Maximum of Instances: Transactions per Instance:

Save Return to Search Notify Add Update/Display

4. Click the “Run” button.

Continued on next page

Executing the Mass Update—Committing the Data Change, Continued

Procedure (cont'd)

5. Set the server to "PSUNX."

The screenshot shows a 'Process Scheduler Request' dialog box. At the top, it displays 'User ID: 68746' and 'Run Control ID: cms9'. Below this, there are fields for 'Server Name' (set to 'PSUNX'), 'Run Date' (05/27/2011), 'Recurrence' (empty), and 'Run Time' (12:08:00PM). A 'Reset to Current Date/Time' button is next to the Run Time field. Below these fields is a 'Time Zone' field with a search icon. The main part of the dialog is a table titled 'Process List' with columns: 'Select', 'Description', 'Process Name', 'Process Type', 'Type', 'Format', and 'Distribution'. The table contains one row: a checked checkbox, 'Mass Update', 'HR_MASS_UPD', 'Application Engine', 'Web', 'TXT', and 'Distribution'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

6. Ensure that the mass update intended to be run is checked.
7. Click "OK."
8. Go to the Process Monitor.
9. Refresh periodically until the process shows that it successfully completed.

After the mass update is executed, you can verify that the data populated correctly by looking at a member's Person Profile.

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UNITED STATES COAST GUARD



Person Profiles

Education

03/5/2012

Prepared by
Commandant (CG-631)
U.S. Coast Guard
1900 Half Street, SW
Washington, DC 20593-0001

Step-by step instructions on adding, updating and deleting Education data in Direct Access.

Encl (3)

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1 Introduction

Individual USCG education (degree) information is maintained in the Person Profile of Direct Access. Authorized users enter and maintain this information. The information is available to USCG members via self-service. This section provides the procedure for adding, updating, and deleting Education via the Person Profile page.

2 Portal Navigation

The user can navigate to the Person Profiles page using the path below. At any time, if a user needs to return to the home screen, the user can click the “Home” link in the upper right-hand corner of the window.

Enterprise Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Education: This navigation takes the user to the Person Profile screen. Education is recorded on the Person Profile screen.

3 Wildcard Search

Direct Access supports the use of three wildcard features when searching for data. The wildcards can be helpful in finding the exact information that user wants to process. The following are the supported standard wildcard features.

| Character | Function |
|------------------|--|
| % (percent sign) | Match one or more characters. |
| _ (underscore) | Match any single character. |
| \ (back slash) | Escape character – don’t treat the next character as a wildcard. |

When attempting to search for a member, you may use the “wildcard” search feature. One commonly used wildcard is the “_” sign. The use of this sign represents a single letter instead of a group of letters. For example, if you would like to see all the members whose last names contain the letters “C”, “H” and “N”, in that order, the “_” wildcard would be used to represent a single letter between the characters in which it is placed. An example of the search results when a “_” is used is located below.

The screenshot shows a search interface with the following elements:

- Buttons: "Find an Existing Value" (selected), "Add a New Value"
- Maximum number of rows to return (up to 300): 300
- Search Criteria:
 - Empl ID: begins with []
 - Profile Type: begins with []
 - Name: begins with []
 - Last Name: begins with [CH_N]
 - Alternate Character Name: begins with []
- Options: Include History, Correct History, Case Sensitive
- Buttons: Search, Clear, Basic Search, Save Search Criteria
- Search Results:
 - Message: Only the first 300 results of a possible 489 can be displayed. Enter more search key information and search again to re
 - View All, First, 101-200 of 300, Last
 - Table with columns: Empl ID, Profile Type, Name, Last Name, Alternate Character Name

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|-------------|--------------------------|
| | AWARDS COORD | | CHANDLER | (blank) |
| | PERSON | | CHANDLER | (blank) |
| | PERSON | | CHANDRASENA | (blank) |
| | PERSON | | CHANES | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |

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Another wildcard that is commonly used is the “%” sign. This wildcard is used to represent multiple characters. For example, if you would like to see all members whose last names contain the letters “C”, “H” and “N”, regardless of the order of the letters in the name, the “%” wildcard should be used. Below is an illustration of this example.

The screenshot shows a search interface with two tabs: "Find an Existing Value" (selected) and "Add a New Value". Below the tabs, there is a text input field for "Maximum number of rows to return (up to 300):" with the value "300". The search criteria are as follows:

- Empl ID:** begins with []
- Profile Type:** begins with []
- Name:** begins with []
- Last Name:** begins with CH%N
- Alternate Character Name:** begins with []

There are three checkboxes: Include History, Correct History, and Case Sensitive. Below the search criteria are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

Search Results

Only the first 300 results of a possible 1459 can be displayed. Enter more search key information and see [View All](#) First 1-100 of 300 Last

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|------------|--------------------------|
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | RETIREE | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | AWARDS COORD | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHADBAND | (blank) |
| | PERSON | | CHADBOURNE | (blank) |

4 Entering a Degree

When information about a member’s Education is received and ready to be entered into Direct Access, navigate to the following page:

Portal Link: Person Profile

Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

4.1 Locating a Member

1. Use the Search record to pull up the member’s Person Profile using the member’s EMPLID or name.

HINT: When attempting to search for a member, you may use the Direct Access “wildcard” search feature. Refer to section “[3. Wildcard Search](#)” for more information.

Person Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Maximum number of rows to return (up to 300):

Empl ID: begins with

Profile Type: begins with

Name: begins with

Last Name: begins with

Alternate Character Name: begins with

Include History Correct History Case Sensitive

 [Basic Search](#) [Save Search Criteria](#)

2. Click the Search button. If the search returns more than one record, be sure to select the correct member’s record that has “PERSON” in the Profile Type column.



Note: If a member has both a Person Profile and an Awards Coordinator Profile, then that member is a PHS officer who is or has been assigned to the Coast Guard for duty. Use the “PERSON” profile to record the data.

4.2 Viewing Degrees

1. Click the Education tab.

Person Profile

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

*Profile Status: Active

*Description: [REDACTED]

Profile Actions: <Select Action>   

Competencies [Qualifications](#) **Education**

| Competencies (Approval Not Required) | | | | | | Customize | Find | View All | Print | Grid | First | 1-5 of 6 | Last |
|--------------------------------------|------------|-----------------|-------------------|-------------|---|-----------|------|----------|-------|------|-------|----------|--|
| ID | Competency | *Effective Date | Evaluation Type | Proficiency | View History | | | | | | | | |
| [REDACTED] | [REDACTED] | 01/30/2012 | Approved/Official | Good |  | | | | | | | |  |
| [REDACTED] | [REDACTED] | 04/30/2011 | Approved/Official | Good | | | | | | | | |  |
| [REDACTED] | [REDACTED] | 07/27/2009 | Approved/Official | Tier 1 | | | | | | | | |  |
| [REDACTED] | [REDACTED] | 01/30/2012 | Approved/Official | Good |  | | | | | | | |  |
| [REDACTED] | [REDACTED] | 05/22/2004 | Approved/Official | Good | | | | | | | | |  |

[+ Add New Competencies](#)

A list of the member's current Degrees will be displayed in the Education content section.

Person Profile

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

*Profile Status: Active

*Description: [REDACTED]

Profile Actions: <Select Action>   

[Competencies](#) [Qualifications](#) **Education**

| Degrees (Approval Not Required) | | | | Customize | Find | View All | Print | Grid | First | 1-2 of 2 | Last |
|---------------------------------|---|-------------|-------------------------------------|-----------|------|----------|-------|------|-------|----------|---|
| ID | Degree | Major Code | Qualifying | | | | | | | | |
| B | College Graduate | Biology | <input checked="" type="checkbox"/> | | | | | | | |  |
| MSPH | Master of Public Health | PUBLIC HLTH | <input type="checkbox"/> | | | | | | | |  |

[+ Add New Degrees](#)

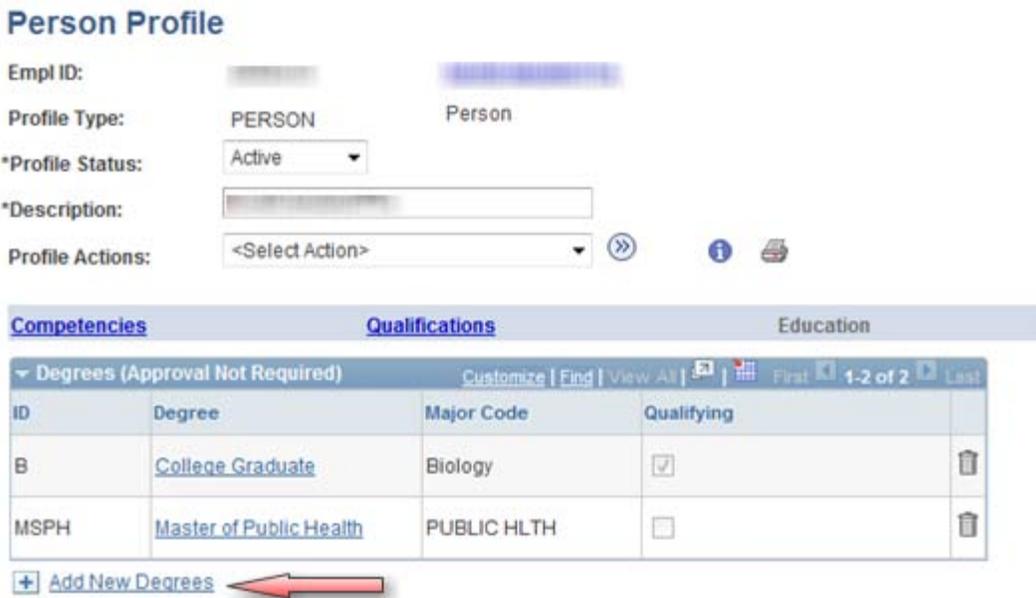
2. If a member has more than five degrees, only the first five will be displayed. Click on the View All link to display all of the member's degrees. Check to see if the degree, with a different effective date, has previously been entered on the member's record.

3. If the degree is new, proceed to section “[4.3. Adding a New Degree](#)”. If the degree currently exists, proceed to section “[4.4. Adding a Previously Granted Degree of the Same Type](#)”. To add a historical dated degree, proceed to section “[4.5. Adding a Historical Dated Degree of the Same Type](#)”.

4.3 Adding a New Degree

Follow the steps below to add a new degree to a member’s profile.

1. To add a new degree, click on the “Add New Degrees” link located below the Education content section.



2. On the Add New Degrees page, enter the following fields:

| Field | Description/Instructions |
|---------------------------|--|
| *Date Acquired (Required) | Enter the date the Degree was issued. Also known as the Effective Date . Click on the icon to choose a date. |
| *Degree (Required) | Enter the Degree or select it from a listing that will be displayed by clicking and performing a Lookup in the Degree Table search box. A single click on any column in that row will take you back to the Degree page with the Degree field populated. |
| Major Code (See sidebar) | Enter the Major or select it from a listing that will be displayed by clicking and performing a Lookup in the Major Table search box. |
| *Status (Required) | Leave as Active |
| Country | If not USA, click the and enter search criteria in the Lookup Country search dialog box. Valid values are pre-defined in the Table. |

The Major Code field is not marked as a required field in the system. However, if the Major Code is left blank the member's degree information will not be displayed in the CG Business Intelligence (CGBI) Officer or Employee Summary Sheet.

| Field | Description/Instructions |
|---|--|
| State | Enter the State abbreviation or click the  to display the Lookup State Table. Enter partial search criteria. Click Search to display possible matches. A single click on any column in that row retrieves the page. |
| School Code | Enter the School Code or select it from a listing that will be displayed by clicking  and performing a Lookup in the School Table search box. |
| Minor Code | If applicable, enter the Minor or select it from a listing that will be displayed by clicking  and performing a Lookup in the Minor Table search box. |
| Average Grade | Enter the Grade Point Average (optional, this field may be left blank if the average grade in not provided on the documentation provided). |
| Graduated Checkbox | Click this checkbox on to show the employee has graduated. |
| Terminal Degree for Discipline Checkbox | N/A. Do not select. |
| Qualifying | N/A. Do not select. |
| Accredited Checkbox | N/A. Do not select. |
| Educator | N/A. Do not use. |
| OK | Click OK to Save the page. NOTE: The entry will not be saved to the Person Profile until you click SAVE at bottom of the Person Profile page |

For fields that have the ‘Lookup’ icon next to it, you may narrow the search by clicking on the icon and entering a value in one or many of the search fields on the Lookup page.

- a. **Content Item ID:** Enter all or part of the degree code
- b. **Content Group Type:** N/A
- c. **Content Group:** N/A
- d. **Description:** Enter all or part of the title of the degree

After you click OK, you will be returned to the Person Profile page. The new degree will be displayed in the summary grid.

- 3. Click the Save button located at the bottom of the Person Profile page to commit the entry.

NOTE: If the wrong degree was selected, delete it and repeat Step 4.3.

- 4. Click on “Return to Search” to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.4 Adding a Previously Granted Degree of the Same Type

Follow the steps below to add a new row to a Degree Code that currently exists in the member’s profile.

NOTE: The system allows a degree with different effective dates to be entered on a member’s record multiple times. Adding a new effective dated row involves adding a new row to the education data history.

1. Click the Education tab. A list of the member’s current degrees will display under the Degrees content section

Person Profile

Empl ID: [View Profile](#)

Profile Type: PERSON Person

*Profile Status: Active

*Description:

Profile Actions:   

| Competencies | | Qualifications | | Education | |
|---|---|----------------|-------------------------------------|---|--|
| ▼ Degrees (Approval Not Required) Customize Find View All   First 1-2 of 2 Last | | | | | |
| ID | Degree | Major Code | Qualifying | | |
| B | College Graduate | Biology | <input checked="" type="checkbox"/> |  | |
| MSPH | Master of Public Health | PUBLIC HLTH | <input type="checkbox"/> |  | |
| + Add New Degrees | | | | | |

2. In the Degree column, click on the existing degree record.

| Competencies | | Qualifications | | Education | |
|---|---|----------------|-------------------------------------|---|--|
| ▼ Degrees (Approval Not Required) Customize Find View All   First 1-2 of 2 Last | | | | | |
| ID | Degree | Major Code | Qualifying | | |
| B | College Graduate | Biology | <input checked="" type="checkbox"/> |  | |
| MSPH | Master of Public Health | PUBLIC HLTH | <input type="checkbox"/> |  | |

The user will be directed to the “Update Degrees” page.

Person Profile

Add New Degrees

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Add item details. Select OK to apply changes and return. Select Cancel to return. Select Apply and Add to continue adding additional items.

Details Find | View All First 1 of 1 Last

***Date Acquired:** 05/16/1998 [calendar icon] [info icon]

***Degree:** B [magnifying glass icon] Bachelors Degree

Major Code: 750 [magnifying glass icon] BIOLOGY, GENERAL

***Status:** Active [dropdown arrow]

Country: USA [magnifying glass icon] United States

State: CT Connecticut

School Code: 129020 [magnifying glass icon] UNIVERSITY OF CONNECTICUT

Minor Code: [magnifying glass icon]

Average Grade: [input field]

Graduated

Terminal Degree for Discipline

Qualifying

Accredited

Educator: [input field] [save icon]

IMPORTANT: The system does not allow the entry of duplicate entries in a member’s profile. If you enter a membership with a Date Acquired date that already exists in the member’s profile, you will receive an error message. You must indicate a different date to resolve the error.

3. Click on the  sign in the top right corner of the Detail box to insert a new effective dated row.

Person Profile

Add New Degrees

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Add item details. Select OK to apply changes and return. Select Cancel to return. Select Apply and Add to continue adding additional items.

Details Find | View All First 1 of 1 Last

| | | | |
|------------------------|--|---|---|
| *Date Acquired: | <input type="text" value="05/16/1998"/> |  |   |
| *Degree: | <input type="text" value="B"/> |  | Bachelors Degree |
| Major Code: | <input type="text" value="750"/> |  | BIOLOGY, GENERAL |
| *Status: | <input type="text" value="Active"/> |  | |
| Country: | <input type="text" value="USA"/> |  | United States |
| State: | <input type="text" value="CT"/> | | Connecticut |
| School Code: | <input type="text" value="129020"/> |  | UNIVERSITY OF CONNECTICUT |
| Minor Code: | <input type="text"/> |  | |
| Average Grade: | <input type="text"/> | | |
| | <input checked="" type="checkbox"/> Graduated | | |
| | <input type="checkbox"/> Terminal Degree for Discipline | | |
| | <input type="checkbox"/> Qualifying | | |
| | <input type="checkbox"/> Accredited | | |
| Educator: | <input type="text"/> |  | |

4. A new degree record is created with the current date populated in the Date Acquired field. The Details box will display “1 of 2” in the upper right corner of the record. Any fields that were populated on the previous degree row will be brought forward and populated on the new row.

Details Find | " " | 1 of 2 Last

*Date Acquired: 01/25/2012

Degree: B Bachelors Degree

Major Code: 750 BIOLOGY, GENERAL

*Status: Active

Country: USA United States

State: CT Connecticut

School Code: 129020 UNIVERSITY OF CONNECTICUT

Minor Code:

Average Grade:

Graduated

Terminal Degree for Discipline

Qualifying

Accredited

Educator:

5. Complete the fields (if necessary) as indicated in section “[4.3. Adding a New Degree](#)”
6. Click OK to return to the Person Profile page. Upon returning to the Person Profile page, the multiple records icon  will be displayed on the row for the newly added degree.

| Degrees (Approval Not Required) | | | | | |
|---------------------------------|---|-------------|-------------------------------------|---|---|
| ID | Degree | Major Code | Qualifying | View History | |
| B | College Graduate | Biology | <input checked="" type="checkbox"/> |  |  |
| MSPH | Master of Public Health | PUBLIC HLTH | <input type="checkbox"/> | |  |

7. Click the Save button located at the bottom of the Person Profile page to commit the entry.
8. Click on “Return to Search” to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.5 Adding a Historical Dated Degree of the Same Type

The Effective Date of the degree being entered cannot be prior to the Effective Date of the existing degree. If the Effective Date of the degree being entered is prior to the Effective Date of the degree that has already been entered, you will need to enter the new row below the degree that already exists and adjust the Effective Dates of both degree entries **PRIOR** to saving the page.

4.5.1 Adding a Historical Dated Row Mid-Stack

Inserting a row mid-stack is the process of adding a row **BETWEEN** two existing records. For example, if the user is entering a degree with a July 1, 2008 Effective Date and two degrees currently exist with the Effective Dates of June 1, 2009 and August 1, 2007, the user will be required to enter the July 2008 row **mid-stack**.

Follow the following steps to enter a historical dated degree mid-stack:

1. Follow the instructions in section “[4.1. Locating a Member](#)” to search for the member’s record.
2. Click the Education tab. A list of the member’s current degrees will display under the Degrees content section
3. In the Degree column, click on the existing degree record in which a historical dated row will be entered.

| ID | Degree | Major Code | Qualifying | View History |
|------|---|------------------|-------------------------------------|--------------|
| B | Bachelors Degree | BIOLOGY, GENERAL | <input checked="" type="checkbox"/> | |
| MSPH | Master of Public Health | PUBLIC HEALTH | <input type="checkbox"/> | |

The user will be directed to the “Update Degrees” page.

4. Click “View All” in the top right corner of the Details bar to view all current rows on the member’s record.

Person Profile

Update Degrees

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details View All First 1 of 2 Last

***Date Acquired:** 06/1/2009 

Degree: MSPH Master of Public Health

Major Code: 1351 PUBLIC HEALTH

***Status:** Active 

Country: USA  United States

State: FL  Florida

School Code: 137351  UNIVERSITY OF SOUTH FLORIDA

Minor Code: 

Average Grade:

Graduated

Terminal Degree for Discipline

Qualifying

Accredited

Educator: Master of Public Health Practice 

5. Click the  sign located on the most historically dated row. *Using the example above the most historically dated row is: August 1, 2007.*

Details Find | View 1 | First 1-2 of 2 | Last

| | | |
|------------------------|---|---|
| *Date Acquired: | 06/01/2009  |    |
| Degree: | MSPH | Master of Public Health |
| Major Code: | 1351 | PUBLIC HEALTH |
| *Status: | Active  | |
| Country: | USA  | United States |
| State: | FL | Florida |
| School Code: | 137351  | UNIVERSITY OF SOUTH FLORIDA |
| Minor Code: | <input type="text"/>  | |
| Average Grade: | <input type="text"/> | |
| | <input checked="" type="checkbox"/> Graduated | |
| | <input type="checkbox"/> Terminal Degree for Discipline | |
| | <input type="checkbox"/> Qualifying | |
| | <input type="checkbox"/> Accredited | |
| Educator: | Master of Public Health Practice  | |

| | | |
|------------------------|--|---|
| *Date Acquired: | 08/01/2007  |    |
| Degree: | MSPH | Master of Public Health |
| Major Code: | 1351 | PUBLIC HEALTH |
| *Status: | Active  | |
| Country: | USA  | United States |
| State: | FL | Florida |
| School Code: | 137351  | UNIVERSITY OF SOUTH FLORIDA |
| Minor Code: | <input type="text"/>  | |
| Average Grade: | <input type="text"/> | |
| | <input checked="" type="checkbox"/> Graduated | |
| | <input type="checkbox"/> Terminal Degree for Discipline | |
| | <input type="checkbox"/> Qualifying | |
| | <input type="checkbox"/> Accredited | |
| Educator: | Master of Public Health Practice  | |

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- A new degree record is created with the historical date populated in the Date Acquired field. The Details box will display “1 of 3” in the upper right corner of the record. Any of the fields that were populated on the historical dated row will be brought forward and populated on the new row.

Details Find | View 1 | First | 1-3 of 3 | Last

| | | | | |
|-----------------|---|-----------------------------|--|--|
| *Date Acquired: | 06/01/2009 | | | |
| Degree: | MSPH | Master of Public Health | | |
| Major Code: | 1351 | PUBLIC HEALTH | | |
| *Status: | Active | | | |
| Country: | USA | United States | | |
| State: | FL | Florida | | |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA | | |
| Minor Code: | | | | |
| Average Grade: | | | | |
| | <input checked="" type="checkbox"/> Graduated | | | |
| | <input type="checkbox"/> Terminal Degree for Discipline | | | |
| | <input type="checkbox"/> Qualifying | | | |
| | <input type="checkbox"/> Accredited | | | |
| Educator: | Master of Public Health Practice | | | |

| | | | | |
|-----------------|---|-----------------------------|--|--|
| *Date Acquired: | 08/01/2007 | | | |
| Degree: | MSPH | Master of Public Health | | |
| Major Code: | 1351 | PUBLIC HEALTH | | |
| *Status: | Active | | | |
| Country: | USA | United States | | |
| State: | FL | Florida | | |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA | | |
| Minor Code: | | | | |
| Average Grade: | | | | |
| | <input checked="" type="checkbox"/> Graduated | | | |
| | <input type="checkbox"/> Terminal Degree for Discipline | | | |
| | <input type="checkbox"/> Qualifying | | | |
| | <input type="checkbox"/> Accredited | | | |
| Educator: | Master of Public Health Practice | | | |

| | | | | |
|-----------------|---|-----------------------------|--|--|
| *Date Acquired: | 08/01/2007 | | | |
| Degree: | MSPH | Master of Public Health | | |
| Major Code: | 1351 | PUBLIC HEALTH | | |
| *Status: | Active | | | |
| Country: | USA | United States | | |
| State: | FL | Florida | | |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA | | |
| Minor Code: | | | | |
| Average Grade: | | | | |
| | <input checked="" type="checkbox"/> Graduated | | | |
| | <input type="checkbox"/> Terminal Degree for Discipline | | | |
| | <input type="checkbox"/> Qualifying | | | |
| | <input type="checkbox"/> Accredited | | | |

- Adjust the Date Acquired of the new row to reflect the date the degree was acquired. *Using the example provided above, the new Date Acquired is: **July 1, 2008***

The screenshot shows a 'Details' window for a degree record. The 'Date Acquired' field is highlighted with a red box and contains the text '07/01/2008'. Other fields include 'Degree' (MSPH), 'Major Code' (1351), 'Status' (Active), 'Country' (USA), 'State' (FL), 'School Code' (137351), and 'Educator' (Master of Public Health Practice). There are also checkboxes for 'Graduated', 'Terminal Degree for Discipline', 'Qualifying', and 'Accredited'.

- Complete the additional fields according to the instructions in section 4.3.
- Click OK to return to the Person Profile page.
- Click the Save button located at the bottom of the Person Profile page to commit the entry.

NOTE: Once the record is saved, the Degree and Major Codes cannot be changed.

- Click on “Return to Search” to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.5.2 Adding a Historical Dated Row End-Stack

Inserting a row end-stack is the process of adding a row **AT THE END** of one or multiple existing records. For example, if the user is entering a degree with a January 1, 2001 Effective Date and two degrees currently exist with the Effective Dates of June 1, 2003 and April 1, 2002 the user will be required to enter the January 2001 row **end-stack**.

Follow the following steps to enter a historical dated degree end-stack:

- Follow the instructions from section “[4.1. Locating a Member](#)” to search for the member’s record.
- Click the Education tab and scroll down to the Memberships content section. A list of the member’s current degrees will display under the Degrees content section
- In the Degrees column, click on the existing degree record in which a historical dated row will be entered.

| Degrees (Approval Not Required) | | | | | |
|---------------------------------|---|------------------|-------------------------------------|--------------|--|
| ID | Degree | Major Code | Qualifying | View History | |
| B | Bachelors Degree | BIOLOGY, GENERAL | <input checked="" type="checkbox"/> | | |
| MSPH | Master of Public Health | PUBLIC HEALTH | <input type="checkbox"/> | | |

The user will be directed to the “Update Degrees” page.

4. Click “View All” in the top right corner of the Details bar to view all current rows on the member’s record.

Person Profile

Update Degrees

Empl ID:

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details View All First 1 of 3 Last

***Date Acquired:**

Degree: MSPH Master of Public Health

Major Code: 1351 PUBLIC HEALTH

***Status:**

Country: United States

State: Florida

School Code: UNIVERSITY OF SOUTH FLORIDA

Minor Code:

Average Grade:

Graduated

Terminal Degree for Discipline

Qualifying

Accredited

Educator:

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5. Click the  sign located on the most historically dated row. *Using the example above the most historically dated row is: August 1, 2007.*

Details Find | View 1 First 1-3 of 3 Last

| | | |
|-----------------|--|---|
| *Date Acquired: | 06/01/2009 |    |
| Degree: | MSPH | Master of Public Health |
| Major Code: | 1351 | PUBLIC HEALTH |
| *Status: | Active | |
| Country: | USA | United States |
| State: | FL | Florida |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA |
| Minor Code: | | |
| Average Grade: | | |
| | <input checked="" type="checkbox"/> Graduated | |
| | <input type="checkbox"/> Terminal Degree for Discipline | |
| | <input type="checkbox"/> Qualifying | |
| | <input type="checkbox"/> Accredited | |
| Educator: | Master of Public Health Practice  | |

| | | |
|-----------------|--|---|
| *Date Acquired: | 08/01/2007 |    |
| Degree: | MSPH | Master of Public Health |
| Major Code: | 1351 | PUBLIC HEALTH |
| *Status: | Active | |
| Country: | USA | United States |
| State: | FL | Florida |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA |
| Minor Code: | | |
| Average Grade: | | |
| | <input checked="" type="checkbox"/> Graduated | |
| | <input type="checkbox"/> Terminal Degree for Discipline | |
| | <input type="checkbox"/> Qualifying | |
| | <input type="checkbox"/> Accredited | |
| Educator: | Master of Public Health Practice  | |

| | | |
|-----------------|--|---|
| *Date Acquired: | 08/01/2007 |    |
| Degree: | MSPH | Master of Public Health |
| Major Code: | 1351 | PUBLIC HEALTH |
| *Status: | Active | |
| Country: | USA | United States |
| State: | FL | Florida |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA |
| Minor Code: | | |
| Average Grade: | | |
| | <input checked="" type="checkbox"/> Graduated | |
| | <input type="checkbox"/> Terminal Degree for Discipline | |
| | <input type="checkbox"/> Qualifying | |
| | <input type="checkbox"/> Accredited | |
| Educator: | Master of Public Health Practice  | |



- A new degree record is created with the historical date populated in the Date Acquired field. The Details box will display “1 of 4” in the upper right corner of the record. Any of the fields that were populated on the historical dated row will be brought forward and populated on the new row.

The screenshot shows a 'Details' window with two rows of data. The top row is for the date 07/01/2008 and the bottom row is for 06/01/2009. Both rows have identical data: Degree: MSPH (Master of Public Health), Major Code: 1351 (PUBLIC HEALTH), Status: Active, Country: USA (United States), State: FL (Florida), School Code: 137351 (UNIVERSITY OF SOUTH FLORIDA), and Educator: Master of Public Health Practice. The top row has a red arrow pointing to the '1 of 4' indicator in the top right corner.

| Field | 07/01/2008 | 06/01/2009 |
|-----------------|---|---|
| *Date Acquired: | 07/01/2008 | 06/01/2009 |
| Degree: | MSPH | MSPH |
| | Master of Public Health | Master of Public Health |
| Major Code: | 1351 | 1351 |
| | PUBLIC HEALTH | PUBLIC HEALTH |
| *Status: | Active | Active |
| Country: | USA | USA |
| | United States | United States |
| State: | FL | FL |
| | Florida | Florida |
| School Code: | 137351 | 137351 |
| | UNIVERSITY OF SOUTH FLORIDA | UNIVERSITY OF SOUTH FLORIDA |
| Minor Code: | | |
| Average Grade: | | |
| | <input checked="" type="checkbox"/> Graduated | <input checked="" type="checkbox"/> Graduated |
| | <input type="checkbox"/> Terminal Degree for Discipline | <input type="checkbox"/> Terminal Degree for Discipline |
| | <input type="checkbox"/> Qualifying | <input type="checkbox"/> Qualifying |
| | <input type="checkbox"/> Accredited | <input type="checkbox"/> Accredited |
| Educator: | Master of Public Health Practice | Master of Public Health Practice |

Education User Guide

| | | | | |
|-----------------|---|-----------------------------|--|--|
| *Date Acquired: | 08/01/2007 | | | |
| Degree: | MSPH | Master of Public Health | | |
| Major Code: | 1351 | PUBLIC HEALTH | | |
| *Status: | Active | | | |
| Country: | USA | United States | | |
| State: | FL | Florida | | |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA | | |
| Minor Code: | | | | |
| Average Grade: | | | | |
| | <input checked="" type="checkbox"/> Graduated | | | |
| | <input type="checkbox"/> Terminal Degree for Discipline | | | |
| | <input type="checkbox"/> Qualifying | | | |
| | <input type="checkbox"/> Accredited | | | |
| Educator: | Master of Public Health Practice | | | |

| | | | | |
|-----------------|---|-----------------------------|--|--|
| *Date Acquired: | 08/01/2007 | | | |
| Degree: | MSPH | Master of Public Health | | |
| Major Code: | 1351 | PUBLIC HEALTH | | |
| *Status: | Active | | | |
| Country: | USA | United States | | |
| State: | FL | Florida | | |
| School Code: | 137351 | UNIVERSITY OF SOUTH FLORIDA | | |
| Minor Code: | | | | |
| Average Grade: | | | | |
| | <input checked="" type="checkbox"/> Graduated | | | |
| | <input type="checkbox"/> Terminal Degree for Discipline | | | |
| | <input type="checkbox"/> Qualifying | | | |
| | <input type="checkbox"/> Accredited | | | |
| Educator: | Master of Public Health Practice | | | |

- Adjust the Date Acquired of the **LAST** row to reflect the date of the new degree being entered on the record. *Using the example provided above, the new Date Acquired is: **January 1, 2001***

The screenshot shows a 'Details' window with the following information:

- Date Acquired:** 01/01/2001
- Degree:** MSPH (Master of Public Health)
- Major Code:** 1351 (PUBLIC HEALTH)
- Status:** Active
- Country:** USA (United States)
- State:** FL (Florida)
- School Code:** 137351 (UNIVERSITY OF SOUTH FLORIDA)
- Minor Code:** (empty)
- Average Grade:** (empty)
- Checkboxes:**
 - Graduated
 - Terminal Degree for Discipline
 - Qualifying
 - Accredited
- Educator:** Master of Public Health Practice

- Complete the additional fields according to the instructions in section "[4.3. Add a New Degree](#)".
- Click OK. After you click OK you will be returned to the Person Profile page.
- Click the Save button located at the bottom of the Person Profile page to commit the entry.
- Click on "Return to Search" to enter information on a different member or Home to return to the Portal Homepage.

5 Correcting a Degree Record

5.1 Correcting a Degree and/or Major Code

If the Degree and/or Major Codes need to be corrected, the user MUST first delete the record and reenter it using the correct Degree or Major Code. Directions on how to delete a record can be found in section "[6. Deleting a Degree](#)".

5.2 Correcting other Degree Data

1. Follow the instructions in section "[4.1. Locating a Member](#)" to search for the member's record.
2. Change/correct the appropriate fields.
3. Click OK to return to the Person Profile page
4. Click Save at the bottom of the Person Profile page to commit the changes

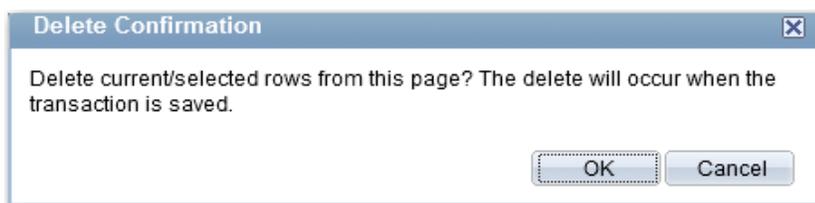
6 Deleting a Degree

As with any delete function, use extreme caution when performing delete transactions. It is possible to delete the wrong record or records, especially if the member has multiple instances of the degree. If a record is erroneously deleted, it will have to be recreated.

Note: If this is a degree that has just been added, the  button used to delete some records will not appear until the user leaves the page and returns. The easiest resolution is to click “Return to Search” and then re-enter the member’s profile. This is a nuance of the application.

6.1 Deleting a Single Degree

1. Follow the instructions from section “[4.1. Locating a Member](#)”, to search for the member’s record.
2. Click the Education tab.
3. Click the trashcan on the degree row to be deleted.
4. Click OK to confirm the deletion.



5. Click OK to return to the Person Profile page.
6. Click Save at the bottom of the Person Profile page to commit the changes.

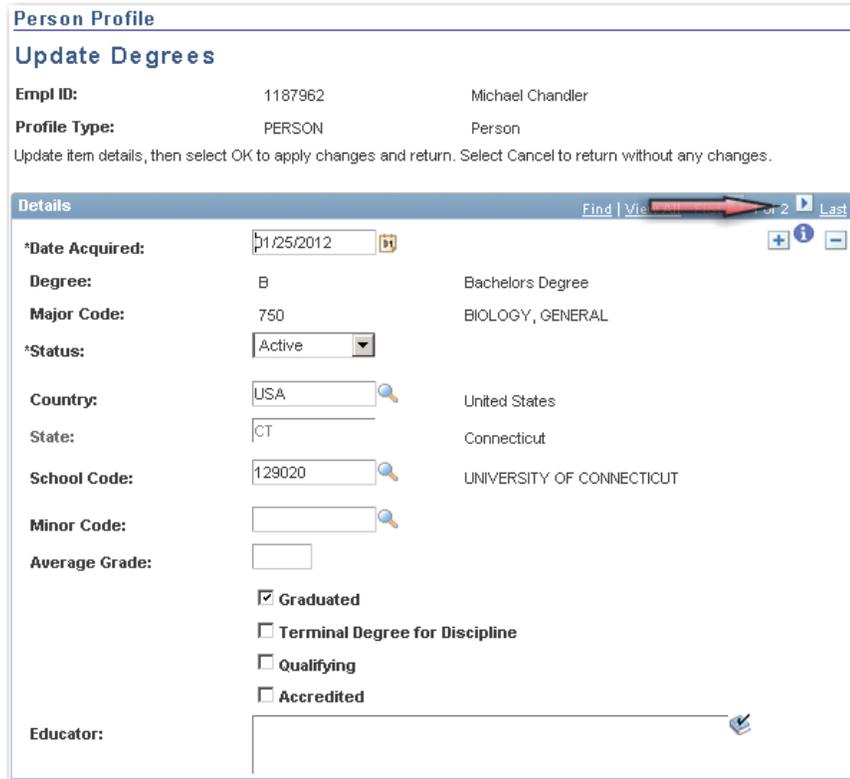
6.2 Deleting One Degree of Multiple Instances

1. To delete one degree of multiple records of the same type, select the Degree.

| Degrees (Approval Not Required) | | | | | |
|---------------------------------|---|------------------|-------------------------------------|---|---|
| ID | Degree | Major Code | Qualifying | View History | |
| B | Bachelors Degree | BIOLOGY, GENERAL | <input checked="" type="checkbox"/> |  |  |
| MSPH | Master of Public Health | PUBLIC HEALTH | <input type="checkbox"/> |  |  |

Education User Guide

2. Scroll through the records using the arrows to find the correct record to delete.



Person Profile
Update Degrees

Empl ID: 1187962 Michael Chandler
Profile Type: PERSON Person

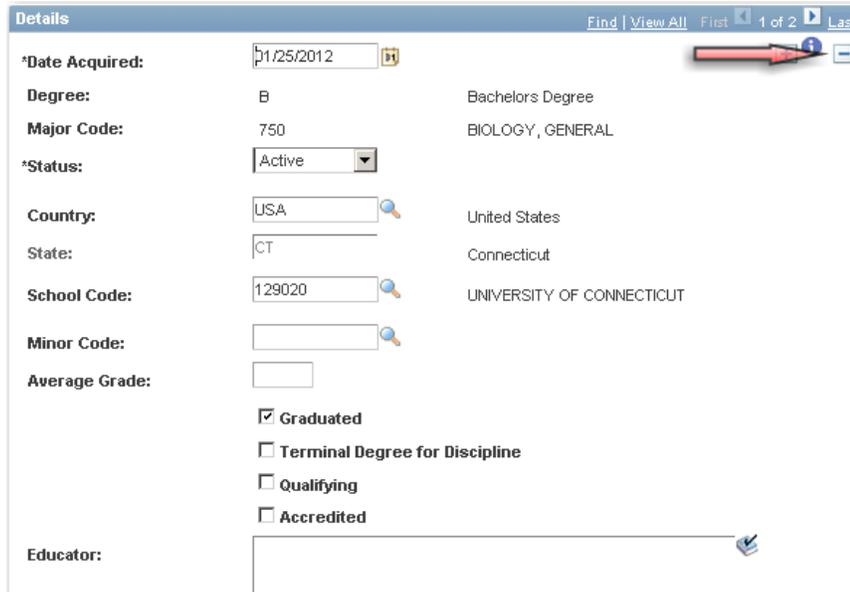
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View All | 1 of 2 | Last

*Date Acquired: 1/25/2012
Degree: B Bachelors Degree
Major Code: 750 BIOLOGY, GENERAL
*Status: Active
Country: USA United States
State: CT Connecticut
School Code: 129020 UNIVERSITY OF CONNECTICUT
Minor Code:
Average Grade:
 Graduated
 Terminal Degree for Discipline
 Qualifying
 Accredited
Educator:
+ i -

Users can also “View All” records to search for the record to be deleted.

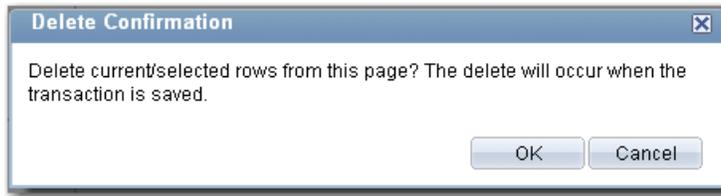
3. Once the correct record has been located, click the  button in the upper right corner of the record.



Details Find | View All | First | 1 of 2 | Last

*Date Acquired: 1/25/2012
Degree: B Bachelors Degree
Major Code: 750 BIOLOGY, GENERAL
*Status: Active
Country: USA United States
State: CT Connecticut
School Code: 129020 UNIVERSITY OF CONNECTICUT
Minor Code:
Average Grade:
 Graduated
 Terminal Degree for Discipline
 Qualifying
 Accredited
Educator:
+ i -

4. Click OK to confirm the deletion

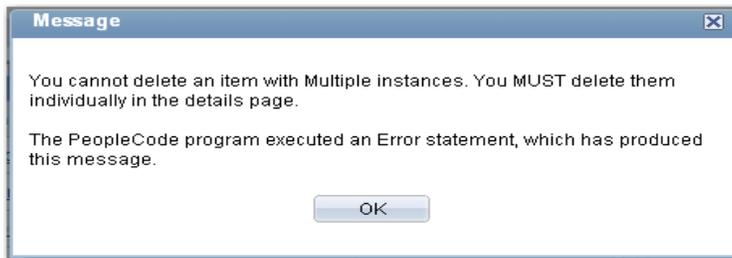


5. Click OK to return to the Person Profile page.
6. Click Save at the bottom of the Page Profile to commit the changes.

6.3 Deleting All Records for a Degree Type

Each record must be deleted individually using the steps outlined in section "[6.2 Deleting One Degree of Multiple Instances](#)". To prevent unintentional deletions of degrees, the trashcan functionality for multiple instances has been disabled.

The following message will appear if you attempt to delete multiple instances at one time:



UNITED STATES COAST GUARD



Person Profile

Language/Foreign Language Test Results

3/5/2012

Prepared by
Commandant (CG-631)
U.S. Coast Guard
1900 Half Street, SW
Washington, DC 20593-0001

Step-by step instructions on adding, updating and deleting member languages in Direct Access.

Encl (4)

Language/Foreign Language Test Results

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Language/Foreign Language Test Results

1. Introduction

This section provides the procedure for the unit Educational Services Officer (ESO) and/or the Servicing Personnel Offices to enter a member's Defense Language Proficiency Test (DLPT). The information is available to the member via self service.

Note: In order for the member to be eligible for Foreign Language Proficiency Pay (FLPP), Foreign Language/DLPT Test results must be entered following these steps outlined in this section.

2. Portal Navigation

The user can navigate to the Person Profiles page using the path below. At any time, if a user needs to return to the home screen, the user can click the "Home" link in the upper right-hand corner of the window.

Enterprise Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Qualifications: This link takes the user to the Person Profile screen. Languages/Foreign Language Test Results are recorded on the Person Profile screen.

3. Wildcard Search

Direct Access supports the use of three wildcard features when searching for data. The wildcards can be helpful in finding the exact information that user wants to process. The following are the supported standard wildcard features.

| Character | Function |
|------------------|--|
| % (percent sign) | Match one or more characters. |
| _ (underscore) | Match any single character. |
| \ (back slash) | Escape character – don't treat the next character as a wildcard. |

When attempting to search for a member, you may use the "wildcard" search feature. One commonly used wildcard is the "_" sign. The use of this sign represents a single letter instead of a group of letters. For example, if you would like to see all the members whose last names contain the letters "C", "H" and "N", in that order, the "_" wildcard would be used to represent a single letter between the characters in which it is placed. An example of the search results when a "_" is used is located below.

Language/Foreign Language Test Results

Find an Existing Value
Add a New Value

Maximum number of rows to return (up to 300):

Empl ID: begins with
Profile Type: begins with
Name: begins with
Last Name: begins with
Alternate Character Name: begins with

Include History
 Correct History
 Case Sensitive

 [Basic Search](#)
 [Save Search Criteria](#)

Search Results

Only the first 300 results of a possible 489 can be displayed. Enter more search key information and search again to re

First 101-200 of 300 Last

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|-------------|--------------------------|
| | AWARDS COORD | | CHANDLER | (blank) |
| | PERSON | | CHANDLER | (blank) |
| | PERSON | | CHANDRASENA | (blank) |
| | PERSON | | CHANES | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |

Another wildcard that is commonly used is the “%” sign. This wildcard is used to represent multiple characters. For example, if you would like to see all members whose last names contain the letters “C”, “H” and “N”, regardless of the order of the letters in the name, the “%” wildcard should be used. Below is an illustration of this example.

Find an Existing Value
Add a New Value

Maximum number of rows to return (up to 300):

Empl ID: begins with
Profile Type: begins with
Name: begins with
Last Name: begins with
Alternate Character Name: begins with

Include History
 Correct History
 Case Sensitive

 [Basic Search](#)
 [Save Search Criteria](#)

Search Results

Only the first 300 results of a possible 1459 can be displayed. Enter more search key information and sea

First 1-100 of 300 Last

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|------------|--------------------------|
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | RETIREE | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | AWARDS COORD | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHADBAND | (blank) |
| | PERSON | | CHADBOURNE | (blank) |

4. Entering a new Language/Foreign Language Test Results

When information about a member's Foreign Language Test Results is received and ready to be entered into Direct Access, navigate to the following page:

Portal Link: Person Profile

Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Direct Access also remembers recently used pages. If you have used the Person Profile page recently, you can go to Favorites > Recently Used > Person Profiles

4.1. Locating the Member

1. Use the Search record to pull up the member's Person Profile using the member's EMPLID or name.

Note: When attempting to search for a member, you may use the Direct Access "wildcard" search feature. Refer to section "[3. Wildcard Search](#)" for further instruction

Person Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Maximum number of rows to return (up to 300): 300

Empl ID: begins with [input] 

Profile Type: begins with [input] 

Name: begins with [input]

Last Name: begins with [input]

Alternate Character Name: begins with [input]

Include History Correct History Case Sensitive

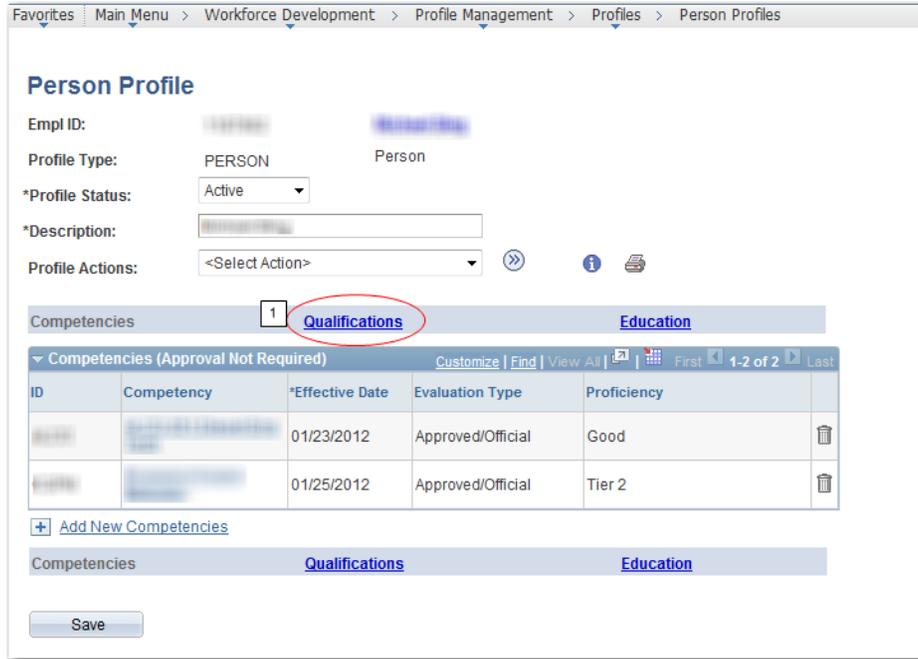
Search Clear Basic Search  Save Search Criteria

2. Click the Search button. If the search returns more than one record, be sure to select the correct member's record that has "PERSON" in the Profile Type column

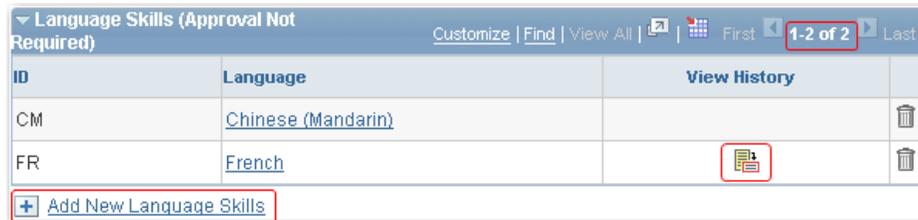
| | |
|--------|---------|
| PERSON | (blank) |
|--------|---------|

4.2. Viewing Languages

1. Click on the Qualifications link.



A list of the member’s current Languages will display in the Languages content section



Languages with the same Language Codes are grouped together. The  icon in the “View History” column signifies that the member has received the language more than once. Click on the icon to view all instances of the language.

Below is an example of all the languages the member has under the ‘French’ Language Code:



2. If the member has more than five language rows, only the first five will be displayed. Click on the View All link to display all of the member’s languages.

4.3. Adding a New Language/Foreign Language Test Result

1. To add a new Foreign Language Test Results to the member’s profile, Click on the “+ Add New Language Skills” link. The “Add new Language Skills” page appears.



Note: All the fields will be blank if the member does not have any Foreign Language Test Results present in the system.

The screenshot shows the "Add New Language Skills" form. It includes fields for:

- *Data Entry Date: 01/25/2012
- *Language: (empty search field)
- *Status: Active
- Proficiency Level: (empty dropdown)
- Listening Test Date: (empty date field)
- Reading Test Date: (empty date field)
- *Expiration Date: (empty date field)
- Reading Score: (empty text field)
- Listening Score: (empty text field)

 At the bottom are buttons for "OK", "Cancel", and "Apply and Add Another".

2. On the Add New Languages page enter the data about the Foreign Language:

| Field | Description/Instructions |
|---------------------------------------|--|
| *Data Entry Date (Required) | This field defaults to today’s date. You can change the date by Data Entry Date field. |
| *Language (Required) | Enter the Language code or, search for the Language code by clicking on the magnifying glass. Click the ‘Look Up’ button to see a list of all languages or enter search criteria and then click ‘Look Up’. |
| *Status (Required) | This field defaults to “Active”. DO NOT change this field. |
| Proficiency Level | Enter the Proficiency level based on the listening and reading |

Language/Foreign Language Test Results

| | |
|---------------------------------------|---|
| | test scores |
| Listening Test Date | Enter the date the Listening Test was taken for the language being entered. |
| Reading Test Date | Enter the date the Reading Test was taken for the language being entered. |
| *Expiration Date (Required) | Enter the Expiration Date for the language being entered. |
| Reading Score | Enter the Reading test score received for the language being entered. |
| Listening Score | Enter the Listening test score received for the language being entered. |

3. Click “OK” to return to the Person Profile page.
4. Click “Save” at the bottom of the Person Profile page to commit the changes.

NOTE: If the wrong language was selected, delete it and repeat Step 4.3.

4.4. Adding a Previously Granted Foreign Language Test Results for the Same Type of Language

Same Language can be granted multiple times based on how often the member takes the Defense Language Proficiency Test. In these cases, the procedure to add the Foreign Language Test Result to a member’s Person Profile is slightly different. To add another instance of the same Language, follow these steps:

1. Click the Qualifications tab. A list of the member’s current languages will display under the Languages content section
2. In the Language column, click on the existing language row



3. The user will be directed to the “Update Languages” page. Click on the  sign in the top right corner of the Detail box to insert a new effective dated row

Language/Foreign Language Test Results

Person Profile

Update Language Skills

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View All First 1 of 1 Last

| | | | |
|----------------------|---------------|---|---|
| *Data Entry Date: | 01/24/2011 |  |   |
| Language: | FR | French | |
| *Status: | Active | | |
| Proficiency Level: | Interpreter 4 | | |
| Listening Test Date: | 01/02/2011 |  | |
| Reading Test Date: | 01/02/2011 |  | |
| *Expiration Date: | 01/02/2012 |  | |
| Reading Score: | 3+ | |  |
| Listening Score: | 2 | |  |

OK Cancel

A new Language Skills record is created with the current date populated in the Data Entry Date field. Also, the record will say "1 of x" in the upper right corner of the record. Any fields that were populated on the previous Language row will be brought forward and populated on the new row.

Language/Foreign Language Test Results

Person Profile

Update Language Skills

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View All First 1 of 2 Last

*Data Entry Date: 01/25/2012

Language: FR French

*Status: Active

Proficiency Level: Interpreter 4

Listening Test Date: 01/02/2011

Reading Test Date: 01/02/2011

*Expiration Date: 01/02/2012

Reading Score: 3+

Listening Score: 2

OK Cancel

4. Enter the data in the same manner as “[4.3 Adding a New Language/Foreign Language Test Result.](#)”
5. Verify that all fields are correct. The application will automatically pull data from the previous record into the new one. The user will need to correct or delete the data in all pre-populated fields, if necessary.
6. Click “OK” to return to the Person Profile page.
7. Upon returning to the Qualifications tab, the multiple records icon will be there. 
8. Click “Save” at the bottom of the Person Profile page to commit the changes.

NOTE: Once the record is saved, the Language code cannot be changed.

5. Correcting a Language/ Foreign Language Test Result Record

5.1. Correcting a Language Code

If the Language Code needs to be corrected, the user **MUST** first delete the Language record and re-enter it using the correct Language Code. Follow the steps in section “6. Deleting a Language” to delete a Language record.

Language/Foreign Language Test Results

5.2. Correcting other Language Data

1. Follow the instructions in section “[4.1 Locating the Member](#)” to search for the member’s record.
2. From the Language Skills content section, select the language to be updated or corrected. If the member has received the language multiple times, be sure to select the correct language record.
3. Change/correct the appropriate fields.
4. Click “OK” to return to the Person Profile page.
5. Click “Save” at the bottom of the Person Profile page to commit the changes.

6. Deleting a Language

As with any delete function, use extreme caution when performing delete transactions. It is possible to delete the wrong record or records, especially if the member has multiple instances of the same language. If a record is erroneously deleted, it will have to be recreated.

NOTE: If this is a language that has just been added, the “-“button used to delete some records will not appear until the user leaves the page and returns. The easiest resolution is to click “Return to Search” and then re-enter the member’s profile. This is a nuance of the application.

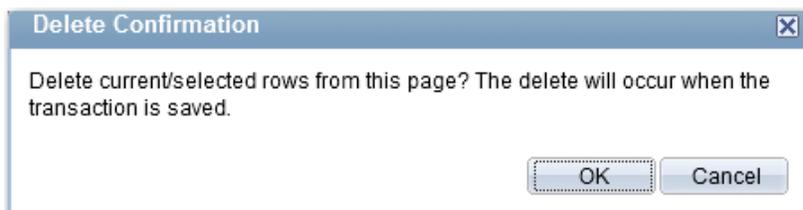
6.1. Deleting a Single Language Skill

1. Follow the instructions in section “[4.1. Locating the Member](#)” to search for the member’s record.
2. From the Language Skills content section, select the language to be deleted. If the member has received the language multiple times, be sure to select the correct language record.
3. To delete a Language Skill that a member has received only once, click the trash can on the Language row



| ID | Language | View History | |
|----|------------------------------------|---|---|
| CM | Chinese (Mandarin) | |  |
| FR | French |  |  |

4. Click “OK” to confirm the deletion.



Language/Foreign Language Test Results

5. Click “OK” to return to the Person Profile page.
6. Click “Save” at the bottom of the Person Profile page to commit the changes.

6.2. Deleting One Language Where Multiple Instances Exists

1. To delete one Language Skill of multiple records of the same type, select the Language.



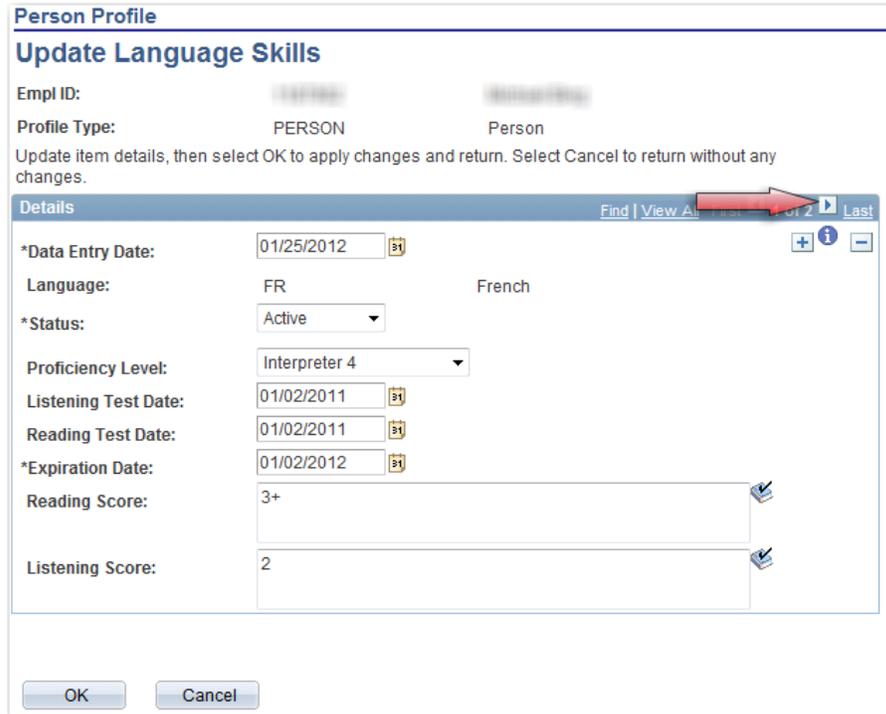
| ID | Language | View History |
|----|------------------------------------|--------------|
| CM | Chinese (Mandarin) | |
| FR | French | |



| Effective Date | Language | ID |
|----------------|------------------------|----|
| 01/02/2012 | French | FR |
| 01/24/2011 | French | FR |

[Return to Profile](#)

2. Scroll through the records using the arrows to find the correct record to delete.



Person Profile

Update Language Skills

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

| Details | | Find View All [REDACTED] [REDACTED] First 1-2 of 2 Last |
|----------------------|---------------|---|
| *Data Entry Date: | 01/25/2012 | [+] [i] [-] |
| Language: | FR French | |
| *Status: | Active | |
| Proficiency Level: | Interpreter 4 | |
| Listening Test Date: | 01/02/2011 | [+] |
| Reading Test Date: | 01/02/2011 | [+] |
| *Expiration Date: | 01/02/2012 | [+] |
| Reading Score: | 3+ | [+] |
| Listening Score: | 2 | [+] |

OK Cancel

Language/Foreign Language Test Results

Users can also “View All” records.

Person Profile

Update Language Skills

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details | View All | First | 1 of 2 | Last

*Data Entry Date: 01/25/2012

Language: FR French

*Status: Active

Proficiency Level: Interpreter 4

Listening Test Date: 01/02/2011

Reading Test Date: 01/02/2011

*Expiration Date: 01/02/2012

Reading Score: 3+

Listening Score: 2

OK Cancel

3. Once the correct record has been located, click the “-“ button in the upper right-hand corner of the record.

Language/Foreign Language Test Results

Person Profile

Update Language Skills

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View All First 1 of 2 Last

*Data Entry Date: 01/25/2012

Language: FR French

*Status: Active

Proficiency Level: Interpreter 4

Listening Test Date: 01/02/2011

Reading Test Date: 01/02/2011

*Expiration Date: 01/02/2012

Reading Score: 3+

Listening Score: 2

OK Cancel

4. Click "OK" to confirm the deletion

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK Cancel

5. Click "OK" to return to the Person Profile page.
6. Click "Save" at the bottom of the Person Profile page to commit the changes.

6.3. Deleting All Records for a Language Skill

This process is the same as deleting only one instance of a Language code. Each record must be deleted individually using the steps outlined in section ["6.2. Deleting One Language Where Multiple Instances Exist"](#).

To prevent unintentional deletions of awards, the trash can functionality for multiple languages of one type has been disabled.

The following message will appear if you attempt to delete multiple languages at one time:

Message

You cannot delete an item with Multiple instances. You MUST delete them individually in the details page.

The PeopleCode program executed an Error statement, which has produced this message.

OK

UNITED STATES COAST GUARD



Person Profiles

Licenses and Certifications

03/5/2012

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Step-by step instructions on adding, updating and deleting Licenses and Certifications data in Direct Access.

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1 Introduction

Individual USCG licenses and certifications are maintained in the Person Profile of Direct Access. Authorized users enter and maintain this information. The information is available to USCG members via self-service. This section provides the procedure for adding, updating, and deleting Licenses & Certifications via the Person Profile page.

2 Portal Navigation

The user can navigate to the Person Profiles page using the path below. At any time, if a user needs to return to the home screen, the user can click the “Home” link in the upper right-hand corner of the window.

Enterprise Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Licenses/Certifications: This navigation takes the user to the Person Profile screen. Licenses/Certifications are recorded on the Person Profile screen.

3 Wildcard Search

Direct Access supports the use of three wildcard features when searching for data. The wildcards can be helpful in finding the exact information that user wants to process. The following are the supported standard wildcard features.

| Character | Function |
|------------------|--|
| % (percent sign) | Match one or more characters. |
| _ (underscore) | Match any single character. |
| \ (back slash) | Escape character – don’t treat the next character as a wildcard. |

When attempting to search for a member, you may use the “wildcard” search feature. One commonly used wildcard is the “_” sign. The use of this sign represents a single letter instead of a group of letters. For example, if you would like to see all the members whose last names contain the letters “C”, “H” and “N”, in that order, the “_” wildcard would be used to represent a single letter between the characters in which it is placed. An example of the search results when a “_” is used is located below.

The screenshot shows a search interface with the following elements:

- Buttons: "Find an Existing Value" and "Add a New Value".
- Search Criteria:
 - Maximum number of rows to return (up to 300): 300
 - Empl ID: begins with
 - Profile Type: begins with
 - Name: begins with
 - Last Name: begins with CH_N
 - Alternate Character Name: begins with
- Options: Include History, Correct History, Case Sensitive
- Buttons: Search, Clear, Basic Search, Save Search Criteria
- Search Results:
 - Message: "Only the first 300 results of a possible 489 can be displayed. Enter more search key information and search again to re..."
 - Navigation: View All, First, 101-200 of 300, Last
 - Table with columns: Empl ID, Profile Type, Name, Last Name, Alternate Character Name.

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|-------------|--------------------------|
| | AWARDS COORD | | CHANDLER | (blank) |
| | PERSON | | CHANDLER | (blank) |
| | PERSON | | CHANDRASENA | (blank) |
| | PERSON | | CHANES | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |

Another wildcard that is commonly used is the “%” sign. This wildcard is used to represent multiple characters. For example, if you would like to see all members whose last names contain the letters “C”, “H”

and “N”, regardless of the order of the letters in the name, the “%” wildcard should be used. Below is an illustration of this example.

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300): 300

Empl ID: begins with []

Profile Type: begins with []

Name: begins with []

Last Name: begins with [CH%N]

Alternate Character Name: begins with []

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

Only the first 300 results of a possible 1459 can be displayed. Enter more search key information and see [View All](#) First 1-100 of 300 Last

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|------------|--------------------------|
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | RETIREE | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | AWARDS COORD | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHADBRAND | (blank) |
| | PERSON | | CHADBOURNE | (blank) |

4 Entering a License or Certification

When information about a member’s License or Certification is received and ready to be entered into Direct Access, navigate to the following page:

Portal Link: Person Profile

Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

4.1 Locating the Member

1. Use the Search record to pull up the member’s Person Profile using the member’s EMPLID or name.

HINT: When attempting to search for a member, you may use the Direct Access “wildcard” search feature. Refer to section ‘[3. Wildcard Search](#)’ for more information.

Person Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300): 300

Empl ID: begins with []

Profile Type: begins with []

Name: begins with []

Last Name: begins with []

Alternate Character Name: begins with []

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Licenses and Certifications

2. Click the Search button. If the search returns more than one record, be sure to select the correct member's record that has "PERSON" in the Profile Type column.



Note: If a member has both a Person Profile and an Awards Coordinator Profile, then that member is a PHS officer who is or has been assigned to the Coast Guard for duty. Use the "PERSON" profile to record the data.

4.2 Viewing Licenses or Certifications

1. Click the Qualifications tab.

Person Profile

Empl ID: [redacted] [View Profile](#)

Profile Type: PERSON Person

*Profile Status: Active

*Description: [redacted]

Profile Actions: <Select Action> [»](#) [i](#) [»](#)

Competencies **Qualifications** Education

| ID | Competency | *Effective Date | Evaluation Type | Proficiency | |
|------------|------------|-----------------|-------------------|-------------|--------------------|
| [redacted] | [redacted] | 02/01/1989 | Approved/Official | Good | 🗑️ |
| [redacted] | [redacted] | 02/01/1989 | Approved/Official | Good | 🗑️ |
| [redacted] | [redacted] | 06/01/2002 | Approved/Official | Good | 🗑️ |
| [redacted] | [redacted] | 10/06/2008 | Approved/Official | Good | 🗑️ |
| [redacted] | [redacted] | 06/01/2002 | Approved/Official | Good | 🗑️ |

[+ Add New Competencies](#)

A list of the member's current Licenses & Certifications will be displayed in the Licenses & Certificates content section.

Person Profile

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

*Profile Status: Active

*Description: [REDACTED]

Profile Actions: <Select Action> [Info] [Print]

Competencies Qualifications **Education**

▶ Honors and Awards (Approval Not Required)

+ Add New Honors and Awards

▶ Language Skills (Approval Not Required)

+ Add New Language Skills

▼ Licenses & Certifications (Approval Not Required) Customize | Find | View All | [Info] [Print] First 1 of 1 Last

| ID | License | Qualifying | Expiration Date | |
|-----|---|--------------------------|-----------------|----------------|
| ATP | Airline Transport Pilot | <input type="checkbox"/> | | [View History] |

+ Add New Licenses & Certifications

▶ Memberships (Approval Not Required)

+ Add New Memberships

NOTE: Licenses/Certifications with the same Code are grouped together. The  icon in the “View History” column signifies that the member has received the license/certification more than once. Click on the icon to view all instances of the license/certification.

- If a member has more than five licenses/certifications, only the first five will be displayed. Click on the View All link to display all of the member’s licenses/certifications. Check to see if the license/certification, with a different effective date, has previously been entered on the member’s record.

▼ Licenses & Certifications (Approval Not Required) Customize | Find | View All | [Info] [Print] First 1-5 of 6 Last

| ID | License | Qualifying | Expiration Date | View History | |
|----------|---|--------------------------|-----------------|--------------|----------------|
| 2NDMTEST | 2nd Mate Steam MV (ocean) | <input type="checkbox"/> | 01/01/2016 | | [View History] |
| ASCEPM | AA Certif Project Management | <input type="checkbox"/> | | | [View History] |
| CGMCPM | Masters Cert in Project Mnqmt | <input type="checkbox"/> | | | [View History] |
| CGPM1 | Program Manager | <input type="checkbox"/> | 02/02/2014 | | [View History] |
| LOCKSMIT | Locksmith License | <input type="checkbox"/> | | | [View History] |

- If the license/certification is a new license/certification, proceed to section [‘4.3 Adding a New License or Certification’](#). If the license/certification currently exists, proceed to section [‘4.4 Adding a Previously Granted License or Certification of the Same Type’](#). To add a historical dated

license/certification, proceed to section [‘4.5 Adding a Historical Dated License or Certification of the Same Type’](#).

4.3 Adding a New License or Certification

Follow the steps below to add a new license or certification to a member’s profile.

1. To add a new license/certification, click on the “Add New License & Certification” link located below the Licenses content section.



2. On the “Add New Licenses & Certifications” page, enter the following fields:

| Field | Description/Instructions |
|------------------------------|---|
| *Issue Date (Required) | Enter the date the License or Certification was issued. Also known as the Effective Date . Click on the icon to choose a date. |
| *License (Required) | Click the to access the Lookup License search page. Enter search criteria and click the Lookup button. |
| *Status (Required) | Leave as Active |
| Country | Defaults to USA. If not USA, click the to display the Lookup Country Table. Enter partial search criteria. Click Search to display possible matches. A single click on any column in that row retrieves the page. |
| State | Enter the State abbreviation or click the to display the Lookup State Table. Enter partial search criteria. Click Search to display possible matches. A single click on any column in that row retrieves the page. |
| Type of Restriction | N/A |
| Renewal in Progress | If applicable, check this box |
| License Verified | If applicable, check this box |
| Expiration Date | If applicable, enter the date the License or Certification expires |
| Qualifying | If applicable, check this box |
| License/Certification Number | Enter the License or Certification number |
| Issued By | Enter the organization that issued the License or Certification, i.e., Department of Agriculture, USCG TRACEN Cape May, American Red Cross, etc. |
| OK | Click OK to Save the page. NOTE: The entry will not be saved to the Person Profile until you click SAVE at bottom of the Person Profile page |

For fields that have the ‘Lookup’ icon next to it, you may narrow the search by clicking on the icon and entering a value in one or many of the search fields on the Lookup page.

Licenses and Certifications

- a. **Content Item ID:** Enter all or part of the license/certificate code
- b. **Content Group Type:** N/A
- c. **Content Group:** N/A
- d. **Description:** Enter all or part of the title of the license/certificate

After you click OK you will be returned to the Person Profile page. The new license or certification will be displayed in the summary grid.

3. Click the Save button located at the bottom of the Person Profile page to commit the entry.

NOTE: If the wrong license or certification was selected, delete it and repeat Step [4.3. Adding a New License or Certification](#)

4. Click on “Return to Search” to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.4 Adding a Previously Granted License or Certification of the Same Type

Follow the steps below to add a new row to a License or Certification Code that currently exists in the member’s profile.

NOTE: The system allows a license/certification with different effective dates to be entered on a member’s record multiple times. Adding a new effective dated row involves adding a new row to the license/certification data history.

1. Click the Qualifications tab. A list of the member’s current licenses/certifications will display under the Licenses & Certifications content section

The screenshot shows the 'Qualifications' tab selected. Under the 'Licenses & Certifications (Approval Not Required)' section, there is a table with the following data:

| ID | License | Qualifying | Expiration Date |
|--------|--|--------------------------|-----------------|
| ASCEPM | AA Certif Project Management | <input type="checkbox"/> | |
| ATP | Airline Transport Pilot | <input type="checkbox"/> | |

Below the table is a button: [+ Add New Licenses & Certifications](#)

2. In the License column, click on the existing license/certification record.

Licenses and Certifications

| ID | License | Qualifying | Expiration Date | |
|--------|--|--------------------------|-----------------|--|
| ASCEPM | AA Certif Project Management | <input type="checkbox"/> | | |
| ATP | Airline Transport Pilot | <input type="checkbox"/> | | |

[+ Add New Licenses & Certifications](#)

The user will be directed to the “Update Licenses & Certifications” page.

Person Profile

Update Licenses & Certifications

Empl ID:

Profile Type: PERSON Person

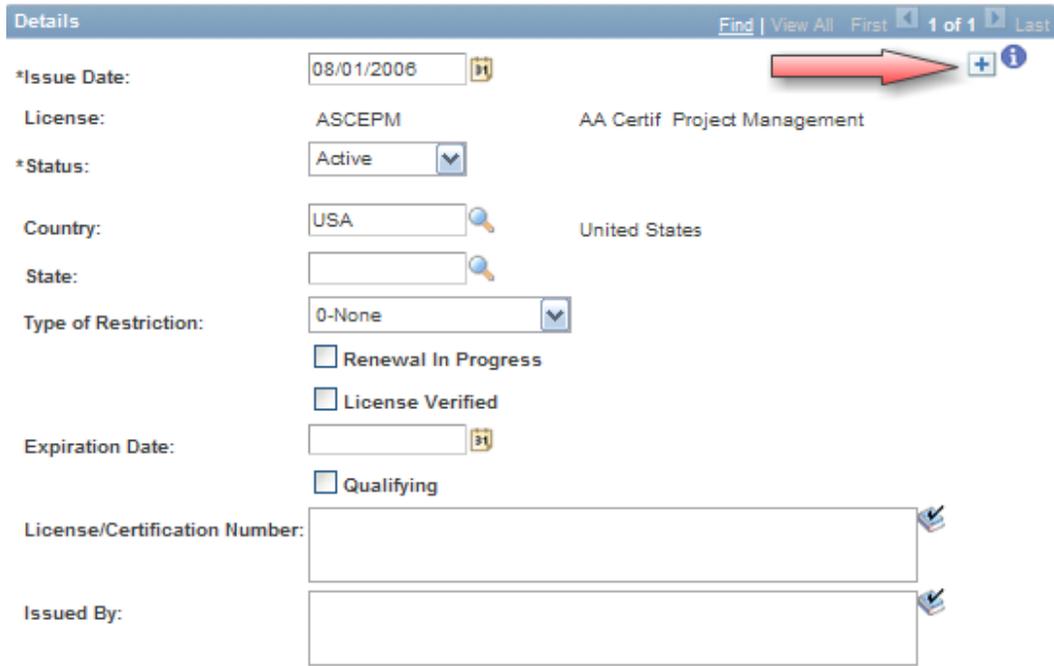
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

| Details | | Find View All | First | 1 of 1 | Last |
|-------------------------------|--|------------------------------|-------|--------|------|
| *Issue Date: | <input type="text" value="08/01/2006"/> | | | | |
| License: | ASCEPM | AA Certif Project Management | | | |
| *Status: | Active | | | | |
| Country: | USA | United States | | | |
| State: | <input type="text"/> | | | | |
| Type of Restriction: | 0-None | | | | |
| | <input type="checkbox"/> Renewal In Progress | | | | |
| | <input type="checkbox"/> License Verified | | | | |
| Expiration Date: | <input type="text"/> | | | | |
| | <input type="checkbox"/> Qualifying | | | | |
| License/Certification Number: | <input type="text"/> | | | | |
| Issued By: | <input type="text"/> | | | | |

IMPORTANT: The system does not allow the entry of duplicate entries in a member’s profile. If you enter a license or certification with an Issue Date that already exists in the member’s profile, you will receive an error message. You must indicate a different date to resolve the error.

Licenses and Certifications

3. Click on the  sign in the top right corner of the Detail box to insert a new effective dated row.

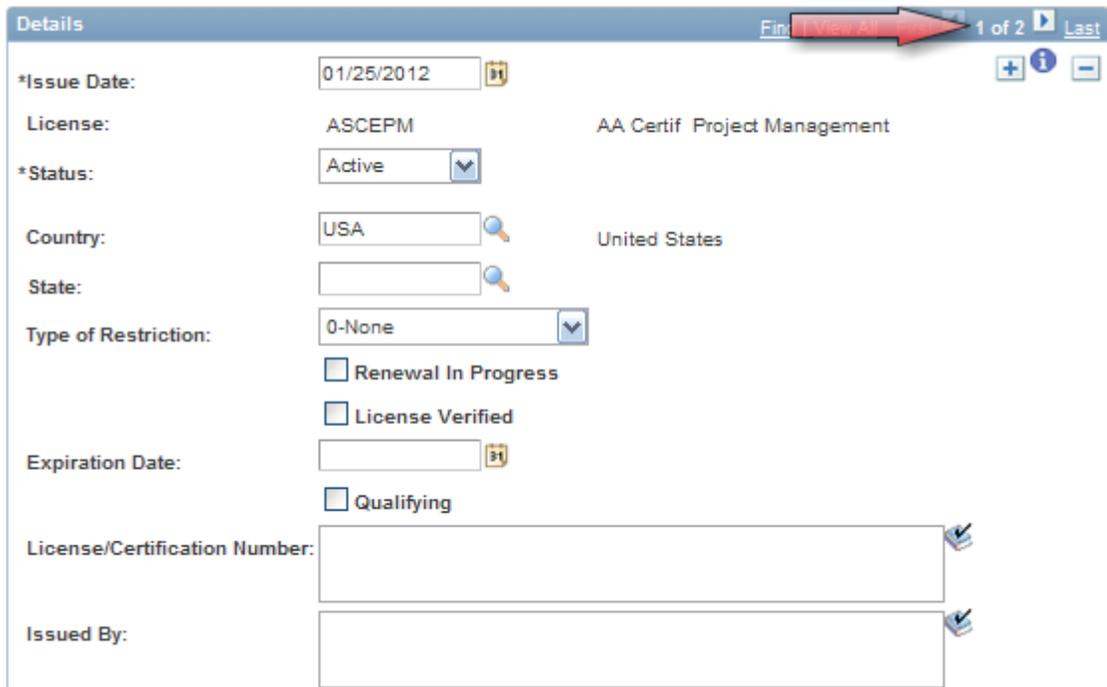


The screenshot shows a 'Details' form for a license/certification record. The form is titled 'Details' and has a search bar with 'Find | View All | First | 1 of 1 | Last'. The fields are as follows:

- *Issue Date: 08/01/2006
- License: ASCEPM AA Certif Project Management
- *Status: Active
- Country: USA United States
- State:
- Type of Restriction: 0-None
- Expiration Date:
- License/Certification Number:
- Issued By:

There are checkboxes for 'Renewal In Progress', 'License Verified', and 'Qualifying'. A red arrow points to a plus sign icon in the top right corner of the form.

4. A new license or certification record is created with the current date populated in the Issue Date field. The Details box will display "1 of 2" in the upper right corner of the record. Any fields that were populated on the previous license/certification row will be brought forward and populated on the new row.



The screenshot shows a 'Details' form for a new license/certification record. The form is titled 'Details' and has a search bar with 'Find | View All | First | 1 of 2 | Last'. The fields are as follows:

- *Issue Date: 01/25/2012
- License: ASCEPM AA Certif Project Management
- *Status: Active
- Country: USA United States
- State:
- Type of Restriction: 0-None
- Expiration Date:
- License/Certification Number:
- Issued By:

There are checkboxes for 'Renewal In Progress', 'License Verified', and 'Qualifying'. A red arrow points to a plus sign icon in the top right corner of the form.

Licenses and Certifications

5. Complete the additional fields as indicated in section '[4.3. Adding a New License or Certification](#)'.
6. Click OK to return to the Person Profile page. Upon returning to the Person Profile page, the multiple records icon  will be displayed on the row for the newly added license/certification.



| ID | License | Qualifying | Expiration Date | View History |
|--------|--|--------------------------|-----------------|---|
| ASCEPM | AA Certif Project Management | <input type="checkbox"/> | |   |
| ATP | Airline Transport Pilot | <input type="checkbox"/> | |  |

[+ Add New Licenses & Certifications](#)

7. Click the Save button located at the bottom of the Person Profile page to commit the entry.
8. Click on “Return to Search” to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.5 Adding a Historical Dated License or Certification of the Same Type

The Effective Date of the license/certification being entered cannot be prior to the Effective Date of the existing license/certification. If the Effective Date of the license/certification being entered is prior to the Effective Date of the license/certification that has already been entered, you will need to enter the new license/certification below the license/certification that already exists and adjust the Effective Dates of both license/certification entries **PRIOR** to saving the page.

4.5.1 Adding a Historical Dated Row Mid-Stack

Inserting a row mid-stack is the process of adding a row **BETWEEN** two existing records. For example, if the user is entering a license/certification with a July 1, 2008 Effective Date and two licenses/certifications currently exist with the Effective Dates of June 1, 2010 and August 1, 2006, the user will be required to enter the July 2008 row **mid-stack**.

Follow the following steps to enter a historical dated license/certification mid-stack:

1. Follow the instructions in section '[4.1. Locating the Member](#)', to search for the member's record.
2. Click the Qualifications tab and search for the Licenses & Certifications content section. A list of the member's current licenses/certifications will display under the Licenses & Certifications content section
3. In the License column, click on the existing license/certification record in which a historical dated row will be entered.

Licenses and Certifications

| Licenses & Certifications (Approval Not Required) | | | | |
|---|--|--------------------------|-----------------|---|
| ID | License | Qualifying | Expiration Date | View History |
| ASCEPM | AA Certif Project Management | <input type="checkbox"/> | |   |
| ATP | Airline Transport Pilot | <input type="checkbox"/> | |  |

[+ Add New Licenses & Certifications](#)

The user will be directed to the “Update Licenses & Certifications” page.

4. Click “View All” in the top right corner of the Details bar to view all current rows on the member’s record.

Update Licenses & Certifications

Empl ID:

Profile Type:

PERSON

Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

| Details | | View All | First | 1 of 2 | Last |
|-------------------------------|--|---|---|---|---|
| *Issue Date: | <input type="text" value="06/01/2010"/> |  |  |  | |
| License: | ASCEPM | AA Certif Project Management | | | |
| *Status: | <input type="text" value="Active"/> |  | | | |
| Country: | <input type="text" value="USA"/> |  | United States | | |
| State: | <input type="text"/> |  | | | |
| Type of Restriction: | <input type="text" value="0-None"/> |  | | | |
| | <input type="checkbox"/> Renewal In Progress | | | | |
| | <input type="checkbox"/> License Verified | | | | |
| Expiration Date: | <input type="text"/> |  | | | |
| | <input type="checkbox"/> Qualifying | | | | |
| License/Certification Number: | <input type="text"/> | | | |  |
| Issued By: | <input type="text"/> | | | |  |

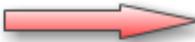
Licenses and Certifications

- Click the  sign located on the most historically dated row. *Using the example above the most historically dated row is: **August 1, 2006**.*

Details Find | View 1 | First | 1-2 of 2 | Last

| | | |
|-------------------------------|---|---|
| *Issue Date: | <input type="text" value="06/01/2010"/>  |   |
| License: | ASCEPM | AA Certif Project Management |
| *Status: | Active  | |
| Country: | <input type="text" value="USA"/>  | United States |
| State: | <input type="text"/>  | |
| Type of Restriction: | 0-None  | |
| | <input type="checkbox"/> Renewal In Progress | |
| | <input type="checkbox"/> License Verified | |
| Expiration Date: | <input type="text"/>  | |
| | <input type="checkbox"/> Qualifying | |
| License/Certification Number: | <input type="text"/> |  |
| Issued By: | <input type="text"/> |  |

| | | |
|-------------------------------|--|---|
| *Issue Date: | <input type="text" value="08/01/2006"/>  |   |
| License: | ASCEPM | AA Certif Project Management |
| *Status: | Active  | |
| Country: | <input type="text" value="USA"/>  | United States |
| State: | <input type="text"/>  | |
| Type of Restriction: | 0-None  | |
| | <input type="checkbox"/> Renewal In Progress | |
| | <input type="checkbox"/> License Verified | |
| Expiration Date: | <input type="text"/>  | |
| | <input type="checkbox"/> Qualifying | |
| License/Certification Number: | <input type="text"/> |  |
| Issued By: | <input type="text"/> |  |



Licenses and Certifications

- A new License/Certification record is created with the historical date populated in the Issue Date field. The Details box will display "1 of 3" in the upper right corner of the record. Any of the fields that were populated on the historical dated row will be brought forward and populated on the new row.

Details Find | View All First 1 of 3 Last

*Issue Date: 06/01/2010 ⓘ

License: ASCEPM AA Certif Project Management

*Status: Active ▾

Country: USA ⓘ United States

State: ⓘ

Type of Restriction: 0-None ▾

Renewal In Progress

License Verified

Expiration Date: ⓘ

Qualifying

License/Certification Number: ⓘ

Issued By: ⓘ

Details Find | View All First 2 of 3 Last

*Issue Date: 08/01/2008 ⓘ

License: ASCEPM AA Certif Project Management

*Status: Active ▾

Country: USA ⓘ United States

State: ⓘ

Type of Restriction: 0-None ▾

Renewal In Progress

License Verified

Expiration Date: ⓘ

Qualifying

License/Certification Number: ⓘ

Issued By: ⓘ

Licenses and Certifications

Details Find | View All First 3 of 3 Last

*Issue Date: 08/01/2008

License: ASCEPM AA Certif Project Management

*Status: Active

Country: USA United States

State:

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date:

Qualifying

License/Certification Number:

Issued By:

7. Adjust the Issue Date of the new row to reflect the date the license/certificate was effective. *Using the example provided above, the new Issue Date is: **July 1, 2008***

Details Find | View All First 2 of 3 Last

*Issue Date: 07/01/2008

License: ASCEPM AA Certif Project Management

*Status: Active

Country: USA United States

State:

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date:

Qualifying

License/Certification Number:

Issued By:

8. Complete the additional fields according to the instructions in section [‘4.3. Adding a New License or Certification’](#).
9. Click OK to return to the Person Profile page.

Licenses and Certifications

10. Click the Save button located at the bottom of the Person Profile page to commit the entry.

NOTE: Once the record is saved, the License/Certificate Code cannot be changed

11. Click on “Return to Search” to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.5.2 Adding a Historical Dated Row End-Stack

Inserting a row end-stack is the process of adding a row **AT THE END** of one or multiple existing records. For example, if the user is entering a license/certification with a January 1, 2001 Effective Date and two licenses/certifications currently exist with the Effective Dates of June 1, 2003 and April 1, 2002 the user will be required to enter the January 2001 row **end-stack**.

Follow the following steps to enter a historical dated license/certification end-stack:

1. Follow the instructions from section ‘[4.1. Locating the Member](#)’ to search for the member’s record.
2. Click the Qualifications tab and search for the Licenses & Certifications content section. A list of the member’s current licenses/certifications will display under the Licenses & Certifications content section
3. In the License and Certification column, click on the existing license/certification record in which a historical dated row will be entered.



| ID | License | Qualifying | Expiration Date | View History | |
|--------|--|--------------------------|-----------------|---|---|
| ASCEPM | AA Certif Project Management | <input type="checkbox"/> | |  |  |
| ATP | Airline Transport Pilot | <input type="checkbox"/> | | |  |
| IRM | INFORMATION RESOURCE MGMT | <input type="checkbox"/> | |  |  |

The user will be directed to the “Update Licenses & Certifications” page.

4. Click "View All" in the top right corner of the Details bar to view all current rows on the member's record.

Person Profile

Update Licenses & Certifications

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

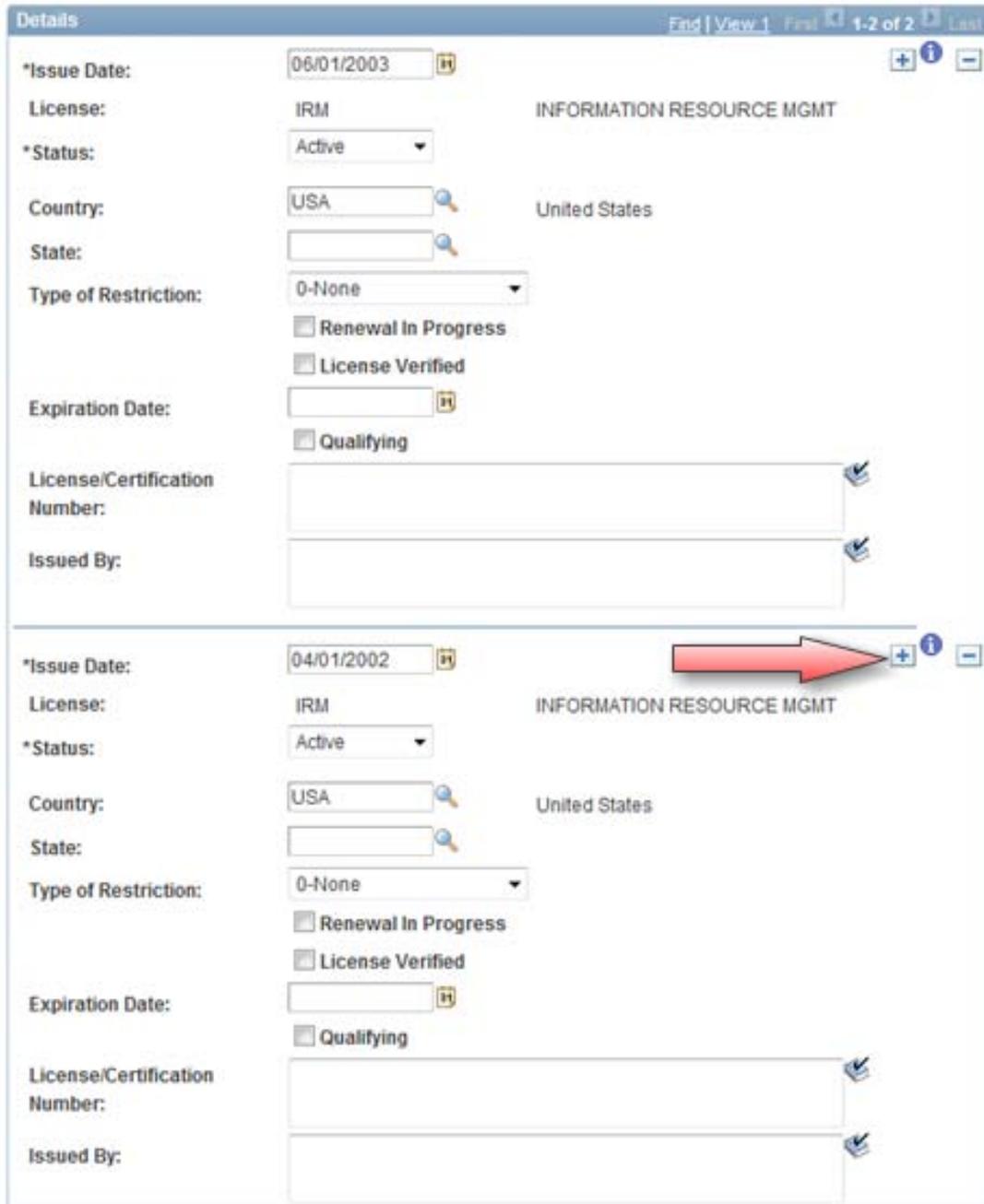
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details  View All First 1 of 2 Last

| | | | | |
|-------------------------------|--|---------------------------|---|---|
| *Issue Date: | 06/01/2003 | + | i | - |
| License: | IRM | INFORMATION RESOURCE MGMT | | |
| *Status: | Active | | | |
| Country: | USA | United States | | |
| State: | | | | |
| Type of Restriction: | 0-None | | | |
| | <input type="checkbox"/> Renewal In Progress | | | |
| | <input type="checkbox"/> License Verified | | | |
| Expiration Date: | | | | |
| | <input type="checkbox"/> Qualifying | | | |
| License/Certification Number: | <input type="text"/> | | | |
| Issued By: | <input type="text"/> | | | |

Licenses and Certifications

5. Click the  sign located on the most historically dated row. *Using the example above the most historically dated row is: April 1, 2002.*



The screenshot displays two panels of license details. The top panel shows a license issued on 06/01/2003, with details including License: IRM, Status: Active, Country: USA, and Type of Restriction: 0-None. The bottom panel shows a license issued on 04/01/2002, with identical details. A red arrow points to the plus sign icon on the right side of the bottom panel's 'Issue Date' field.

| Field | Value |
|-------------------------------|------------|
| *Issue Date: | 06/01/2003 |
| License: | IRM |
| *Status: | Active |
| Country: | USA |
| State: | |
| Type of Restriction: | 0-None |
| Expiration Date: | |
| License/Certification Number: | |
| Issued By: | |

| Field | Value |
|-------------------------------|------------|
| *Issue Date: | 04/01/2002 |
| License: | IRM |
| *Status: | Active |
| Country: | USA |
| State: | |
| Type of Restriction: | 0-None |
| Expiration Date: | |
| License/Certification Number: | |
| Issued By: | |

Licenses and Certifications

- A new License and Certification record is created with the historical date populated in the Issue Date field. The Details box will display "1 of 3" in the upper right corner of the record. Any of the fields that were populated on the historical dated row will be brought forward and populated on the new row.

Details 1 of 3 Last

*Issue Date: 08/01/2003

License: IRM INFORMATION RESOURCE MGMT

*Status: Active

Country: USA United States

State:

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date:

Qualifying

License/Certification Number:

Issued By:

Details Find | View All First 2 of 3 Last

*Issue Date: 04/01/2002

License: IRM INFORMATION RESOURCE MGMT

*Status: Active

Country: USA United States

State:

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date:

Qualifying

License/Certification Number:

Issued By:

Licenses and Certifications

Details Find | View All | First 3 of 3 Last

*Issue Date: 04/01/2002 ⓘ

License: IRM INFORMATION RESOURCE MGMT

*Status: Active ▾

Country: USA ⓘ United States

State: ⓘ

Type of Restriction: 0-None ▾

Renewal In Progress

License Verified

Expiration Date: ⓘ

Qualifying

License/Certification Number: ⓘ

Issued By: ⓘ

7. Adjust the Issue Date to reflect the date of the new license/certification being entered on the record. Using the example provided above, the new Issue Date is: **January 1, 2001**

Details Find | View All | First 3 of 3 Last

*Issue Date: 01/01/2001 ⓘ

License: IRM INFORMATION RESOURCE MGMT

*Status: Active ▾

Country: USA ⓘ United States

State: ⓘ

Type of Restriction: 0-None ▾

Renewal In Progress

License Verified

Expiration Date: ⓘ

Qualifying

License/Certification Number: ⓘ

Issued By: ⓘ

8. Complete the additional fields according to the instructions in section [4.3. Adding a New License or Certification](#)
9. Click OK. After you click OK you will be returned to the Person Profile page.

10. Click the Save button located at the bottom of the Person Profile page to commit the entry.

NOTE: Once the record is saved, the License/Certificate Code cannot be changed.

11. Click on “Return to Search” to enter information on a different Officer or [Home](#) to return to the Portal Homepage.

5 Correcting a License or Certification Record

5.1 Correcting a License or Certification Code

If the License or Certification Code needs to be corrected, the user **MUST** first delete the record and reenter it using the correct License/Certification Code. Directions on how to delete a record can be found in section [‘6. Deleting a License or Certification’](#).

5.2 Correcting other License or Certification Data

1. Follow the instructions from section [‘4.1. Locating the Member’](#) to search for the member’s record.
2. Change/correct the appropriate fields.
3. Click OK to return to the Person Profile page.
4. Click Save at the bottom of the Person Profile page to commit the changes.

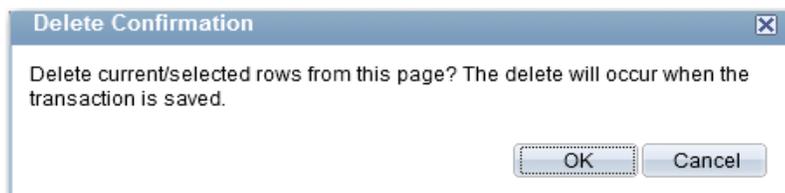
6 Deleting a License or Certification

As with any delete function, use extreme caution when performing delete transactions. It is possible to delete the wrong record or records, especially if the member has multiple instances of the license/certification. If a record is erroneously deleted, it will have to be recreated.

Note: If this is a license/certification that has just been added, the  button used to delete some records will not appear until the user leaves the page and returns. The easiest resolution is to click “Return to Search” and then re-enter the member’s profile. This is a nuance of the application.

6.1 Deleting a Single License or Certification

1. Follow the instructions in section [‘4.1. Locating the Member’](#) to search for the member’s record.
2. Click the Qualifications tab and search for the Licenses & Certification content section.
3. Click the trashcan on the license or certification row to be deleted.
4. Click OK to confirm the deletion.



5. Click OK to return to the Person Profile page.

- Click Save at the bottom of the Person Profile page to commit the changes.

6.2 Deleting One License and Certification of Multiple Instances

- To delete one license/certification of multiple records of the same type, select the License/Certification.

| Licenses & Certifications (Approval Not Required) | | | | | |
|---|--|--------------------------|-----------------|--------------|--|
| ID | License | Qualifying | Expiration Date | View History | |
| ASCEPM | AA Certif Project Management | <input type="checkbox"/> | | | |
| ATP | Airline Transport Pilot | <input type="checkbox"/> | | | |
| IRM | INFORMATION RESOURCE MGMT | <input type="checkbox"/> | | | |

[+ Add New Licenses & Certifications](#)

- Scroll through the records using the arrows to find the correct record to delete.

Person Profile

Update Licenses & Certifications

Empl ID:

Profile Type:

PERSON

Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details First 1-3 of 3 Last

*Issue Date:

License: ASCEPM AA Certif Project Management

*Status:

Country: United States

State:

Type of Restriction:

Renewal In Progress

License Verified

Expiration Date:

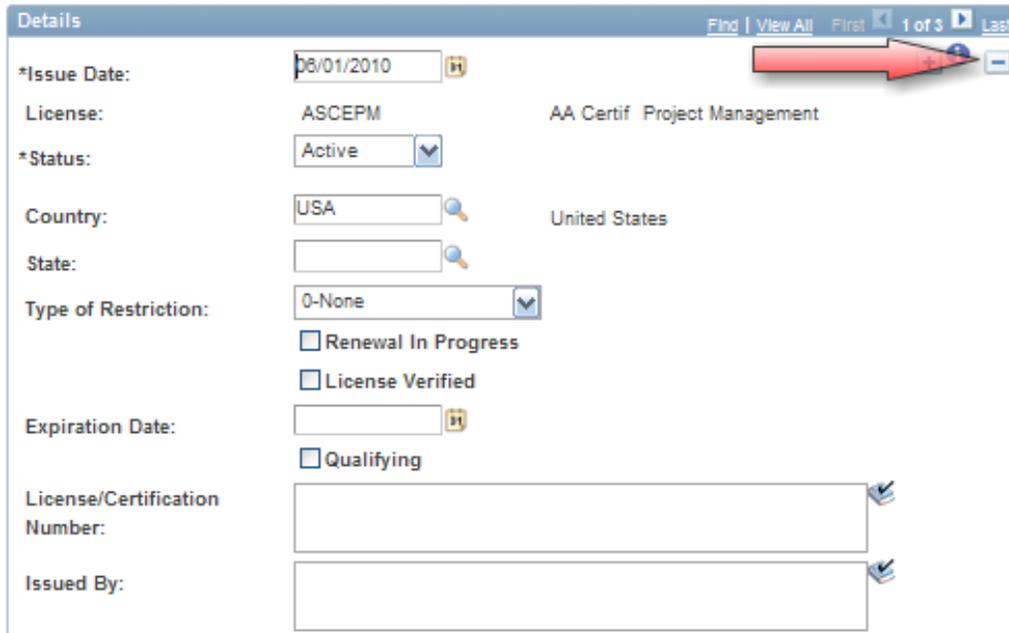
Qualifying

License/Certification Number:

Issued By:

Users can also “View All” records to search for the record to be deleted.

- Once the correct record has been located, click the  button in the upper right corner of the record.

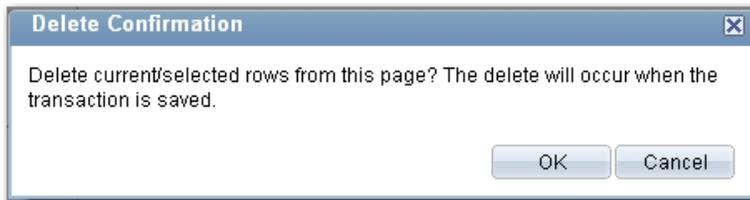


The screenshot shows a 'Details' window for a license record. The fields are as follows:

- *Issue Date: 06/01/2010
- License: ASCEPM
- *Status: Active
- Country: USA
- State: (empty)
- Type of Restriction: 0-None
- Expiration Date: (empty)
- License/Certification Number: (empty)
- Issued By: (empty)

Additional information shown: AA Certif Project Management, United States. There are checkboxes for 'Renewal In Progress', 'License Verified', and 'Qualifying', all of which are unchecked. A red arrow points to a trash can icon in the top right corner of the form.

- Click OK to confirm the deletion



The dialog box contains the following text:

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

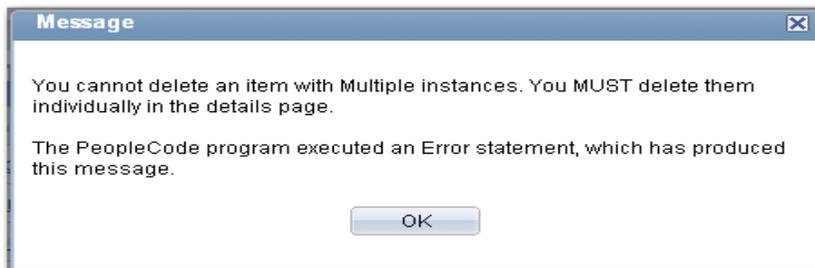
Buttons: OK, Cancel

- Click OK to return to the Person Profile page.
- Click Save at the bottom of the Page Profile to commit the changes.

6.3 Deleting All Records for a License or Certification Type

Each record must be deleted individually using the steps outlined in section '[6.2. Deleting One License or Certification of Multiple Instances](#)'. To prevent unintentional deletions of licenses/certifications, the trashcan functionality for multiple instances has been disabled.

The following message will appear if you attempt to delete multiple instances at one time:



The message dialog box contains the following text:

You cannot delete an item with Multiple instances. You MUST delete them individually in the details page.

The PeopleCode program executed an Error statement, which has produced this message.

Button: OK

This page left blank intentionally

UNITED STATES COAST GUARD



Person Profiles

Professional Memberships

03/5/2012

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Step-by step instructions on adding, updating and deleting Membership data in Direct Access.

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1 Introduction

Individual USCG professional memberships are maintained in the Person Profile of Direct Access. Authorized users enter and maintain this information. The information is available to USCG members via self-service. This section provides the procedure for adding, updating, and deleting an individual Membership (non self-service) via the Person Profile page.

2 Portal Navigation

The user can navigate to the Person Profiles page using the path below. At any time, if a user needs to return to the home screen, the user can click the “Home” link in the upper right-hand corner of the window.

Enterprise Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Memberships: This navigation takes the user to the Person Profile screen. Memberships are recorded on the Person Profile screen.

3 Wildcard Search

Direct Access supports the use of three wildcard features when searching for data. The wildcards can be helpful in finding the exact information that user wants to process. The following are the supported standard wildcard features.

| Character | Function |
|------------------|--|
| % (percent sign) | Match one or more characters. |
| _ (underscore) | Match any single character. |
| \ (back slash) | Escape character – don’t treat the next character as a wildcard. |

When attempting to search for a member, you may use the “wildcard” search feature. One commonly used wildcard is the “_” sign. The use of this sign represents a single letter instead of a group of letters. For example, if you would like to see all the members whose last names contain the letters “C”, “H” and “N”, in that order, the “_” wildcard would be used to represent a single letter between the characters in which it is placed. An example of the search results when a “_” is used is located below.

The screenshot shows a search interface with the following search criteria:

- Maximum number of rows to return (up to 300): 300
- Empl ID: begins with
- Profile Type: begins with
- Name: begins with
- Last Name: begins with CH_N
- Alternate Character Name: begins with
- Include History Correct History Case Sensitive

Buttons: Search, Clear, Basic Search, Save Search Criteria

Search Results
Only the first 300 results of a possible 489 can be displayed. Enter more search key information and search again to re

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|-------------|--------------------------|
| | AWARDS COORD | | CHANDLER | (blank) |
| | PERSON | | CHANDLER | (blank) |
| | PERSON | | CHANDRASENA | (blank) |
| | PERSON | | CHANES | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |
| | RETIREE | | CHANEY | (blank) |
| | PERSON | | CHANEY | (blank) |

Another wildcard that is commonly used is the “%” sign. This wildcard is used to represent multiple characters. For example, if you would like to see all members whose last names contain the letters “C”, “H”

Professional Memberships User Guide

and “N”, regardless of the order of the letters in the name, the “%” wildcard should be used. Below is an illustration of this example.

The screenshot shows a search interface with two tabs: "Find an Existing Value" and "Add a New Value". The "Find an Existing Value" tab is active. The search criteria are as follows:

- Maximum number of rows to return (up to 300): 300
- Empl ID: begins with []
- Profile Type: begins with []
- Name: begins with []
- Last Name: begins with [CH%N]
- Alternate Character Name: begins with []

There are checkboxes for "Include History" (unchecked), "Correct History" (checked), and "Case Sensitive" (unchecked). Buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria" are visible.

Search Results

Only the first 300 results of a possible 1459 can be displayed. Enter more search key information and see [View All](#) First 1-100 of 300 Last

| Empl ID | Profile Type | Name | Last Name | Alternate Character Name |
|---------|--------------|------|------------|--------------------------|
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | RETIREE | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | AWARDS COORD | | CHACON | (blank) |
| | PERSON | | CHACON | (blank) |
| | PERSON | | CHADBRAND | (blank) |
| | PERSON | | CHADBOURNE | (blank) |

4 Entering a Membership

When information about a member’s Membership is received and ready to be entered into Direct Access, navigate to the following page:

Portal Link: Person Profile

Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

4.1 Locating the Member

1. Use the Search record to pull up the member’s Person Profile using the member’s EMPLID or name.

HINT: When attempting to search for a member, you may use the Direct Access “wildcard” search feature. Refer to section [3. Wildcard Search](#) for more information.

The screenshot shows the "Person Profiles" search interface. The search criteria are as follows:

- Maximum number of rows to return (up to 300): 300
- Empl ID: begins with []
- Profile Type: begins with []
- Name: begins with []
- Last Name: begins with []
- Alternate Character Name: begins with []

There are checkboxes for "Include History" (unchecked), "Correct History" (checked), and "Case Sensitive" (unchecked). Buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria" are visible. A red arrow points to the "Search" button.

2. Click the Search button. If the search returns more than one record, be sure to select the correct member’s record that has “PERSON” in the Profile Type column.

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Note: If a member has both a Person Profile and an Awards Coordinator Profile, then that member is a PHS officer who is or has been assigned to the Coast Guard for duty. Use the “PERSON” profile to record the data.

4.2 Viewing Memberships

1. Click the Qualifications tab.

Person Profile

Empl ID: [redacted] [View Profile](#)

Profile Type: PERSON Person

*Profile Status: Active

*Description: [redacted]

Profile Actions: <Select Action>

Competencies **Qualifications** Education

| ID | Competency | *Effective Date | Evaluation Type | Proficiency | |
|------------|------------|-----------------|-------------------|-------------|--|
| [redacted] | [redacted] | 02/01/1989 | Approved/Official | Good | |
| [redacted] | [redacted] | 02/01/1989 | Approved/Official | Good | |
| [redacted] | [redacted] | 06/01/2002 | Approved/Official | Good | |
| [redacted] | [redacted] | 10/06/2008 | Approved/Official | Good | |
| [redacted] | [redacted] | 06/01/2002 | Approved/Official | Good | |

[+ Add New Competencies](#)

A list of the member’s current Memberships will be displayed in the Memberships content section.

| ID | Membership | View History | |
|----------|---|--------------|--|
| INFORMS | Inst for OR & Mgmt Sciences | | |
| MORS | Military Op Research Society | | |
| TOASTMST | Toastmasters | | |

NOTE: Memberships with the same Membership Code are grouped together. The icon in the “View History” column signifies that the member has received the membership more than once. Click on the icon to view all instances of the membership.

2. If a member has more than five memberships, only the first five will be displayed. Click on the View All link to display all of the member’s memberships. Check to see if the membership, with a different effective date, has previously been entered on the member’s record.

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| Memberships (Approval Not Required) | | | |
|-------------------------------------|---|---|---|
| ID | Membership | View History | |
| ACAD | CG Academy Alumni Assoc |  |  |
| ASSE | Amer Society Of Safety Eng | |  |
| CESOC | Society of Civil Engineers | |  |
| INFORMS | Inst for OR & Mgmt Sciences | |  |
| MORS | Military Op Research Society | |  |

3. If the membership is a new membership, skip to section [“4.3. Adding a New Membership”](#). If the membership currently exists, proceed to section [“4.4. Adding a Previously Granted Membership of the Same Type”](#). To add a historical dated membership, proceed to section [“4.5. Adding a Historical Dated Membership of the Same Type”](#).

4.3 Adding a New Membership

Follow the steps below to add a new membership to a member’s profile.

1. To add a new membership, click on the Add New Memberships link located below the Memberships content section.

| Memberships (Approval Not Required) | | | |
|-------------------------------------|---|---|---|
| ID | Membership | View History | |
| ACAD | CG Academy Alumni Assoc |  |  |
| ASSE | Amer Society Of Safety Eng | |  |
| CESOC | Society of Civil Engineers | |  |
| INFORMS | Inst for OR & Mgmt Sciences | |  |
| MORS | Military Op Research Society | |  |

[+ Add New Memberships](#) 

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2. On the “Add New Memberships” page, enter the following fields:

| Field | Description/Instructions |
|--|---|
| *Membership Date (Required) | Enter the date the membership was effective (also known as the Effective Date). Click on the  icon to choose a date or enter the date directly in the field (dates must be in MM/DD/YYYY format). |
| *Membership File that have the | <p>Click the  to search for valid memberships. Click Lookup to display available membership codes. From the Search Results list, you can choose a specific row of data. A single click on any column in that row selects the membership.</p> <p>Users may narrow the search by using the following fields and then clicking “Lookup”:</p> <ul style="list-style-type: none"> ▪ Content Item ID: Enter all or part of the membership code ▪ Content Group Type: Click on the magnifying glass to select the type of membership ▪ Content Group: N/A ▪ Description: Enter all or part of the title of the membership <p>If the membership you looking for is not listed, a request may be made to have it added. Submit your request via memo to:</p> <p>Commanding Officer (ISA) Coast Guard Personnel Service Center 444 SE Quincy St. Topeka KS 66683-3591</p> <p>Please include a brief description of the membership’s purpose and how it benefits the member’s Coast Guard career.</p> |
| Membership Begin Date | Enter the beginning date of the membership period or position/role. This is not a required field so it may be left blank. |
| Membership End Date | Enter the end date of the membership period or position/role period. This is not a required field so it may be left blank. |
| Mandate | Enter the mandate or activity. This is not a required field so it may be left blank. |
| Mandate Position | Enter the Position/Role (e.g., Vice President, Member, Secretary/Treasurer). This is not a required field so it may be left blank. |
| OK | <p>Click OK to Save the page.</p> <p>NOTE: The entry will not be saved to the Person Profile until you click SAVE at bottom of the Person Profile page</p> |

After you click OK you will be returned to the Person Profile page. The new membership will be displayed in the summary grid.

3. Click the Save button located at the bottom of the Person Profile page to commit the entry.

NOTE: If the wrong membership was selected, delete it and repeat Step [4.3 ‘Adding a New Membership’](#).

4. Click on “Return to Search” to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.4 Adding a Previously Granted Membership of the Same Type

The system allows a membership with different effective dates to be entered on a member’s record multiple times. Adding a new effective dated row involves adding a new row to the membership’s history.

NOTE: The system allows a membership with different effective dates to be entered on a member’s record multiple times. Adding a new effective dated row involves adding a new row to the membership data history.

1. Click the Qualifications tab. A list of the member’s current memberships will display under the Memberships content section
2. In the Membership column, click on the existing membership record.

When a membership is entered multiple times, only the most recent entry will be displayed in most DA I/8.0 applications and reports

| Memberships (Approval Not Required) | | | |
|-------------------------------------|---|--------------|--|
| ID | Membership | View History | |
| ACAD | CG Academy Alumni Assoc | | |
| ASSE | Amer Society Of Safety Eng | | |
| CESOC | Society of Civil Engineers | | |
| INFORMS | Inst for OR & Mgmt Sciences | | |
| MORS | Military Op Research Society | | |

[+ Add New Memberships](#)

The user will be directed to the “Update Memberships” page.

Person Profile

Update Memberships

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

| Details | |
|---------------------|-----------------------------------|
| *Membership Date: | 01/26/2012 |
| *Membership: | CESOC Society of Civil Engineers |
| *Status: | Active |
| Mandate Begin Date: | <input type="text"/> |
| Mandate End Date: | <input type="text"/> |
| Mandate: | <input type="text"/> |
| Mandate Position: | <input type="text"/> |

IMPORTANT: The system does not allow the entry of duplicate entries in a member’s profile. If you enter a membership with a membership date (effective date) that already exists in the member’s profile, you will receive an error message. You must indicate a different membership date to resolve the error

Professional Memberships User Guide

- Click on the  sign in the top right corner of the Detail box to insert a new effective dated row.

Person Profile

Update Memberships

Empl ID:

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details End | View All | First 1 of 1 | Last

| | | | |
|---------------------|---|---|---|
| *Membership Date: | <input type="text" value="01/26/2012"/> |  |   |
| *Membership: | <input type="text" value="CESOC"/> |  | Society of Civil Engineers |
| *Status: | <input type="text" value="Active"/> |  | |
| Mandate Begin Date: | <input type="text"/> |  | |
| Mandate End Date: | <input type="text"/> |  | |
| Mandate: | <input type="text"/> | |  |
| Mandate Position: | <input type="text"/> | |  |

- A new membership record is created with the current date populated in the Membership Date field. The Details box will display “1 of x” in the upper right corner of the record. Any fields that were populated on the previous membership row will be brought forward and populated on the new row.

Person Profile

Update Memberships

Empl ID:

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details End |  1 of 2 | Last

| | | | |
|---------------------|---|---|---|
| *Membership Date: | <input type="text" value="01/26/2012"/> |  |    |
| Membership: | <input type="text" value="CESOC"/> |  | Society of Civil Engineers |
| *Status: | <input type="text" value="Active"/> |  | |
| Mandate Begin Date: | <input type="text"/> |  | |
| Mandate End Date: | <input type="text"/> |  | |
| Mandate: | <input type="text"/> | |  |
| Mandate Position: | <input type="text"/> | |  |

- Complete the additional fields as indicated in section [‘4.3 Adding a New Membership’](#).

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- Click OK to return to the Person Profile page. Upon returning to the Person Profile page, the multiple records icon  will be displayed on the row for the newly added membership indicating there are multiple rows for the membership.



| ID | Membership | View History |
|---------|---|---|
| ACAD | CG Academy Alumni Assoc |  |
| ASSE | Amer Society Of Safety Eng | |
| CESOC | Society of Civil Engineers |  |
| INFORMS | Inst for OR & Mgmt Sciences | |
| MORS | Military Op Research Society | |

- Click the Save button located at the bottom of the Person Profile page to commit the entry.

NOTE: If the wrong membership was selected, delete it and repeat Step [4.4 'Adding a Previously Granted Membership of the Same Type'](#).

- Click on "Return to Search" to enter information on a different member or [Home](#) to return to the Portal Homepage.

4.5 Adding a Historical Dated Membership of the Same Type

The Effective Date of the membership being entered cannot be prior to the Effective Date of the existing membership. If the Effective Date of the membership being entered is prior to the Effective Date of the membership that has already been entered, you will need to enter the new membership below the membership that already exists and adjust the Effective Dates of both membership entries **PRIOR** to saving the page.

4.5.1 Adding a Historical Dated Row Mid-Stack

Inserting a row mid-stack is the process of adding a row **BETWEEN** two existing records. For example, if the user is entering a membership with a July 1, 2008 Effective Date and two memberships currently exist with the Effective Dates of June 1, 2009 and August 1, 2007, the user will be required to enter the July 2008 row **mid-stack**.

Follow the following steps to enter a historical dated membership mid-stack:

- Follow the instructions in section ['4.1. Locating the Member'](#), to search for the member's record.
- Click the Qualifications tab and search for the Membership content section. A list of the member's current memberships will display under the Memberships content section.

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3. In the Membership column, click on the existing membership record in which a historical dated row will be entered.

| Memberships (Approval Not Required) | | | |
|-------------------------------------|---|---|---|
| ID | Membership | View History | |
| ASQ | American Society for Quality ← |  |  |
| INFORMS | Inst for OR & Mgmt Sciences | |  |
| MORS | Military Op Research Society | |  |
| TOASTMST | Toastmasters |  |  |

The user will be directed to the “Update Memberships” page.

4. Click “View All” in the top right corner of the Details bar to view all current rows on the member’s record.

Person Profile

Update Memberships

Empl ID: [REDACTED] [REDACTED]
Profile Type: PERSON Person
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details | [View All](#) | First | 1 of 2 | Last

*Membership Date: 06/01/2009   

Membership: ASQ American Society for Quality

*Status: Active

Mandate Begin Date: 

Mandate End Date: 

Mandate: 

Mandate Position: 

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5. Click the  sign located on the most historically dated row. *Using the example above the most historically dated row is: **August 1, 2007**.*

Person Profile

Update Memberships

Empl ID:

XXXXXXXXXX

XXXXXXXXXX

Profile Type:

PERSON

Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View: 1 First 1-2 of 2 Last

| | | | |
|---------------------|------------|---|---|
| *Membership Date: | 06/01/2009 |  |   |
| Membership: | ASQ | American Society for Quality | |
| *Status: | Active | | |
| Mandate Begin Date: | |  | |
| Mandate End Date: | |  | |
| Mandate: | | |  |
| Mandate Position: | | |  |

| | | | |
|---------------------|------------|---|---|
| *Membership Date: | 08/01/2007 |  |   |
| Membership: | ASQ | American Society for Quality | |
| *Status: | Active | | |
| Mandate Begin Date: | |  | |
| Mandate End Date: | |  | |
| Mandate: | | |  |
| Mandate Position: | | |  |



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- A new membership record is created with the historical date populated in the Membership Date field. The Details box will display “1 of 3” in the upper right corner of the record. Any of the fields that were populated on the prior row will be brought forward and populated on the new row.

The screenshot shows a 'Details' window with a header bar containing 'Find | View 1 First 1-3 of 3 Last'. The window displays three membership records, each with the following fields:

- *Membership Date:** 06/01/2009 (top record), 08/01/2007 (middle and bottom records)
- Membership:** ASQ American Society for Quality
- *Status:** Active
- Mandate Begin Date:** (empty)
- Mandate End Date:** (empty)
- Mandate:** (empty)
- Mandate Position:** (empty)

Each record has a '+', 'i', and '-' icon in the top right corner. The '1-3 of 3' text in the header indicates that the first record is currently selected.

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- Adjust the Membership Date of the new row to reflect the date the membership was effective. *Using the example provided above, the new Membership Date is: **July 1, 2008***

The screenshot shows a 'Details' form for Professional Memberships. The form is divided into three rows, each representing a different membership record. The first row has a Membership Date of 06/01/2009. The second row has a Membership Date of 07/01/2008, with a red arrow pointing to the date field. The third row has a Membership Date of 08/01/2007. Each row includes fields for Membership (ASQ), Status (Active), Mandate Begin Date, Mandate End Date, Mandate, and Mandate Position. The form is titled 'Details' and has navigation buttons at the top.

- Complete the additional fields according to the instructions in section ['4.3 Adding a New Membership'](#).
 - Click OK to return to the Person Profile page.
 - Click the Save button located at the bottom of the Person Profile page to commit the entry.
- NOTE:** Once the record is saved, the Membership Code cannot be changed
- Click on "Return to Search" to enter information on a different member or [Home](#) to return to the Portal Homepage.

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4.5.2 Adding a Historical Dated Row End-Stack

Inserting a row end-stack is the process of adding a row **AT THE END** of one or multiple existing records. For example, if the user is entering a membership with a January 1, 2001 Effective Date and two memberships currently exist with the Effective Dates of June 1, 2003 and April 1, 2002 the user will be required to enter the January 2001 row **end-stack**.

Follow the following steps to enter a historical dated membership end-stack:

1. Follow the instructions from section '[4.1. Locating the Member](#)' to search for the member's record.
2. Click the Qualifications tab and search for the Memberships content section. A list of the member's current memberships will display under the Memberships content section
3. In the Membership column, click on the existing membership record in which a historical dated row will be entered.



| ID | Membership | View History |
|----------|---|---|
| ASCM | American Society Mil Comprtr |  |
| INFORMS | Inst for OR & Mgmt Sciences |  |
| MORS | Military Op Research Society |  |
| TOASTMST | Toastmasters |  |

The user will be directed to the "Update Memberships" page.

4. Click "View All" in the top right corner of the Details bar to view all current rows on the member's record.



Details

*Membership Date: 06/01/2003

Membership: ASCM American Society Mil Comprtr

*Status: Active

Mandate Begin Date:

Mandate End Date:

Mandate:

Mandate Position:

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5. Click the  sign located on the most historically dated row. *Using the example above the most historically dated row is: **April 1, 2002.***

Person Profile

Update Memberships

Empl ID:

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View 1 First 1-2 of 2 Last

| | | |
|---------------------|---|---|
| *Membership Date: | <input type="text" value="06/01/2003"/> |    |
| Membership: | ASCM | American Society Mil Comprtr |
| *Status: | Active | |
| Mandate Begin Date: | <input type="text"/> | |
| Mandate End Date: | <input type="text"/> | |
| Mandate: | <input type="text"/> |  |
| Mandate Position: | <input type="text"/> |  |

| | | |
|---------------------|---|---|
| *Membership Date: | <input type="text" value="04/01/2002"/> |    |
| Membership: | ASCM | American Society Mil Comprtr |
| *Status: | Active | |
| Mandate Begin Date: | <input type="text"/> | |
| Mandate End Date: | <input type="text"/> | |
| Mandate: | <input type="text"/> |  |
| Mandate Position: | <input type="text"/> |  |

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- A new Membership record is created with the historical date populated in the Membership Date field. The Details box will display "1 of 3" in the upper right corner of the record. Any of the fields that were populated on the historical dated row will be brought forward and populated on the new row.

The screenshot displays three stacked 'Details' boxes for membership records. The top box shows a record with a Membership Date of 06/01/2003. The middle box, highlighted with a red border, shows a record with a Membership Date of 04/01/2002. The bottom box shows another record with a Membership Date of 04/01/2002. Each box contains the following fields:

- *Membership Date:** A date field with a calendar icon.
- Membership:** A text field containing 'ASCM' and 'American Society Mil Comptrlr'.
- *Status:** A dropdown menu set to 'Active'.
- Mandate Begin Date:** A date field with a calendar icon.
- Mandate End Date:** A date field with a calendar icon.
- Mandate:** A text area with a copy icon.
- Mandate Position:** A text area with a copy icon.

The interface also includes a top navigation bar with 'Find | View 1 First 1-3 of 3 Last' and a bottom status bar with '+ i -' icons.

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- Adjust the Membership Date of the **LAST** row to reflect the date of the new membership being entered on the record. *Using the example provided above, the new Membership Date is: **January 1, 2001***

The screenshot displays a 'Details' window with three rows of membership information. Each row includes fields for Membership Date, Membership (ASCM), Status (Active), Mandate Begin Date, Mandate End Date, Mandate, and Mandate Position. The bottom row's Membership Date field is highlighted with a red arrow, indicating the date to be updated to January 1, 2001.

| Membership Date | Membership | Status | Mandate Begin Date | Mandate End Date | Mandate | Mandate Position |
|-----------------|------------|--------|--------------------|------------------|---------|------------------|
| 06/01/2003 | ASCM | Active | | | | |
| 04/01/2002 | ASCM | Active | | | | |
| 01/01/2001 | ASCM | Active | | | | |

- Complete the additional fields according to the instructions in section [‘4.3 Adding a New Membership’](#).
 - Click OK. After you click OK you will be returned to the Person Profile page.
 - Click the Save button located at the bottom of the Person Profile page to commit the entry.
- NOTE:** Once the record is saved, the Membership Code cannot be changed.
- Click on “Return to Search” to enter information on a different Officer or [Home](#) to return to the Portal Homepage.

5 Correcting a Membership Record

5.1 Correcting a Membership Code

If the Membership Code needs to be corrected, the user MUST first delete the membership record and reenter it using the correct Membership Code. Directions on how to delete a record can be found in section '[6. Deleting a Membership](#)'.

5.2 Correcting other Membership Data

1. Follow the instructions from section '[4.1. Locating the Member](#)' to search for the member's record.
2. Change/correct the appropriate fields.
3. Click OK to return to the Person Profile page.
4. Click Save at the bottom of the Person Profile page to commit the changes.

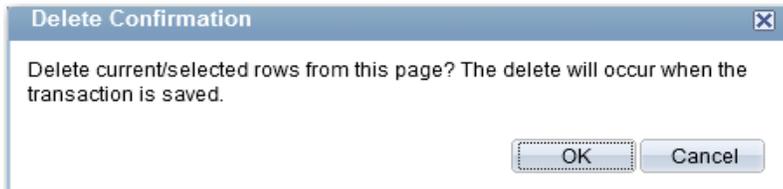
6 Deleting a Membership

As with any delete function, use extreme caution when performing delete transactions. It is possible to delete the wrong record or records, especially if the member has multiple instances of the Membership. If a record is erroneously deleted, it will have to be recreated.

Note: If this is a membership that has just been added, the  button used to delete some records will not appear until the user leaves the page and returns. The easiest resolution is to click "Return to Search" and then re-enter the member's profile. This is a nuance of the application.

6.1 Deleting a Membership

1. Follow the instructions in section '[4.1. Locating the Member](#)' to search for the member's record.
2. Click the Qualifications tab and search for the Memberships content section.
3. Click the trashcan on the membership row to be deleted.
4. Click OK to confirm the deletion.



5. Click OK to return to the Person Profile page.
6. Click Save at the bottom of the Person Profile page to commit the changes.

6.2 Deleting One Membership of Multiple Instances

1. To delete one membership of multiple records of the same type, select the Membership.



| ID | Membership | View History | |
|----------|---|--------------|--|
| ASCM | American Society Mil Comptr | | |
| INFORMS | Inst for OR & Mgmt Sciences | | |
| MORS | Military Op Research Society | | |
| TOASTMST | Toastmasters | | |

2. Scroll through the records using the arrows to find the correct record to delete.

Person Profile

Update Memberships

Empl ID:

Profile Type: PERSON Person

Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

Details Find | View All | Last

*Membership Date:

Membership: ASCM American Society Mil Comptr

*Status: Active

Mandate Begin Date:

Mandate End Date:

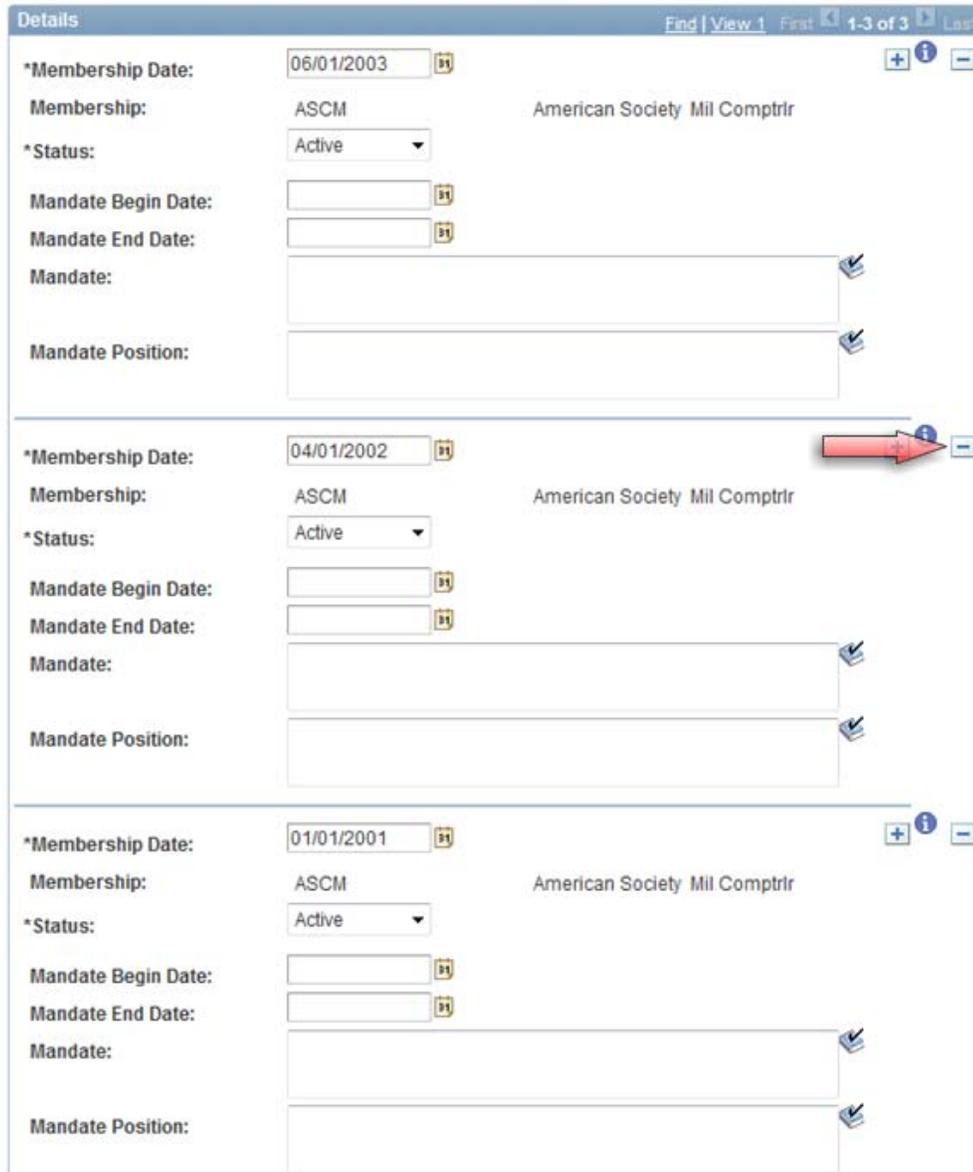
Mandate:

Mandate Position:

Users can also “View All” records to search for the record to be deleted.

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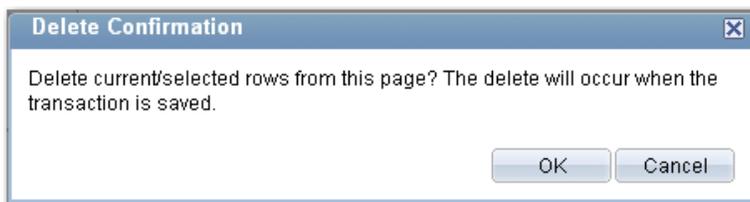
- Once the correct record has been located, click the  button in the upper right corner of the record.



The screenshot displays a table of membership records. Each record has a set of controls in its top right corner: a plus sign, an information icon, and a minus sign. A red arrow points to the minus sign of the second record, which has a membership date of 04/01/2002. The records are as follows:

| Membership Date | Membership | Status |
|-----------------|------------|--------|
| 06/01/2003 | ASCM | Active |
| 04/01/2002 | ASCM | Active |
| 01/01/2001 | ASCM | Active |

- Click OK to confirm the deletion



Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK Cancel

- Click OK to return to the Person Profile page.
- Click Save at the bottom of the Page Profile to commit the changes.

6.3 Deleting All Records for a Membership Type

Each record must be deleted individually using the steps outlined in section “[6.2. Deleting One Membership of Multiple Instances](#)”. To prevent unintentional deletions of memberships, the trash can functionality for multiple instances has been disabled.

The following message will appear if you attempt to delete multiple instances at one time:

