UNITED STATES COAST GUARD

Person Profile

Competencies & Officer Specialty Codes (OCSs)

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

DRAFT

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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

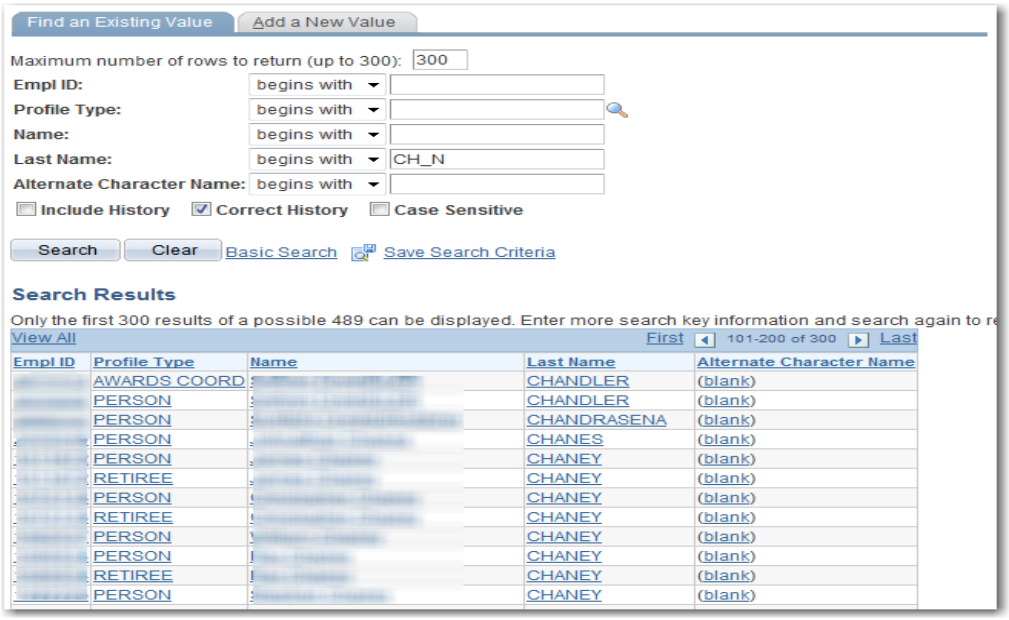
Competencies: This navigation takes the user to the Person Profile screen. competencies and OSC's are recorded on the Person Profile screen.

2 Wildcard Search

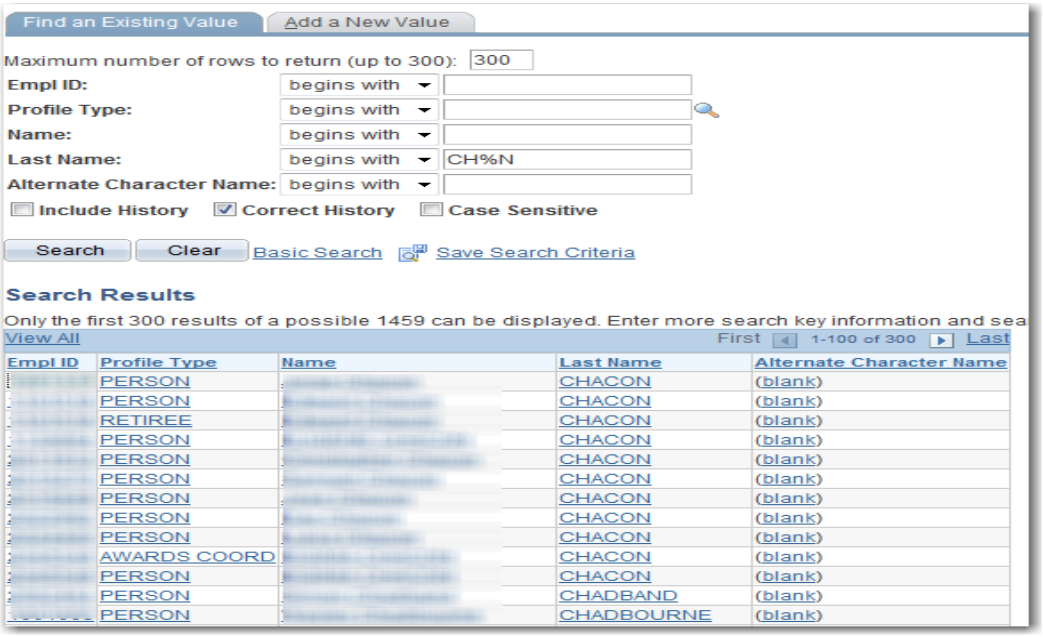
Direct Access supports the use of three wildcard features when searching for data. The wildcards can be helpful in finding the exact information that user wants to process. The following are the supported standard wildcard features.

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.



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.



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

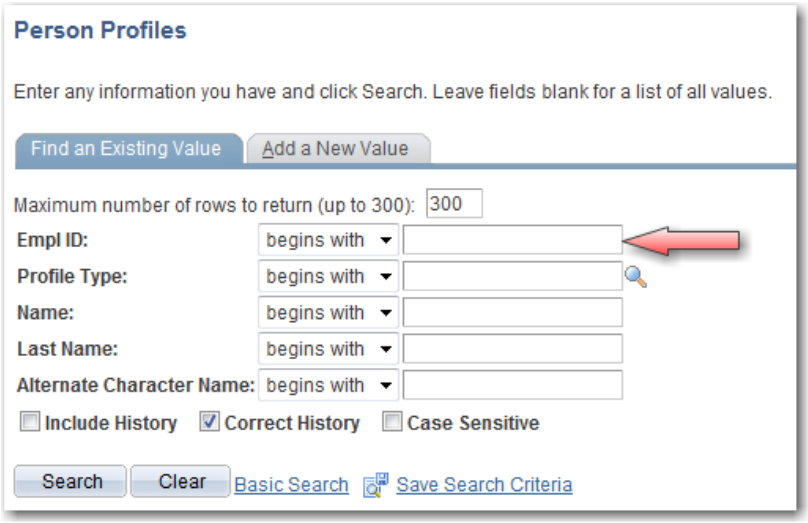
Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

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.

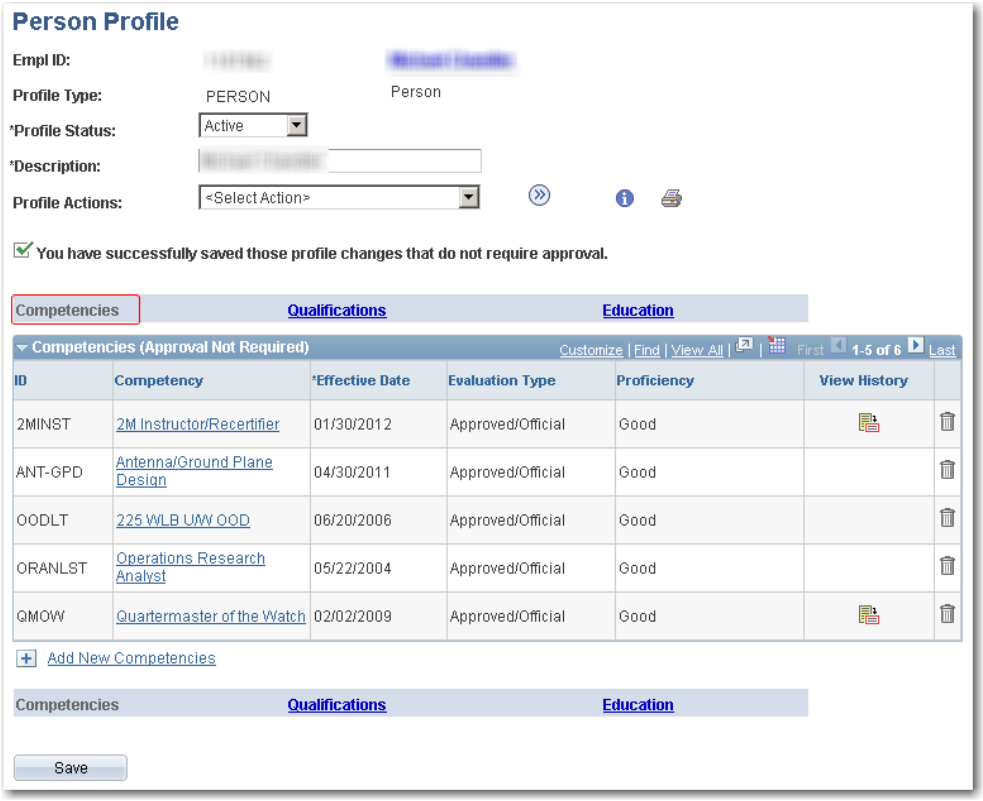
   HINT: When attempting to search for a member, you may use the Direct Access "wildcard" search feature. Refer to section 3. Wildcard Search for further instruction



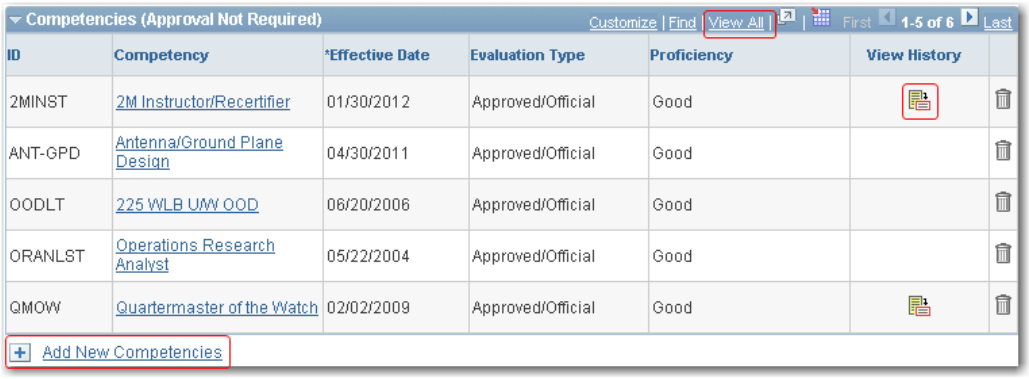
2. Click the Search button. If the search returns more than one record, be sure to select the correct member's record that has "PERSON" in the Profile Type column

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.



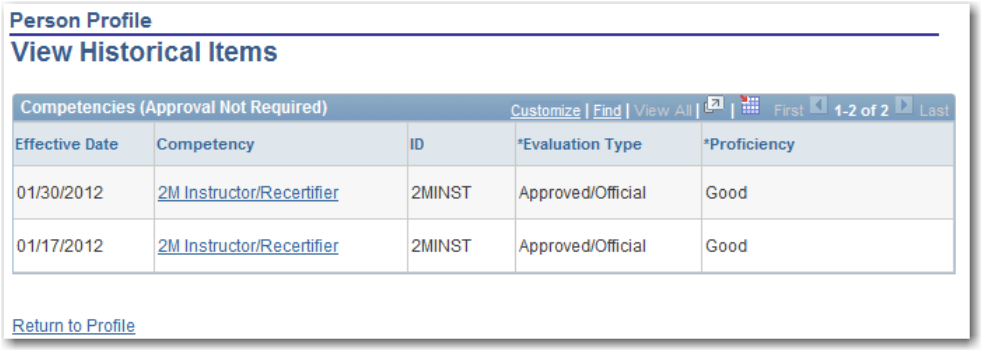
Competencies content section will display under the competencies link. A list of the member's current competencies will display in the section.



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.

4. 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) Customize | Find | View All | First 1-2 of 2 Last

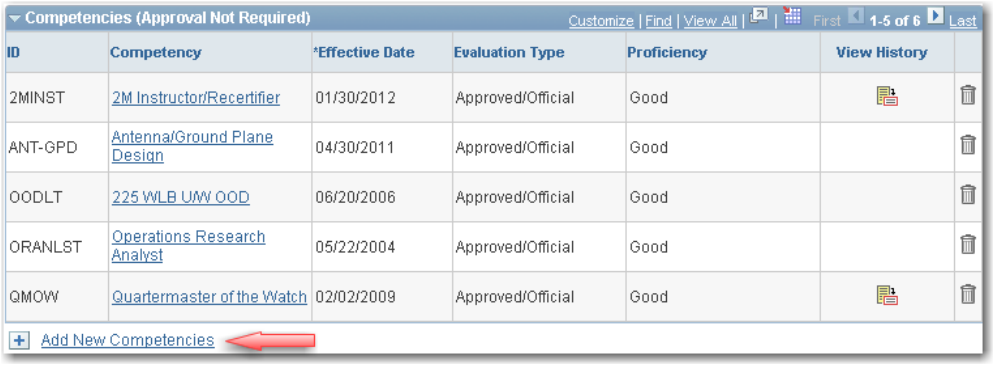
Effective Date	Competency	ID	*Evaluation Type	*Proficiency
01/30/2012	2M Instructor/Recertifier	2MINST	Approved/Official	Good
01/17/2012	2M Instructor/Recertifier	2MINST	Approved/Official	Good

Return to Profile

3.3 Adding a New Competency

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

1. To add a new competency to the member's profile, Click on the click "+ Add New Competencies".



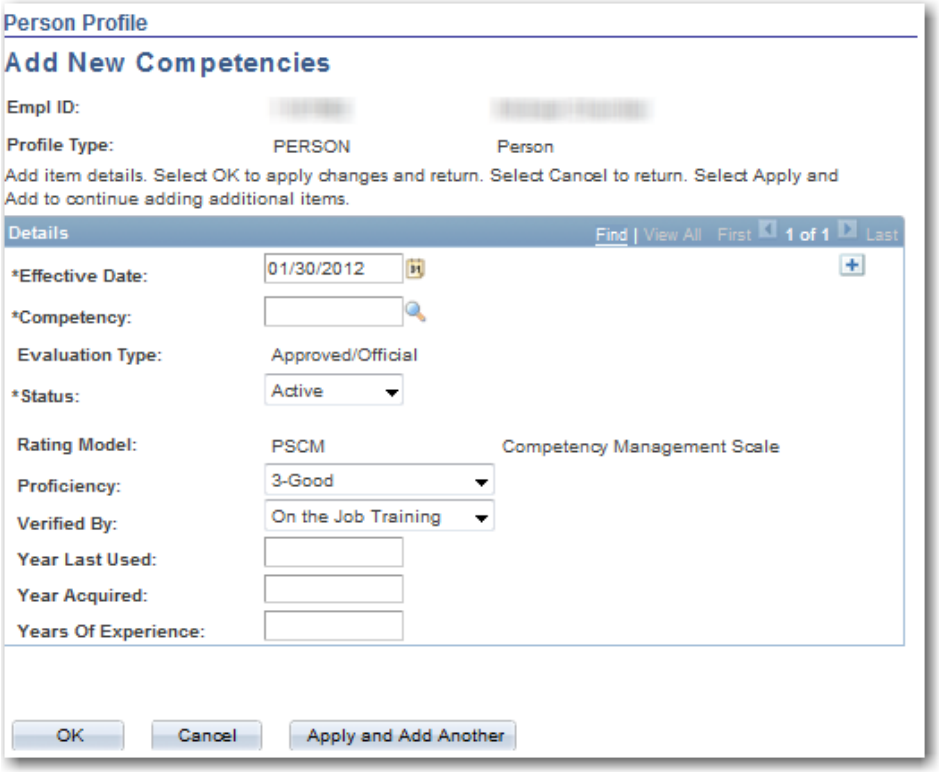
Competencies (Approval Not Required) Customize | Find | View All | First 1-5 of 6 Last

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

2. 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.

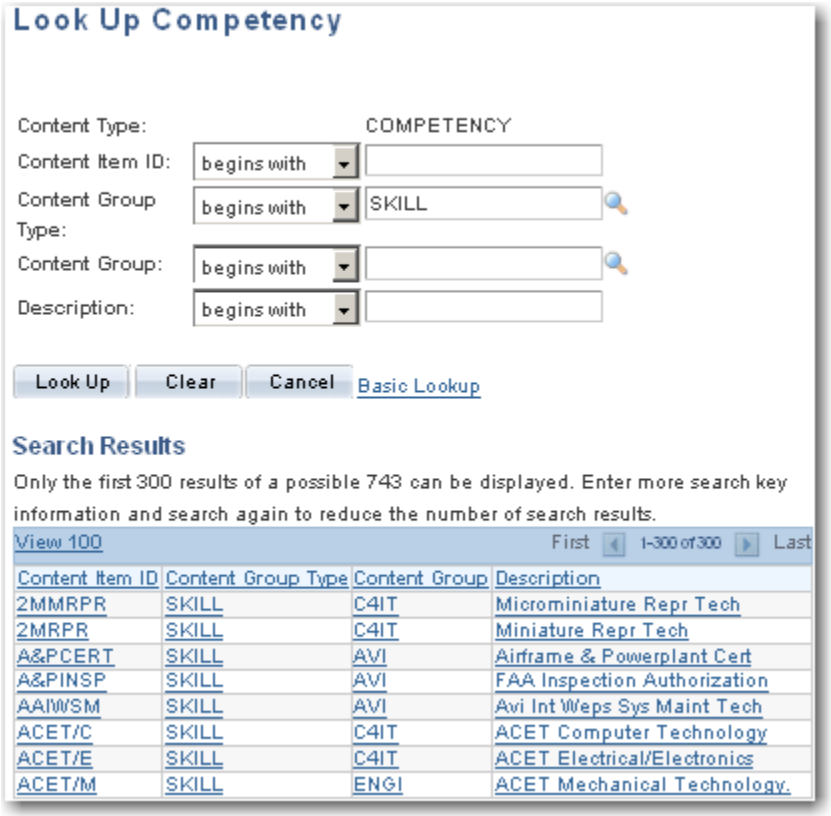


Field	Description/Instructions
* Effective Date **(Required)**	This field defaults to today's date. You can change the date. By clicking on the calendar icon. Effective date should be the date the competency was assigned to the member, i.e. the date the member's CO certified the member as qualified to hold the competency or the date the member graduated/completed the course of instruction. Guidelines for entering Effective Date: • 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)**	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. ***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.* *Reference: Competency Dictionary* https://cgportal.uscg.mil/lotus/mypoc?uri=dm:fdb6a6004098cf7885d3973b01f2374b&verb=view
***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.

*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. *Refer to the Competency Dictionary to select the Verified By field value associated with the competency being selected*
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



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.

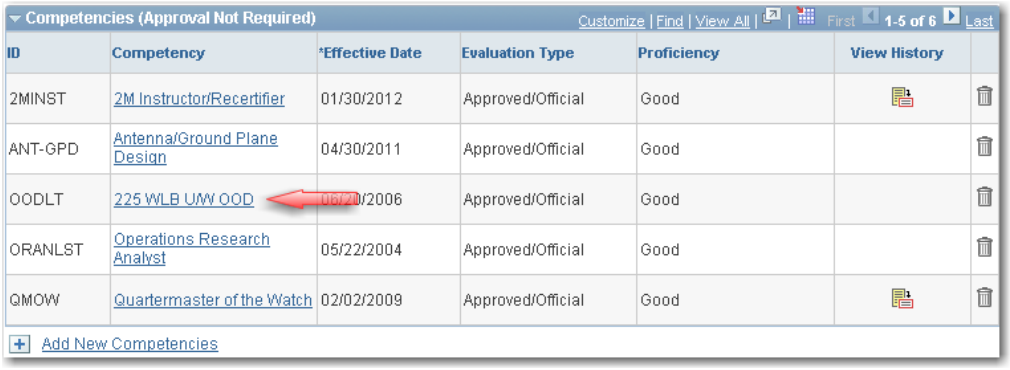
3.4 Adding a Previously Granted Competency

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:

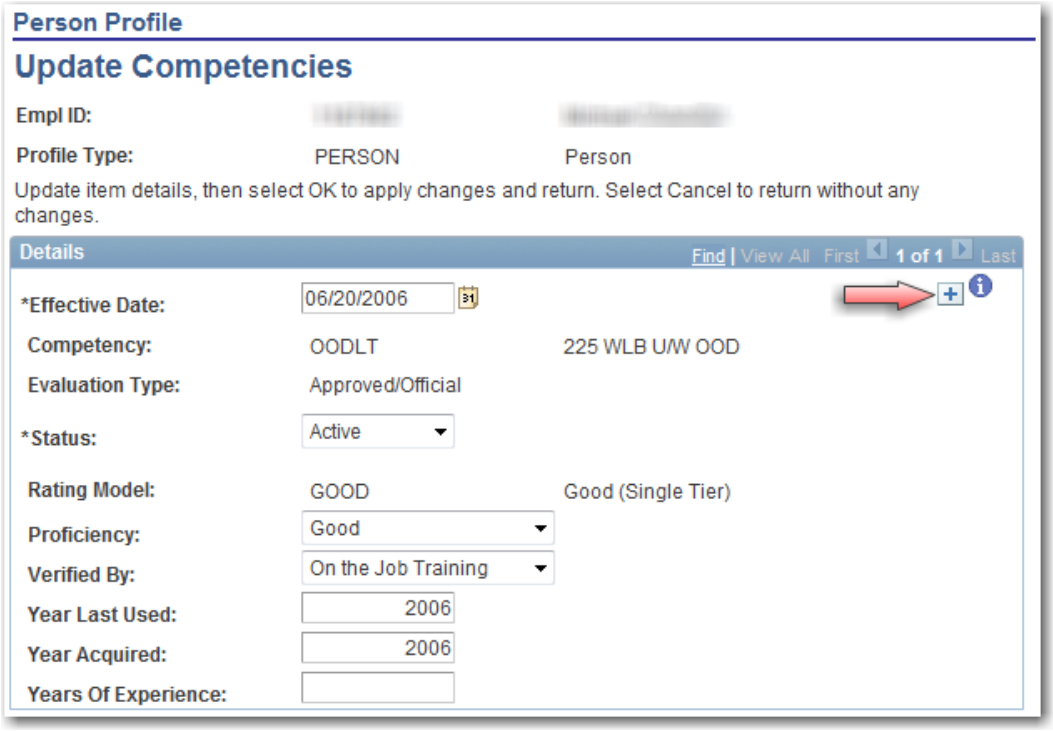
1. Locate the competencies content section on the competencies tab. A list of the member's current competencies will display.
2. In the competency column, click on the existing competency row.

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

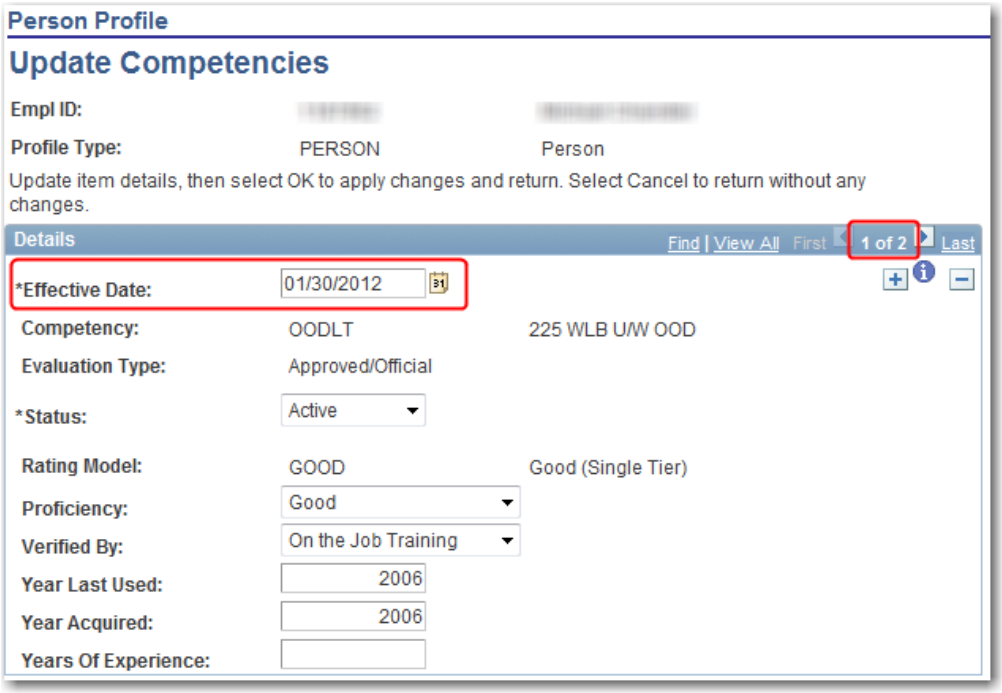


3. The user will be directed to the "Update Competencies" page. Click on the sign in the top right corner of the Detail box to insert a new effective dated row.

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



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.



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.

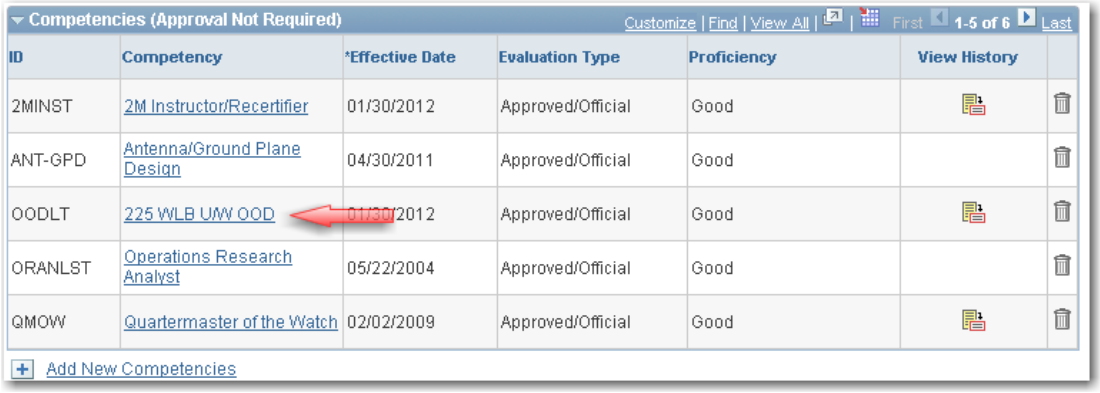
3.5 Adding a Historical Dated Competency for the Same Type

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.

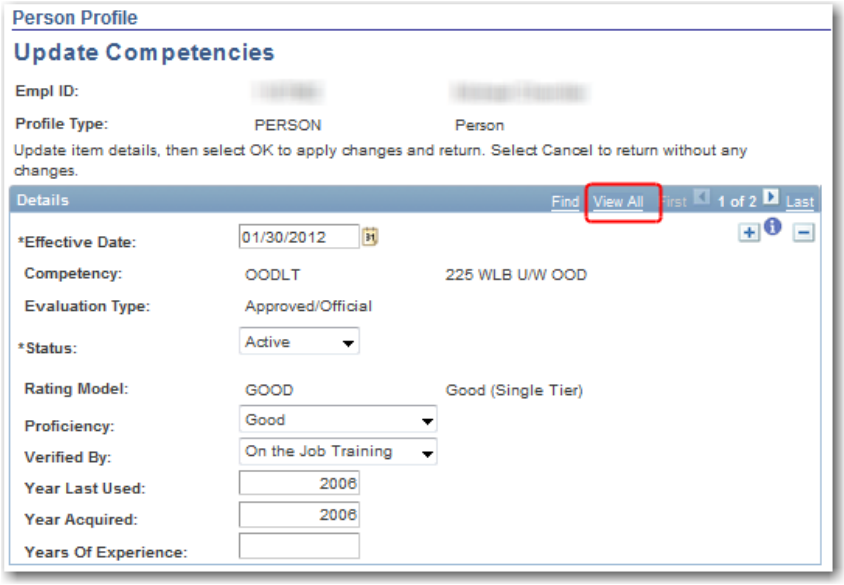
3.5.1 Adding a Historical Dated Row Mid-Stack

1. Follow the instructions in section "4.1. Locating the Member" to search for the member's record.

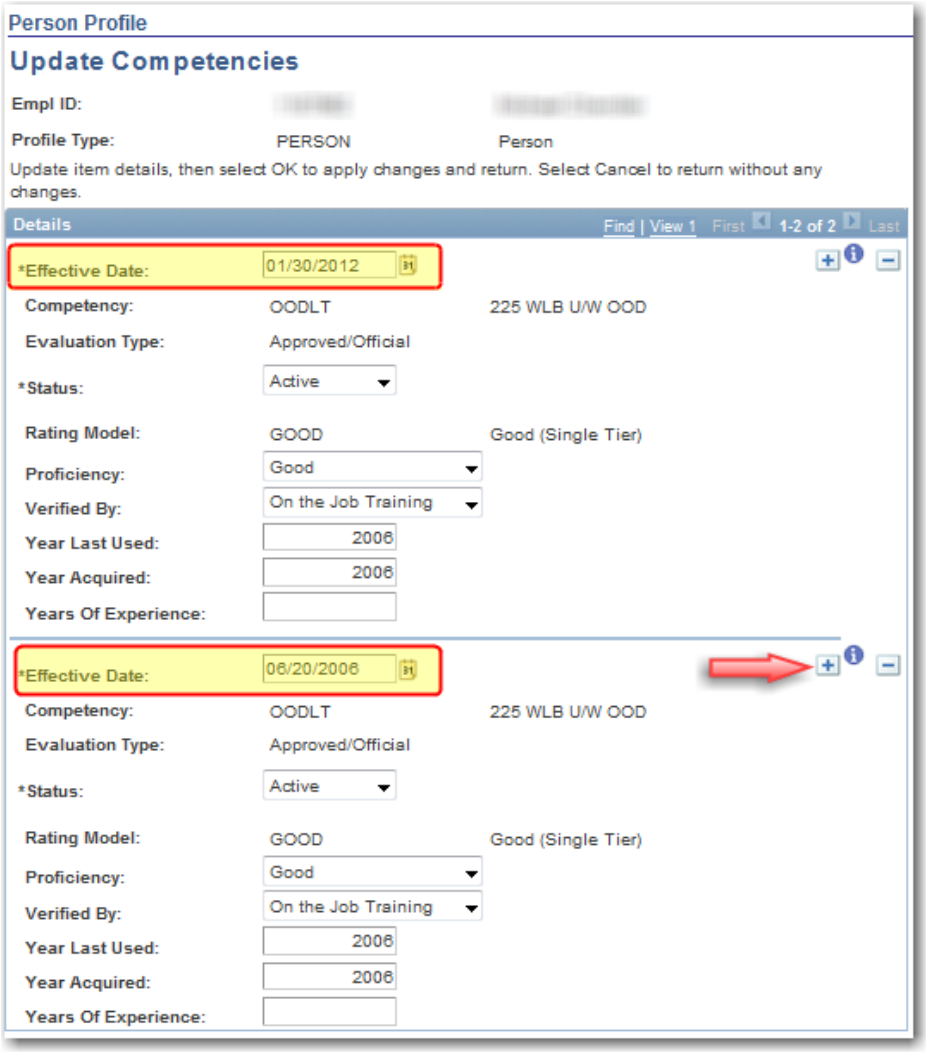
2. From the competency content section, select the competency record in which a historical dated row will be entered.



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

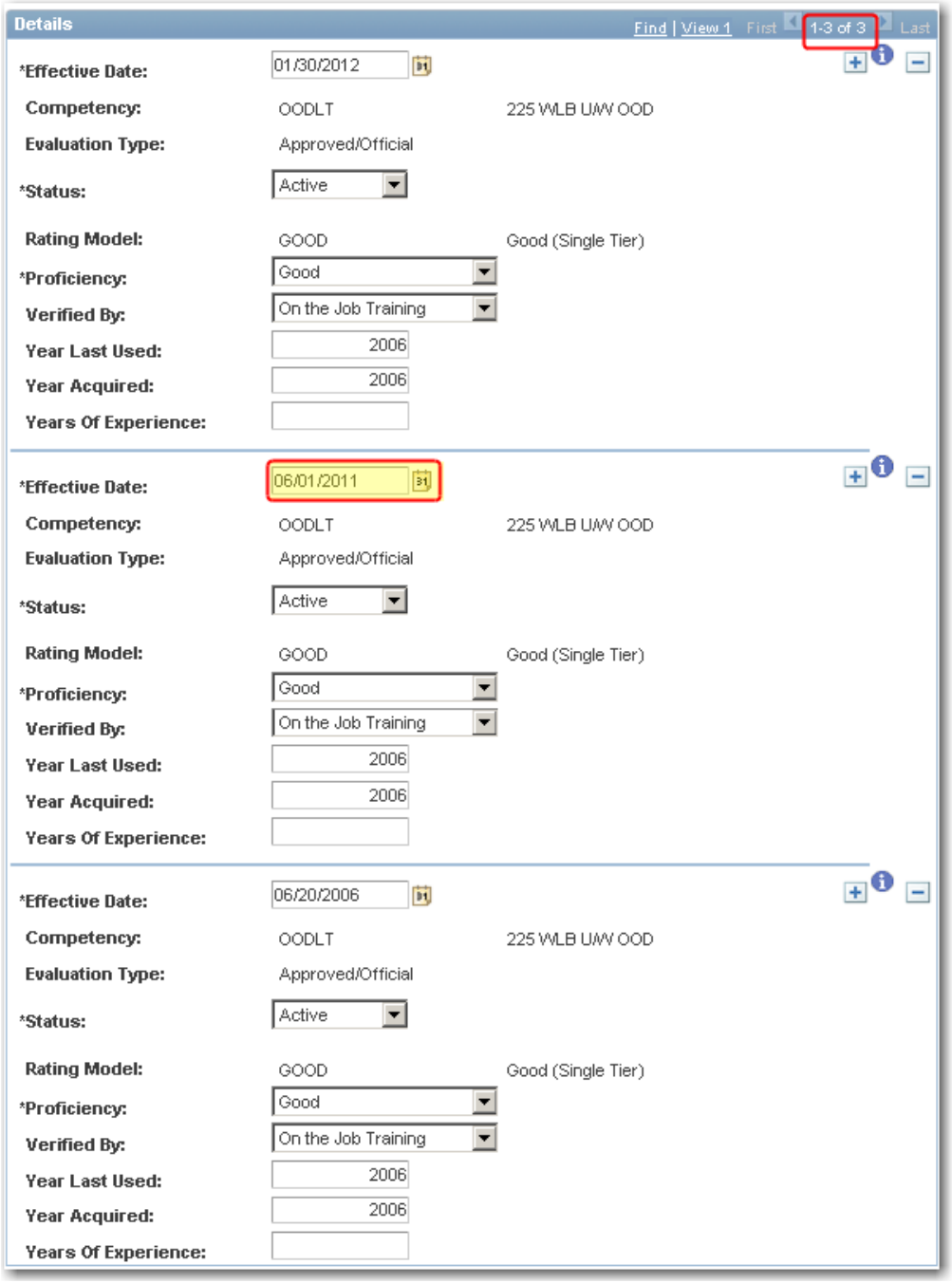


The user will see all the effective dated rows for the competencies.



4. Click the sign located on the most historically dated row. Using the example above the most historically dated row is: **06/20/2006.**

5. 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.


Details
Find | View 1 First 1-3 of 3 Last
*Effective Date: 01/30/2012
Competency: OODLT 225 WLB UW 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 UW 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 UW 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:0**6/01/2011***

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.

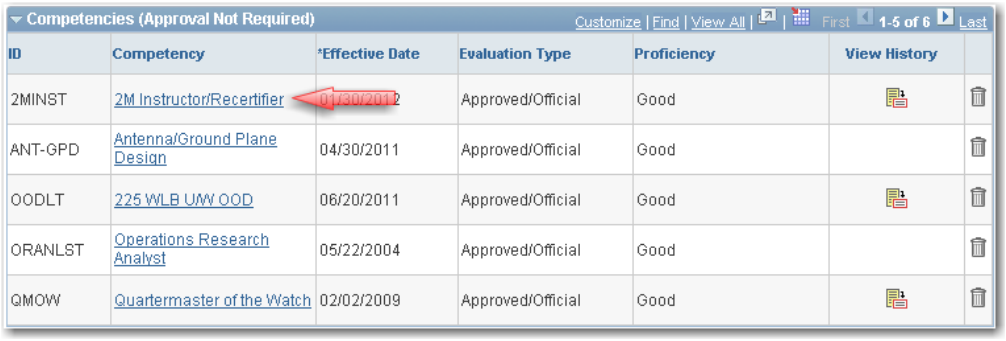
3.5.2 Adding a Historical Dated Row End of Stack

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.

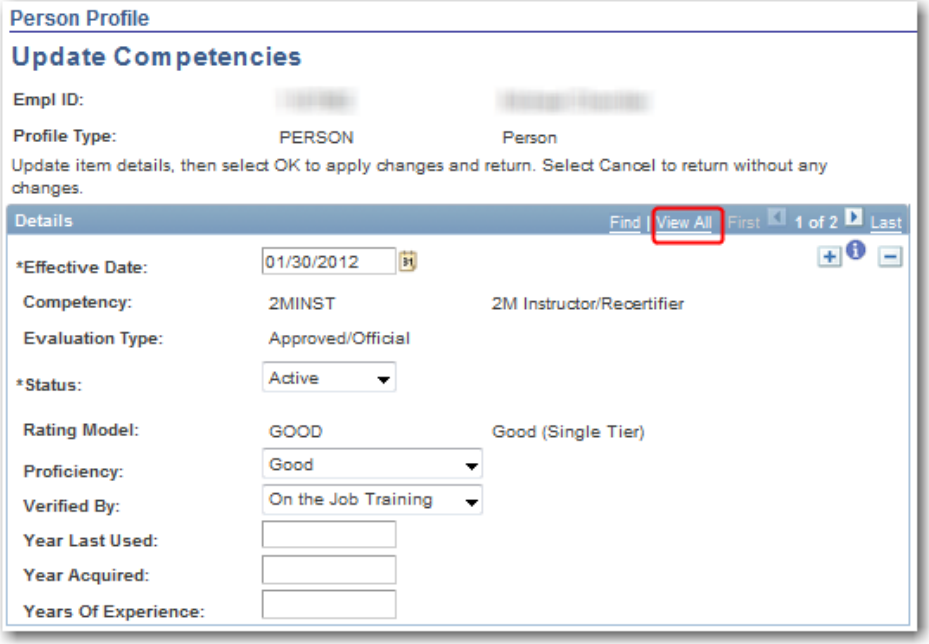


Competencies (Approval Not Required) Customize | Find | View All | First 1-5 of 6 Last

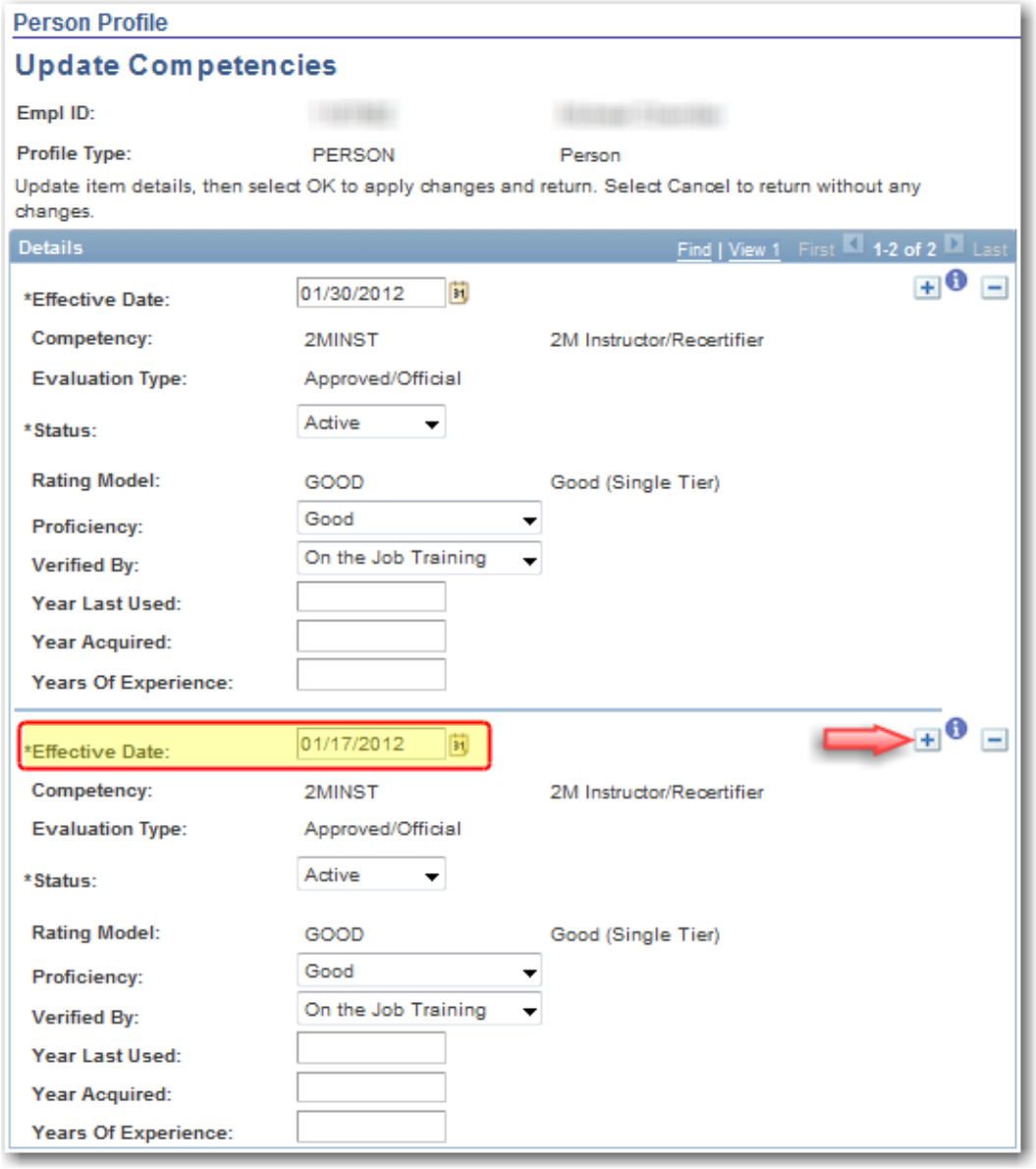
ID	Competency	*Effective Date	Evaluation Type	Proficiency	View History
2MINST	2M Instructor/Recertifier	01/30/2012	Approved/Official	Good	
ANT-GPD	Antenna/Ground Plane Design	04/30/2011	Approved/Official	Good	
OODLT	225 WLB U/W OOD	06/20/2011	Approved/Official	Good	
ORANLST	Operations Research Analyst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

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

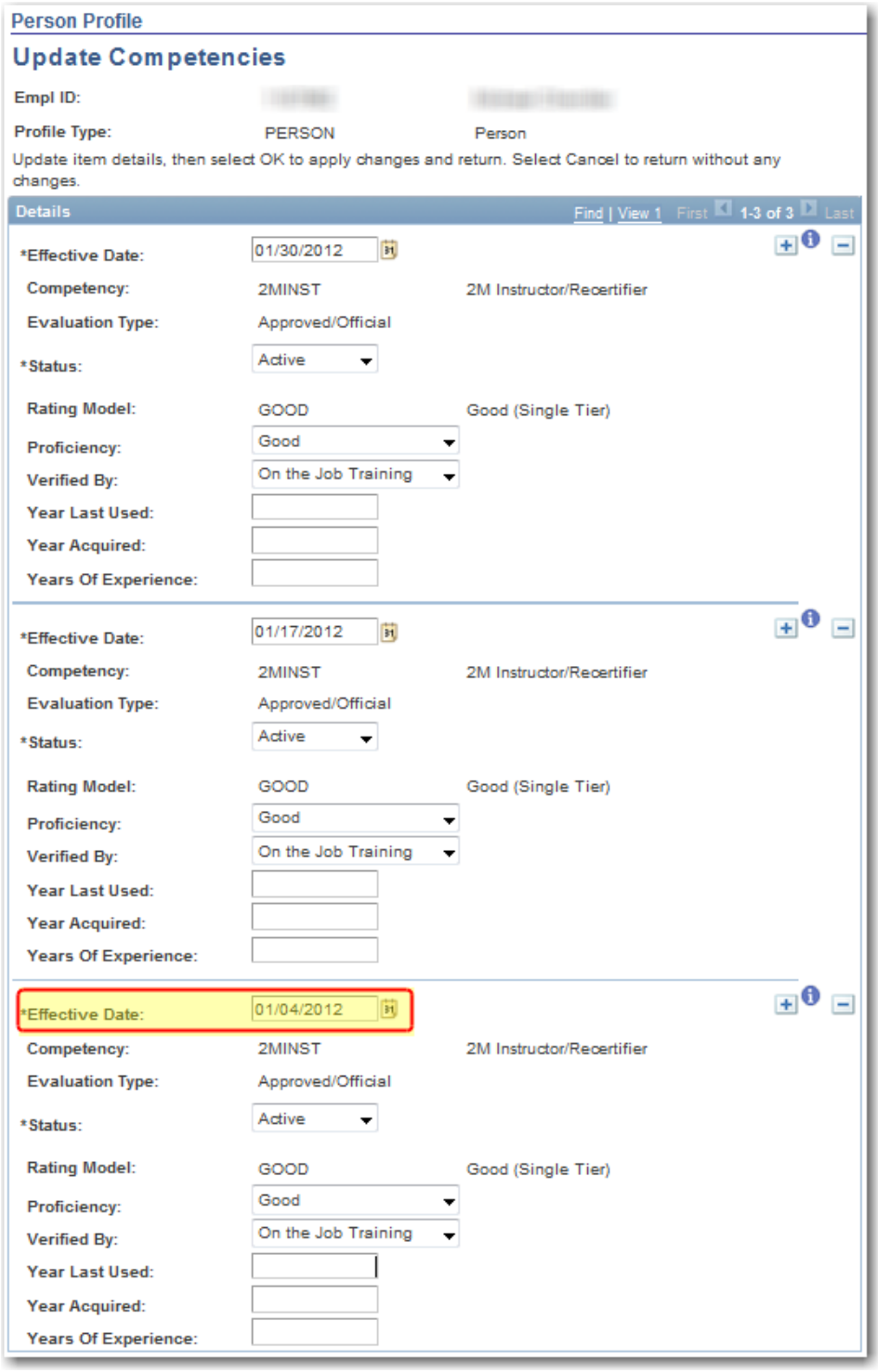
3. Click “View All” in the top right corner of the Details bar to view all current rows on the member’s record.



4. Click the ⊞ sign located on the most historically dated row. *Using the example above the most historically dated row is: 0/17/2011.*



5. 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: 0**1/04/2010***



6. 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.

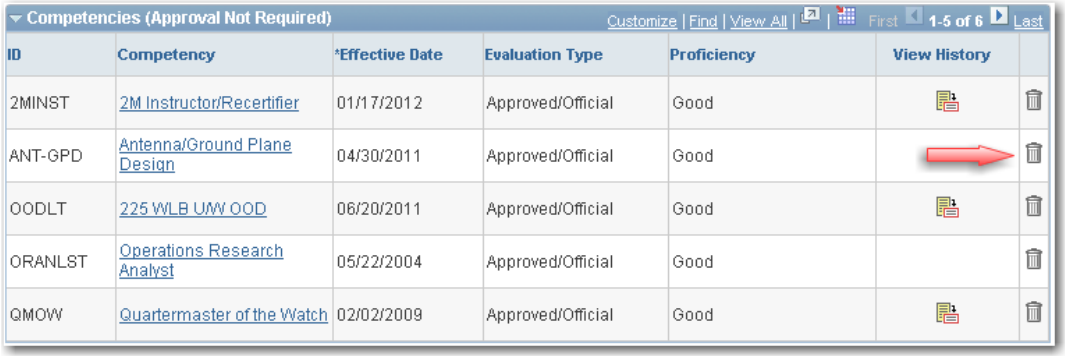
Note: If this is a competency that has just been added, the “-“button used to delete some records will not appear until the user leaves the page and returns. The easiest resolution is to click “Return to Search” and then re-enter the member’s profile.

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.

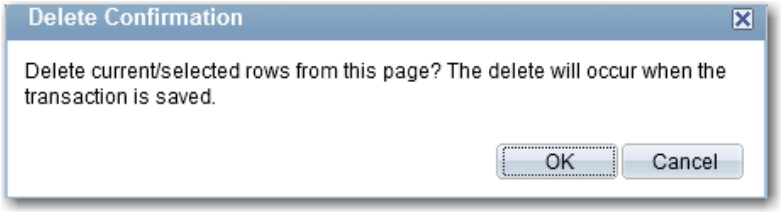
3. To delete a competency that a member has received only once, click the trash can on the competency row



Competencies (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	01/17/2012	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		

4. Click “OK” to confirm the deletion.

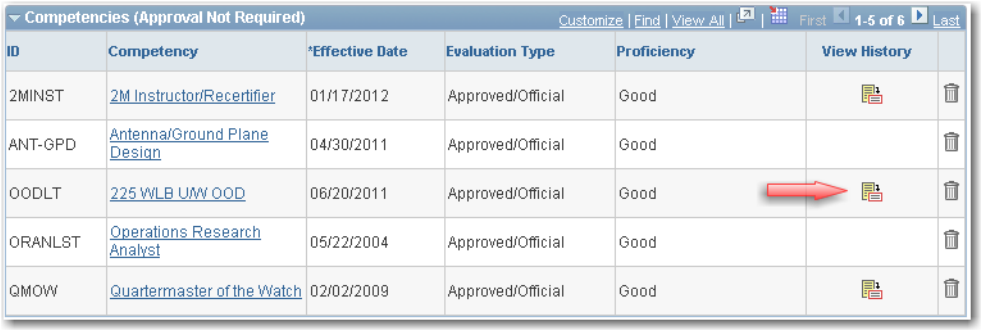


5. Click “OK” to return to the Person Profile page.

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

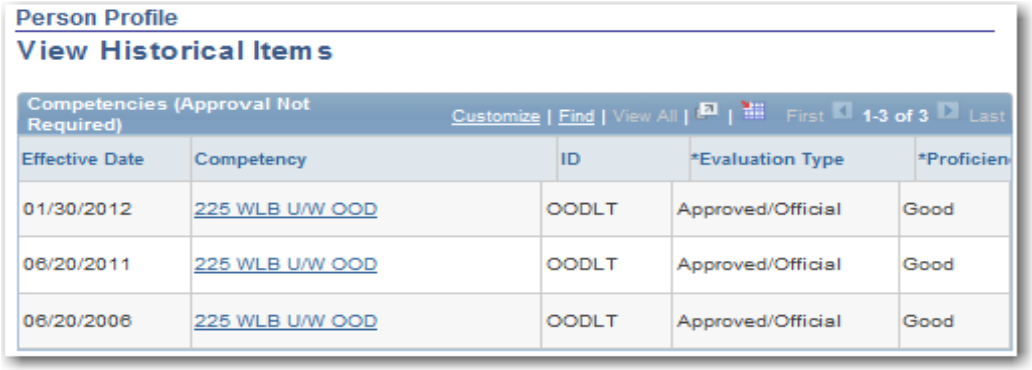
5.2 Deleting One Competency where Multiple Instances Exist

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



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	01/17/2012	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		



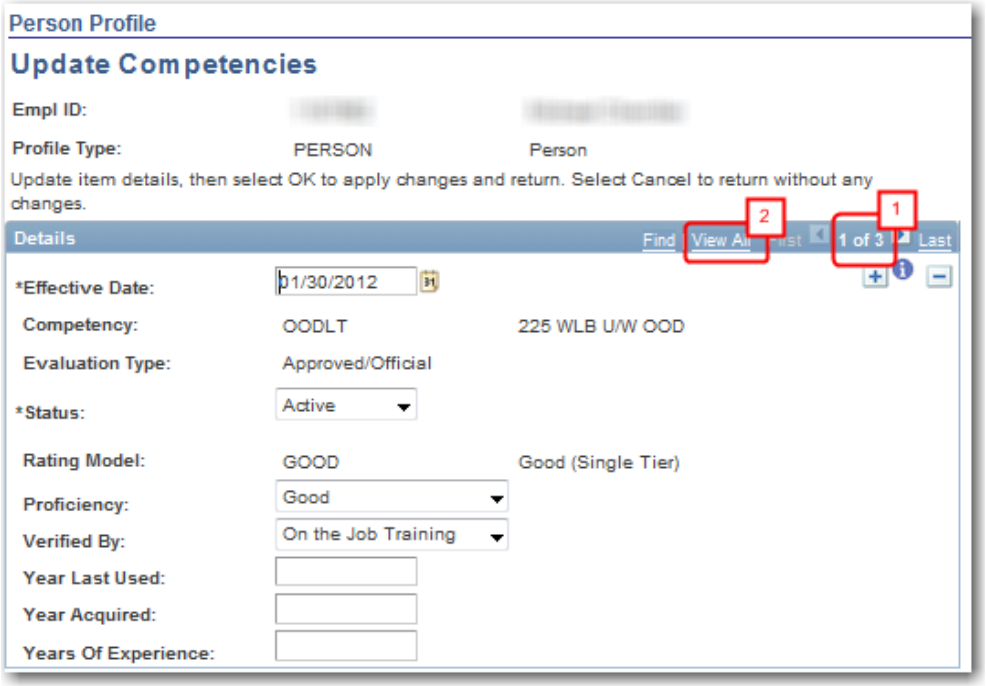
Person Profile

View Historical Items

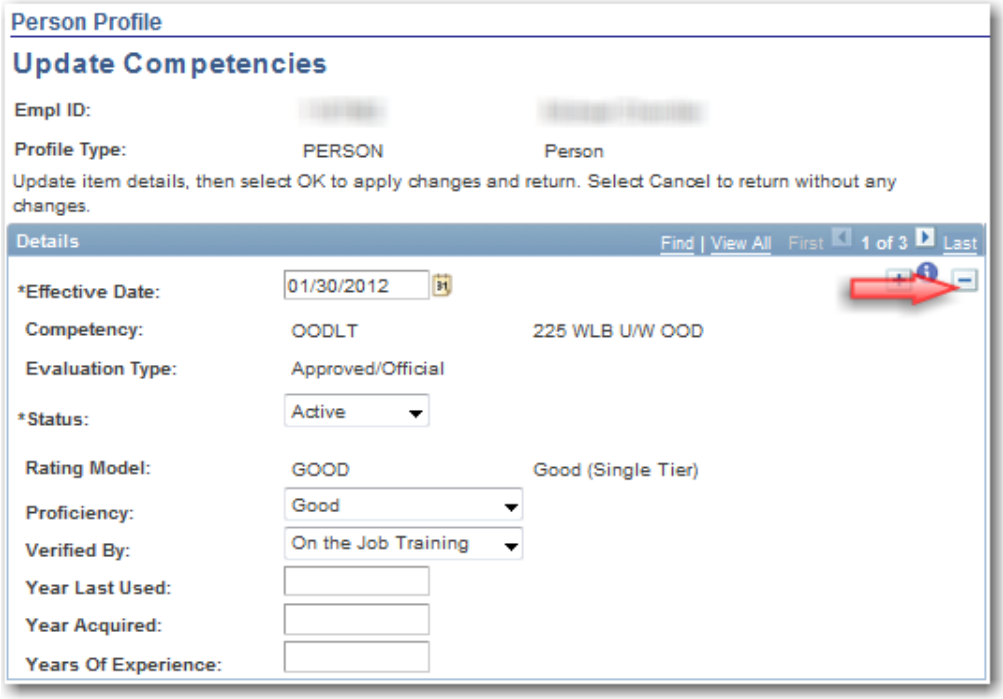
Competencies (Approval Not Required) — Customize | Find | View All | First 1-3 of 3 Last

Effective Date	Competency	ID	*Evaluation Type	*Proficien
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

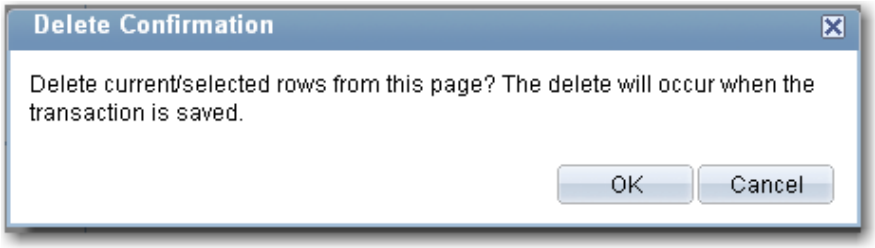
2. Scroll through the records using the 1) Arrows or 2) Click on “View All” to find the correct record to delete.



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



4. Click “OK” to confirm the deletion



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

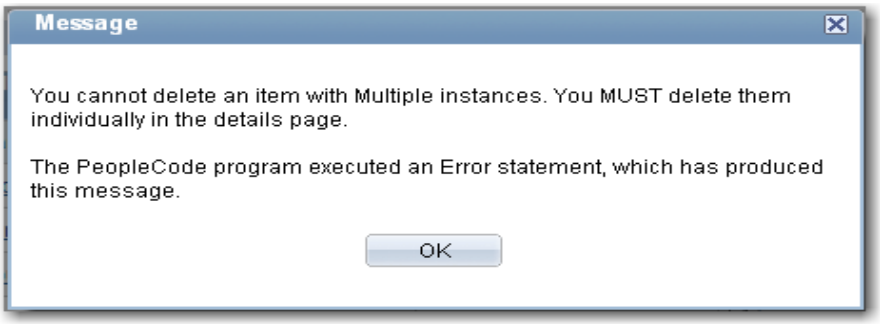
6. Click "Save" at the bottom of the Person Profile page to commit the changes.

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.

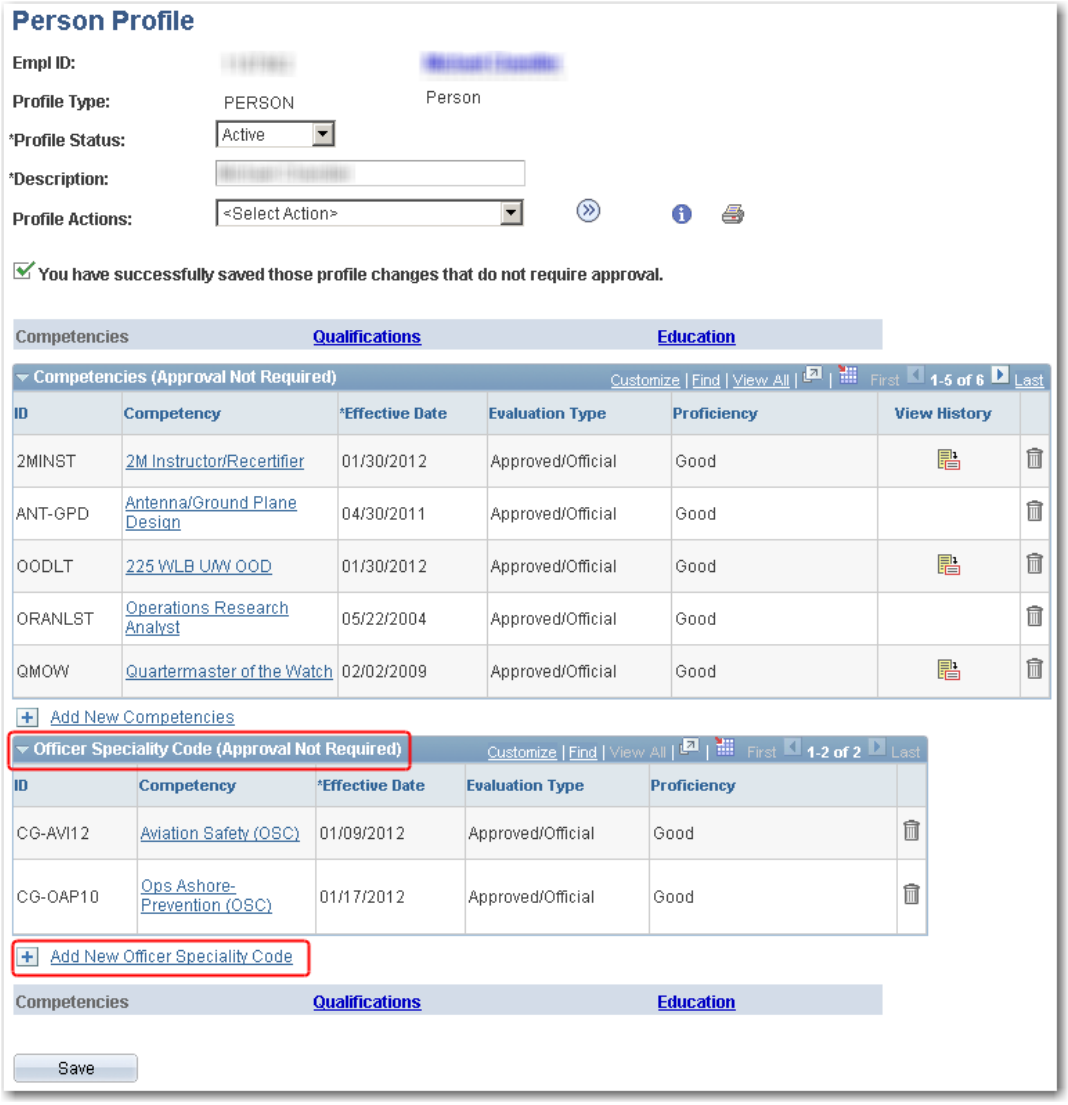
6.1 Entering an Officer Specialty Codes (OSCs)

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



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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