

UNITED STATES COAST GUARD



Person Profiles

Licenses and Certifications

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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)
	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

- 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

- 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

▼ Competencies (Approval Not Required)					Customize	Find	View All	Print	First	1-5 of 13	Last
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 [View History] 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

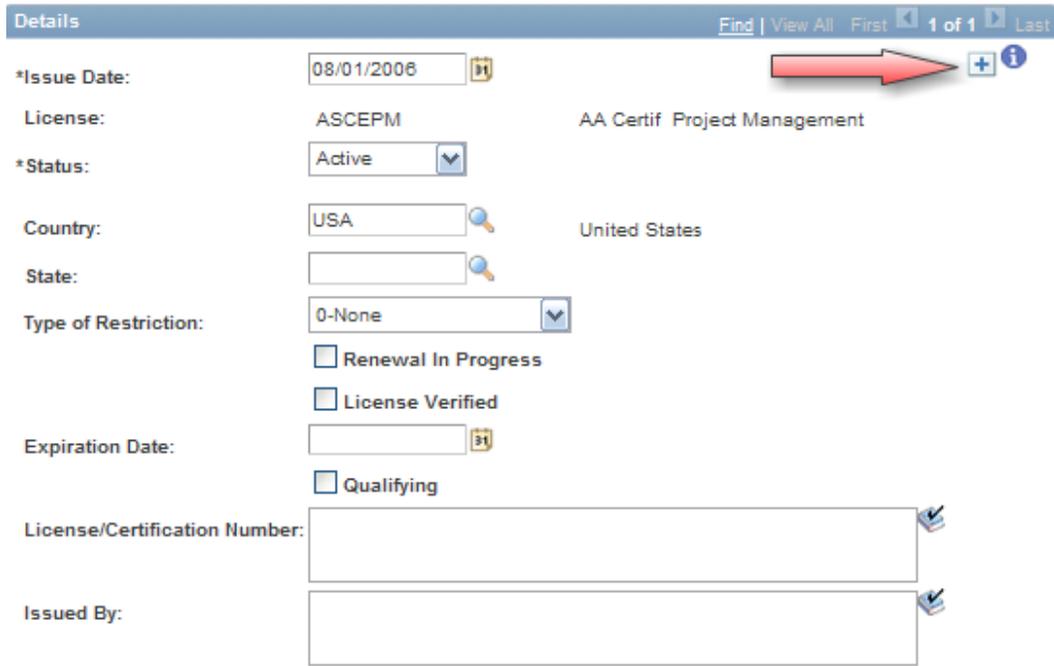
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

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

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



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

*Issue Date: 08/01/2006   

License: ASCEPM AA Certif Project Management

*Status: Active 

Country: USA  United States

State: 

Type of Restriction: 0-None 

Renewal In Progress

License Verified

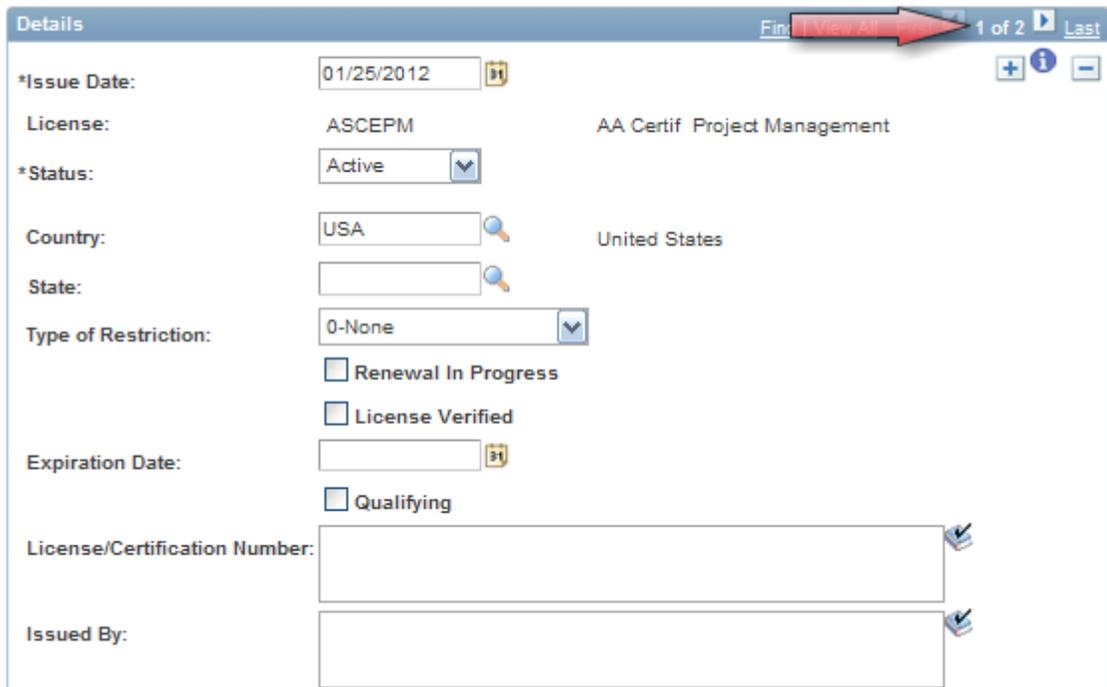
Expiration Date: 

Qualifying

License/Certification Number: 

Issued By: 

- 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.



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

*Issue Date: 01/25/2012    

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

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"/>				

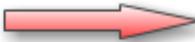
Licenses and Certifications

- 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

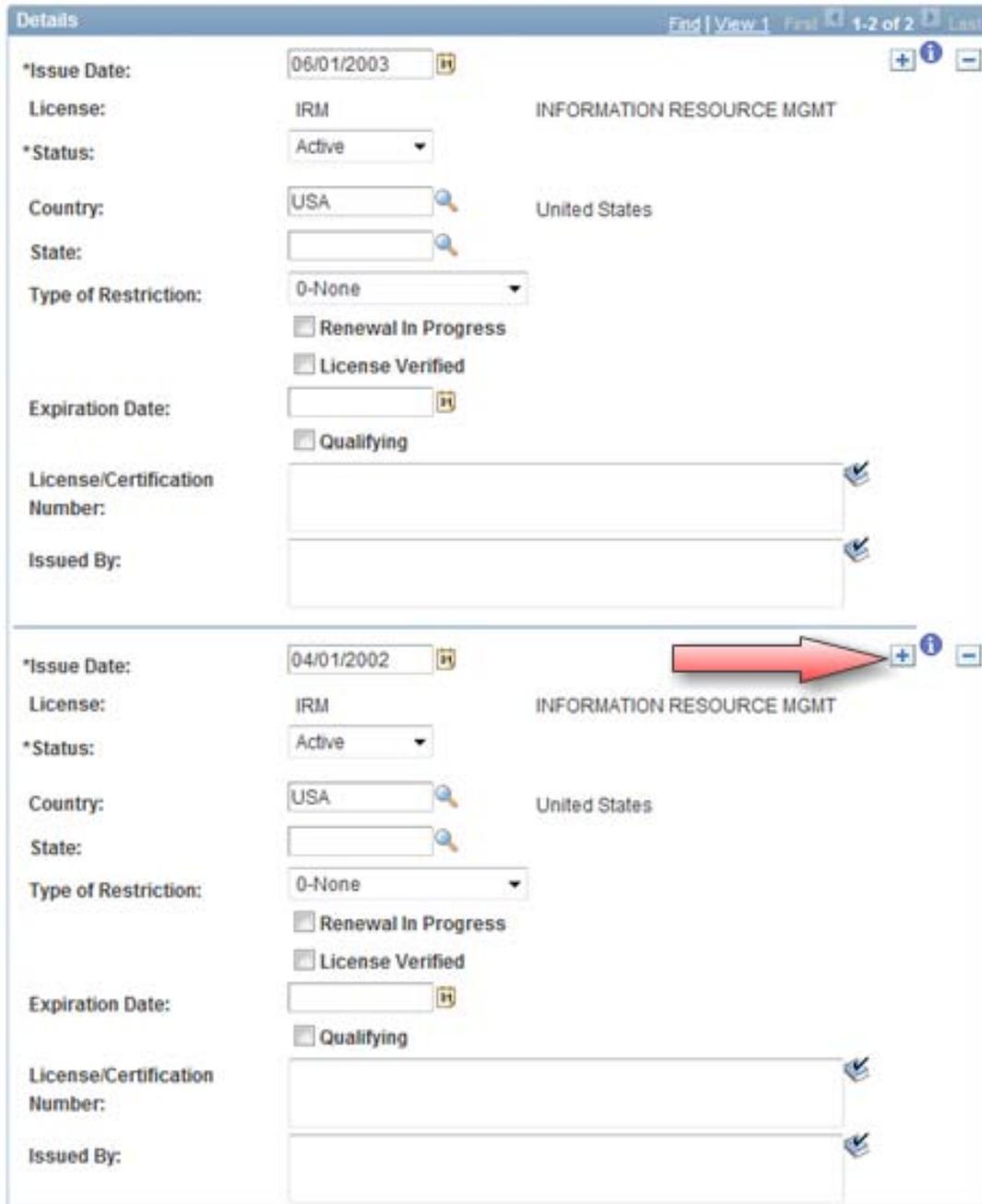
Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

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

- 6. 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.

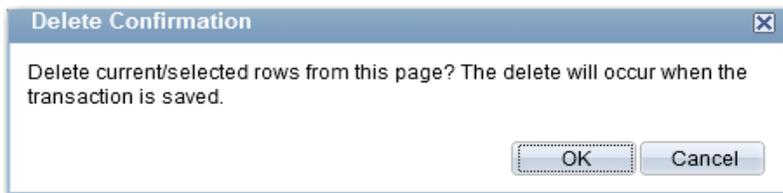
6 Deleting a License or Certification

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:

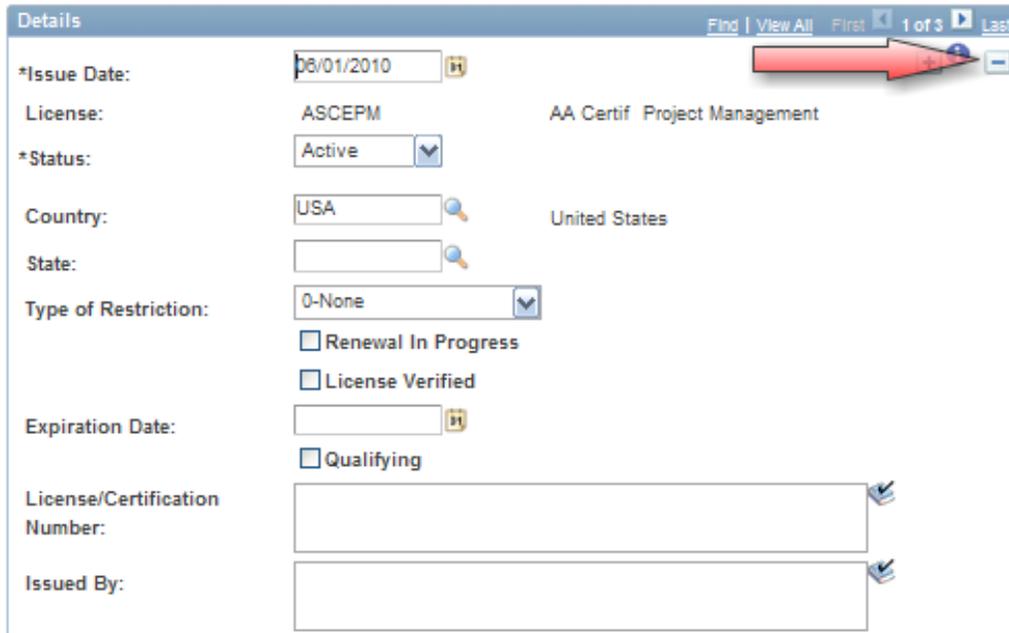
Qualifying

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.

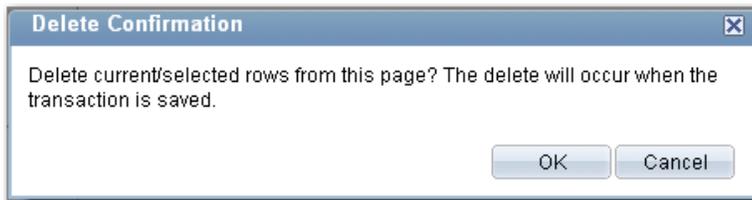


The screenshot shows a 'Details' window for a license record. The fields are as follows:

- *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 includes 'AA Certif Project Management' and '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



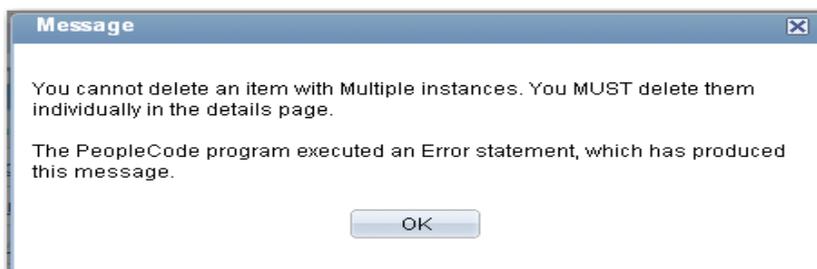
The dialog box is titled 'Delete Confirmation'. It contains the following text: 'Delete current/selected rows from this page? The delete will occur when the transaction is saved.' At the bottom, there are two buttons: 'OK' and 'Cancel'.

- 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.' At the bottom, there is an 'OK' button.