

UNITED STATES PUBLIC HEALTH SERVICE



# Person Profiles

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## 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 PHS officer licenses and certifications are maintained in the Person Profile of Direct Access. Authorized users enter and maintain this information. The information is available to PHS officers 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 an officer, 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 officers 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"
- Input: "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
- Section: Search Results
- Text: Only the first 300 results of a possible 489 can be displayed. Enter more search key information and search again to re
- Table:
 

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 officers 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 the following elements:

- Buttons: Find an Existing Value, 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 1459 can be displayed. Enter more search key information and see View All
  - Navigation: First, 1-100 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
	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 License or Certification

When information about an officer’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 an Officer

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

**HINT:** When attempting to search for an officer, you may use the Direct Access “wildcard” search feature. Refer to section ‘[3. Wildcard Search](#)’ for further instructions.

**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:  

Profile Type:  

Name:

Last Name:

Alternate Character Name:

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 officer's record that has "PERSON" in the Profile Type column.



**Note:** If an officer 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:

Profile Type: PERSON   Person

\*Profile Status:  

\*Description:

Profile Actions:    

Competencies	<b>Qualifications</b>	Education
Competencies	Qualifications	Education

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

## Person Profile

Empl ID:

Profile Type: PERSON Person

\*Profile Status: Active

\*Description:

Profile Actions:

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

▶ Honors and Awards (Approval Not Required)

[Add New Honors and Awards](#)

▼ Licenses & Certifications (Approval Not Required) [Customize](#) | [Find](#) | [View All](#) |  |  First  1-2 of 2  Last

ID	License	Qualifying	Expiration Date	View History	
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>			
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012		

[Add New Licenses & Certifications](#)

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

Below is an example of all the licenses/certifications the officer has under the ASCEPM License/Certification Code:

Licenses & Certifications (Approval Not Required)				
Effective Date	License	ID	Qualifying	Expiration Date
02/01/2008	<a href="#">AA Certif Project Management</a>	ASCEPM	<input type="checkbox"/>	
02/01/2005	<a href="#">AA Certif Project Management</a>	ASCEPM	<input type="checkbox"/>	

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

Licenses & Certifications (Approval Not Required)					
ID	License	Qualifying	Expiration Date	View History	
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>			
BCBIOLA1	<a href="#">Biology</a>	<input type="checkbox"/>			
CGAHACER	<a href="#">CPR - Heartsaver Adult/Pediatr</a>	<input type="checkbox"/>	02/02/2013		
CTAPRNA5	<a href="#">APRN-BC(CNS) Public/Com Health</a>	<input type="checkbox"/>			
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012		

3. 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 an officer’s profile.

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

#### Person Profile

Empl ID:

Profile Type: PERSON Person

\*Profile Status: Active

\*Description:

Profile Actions:

#### Competencies Qualifications Education

##### Honors and Awards (Approval Not Required)

[Add New Honors and Awards](#)

Licenses & Certifications (Approval Not Required)					
ID	License	Qualifying	Expiration Date	View History	
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>			
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012		

[Add New Licenses & Certifications](#)

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 <b>Effective Date</b> . 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	Enter the type of restriction for the license, if any. The default value is N-None
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	Check the Qualifying checkbox if this is the type of license that the officer used to qualify for his or her commission
License/Certification Number	Enter the License or Certification number given by the issuing authority
Issued By	Enter the 4-digit organization code and name of the organization that issued the License or Certification, i.e., 0521 NY BOARD OF PHARMACY
OK	Click OK to Save the page. <b>NOTE:</b> 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 license/certification code
- b. **Content Group Type:** N/A
- c. **Content Group:** N/A
- d. **Description:** Enter all or part of the title of the license/certification

## 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:	11/30/1959				
License:	PHARM				Pharmacist
*Status:	Active				
Country:	USA				United States
State:	NY				New York
Type of Restriction:	0-None				
	<input type="checkbox"/> Renewal In Progress				
	<input type="checkbox"/> License Verified				
Expiration Date:	11/30/2012				
	<input checked="" type="checkbox"/> Qualifying				
License/Certification Number:	043699-1				
Issued By:	0521 NY BOARD OF PHARMACY				

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 Officer 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 officer's profile.

**NOTE:** The system allows a license/certification with different effective dates to be entered on an officer'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 officer's current licenses/certifications will display under the Licenses & Certifications content section

### Person Profile

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

\*Profile Status: Active

\*Description: [REDACTED]

Profile Actions: <Select Action>

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

▶ Honors and Awards (Approval Not Required)

+ Add New Honors and Awards

▼ Licenses & Certifications (Approval Not Required) [Customize](#) | [Find](#) | [View All](#) | | | First 1-3 of 3 Last

ID	License	Qualifying	Expiration Date	View History	
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>			
CGAHACER	<a href="#">CPR - Heartsaver Adult/Pediatr</a>	<input type="checkbox"/>	08/01/2008		
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012		

+ Add New Licenses & Certifications

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

▼ Licenses & Certifications (Approval Not Required) [Customize](#) | [Find](#) | [View All](#) | | | First 1-3 of 3 Last

ID	License	Qualifying	Expiration Date	View History	
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>			
CGAHACER	<a href="#">CPR - Heartsaver Adult/Pediatr</a>	<input type="checkbox"/>	08/01/2008		
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012		

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

## 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 Find | View All First 1 of 1 Last

\*Issue Date: 08/01/2007 [BT] + i

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active

Country: USA United States

State:

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date: 08/01/2008 [BT]

Qualifying

License/Certification Number:

Issued By:

**IMPORTANT:** The system does not allow the entry of duplicate entries in an officer's profile. If you enter a license or certification with an Issue Date that already exists in the officer'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.

Details Find | View All First 1 of 1 Last

\*Issue Date: 08/01/2007 [BT] + i

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active

Country: USA United States

State:

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date: 08/01/2008 [BT]

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.

The screenshot shows a 'Details' form for a license record. The form includes the following fields and values:

- \*Issue Date:** 01/25/2012
- License:** CGAHACER (CPR - Heartsaver Adult/Pediatr)
- \*Status:** Active
- Country:** USA (United States)
- State:** (empty)
- Type of Restriction:** 0-None
- Expiration Date:** 01/25/2013
- License/Certification Number:** (empty)
- Issued By:** (empty)

Additional options include checkboxes for 'Renewal In Progress', 'License Verified', and 'Qualifying'. A red arrow points to the '1 of 2' indicator in the top right corner of the form.

- Complete the additional fields as indicated in section ‘[4.3. Adding a New License or Certification](#)’.
- 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	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>		
CGAHACER	<a href="#">CPR - Heartsaver Adult/Pediatr</a>	<input type="checkbox"/>	06/01/2010	
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012	

- 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 Officer 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, 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 license/certification mid-stack:

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

Licenses & Certifications (Approval Not Required)				
Customize   Find   View All   First 1-3 of 3 Last				
ID	License	Qualifying	Expiration Date	View History
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>		 
CGAHACER	<a href="#">CPR - Heartsaver Adult/Pediatr</a>	<input type="checkbox"/>	06/01/2010	 
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012	

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 officer'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:	<input type="text" value="06/01/2009"/>				
License:	CGAHACER	CPR - Heartsaver Adult/Pediatr			
*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" value="06/01/2010"/>				
	<input type="checkbox"/> Qualifying				
License/Certification Number:	<input type="text"/>				
Issued By:	<input type="text"/>				

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

*Issue Date:	06/01/2009			
License:	CGAHACER		CPR - Heartsaver Adult/Pediatr	
*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:	06/01/2010			
	<input type="checkbox"/> Qualifying			
License/Certification Number:				
Issued By:				

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*Issue Date:	08/01/2007			
License:	CGAHACER		CPR - Heartsaver Adult/Pediatr	
*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:	08/01/2008			
	<input type="checkbox"/> Qualifying			
License/Certification Number:				
Issued By:				



6. 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: 06/01/2009 

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active 

Country: USA  United States

State: 

Type of Restriction: 0-None 

Renewal In Progress

License Verified

Expiration Date: 06/01/2010 

Qualifying

License/Certification Number:

Issued By:

Details Find | View All First 2 of 3 Last

\*Issue Date: 08/01/2007 

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active 

Country: USA  United States

State: 

Type of Restriction: 0-None 

Renewal In Progress

License Verified

Expiration Date: 08/01/2008 

Qualifying

License/Certification Number:

Issued By:

Details Find | View All | First 3 of 3 Last

\*Issue Date: 08/01/2007 

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active 

Country: USA  United States

State: 

Type of Restriction: 0-None 

Renewal In Progress

License Verified

Expiration Date: 08/01/2008 

Qualifying

License/Certification Number:

Issued By:

- 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: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active 

Country: USA  United States

State: 

Type of Restriction: 0-None 

Renewal In Progress

License Verified

Expiration Date: 07/01/2009 

Qualifying

License/Certification Number:

Issued By:

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

#### 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 an Officer](#)’ to search for the officer’s record.
2. Click the Qualifications tab and search for the Licenses & Certifications content section. A list of the officer’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 & Certifications (Approval Not Required)					
Customize   Find   View All   First 1-3 of 3 Last					
ID	License	Qualifying	Expiration Date	View History	
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>			
CGAHACER	<a href="#">CPR - Heartsaver Adult/Pediatr</a>	<input type="checkbox"/>	06/01/2010		
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012		

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 officer'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: ASCEPM AA Certif Project Management

\*Status: Active v

Country: USA  United States

State: 

Type of Restriction: 0-None v

Renewal In Progress

License Verified

Expiration Date:   Qualifying

License/Certification Number: 

Issued By: 

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

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

*Issue Date:	06/01/2003 	  
License:	ASCEPM	AA Certif Project Management
*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:		
Issued By:		

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*Issue Date:	04/01/2002 	  
License:	ASCEPM	AA Certif Project Management
*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:		
Issued By:		



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.

The image displays two screenshots of a 'Details' form for license records. The top screenshot shows a record with the following fields: \*Issue Date: 06/01/2003; License: ASCEPM (AA Certif Project Management); \*Status: Active; Country: USA (United States); State: (empty); Type of Restriction: 0-None; Expiration Date: (empty); License/Certification Number: (empty); Issued By: (empty). A red arrow points to the '1 of 3' indicator in the top right corner. The bottom screenshot shows a record with the following fields: \*Issue Date: 04/01/2002; License: CGAHACER (CPR - Heartsaver Adult/Pediatr); \*Status: Active; Country: USA (United States); State: (empty); Type of Restriction: 0-None; Expiration Date: 04/01/2003; License/Certification Number: (empty); Issued By: (empty). The 'Expiration Date' field is populated with 04/01/2003, which is the historical date from the previous record.

Details Find | View All | First 3 of 3 Last

\*Issue Date: 04/01/2002 + i -

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active v

Country: USA United States

State: v

Type of Restriction: 0-None v

Renewal In Progress

License Verified

Expiration Date: 04/01/2003 + i -

Qualifying

License/Certification Number: v

Issued By: v

7. Adjust the Issue Date of the **LAST** row 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 + i -

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active v

Country: USA United States

State: v

Type of Restriction: 0-None v

Renewal In Progress

License Verified

Expiration Date: 01/01/2002 + i -

Qualifying

License/Certification Number: v

Issued By: v

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 an Officer](#)' to search for the officer'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

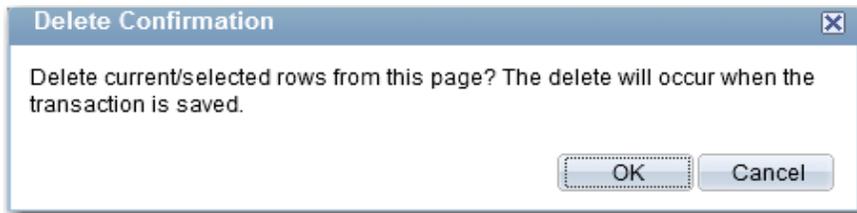
## 6 Deleting a License or Certification

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 officer 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 officer's profile. This is a nuance of the application.

### 6.1 Deleting a Single License or Certification

1. Follow the instructions from section '[4.1 Locating an Officer](#)' to search for the officer'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.
6. Click Save at the bottom of the Person Profile page to commit the changes.

## 6.2 Deleting One License and Certification of Multiple Instances

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

ID	License	Qualifying	Expiration Date	View History	
ASCEPM	<a href="#">AA Certif Project Management</a>	<input type="checkbox"/>			
CGAHACER	<a href="#">CPR - Heartsaver Adult/Pediatr</a>	<input type="checkbox"/>	06/01/2010		
NRSRN	<a href="#">Nursing</a>	<input checked="" type="checkbox"/>	08/31/2012		

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

### 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 Find | View All | [REDACTED] | [REDACTED] | Last

\*Issue Date: 06/01/2009 [calendar icon]

License: CGAHACER CPR - Heartsaver Adult/Pediatr

\*Status: Active [dropdown arrow]

Country: USA [magnifying glass icon] United States

State: [magnifying glass icon]

Type of Restriction: 0-None [dropdown arrow]

Renewal In Progress

License Verified

Expiration Date: 06/01/2010 [calendar icon]

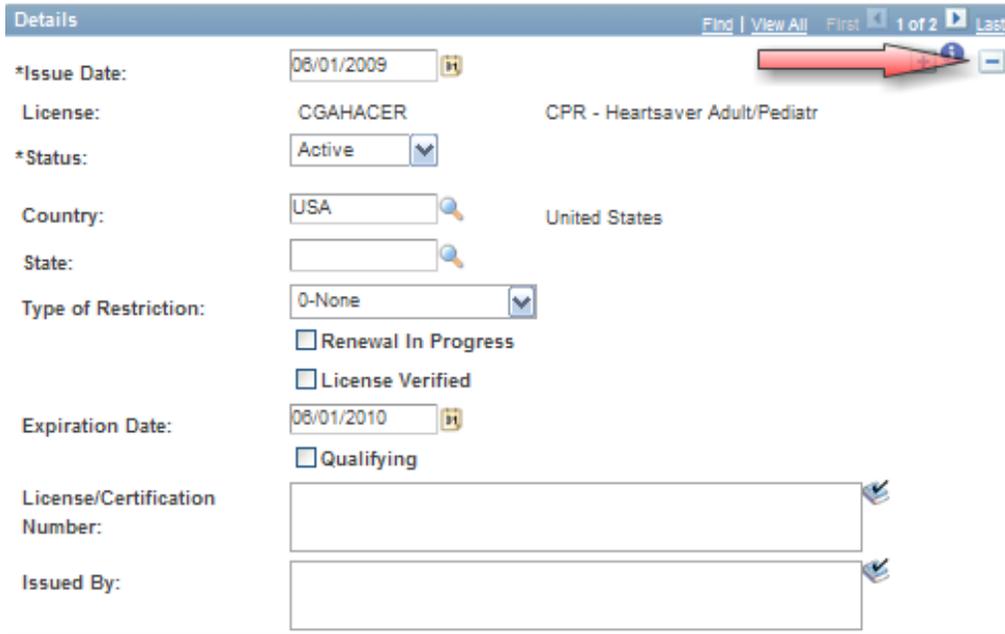
Qualifying

License/Certification Number: [text input] [lock icon]

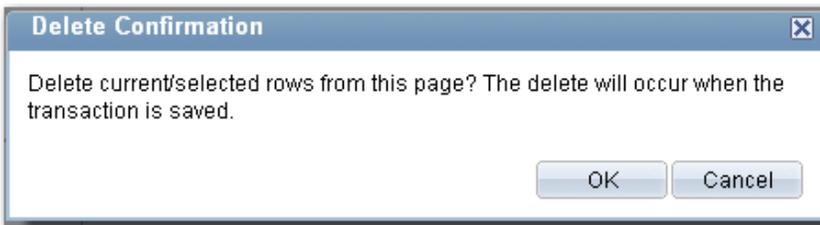
Issued By: [text input] [lock icon]

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.



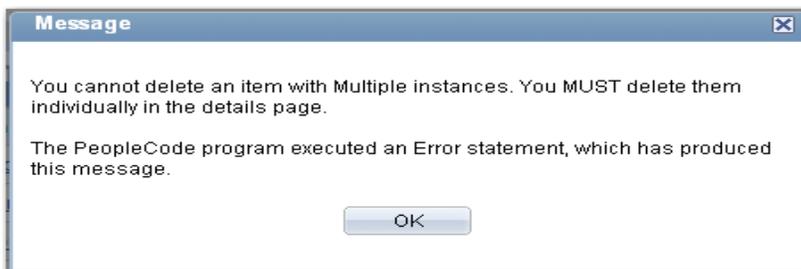
- Click OK to confirm the deletion



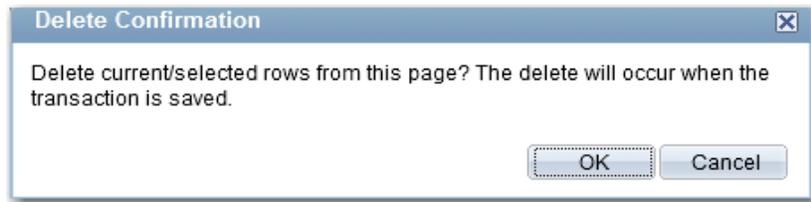
- Click OK to return to the Person Profile page.
- Click Save at the bottom of the Page Profile to commit the changes.

### 6.3 Deleting All Records for a License or Certification Type

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:



1. To delete the record each license/certification must be deleted individually using the steps outlined in section [‘6.2 Deleting One License or Certification of Multiple Instances’](#)
2. Once there is a single license/certification left in the record Click OK to return to the Person Profile page.
3. Click the trashcan on the license or certification row to be deleted.
4. Click OK to confirm the deletion



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