Licenses and Certificates

Overview

Introduction   This guide provides the procedures for viewing, adding, correcting, and deleting Licenses and Certifications in Direct Access (DA).
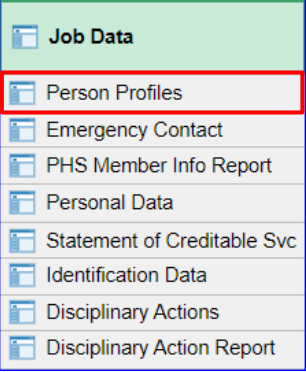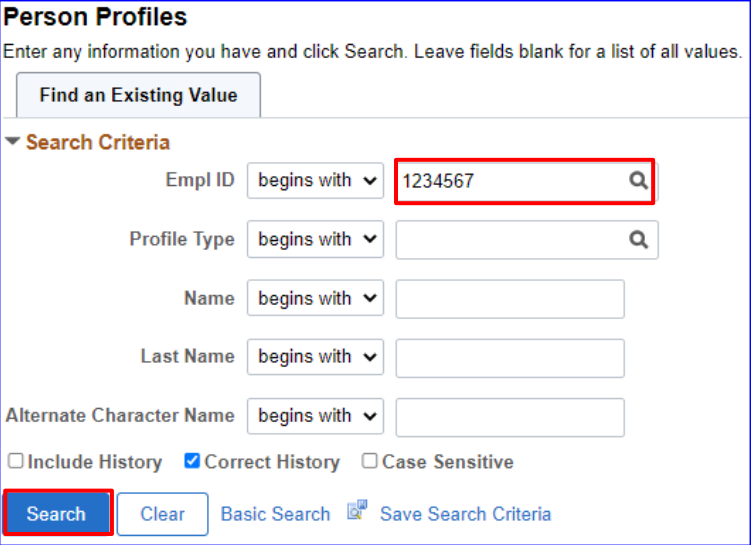
Contents

Viewing a License/Certification

Introduction   This section provides the procedures for viewing a member's License/Certification in DA.

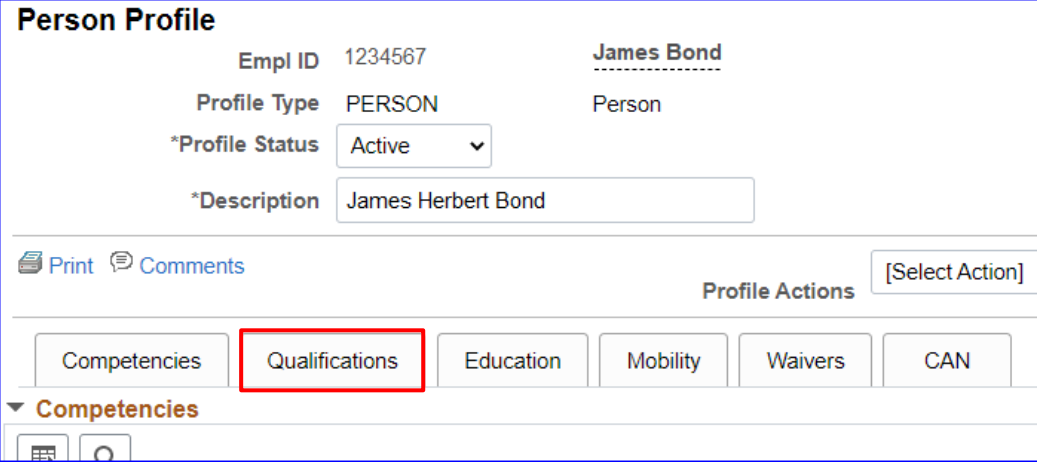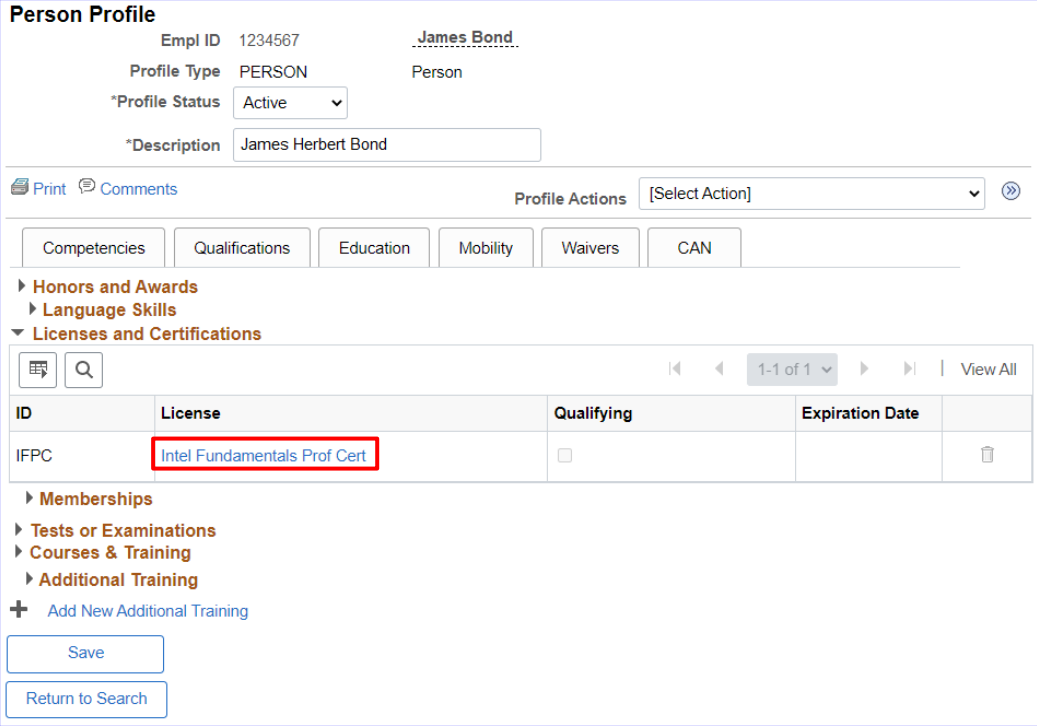**Information**   The user must have the **CG_LICCERT_V** role to access this component.

Procedures   See below.

Step	Action
1	Click on the **Core HR** Tile. Core HR
1.5	Select the **Person Profiles** option. Job Data Person Profiles Emergency Contact PHS Member Info Report Personal Data Statement of Creditable Svc Identification Data Disciplinary Actions Disciplinary Action Report
2	Enter the **Empl ID** and click **Search**. The Correct History box is auto-checked. **Person Profiles** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Search Criteria Empl ID begins with 1234567 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

Viewing a License/Certification, Continued

Procedures,
continued

Step	Action
3	The Competencies tab will display. Select the **Qualifications** tab. **Person Profile** Empl ID 1234567 James Bond Profile Type PERSON Person *Profile Status Active *Description James Herbert Bond Print Comments Profile Actions [Select Action] Competencies **Qualifications** Education Mobility Waivers CAN ▼ **Competencies**
4	Scroll to the member's Licenses and Certifications section. Click the **License** link to view the additional information. **Person Profile** Empl ID 1234567 James Bond Profile Type PERSON Person *Profile Status Active *Description James Herbert Bond Print Comments Profile Actions [Select Action] Competencies Qualifications Education Mobility Waivers CAN ▶ **Honors and Awards** ▶ **Language Skills** ▼ **Licenses and Certifications** 1-1 of 1 View All **ID** **License** **Qualifying** **Expiration Date** IFPC Intel Fundamentals Prof Cert ☐ ▶ **Memberships** ▶ **Tests or Examinations** ▶ **Courses & Training** ▶ **Additional Training** ✚ Add New Additional Training Save Return to Search

Viewing a License/Certification, Continued
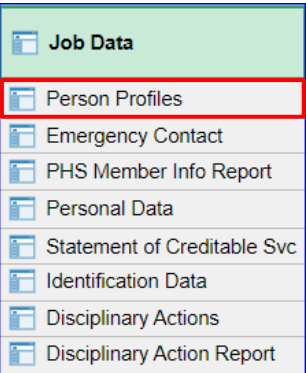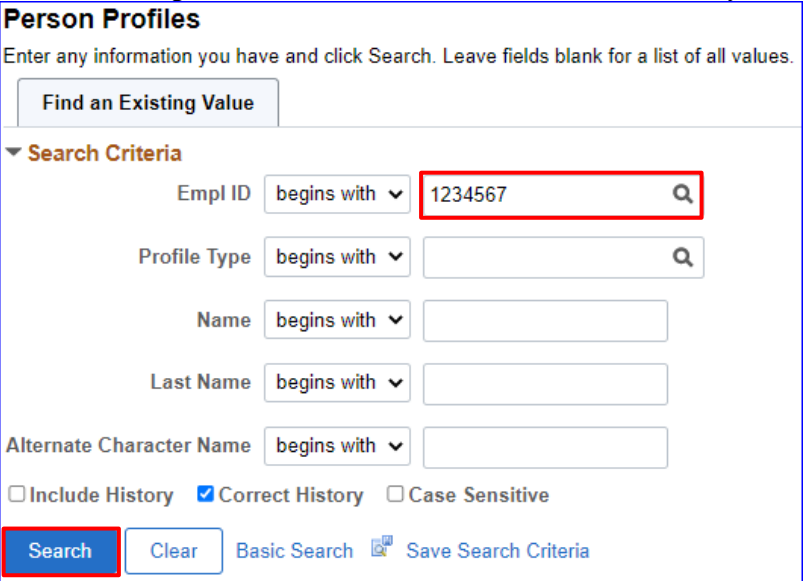
Procedures, continued

Step	Action
5	The View Licenses and Certifications page will display. Click **Cancel** to return to the member's Person Profile screen.

Adding a New License/Certification

Introduction	This section provides the procedures for adding a License/Certification in DA.

Information	The user must have the **CG_LICCERT_U** role to access this component.

Procedures	See below.

Step	Action
1	Click on the **Core HR** Tile.
1.5	Select the **Person Profiles** option.
2	Enter the **Empl ID** and click **Search**. The Correct History box is auto-checked.

Adding a New License/Certification, Continued

Procedures, continued

Step	Action
3	The Competencies tab will display. Select the **Qualifications** tab.
4	Click the **Add New Licenses and Certifications** link.

Adding a New License/Certification, Continued
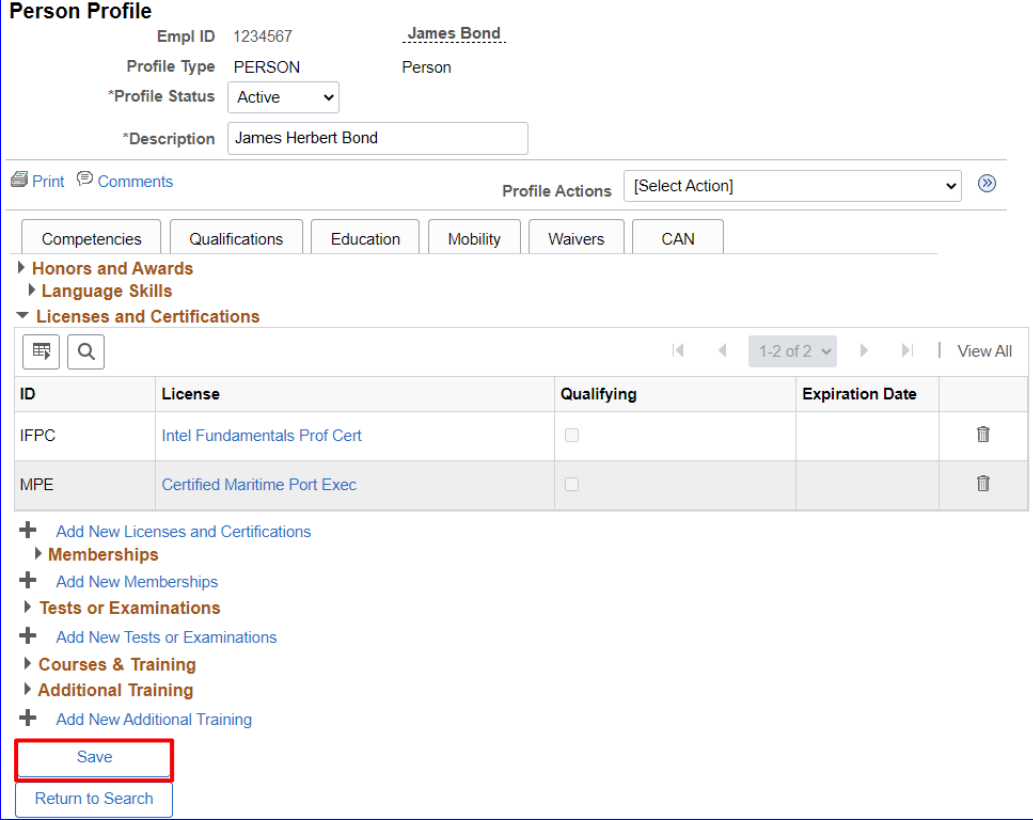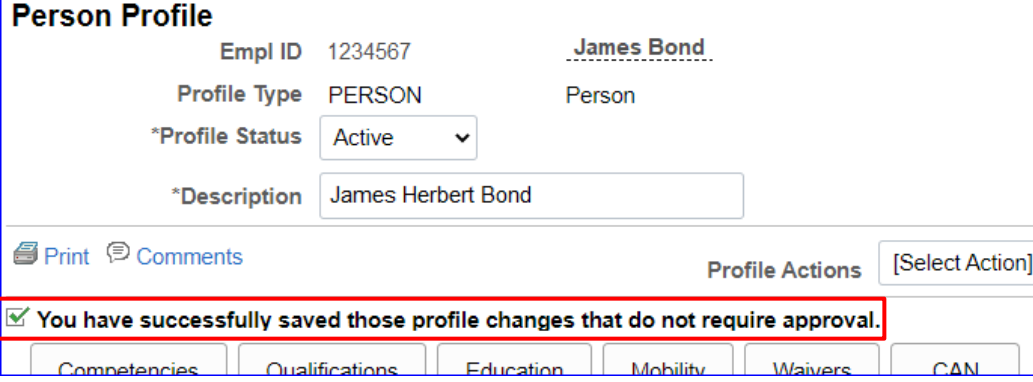
Procedures,
continued

Step	Action
5	The Add New Licenses & Certifications page will display. Enter the required fields: • **Issue Date** – Defaults to the current date. Enter the date the License or Certification was issued. • **License** – Enter the type of License or use the lookup to select one. • **Status** – Leave as Active. • **Country** Defaults to USA. If not USA, use the lookup to select a different country (if necessary). • **State** – Enter the State abbreviation or use the lookup. • **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/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 (Department of Agriculture, USCG TRACEN, Cape May, American Red Cross, etc.). When complete, click **OK** or **Apply and Add Another** (if applicable).

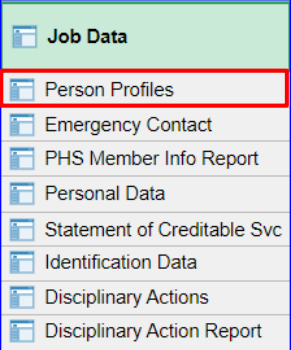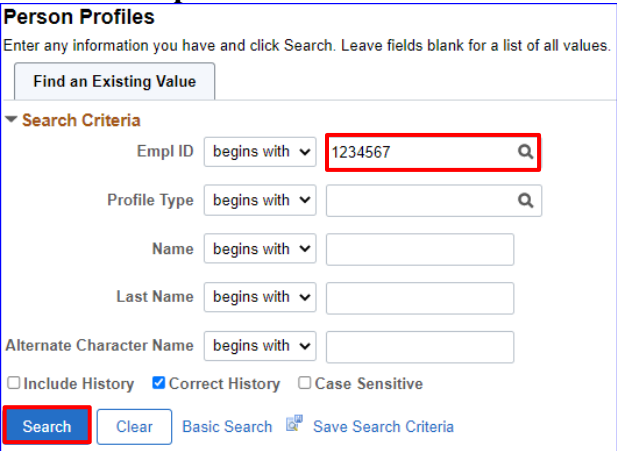# Adding a New License/Certification, Continued

Procedures,
continued

Step	Action
6	Click **Save**.
7	Once saved, this **message** will display.

Adding Additional License/Certification (same type)

Introduction   This section provides the procedures for adding an Additional License/Certification of the same type in DA.

Information
- The user must have the **CG_LICCERT_U** role to access this component.
- The system does not allow the entry of duplicate items in a member's profile. If a license or certification is entered with an Issue Date that already exists in a member's profile, an error message will display. A different Issue Date must be entered to resolve the error.
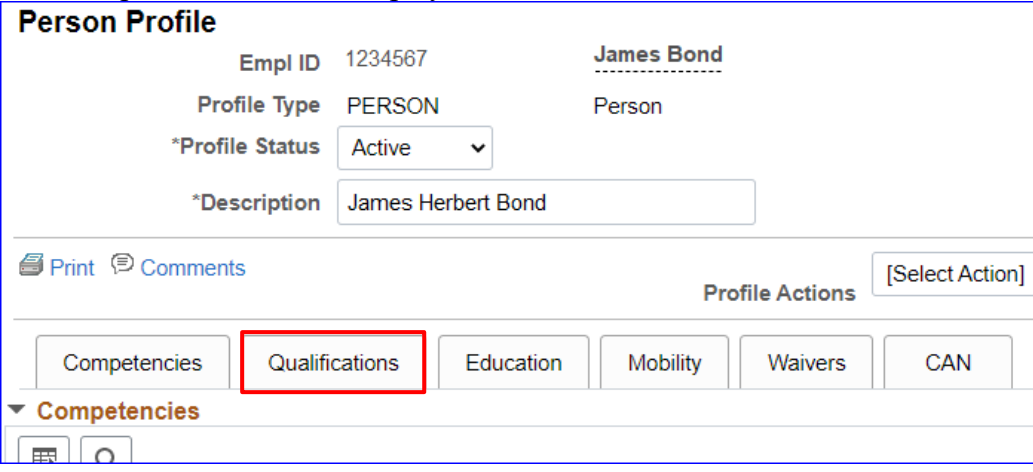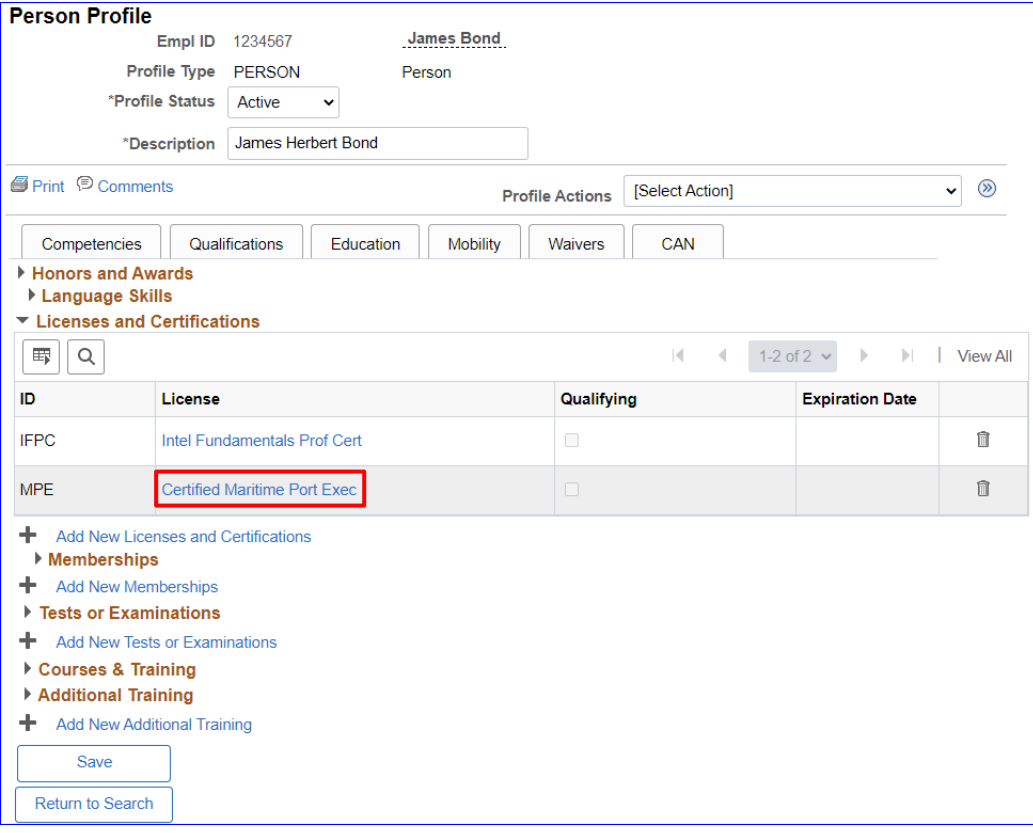
Procedures   See below.

Step	Action
1	Click on the **Core HR** Tile.
1.5	Select the **Person Profiles** option.
2	Enter the **Empl ID** and click **Search**. The Correct History box is auto-checked.

Adding Additional License/Certification (same type),
Continued

Procedures,
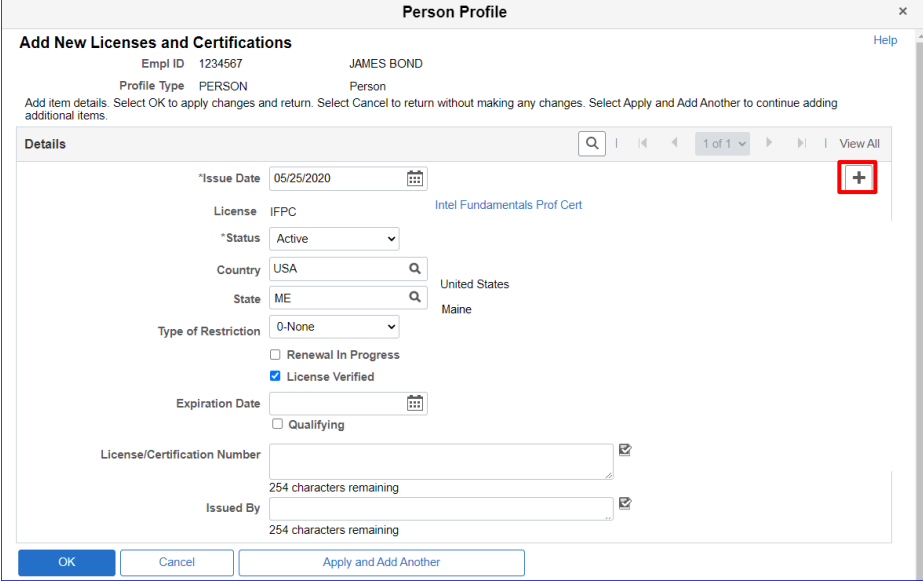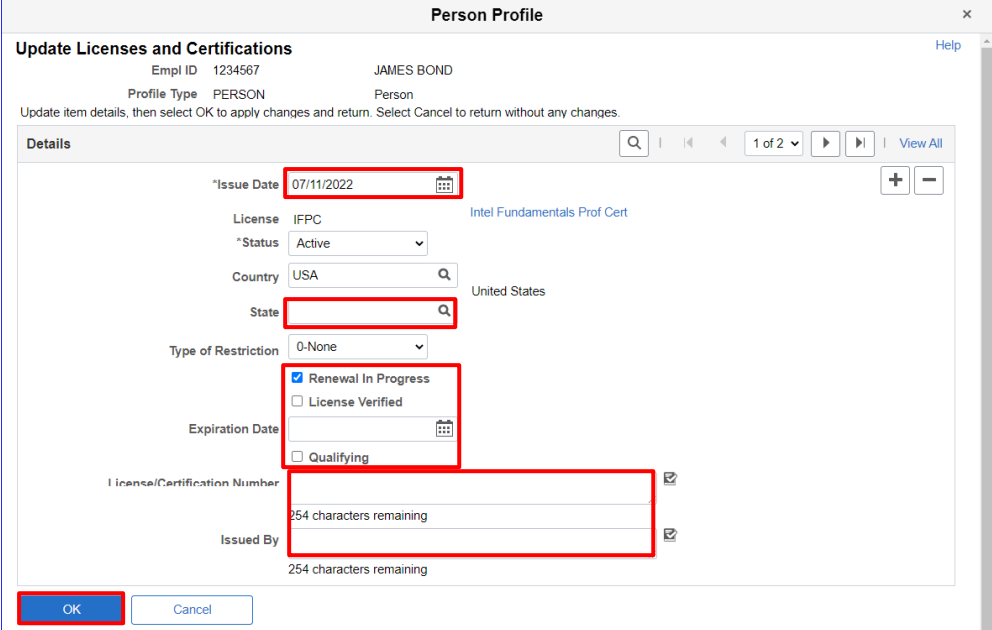continued

Step	Action
3	The Competencies tab will display. Select the **Qualifications** tab.
4	Select the **License** link for the one to be added to.

Adding Additional License/Certification (same type),
Continued

Procedures,
continued

Step	Action
5	The Add New Licenses and Certifications page will display. Click the **Plus** button.
6	Some field data will carry over from the previous row. The **Issue Date** defaults to the current date. Update the required **fields** (in this example, Renewal in Progress), then click **OK**.

Adding Additional License/Certification (same type),
Continued

Procedures,
continued
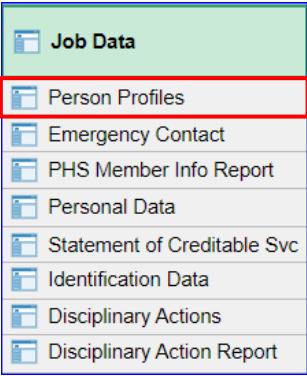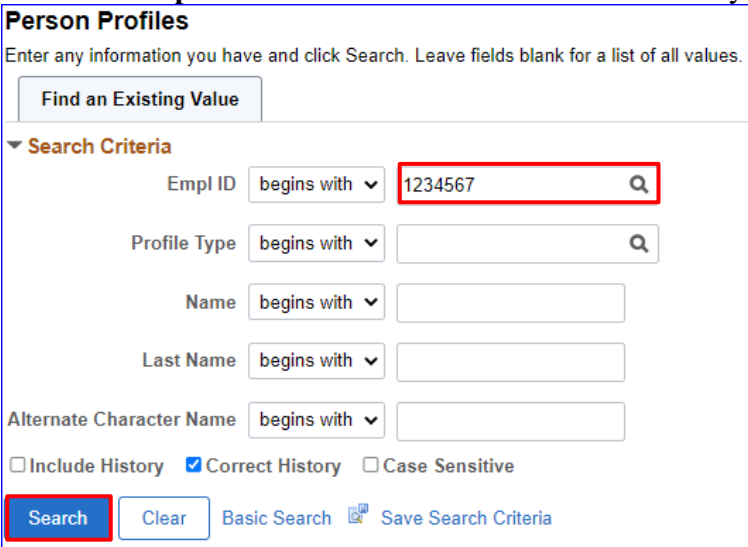
Step	Action
7	Notice the **View History** icon appears. Click **Save**.
8	Once saved, this **message** will display.

Correcting a License/Certification

Introduction	This section provides the procedures for correcting a License/Certification in DA.

Information	The user must have the **CG_LICCERT_U** role to access this component.

Procedures	See below.

Step	Action
1	Click on the **Core HR** Tile.
1.5	Select the **Person Profiles** option.
2	Enter the **Empl ID** and click **Search**. The Correct History box is auto-checked.

Correcting a License/Certification, Continued

Procedures,
continued

Step	Action
3	The Competencies tab will display. Select the **Qualifications** tab.
4	Select the **License** link that is to be updated or corrected. If the member has received the license multiple times, be sure to select the correct record.

Correcting a License/Certification, Continued

Procedures,
continued

Step	Action
5	The Update Licenses and Certifications page will display. **Person Profile** × **Update Licenses and Certifications** Help Empl ID 1234567 JAMES BOND Profile Type PERSON Person Update item details, then select OK to apply changes and return. Select Cancel to return without any changes. **Details** 🔍 ⏮ ◀ 1 of 1 ▼ ▶ ⏭ View All *Issue Date 07/11/2022 📅 ➕ License MPE Certified Maritime Port Exec *Status Active
7	Correct the appropriate **fields** (in this example, the Issue Date) and click **OK**. **Person Profile** × **Update Licenses and Certifications** Help Empl ID 1234567 JAMES BOND Profile Type PERSON Person Update item details, then select OK to apply changes and return. Select Cancel to return without any changes. **Details** 🔍 ⏮ ◀ 1 of 1 ▼ ▶ ⏭ View All *Issue Date 07/13/2022 📅 ➕ License MPE Certified Maritime Port Exec *Status Active Country USA 🔍 United States State 🔍 Type of Restriction 0-None ☑ Renewal In Progress ☐ License Verified Expiration Date 📅 ☐ Qualifying License/Certification Number 254 characters remaining Issued By 254 characters remaining **OK** Cancel

Continued on next page

Correcting a License/Certification, Continued

Procedures,
continued

Step	Action
8	Click **Save**. **Person Profile** Empl ID 1234567 — James Bond Profile Type PERSON — Person *Profile Status Active *Description James Herbert Bond Print Comments — Profile Actions [Select Action] Competencies / Qualifications / Education / Mobility / Waivers / CAN ▸ Honors and Awards ▸ Language Skills ▾ Licenses and Certifications 1-2 of 2 — View All **ID** / **License** / **Qualifying** / **Expiration Date** / **View History** IFPC / Intel Fundamentals Prof Cert / ☐ / / 🗎 / 🗑 MPE / Certified Maritime Port Exec / ☐ / / / 🗑 ➕ Add New Licenses and Certifications ▸ Memberships ➕ Add New Memberships ▸ Tests or Examinations ➕ Add New Tests or Examinations ▸ Courses & Training ▸ Additional Training ➕ Add New Additional Training Save Return to Search
9	Once saved, this **message** will display. **Person Profile** Empl ID 1234567 — James Bond Profile Type PERSON — Person *Profile Status Active *Description James Herbert Bond Print Comments — Profile Actions [Select Action] ☑ You have successfully saved those profile changes that do not require approval. Competencies / Qualifications / Education / Mobility / Waivers / CAN

Deleting a License/Certification

Introduction　This section provides the procedures for deleting a single License/Certification in DA.

Information
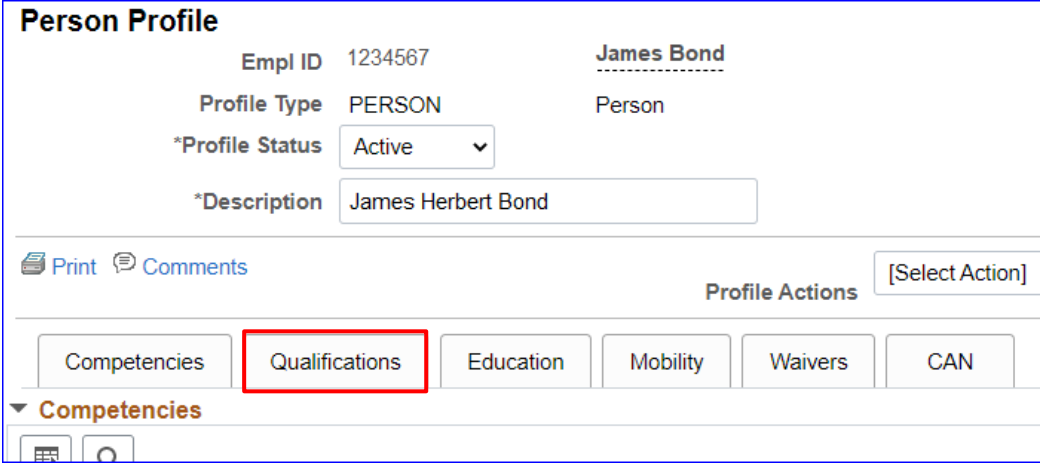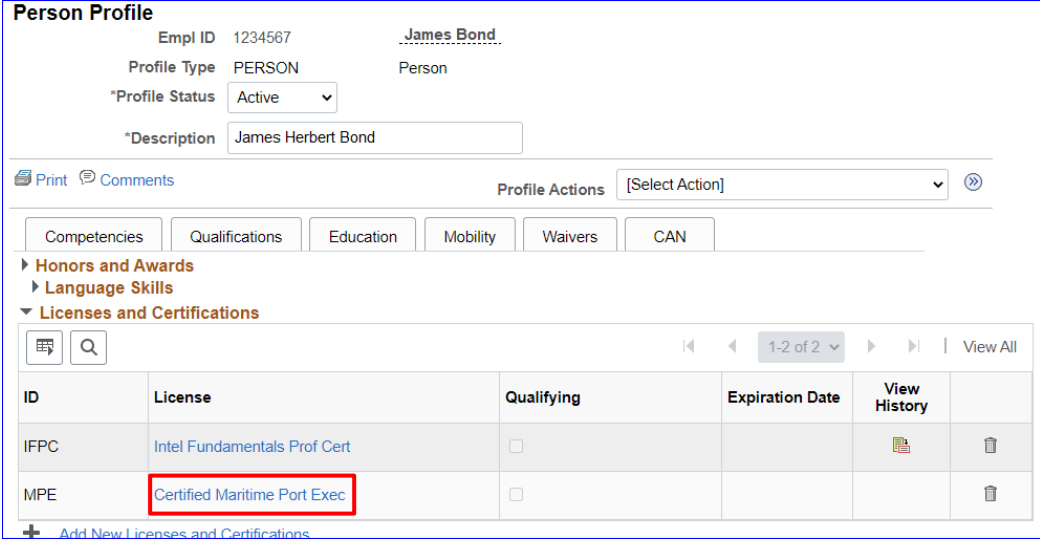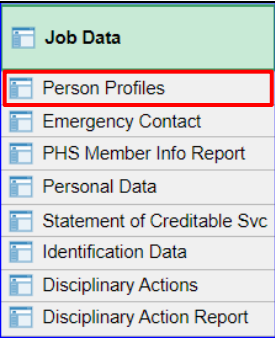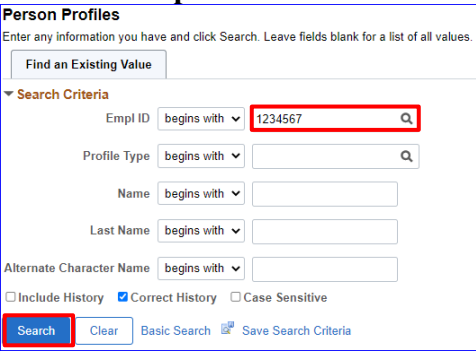- The user must have the **CG_LICCERT_U** role to access this component.
- As with any delete function, use extreme caution when deleting transactions. It is possible to delete the wrong row or rows, especially if there are multiple instances of the same License/Certification. If a row is erroneously deleted, it will have to be recreated.

- **NOTE:** If this is a License/Certification that was just entered, the minus button used to delete some rows 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.
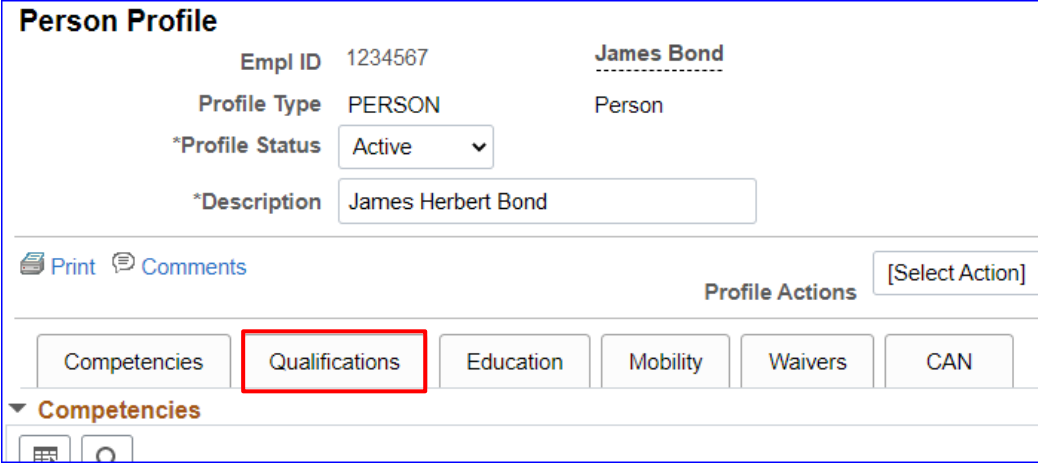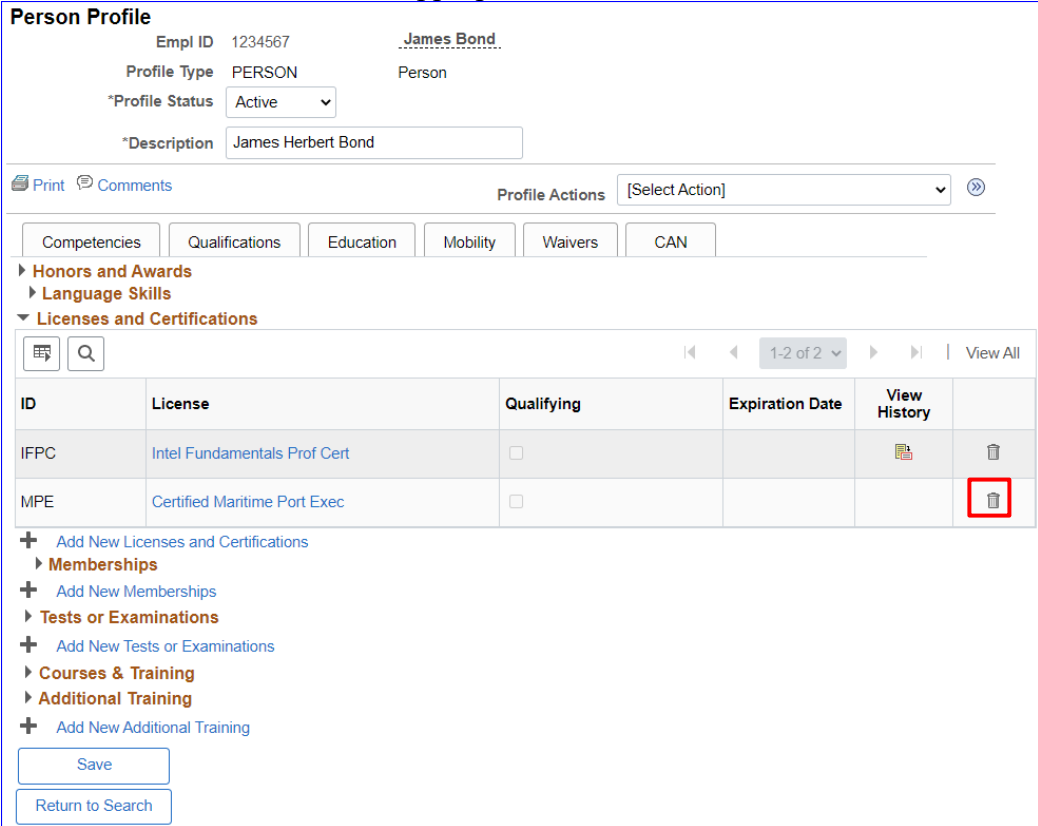
Procedures　See below.

Step	Action
1	Click on the **Core HR** Tile.
1.5	
2	Enter the **Empl ID** and click **Search**. The Correct History box is auto-checked.

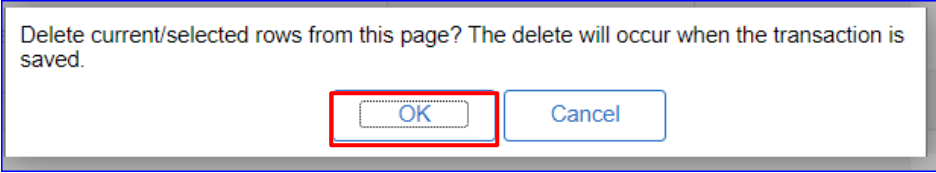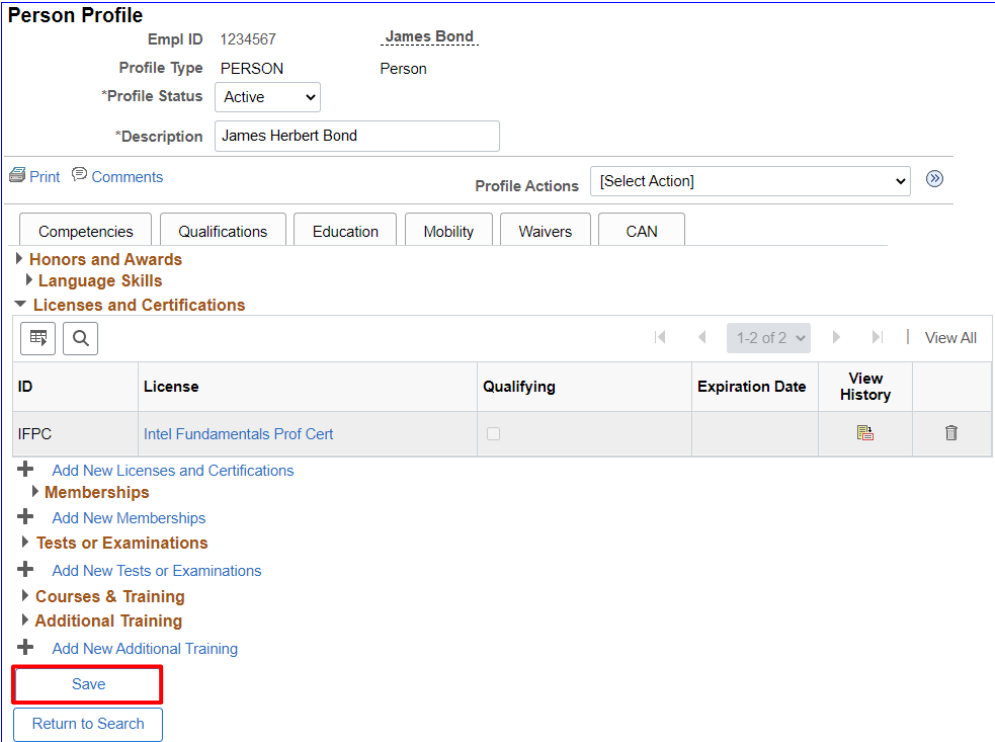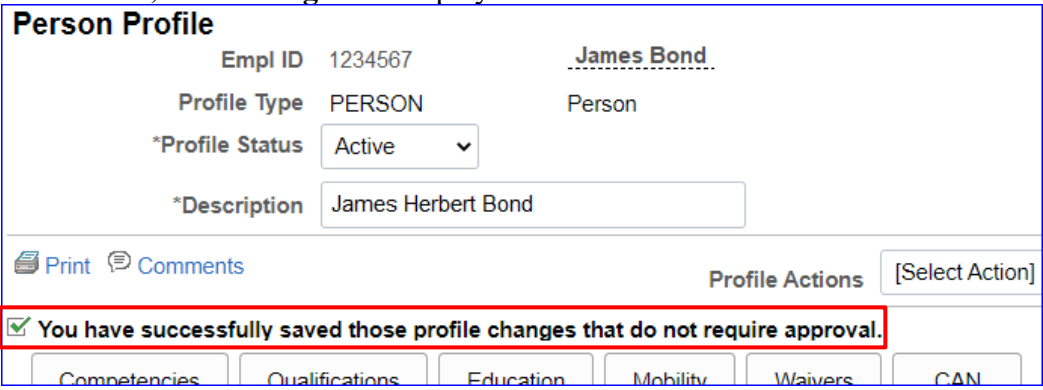# Deleting a License/Certification, Continued

Procedures,
continued

Step	Action
3	The Competencies tab will display. Select the **Qualifications** tab.
4	Click the **trashcan** icon on the appropriate row.

Deleting a License/Certification, Continued

Procedures,
continued

Step	Action
5	This message will display. Click **OK**. Delete current/selected rows from this page? The delete will occur when the transaction is saved. [OK] [Cancel]
6	Click **Save**. **Person Profile** Empl ID 1234567 James Bond Profile Type PERSON Person *Profile Status Active *Description James Herbert Bond Print Comments Profile Actions [Select Action] Competencies	Qualifications	Education	Mobility	Waivers	CAN ▶ Honors and Awards ▶ Language Skills ▼ Licenses and Certifications 1-2 of 2 View All ID	License	Qualifying	Expiration Date	View History IFPC	Intel Fundamentals Prof Cert			 + Add New Licenses and Certifications ▶ Memberships + Add New Memberships ▶ Tests or Examinations + Add New Tests or Examinations ▶ Courses & Training ▶ Additional Training + Add New Additional Training Save Return to Search
7	Once saved, this **message** will display. **Person Profile** Empl ID 1234567 James Bond Profile Type PERSON Person *Profile Status Active *Description James Herbert Bond Print Comments Profile Actions [Select Action] ☑ You have successfully saved those profile changes that do not require approval. Competencies	Qualifications	Education	Mobility	Waivers	CAN

Deleting One License/Certification when Multiple Instances Exist

Introduction   This section provides the procedures for deleting one License/ Certification when multiple instances exist in DA.

Information
- The user must have the **CG_LICCERT_U** role to access this component.
- As with any delete function, use extreme caution when deleting transactions. It is possible to delete the wrong row or rows, especially if there are multiple instances of the same License/Certification. If a row is erroneously deleted, it will have to be recreated.

- **NOTE:** To prevent unintentional deletions of Licenses and Certifications, the trashcan functionality for multiple Licenses and Certifications of one type has been disabled. The following messages will display if you attempt to delete multiple Licenses and Certifications at one time (Click **OK**.):

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

| OK | Cancel |

You cannot delete an item with Multiple instances. You MUST delete them individually in the details page.
The PeopleCode program executed an Error statement, which has produced this message.

| OK |

Procedures   See below.

Step	Action
1	Click on the **Core HR** Tile. Core HR

Deleting One License/Certification when Multiple Instances Exist, Continued

Procedures, continued

Step	Action
1.5	Select the **Person Profiles** option
2	Enter the **Empl ID** and click **Search**. The Correct History box is auto-checked
3	The Competencies tab will display. Select the **Qualifications** tab.

Deleting One License/Certification when Multiple Instances Exist, Continued

Procedures, continued

Step	Action
4	Select the **License** link that needs to be deleted.
5	The Update Licenses and Certifications page will display. Scroll through the rows using the **Arrows** or click **View All** to find the correct row to delete.
6	Once the correct row has been located, click the **Minus** button.

Continued on next page

Deleting One License/Certification when Multiple Instances Exist, Continued
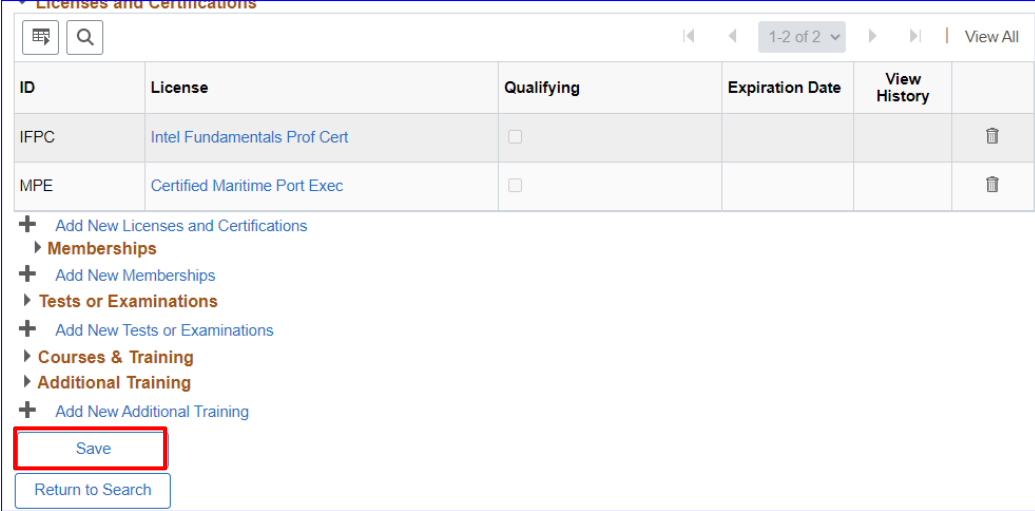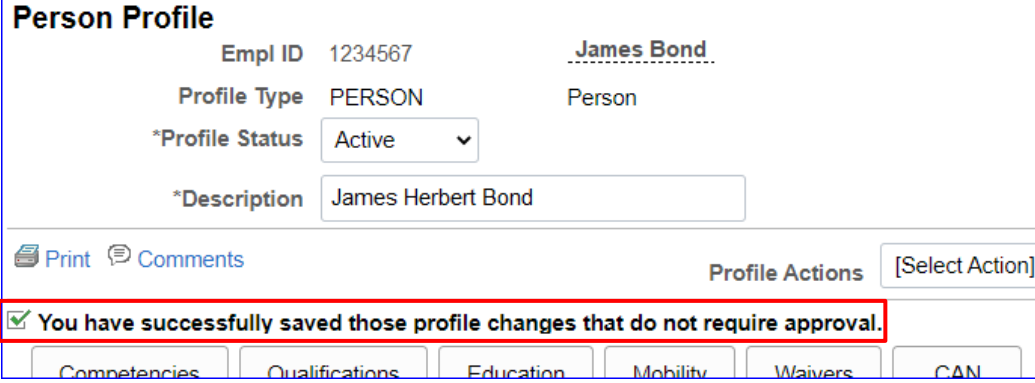
Procedures,
continued

Step	Action
7	This message will appear. Click **OK**. Delete current/selected rows from this page? The delete will occur when the transaction is saved. OK Cancel
8	Notice the **row** updated to 1 of 1 (in this example). Click **OK**. **Person Profile** × **Update Licenses and Certifications** Help Empl ID 1234567 JAMES BOND Profile Type PERSON Person Update item details, then select OK to apply changes and return. Select Cancel to return without any changes. Details 🔍 I ◀◀ ◀ 1 of 1 ▾ ▶ ▶▶ I View All + − *Issue Date 03/10/2021 📅 License IFPC Intel Fundamentals Prof Cert *Status Active Country USA 🔍 United States State 🔍 Type of Restriction 0-None ☐ Renewal In Progress ☑ License Verified Expiration Date 📅 ☐ Qualifying License/Certification Number 254 characters remaining Issued By 254 characters remaining OK Cancel

Deleting One License/Certification when Multiple Instances Exist, Continued

Procedures,
continued

Step	Action
9	Notice the **View History** icon was removed (in this example). Click **Save**. ![Licenses and Certifications table showing IFPC Intel Fundamentals Prof Cert and MPE Certified Maritime Port Exec entries with 1-2 of 2, View All, and Save button highlighted in red, plus Return to Search button] Licenses and Certifications 1-2 of 2 | View All ID / License / Qualifying / Expiration Date / View History IFPC / Intel Fundamentals Prof Cert MPE / Certified Maritime Port Exec + Add New Licenses and Certifications ▸ Memberships + Add New Memberships ▸ Tests or Examinations + Add New Tests or Examinations ▸ Courses & Training ▸ Additional Training + Add New Additional Training Save Return to Search
10	Once saved, this **message** will display. **Person Profile** Empl ID 1234567 James Bond Profile Type PERSON Person *Profile Status Active *Description James Herbert Bond 🖶 Print 💬 Comments Profile Actions [Select Action] ☑ **You have successfully saved those profile changes that do not require approval.** Competencies Qualifications Education Mobility Waivers CAN