

U.S. Department of Energy
Employee Self Service



Key to Your Information Universe

Project Management Career Development Program

ESS Tutorial

July 2007

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The Project Management Career Development Program (PMCDP)

The Project Management Career Development Program (PMCDP) has been developed in response to recommendations by the National Academy of Science's National Research Council as contained in their report, *Improving Project Management in the Department of Energy* (June 1999). In a January 17, 2001 memorandum, the former Deputy Secretary directed the Office of Engineering and Construction Management (OECM) within the Office of Management, Budget, and Evaluation to develop the PMCDP. The development of the PMCDP supports the President's Management Agenda in the area of Strategic Human Capital Management. The implementation of this program will considerably strengthen the capability of the Department's project management workforce and will thereby enhance the Department of Energy's (DOE's) ability to successfully perform projects.

Tutorial Purpose

This document has been developed to assist participants in using ESS for managing his or her participation in the PMCDP.

PMCDP Participants

The PMCDP applies to all incumbent DOE federal project directors, employees desiring to be on a project management career path, and others whose positions require him or her to provide management direction, oversight, or matrix support to DOE federal project directors.

PMCDP Certification

There are four levels of certification in the PMCDP. Each level has associated competencies (supporting knowledge and skills). Participants have access to all competencies associated with the program. Fulfillment of a competency may be obtained by (1) declaring an equivalency, or (2) declaring the competency as a developmental need, and then completing the associated training or developmental activity. The participant must choose an approving official, such as a supervisor/manager, office/site manager, or subject matter expert, to approve the participant's attainment of a competency. Participants should follow site/office specific policy and procedure for designation of approving officials. Use of a subject matter expert to approve a competency is optional and must be delegated or directed by the cognizant program secretarial office or field office manager. When a participant has completed entering information for a PMCDP competency, an electronic mail message is automatically generated and sent to the participant's approving official who reviews the competency information. Based on the information provided by the participant, the request is approved, disapproved, or designated as pending.

Waivers can only be requested for fulfillment of a single competency, or a whole certification level. If a waiver has been requested, the site/field office manager and the Certification Review Board (CRB) must approve the waiver as well. Participants can obtain approval for a competency at any level.

Certification for a level can only be obtained when approval has been granted for all competencies within a level (i.e., all 19 competencies must be approved to obtain Level 1 certification and Level 1 certification must be approved prior to obtaining Level 2 certification).

A certification request form must be completed and sent to the appropriate approving officials, as well as the site/office manager.

Equivalency for a Competency

An equivalency is defined as the necessary skills and knowledge for competency in the specific area, gained through previous coursework, on the job training, and/or experience. PMCDP emphasizes project management development and experience. Entry of detailed experiential and training information must be included for each competency. See PMCDP Equivalency and Certification Guide: click on PMCDP Menu, “Cert and Equivalency Guidelines.”

Association with PMCDP

The PMCDP training module resides on the Corporate Human Resource Information System (CHRIS). Therefore, you must be associated with the module by your appropriate human capital management personnel, rather than through your training coordinators.

Site personnel should contact his or her supervisor and/or his or her administrative officer and request to be associated with the PMCDP. The human capital representative should follow site/office procedure for associating personnel in CHRIS.

Headquarters personnel should contact his or her respective office supervision and request to be associated with the PMCDP. The supervisor should follow the Program Element procedure for associating personnel in CHRIS.

Generally, person(s) with administrator access at your site/program office that have authority to make changes to your Employee Self-Service (ESS) account must manually associate your job position number to the PMCDP training module.

In order to advance to higher levels of certification, you should check your profile to ensure that you are associated with the correct level. If you are not associated to the appropriate level, contact your human capital management representative as described above.

Employee Self Service

The ESS web site supports the PMCDP by providing a central repository and tracking system on matters related to PMCDP training and certification. Employees can update/review his or her individual competencies, request PMCDP certification, and request continuing education (CE) credit hours using ESS. Supervisors, managers, and/or subject matter experts can review and approve competencies and certification requests through ESS.

1. Access the ESS web site: <https://mis.doe.gov/ess>

2. Click on “Login.”

3. Enter your SSN or CHRIS Employee ID and password.

4. Click on “Authenticate Me.”

.....
● Click on the tab at the top of the page marked “PMCDP.” If you receive an error message stating
● that you are not associated with the PMCDP, see your immediate supervisor or administrative
● officer to discuss your site/office procedures for enrollment in the program. (See “Association
● with the PMCDP,” page 2 of this tutorial).
.....

Menu Options

Click on the tab marked “PMCDP” for a listing of available options in the module.

Introduction
Instructions (pdf)
Cert and Equivalency Guidelines (pdf)
Access corporate reports
Set PMCDP profile
Identify managers
Maintain project history
Enter supporting information
Review/update competencies
Supervisor/Site Review Report
CE Hour Request Status Report
Competency Status Report
Equivalency Summary Report
Waiver Summary Report
Certification Request Form
Continuing Education Hour Request Form
PSO Notification/Review Request Form
Approving Official/Manager Options
- Review/approve emp competencies
- Review/approve cert level requests
- Review/approve CE Hour requests

- ❖ **Introduction:** You may view a brief narrative introduction targeted to either PMCDP participant or the applicable approving official.

[Text-only menu](#)

Project Management Career Development Program for

For PMCDP participants:

- ◆ Click on 'Set PMCDP profile' in the PMCDP menu to enter your project management experience, project history and any additional supporting information.
- ◆ After your profile is updated, click on 'Review/update competencies' in the PMCDP menu to develop or justify core PMCDP competencies.
- ◆ Click on 'Supervisor/Site Review Report' to view the full report needed for CRB certification.
- ◆ Once you have completed competencies requirements at a particular level, use the 'Certification Request Form' to request an interview and managerial approval for your level of certification.
- ◆ **If you need to associate your position to a different PM level, please contact your servicing personnel office.**

For designated approving officials/managers:

- ◆ Click on the appropriate link to approve employees' competency or certification requests for approval.

- ❖ **Instructions:** You may view the tutorial for the PMCDP CHRIS/ESS module.
- ❖ **Certification and Equivalency Guidelines:** You may view the most current version of the PMCDP certification guideline.
- ❖ **Set PMCDP Profile:** The first step in the entry of PMCDP information. Before entering individual competencies, all PMCDP participants must first establish his or her profile. You will enter information regarding your required certification level, project management experience, participant category, program/staff office, and site office/location.
- ❖ **Identify Managers:** The second step in the entry of PMCDP information. You must identify your approving officials. These should include your immediate supervisor, the site/office manager and any other persons required by your Program Secretarial Office (PSO) protocol.
- ❖ **Maintain Project History:** The third step in the entry of PMCDP information. You will enter current and past project history relevant to project management. You may enter as many projects as you wish. At a minimum, you must enter at least the last 10 years of your project history. You are encouraged to enter all project management experience, so that the breadth of your experience will be made know to the certifying official and the PMCDP Certification Review Board.
- ❖ **Enter Supporting Information:** The fourth step in the entry of PMCDP information. The use of the notepad is optional. A 4,000-character notepad has been provided for you to enter any additional or clarifying information. This is in addition to provided comment boxes for each competency.

- ❖ **Review/Update Competency:** Once you have entered all your background information and project history, chosen approving officials, and entered any supplemental information, you may begin entering your competency information. Each level of certification has specific knowledge, skill, and ability competencies that must be fulfilled through training, education, and/or experience. Each competency must be addressed and approved. Once you have entered your initial competency information, you may update it at any time. Major changes will require the updated information to be approved by your chosen approval official.
- ❖ **Supervisor/Site Review Report:** All of the data entered under project history and competencies will be placed into this report. This report is the document that will be presented to the PMCDP Certification Review Board for consideration of your certification request.
- ❖ **CE Hour Request Status Report:** This report lists all CE hour requests and the respective status in the approval process. You may view your original request from this report.
- ❖ **Competency Status Report:** This report lists all PMCDP competencies, summarizes all the entered information, and the approval status.
- ❖ **Equivalency Summary Report:** This report lists all the PMCDP competencies and the applicable equivalency justification.
- ❖ **Waiver Summary Report:** This report lists all the PMCDP competencies for which a waiver is requested and all supporting information.
- ❖ **Certification Request Form:** This form must be completed and submitted electronically to the approving official(s) [first line and site/office managers as a minimum], in accordance with your program office protocol, in order to be considered for certification by the Certification Review Board.
- ❖ **Continuing Education Hour Request Form:** Certified federal project directors are required to maintain his or her certification through continuing education (CE). The requirement is for 60 CE hours every 2 years. This electronic form must be completed and submitted to the approving official(s) and OECM in order to be granted CE hours towards the CE requirement.
- ❖ **PSO Notification Review Request Form:** Once the first line and site/office manager approval has been obtained, the Program Secretarial Official (PSO) should be notified that the profile is ready to be presented to the PMCDP Certification Review Board. Most PSOs require notification. If a PSO does not require such notification, the participant is required to select “No program official (PSO) notification/review required” on this form. All profile packages for certification consideration must be presented to the Certification Review Board by the permanent or Ad Hoc program representative to the board.

Approving Official/Manager Options:

- ❖ **Review/Approve Employee Competencies:** The approving official is required to respond to all requests for a PMCDP certification competency review. The approving official may approve, disapprove, or put the request on hold, pending further review and/or evaluation.
- ❖ **Review/Approve Certification Level Requests:** The approving official is required to respond to all requests for PMCDP certification. The approving official may approve, disapprove, or put the request on hold, pending further review and/or evaluation.
- ❖ **Review/Approve CE Hour Requests:** The approving official is required to respond to all requests for PMCDP CE hours. The approving official may approve, disapprove, or put the request on hold, pending further review and/or evaluation.

Step 1, Background Information

Before entering individual competencies, you must first establish your profile and enter your background information.

1. Click on the “PMCDP” menu item at the top of the page.

2. Select “Set PMCDP profile.”

3. A screen with the header “Step 1: Enter background information” will be presented. You must select a level of certification, enter years of project management experience, select your priority category, and select your Program Secretarial Office (PSO)/Staff Office, as well as your Site Office/Location.

Step 1: Enter background information

Instructions (updated 06/28/2007): Select your requested level of certification, enter your total years of project management experience 1) within DOE, 2) in other federal agencies and 3) in the private sector, along with your current PM applicant category status and your PSO and site office information. Click on the **“Save and Continue”** button at the bottom of this form when finished. You will then be directed to identify your managers.

*-Required fields

Level of certification requested: * ▾

Years of project management experience - DOE: *

Years of project management experience - other federal agencies:

Years of project management experience - in private sector:

Applicant Priority category: * ▾

PSO/Staff Office: * ▾

Site Office/Location: * ▾

- 4. Select the required level of certification, in accordance with your PSO policy and protocol.

If an FPD is managing a portfolio of projects, the required FPD certification level is determined by the project with the highest TPC dollar value.

PM Level 1: Responsible for projects with TPC between \$5M and \$20M.

PM Level 2: Responsible for projects with TPC between \$20M and \$100M.

PM Level 3: Responsible for projects with TPC between \$100M and \$400M.

PM Level 4: Responsible for projects with TPC exceeding \$400M.

Click the down arrow to the right of "Level of certification requested" field and choose one.

Step 1: Enter background information

Instructions (updated 06/28/2007): Select your requested level of certification, enter your total years of project management experience 1) within DOE, 2) in other federal agencies and 3) in the private sector, along with your current PM applicant category status and your PSO and site office information. Click on the "Save and Continue" button at the bottom of this form when finished. You will then be directed to identify your managers.

*-Required fields

Level of certification requested: *



5. Project management experience from any source will be considered towards your PMCDP experiential requirements. The only required experience entry is for time spent as a project manager/director for DOE. Other federal agencies and private sector experiences are optional. However, if you are claiming this non-DOE experience for completion of a competency, it must be included in the project history. To enter your project experience, do the following:

- ❖ Enter the number of years of DOE project management experience in the “Years of project management experience - DOE” field (required). Only enter the number, not any text.

*-Required fields

Years of project management experience - DOE:*	<input type="text" value="19"/>
Years of project management experience - other federal agencies:	<input type="text" value="12"/>
Years of project management experience - in private sector:	<input type="text" value="0"/>

- ❖ Enter the number of years of project management experience in other federal agencies in the “Years of project management experience – other federal agencies” field, if applicable (optional). Only enter the number, not any text.

*-Required fields

Years of project management experience - DOE:*	<input type="text" value="19"/>
Years of project management experience - other federal agencies:	<input type="text" value="12"/>
Years of project management experience - in private sector:	<input type="text" value="0"/>

- ❖ Enter the number of years of project management experience in the private sector in the “Years of project management experience – private sector” field, if applicable (optional). Only enter the number, not any text.

*-Required fields

Years of project management experience - DOE:*	<input type="text" value="19"/>
Years of project management experience - other federal agencies:	<input type="text" value="12"/>
Years of project management experience - in private sector:	<input type="text" value="0"/>

- 6. You are required to select a priority category (e. an incumbent project director, a candidate, or other) Click the down arrow to the right of “Applicant Priority category” field to display a list of choices. Select the appropriate choice.

.....

Project Management Candidate is defined as someone aspiring to a project management career as a federal project director, or who previously held such a position, but who does not currently have a project for which he or she has been assigned primary responsibility (e.g., deputy project directors, assistant project directors, integrated project team members, and others who may desire or are encouraged to attain federal project director certification).

Project Management Incumbent is defined as someone who is currently assigned as the federal project director with primary responsibility for a capital asset.

Other is anyone who is taking courses, but has not been formally identified by management as an incumbent or candidate.

.....

*-Required fields

Level of certification requested: * ▾

Years of project management experience - DOE: *

Years of project management experience - other federal agencies:

Years of project management experience - in private sector:

Applicant Priority category: * ▾

PSO/Staff Office: * ▾

Site Office/Location: * ▾

- 7. You are required to identify your Program Secretarial Office (PSO)/Staff Office. Click the down arrow to the right of “PSO/Staff Office” field to display a list of choices. Select the appropriate choice.

*-Required fields

Level of certification requested: * ▾

Years of project management experience - DOE: *

Years of project management experience - other federal agencies:

Years of project management experience - in private sector:

Applicant Priority category: * ▾

PSO/Staff Office: * ▾

Site Office/Location: * ▾

- 8. You are required to identify your Site Office/Location. Click the down arrow to the right of “Site Office/Location” field to display a list of choices. Select the appropriate choice.

*-Required fields

Level of certification requested: * ▾

Years of project management experience - DOE: *

Years of project management experience - other federal agencies:

Years of project management experience - in private sector:

Applicant Priority category: * ▾

PSO/Staff Office: * ▾

Site Office/Location: * ▾

- 9. Select “Save and continue.”

Step 1: Enter background information

Instructions (updated 06/28/2007): Select your requested level of certification, enter your total years of project management experience 1) within DOE, 2) in other federal agencies and 3) in the private sector, along with your current PM applicant category status and your PSO and site office information. Click on the **“Save and Continue”** button at the bottom of this form when finished. You will then be directed to identify your managers.

*-Required fields

Level of certification requested: * ▾

Years of project management experience - DOE: *

Years of project management experience - other federal agencies:

Years of project management experience - in private sector:

Applicant Priority category: * ▾

PSO/Staff Office: * ▾

Site Office/Location: * ▾

- 10. You will automatically advance to Step 2.
-

Step 2, Identify Managers

Approving Officials must be identified to approve all competency and certification requests. This may be done by selecting "Identify your managers" from the PMCDP Menu, or you will automatically be advanced once you complete Step 1.

1. If this is your initial entry of information, you will automatically be advanced from Step 1 to Step 2. If you choose to enter this information separately, click on the "PMCDP" menu item at the top of the page. Select "Identify managers."

2. A screen requiring you to select your first line and overall site/office manager will be presented. There will be no person listed next to "Overall site/office manager" and "First line manger."

PMCDP Profile for

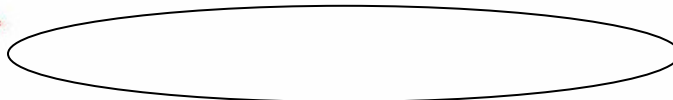
Step 2: Identify your managers

Instructions : Select your site's manager as well as your direct first line manager. Click on the "**Save and Continue**" button at the bottom of this form when finished. You will then be directed to the project history update page.

*-Required fields

Overall site/office manager:*

First line manager:*



[Change](#)

[Change](#)

Save and continue

3. Select overall site/office manager.
Click "Change" to select the appropriate DOE employee.

PMCDP Profile for

Step 2: Identify your managers

Instructions : Select your site's manager as well as your direct first line manager. Click on the "**Save and Continue**" button at the bottom of this form when finished. You will then be directed to the project history update page.

*-Required fields

Overall site/office manager: * [Change](#)

First line manager: * [Change](#)

4. A screen will be displayed that allows you to search for the name of your applicable site/office manager. Type in the name: Last,First (Example: Smith,John) (no space between comma and first name). Click "Submit."

PMCDP site manager search

Search by name (last,first):

NOTE: No space between comma and first name

Manager name:

If you have not properly identified the manager, an alert message will appear requesting you to go back and choose again.

- 5. You will be brought back to the “Step 2, Identify your managers” screen. The name you have just chosen will appear next to “Overall site/office manager.”

PMCDP Profile for

Step 2: Identify your managers

Instructions : Select your site's manager as well as your direct first line manager. Click on the "Save and Continue" button at the bottom of this form when finished. You will then be directed to the project history update page.

*-Required fields

Overall site/office manager:* [Change](#)
First line manager:* [Change](#)

Save and continue

- 6. Select first line manager.
There will be no person listed next to “First line manager.” Click “Change” to select the appropriate DOE employee.

PMCDP Profile for

Step 2: Identify your managers

Instructions : Select your site's manager as well as your direct first line manager. Click on the "Save and Continue" button at the bottom of this form when finished. You will then be directed to the project history update page.

*-Required fields

Overall site/office manager:* [Change](#)
First line manager:* [Change](#)

Save and continue

- 7. A screen will be displayed that allows you to search for the name of your applicable first line manager. Type in the name: Last,First (no space between comma and first name). Click "Submit."

PMCDP first line manager search

Search by name (last,first):
NOTE: No space between comma and first name

Manager name:

If you have not properly identified the manager, an alert message will appear requesting you to go back and choose again.

-
- 8. You will be brought back to the "Step 2, Identify your managers" screen. Both names that you have chosen will appear.

PMCDP Profile for

Step 2: Identify your managers

Instructions : Select your site's manager as well as your direct first line manager. Click on the "**Save and Continue**" button at the bottom of this form when finished. You will then be directed to the project history update page.

*-Required fields

Overall site/office manager: *

First line manager: *

[Change](#)
[Change](#)

If you need to change either of these fields, click on "Change" and repeat steps 4 & 5.

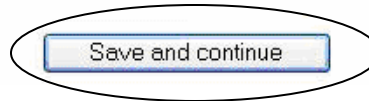
9. Select “Save and continue.”

Overall site/office manager:*

[Change](#)

First line manager:*

[Change](#)



-
10. You will automatically advance to Step 3.
-

Step 3, Project History

You must now enter details of your project history information. At a minimum, you must enter information for individual DOE projects you are currently working or have worked on over the past 10 years (or less) and any future projects on which you anticipate that you will work beginning within the upcoming year. This may be done by selecting “Maintain project history” from the PMCDP menu, or you will automatically advance once you complete Step 2.

- Once you have completed the background information, you will automatically be taken to an initial project history page titled: “Step 3: Maintain project history.” If you choose to enter this information separately, click on the “PMCDP” menu item, “Maintain project history.”

PMCDP Profile for

Step 3: Maintain project history

Sorted by date (Click on underlined column headings to change sort order)

The CRB requests that certification candidates please identify the following information for individual projects on which certification candidates are currently working or have worked on over the course of the past 10 years (if certification candidates wish to additionally identify projects worked on prior to 10 years ago, that is at his/her discretion). In addition, please identify future projects on which you anticipate that you will work beginning within a year.

[Add another project](#)

Action	<u>Project Name</u>	Position Title	<u>Total Project Cost (in millions)</u>	Overall Project Start Date	Overall Project End Date	Your Start Date on Project	Your End Date on Project	Project Description
Delete Update								View
Delete Update								View

Save and continue

Click on “Add another project.”

2. A screen for data entry on a project will be presented. You will enter each project separately. You may begin at the present time or with your first project managed. Required information is identified with a **red ***.

Add a project to your PMCDP profile

* - Required fields

Project name: *

Position title: *

Total project cost: (in millions; enter numbers only) *

Overall project start date: * (mm/dd/yyyy format)

Overall project end date: (mm/dd/yyyy format - leave blank if current project)

Your start date on the project: * (mm/dd/yyyy format)

Your end date on the project: (mm/dd/yyyy format - leave blank if still on project)

Specific role: * (4000 character limit)
 Include specific involvement during project life cycle schedule/decision phases (e.g., served as project manager during CD-0 through CD-1 from 7/95 through 9/97; served as project engineer during project closeout from 1/03 through 9/03; serve as federal project director during CD-4 project closeout from 9/03 to present).

3. Enter the name of the project managed in the “Project name” field (required).

Add a project to your PMCDP profile

* - Required fields

Project name: *

4. Enter your position title during management of the project in the “Position title” field (required).

Add a project to your PMCDP profile

* - Required fields

Project name: *

Position title: *

5. Enter the total project cost in the “Total project cost” field (required).

Note: **Enter only the whole number**; for example, a project with a total budgeted cost of \$147,850,000 would be rounded up and entered as 148. Costs are represented in millions of dollars. Do not enter “\$” or “M” or “K.”

Add a project to your PMCDP profile

* - Required fields

Project name: *

Position title: *

Total project cost: (in millions; enter numbers only) *

6. Overall Project Dates.

Enter the overall project start date in the “Project start date” field (mm/dd/yyyy) and the overall project end date in the “Project end date” field (mm/dd/yyyy). Leave this field blank if this is a current project.

Project name: *

Position title: *

Total project cost: (in millions; enter numbers only) *

Overall project start date: * (mm/dd/yyyy format)

Overall project end date: (mm/dd/yyyy format - leave blank if current project)

7. Your Participation Dates.

Enter the start date of your participation on the project in the “Your start date on the project” field (mm/dd/yyyy). Enter the end date of your participation on the project in the “Your end date on the project” field (mm/dd/yyyy). Leave this field blank if this is a current project.

Project name: *

Position title: *

Total project cost: (in millions; enter numbers only) *

Overall project start date: * (mm/dd/yyyy format)

Overall project end date: (mm/dd/yyyy format - leave blank if current project)

Your start date on the project: * (mm/dd/yyyy format)

Your end date on the project: (mm/dd/yyyy format - leave blank if still on project)

8. **Specific role.** This field has a 4,000-character limit.

Specific role: * (4000 character limit)
 Include specific involvement during project life cycle schedule/decision phases (e.g., served as project manager during CD-0 through CD- from 7/95 through 9/97; served as project engineer during project closeout from 1/03 through 9/03; serve as federal project director during CD-4 project closeout from 9/03 to present).

Enter details for the following categories of information on this project:

- a. Start and end date of your tenure.
- b. Location and current decision/project phase. If the project is not a DOE funded project, then please include the name of the organization/company and brief description of project. For current projects, please indicate the start date (mm/dd/yyyy) - present.
- c. Your specific project role(s) (e.g., project director, project manager, integrated project team member, program director, office director, program manager, Contracting Officer’s Representative (COR), scientist, engineer, architect, etc.) and very briefly describe project management activities that you conducted or are conducting in relation to your role in the project.
- d. Describe in detail your specific involvement during project life cycle (e.g., served as project manager from project design through closeout, served as project engineer during project closeout, served as COR/COTR for years three and four during the seven-year project life cycle, served as site supervisor for six months during the third year of the five-year project, as project scientist/engineer/program representative, served in the capacity of the project director during pre-project planning stages for one year, etc.).

(Continued on next page)

- e. The type of project, such as remediation, design/build, GPP, line item capital project, operating funded projects (including Major Items of Equipment), etc.
- f. Critical Decision (CD) phases the project progressed through while you were assigned, whether you were the only project director or shared responsibility with other project directors assigned to the project, if you were one of many assigned to the project, what were the specific areas for which you were responsible during the life cycle of the project, were you preceded or followed by other project director(s) and the dates you served on each CD phase (e.g., served as project manager during CD-0 through CD-1 from 7/95 through 9/97; served as project director during CD-3 construction from 1/03 through 9/03; serve as federal project director during CD-4 project closeout from 9/03 to present; or took the project through CD-0, and then were followed by others for the completion of the project, or took the project from CD-1 (2/02 – 5/03) through CD-2 (5/03-9/03) and CD-3 (9/03- 11/04) only and then others took it to CD-4).

-
9. Click on the “Save and continue” button after entering all the required information.



10. A screen with the header “PMCDP Profile for [Your Name], Step 3: Maintain project history” will appear stating that your project information has been added. Review the information and choose to update, delete, enter another project, view the project description, enter additional information, review/update competencies, advance to Step 4, or choose another option from the PMCDP Menu.

PMCDP Profile for

Step 3: Maintain project history

Sorted by date (Click on underlined column headings to change sort order)

The CRB requests that certification candidates please identify the following information for individual projects on which certification candidates are currently working or have worked on over the course of the past 10 years (if certification candidates wish to additionally identify projects worked on prior to 10 years ago, that is at his/her discretion). In addition, please identify future projects on which you anticipate that you will work beginning within a year.

Your project has been added.

[Add another project](#)

Action	<u>Project Name</u>	Position Title	<u>Total Project Cost (in millions)</u>	Overall Project Start Date	Overall Project End Date	Your Start Date on Project	Your End Date on Project	Project Description
[Delete] [Update]								[View]

If you have finished entering your projects and choose to advance to Step 4, click on “Save and continue” (below all the listed projects at the bottom of the screen).

11. You will automatically advance to Step 4.

Step 4, Supporting/Additional Information

The use of the notepad is optional. A 4,000-character notepad has been provided for you to enter any additional or clarifying information. This is in addition to comment boxes for each competency. This may be done by selecting "Supporting Information" from the PMCDP menu, or you will automatically advance once you complete Step 3.

1. Once you have completed the background information, you will automatically be taken to a screen with the header "PMCDP Profile for [Your Name], "Step 4 (optional): Enter additional information." If you choose to enter this information separately, click on the "PMCDP" menu item at the top of the page, choose "Supporting Information."

A text box is provided in which you will place the information. You may type directly into the text box or "cut and paste" information from other documents. There is a text limit of 4,000 characters. Please be concise.

PMCDP Profile for

Step 4 (optional): Enter additional information

Enter any supporting information concerning your PMCDP certification (4000 character limit). The text will be appended to your "Supervisor/Site Review Report".

Click on "Save Changes" to save your data.

Last updated:

The screenshot displays a web form for entering supporting information. It features a large, empty text box with a blue border and a vertical scrollbar on the right side. Below the text box are two buttons: "Save Changes" and "Clear Form". The "Save Changes" button is highlighted with a black oval.

Click on "Save Changes" whether or not you have entered information.

2. You will be presented with a screen notifying you that all your profile has been updated. You will be offered the opportunity to begin assessing your competencies or to view the Supervisor/Site Review Report. Choose the applicable “click here” link.

PMCDP Profile for

Your profile has been updated.

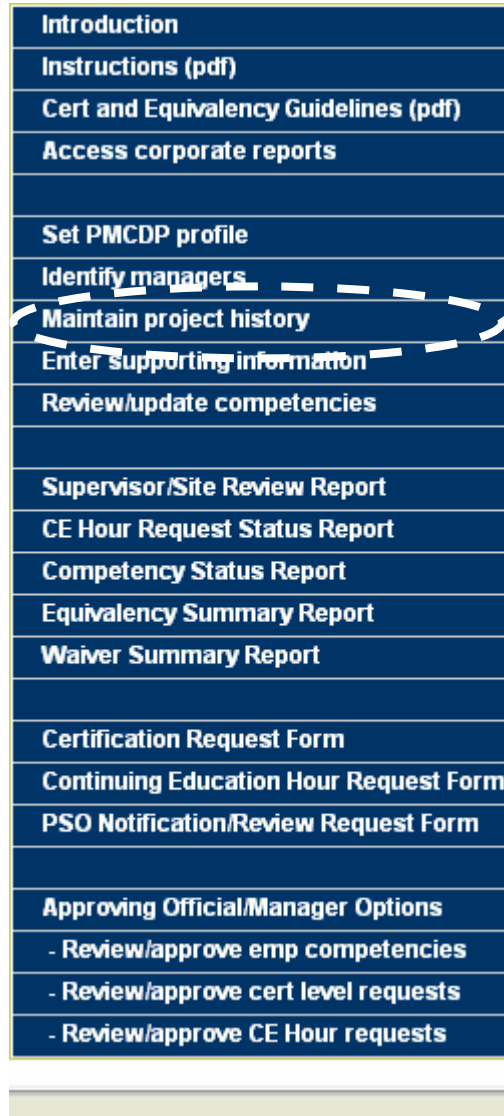
You can go back at any time and add or update your profile information by clicking on the appropriate items in the PMCDP menu.

If you want to start assessing your PMCDP competencies, [click here](#)

If you want to view the report that will be presented to the Certification Review Board (CRB) during your consideration for certification, [click here](#)

Updating Project History

1. To update your project history, click on the “PMCDP Menu” and choose “Maintain project history.”



- A screen with the header “PMCDP Profile for [Your Name]” will appear titled “Step 3: Maintain project history.”

PMCDP Profile for

Step 3: Maintain project history

Sorted by your_date (Click on underlined column headings to change sort order)

The CRE requests that certification candidates please identify the following information for individual projects on which certification candidates are currently working or have worked on over the course of the past 10 years (if certification candidates wish to additionally identify projects worked on prior to 10 years ago, that is at his/her discretion). In addition, please identify future projects on which you anticipate that you will work beginning within a year.

[Add another project](#)

Action	<u>Project Name</u>	Position Title	<u>Total Project Cost (in millions)</u>	<u>Overall Project Start Date</u>	Overall Project End Date	Your Start Date on Project	Your End Date on Project	Project Description
[Delete] [Update]								[View]
[Delete] [Update]								[View]

Options:

Delete: This will delete all information for the selected project as currently showing in the table.

Update: This will bring you back to the original input screen for project information.

View Description: This will bring up a text box that will allow you to see the description previously entered.

Sort: Project history information is presented in date-order, with the most recent position date first. You may sort your project history information by the project name, total project cost, overall project start date, or your start date on a project. To change sort order, click on the underlined column heading.

- To update a project, under the “Action” column, click on “Update.”

[Add another project](#)

Action	<u>Project Name</u>	Position Title	<u>Total Project Cost (in millions)</u>	Overall Project Start Date	Overall Project End Date	Your Start Date on Project	Your End Date on Project	Project Description
[Delete] [Update]								[View]

Save and continue

Clear form

4. A screen detailing the project information will be displayed. Update as necessary. Click on “Save and continue.”

Update a project in your PMCDP profile

* - Required fields

Project name: *

Position title: *

Total project cost: * (in millions; do not use dollar sign)

Overall project start date: *

Overall project end date: * (mm/dd/yyyy format - leave blank if current project)

Your start date on the project: * (mm/dd/yyyy format)

Your end date on the project: * (mm/dd/yyyy format - leave blank if still on project)

Specific role: * (4000 character limit)
Include specific involvement during project life cycle schedule/decision phases (e.g., served as project manager during CD-0 through from 7/95 through 9/97; served as project engineer during project closeout from 1/03 through 9/03; serve as federal project director du CD-4 project closeout from 9/03 to present).

Save and continue

- A screen with the header “PMCDP Profile for [Your Name]” will appear stating that your profile has been updated. All current projects will be listed for your review.

PMCDP Profile for

Step 3: Maintain project history

Sorted by date *(Click on underlined column headings to change sort order)*

The CRB requests that certification candidates please identify the following information for individual projects on which certification candidates are currently working or have worked on over the course of the past 10 years (if certification candidates wish to additionally identify projects worked on prior to 10 years ago, that is at his/her discretion). In addition, please identify future projects on which you anticipate that you will work beginning within a year.

Your project has been added.

[Add another project](#)

Action	<u>Project Name</u>	Position Title	<u>Total Project Cost (in millions)</u>	Overall Project Start Date	Overall Project End Date	Your Start Date on Project	Your End Date on Project	Project Description
[Delete] [Update]								[View]
[Delete] [Update]								[View]
[Delete] [Update]								[View]

Save and continue

Click on “Save and continue.”

- You can go back at any time and add or update your project history information by clicking on “Maintain project history” in the PMCDP menu.

7. A screen with the header “PMCDP Profile for [Your Name]” will appear stating that your project information has been updated. Two options are presented for you:
- Start entering PMCDP competency information, and
 - Review of your current information

[Text-only menu](#)

PMCDP Profile for

Your profile has been updated.

You can go back at any time and add or update your profile information by clicking on the appropriate items in the PMCDP menu.

If you want to start assessing your PMCDP competencies, [click here](#)

If you want to view the report that will be presented to the Certification Review Board (CRB) during your consideration for certification, [click here](#)

Choose the applicable “click here” to continue.

Initial Entry of Competency Information

Once you have entered all your background information and project history, chosen your approving officials, and entered any supplemental information, you may begin entering your competency information.

1. You may enter competency information several ways:
 - From the PMCDP Menu,
 - From the initial Profile Update Notification screen presented when you completed Step 4, or
 - After you updated your project history.

PMCDP Menu: Click on “PMCDP” and choose “Review/Update Competencies.”

Profile Update Notification Screen: After you have finished entering all your initial information, choose “If you wish to start assessing your PMCDP competencies, click here.”

Updated Project History: After you have finished entering all your initial information, choose “If you wish to start assessing your PMCDP competencies, click here.”

Initial Entry of Competency Information

- A screen with the header “PMCDP COMPETENCY SUMMARY FOR [Your Name]” will appear.

PMCDP COMPETENCY SUMMARY FOR

[View your competency status report](#)

	Competency ID (click for description)	Competency Status					Justification or Comments
		Developmental Need			Equivalency/ Requirements Met	Waiver	
		Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item	1.1.1						View comments
Update this item	1.1.2						View comments
Update this item	1.1.3						View comments
Update this item	1.2.1						View comments
Update this item	1.3.1						View comments
Update this item	1.4.1						
Update this item	1.6.1						
Update this item	1.6.2						

The competency summary page is divided into the following areas/columns:

Update this Item: Click on this link to enter or update information.

Competency ID number: All PMCDP competencies (including training electives), developmental activities, and behavioral skills are listed in numerical order.

The identification number is the same as the identification number in the PMCDP Certification and Equivalency Guide and the Supervisory Review/Participant Profile. You may review the competency statement by clicking on the underlined numerical ID.

Competency Status: Lists your choice of whether the competency is a developmental need; if you have equivalent training, education, and/or experience; or if you are requesting a waiver for this competency. See steps 3 through 28 below.

Justification or Comments: Lists clarifying or additional information that will assist your approval official and the Certification Review Board in evaluating your competency in this area. See steps 8, 14, and 24 below.

(Continued on next page)

Initial Entry of Competency Information

The following options are presented (bold underlined text):

Update this item: This will bring you back to the original input screen.

View Comments: This will bring up a text box that will allow you to see the comments or justification you have entered.

View your competency status report: This will take you to the Competency Status Report screen.

Competency Status

You must enter information for “Competency Status” for each required competency.

- All competency fields will be blank. Begin by choosing the competency you wish to address. You may view the competency statement by clicking on the Competency ID number. A text box will appear with the applicable competency statement.

	Competency ID (click for description)	Competency Status					Justification or Comments
		Developmental Need			Equivalency/ Requirements Met	Waiver	
		Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item	1.1.1						View comments
Update this item	1.1.2						View comments

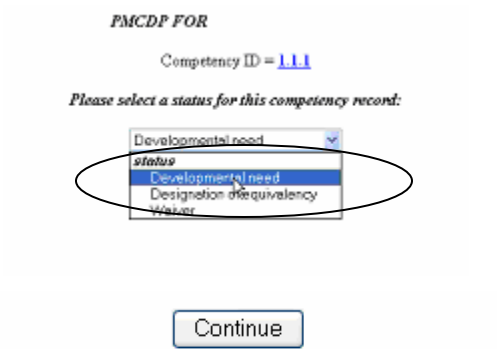
Competencies require demonstrated ability at one of three levels. Demonstrated ability is defined as the actual performance of a task or activity in accordance with policy, procedures, guidelines, and/or accepted industry or Departmental practices.

- Familiarity-Level:** Basic knowledge of, or exposure to, the subject or process adequate to discuss the subject or process with individuals of greater knowledge.
- Working-Level:** Knowledge required to monitor and assess operations/ activities, to apply standards of acceptable performance, and to reference appropriate materials and/or expert advice as required to ensure the safety of project activities.
- Expert-Level:** Comprehensive, intensive knowledge of the subject or process sufficient to provide advice in the absence of procedural guidance.

Click on “Update this item.”

Initial Entry of Competency Information

- A screen with the header “PMCDP for [Your Name]” will appear displaying competency number and a drop down box.



Select a status by clicking the down arrow in the box. Three choices will be displayed. Select one from the list.

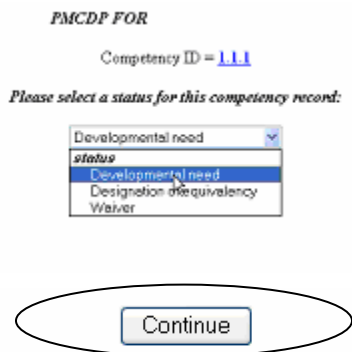
Options:

“Developmental need” is a competency that is required for certification or job description and the participant does not currently possess all (an acceptable level) of the knowledge and/or skills required for a competency. (See steps 6–12 below to choose a developmental need)

“Designation of equivalency” allows you to identify prior training, and or experience that gives you the required knowledge, skill, and/or ability for this competency. (See steps 13–22 below to designate an equivalency)

“Waiver” (See steps 23–28 below to request a waiver)

- Click on “Continue.”



Initial Entry of Competency Information

Competency Status: Developmental Need

Developmental needs should be discussed with your supervisor and managed through your IDP.

- Once you have chosen “Developmental Need” and clicked “Continue,” a screen will be presented displaying the Header “PMCDP FOR [Your Name]” and the competency number that you are updating, and the “Competency designation selection = Developmental Need.”

PMCDP FOR

Updating competency = [1.12.1](#)

Competency designation selection = **Developmental Need**

*-Required fields

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
-- Select a developmental need -- -- Select a developmental need -- Certification/License College Course Equivalent Training Course Mentoring On-the-job Training Oral Board Review Other PMCDP Course Rotational Assignment Self Study Written Examination	<input type="text"/>	<input type="text"/>	

You are now required to enter information on the type of developmental need you have chosen, the targeted/actual completion dates, and justification or comments that may assist your approval official.

Developmental need is the description of the activity from the given listing that best describes your intended course of action to meet the competency.

Targeted Completion Date is the date (mm/yyyy) that you anticipate completing this competency.

Actual Completion Date is the date (mm/dd/yyyy) at which you completed the training and/or experiential activity for this competency.

Justification or Comments is the information that validates why you require this activity.

(Continued on next page)

Initial Entry of Competency Information

Click the down arrow in “Developmental need” column to view the list of choices. Choose one of the following:

- Certification/License
- On-the-job Training
- Rotational Assignment
- College Course
- Oral Board Review
- Self Study
- Equivalent Training Course
- Other
- Written Examination
- Mentoring
- PMCDP Course

PMCDP FOR

Updating competency = [1.12.1](#)

Competency designation selection = **Developmental Need**

*-Required fields

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
<div style="border: 1px solid black; padding: 5px;"> Select a developmental need - <ul style="list-style-type: none"> <li style="background-color: #e0e0e0;">- Select a developmental need - Certification/License College Course Equivalent Training Course Mentoring On-the-job Training Oral Board Review Other PMCDP Course Rotational Assignment Self Study Written Examination </div>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	
<input type="button" value="SUBMIT"/>			

Initial Entry of Competency Information

7. Enter the “Targeted Completion Date” (mm/yyyy).

You will update this information with the actual completion date once you have completed the developmental need.

PMCDP FOR

Updating competency = [1.12.1](#)

Competency designation selection = **Developmental Need**

*-Required fields

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
-- Select a developmental need -- -- Select a developmental need --	<input type="text"/>	<input type="text"/>	

8. You may choose to enter justification or comments to assist your approval official. Enter applicable information in column titled “Justification or Comments.”

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
-- Select a developmental need -- -- Select a developmental need --	<input type="text"/>	<input type="text"/>	

Click on “SUBMIT.”

Initial Entry of Competency Information

9. You will be brought to a screen summarizing the information you have entered.

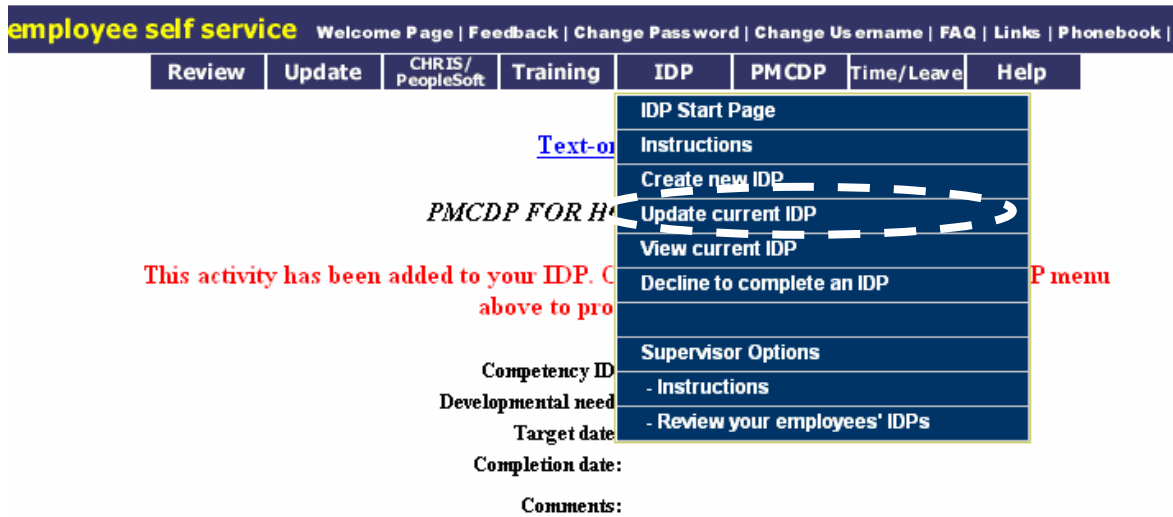


Options:

Update another competency: Click on “Update another competency” to continue adding information to your competencies.

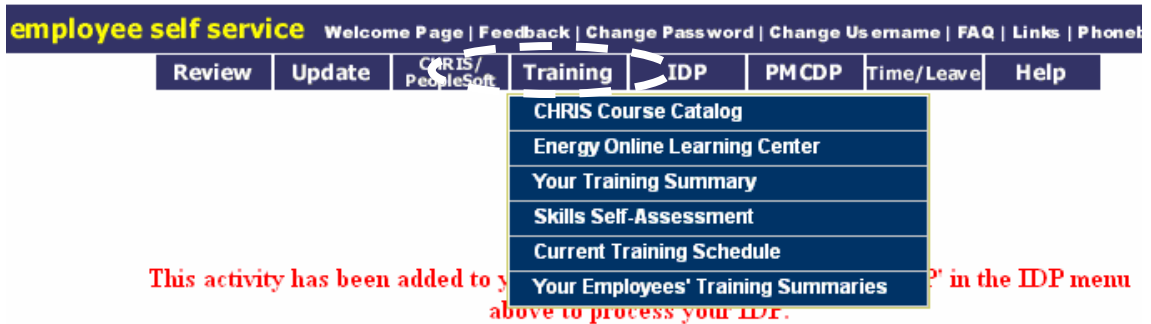
Re-edit this competency: This will take you back to the previous screen where you can edit the information.

10. This activity is automatically added to your Individual Development Plan (IDP). Click on “IDP” on the ESS menu; choose “Update current IDP” to process your IDP.



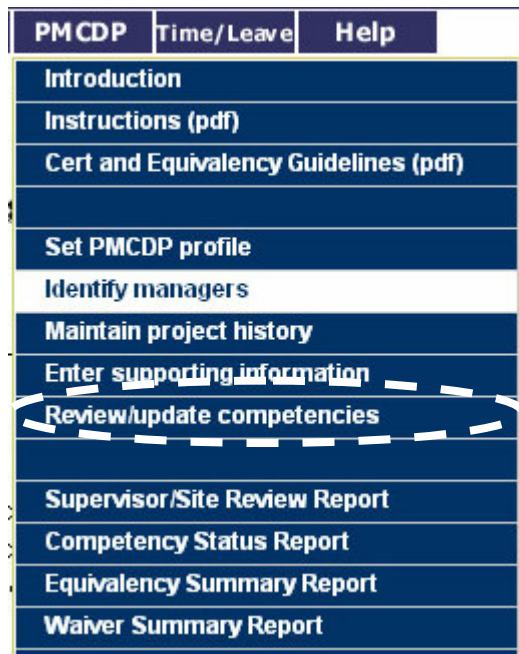
Initial Entry of Competency Information

- If you also want to register for a PMCDP class, or look up training, you can access the training module by clicking on the “Training” tab on top of the page. ESS goes directly into CHRIS “Workflow” so you can register without leaving the ESS site.



Competency ID:
 Developmental need:
 Target date:
 Completion date:
 Comments:

- To request a developmental need for another competency, click on “PMCDP Menu,” “Review/Update Competencies” and follow steps 1–9.



Competency Status: Equivalency/Requirements Met

If you have prior training, education or experience that satisfies the knowledge, skills, and abilities for a competency, you may request an “Equivalency.”

13. Repeat steps 1 through 4. Choose “Equivalency.”

A screen with the header “PMCDP for [Your Name]” will appear displaying competency number that you are updating, and the “Competency designation selection = Equivalency.”

[Text-only menu](#)

PMCDP FOR

Updating competency = [1.6.2](#)
Competency designation selection = Equivalency

*-Required fields

Competency Status*	Justification or Comments (2000 character limit)*	Verification Method*
<i>Equivalency type</i>		
<div style="border: 1px solid black; padding: 2px;"> -- Select an equivalency -- -- Select an equivalency -- Education & Experience Experience Oral Exam Other PE or RA License PMCDP Training PMI PMP TQP Certification Training or Education completed Written Exam </div>		<div style="border: 1px solid black; padding: 2px;"> -- Select a verification method -- </div>
<input type="button" value="SUBMIT"/>		

- In the column “Competency Status,” “Equivalency type” click the down arrow in the drop down box to display a list of options. Choose one.
 - Professional Engineer (PE) or Registered Architect (RA) license
 - PMI Project Management Professional (PMP)
 - PMCDP training
 - Oral exam
 - Education and Experience
 - TQP Certification
 - Experience
 - Written Exam
 - Training or Education Completed
 - Other

Initial Entry of Competency Information

- 14. Information that supports your request for having equivalent knowledge, skills, and abilities for this competency is required to be entered in the “Justification or Comments” field (2,000 character limit).

Provide the details for experiential and training information, the number of your Project Management Institute Project Management Professional certification, Professional Engineer and/or Registered Architect license, and date/state of issuance of each.

PMCDP FOR

Updating competency = [1.12.1](#)
Competency designation selection = **E**quivalency

*-Required fields

Competency Status *	Justification or Comments *	Verification Method *
<i>Equivalency type</i>	(2000 character limit)	
<input type="text" value="- Select an equivalency -"/>	<input type="text"/>	<input type="text" value="- Select a verification method -"/>

Initial Entry of Competency Information

15. Equivalencies should be verifiable. Click the down arrow to the right of “Select a verification method” field to view a list of choices. Select the appropriate method for verification of the knowledge, skills, and abilities associated with the competency. Choose one.

- Written Exam
- Qualifying Official
- Observed
- Course Completion Certificate
- Interview
- Oral Board
- SME (Subject Matter Expert)
- On-the-Job-Training
- Transcript
- Professional Certificate/License
- Position Description
- No Documentation

Click on “SUBMIT.”

PMCDP FOR

Updating competency = [1.6.2](#)
Competency designation selection = **Equivalency**

*-Required fields

Competency Status *	Justification or Comments (2000 character limit) *	Verification Method *
<i>Equivalency type</i>		
PMCDP Training	EM Systems and Practices in DOE. Completed 07/2004	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: center;">-- Select a verification method --</div> <div style="text-align: center;">-- Select a verification method --</div> <div style="text-align: center;">Course Completion Certificate</div> <div style="text-align: center;">Course Evaluation</div> <div style="text-align: center;">Interview</div> <div style="text-align: center;">No Documentation</div> <div style="text-align: center;">Observed</div> <div style="text-align: center;">On the Job Training</div> <div style="text-align: center;">Oral Board</div> <div style="text-align: center;">Position Description</div> <div style="text-align: center;">Professional Certificate/License</div> <div style="text-align: center;">Qualifying Official</div> <div style="text-align: center;">SME</div> <div style="text-align: center;">Transcript</div> <div style="text-align: center;">Written Exam</div> </div>

Initial Entry of Competency Information

16. A screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear detailing your choices. You may accept these inputs and submit this equivalency for approval, edit the information, or update another competency. Choose one option.

PMCDP FOR

Competency ID: 1.1.1
Equivalency type: Education & Experience
Verified by: Course Completion Certificate
Comments: vvvvvvvvvv

[\[Update another competency\]](#) | [\[Submit for approval\]](#)
[\[Re-edit this competency\]](#)

Options:

Submit for approval: This will generate an electronic message to the approving official you select requesting approval for this competency.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the “Review/Update Competency” screen where you can select another competency to update.

Initial Entry of Competency Information

- 17. If you choose “Submit for approval,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. No name will appear as the approving official.

PMCDP FOR.

Competency ID = [1.1.2](#)

Please select an approving official for this competency record. By default, your first line manager from your profile will be selected. Click on the “Change” link to modify the approving official for this competency.

Approving Official:*

[Change](#)

Continue

Click “Change” to select the appropriate DOE employee.

Choice of approving official must be in accordance with your program office policy and procedure.

- 18. A screen will be displayed that allows you to search for the name of your applicable approving official.

PMCDP approving official search

Search by name (last,first):

NOTE: No space between comma and first name

Manager name:

Submit

Cancel

Type in the name: Last,First (no space between comma and first name).

Click “Submit.”

Initial Entry of Competency Information

19. A screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. The name you have selected will be displayed.

PMCDP FOR.

Competency ID = [1.1.2](#)

Please select an approving official for this competency record. By default, your first line manager from your profile will be selected. Click on the "Change" link to modify the approving official for this competency.

Approving Official:*

Name of Approving Official here

[Change](#)

Continue

Click on “Continue.”

20. A screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. The name you have selected and the email address of this person will be displayed.

PMCDP FOR

Competency ID = [1.6.1](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:	Name of Approving Official here
Email address:	Email address of Approving Official here

You may send or cancel the competency review request. Click on one.

Options:

Send for approval: This will automatically send an email message to the approving official informing him or her that this competency is ready for review.

Cancel request: You will be returned to the “Review/Update Competency” screen.

Initial Entry of Competency Information

21. If you send for approval, a screen titled “PMCDP COMPETENCY SUMMARY FOR [Your Name]” will be presented. It will state “Email has been sent to the designated approving official.”

PMCDP COMPETENCY SUMMARY

Email has been sent to the designated approving official. [View your competency status report](#)

	Competency ID (click for description)	Competency Status				Justification or Comments	
		Developmental Need			Equivalency/ Requirements Met		Waiver
		Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item	1.1.1					View comments	

You may review your competency information and update if necessary. Click “View your competency status report.”

22. To update another competency, scroll down the page, choose the competency, and click on “Update this item.”

PMCDP COMPETENCY SUMMARY

Email has been sent to the designated approving official. [View your competency status report](#)

	Competency ID (click for description)	Competency Status				Justification or Comments	
		Developmental Need			Equivalency/ Requirements Met		Waiver
		Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item	1.1.1					View comments	

Initial Entry of Competency Information

Competency Status: Waiver

A participant may request a waiver for an individual competency or a whole certification level. Waiver of whole certification level requires that all competencies be completed with request for a waiver.

The waiver request will be sent to the supervisor/manager and the site/office manager for approval. It is expected that waiver authority will be used only in rare and unusual circumstances.

23. Repeat steps 1 through 4. Choose “Waiver.”

24. A screen displaying your name and the competency number that you are updating, and the “Competency designation selection = Waiver” will be presented.

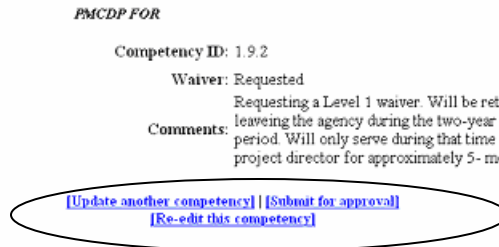
In the column “Justification or Comments,” enter applicable information. This text box has a 2,000 character limit.

The screenshot displays the PMCDP (Project Management Career Development Program) interface. At the top, it says "PMCDP". Below that, it indicates "Updating competency = 1.1.3" and "Competency designation selection = Waiver". A prompt asks the user to "Enter justification in the box below for waiver designation." There is a red asterisk and the text "*Required Field" above a large text input area labeled "Justification or Comments (2000 character limit)". A mouse cursor is positioned over the top of this text box. Below the text box is a "SUBMIT" button, which is circled in red.

Click on “SUBMIT.”

Initial Entry of Competency Information

- 25. A summary screen titled “PMCDP FOR [Your Name]” and the competency you are addressing will be presented detailing that you are requesting a waiver, and the justification/comments that have been entered. You can accept these inputs and submit this equivalency for approval, edit the information, or update another competency. Choose one option.



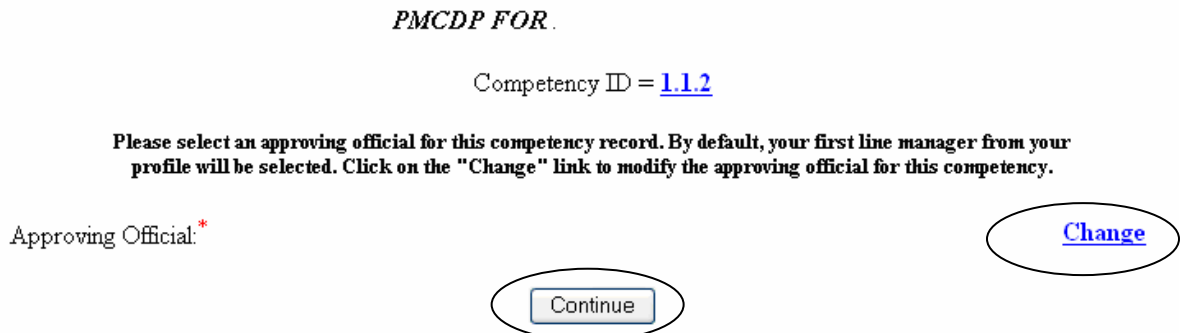
Options:

Submit for approval: This will generate an electronic message to the manager you select requesting approval for this competency waiver.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the competency summary page where you can select another competency to update.

- 26. If you choose “Submit for approval,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear.



If no name appears next to “Approving Official” or the name is incorrect, click “Change” to select the appropriate DOE employee.

.....

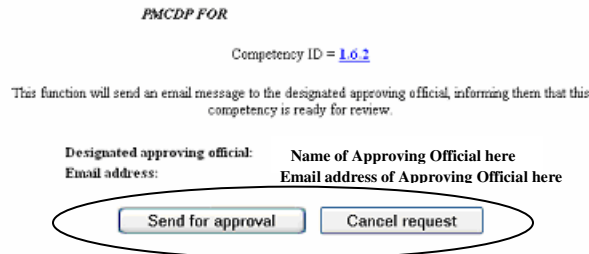
Choice of approving official must be in accordance with your program office policy and procedure.

.....

If the name of the Approving Official is correct, click on “Continue.”

Initial Entry of Competency Information

27. A screen with the header “PMCDP for [Your Name]” and the number of the competency will appear. The name you have selected and the email address of this person will be displayed. You can accept these inputs and submit this equivalency for approval, or cancel the request.

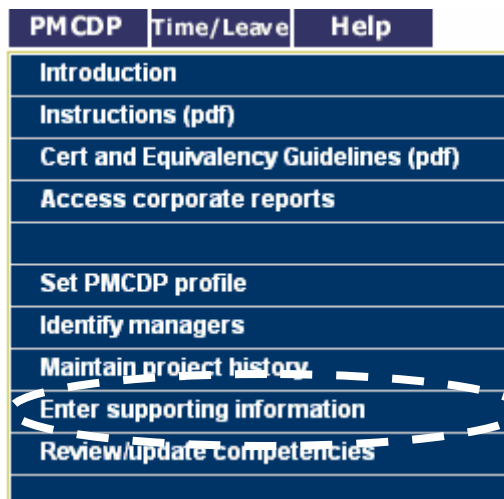


Options:

Send for approval: This will automatically send an email message to the approving official informing him or her that this competency is ready for review.

Cancel request: You will be returned to the “Review/Update Competency” screen.

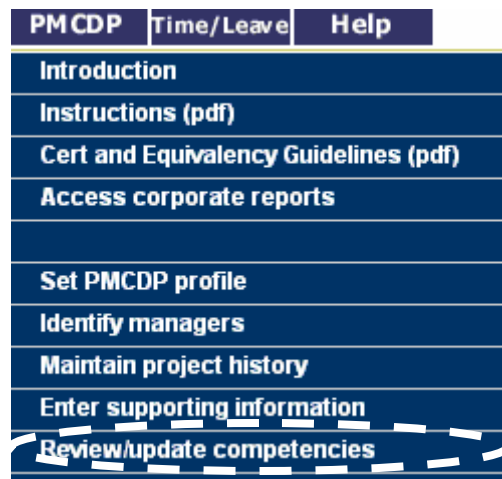
28. If you need additional space to document your request for a waiver, you may choose to enter more information under the “Enter Supporting Information” (click on PMCDP Menu, “Enter Supporting Information”) once you have submitted the waiver request.



Review/Update Competencies

Once you have completed a developmental assignment or training, or you have additional information to input for a competency, you may update it at any time. You may view comments from approving officials on competencies in the “Competency Status Report.” See tutorial section on “Reports.”

1. Click on the PMCDP menu and choose “Review/Update Competencies.”



-
2. To update a developmental need, follow steps 3–14 below.
To update an equivalency, follow steps 15–24 below.
To update a waiver, follow steps 25–31 below.
-

Changing and / or Submitting a Developmental Need Competency

When the developmental activity or its targeted or actual completion dates has changed, or when you have completed a developmental activity, you must update this information.

3. Click on PMCDP Menu, choose “Review/Update Competency.” You will be taken to the Competency Status screen. Choose a competency and click on “Update this item” for the applicable competency.

Competency ID (click for description)	Competency Status					
	Developmental Need			Equivalency/ Requirements Met	Waiver	Justification or Comments
	Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item 1.1.1	College Course					
Update this item 1.1.2				PMCDP Training		View comments
Update this item 1.1.3				Education & Experience		View comments
Update this item						

4. After selecting “Update This Item,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. The current status will be highlighted.

PMCDP FOR

Competency ID = [1.1.1](#)

Please select a status for this competency record:

Developmental need ▼

- Developmental need
- Designation of equivalency
- Waiver

Continue

To choose developmental need, click the down arrow in the drop down box and choose “Developmental Need.”

Click on “Continue.”

5. A screen will appear with the header “PMCDP FOR [Your Name]” and the number of the competency, and “Competency designation selection = Developmental Need.”

To choose a different activity for “Developmental Need,” click the down arrow to the right of “Select a developmental need” drop down box and select a new/different option.

[Text-only menu](#)

PMCDP FOR

Updating competency = [1.4.1](#)
Competency designation selection = Developmental Need

*-Required fields

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
-- Select a developmental need -- -- Select a developmental need -- Certification/License College Course Equivalent Training Course Mentoring On-the-job Training Oral Board Review Other PMCDP Course Rotational Assignment Self Study Written Examination			

6. Targeted Completion Date:

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
-- Select a developmental need --			

To update, click on the “Targeted Completion Date” field and enter the new date (mm/yyyy).

- Actual Completion Date: To enter or update the actual completion date of your activity, click on the “Actual Completion Date” field and enter the date (mm/dd/yyyy).

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
- Select a developmental need - <input type="text"/>	<input type="text"/>	<input type="text"/>	

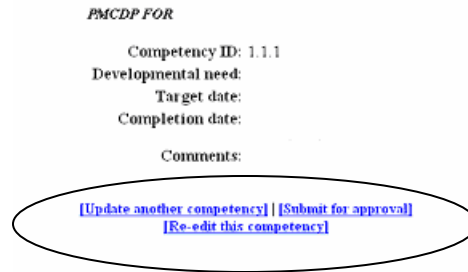
- Justification and comments: To update your justification or comments, highlight and delete the text you want to change. Insert comments or cut and paste additional information into the comment box.

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
- Select a developmental need - <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Click on “SUBMIT.”

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
- Select a developmental need - - Select a developmental need - <input type="text"/>	<input type="text"/>	<input type="text"/>	

- 10. A summary page with the header “PMCDP FOR [Your Name]” and the number of the competency, the chosen developmental need, the target date, completion date, and any comments will appear. You can accept these inputs and submit this developmental need for approval, edit the information, or update another competency. Choose one option.



Options:

Submit for approval: This will generate an electronic message to the approving official you select requesting approval for this competency.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the “Review/Update Competency” screen where you can select another competency to update.

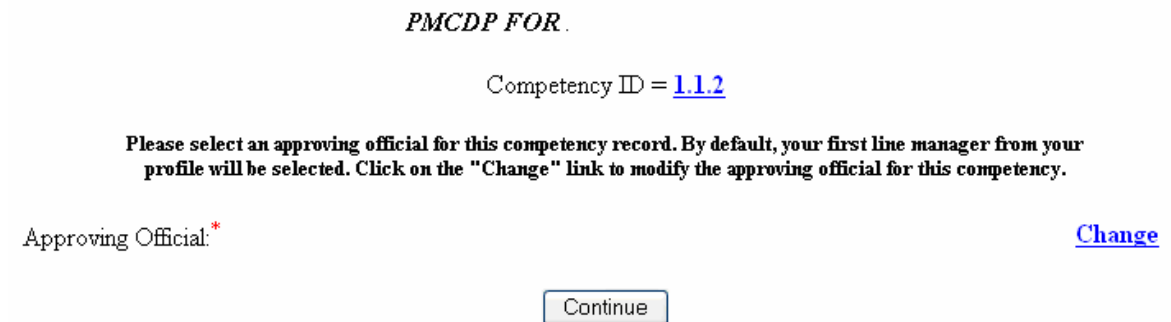
.....

You should also update your IDP to match these changes.

IDP Update: Click on “IDP” on the top menu, choose “Update current IDP” to process your IDP. For details, see “Initial Entry of Competency Information, Developmental Need.”

.....

- 11. If you choose “Submit for approval,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. If you have previously chosen an approving official, that name will appear on the screen.



.....

Choice of an approving official must be in accordance with your program office policy and procedure.

.....

12. If no name appears as the approving official or the name is incorrect, click “Change.”
If the name is correct, click “Continue.”

PMCDP FOR.

Competency ID = [1.1.2](#)

Please select an approving official for this competency record. By default, your first line manager from your profile will be selected. Click on the "Change" link to modify the approving official for this competency.

Approving Official:*

[Change](#)

Continue

-
13. If you choose “Change,” a screen will be displayed that allows you to search for the name of your applicable approving official.

PMCDP approving official search

Search by name (last,first):

NOTE: No space between comma and first name

Manager name*

Submit

Cancel

Type in the name: Last,First (no space between comma and first name).

Click “Submit.”

14. If you choose “Continue” or have now chosen an approving official, a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. This is notifying you that an automatic email will be sent to the name/email address you have selected. You may send or cancel the request.

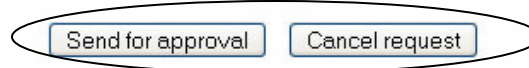
PMCDP FOR

Competency ID = [1.1.1](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official: Name of Approving Official here

Email address: Email address of Approving Official here



Send for approval: This will automatically send an email message to the approving official informing him or her that this competency is ready for review.

Cancel request: You will be returned to the “Review/Update Competency” screen.

Changing and/or Submitting an Equivalency

You may update your equivalency type, the justification/comments, and/or the verification method.

- Click on PMCDP Menu, choose “Review/Update Competency.” You will be taken to the Competency Status screen. Choose a competency and click on “Update this item” for the applicable competency.

Competency ID (click for description)	Competency Status					Justification or Comments
	Developmental Need			Equivalency/ Requirements Met	Waiver	
	Activity Type	Targeted Completion Date	Actual Completion Date			
Update this item 1.1.1	College Course					
Update this item 1.1.2				PMCDP Training		View comments
Update this item 1.1.3				Education & Experience		View comments

- After selecting “Update This Item,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. The current competency record status will be highlighted.

PMCDP FOR

Competency ID = 1.1.1

Please select a status for this competency record:

Developmental need ▼

status

Developmental need

Designation of equivalency

Waiver

Continue

To choose equivalency, click the down arrow to the right in the drop down box and choose “Designation of Equivalency.”

Click on “Continue.”

17. A screen with the header “PMCDP FOR [Your Name],” the number of the competency, and the “Competency designation selection = Equivalency” will be presented.

In the column “Competency Status,” “Equivalency type” click the down arrow to the right of “Select an equivalency” to display a list of options. Choose one.

PMCDP FOR

Updating competency = [1.6.1](#)
Competency designation selection = Equivalency

*-Required fields

Competency Status*	Justification or Comments (2000 character limit)*	Verification Method*
<i>Equivalency type</i> -- Select an equivalency -- -- Select an equivalency -- Education & Experience Experience Oral Exam Other PE or PA License PMCDP Training PMI PMP TQP Certification Training or Education completed Written Exam		-- Select a verification method -- -- Select a verification method --

18. Update information that supports your request for having equivalent knowledge, skills, and abilities for this competency in the “Justification or Comments” field (2,000 character limit). This information should be concise and thorough, as it will be the basis for Certification Review Board decision on this competency.

Competency Status*	Justification or Comments (2000 character limit)*	Verification Method*
<i>Equivalency type</i> PMCDP Training	PM Systems and Practices in DOS. Completed 07/2004	Select a verification method -- -- Select a verification method --

19. Update the verification method, if applicable. Click the down arrow to the right of “Select a verification method” field to view a list of choices. Select a different method.

PMCDP FOR

Updating competency = [1.6.2](#)
Competency designation selection = Equivalency

* -Required fields

Competency Status*	Justification or Comments (2000 character limit)*	Verification Method*
<i>Equivalency type</i>		
PMCDP Training	FM Systems and Practices in DOE. Completed 07/2004	<div style="border: 1px solid black; padding: 5px;"> -- Select a verification method -- -- Select a verification method -- Course Completion Certificate Course Evaluation Interview No Documentation Observed On the Job Training Oral Board Position Description Professional Certificate/License Qualifying Official SME Transcript Written Exam </div>

Click on “SUBMIT.”

20. A summary screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. You can accept these inputs and submit this updated equivalency for approval, edit the information, or update another competency. Click on one option.

PMCDP FOR

Competency ID: 1.1.2
Equivalency type: Education & Experience
Verified by: On the Job Training
Comments: 20 yrs exp in field

[\[Update another competency\]](#) | [\[Submit for approval\]](#)
[\[Re-edit this competency\]](#)

Options:

Submit for approval: This will generate an electronic message to the approving official you select requesting approval for this competency.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the “Review/Update Competency” screen where you can select another competency to update.

- 21. If you choose “Submit for approval,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear.

PMCDP FOR.

Competency ID = [1.1.2](#)

Please select an approving official for this competency record. By default, your first line manager from your profile will be selected. Click on the "Change" link to modify the approving official for this competency.

Approving Official:*

[Change](#)

Continue

Choice of an approving official must be in accordance with your program office policy and procedure.

- 22. If no name appears as the approving official or the name is incorrect, click “Change.”
If the name is correct, click “Continue.”

PMCDP FOR.

Competency ID = [1.1.2](#)

Please select an approving official for this competency record. By default, your first line manager from your profile will be selected. Click on the "Change" link to modify the approving official for this competency.

Approving Official:*

[Change](#)

Continue

23. If you choose “Change,” a screen will be displayed that allows you to search for the name of your applicable approving official.

PMCDP approving official search

Search by name (last,first):

NOTE: No space between comma and first name

Manager name:

Type in the name: Last,First (no space between comma and first name).
Click “Submit.”

24. If you choose “Continue” or have now chosen an approving official, a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. This is notifying you that an automatic email will be sent to the name/email address you have selected. You may send or cancel the request. Click on one.

PMCDP FOR

Competency ID = [1.6.2](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:	Name of Approving Official here
Email address:	Email address of Approving Official here

Send for approval: This will automatically send an email message to the approving official informing him or her that this competency is ready for review.

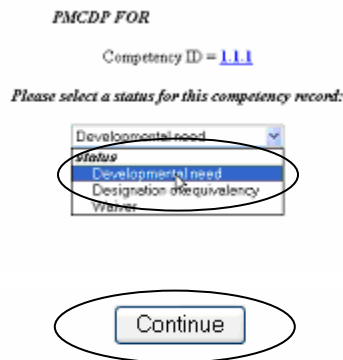
Cancel request: You will be returned to the “Review/Update Competency” screen.

Changing and/or Submitting a Waiver

You may update your justification/comments. These comments should be concise and thorough, as they will be the basis for Certification Review Board approval of this waiver.

25. Click on PMCDP Menu, choose “Review/Update Competency.” Click on “Update this item” for the applicable competency.

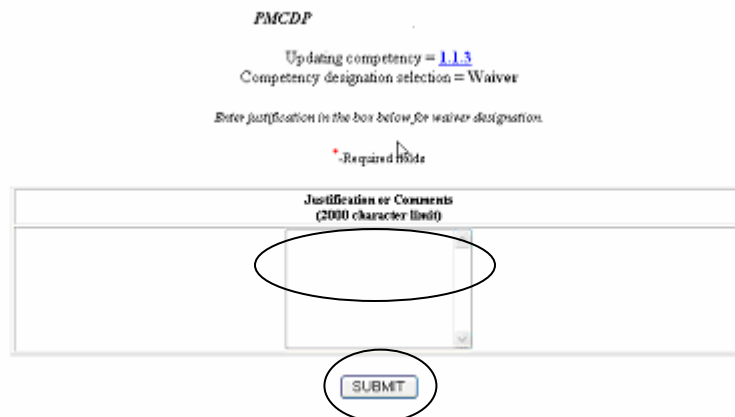
After selecting “Update This Item,” a screen will appear displaying your name and the competency number. The current status will be highlighted.



To choose waiver, click the down arrow to the right of the “Select a Status” and choose “Waiver.”

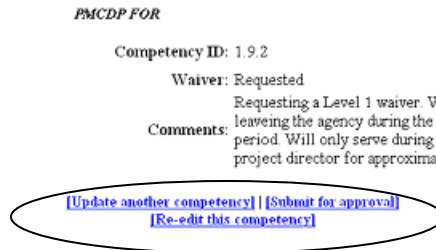
Click “Continue.”

26. A screen with the header “PMCDP FOR [Your Name]” and the number of competency will appear. Update the justification in the box provided (2,000 character limit).



Click on “Submit.”

27. A screen with the header “PMCDP FOR [Your Name]” and the number of competency will appear detailing your choices. You can accept these inputs and submit this waiver for approval, edit the information, or update another competency. Click on one option.



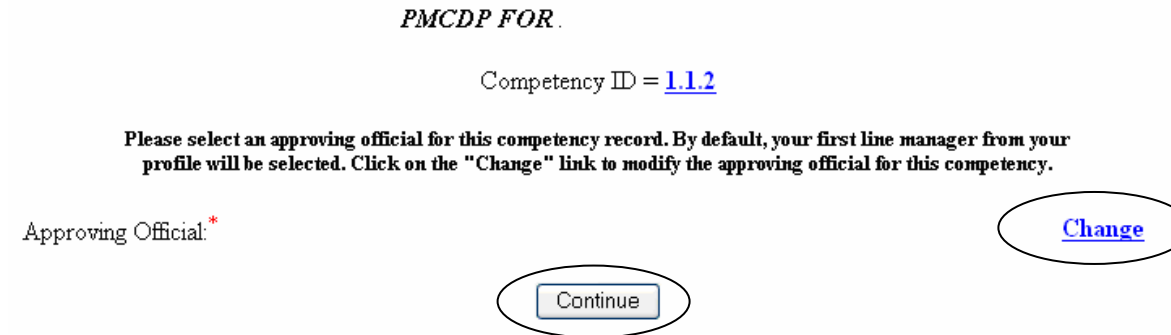
Options:

Submit for approval: This will generate an electronic message to the approving official you select requesting approval for this competency.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the “Review/Update Competency” screen where you can select another competency to update.

28. If you choose “Submit for approval,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear.



If no name appears as the approving official or the name is incorrect, click “Change.”

If the name is correct, click “Continue.”

.....
 Choice of an approving official must be in accordance with your program office policy and procedure.

29. If you choose “Change,” a screen will be displayed that allows you to search for the name of your applicable approving official.

PMCDP approving official search

Search by name (last,first):

NOTE: No space between comma and first name

Manager name:

Type in the name: Last,First (no space between comma and first name).
Click “Submit.”

30. If you choose “Continue” or have already chosen an approving official, a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. This is notifying you that an automatic email will be sent to the name/email address you have selected. You may send or cancel the request. Click on one.

PMCDP FOR

Competency ID = [1.6.2](#)

This function will send an email message to the designated approving official, informing them that this competency is ready for review.

Designated approving official:	Name of Approving Official here
Email address:	Email address of Approving Official here

Send for approval: This will automatically send an email message to the approving official informing him or her that this competency is ready for review.

Cancel request: You will be returned to the “Review/Update Competency” screen.

31. A screen summarizing the competency actions will appear. You may view justification comments or update competencies.

PMCDF COMPETENCY SUMMARY FOR

Email has been sent to the designated approving official.

	Competency ID (click for description)	Competency Status				Justification or Comments
		Developmental Need		Equivalency/ Requirements Met	Waiver	
		Activity Type	Targeted Completion Date			
Update this item	1.1.1					View comments
Update this item	1.1.2					View comments
Update this item	1.1.3					View comments
Update this item	1.2.1					View comments
Update this item	1.3.1					View comments
Update this item	...					

Rotation with Industry

The Office of Management has established agreements with public organizations and private enterprises to assign DOE federal project directors to rotational professional and managerial positions for greater scope and depth of work experience and better understanding of business culture, changes in business practices, and skills required to implement change. Such real-world experience encourages him or her to institute innovative changes and sound business practices once back at DOE.

1. The PMCDP participant must request a rotation through a supervisor/first line manager according to his or her program office policy.
-

2. *Rotation with Industry* assignments are available to project managers certified at Level 1 or higher as career-broadening experiences. Whether for certification or for CE credit, a *Rotation with Industry* assignment must be included as an IDP activity.
-

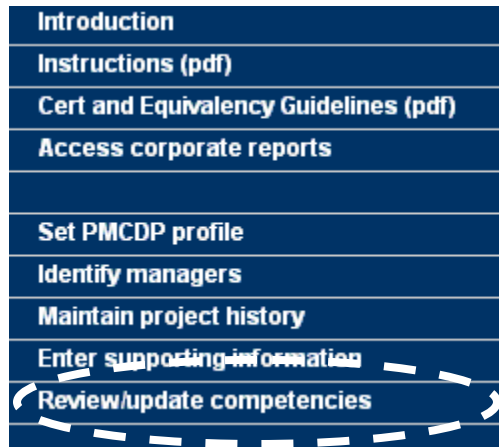
3. The PSO, Field Element Manger, Office Manager or other program official must nominate candidates for *Rotation with Industry* assignments. The Certification Review Board then approves certified federal project directors for rotational assignments according to his or her developmental needs and qualifications.

To be eligible for the *Rotation with Industry* program under the PMCDP, a candidate must

- Be a full-time DOE employee,
 - Possess at least a Level 1 certification, and
 - Maintain a satisfactory record of performance confirmed by reference checks.
-

4. To request a rotational assignment, you must enter it as a “Developmental Need,” enter pertinent financial and logistical data, select your approving officials, and fill out a rotational assignment request form.
-

5. Click on the PMCDP Menu, select “Review/Update Competencies.”



6. Choose a competency to update and click on “Update This Item” or to review a description of the competency, click on the competency number.

	Competency ID (click for description)	Competency Status					Justification or Comments
		Activity Type	Developmental Need		Equivalency/ Requirements Met	Waiver	
			Targeted Completion Date	Actual Completion Date			
Update this item	1.1.1	College Course					
Update this item	1.1.2				PMCDP Training		View comments
Update this item	1.1.3				Education & Experience		View comments
Update this item							

- A screen with the header “PMCDP FOR [Your Name]” and the number of the competency and the “Competency designation selection = Developmental Need” will appear. Click the down arrow in the drop down box in the “Developmental need” column to view the list of choices. Choose “Rotational Assignment.”

PMCDP FOR

Updating competency = [1.12.1](#)

Competency designation selection = **Developmental Need**

*-Required fields

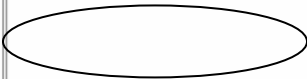
Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
- Select a developmental need - - Select a developmental need - Certification/License College Course Equivalent Training Course Mentoring On-the-job Training Oral Board Review Other PMCDP Course Rotational Assignment Self Study Written Examination	<input type="text"/>	<input type="text"/>	
<input type="button" value="SUBMIT"/>			

- Enter the “Targeted Completion Date” (mm/yyyy).

You will update this information with the actual completion date once you have completed the developmental need.

Competency Status *			Justification or Comments (2000 character limit)
<i>Developmental need</i>	<i>Target Completion Date</i> (mm/yyyy)	<i>Actual Completion Date</i> (mm/dd/yyyy)	
- Select a developmental need - - Select a developmental need -	<input type="text"/>	<input type="text"/>	
<input type="button" value="SUBMIT"/>			

9. You may choose to enter justification or comments to assist your approval official. Enter applicable information in column titled “Justification or Comments.”

Competency Status *			Justification or Comments (2000 character limit)
Developmental need	Target Completion Date (mm/yyyy)	Actual Completion Date (mm/dd/yyyy)	
<div style="border: 1px solid black; padding: 2px;"> - Select a developmental need - - Select a developmental need - </div>	<input type="text"/>	<input type="text"/>	
<div style="border: 1px solid black; border-radius: 10px; padding: 5px; display: inline-block;">SUBMIT</div>			

Click on “SUBMIT.”

10. A summary page with the header “PMCDP FOR [Your Name],” the number of the competency, the chosen developmental need, the target date, completion date, and any comments will appear. You can accept these inputs and submit this developmental need for approval, edit the information, or update another competency. Click on one option.

PMCDP FOR

This activity has been added to your IDP. Click on 'Update current IDP' in the IDP menu above to process your IDP.

Competency ID:
 Developmental need:
 Target date:
 Completion date:
 Comments:

[\[Submit approval for rotational assignment\]](#) |
[\[Update another competency\]](#) | [\[Re-edit this competency\]](#)

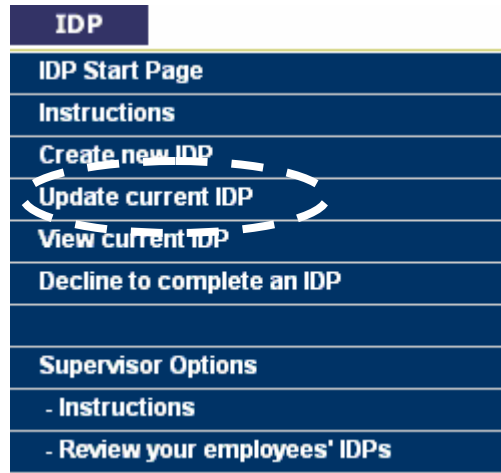
Options:

Submit for approval: This will generate an electronic message to the approving official you select requesting approval for this competency.

Re-edit this competency: This will bring you back to the original input screen for your update.

Update another competency: This will bring you back to the “Review/Update Competency” screen where you can select another competency to update.

11. This activity is automatically added to your IDP. Click on “IDP” on the top menu; choose “Update current IDP” to process your IDP.



- 12. If you choose “Submit approval for rotational assignment,” a screen with the header “PMCDP INDUSTRY ROTATION REQUEST FORM,” Step 1: Provide rotation assignment details” will appear.

PMCDP INDUSTRY ROTATION REQUEST FORM

Step 1: Provide rotational assignment details

Instructions: Complete as much of the form as possible. Click on the "Save and continue" button to select your managers.

* - Required field

Name:

Title:

Organization:

PMCDP competency: [1.1.2](#)

Target date:

Estimated travel costs: \$

Other costs (i.e. per diem, registration, etc.): \$

Rotation Dates: (mm/dd/yyyy) From: * To:

Location (city, state):

Justification: *

- 13. Enter the estimated travel costs (in whole numbers only: do not enter “\$” sign).

Step 1: Provide rotational assignment details

Instructions: Complete as much of the form as possible. Click on the "Save and continue" button to select your managers.

* - Required field

Name:

Title:

Organization:

PMCDP competency: [1.1.2](#)

Target date:

Estimated travel costs: \$

14. Enter other costs (i.e. per diem, registration, etc.) (in whole numbers only: do not enter "\$" sign).

* - Required field

Name:

Title:

Organization:

PMCDP competency: 1.1.2

Target date:

Estimated travel costs: \$

Other costs (i.e. per diem, registration, etc.): \$

15. Enter Rotational Dates (mm/dd/yyyy) for both "From" and "To" (required).

Other costs (i.e. per diem, registration, etc.): \$

Rotation Dates: (mm/dd/yyyy) From: * To:

16. Enter Location (city, state).

Estimated travel costs: \$

Other costs (i.e. per diem, registration, etc.): \$

Rotation Dates: (mm/dd/yyyy) From: * To:

Location (city, state):

17. Enter Justification (required).

Estimated travel costs: \$

Other costs (i.e. per diem, registration, etc.): \$

Rotation Dates: (mm/dd/yyyy) From: * To:

Location (city, state):

Justification: *

18. Click on "Save and continue."

Estimated travel costs: \$

Other costs (i.e. per diem, registration, etc.): \$

Rotation Dates: (mm/dd/yyyy) From: * To:

Location (city, state):

Justification: *

19. The screen “PMCDP INDUSTRY ROTATION REQUEST FORM, Step 2: Identify managers” will appear. You must choose your approving officials. Choose up to four approving officials, in accordance with program office direction. At least one of these four individuals must be the site/office manager (required).
 If none is shown or you wish update your selection, click on “Change.” If the approving official is correct, click on “Submit Request.”

PMCDP INDUSTRY ROTATION REQUEST FORM

Step 2: Identify managers

Instructions: Identify the managers that will approve this rotational assignment request below. The site manager that you selected in your PMCDP profile has already been filled in below.

* - Required field

First line manager (optional): *None selected*
 Second line manager (optional): *None selected*
 Third line manager (optional): *None selected*
 Site manager:*

Name of Approving Official here



Submit Request Cancel Request

20. If you chose “Submit Request,” a screen with the header “PMCDP FOR [Your Name]” and the number of the competency will appear. This is notifying you that an automatic email has been sent to the name/email address you have selected.
 You may update another competency or re-edit this competency. Choose one.

PMCDP INDUSTRY ROTATION REQUEST FOR

Your request for approval on your rotational assignment has been emailed to the first manager listed on this confirmation page. If they approve it, the next level manager listed below will then be notified. If approved, your site manager will then be notified, approve or disapprove the request, then submit your request for final approval to OECM.

Name:
 Competency ID:
 Target date:
 Estimated travel cost:
 Other costs:
 Rotation dates: From: To:
 Location:
 Justification:
 Your first level manager:
 Your second level manager:
 Your third level manager:
 Your field/site manager:

[\[Update another competency\]](#) | [\[Re-edit this competency\]](#)

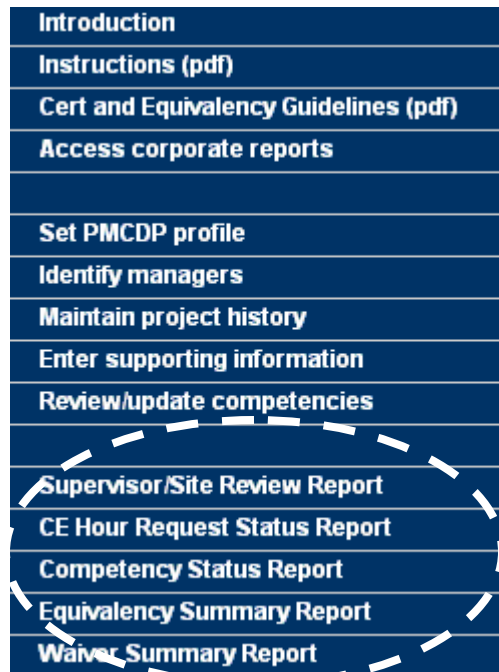
Reports

You may print out reports to review and evaluate your certification progress. There are five participant reports associated with the PMCDP. These reports are:

- ❖ **CE Hour Request Status Report** displays the status of approval of all Continuing Education hour requests.
- ❖ **Competency Status Report** displays the status of all competencies. It details the status of a competency in the approval process.
- ❖ **Equivalency Summary Report** displays a list of all competencies for which an equivalency was requested and the approval status.
- ❖ **Supervisor/Site Review Report** is designed to be used by program/site offices and the PMCDP Certification Review Board to document completion of competency requirements for certifying federal project directors in DOE.
- ❖ **Waiver Summary Report** displays a list of all competencies for which a waiver was requested and the approval status.

To view a report, after logging into ESS do the following:

1. Click on the “PMCDP” menu item at the top of the page. Select “CE Hour Request Status Report” or “Supervisor/Site Review Report” or “Competency Status Report” or “Equivalency Summary Report” or “Waiver Summary Report.”



CE Hour Request Status Report lists all requests for Continuing Education hours and his or her status in the approval process.

- 2. You may view the CE hour request, or add a new request.

PMCDP CE HOUR REQUEST STATUS REPORT FOR

[Add a new request](#)

	Category	Title	CE Hours Requested	Request Date	Line Manager Approval Date	OECM Approval Date	CE Hours Approved
View							
View							

Competency Status Report lists all competencies sent for approval.

- 3. You can update a competency or view justification or approving official comments.

[Text-only menu](#)

PMCDP COMPETENCY STATUS REPORT FOR

Competency ID (click for description)	Developmental Need	Equivalency	Verification Method	Approval Status or Date	Approved By	Employee's justification	Approving official's comments
1.1.1		Education & Experience	Observed			View	View
1.1.2		Education & Experience	Observed			View	View
1.1.3		Experience	Observed			View	View
1.2.1		PMI PMP	Professional Certificate/License			View	View
1.3.1		Education & Experience	Observed			View	View
1.4.1		Education & Experience	Observed			View	View
1.4.1		DMT DMTD	Professional			View	View

Equivalency Summary Report lists all competencies for which an equivalency has been entered.

- You can view a description of the competency, but not update it from this screen. To update an equivalency, see “Review/Update Competency” section in this tutorial.

PMCDP FOR
EQUIVALENCY SUMMARY REPORT

Competency ID	Equivalency	Justification for equivalency
1.1.2	Education & Experience	20 yrs exp in field
2.1.2	Experience	
4.12.2	Education & Experience	test

Waiver Summary Report lists all competencies and the justification for each competency.

- You can view a description of the competency, but not update it from this screen. To update an equivalency, see “Review/Update Competency” section in this tutorial.

PMCDP FOR
WAIVER SUMMARY REPORT

Competency ID	Justification for waiver
1.1.2	I waive review for this competency.
1.10.1	
1.10.2	
1.12.1	
1.12.2	
1.2.1	test test test
1.3.1	test
1.4.1	

Supervisor/Site Review Report is designed to be used by program/site offices and the PMCDP Certification Review Board to document completion of competency requirements for certifying federal project directors in DOE. This is the document that will be considered by the Certification Review Board to determine your qualification for certification.

- Click on “Supervisor/Site Review Report.” Your profile will appear in “landscape” format. All competencies that have a data entry will appear, with the applicable comments. You should print it out and check that all the data has rolled up into the final report. Any problems should be reported to the ESS hotline.

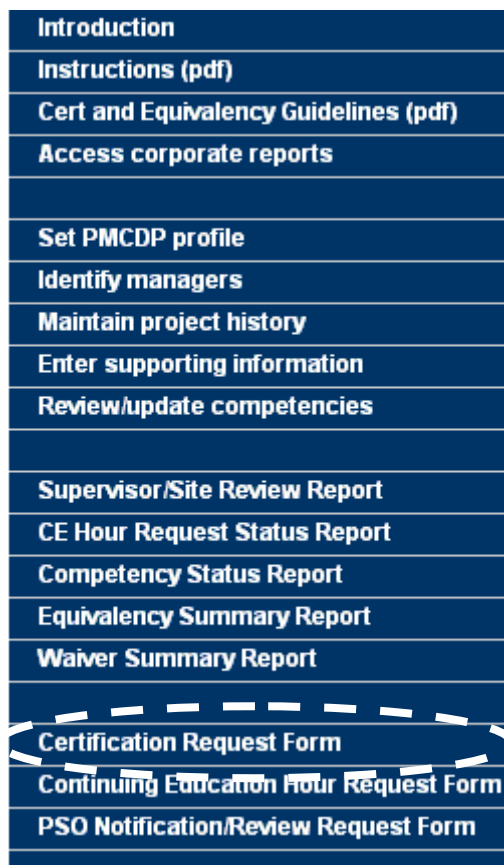
SUPERVISORY/SITE REVIEW OF FEDERAL PROJECT DIRECTOR COMPETENCIES FOR PMCDP CERTIFICATION AND PMCDP PROFILE			
<p>Site/Line Managers are requested to critically assess incumbent federal project directors' and candidate project directors' competencies leading to certification. It is expected that site/line managers will review appropriate documentation, conduct interviews as necessary, and/or consult with appropriate persons at site or program offices to adequately determine that candidates meet required competencies for federal project director certification within DOE/NNSA. Supervisory review of project director competencies should be evaluated using PMCDP Certification Equivalency Guidelines, which list detailed knowledge and skill requirements. By signing off on these competencies, the site/line manager signifies that she/he assures that their federal project directors and candidate project directors are certifiable according to the PMCDP module (DOE O 361.1, Change 2 initially issued June 13, 2003 and re-issued under DOE 361.1A, April 19, 2004) and should be regarded as candidates for the Certification Review Board's (CRB) consideration as certified federal project directors.</p>			
CERTIFICATION CANDIDATE NAME:			
PSO/AREA OFFICE:			
REQUESTED LEVEL OF CERTIFICATION:	PROJECT TPC:	PMCDP CLASSIFICATION:	
PHONE NUMBER:	EMAIL:	TITLE:	GRADE:
YEARS PROJECT MANAGEMENT EXPERIENCE IN DOE:	IN OTHER AGENCIES:	IN PRIVATE SECTOR:	
HIGHEST DEGREE EARNED:	FIELD OF STUDY:		
CERTIFICATES/LICENSES:			
License/Certification	License/Certification Number	Issued By	Issued In (state, country)
SITE MANAGER NAME:			
<p>Site Manager Signature: By signing off these competencies, I affirm that the individual is a federal project director or candidate project director and that she/he has the knowledge, skills, and abilities reflected below.</p>	Signature and Date:		
FIRST LINE MANAGER NAME:			
<p>First Line Manager Signature: By signing off these competencies, I affirm that the individual is a federal project director or candidate project director and that she/he has the knowledge, skills, and abilities reflected below.</p>	Signature and Date:		
Please indicate if First Line Manager is Supervisor: Yes No			
GENERAL COMMENTS:			
First line manager comments:			
Site manager comments:			

Certification Request

When all competencies have been approved for a level, certification for that level should be requested. Review your profile information (see “Reports” section of this tutorial).

After logging into ESS, to request certification:

1. Click on the “PMCDP” menu item. Select “Certification Request Form.”



- If you have not qualified to request a level of certification or all of your competencies have not been approved by your designated approving official, you will be shown a screen requesting you to review your competency status report.

PMCDP CERTIFICATION REQUEST FORM FOR

You have not qualified to request any level of certification or your competencies have not yet been approved by your Designated Approving Official. Please review your competency status report.

- If you have qualified to request a level of certification, you will be presented with a screen with the header “PMCDP CERTIFICATION REQUESTS FOR [Your Name].” Tables detailing your certification requests will be presented.

To review a request, Click on “View.”

To submit a new request, click on “Request certification.”

PMCDP CERTIFICATION REQUESTS FOR

Request Date	PM Level	Status	Details
			View

Eligibility for certification requests

PM Level	Status	Action
Level 1	Eligible	Request certification
Level 2	Eligible	Request certification
Level 3	Not Yet Eligible	None at this time
Level 4	Not Yet Eligible	None at this time

- 4. You will be presented with a screen with the header “PMCDP CERTIFICATION REQUEST FORM FOR [Your Name].” Your name, title, organization, and level of certification requested will be automatically entered. The level of certification indicated on the screen is automatically generated by ESS based upon the level of association in the PMCDP module.

Up to four approving officials may be chosen. Depending upon your program/office’s procedures, you may submit your request to up to four approving officials. At a minimum, a certification request is required for your first level manager and field/site manager.

To choose or change the approving official, click on “Change.”

PMCDP CERTIFICATION REQUEST FORM FOR

* - Required fields

Name:	
Title:	
Organization:	
Level of certification requested:	PM1
First line manager: *	None selected
Second level manager (optional):	None selected
Third level manager (optional):	None selected
Overall site/office manager: *	None selected

[Change](#)
[Change](#)
[Change](#)
[Change](#)

- 5. You will be presented with a screen with the header “PMCDP approving official search”
Type in the name: Last,First (no space between comma and first name).
Click “Submit.”

PMCDP approving official search

Search by name (last,first):
NOTE: No space between comma and first name

Manager name:

- 6. Repeat Steps 4 & 5 above to select all approving officials, in accordance with your program office protocol.

Click on "Submit for Approval" or "Cancel request."

PMCDP CERTIFICATION REQUEST FORM FOR

* - Required fields

Name:

Title:

Organization:

Level of certification requested: PM1

First line manager: *

Second level manager (optional):

Third level manager (optional):

Overall site/office manager: *

Approving Official Names Here

[Change](#)

[Change](#)

[Change](#)

[Change](#)

- 7. A screen with the header "PMCDP FOR [Your Name]" will appear summarizing your certification request, the persons who are being contacted, and the order in which they will be contacted. An electronic message will be sent to the approving officials selected notifying him or her of your certification request.

PMCDP FOR

Your request for Level certification approval has been sent to all program officials listed on this confirmation page. Once the site/office manager approval has been obtained, the Program Secretarial Official (PSO) should be notified that you are ready to be presented to the PMCDP Certification Review Board for review. Most PSOs require notification. If your PSO does not require such notification, you will select "No program official (PSO) notification/review required". Enter ESS, PMCDP module and select "PSO Certification/Review Request Form" from the menu.

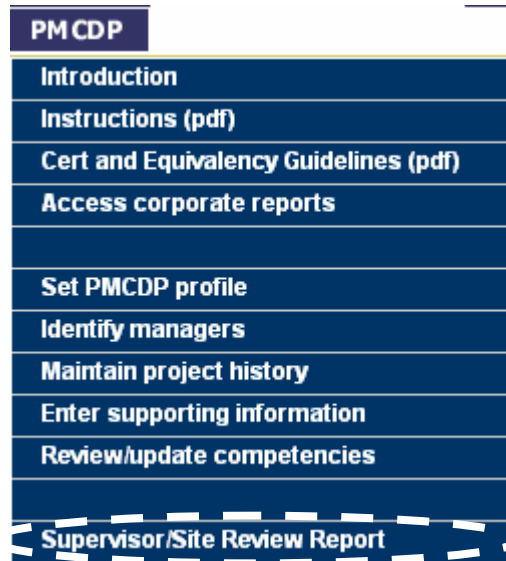
Name:

Program Official #1:

Program Official #4:

[Return to PMCDP Start Page](#)

8. Go to PMCDP Menu, click on “Supervisor/Site Review Report.” Print out a copy of your profile in “Landscape” layout. Have the first page of the hard copy signed by your first line supervisor and your site/office manager.

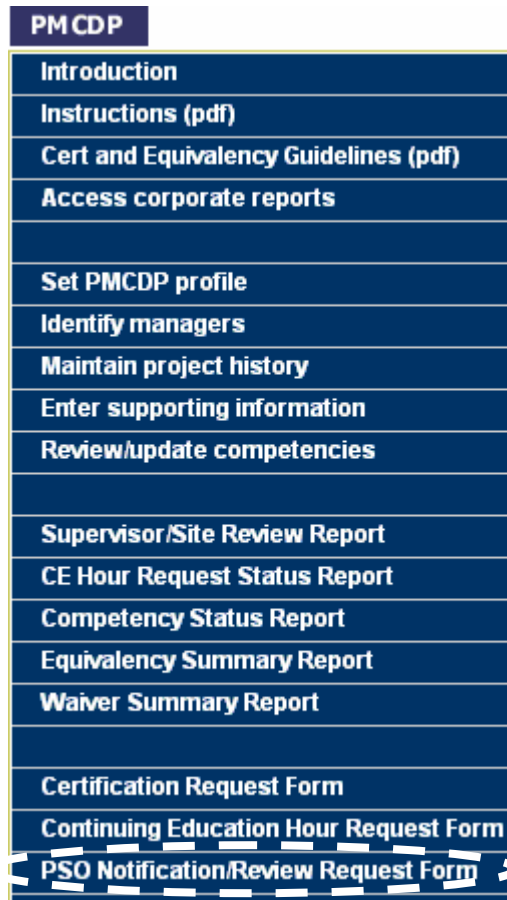


Based upon your program protocol, you should either fax/send the signed document to your PSO approving officials or to the Office of Engineering and Construction Management, MA-50, PMCDP Program Manager, Headquarters, Washington D.C. Questions may be forwarded to PMCDP.Administrator@hq.doe.gov.

PSO Certification Review Request

Once the site/office manager approval has been obtained, the PSO should be notified that you are ready to be presented to the PMCDP Certification Review Board for certification consideration. Most PSOs require notification. If your PSO does not require such notification, you must still follow the steps below and select “No program official (PSO) notification/review required.”

1. Click on the “PMCDP” menu item. Select “PSO Certification/Review Request Form.”



2. You will be presented with a screen titled “PMCDP PSO CERTIFICATION/REVIEW REQUESTS FOR [Your Name].” Click on “Submit a new request.”

[Text-only menu](#)

PMCDP PSO CERTIFICATION/REVIEW REQUESTS

You have not entered any requests for PSO certification.

[Submit a new request](#)

PSO Certification Review Request

3. A screen with the header “PMCDP PSO CERTIFICATION/REVIEW REQUEST FORM” with your name, title, and organization will be presented.

PMCDP PSO CERTIFICATION/REVIEW REQUEST FORM

INSTRUCTIONS: Once site/office approval has been obtained, your Program Secretarial Official (PSO) should be notified that you are ready to be presented to the PMCDP Certification Review Board for review. Most PSOs require notification. If your Program Official (PSO) does not require such notification, select “No Program Official (PSO) notification/review required” below. OEMC will automatically be notified that you are requesting certification review without Program Secretarial Official (PSO) participation.

*-Required field

Name:

Title:

Organization:

Level of certification requested:*

— Select a level — ▾

Program Official #1:*

None selected

[Change](#)

Program Official #2 (optional):

None selected

[Change](#)

Program Official #3 (optional):

None selected

[Change](#)

Program Official #4:

None selected

[Change](#)

No Program Official (PSO) notification/review required

You must either complete the requested program contact information or select “No program official (PSO) notification/review required.”

4. Select the level of certification requested. Click the down arrow to the right of “Level of certification requested.” Choose one.

Name:

Title:

Organization:

Level of certification requested:*

— Select a level — ▾

Program Official #1:*

None selected

[Change](#)

Program Official #2 (optional):

None selected

[Change](#)

Program Official #3 (optional):

None selected

[Change](#)

Program Official #4:

None selected

[Change](#)

PM Level 1: Responsible for projects with TPC between \$5M and \$20M.

PM Level 2: Responsible for projects with TPC between \$20M and \$100M.

PM Level 3: Responsible for projects with TPC between \$100M and \$400M.

PM Level 4: Responsible for projects with TPC exceeding \$400M.

- 5. Select up to four program officials to review your certification package. You must select at least one individual, the individual who has program office final approval for a PMCDP certification request.

To choose or change the approving official, click on “Change.”

Name: _____
Title: _____
Organization: _____

Level of certification requested: *

Program Official #1: *	<i>None selected</i>	Change
Program Official #2 (optional):	<i>None selected</i>	Change
Program Official #3 (optional):	<i>None selected</i>	Change
Program Official #4:	<i>None selected</i>	Change

- 6. You will be presented with a screen with the header “PMCDP approving official search.”
Type in the name: Last,First (no space between comma and first name).
Click “Submit.”

PMCDP approving official search

Search by name (last,first):

NOTE: No space between comma and first name

Manager name:

- 7. If your PSO does not require such notification, select “No Program Official (PSO) notification/review required.”

Name:

Title:

Organization:

Level of certification requested: *

Program Official #1: * *None selected* [Change](#)

Program Official #2 (optional): *None selected* [Change](#)

Program Official #3 (optional): *None selected* [Change](#)

Program Official #4: *None selected* [Change](#)

No Program Official (PSO) notification/review required

- 8. Repeat Steps 5 & 6 above to select additional approving officials, in accordance with your program office protocol.

Click on “Submit for approval,” “Cancel request, or “Clear changes.”

Name:

Title:

Organization:

Level of certification requested: *

Program Official #1: * [Change](#)

Program Official #2 (optional): [Change](#)

Program Official #3 (optional): [Change](#)

Program Official #4: [Change](#)

Approving Official Names Here

No Program Official (PSO) notification/review required

PSO Certification Review Request

- 9. You will be presented with a screen titled “PMCDP FOR [you name].” Your name and those of the program officials you have chosen will be listed in the order they were chosen.

PMCDP FOR

Your request for Level certification approval has been sent to all program officials listed on this confirmation page. Once all of the program officials have approved your request, the request is then sent to OECM for final approval.

Name:
 Program Official #1:
 Program Official #4:

Name here Official #1
 Name here Official #4

[Return to PMCDP Start Page](#)

You may return to the PMCDP start page by clicking on “Return to PMCDP Start Page.”

- 10. Once your PSO has completed its review and approved your certification request, you will receive an electronic message of his or her decision to approve or disapprove your request.

From: Administration, PMCDP	Sent: <input type="text"/>
To: <input type="text"/>	
Cc: <input type="text"/>	
Subject: PMCDP PSO Certification Request	

To:

Your PSO certification request has been approved by all of your selected Program Officials. The Office of Engineering and Construction Management (OECM) has been notified of your request.

Original request date: _____ on _____
 Approved by program official 1, _____ on _____
 Approved by program official 4, _____ on _____

- 11. OECM will be notified of your completed certification review.

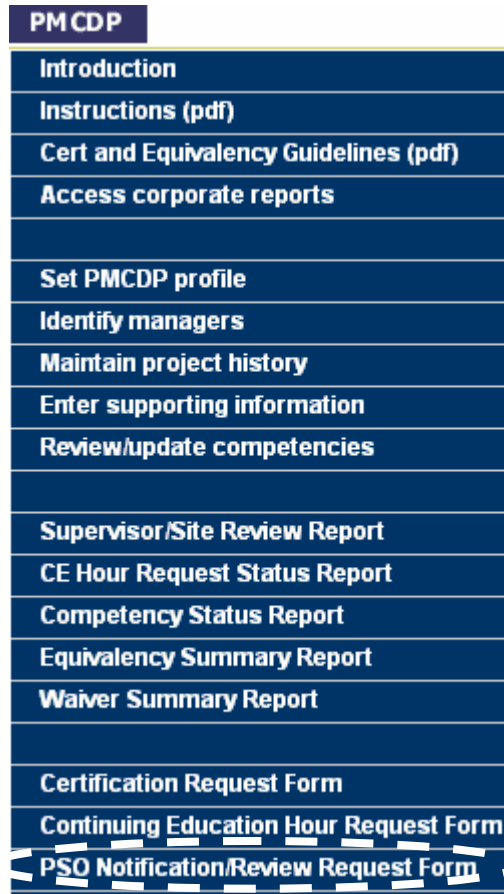
PMCDP PSO CERTIFICATION/REVIEW REQUEST FORM

OECM has been notified of your request for certification review by the PMCDP Certification Review Board.

[Return to the PMCDP start page](#)

PSO Certification Review Request

12. You may review the status of all certification request actions at the PMCDP Menu, “PSO Certification/Review Request Form.”



13. You will be presented with a table listing your request date, the level requested, and the actions taken to date. You may submit a new request by clicking on “Submit a new request.”

PMCDP PSO CERTIFICATION/REVIEW REQUESTS FOR

Request Date	Level Requested	Program Official Review Required	Level 1 Manager Approval Status	Level 2 Manager Approval Status	Level 3 Manager Approval Status	Level 4 Manager Approval Status
09/22/2005	Level One	Yes	Approved	Not selected by user	Not selected by user	Approved

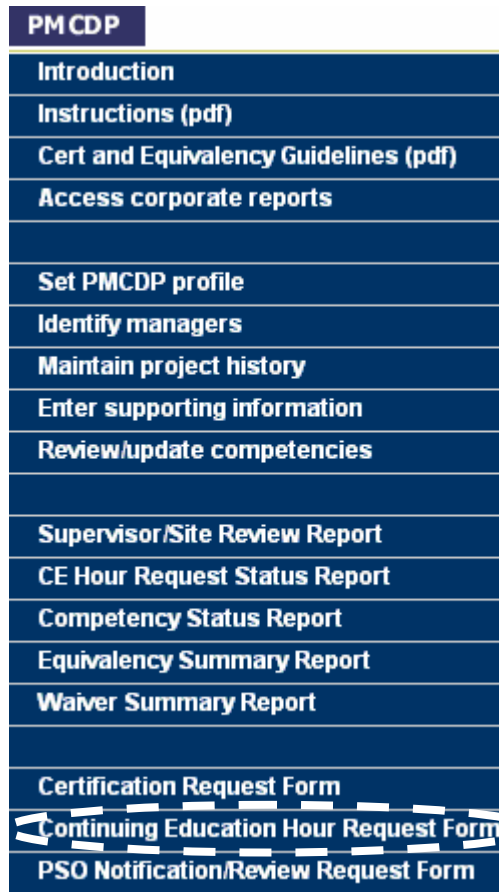
[Submit a new request](#)

14. Program offices must contact OECM and submit via electronic or DOE mail, a copy of the signed profile cover sheet in order for the package to begin OECM review. OECM will notify the PSO of a date for CRB review and/or interview. You will be contacted by your PSO or OECM for final details.

Continuing Education Hour Request

Refer to O361.1A, Chapter IV for guidance on CE hours. All person certified under PMCDP are required to maintain his or her certification through continuing education. A minimum of 60 CE hours must be obtained every two years, from the most current date of certification.

1. After logging into ESS, to request credit for having obtained a CE hour(s), click on the “PMCDP” menu item. Select “Continuing Education Hour Request Form.”



- 2. If you have no CE hour requests in the database, you will be presented with a screen that states that the database has no previous CE hour requests on file. Select “Add a new request.”

[Text-only menu](#)

PMCDP CE HOUR REQUEST STATUS REPORT FOR

You do not have any CE Hour requests in the database.

[Add a new request](#)

- 3. The PMCDP Continuing Education Hour Request Form will be presented that requires you to choose a CE hour category, the number of CE hours requested, the dates of the activity, a title (if applicable), course number (if applicable), provider, and course description (required). The course description field has a 2,000 character maximum.

PMCDP CONTINUING EDUCATION HOUR REQUEST FORM

Instructions: CE hour requests must be approved by your first line manager. This request will be automatically sent to the person you identified as first line manager in your profile. If this person has changed since your initial profile entry, please update this information before submitting a CE hour request.

[Continuing Education Credit Assignments](#) | [Specific instructions on Incumbent FPD category](#)

*-Required fields

Name: _____

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): * From: To:

Title: *

Course number:

Provider:

Course/Activity Description: * (2000 character max)

4. CE Hour Category. Click the down arrow to the right of the “CE Hour Category” drop down box to display a list of choices. Select one (required). If you are not clear whether or not you qualify as an “incumbent” project director, click on the top of the screen on “Specific Instructions on Incumbent FPD category” for additional information.

PMCDP CONTINUING EDUCATION HOUR REQUEST FORM

Instructions: CE hour requests must be approved by your first line manager. This request will be automatically sent to the person you identified as first line manager in your profile. If this person has changed since your initial profile entry, please update this information before submitting a CE hour request.

[Continuing Education Credit Assignments](#) | [Specific instructions on Incumbent FPD category](#)

Name:

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): *

Title: *

Course number:

Provider:

Course/Activity Description: * (2000 character max)

— Select a category —

— Select a category —

Academic courses at an accredited college or university

Audited academic courses at an accredited college or university

DOE Training

Educational portion of technical meetings, conferences, workshops and seminars

Focused training/short courses by commercial vendors

Instructing at an accredited college or university

Level 3 or 4 certified FPD serving as a Sponsor/SME for one or more PMCDP Courses

Level 4 certified FPD serving as a mentor to a Level 3 candidate

Participation as a member of a project review team

Preparation for a project review

Presentations at workshops, conferences and seminars

Serving as an incumbent FPD

- Academic course at an accredited college or university
- Audited academic courses at an accredited college or university
- DOE Training
- Educational portion of technical meetings, conferences, workshops, and seminars
- Focused training/short courses by commercial vendors
- Instructing at an accredited college or university
- Level 3 or 4 certified FPD serving as a Sponsor/SME for one or more PMCDP Courses
- Level 3 or 4 certified FPD serving as a mentor to a Level 3 candidate.
- Participation as a member of a review team
- Presentations at workshops, conferences, or seminars
- Serving as an incumbent FPD

- 5. Enter the number of CE hours in the “Number of CE Requested” field (required).

The CE hour assignments table below can be accessed from the top of the screen by clicking on “Continuing Education Credit Assignments.”

[Continuing Education Credit Assignments](#) [Specific instructions on Incumbent FPD category](#)

*-Required fields

Name:

CE Hour category: *

Number of CE Hours
requested: *

The Continuing Education Credit Assignments table is on the following page.

Continuing Education Credit Assignments

Training/Continuing Education (CE) Opportunity Description	Unit	=	DOE CE Credit Hours
Educational portions of technical meetings, conferences, workshops, and seminars; DOE training; and focused training and short courses provided by commercial vendors	1 hour	=	1
Academic courses at an accredited college or university	1 semester credit	=	15
	1 quarter credit	=	9
Audited academic courses at an accredited college or university	1 semester credit	=	5
	1 quarter credit	=	4
Presentations at workshops, conferences, and seminars	1 formal presentation	=	5
Instructing at an accredited college or university	1 semester credit	=	10
	1 quarter credit	=	9
Certified Level 3 or 4 FPD serving as mentor to certification candidate. A formal written mentoring agreement is required for the mentoring development activity and is also required to be documented in both mentor and certification candidate Individual Development Plans (IDP). Additionally, Level 3 and 4 certified FPDs serving as mentors are encouraged to take Departmental mentoring courses.	6 months mentoring a certification candidate	=	30
Participation as <u>member</u> of a project review team (i.e., IPRs, EIRs, independent cost reviews, earned value management validation reviews)	1 work day (team convened)	=	8
Participation as project review team <u>member</u> in preparation for a review (i.e., IPRs, EIRs, independent cost reviews, earned value management validation reviews)	Maximum per review	=	8
Serving as an incumbent FPD* (Maximum 10 CE hour credit for 2-year certification period)	1 year	=	5
Carryover allowed per certification period. If FPD is certified to a higher level, this will still apply.	Maximum carryover	=	20
Serves as a Sponsor/Subject Matter Expert (SME) for one or more PMCDP courses (Applies to Level 3 or Level 4 certified FPDs)	Serves as SME for at least one year	=	15

* Incumbent FPDs are those formally appointed to direct Capital Assets in accordance with DOE Order 413.3A, *Program and Project Management for the Acquisition of Capital Assets*.

6. Enter the date earned in the “From” field and “To” field (mm/dd/yyyy) (required).

Name:

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): *

7. Enter the title/name of the course, conference, activity, etc. in the “Title” field (required).

Name:

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): *

Title: *

8. Enter the course number in the “Course Number” field, if applicable.

Name:

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): *

Title: *

Course number:

9. Enter the name of the provider in the “Provider” field, if applicable.

Name:

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): * From: To:

Title: *

Course number:

Provider:

10. Enter a description of the course/activity, learning objectives, and outcomes in the “Course/Activity Description” field (required). Provide as much detailed information as possible.

Name:

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): * From: To:

Title: *

Course number:

Provider:

Course/Activity Description: * (2000 character max)

11. Click on “Submit request,” “Clear form,” or “Exit without saving.”

Name:

CE Hour category: *

Number of CE Hours requested: *

Dates earned (mm/dd/yyyy format): * From: To:

Title: *

Course number:

Provider:

Course/Activity Description: * (2000 character max)

12. If you choose “Submit request,” a screen with the header “PMCDP CE Hour Request Verification” detailing the CE hour request will appear. Review the information. If it is complete and correct, click on “Yes.”

PMCDP CE Hour Request Verification

Here is the request you are about to submit

Name:
CE Hour Category:
Number of CE Hours Requested:
Dates earned:
Title:
Course number:
Provider:
First line manager:
Course description: took a progr course

Do you want to submit this request?

13. A screen with the header “PMCDP CE HOUR REQUEST STATUS REPORT FOR [Your Name] will be presented that confirms your CE request to your approving officials. It details the category, title, number of CE hours requested, Request Date, Line Manager Approval Date, OECM Approval Date, and CE hours approved.

PMCDP CE HOUR REQUEST STATUS REPORT FOR

Your request has been sent to your manager(s) for approval.

[Add a new request](#)

Category	Title	CE Hours Requested	Request Date	Line Manager Approval Date	OECM Approval Date	CE Hours Approved
View						0

To make another CE request, click on “Add a new request,” and repeat steps 4–12 of this section.
 To view a previous request, click on “View” for details.

14. If you choose “View,” you will be presented with a screen detailing all the information you have provided for the CE hour activity, including approval dates and comments, as well as the option to reroute the request to another line manager.

View a PMCDP CE Hour request

Request date:	
Requestor:	
Category:	
Title:	
Dates earned from/to:	
CE Hours requested:	
Activity description:	
Line manager/ approval date:	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Name of manager here</div> (Change Manager)
OECM approval date:	
OECM approval status:	
Number of CE Hours approved:	
OECM Comments:	

If you choose another line manger, this will change your choice of line manager for your overall PMCDP profile. Click “(Change Manager).”

- 15. Change Manager. You will be presented with a screen which allows you to request another approving official/first line manager for your CE hour request(s). Click on “Change.”

If you want to change approving officials for more than one request, you must update each CE hour request individually.

Change your managers for this CE Hour request

NOTE: This form will change your managers for this CE request as well as the managers in your overall PMCDP profile. If you have other CE Hour request with the incorrect manager, you must update each CE request individually.

*-Required fields

CE Request ID

Request Date

Request Title

First line manager:*

[Change](#)

Save/Send Request

Cancel/Go Back to CE Hour Summary

- 16. You will be taken to the first line manager search screen. Enter the name Last,First with no space between the comma and the first name (Example: Smith,Jane). Click “Submit.”

PMCDP first line manager search

Search by name (last,first):

NOTE: No space between comma and first name

Manager name:

Submit

Cancel

17. Once your CE hour request has been acted upon by your line manager and your site/office manager, you will receive electronic messages notifying you of the result.

From: Administration, PMCDP
Sent:
To:
Cc:
Subject: PMCDP CE Hour Request Approved
Importance: High

To

Your request for CE hours has been approved by your first line and/or site manager. The Office of Engineering and Construction Management (OECM) have been notified of your request for CE hours. Final approval by OECM is required for CE hours to be accepted for biennial continuing education requirements.

Original request date:
Category:
Title:
Dates earned from/to:
CE hours requested:
Activity description:

Approved by line manager on
Approved by site manager on

To: OECM/PMCDP Administrator

To approve/disapprove this request:

- Login to your ESS account at

Go to the PMCDP menu and click on "Approve/Review CE Hour Requests" under the "Approving Official Options."

18. OECM will review your request and either approve, disapprove, or place it on hold.

If your request is approved by OECM, you will receive an electronic message giving you the results of his or her determination.

From: PMCDP.Administrator@hq.doe.gov
Sent:
To:
Cc: PMCDP.Administrator@hq.doe.gov
Subject: PMCDP CE hour request approved
Importance: High

OECM has approved your CE hour request in Employee Self Service.

Request date:
Category:
Title:
Dates earned from/to:
CE hours requested: CE hours approved: Activity description: Comments from OECM administrator:

19. If your request is denied by OECM, you will receive an electronic message giving you further instructions.

From: PMCDP.Administrator@hq.doe.gov
Sent:
To:
Cc: PMCDP.Administrator@hq.doe.gov
Subject: PMCDP CE hour request disapproved
Importance: High

To:

OECM has not approved CE hour request in Employee Self Service. Please contact OECM to arrange for discussion on the issues.

Request date:
Category:
Title:
Dates earned from/to:
CE hours requested:
CE hours approved:
Activity description:

Comments from OECM administrator:

20. If your request has been placed on hold, you will receive an electronic message giving you further instructions.

From: PMCDP.Administrator@hq.doe.gov
Sent:
To:
Cc: PMCDP.Administrator@hq.doe.gov
Subject: PMCDP CE hour request placed on hold
Importance: High

To:

OECM has placed your CE hour request on hold and will be in contact with you shortly.

Request date:
Category:
Title:
Dates earned from/to:
CE hours requested:
CE hours approved:
Activity description:

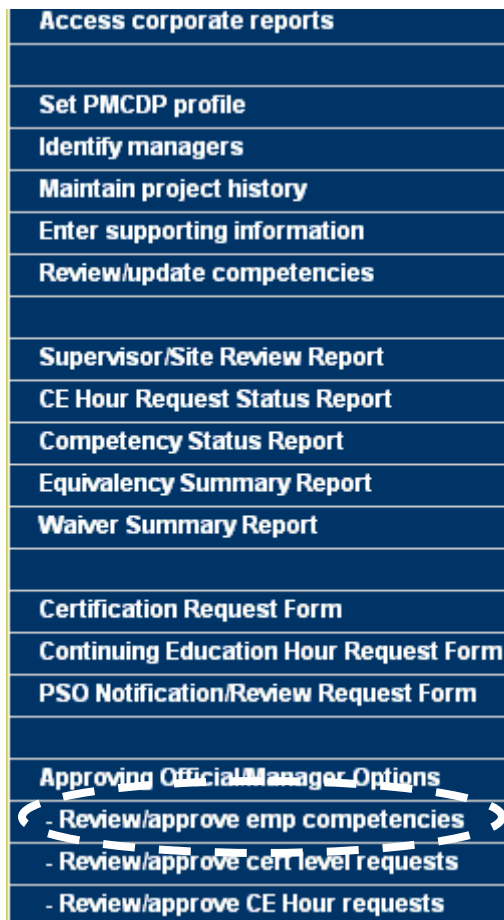
Comments from OECM administrator:

Approving Official

Persons who have been identified by the PMCDP participant as his or her approving official have the responsibility to act upon requests for competency completion, certification, and continuing education completion.

Review and Approval of Competency

1. Once you have received an email stating that a certification request is ready for your review and approval on ESS, login to ESS.
2. Click on the “PMCDP” menu item. Select “Review/approve employee competency.”



3. A screen with a table listing all employees who have chosen you as the approving official will be presented. The table listing is presented alphabetically by the employee’s last name. Also listed are the competency number being addressed, the current status, and date of the employee’s initial request for approval, the action taken, and the date of final approval of the competency.

PMCDP - Employee Summary

Designated Approving Official:

Click on any of the links below to view the details for each employee. Click on any of the linked column titles to sort the accordingly. The table is sorted by whichever column title is displayed in **red**.

Name	Competency	Status	Date of Employee's Initial Request	Action	Date of Final Approval
	1.1.1	Approved		Change status	
	1.7.1	<i>Approval Requested</i>		Change status	
	1.9.1	<i>Approval Requested</i>		Change status	

This table can be sorted by clicking on the category title:

- Name
- Competency
- Date of Employee’s Initial Request
- Date of Final Approval

The category title will turn red indicating that you have sorted the table by this category.

To take action on a request, click on Action column, “Change status.”

- 4. A summary screen for the employee and the specific competency in question will appear listing the designation and the employee's justification.

PMCDP - Employee Summary

Designated Approving Official:

NOTE: clicking on the SAVE button will save the status selected. Email will be sent to the employee notifying them of approval status. If this competency is disapproved, entry is required in the 'Comments' field.

Employee being evaluated:

Competency being evaluated:

[1.1.1](#) | Competency Level: **PMI**

Designation:

Equivalency - Education & Experience

Employee's justification:

Select Status: *

Comments: *

*-Required field

5. Click the down arrow to the right of the “Select a status” field to display a list of choices. Select the appropriate choice.

- Approved
- Pending
- Disapproved

PMCDP - Employee Summary

Designated Approving Official:

NOTE: clicking on the SAVE button will save the status selected. Email will be sent to the employee notifying them of approval status. If this competency is disapproved, entry is required in the 'Comments' field.

Employee being evaluated:
Competency being evaluated: [1.2.1](#) | Competency Level: PMI
Designation: **Equivalency - Education & Experience**

Employee's justification:

Select Status: *

Comments: *

*-Required field

If a competency is disapproved, entry is required in the “Comments” field. OECM encourages the approving official to enter comments for any status selection as a form of documentation regarding his or her decision.

Click on the “Submit” button.

Review and Approval of Certification Request

1. When an employee has completed all the core competencies for the requested certification level, an email will be sent to you notifying you that an employee is applying for certification. Login to ESS, select PMCDP Menu, and “Review/Approve Certification Level Requests.”



2. A PMCDP Certification Request Summary will be presented, listing all employees who have chosen you as the approving official. The table is alphabetical by the employee by last name.

Click on any of the links below to view the details for each employee. Click on any of the linked column titles to sort the table accordingly. The table is sorted by whichever column title is displayed in **red**.

Name	Cert Level Requested	Status	Date of Employee's Initial Request	Action	Date of Final Approval
	PM2	<i>Approval Requested</i>		Change status	
	PM1	<i>Approval Requested</i>		Change status	

This table can be sorted by name, competency, date of employee’s initial request, or the date of the final approval by clicking on the title. The title will turn red indicating that you have sorted the table by this category.

To take action, click on Action column, “Change Status.”

3. A screen with the header “PMCDP – set certification status” will be presented. Click the down arrow to the right of the “Select Status” drop down box to display a list of choices. Select the appropriate choice.

- Approved
- Pending
- Disapproved

PMCDP - Set certification status

Manager:

NOTE: clicking on the SAVE button will save the status selected. Email will be sent to the employee notifying them of approval status. If this competency is disapproved, entry is required in the 'Comments' field.

Employee being evaluated: _____

Certification level requested: **PM1**

Employee's competency status report: [Click to view](#)

Field/site manager's name/comments: _____

Select Status:

Comments:

*-Required field

4. If a competency is disapproved, an entry is required in the “Comments” field.
It is recommended that comments be made if you choose “pending” to delineate the issue(s) and an anticipated resolution date. You may enter comments no matter what status is chosen.

PMCDP - Set certification status

Manager:

NOTE: clicking on the SAVE button will save the status selected. Email will be sent to the employee notifying them of approval status. If this competency is disapproved, entry is required in the 'Comments' field.

Employee being evaluated: _____
Certification level requested: PMI
Employee's competency status report: [Click to view](#)
Field/site manager's name/comments: _____

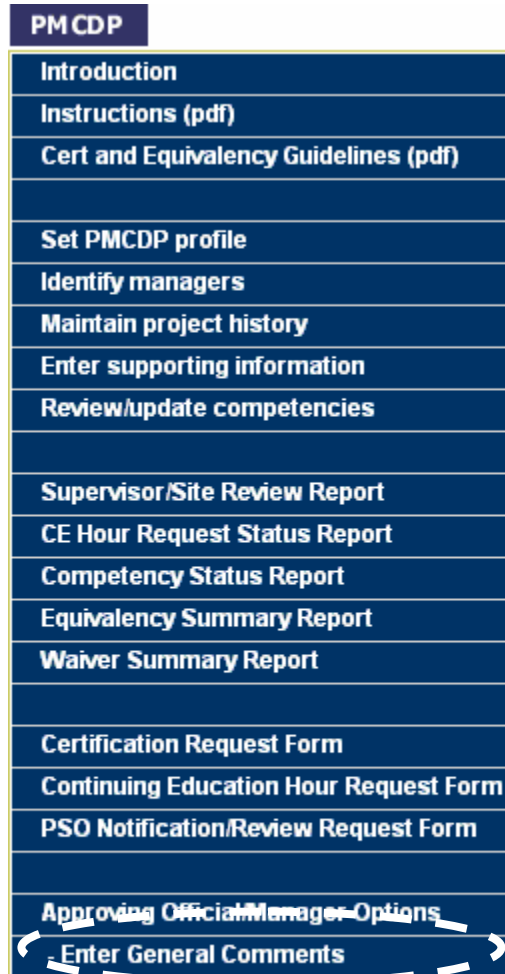
Select Status: *

Comments: *

*-Required field

Click on “Submit.”

- 5. To add comments to the “General Comments” section at the bottom of the first page of the Supervisory/Site Review Participant Profile, go the PMCDP Menu and select “Enter General Comments.”



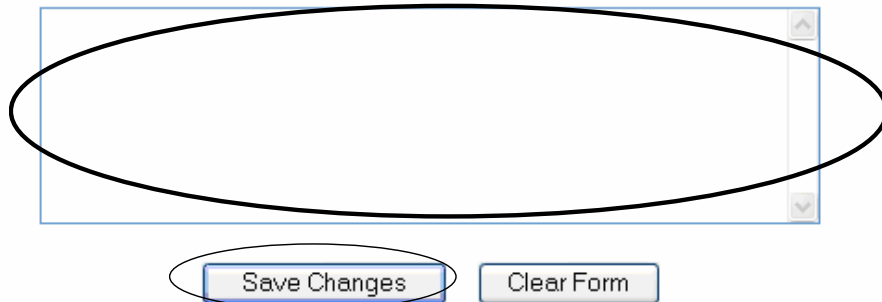
6. You will be presented with a screen with the header “Enter general comments FOR [Name of PMCDP Participant].” Enter comments in text box (2,000 character limit).

Click on “Save Changes.”

Enter general comments for

INSTRUCTIONS: First Line Manager and/or Site Manager may enter comments that will appear in the "General Comments" section at the bottom of the first page of the Supervisory/Site Review Participant Profile (2000 character limit).

Click on "Save Changes" to save your data.



The screenshot shows a web interface for entering general comments. At the top, there is a header "Enter general comments for". Below this is a block of instructions: "INSTRUCTIONS: First Line Manager and/or Site Manager may enter comments that will appear in the 'General Comments' section at the bottom of the first page of the Supervisory/Site Review Participant Profile (2000 character limit)." Underneath the instructions, a text prompt says "Click on 'Save Changes' to save your data." The main part of the form is a large, empty text area with a blue border and a vertical scrollbar on the right side. Below the text area are two buttons: "Save Changes" and "Clear Form". The "Save Changes" button is highlighted with a blue border and a black oval, and the "Clear Form" button is also highlighted with a black oval.

7. You will be presented with a screen confirming your action. You may return to the profile and review your inputs by clicking on “Click here to view this participant’s profile report.”

Enter general comments for

The text you entered has been saved.

[Click here to view this participant's profile report](#)

-
8. This completes your ESS actions for this profile unless additional and/or clarifying information is requested from the federal project director based upon additional PSO and/or OECM reviews.
-

CE Hour Review and Approval

1. When an electronic message is received notifying you that one of your PMCDP participants is requesting CE hour approval through ESS, you must review the request and approve, disapprove, or put the request on hold. This process does not require you to log on to ESS. A URL hyperlink will be embedded into the notification email.

From:
Sent:
To:
Subject: PMCDP request for CEU approval
Importance: High

To:

has made the following request for CE approval through
Employee Self Service (ESS):

Category:

Title:

Dates earned from/to:

CEUs requested:

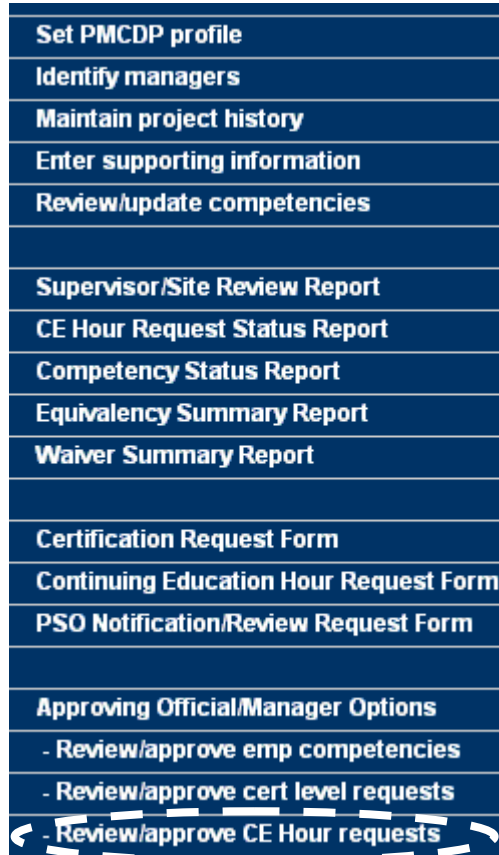
Activity description:

To review this request, click on the following link to approve or disapprove the request

http://misdev2.hr.doe.gov/ess/secure/PMCDP_CEU_approval_form

Click on the hyperlink to access the one page approval form. You are required to enter your ESS password for security purposes.

2. You may also access this information from the PMCDP Menu, select “Review/approve CE hour requests.”



Set PMCDP profile
Identify managers
Maintain project history
Enter supporting information
Review/update competencies
Supervisor/Site Review Report
CE Hour Request Status Report
Competency Status Report
Equivalency Summary Report
Waiver Summary Report
Certification Request Form
Continuing Education Hour Request Form
PSO Notification/Review Request Form
Approving Official/Manager Options
- Review/approve emp competencies
- Review/approve cert level requests
- Review/approve CE Hour requests

- 3. You will be presented with the PMCDP CE Hour Pending Request Summary. To act upon a CE hour request, choose the participant and click on Action column, "Change Status."

**PMCDP Administration
CE Hour Pending Request Summary**

Click on any of the radio buttons to display the requests of a particular status in the CE Hour request queue.

STATUS:: Pending On Hold Approved Disapproved ALL

Name	Title	CE Hours requested	Date Requested	OECM Status	CE Hours approved	Date Approved	Action
							Change status
							Change status

- 4. You will be presented with a CE Hour Request Summary. This summarizes the request and allows you to assign CE hours and approve, disapprove, or put on hold this request.

PMCDP CE Hour Request Summary

NOTE: Clicking on the SAVE button will save the status selected. Email will be sent to the employee notifying them of approval status and number of CE Hours approved.

Requestor:

Category:

Title:

Dates earned from/to:

CE Hours requested:

Activity description:

Line manager/approval date:

Select Status: *

- Select a status - ▾

Number of CE Hours approved: *

Comments: *

*-Required field

Submit Cancel

5. To update the status of this request, click the down arrow to the right of the “Select Status” drop down box to display a list of choices. Select the appropriate choice (required).

- Approved
- Pending
- Disapproved

Select Status:*

Number of CE Hours approved:*

Comments:*

*-Required field

The screenshot shows a form with three fields: 'Select Status:', 'Number of CE Hours approved:', and 'Comments:'. The 'Select Status:' field is a dropdown menu with the text '- Select a status -' and a downward arrow. This dropdown menu is circled in black. The 'Number of CE Hours approved:' field is a small text box. The 'Comments:' field is a larger text area with scrollbars. A legend below the fields indicates that an asterisk (*) denotes a required field.

6. Enter the number of CE hours you have approved in the text box next to “Number of CE Hours approved” (required).

Select Status:*

Number of CE Hours approved:*

Comments:*

*-Required field

The screenshot shows the same form as in step 5. In this screenshot, the 'Number of CE Hours approved:' text box is circled in black. The 'Select Status:' dropdown menu is also visible but not circled. The legend below the fields indicates that an asterisk (*) denotes a required field.

7. Enter applicable text into the text box next to “Comments” (required).

Number of CE Hours approved:*

Comments:*

*-Required field

The screenshot shows the same form as in step 5. In this screenshot, the 'Comments:' text area is circled in black. The 'Number of CE Hours approved:' text box is also visible but not circled. The legend below the fields indicates that an asterisk (*) denotes a required field.

8. Submit CE hour decision. Click on “Submit.”

Select Status: *

Number of CE Hours approved: *

Comments: *

*-Required field

9. Once you have approved, disapproved, or put on hold the CE hour request, an electronic message will be sent to the certified federal project director and OECDM notifying him or her of this action.

From: Administration, PMCDP
Sent:
To:
Cc:
Subject: PMCDP CE Hour Request Approved
Importance: High

To

Your request for CE hours has been approved by your first line and/or site manager. The Office of Engineering and Construction Management (OECDM) has been notified of your request for CE hours. Final approval by OECDM is required for CE hours to be accepted for biennial continuing education requirements.

Original request date:
Category:
Title:
Dates earned from/to:
CE hours requested:
Activity description:

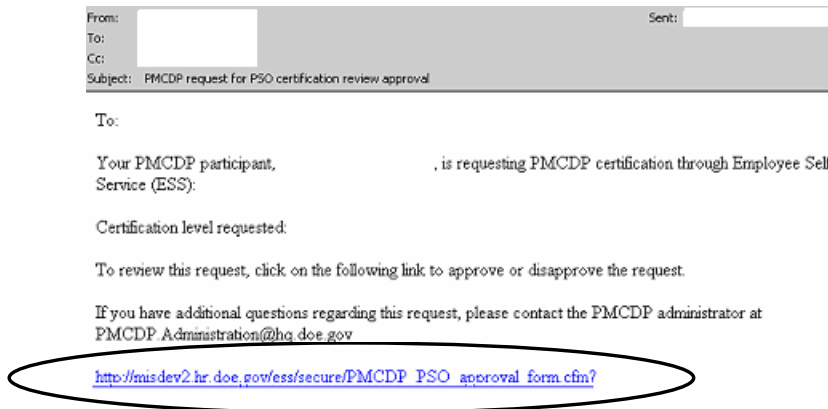
Approved by line manager on
Approved by site manager on

10. OECM will take the final action on approval of the CE hour request and notify the approving official and certified federal project director if his or her determination is different from the request.
-

PSO Certification/Review Approval

1. When an electronic message is received notifying you that one of your PMCDP participants is requesting PMCDP certification through ESS, you must review the request and approve, disapprove, or put the request on hold. This process does not require you to log on to ESS.

Click on the electronic hyperlink located at the bottom of the notification email or contact the PMCDP administrator as directed.



2. You will be presented with the “PMCDP PSO Notification/Review Approval Form.”

PMCDP PSO Notification/Review Approval Form

Please review the information presented in the request below and either approve, disapprove or keep the request on hold by clicking on the appropriate button at the bottom of this page. Final approval of the request is at the discretion of OECM.

Your ESS password is required. A 'Comment/Reason' is required when disapproving the request.

Approver: .
Requestee's name:
Request date:
Certification level requested:

ESS Password

Comment/Reason

[Click here to view this participant's profile report](#)

3. Your ESS password is required for you to take action on this request. Type in password in text box labeled: "ESS Password."

ESS Password

-
4. If you wish to review the participant's profile, click on the jump site "Click here to view this participant's profile report."

[Click here to view this participant's profile report](#)

-
5. Once you have completed your review, you must approve, disapprove, or put this request on hold. Choose one option.

[Click here to view this participant's profile report](#)

-
6. A comment/reason is required for not approving the request for certification. Enter applicable comments in text box labeled "Comment/Reason."

Comment/Reason

7. Once you have approved the certification request, you will be presented with a screen confirming your action. An electronic message will be automatically sent to OECM notifying him or her of this approval. OECM will begin its review for presentation to the Certification Review Board.

PMCDP PSO Certification Approval Form

**You have approved the PSO certification request.
OECM has been notified of this PSO certification approval.**

Close window

END OF TUTORIAL

For additional information contact the PMCDP Administrator at PMCDP.Administrator@hq.doe.gov