FSA
HANDBOOK

Employee Development and Training

For All FSA Offices

SHORT REFERENCE

6-PM
(Revision 6)

UNITED STATES DEPARTMENT OF AGRICULTURE
Farm Service Agency
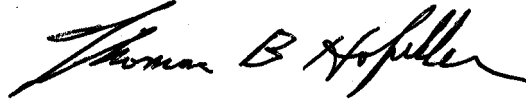P.O. Box 2415
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UNITED STATES DEPARTMENT OF AGRICULTURE
Farm Service Agency
Washington, DC 20250

Employee Development and Training 6-PM (Revision 6)	Amendment 17

Approved by: Associate Administrator for Operations and Management

[signature: Thomas B Hofeller]

Amendment Transmittal

A Reasons for Amendment

Subparagraphs 5 C, 5 E, and 137 B have been amended to change CED trainee to COT, where applicable.

Subparagraph 136 F has been amended to change program assistant to program technician.

Subparagraph 20 C has been amended to update the training facility training aids list.

Paragraph 116 has been amended to update leadership development training procedure.

Paragraph 117.5 has been added to provide Leadership Development Program requirements for the National, Kansas City, and St. Louis Offices, and APFO **only**.

Subparagraph 191 I has been amended to reference the AgLearn documentation requirement.

Subparagraph 192 B has been amended to include DD's.

Page Control Chart		
TC	Text	Exhibit
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Part 1   General Provisions

1   Overview

A
Handbook
Purpose

This handbook is applicable to all offices and employees. It contains employee development, training, and staff planning responsibilities.

B
Sources of
Authority

The provisions of this handbook are authorized under:

- the Government Employees Training Act (Pub. L. 85-507)
- 5 CFR 410
- OPM requirements
- USDA requirements
- other administrative authority.

C
Government-
Sponsored
Training
Programs

It is necessary, desirable, and in the public interest that self-education, self-improvement, and self-training by employees be supplemented and extended by Government-sponsored programs to promote efficiency and economy in operating the Government.

These programs shall:

- improve individual and organizational performance and assist in achieving the Agency's mission and performance goals

- be designed to lead to:

  - lower turnover of personnel

  - uniform administration of training

  - fair and equitable treatment of employees with respect to training.

1   Overview (Continued)

D
FSA Training
Objectives

FSA's training objectives are to improve farm program administration to better serve the public by providing:

- intensive orientation and training of new personnel

- training to improve:

  - the knowledge, skills, and abilities of committee members and employees in their present jobs

  - supervisory and management practices

- career enhancement and development opportunities

- employee development and training opportunities for employees regardless of:

  - race
  - color
  - age
  - sex
  - national origin
  - religion
  - marital status
  - disability
  - membership or nonmembership in an employee organization

- *--training that is not offensive to, or designed to change, participants' personal values or lifestyle outside the workplace.--*

1   Overview (Continued)

E   Organizational Relationships

Organizational relationships are shown in this subparagraph.

FSA Guidance. HRD shall provide overall FSA-wide employee development and training program guidance.

Primary Responsibility. Each unit head shall provide employee development and training programs for the unit. HRD and training specialists shall assist with these programs.

Day-to-Day Operations. Training coordinators shall carry out the policies and programs of the unit head. Unit heads shall designate training coordinators/contacts.

Advice and Planning Assistance. HRD shall provide advice and assistance to unit heads and training coordinators/contacts.

* * *

F   Related Handbooks

FSA handbooks related to employee development and training include:

- *--97-FI for out-of-pocket expenditures--*
- 98-FI for appropriation codes
- 27-PM for COT training
- *--27-AS for off-site meetings, conferences, trainings sessions, and ceremonies.--*

2   HRD Responsibilities

A Delegating Responsibilities

FSA is responsible for employee development and training programs. Responsibility for FSA employee development and training programs is delegated to the Director, HRD, through DAM.

B Policy Responsibilities

HRD, TDB is responsible for managing FSA employee development and training programs, which include:

- providing professional development, technical, career counseling, guidance, interpretation, and advisory assistance to FSA employees on the application and requirements of:

  - training laws
  - regulations
  - policies
  - procedures

- establishing and maintaining employee development and training program standards

- providing staff leadership throughout FSA

- recommending, formulating, and developing national policy

- providing training instructions.

2   HRD Responsibilities (Continued)

C   Program Responsibilities

HRD, TDB's program responsibilities include the following:

- coordinating the program, developing procedures, and monitoring and evaluating training

- evaluating the overall effectiveness of the FSA employee development and training programs

- coordinating national training needs assessments

- analyzing FSA management and program operations to determine program training needs

- supervising national training programs

- arranging, conducting, and evaluating training courses for National Office employees

- ***--**assisting other offices in planning, coordinating, conducting, and evaluating training meetings

- providing technical support and FSA system administration for AgLearn**--***

- monitoring HRD, KCHRO, Employee Development Section training activities to ensure that they are according to FSA training policies.

2   HRD Responsibilities (Continued)

D   Administrative Responsibilities

HRD, TDB's administrative duties include the following:

- providing information and training to FSA employees

- *--processing training requests and inputting information into AgLearn--*

- maintaining required records on training

- assisting division and staff training coordinators/contacts in carrying out their training responsibilities

- selecting training locations and facilities

- establishing and maintaining a Career Development Center

- establishing and maintaining a training resource library for National Office employees

- *--researching latest training systems, techniques, materials, and audiovisual online training methods for improving FSA operations--*

- requesting that the contracting officer procure group training with the training offices' assistance.

E   Video* * * Training Responsibilities

HRD, TDB shall:

- coordinate the development and production of FSA training videos * * *
- monitor the quality of nationally released FSA training videos * * *
- assist other units with planning and implementing training videos * * *.

2   HRD Responsibilities (Continued)

F   Responsibilities to Field Offices

HRD, TDB's Field Office responsibilities include:

- assisting Field Office training specialists in carrying out their responsibilities

- arranging and conducting national training courses for Field Office personnel

- *--assisting Field Offices in implementing the AgLearn Learning Management System within their offices and authorizing exceptions to this handbook because of implementing AgLearn--*

- visiting Field Offices, as necessary, to:

    - review progress and assist in planning training programs
    - evaluate results of employee development and training programs

- *--using field resource personnel, such as detailing CED's, program technicians, or DD's--* to assist in developing training guides and training materials and to serve as instructors

    Note: State Offices may use these individuals to assist with Statewide training programs.

- *--assisting State Offices in arranging State-wide training programs for program technicians.--*

--3   HRD, KCHRO, Employee Development Section Responsibilities--

A   Overall Responsibilities

 *--HRD, KCHRO, Employee Development Section is responsible for program and operational planning as it involves employee development and training for APFO, KCCO, Kansas City, St. Louis, and State Offices.

B   Specific Responsibilities

HRD, KCHRO, Employee Development Section is responsible for:**--***

- providing staff guidance

- developing, conducting, and evaluating training programs for State and Field Office employees

- identifying employee training needs

- assisting State Training Coordinators in carrying out their responsibilities

- ***--**processing training requests and inputting information into AgLearn**--***

- maintaining required records on training

- establishing and maintaining a training resource library for Kansas City, St. Louis, and the Field Offices

- requesting that the contracting officer procure group training with the training offices' assistance

- evaluating results from employee development and training programs

- visiting State Offices, as necessary, to:

  - review progress and assist in planning training programs
  - assist in delivering training
  - evaluate results of training programs.

*--4   DAFO Responsibilities

A   Specific Responsibilities

DAFO shall:**--***

- orient STC's and SED's

- assist HRD, TDB in establishing and coordinating multi-State training programs, when appropriate

- recommend candidates for National Training Task Forces as required

- ensure that State Offices have a training coordinator

- recommend State or County Office employees to serve as instructors

* * *

- assist HRD *** * *** in providing adequate program training for State Office agricultural program specialists.

5   State Office Responsibilities

   A   STC Responsibilities

   STC shall provide program administration by:

   • setting State training policy, within national guidelines

   • establishing employee development and training

   • providing leadership and guidance, with SED, for employee development and training programs within the State

   • conducting a basic orientation and training course, using the nationally developed course for new COC members, alternates, and advisors as soon as possible after election

   • establishing the March 30 deadline for County Offices to prepare PE-175R, COC Orientation and Training, reporting the status of the basic orientation and training course to the State Office

      Note: Negative reports are required. Indicate whether training was not completed or if there were no new COC members, alternates, or advisors.

   •***--**reporting the status of the orientation training to DAFO by April 15**--***

   • evaluating results of employee development and training programs

   • selecting candidates for COT program to ensure placement of highly qualified employees in vacant CED positions

   • certifying COT's qualifications for placement after trainee has successfully completed prescribed course of training

   • terminating COT's FSA services if progress is unsatisfactory

   • coordinating the Civil Rights Training Program.

5   State Office Responsibilities (Continued)

   B   SED Responsibilities

   SED's shall:

   - provide leadership in overall employee development, training, and staff planning

   - designate State training coordinator/specialist

   - ***--**designate State AgLearn administrator and backup**--***

   - ensure that the AgLearn system is used by employees and training coordinators and that duplicative processes in recording, authorizing, or approving training are eliminated

   - appoint a State training committee (optional), no longer a mandatory requirement

   - ***--**ensure that IDP has been completed for all permanent full-time Federal and**--*** non-Federal County Office employees and COT's

   - request any necessary training reports

   - evaluate results of employee development and training programs

   - after STC has certified that the trainee is qualified, have jurisdiction over a trainee who is not appointed to a regular CED job. Assign the trainee to responsible, productive duties that will further the training and qualifications of that trainee for a CED position.

5   State Office Responsibilities (Continued)

C   State Agricultural Program Specialist Responsibilities

State Office agricultural program specialists **may** be required to:

- prepare applicable program training materials for COT's * * *, including training course outline

- plan and conduct training meetings and workshops to provide program knowledge, skills, and abilities essential for State and County employees

- visit County Offices to assist in developing, conducting, and evaluating training.

D   DD Responsibilities

DD's shall:

- promote and coordinate COC * * * and employee development and training programs in the district

- assist * * * CED's in carrying out * * * employee development and training responsibilities

- act as training liaison between State and County Offices.

5   State Office Responsibilities (Continued)

   E   State Training Coordinators Responsibilities

   State Training Coordinators are responsible to the unit head. State Training Coordinators
   shall ensure that the employee development and training programs meet FSA's training
   objectives and provide assistance as follows:

   - assist supervisors and employees in preparing FSA-600's

   - use AgLearn to setup, approve, monitor, and report all employee training activities

   - *--develop COT and conduct understudy programs--*

   - plan, schedule, and supervise trainees and understudies

   - evaluate the results of employee development and training programs

   - use appropriate outside training courses

   - plan and conduct training meetings and develop training materials

   - supervise operation of training facilities

   - establish and maintain a training resource library

   - research, develop, and distribute needed training materials, such as:

     - audiovisual aids
     - agenda
     - handout material
     - course outlines
     - lesson plans

   - plan and conduct training meetings, including providing instructor training for employees
     who conduct training programs

5   State Office Responsibilities (Continued)

   E   State Training Coordinators Responsibilities (Continued)

   •   establish quality control of training meetings to ensure acceptable results

   •   use qualified outside instructors in training courses if they can contribute useful and practical learning experiences not available through in-house programs

   •   prepare and maintain training forms, records, and reports

   •   visit County Offices, as necessary, to:

      •   review progress and assist in planning training programs
      •   assist in delivering training
      •   evaluate results of employee development and training programs.

6   Staff Planning and Training Responsibilities

A   Unit Head Responsibilities

Unit heads shall:

- provide leadership in overall employee development, training, and staff planning

- ensure that the appropriate training office approves training activities, training videos, or both

- encourage and ensure that all interested employees are offered an opportunity for training that will improve individual and organizational performance and assist in achieving the Agency's mission and performance goals

- designate training coordinator/contact and appoint members to training committees

- ***--**ensure that:

  - FSA-600 is prepared for each employee required to have an IDP
  - each employee receives a copy
  - the supervisor obtains a copy**--***

- evaluate results of employee development and training programs.

6   Staff Planning and Training Responsibilities (Continued)

   B   Immediate Supervisor's Responsibilities

   Immediate supervisors shall:

   • assist employees in their development and training

   • encourage and ensure that all interested employees are offered an opportunity for training that will improve individual and organizational performance and assist in achieving the FSA's mission and performance goals

   ●*--prepare IDP for all permanent full-time Federal and non-Federal County Office employees and COT's

   • use IDP to:--*

      • identify training needs and career goals with employees at regular intervals and annually during the performance evaluation review

      • provide recommended training

   • orient and train new employees

   • keep employees up-to-date on new or amended procedures, methods, and office activities

   • cross-train employees to provide back-up for other employees' jobs

   • evaluate and report on training activities in their units

   • encourage employees in self-development and professional improvement.

6   Staff Planning and Training Responsibilities (Continued)

C   Employee Responsibilities

Employees shall:

- *--complete all mandatory training, such as cyber security, privacy, civil rights, ethics, etc., with dates specified by USDA or FSA--*

- discuss training needs with supervisor

- *--prepare and submit IDP in AgLearn after discussion with supervisor--*

- request only training that will:

  - improve individual and organizational performance and assist in achieving the Agency's mission and performance goals

  - develop the knowledge, skills, and abilities that will enable employees to perform their official duties

- *--ensure e-mail address and supervisor are updated and maintained in AgLearn

- prepare and submit SF-182 through AgLearn (paragraph 35) with completed course registration forms or travel authorizations, if needed, to HRD, TDB for final approval at least 4 weeks before start of class--*

- complete training programs to the best of their ability

  Note: Employees must attain a grade of "C" or above in **academic** training. See paragraphs 36 and 119 for more details.

- be responsible for reviewing training history records in AgLearn

- be responsible for self-development

- *--be responsible for completing the activities listed on the approved IDP--*

- immediately notify training office of any course cancellations, substitutions, or date changes of courses.

7   National Office Responsibilities

A   Appointing Division or Staff Training Contact

The division or staff director shall:

- appoint the division or staff training contact, or both
- notify HRD, TDB of any contact changes.

B   Division or Staff Training Contact Responsibilities

The division or staff training contact shall:

- serve as the liaison between HRD, TDB and the division or staff director

- assist the division or staff director in carry out training and development responsibilities

- be directly responsible to division or staff director and submit periodic progress reports on training to division or staff director

- encourage employees who need training to participate in training and development activities

- gather information on training programs for the supervisor when it is determined that an employee needs training

- remind supervisors of the necessity and requirement to meet annually with employees to assess training needs

- ensure that course nominations, when requested, are submitted to HRD, TDB in a timely manner

  Note: Course nominations must be submitted 4 weeks before start date of class.

- advise employees on the selection of training courses and the availability of courses, dates, and locations

7   National Office Responsibilities (Continued)

   B   Division or Staff Training Contact Responsibilities (Continued)

   * * *

   • remind employees of scheduled training courses a week before the training date

   • call HRD, TDB about substitutions, date changes, or cancellations of courses

   • be familiar with this handbook

   * * *

   • provide HRD, TDB with feedback and suggestions for improving training and
     development.

8   Designating Training Coordinators/Contacts

A   Choosing Training Coordinators/ Contacts

When choosing training coordinators/contacts and back-up training coordinators/contacts, unit heads should designate employees with the aptitude for training administration. When a new coordinator/contact is designated or changed, notify HRD, TDB of designee's name and position title.

B   Designation

Training coordinators/contacts are designated according to this table.

Office	Training Coordinator/Contact Designation
National	• Administrator shall designate employees reporting to the Administrator. • Director shall designate employee within division or staff.
* * *	* * *
APFO	Director shall designate employee.
State	SED shall, with STC concurrence, designate employee.
County	CED is the training coordinator.

9-19 (Reserved)

Part 2   Training Facilities (Except Counties)

20   Overview

A   Introduction

This part includes information on ensuring that training facilities are available for all National and Field Offices employees.

B   Purpose

Training facilities provide a continuing opportunity for intense training programs. This space should:

- be a designated area, near the main office, that is:

  - accessible to all employees
  - free from office traffic and interruptions

- have sufficient tables, chairs, and audiovisual equipment necessary for effective training

- maintain a training resource library if possible

- meet accessibility standards set by USDA for persons with disabilities.

C   Training Aids

Each training facility should be equipped with the following training aids:

●***--**desktop or laptop computer

- DVD player or VHS video cassette recorder

- flip chart

- lavaliere or lectern microphone

- lectern

- LCD flat screen monitor or LCD projector for net meetings, webinars, PowerPoint presentations, and online training

- overhead projector

- projection screen.**--***

21   National Training Facilities

A   Introduction

National training facilities are located in Washington, DC, * * * and are maintained by HRD, TDB.

B   Availability and Scheduling

Any office may use the National training facilities.

- Priority is given to scheduled training meetings.

- Make reservations for these facilities with HRD, TDB at least 2 weeks in advance, if possible.

22   State Office Training Facilities (Except Counties)

  A   Establishing Training Facilities

  *--Each State Office is required to have a training facility unless STC, with DAFO approval,**--***
    determines that it is not feasible.

    If a facility is not established, arrange for space on an "as needed" basis.

    Acquire necessary training equipment for the training facility.

  B   Availability

    Any State or County Office may use the facility for training purposes. If the facility serves a
    dual function, scheduled training shall have priority.

  C   State Training Coordinator's Responsibilities

    The State Training Coordinator shall plan, organize, and assume responsibility for use of the
    training facility.

23   Kansas City and APFO Office Facilities (Except Counties)

   A KCAO Responsibilities

 *--Director, KCAO shall establish a training facility for Kansas City Offices. HRD, KCHRO, Employee Development Section is responsible for maintaining and operating the training**--*** facility.

   B APFO Responsibilities

   Director, APFO shall establish and maintain training facility for APFO employees.

   C Availability

   Units in any FSA office may use these training facilities for training purposes, subject to scheduling clearance with the appropriate office responsible for its operation.

24 Training Resource Libraries (Except Counties)

A
Purpose   Each training office shall maintain a training resource library to provide
                               employees additional opportunities for professional and self-development.

B
Location   Training resource libraries should be near the unit's training facility. State Offices
                               shall provide materials, equipment, or both, as needed for training in County
                               Offices.

C
Authority   Offices responsible for establishing and maintaining a training resource library are
                               authorized to purchase needed books, materials, and equipment within budgetary
                               limitations.

D
Materials To Be   Training resource libraries shall maintain audio, videotapes, books, articles,
Maintained   *--pamphlets, internet access sites, and other training aids on areas covering:--*

- customer service
- training techniques
- management
- communications
- supervision
- Civil Rights
- career planning
- PC software packages used in FSA
- sign language
- job search
- career resources
- resume writing
- other related subjects.

E
Operation   Libraries shall maintain a system of:

- cataloging
- maintenance
- control for checkouts and returns for training aids and training materials.

25 Career Development Center (National Office Only)

A
Introduction

The Career Development Center is a one-stop, comprehensive development facility that provides a variety of activities and services to National Office employees at all stages of their careers.

B
Career
Development
Center Goals

The Career Development Center's goals are to:

- provide confidential career counseling, development, and advice to assist employees in identifying training, professional, and personal development opportunities

- provide training resources

- provide information and training to supervisors, managers, and employees on career-related topics, that is, IDP's, preparing resumes, interviewing techniques, etc.

- provide referral services

- administer tools for assessing and diagnosing skills, career interests, etc.

- develop and coordinate workshops and other learning opportunities.

25 Career Development Center (National Office Only) (Continued)

C
Developmental
Services

HRD, TDB will provide services through using the following:

- confidential career counseling services
- resource library (video, audio, handouts, job aids, etc.)
- multimedia laboratory
- tutorials
- referral services
- self-assessment instruments
- computer software applications
- personal assistance.

D
Who Can Use the
Center

All National Office employees are eligible to use the Career Development Center.

26-34 (Reserved)

--Part 3   Requesting, Approving, and Verifying Training--

35   Overview

A   Introduction

 *--This part includes information on requesting, approving, and verifying training.**--***

B   Approval for Training

All training **must be approved** by the appropriate training office before:

* registration
* enrollment
* course date.

C   Criteria for Approving Training

FSA may pay for training that:

* is approved by unit head

* is designed to correct deficiencies

* improves the level of performance

* develops skills basic to performance

* is required by law

* helps employees in keeping abreast of scientific, professional, technical, mechanical, trade, clerical, fiscal, administrative, or other fields which will improve individual and organizational performance and assist in achieving the Agency's mission and performance goals

* develops the knowledge, skills, and abilities that will enable employees to perform their official duties

* is approved as part of a career enhancement or career development program

* has funding available.

35 Overview (Continued)

D Disapproving Training

FSA will **not** pay for training that is:

- not approved before the training begins

 *--**Note:** Training is approved when SF-182 is approved by the AgLearn final approver
(subparagraph 37 A).**--***

- of a personal nature, such as:

  - career testing
  - personal aptitude evaluation

- for the sole purpose of providing an opportunity to an employee to obtain a college or
university degree or other professional certification, such as either of the following:

  - certified public accountant
  - membership in an occupationally related society or group.

E Additional Restrictions on Approving Training

FSA may **not** pay for training that:

- does not meet identified needs for knowledge, skills, and abilities bearing directly upon
the performance of official duties

- the training course contains elements likely to induce high levels of emotional response
or psychological stress in some participants

- the training course contains any methods or content associated with religious or
quasi-religious belief systems or "new age" belief systems as defined in EEOC Notice
N-915.022, dated September 2, 1988

- is offensive to, or designed to change, participants' personal values or lifestyle outside
the workplace

- the training course includes content related to human immunodeficiency virus/acquired
immune deficiency syndrome (HIV/AIDS) other than that necessary to make employees
more aware of the medical ramifications of HIV/AIDS and the workplace rights of
HIV-positive employees.

35   Overview (Continued)

F   Submitting Requests

All training requiring expenditure of funds or requiring official time other than for required training shall be requested and approved using SF-182. An SF-182 is **not** needed for:

- catalog courses requested/registered through AgLearn (except for Graduate School, USDA courses)

- internal FSA required training for which attendance is verified using a sign-in sheet and recorded in AgLearn training history.

Note: If the training is recorded in AgLearn and SF-182 is **not** used for payment, no SF-182 is needed.

Office	Action
National Office	Employees shall: - submit SF-182 in AgLearn - FAX any related forms, such as AD-202, registration form, justification, etc., to 202-205-9048.

*--Kansas City and St. Louis	Employees shall:
	
	- submit SF-182 in AgLearn
	
	- forward any related forms, such as AD-202, registration form, justification, etc., by either of the following:
	
	   - FAX to 816-926-1825
	   - mail to Mail Stop 8398.**--***

All other offices	Submit SF-182 in AgLearn.

 *--Note: Training requests should be received by the appropriate training office **at least--*** **4 weeks before** course start date.

G   Using SF-182

Use SF-182 to request, authorize, certify, and record an employee's formalized training and education when:

- training is conducted through FSA, other USDA agencies, Government agencies, or non-Government training vendors

- an exchange of funds or official time is involved.

35   Overview (Continued)

H   Acceptance by Training Vendor

Approval of SF-182 does not constitute acceptance in a course. The training vendor may notify employee of acceptance before the course begins.

I   Training Records

 *--All training offices must maintain accurate records in AgLearn of all training completed or not completed.

J   AgLearn Learning Management System

The following offices shall update and maintain the AgLearn system:

- HRD, TDB for all employees serviced by the National Office and other special courses coordinated by HRD

- HRD, KCHRO, Employee Development Section for all employees serviced by KCHRO that includes APFO, KCCO, KCFO, KC-ITSD, St. Louis, and State Office employees

- State Offices for all State and county employees serviced.

Chief, TDB, HRD and Chief, KCHRO, Employee Development Section, HRD shall ensure that records are maintained by assigning a training specialist to:

- monitor input and operations to AgLearn--*
- provide necessary information to unit or other offices or officials.

35   Overview (Continued)

K   Certificate of Training

 --A certificate may be provided to each employee completing FSA-conducted or--
    FSA-sponsored training, if the vendor does not provide one. Use AD-284A or other training
    certificate. Ensure that the certificate indicates the number of hours the training course
    represents.

    This is an example of AD-284A.
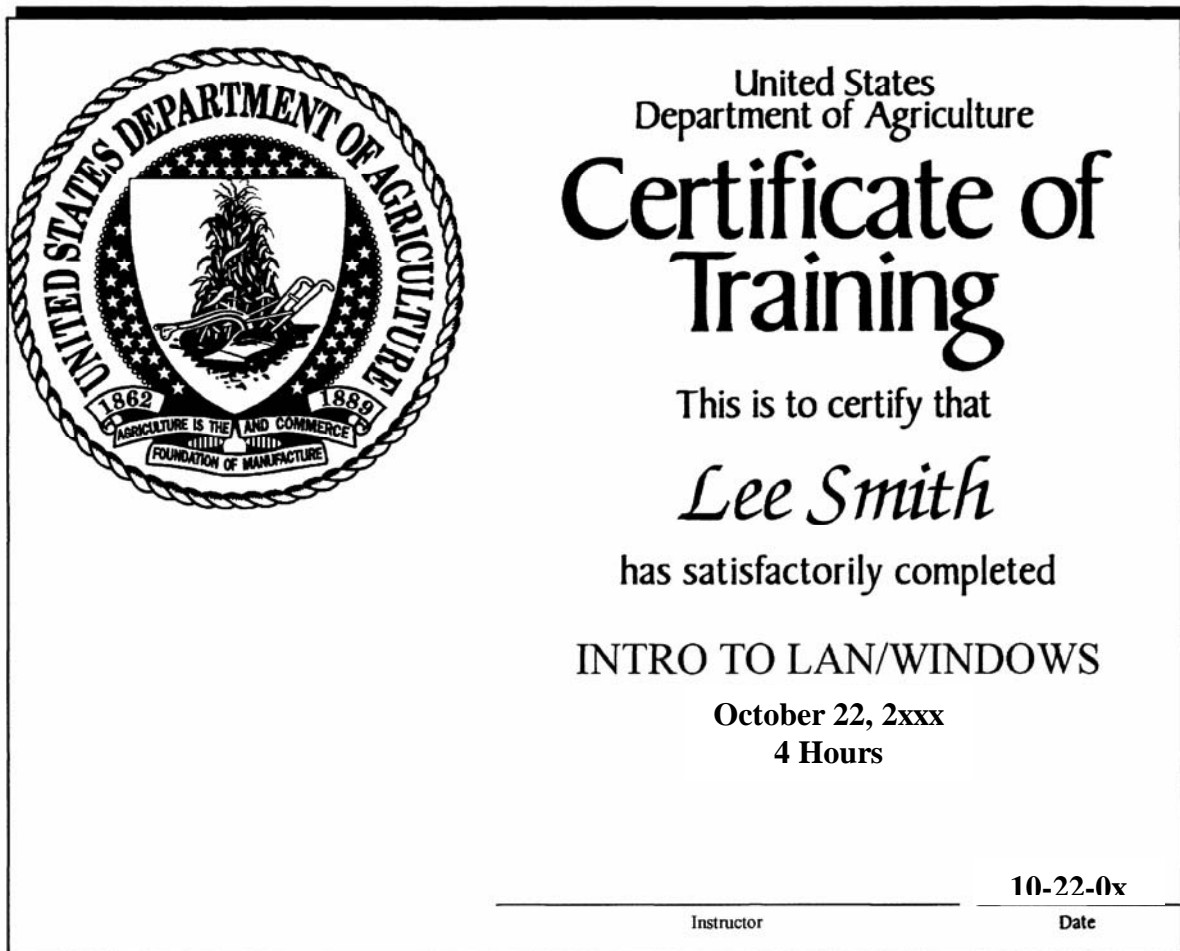
36   Authorized Training Expenses

A   Introduction

FSA pays full or partial cost, as permitted by law, for employees selected for training under the Government Employees Training Act and other training authorities.

B   Salary

Employees shall be kept on full salary during the period of training.

C   Tuition and Fees

FSA may pay or share tuition and related costs with employees for:

●***--**approved outside short-term regular and correspondence or online training courses**--***

● no more than 2 courses per semester for approved academic training, if a grade of "C" or above is achieved.

D   Course Not Completed or Required Grade Not Achieved

An employee who fails to complete a course or receives a grade of less than "C" shall reimburse FSA for the cost of the course including books and materials, unless a waiver is granted by the Director, HRD.

An employee who receives a grade below "C" will not be approved for academic training for 1 year following the completion date of the course.

E   Travel Expenses

Employees may be reimbursed for travel to and from local short-term training sessions during duty hours if additional costs incurred are above those normally paid by employee
 --**traveling to and from official duty station in accordance with Agency local travel policy.**--

No travel or parking expenses will be paid for employees attending:

● local vendor training during off-duty hours

● schools, colleges, or universities during off-duty hours.

   Note: This includes career enhancement participants attending local schools.

36   Authorized Training Expenses (Continued)

    F   Travel Reimbursements (National Office Only)

        Reimburse travel expenses for attending a training course according to this table.

IF training course is...	THEN...
local	•*--complete SF-182, blocks C.2a through C.2c according to subparagraph 38 A--*
	• upon completion of training, submit copy of SF-182 with SF-1164 according to 97-FI (for out-of-pocket expenditures when it was not possible to claim the expenditure on AD-616) to appropriate office.
outside local duty station	•*--complete SF-182, blocks C.2a through C.2c according to subparagraph 38 A--*
	• submit copy of approved travel authorization with SF-182 to HRD.

    G   Per Diem

        When the training site is located outside of the employee's official duty station, pay per diem and travel expenses according to travel regulations.

* * *

*--37 Approving SF-182's in Ag Learn

A AgLearn Final Approver for SF-182, Section C, Item C.1c

The following officials are delegated authority to approve or disapprove training costing $3,000 (SF-182, item C.1c) or less per employee according to this table.

IF the employee is...	THEN approving official is the...
a National Office employee	Chief, TDB, HRD or designee.
a Kansas City/St. Louis Office employee below the director level	Chief, KCHRO, Employee Development Section, HRD or designee.
an APFO employee below the director level	Director, APFO or designee.
an SED	DAFO.
a STC member	SED.
a State or County Office employee below SED and CED level	SED or designee.

Director, HRD or Chief, TDB, HRD has authority to approve or disapprove training that exceeds $3,000 per employee (SF-182, item C.1c).

Chief, KCHRO, Employment Development Section or designee has authority to approve or disapprove training that is $5,000 or less per Kansas City and St. Louis employee (SF-182, item C.1c).

B Method of Payment

After the SF-182 has been approved, the appropriate training office may use the government purchase card or convenience check to pay for the training in accordance with Departmental and Agency policies. The use of the government purchase card is the preferred method of payment up to the purchasers card limit. If the training is over the purchase card limit, the SF-182 should be used. See subparagraph 38 A, step 4, SF-182, item C.6 for billing instructions.

Notes: Employees should **never** pay for any training, training fees, or conference events out of their pocket expecting to be reimbursed.

The government travel card should **never** be used to pay for any training, training fees, or conference fees.

For questions about using the government purchase card contact Linda Worthington at 816-926-6216.**--***

*--38   Submitting SF-182's in AgLearn

A   Submitting AgLearn Requests

Employees should discuss and obtain verbal approval of proposed training with their
supervisor **before** submitting the request in AgLearn. Employees shall gather information
for all of the mandatory fields in Step 12 to ensure that **all** required information needed is
available to create the request in AgLearn. Employees shall submit SF-182 in AgLearn
according to this table.

Step	Action
1	Log into AgLearn at **http://www.aglearn.usda.gov**. Under "**Learner Center**", CLICK "**Learner Login**". On the Warning Screen, CLICK "**Continue**" to access the eAuthentication Login Screen. Enter the **user ID** and **password** and CLICK "**Login**".
2	Verify supervisor information Under the top menu bar, CLICK "**Profile**". Review the "**Supervisor**" field. If supervisor's name is: • correct, no action is required, continue to step 10 • **not** displayed or incorrect, continue to step 3.
3	To select the supervisor, CLICK "**Select**" on the right of the "**Supervisor**" field name. A Search Supervisor dialog box will be displayed.
4	Enter supervisor's last name in the "**Last Name**" field. **Note:** This is critical. Users **cannot** advance to the Selection Screen unless this field is complete.
5	If user's supervisor has a relatively common last name, enter supervisor's first name to limit the number of names that will be displayed.

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*--38   Submitting SF-182's in AgLearn (Continued)

    A   Submitting AgLearn Requests (Continued)

Step	Action
6	Verify that FSA is displayed in the "**Agency**" field and any relevant sub-agency information (such as FSA-STATES-VA, FSA-HQ) is displayed.
7	For a more precise search, enter supervisor's e-mail address in the "**Email**" field. **Note:** Users can also search using only the supervisor's e-mail address and last name.
8	CLICK "**Search**" and select supervisor from the list that will be displayed. **Note:** Information such as e-mail address and duty station will be included to help when choosing a supervisor between similar names.
9	After selecting supervisor, CLICK "**Apply Changes**" at the top or bottom of the Profile Screen.
10	Verify e-mail address under the top menu bar, CLICK "**Profile**". Scroll down and verify the "**Email Address**" If: • correct, no action is required, continue to step 11 • blank or incorrect, **update** the field with the correct information and CLICK "**Apply Changes**" at the top or bottom of the Profile Screen.
11	At the AgLearn Welcome Screen, CLICK "**Learning**" on the top menu bar. At the submenu bar, CLICK "**SF-182 Requests**". The Request, Authorization, Agreement & Certification of Training will be displayed, CLICK "**New Request**". The Request, Authorization, Agreement & Certification of Training Screen will be redisplayed with fillable items.

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*--38   Submitting SF-182's in AgLearn (Continued)

   A   Submitting AgLearn Requests (Continued)

Step	Action
12	Enter SF-182 data as follows.

Note: Mandatory fields have no shading; optional and pre-populated fields are shaded. If pre-populated, verify information is correct.

Section A Trainee Information		
Item	**Description**	**Instructions**
A.	Agency Code, agency sub element, and submitting office number	ENTER "AG-FA".
B.	Request Status/Record Action	Defaulted to "Add".
A.1.	Applicant's Name	Pre-populated.
A.4.	Home Address	Optional field.
A.5.	Home Phone	Optional field.
A.6.	Position Level	CLICK **1** of the following. a. **Non-supervisory** - Anyone who does not have supervisory/team leader responsibilities. b. **Manager** - Those in management positions who typically supervise one or more supervisors. c. **Supervisory** - First line supervisors who do not supervise other supervisors; typically those who are responsible for an employee's performance appraisal or approval of their leave. d. **Executive** - Members of the Senior Executive Service (SES) or equivalent.
A.7.	Organizational Mailing Address	This is the FSA address for the employee. Enter agency, office, division, and branch; include the street name, city, State and ZIP code.
A.8.	Office Phone	Enter employee's area code, office telephone number, and extension.
A.9.	Work Email Address	Pre-populated.
A.10.	Position Title	Enter employee's current position.
A.11.	Does applicant need special accommodation?	If trainee needs special arrangements (brailing, taping, interpreters, facility accessibility, etc), describe the requirements in the space provided or on a separate sheet.
A.12.	Type of Appointment	Pre-populated.
A.13.	Education Level	Pre-populated.
A.14.	Pay Plan	Pre-populated.
A.15.	Series	Pre-populated.
A.16.	Grade	Pre-populated.
A.17.	Step	Enter the appropriate step (1-10).

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*--38   Submitting SF-182's in AgLearn (Continued)

    A   Submitting AgLearn Requests (Continued)

Step	Action		
12 (Cntd)	**Section B Training Course Information**		
	Item	**Description**	**Instructions**
	B.1.a.	Training Vendor Name	Select training vendor from the drop-down list. **Notes:** Vendors may not always be listed alphabetically. Scroll down through the list to find vendors that have recently been added to the list. If vendor is not listed, CLICK "**Other**". Enter vendor's name in "**If other, please specify**" block. If user finds several vendors with the same name, be sure to check the address fields.
		Mailing Address	Will auto-populate when training vendor is selected. If vendor not listed, enter street address.
		City	If not auto-populated, enter city of training vendor.
		State/Province	If not auto-populated, enter State of training vendor.
		Postal Code	If not auto-populated, enter postal code of training vendor.
		Country	If not auto-populated, enter country of training vendor.
	B.1.b.	Location of Training Site	Provide Street address of the training site if different from B.1a. If same as training vendor's street address, CLICK "**If same, mark box**".
	B.1.c.	Vendor Email Address	Enter vendor's e-mail address.
	B.1.d.	Vendor Telephone Number	Enter vendor's telephone number.

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*--38   Submitting SF-182's in AgLearn (Continued)

    A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section B Training Course Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	B.2a.	Course Title	Enter title of the course or the program that the trainee is scheduled to complete.
	B.2b.	Course Number Code	Enter course number code.
	B.3.	Training Start Date	Enter start date of the training to be completed by the trainee using the calendar icon.
	B.4.	Training Complete Date	Enter end date of the training to be completed by the trainee using the calendar icon.
	B.5.	Training Duty Hours	Enter number of duty hours for training.
	B.6.	Training Non-Duty Hours	Enter number of nonduty hours for training.
	B.7.	Training Purpose Type	Select 1 of the following from the drop-down list. **01: Program/Mission -** Training to provide the knowledge, skills, and abilities needed as a result of agency mission, policies, or procedures. **02: New Work Assignment -** Training to acquire the knowledge, skills, and abilities needed because of assignment to new duties and responsibilities when such training is not part of a planned, career development program (such as training provided to a staffing specialist who has been newly assigned to a position involving classification duties). **03: Improve/Maintain Present Performance -** Training to provide the knowledge, skills, and abilities needed to improve or maintain proficiency in present job. **04: Future Staffing Needs -** Training to provide the knowledge, skills, and abilities needed to meet future staffing needs (such as to implement succession planning). **05: Develop Unavailable Skills -** Training to acquire the knowledge, skills, and abilities needed for fields of work for which the labor market cannot produce a sufficient number of trained candidates (such as air traffic controllers or Information Technology professionals). **06: Retention -** Training/education used to address staffing issue of retaining an employee (such as academic degree training).

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*--38   Submitting SF-182's in AgLearn (Continued)

A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section B Training Course Information (Continued))**		
(Cntd)	**Item**	**Description**	**Instructions**
		Training Type Code	**Hidden Field** – Determined by B.9 selection.
	B.9.	Training Sub Type Code	Select 1 of the following from the drop-down list. **01_01: Legal -** Education or training in concepts, principles, theories, or techniques of law **01_02: Medical & Health -** Education or training in concepts, principles, theories, or techniques of medicine. **01_03: Scientific -** Education or training in concepts, principles, theories, or techniques of disciplines such as the physical, biological, natural, and social sciences; education; economics; mathematics; or statistics. **01_04: Engineering & Architecture -** Education or training in concepts, principles, theories, or techniques of disciplines such as architecture and engineering. **01_05: Human Resources -** Education or training in the concepts, principles, and theories of such fields as public administration, personnel training, EEO, human resources policy analysis, succession planning, performance management, classification, or staffing. **01_06: Budget/Finance -** Education or training in concepts, principles, or theories of business administration, accounts payable and receivable, auditing and internal control, or cash management. **01_07: Planning & Analysis -** Education or training in concepts, principles, or theories of systems analysis; policy, program or management analysis; or planning, including strategic planning.

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A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section B Training Course Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	B.9. (Cntd)	Training Sub Type Code (Continued)	**01_08: Information Technology -** Education and training in concepts and application of data and the processing thereof; such as the automatic acquisition, storage, manipulation (including transformation), management, system analysis, movement, control, display, switching, interchange, transmission or reception of data, computer security and developing and using hardware, software, firmware, and procedures associated with this processing. This training type does **not** include any Information Technology training on FSA proprietary systems. **01_09: Project Management -** Education and training in concepts, principles, or theories necessary to develop, modify, or enhance a product, service, or system that is constrained by the relationships among scope, resources, and time. **01_10: Acquisition -** Education or training in concepts, principles, theories, or techniques related to the 1102 occupation, such as procurement and contracting. **01_11: Logistic Specialty** - Training for professional skills of a specialized nature in the methods and techniques of such fields as supply, procurement, transportation, or air traffic control. **01_12: Security -** Training of a specialized nature in the methods and techniques of investigation, physical security, personal security, and police science. **01_13: Clerical -** Non-supervisory clerical/administrative training in skills such as office management, typing, shorthand, computer operating, letter writing, telephone techniques, or word processing.

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*--38   Submitting SF-182's in AgLearn (Continued)

A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section B Training Course Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	B.9. (Cntd)	Training Sub Type Code (Continued)	**Training Programs -** **01_14: Trade & Craft -** Training in the knowledge, skills, and abilities needed in such fields as electronic equipment installation, maintenance, or repair; tool and die making; welding, and carpentry. **01_15: Foreign Affairs -** Training for professional skills of a specialized nature in the methods and techniques of such fields as foreign languages, foreign culture, diplomacy, or strategic studies. **01_16: Leadership** - Training that addresses skill areas such as leadership/management and communication such as written, oral, and interpersonal coursework. **Development -** (Formal Developmental Training Programs **02_20: Presupervisory Program -** Development/ training program for non-supervisors. **02_21: Supervisory Program -** Development/training program that provides supervisory principles and techniques in such subjects as personnel policies and practices, including EEO, merit promotion, and labor relations; human behavior and motivation; communication processes in supervision, work planning, scheduling, and review; and performance evaluation for first-line supervisors. **02_22: Management Program -** Development/training program that provides mid-management level education or training in concepts, principles, and theories of such subject matters as public policy formulation and implementation, management principles and practices, quantitative approaches to management, or management planning organizing and controlling. (Supervisors of supervisors; GS-14/15 supervisors; GS-14/15 direct reports to SES).

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*--38   Submitting SF-182's in AgLearn (Continued)

A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section B Training Course Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	B.9. (Cntd)	Training Sub Type Code (Continued)	**02_23: Leadership Development -** Formal developmental program that provides leadership training and development opportunities. **02_24: SES Candidate Development -** OPM-approved program to prepare potential SES members. **02_25: Executive Development -** Continuing development for leaders above the GS-15 level. **02_26: Mentoring Program -** Formal stand-alone program with established goals and measured outcomes. Open to all who qualify; protégées and mentors paired to facilitate compatibility; training and support provided. **02_27: Coaching Program -** Formal stand-alone program that provides ongoing partnership with an employee and coach that helps employee produce desired results in professional life. **Basic Training -** (Fundamental and/or Required Training Programs) **03_30: Employee Orientation -** General training to provide an understanding of the organization and missions of the Federal Government, FSA, or activity, or a broad overview and understanding of matters of public policy. **03_31: Adult Basic Education -** Education or training to provide basic completeness in such subjects as remedial reading, grammar, arithmetic, lip reading, or Braille. **03_32: Mandated Training -** Federally mandatory training for all employees Govermentwide. This includes training mandated by Federal statute or regulation; such as in the areas of computer security awareness (5 CFR 930.301-305), ethics (5 CFR 2638.703 and 704), or executives, managers, and supervisors (5 CFR Part 412). **03_33: Work-life -** Training to promote work-life, such as health and wellness training, employee retirement/benefits training, etc.

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*--38   Submitting SF-182's in AgLearn (Continued)

    A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section B Training Course Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	B.9. (Cntd)	Training Sub Type Code (Continued)	**03_34: Soft Skills -** Training involving development of employee's ability to relate to others (e.g., customer service, dealing with difficult people, etc). **03_35: Agency Specific -** FSA specific training required by FSA and provided to Federal employees to achieve the goals and objectives of FSA, as needed; such as FSA training based on Inspector General's Audit; FSA training aimed at improving individual's needs based on PIP; FSA training based on signing agreement between Union and management. **03_36: Basic Computer Training**
	B.10.	Training Delivery Type Code	Select 1 of the following from the drop-down list: 01 – Traditional Classroom 02 – On the Job 03 – Technology Based 04 –Conference/Workshop 05 - Blended 06 – Correspondence.
	B.11.	Training Designation Type Code	Select 1 of the following from the drop-down list: 01 – Undergraduate Credit 02 – Graduate Credit 03 – Continuing Education Unit 04 –Post Graduate Credit 05 – Not Applicable.
	B.12.	Training Credit	Amount of academic credit hours of continued education units (.75, 1, or 1.5) earned by the employee for the completed training.
	B.13.	Training Credit Type Code	Select 1 of the following from the drop-down list: 01 – Semester Hours 02 – Quarter Hours 03 – Continuing Education Unit 04 – Not Applicable.

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*--38   Submitting SF-182's in AgLearn (Continued)

A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section B Training Course Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	B.14.	Training Accreditation Indicator	CLICK "**Yes**" or "**No**" to indicate whether the training course offers accreditation.
	B.15.	Continued Service Agreement Required Indicator	CLICK "**Yes**", "**No**", or "**N/A**" to indicate whether a continued service agreement is required for the training (see subparagraph 118 C).
	B.16.	Continued Service Agreement Required Expiration Date	If users CLICK "**Y**" in item B.15., enter expiration date (see subparagraph 118 C).
	B.17.	Training Source Type Code:	Select 1 of the following from the drop-down list. **01: Government Internal -** Training provided by a Federal department, agency, or independent establishment for its own employees. **02: Government External -** Training provided by an interagency training activity, or a Federal department, agency, or independent establishment other than where trainee is currently employed. **03: Non-government -** Sources include commercial or industrial concern, educational institutions, professional societies or associations, or consultants or individuals who are not Government employees, but are contracted to develop and/or provide training course or program. **04: Government State/Local -** Training provided by a State, county, or municipal Government. Education provided by State-operated or other public educational institutions is reported as non-Government. **05: Foreign Governments and Organizations -** Training provided by non-U.S. entities that may or may not be outside the U.S.
	B.18.	Training Objectives	Provide text to explain how the training event meets agency objectives and purpose type.
	B.19.	Agency Use Only	Leave blank.

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A Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section C Training Cost Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	C.1.	Direct Cost and appropriation/ fund chargeable	**Amount -** Enter the following data: a. **Training -** Insert the actual/final cost of training tuition and fees for training completed by the employee that was paid for by the Federal Government. b. **Books and Materials -** Enter the materials cost for training completed by the trainee that was paid for by the Federal Government. c. **Total -** The total cost is system-generated after the training, fees, books, and materials costs are entered.
			Appropriation Fund - Enter the proper budget and accounting codes according to FSA policy.
			IF… / **THEN enter 98-FI appropriation/fund codes from as "ABBCCCCDDEEEE", as follows…**
			County Office Non-Federal Employees • "A", enter last digit of FY when the training course begins • "B", ENTER "**87**" only • "C", enter employee's budget organization code according to 98-FI, Exhibit 13 • "D", enter the sub object code • "E", enter the project number code according to 98-FI.
			All Other Employees • "A", enter the last digit of current FY • "B", ENTER "**84**" only • "C", enter the employee's budget organization code • "D", enter the sub object code • "E", enter the project code.

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*--38   Submitting SF-182's in AgLearn (Continued)

   A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section C Training Cost Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	C.2.	Indirect Cost and appropriation/fund chargeable	**Amount -** Enter the following data: a. **Training Travel Cost -** Insert the actual/final travel cost excluding per diem for training completed by the employee that was paid for by the Federal Government. b. **Training Per Diem Cost -** Insert the actual/final per diem cost (e.g., meals, lodging, miscellaneous expenses) for training completed by the employee that was paid for by the Federal Government. c. **Total Cost -** The total cost is system generated after the Travel and Per Diem costs are entered.
			Appropriation Fund - Leave blank.

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   A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section C Training Cost Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	C.4.	Document/ Purchase Order/ Requisition No	Enter the Document/Purchase Order/Requisition Number for reimbursement of training costs to the training vendor. This number is to be referenced in the billing process.
			IF… / **THEN…**
			National Office, Kansas City, or St. Louis employee — Leave blank.
			County Office non-Federal employee — enter 10-digit training order number, assigned by the County Office, as follows: • first 2 digits correspond to FY of the course start date • next 5 digits are the employee's organization code according to 98-FI • last 3 digits should begin with "001" at the beginning of each FY and run consecutively, such as "002" and "003" for each training order. **Note:** Offices shall maintain a log of training order numbers assigned to prevent duplicating numbers.
			all other employees — enter 10-digit training order number assigned by the training coordinator, as follows: • first 2 digits correspond to FY of the course start date • next 5 digits are the employee's organization code according to 98-FI • last 3 digits should begin with "001" at the beginning of each FY and run consecutively, such as "002" and "003" for each training form. **Note:** Offices shall maintain a log of all training order numbers assigned to prevent duplicating numbers.

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*--38   Submitting SF-182's in AgLearn (Continued)

   A   Submitting AgLearn Requests (Continued)

Step	Action		
12	**Section C Training Cost Information (Continued)**		
(Cntd)	**Item**	**Description**	**Instructions**
	C.5.	8-Digit Station Symbol	ENTER, "**12-06-0000**".
	C.6.	Billing Instructions	**IF paid by…**	**THEN…**
			government purchase card	ENTER, "**Paid by government purchase card**".
			PCMS convenience check	enter office billing address.
			NFC with SF-182	ENTER, "**USDA, NFC Miscellaneous Payments Section PO BOX 60,000 NEW ORLEANS LA 70160-0001**".
13	Verify entered information is correct and CLICK **"Submit"**.		
14	On the Approval Submission Screen, CLICK **"Submit"**. A message will be displayed that the External Learning Course Request has been successfully submitted to the supervisor for approval or disapproval. **Note:** To check the status of the request, at the AgLearn Welcome Screen, CLICK "**Learning**" on the top menu bar. At the submenu bar, CLICK "**SF-182 Requests**".		

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*--38   Submitting SF-182's in AgLearn (Continued)

B   Employee's Immediate Supervisor Approval or Disapproval

The employee's immediate supervisor should follow the instructions in this table to approve or disapprove SF-182.

Step	Action
1	Log into AgLearn at **http://www.aglearn.usda.gov**. Under "**Learner Center**", CLICK "**Learner Login**". On the Warning Screen, CLICK "**Continue**" to access the eAuthentication Login Screen. Enter the **user ID** and **password** and CLICK "**Login**".
2	Under "**Alerts**", there may be user training approvals on which to act. At the submenu bar, CLICK "**Approvals**". There will be an "External Training Request" on which to act. To get more detailed information on the request, click the "**course title**". SF-182 will be displayed. To edit the request, CLICK "**Edit this request**". Make necessary changes and CLICK "**Apply Changes**". Review the changes and CLICK "**Back**".
3	Supervisors shall CLICK "**Approve**" or "**Deny**" to indicate approval or disapproval of the training request according to subparagraphs 35 B through E. CLICK "**Next**".
4	Enter the reason for the approval or disapproval and CLICK "**Next**".
5	CLICK "**Confirm**" to confirm the approval or disapproval. The message will be displayed, "the request has been successfully submitted to go to the next step in the Agency's approval process." For FSA, the next step is the appropriate training office.

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*--39   Verifying Training Completion

A   Accessing AgLearn to Verify Completion of Training

Two days after the training completion date has passed, the employee will need to go back into AgLearn to verify training completion for the training to move into the employee's "**Learning History**". Employees shall access AgLearn to verify training completion according to this table.

Step	Action
1	Log into AgLearn at **http://www.aglearn.usda.gov**. Under "**Learner Center**", CLICK "**Learner Login**". On the Warning Screen, CLICK "**Continue**" to access the eAuthentication Login Screen. Enter the **user ID** and **password** and CLICK "**Login**".
2	At the AgLearn Welcome Screen, CLICK "**Learning**" on the top menu bar. At the submenu bar, CLICK "**SF-182 Requests**". The Request, Authorization, Agreement & Certification of Training will be displayed.
3	Find the approved training course that was completed. Under the "**Pending Approval Actions**" column, CLICK "**Verify**" next to "**Pending Verification**". The Verification Screen. will be displayed.
4	Complete blocks 27 and 31. If the marked course was **not** completed or all sessions were **not** attended, explain why in the "**Comments**" block. If this is a college class, complete block 30. Verify block 28, 29, and 33 information is correct. If the information is **not** correct, make changes as necessary.
5	Verify entered information is correct and CLICK "**Submit**".
6	CLICK "**Submit**" on the next screen. A message will be displayed that the External Learning Course has been successfully verified and submitted to the supervisor for verification. To check the status of the request, CLICK "**SF-182 Requests**" tab.

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*--39 Verifying Training Completion (Continued)

B Employee's Immediate Supervisor Training Completion Verification

The employee's immediate supervisor should follow the instructions in this table to verify training completion.

Step	Action
1	Log into AgLearn at **http://www.aglearn.usda.gov**. Under "**Learner Center**", CLICK "**Learner Login**". On the Warning Screen, CLICK "**Continue**" to access the eAuthentication Login Screen. Enter the **user ID** and **password** and CLICK "**Login**".
2	Under "**Alerts**", CLICK "**You have User Training Approvals**". The Pending Reviews and Approvals Page will be displayed. If the "**External Training**" field is **not** open, CLICK the triangle to the left of "**External Training**". The "**External Training**" field will be displayed.
3	Find the line with the information for the employee's training. Click the "**course title**". The External Learning Request Details Screen will be displayed.
4	CLICK the triangle to the left of "**View Actual Verification**". The Verification Form completed by the employee will be displayed for review. CLICK "**Back**". Do **not** click the browser's "**Back**" button. The Pending Reviews and Approvals Screen will be displayed.
5	On the line for the training to be verified, CLICK "**Approve**" radio button and CLICK "**Next**". Add comments, as needed, such as; "employee did not pass course."
6	CLICK "**Next**" to confirm. CLICK "**Confirm**" for the course to move into the employee's "**Learning History**".

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C   Status Definitions for AgLearn SF-182 Requests

The following provides a list of statuses and definitions.

IF status is…	THEN…
Approved	the employee has either of the following: • not yet attended training; see Start Date • attended training; however, the employee and supervisor did not complete the verification process.
Denied	either of the following: • the supervisor, reviewer, or final approver denied the SF-182 request • SF-182 was not approved before the Start Date of the course, so the system automatically denied the request.
Submitted	SF-182 has been submitted by learner and is waiting for approval process.
Verification Denied	the supervisor denied the verification of SF-182.
Verification Withdrawn	the supervisor withdrew the verification of SF-182.
Verified	SF-182 is completely closed out and listed in employee's Learning History.
Withdrawn	employee, supervisor, reviewer, or approver has withdrawn the request.

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40   (Withdrawn--Amend. 10)

*--41 Distributing SF-182's

A SF-182 Distribution by Appropriate Training Office

The appropriate training office shall distribute SF-182 after SF-182 has been approved by the appropriate official.

B Distributing SF-182's After Approval

After approval of SF-182, print, make copies, and distribute SF-182 according to this table.

IF…	THEN copy…
National Office employee	1 shall be filed in SF-182 file.
	2 shall be sent to vendor or training institution, if needed.
	3, if paid by: • Government Purchase Card, shall be filed when reconciling cardholders account in PCMS according to FSA policies and instructions on using the government purchase card • NFC, shall be sent to NFC for payment.
APFO, KCCO, Kansas City, St. Louis, State or County Office Federal employee	1 shall be sent to vendor or training institution, if needed.
	2, if paid by: • Government Purchase Card, shall be filed when reconciling cardholders account in PCMS according to FSA policies and instructions on using the government purchase card • NFC, shall be sent to NFC for payment.
County Office non-Federal employee	1 shall be sent to vendor or training institution, if needed.
	2, if paid by: • Government Purchase Card, shall be filed when reconciling cardholders account in PCMS according to FSA policies and instructions on using the government purchase card • NFC, shall be sent to NFC for payment.

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42 **(Withdrawn--Amend. 10)**

43 **(Withdrawn--Amend. 16)**

44-53 (Reserved)

Part 4   Quality Control and Evaluation of Training Meetings

54 Overview

A
Introduction

This part includes information on:

- quality control
- evaluating training meetings.

55 Training Meetings

A
Quality Control

Unit heads, training coordinators, or other persons responsible for planning and conducting training meetings are responsible for quality control.

B
Selecting
Training
Facilities

Training offices are responsible for planning and selecting accessible training locations and facilities. Training shall be held at the most cost-effective location. Give consideration to travel expenses and lodging for participants.

Training offices shall ensure that discrimination does not result from using facilities that deny access by failing to reasonably accommodate people with disabilities.

C
Reviewing
Training Plans

Unit heads who plan and conduct training shall contact their training office to ensure that plans, materials, and presentations are reviewed before use.

56 Evaluation of Training

A
--Evaluation--
Policy

Evaluate all formal training * * *.

B
Developing
Evaluation Form

For FSA training programs:

- the office developing the program will be assisted by a training specialist who is responsible for developing an evaluation form

- managers or instructors may request additional information to be evaluated.

For interagency and non-Government training programs, use any of the following:

- SF-182 evaluation form
- vendor-supplied evaluation form
- training office-developed evaluation form for that program.

C
Items to Include
on Evaluation
Form

Include the following items on any evaluation form:

- examples of usefulness in participant's work
- quality of presentations
- quality of facilities
- suggestions for improvements
- effectiveness of instructor
- overall appraisal of program
- *--effectiveness of learning techniques.--*

   Example: Excellent, good, fair, or poor.

56 Evaluation of Training (Continued)

**D
Date for
Obtaining
Evaluation**

Request that participants complete an evaluation form on either or both of the following:

- on the last day of the training program; that is, before close of session
- within 30 days of course, using SF-182 evaluation form.

**E
Using Evaluation
Information**

Use the evaluation forms to:

- improve FSA training
- determine value of course for FSA employees.

57 Conferences and Meetings

A
*--Off-Site Conferences and Meetings

27-AS provides the requirements and approval authorities for scheduling and conducting off-site meetings, conferences, training sessions, and ceremonies.

29-AS will be amended to also include the requirements and approval authorities.**--***

* * *

B
Washington D.C. Government Meeting Space

The administrative contact for each FSA division has been provided with a list of USDA's conference rooms. Contact the meeting coordinators in MSD, Resource Coordination Staff if space is not available or offices need space reserved for the following:

- Jefferson Auditorium
- South Building Cafeteria
- South Building Conference rooms 4960 and 5066
- Jamie L. Whitten Building Patio
- Reporters Building Conference rooms.

If meeting space is not available in the USDA complex and space is still required, provide the meeting requirements to Resource Coordination Staff so that space can be negotiated offsite.

* * *

58 (Withdrawn--Amend. 2)

59-67 (Reserved)

Part 5   Orientation Programs

68 Overview

**A
Introduction**   This part includes information on orientation programs.

**B
Policy**   Provide initial training of newly elected or appointed committee members and
employees to acquaint them with:

- FSA organization, history, background, responsibilities, and program
  philosophy

- responsibilities and functional relationships

- basic personnel and administrative policies and procedures

- civil rights.

**A
Immediate
Supervisor**   Immediate supervisor shall ensure that the following are provided to new employees:

- introduction to personnel in the unit

- description of available facilities and services

- discussion of office practices and rules

- basic employee benefits and obligations

- civil rights

- performance standards expected, and individual development and performance appraisal systems

- duties and responsibilities

- step-by-step instructions about performing assigned work.

69   New Employees (Continued)

B   Orientation Packet

When a new employee reports for duty, include the following in the orientation packet:
*--
- AD-349
- applicable pay scale
- CA-11
- FFAS-367
- flexible spending account information at **www.fasfeds.com**
- FSA organizational chart
- list of employees, telephone numbers, and office room numbers
- long term care insurance information at **www.ltcfeds.com**
- merit promotion plan booklet
- New Employee Orientation Guide and Checklist at **http://hr.ffas.usda.gov**
- RI-70-1
- RI-76-21
- SF-87
- SF-1152
- SF-2808
- SF-2809
- SF-2817
- SF-2823
- SF-3102
- Standards of Ethical Conduct Package (booklet, LRB memo, and enclosures)
- TSP BK-03
- TSP-1
- TSP-3
- Union Contract.

C   FFAS Orientation Web Site

A new employee orientation web site is available to all new employees at
http://hr.ffas.usda.gov. Click on "New Employee" tab at the bottom left side of the web
page.

This web site includes information to answer questions new employees may have about
working for the Federal Government. Some material is directly from USDA; much of it is
linked from other federal agencies.**--***

70   Field and State Executive Directors

A   Unit Head

Unit head shall discuss the following issues with employees immediately after they enter on duty:

- FSA organization and relationships with other Agencies
- lines of communication
- Director's responsibilities and authority
- FSA programs and the farmer committee system
- payroll, authorized travel, and other administrative requirements.

*--Note: Direct employee to review the FFAS online new employee orientation information at
http://hr.ffas.usda.gov. Click on "New Employee" tab at the bottom left side of the
web page.**--***

B   Additional Training for SED's

Provide additional training, as needed, for SED's in the following areas:

- recruiting, staffing and training responsibilities
- budgeting, administrative services and fiscal operations
- civil rights
- management, communications, and human relations.

C   National Orientation Course

New SED's shall attend The National Orientation Course in Washington, DC, as soon as
*--possible after appointment. DAFO is responsible for course implementation with assistance
from HRD.**--***

71   State Committee Members

*--A   DAFO Responsibilities

DAFO will discuss the following at an STC meeting when a new committee member is**--***
appointed:

- FSA organization and relationships with other agencies

- lines of communication

- committee system

- STC responsibilities and authority

- conducting effective STC meetings

- payroll, authorized travel and other administrative requirements

- civil rights

- background information on FSA programs available. Provide copies of background
  information statements (BI series).

B   National Orientation Course

New STC's shall attend The National Orientation Course in Washington, DC, as soon as
*--possible after appointment. DAFO is responsible for course implementation with assistance
from HRD.**--***

72-82 (Reserved)

83 Overview

A
Introduction   This part includes information on:

- training in present job
- cross-training
- temporary duty training
- job rotation training.

84 Training in Present Job

A
Purpose   On-the-job training programs prepare employees in regular work situations to better perform their assigned duties.

B
Responsibilities   Unit heads and immediate supervisors responsibilities are as follows.

- Unit heads shall conduct:

    - frequent staff meetings to keep members well informed of current activities

        Note: Weekly meetings are recommended.

    - meetings with all personnel as needed.

        Note: Quarterly meetings are recommended as a minimum.

- Immediate supervisors shall:

    - set clear work objectives with subordinates

    - establish agreement on what is to be done and when it is to be done

    - delegate responsibility and authority for work assignments

    - ensure that all subordinates understand and are skilled in work to be done, and arrange for training if needed

    - provide for frequent follow-up counseling and evaluation sessions to ensure that desired results are achieved.

85   Cross-Training

A Purpose

Cross-training prepares current employees to perform other jobs within the unit for the purpose of maintaining work output and ensures orderly operation during times when:

- employees have emergency absences, take planned leave, take training, or must perform other assignments

- the unit is experiencing peak workloads and is not adequately staffed to meet them.

B Advantages of Cross-Training

Cross-training will increase:

- the number of employees capable of performing duties assigned to the unit
- understanding and cooperation among employees.

C Responsibilities

Unit heads and supervisor's staff should continually provide adequate cross-training within their staffs.

86   Temporary Duty Training

A   Relocating to Achieve Specific Training

Relocate an employee to other units or locations for up to 6 months for training to accomplish 1 or more of the following:

- obtain additional experience valuable to present job

- learn a new job or operation

- participate in a study, survey, or project

- train employees in other units

- increase employee's ability to handle more responsible assignments

- increase employee's understanding of FSA operations, programs, administrative activities, and career opportunities.

B   Responsibilities

Supervisors shall determine need, select employees, and recommend training. This includes:

- working and discussing plans with other supervisors involved

    Note: These discussions may result in recommendations for a series of assignments or to train employees on assignments.

- ***--**contacting HRD, Domestic Operations Branch:**--***

    - to ensure that proper channels and rules are followed
    - if assistance is needed.

Note: **Some** details may require that competitive procedures are followed to ensure that all interested employees are offered an opportunity for special assignments that may lead to promotional opportunities.

86   Temporary Duty Training (Continued)

C   Selecting Employees

When selecting employees for temporary duty training, consider the:

- objectives that are expected to be accomplished
- employee's:

  - experience and previous training
  - ability to develop and benefit from training
  - interest in improving their performance.

D   Obtaining Approval

Submit written recommendations for approval according to this table.

WHEN recommending office is...	THEN approving official is...
a State Office	*--DAFO--*
a County Office	SED through DD.
*--APFO, KCCO, Kansas City, or St. Louis Office	Office head.--*
all other offices	Deputy Administrator, through channels.

87   Job Rotation Training

   A   Responsibilities and Use

   Unit heads should consider using job rotation as a means of training employees.

   - Job rotation may be either a lateral transfer or a promotion to another phase of operations.
   - Employee under job rotation training may be rotated within a 3- to 7-year period.

   B   Permanent Assignments

   The permanent assignment of an employee to another position in a different phase of FSA operations is for:

   - increasing the employee's knowledge and experience in FSA operations

   - strengthening units and staffs by providing them with employees who have a broad understanding of FSA operations.

   C   Approval

   Submit written recommendations for approval to personnel servicing office.

88-98 (Reserved)

Part 7   Individual Development Plans

99 Overview

**A
Introduction**

This part contains:

- information on using IDP's
- information on completing FSA-600
- examples of completed FSA-600's.

100   Using Individual Development Plan

**A
Introduction**

IDP's shall provide meaningful training plans that will enable employees to:

- perform duties according to established job standards
- improve job performance.

100   Using Individual Development Plan (Continued)

B
Who Needs to
Complete IDP's

IDP's are required for all:

- permanent full-time employees

  Note: For new permanent full-time employee, IDP is required 90 calendar days after the employee reports for duty.

- COT's.

IDP's are optional for all employees not listed in this subparagraph, including County Office non-Federal employees.

C
IDP
Considerations

IDP's should be formulated to include the following considerations:

- degree to which the employee possesses job-related knowledge, skills, and abilities

- relationship of the planned developmental activity to the knowledge, skills, and abilities required by the employee's present position.

D
Supervisors
Responsibility

Supervisors shall:

- be responsible for the development of their employees to achieve the knowledge, skills, and abilities according to their performance standards

- ensure that employees do not fail major assignments because of a knowledge or skill deficiency that could have been achieved through training

- along with employees, prepare FSA-600 annually at performance appraisal time for those individuals requiring IDP.

E
Employee
Responsibility

Employees are responsible for the initial implementation of IDP once it has been approved. This includes:

- completing training courses, if funds are available
- coordinating IDP plan with training contact
- scheduling workload and negotiating time priorities with their supervisor.

F
Reviewing or
Revising IDP's

IDP's should be reviewed, revised, or both as follows:

- at progress reviews of the performance plans
- upon completion of training
- altered as performance plans and job assignments change.

G
Training Office
Function

One copy of each approved IDP shall be submitted to the appropriate training office. The training office will:

- tabulate and summarize responses
- determine the need for group training programs
- provide assistance to training coordinators in understanding the IDP process.

---

101   Completing FSA-600, Individual Development Plan

A
Completing   Complete FSA-600 according to this table.
FSA-600

          Note: See subparagraph B for 2 completed FSA-600's.

Item	Action
1	Enter employee's full name (last, first, and middle initial).
2	Enter employee's office/division and office location.
3	Enter page number and total number of FSA-600 sheets.
4	Enter employee's pay plan, series, and grade.
5	Enter employee's position title.
6	Enter FY.
7	If no further development is desired or required at this time, mark the box and skip to item 14.
8	• Review career goals. • Identify knowledge, skills, abilities, and training or developmental experiences needed to attain goals.
9	Describe briefly the developmental activities that are needed to meet the developmental objectives. • Include mandatory training needed by the employee, such as 40 hours of supervisory training, civil rights, or ethics. • Conduct training.

A
Completing
FSA-600
(Continued)

Item	Action
10	Describe how the development will be accomplished, such as on-the-job training, detail, special assignment, formal classroom, or self-development.
	Enter an explanation of what will be included if on-the-job training, details, or special assignments are used.
	If training will be accomplished through formal instruction, identify the institution where it will occur, such as OPM, community college, supervisor's office or in-house, etc.
11	Show costs of formal training, if known, or use best estimate. Supervisors are responsible for budgeting costs, such as estimated tuition, per diem, travel, and supplies.
12 and 13	Show estimated month and year planned. Accomplishments should be recorded on a periodic basis and reviewed at least annually.
14	Get employee to sign and date after FSA-600 has been developed.
15 A and 15 B	Get supervisor to sign and date after the employee signs.
16, 17, and 18	Revise IDP to show significant changes in developmental needs. Changes will be initialed and dated in these blocks. Any changes to the original IDP, such as additions or deletions in training, rescheduling because of course cancellation or unavailability, or other reasons that denote the change on the original IDP, should be noted.

101 Completing FSA-600, Individual Development Plan (Continued)

B
Examples of
FSA-600

This is the first example of FSA-600.

FSA-600 (08-13-93)	U.S. DEPARTMENT OF AGRICULTURE Farm Service Agency **INDIVIDUAL DEVELOPMENT PLAN**	This program or activity will be conducted on a nondiscriminatory basis without regard to race, color, religion, national origin, age, sex, marital status, or disability.

1. NAME *(Last, First, Middle Initial)* Jones, Tammie L.	2. UNIT - LOCATION CEPD/Washington, DC	3. PAGE 1 OF 1
4. PAY PLAN/SERIES/GRADE GS-318-5	5. CURRENT POSITION Secretary	6. FISCAL YEAR 199X

7. No further development is desired or required at this time.　　Check Box here →　[ ]

8. DEVELOPMENT OBJECTIVES: KNOWLEDGE, SKILLS, ABILITIES	9. DEVELOPMENT ASSIGNMENTS	10. TRAINING: COURSES, SEMINARS, ROTATIONAL ASSIGNMENTS, ETC.	11. ESTIMATED COSTS	12. PLANNED	13. ACCOMP.
To improve skills in determining priorities and managing time.	Self-development activity	Read the following books: 1) How to Get Control of Your Time and Your Life (Alan Lakein) 2) The Time Trap	None	1/6-2/28/9X	
To improve ability in proofreading.	Correspondence course	Proofreading National Independent Study Center (OPM-NISC)	$85.00	3/9-5/29/9X	
To improve ability to compose non-technical correspondence.	Seminar/Workshop	Letterwriting for Secretaries OPM	$365.00	7/19-23/9X	
To improve skills in travel document preparation.	On-the-job training	Regular work sessions with division's administrative assistant to review and apply Government Travel Regulations.	None	2/28-7/30/9X	

14. EMPLOYEE SIGNATURE ☞ /s/ Tammie Jones	DATE 10/21/9X	15. A. SUPERVISOR'S SIGNATURE ☞ /s/ Phil Boss	DATE 10/21/9X	15. B. SUPERVISOR'S SIGNATURE ☞	DATE
16. UPDATED *(Date & Initials)*		17. UPDATED *(Date & Initials)*		18. UPDATED *(Date & Initials)*	

Circle applicable copy designation:　Supervisor's Copy　Employee's Copy　Training Office Copy

101   Completing FSA-600, Individual Development Plan (Continued)

**B
Examples of
FSA-600
(Continued)**

This is the second example of FSA-600.

REPRODUCE LOCALLY. *Include form number and date on reproductions.*

| FSA-600
(08-13-93) | U.S. DEPARTMENT OF AGRICULTURE
Farm Service Agency
INDIVIDUAL DEVELOPMENT PLAN | *This program or activity will be conducted on a nondiscriminatory basis without regard to race, color, religion, national origin, age, sex, marital status, or disability.* |

| 1. NAME *(Last, First, Middle Initial)*
Smith, Homer A. | 2. UNIT - LOCATION
HRD/Washington, DC | 3. PAGE
1 OF 1 |
| 4. PAY PLAN/SERIES/GRADE
GS-235-14 | 5. CURRENT POSITION
Branch Chief | 6. FISCAL YEAR
199X |

7. No further development is desired or required at this time.   Check Box here → ☐

8. DEVELOPMENT OBJECTIVES: KNOWLEDGE, SKILLS, ABILITIES	9. DEVELOPMENT ASSIGNMENTS	10. TRAINING: COURSES, SEMINARS, ROTATIONAL ASSIGNMENTS, ETC.	11. ESTIMATED COSTS	12. PLANNED	13. ACCOMP.
Strengthen and reinforce interpersonal insight and relationships. (Ability to get ideas accepted, generate cooperation, and guide a group or individual toward task accomplishment.)	Seminar/Discussion Group	Activities of Management and Personal Support. USDA	$405.00	6/22-26/9X	
Improve skills in staff organization and work force planning. (Ability to establish an appropriate course of action by establishing priorities and properly allocating resources.)	Observe staff operations and relationships in another division. (Two-week detail)	On-the-job training in Financial Management Division.	None	2/3-14/9X	

Update knowledge of current management principles and theories. (Ability to evaluate the results of delegated assignments and projects.)	Self-development activity	Read the following books:
		1) Theory X Theory Y
		      (Douglas McGregor)
		2) The Impact of the Organization
		      (Chris Argyris)
			None	FY 199X	

Strengthen effectiveness in making presentations and conducting meetings.	Seminar/Workshop	Effective Presentations Barry Associates	$300.00	4/6-9/9X	

| 14. EMPLOYEE SIGNATURE
☞   /S/ Homer A. Smith | DATE
7/8/9X | 15. A. SUPERVISOR'S SIGNATURE
☞   /s/ Ima Boss | DATE
7/8/9X | 15. B. SUPERVISOR'S SIGNATURE
☞ | DATE |
| 16. UPDATED *(Date & Initials)* | | 17. UPDATED *(Date & Initials)* | | 18. UPDATED *(Date & Initials)* | |

Circle applicable copy designation: Supervisor's Copy   Employee's Copy   Training Office Copy

102-112   (Reserved)

Part 8   Training Programs

113   Overview

A
Introduction   This part contains information on:

- program and technical training
- basic skills, organization and operations training
- management development training
- career development for women
- interagency and non-Government training
- academic training
- DD training
- civil rights training
- training civil rights instructors
- long-term training.

A
Introduction   Technical and program training consists of meetings and short and
                          long term courses on farm programs and technical fields, such as conservation
                          cost-sharing, set-aside, price support, administration, ADP, marketing and
                          accounting, etc. This training is essential to acquaint employees with changes and
                          advancements.

B
Responsibility   Unit head and the appropriate training office and training coordinator shall:

- determine training needs
- select participants based on their job needs
- schedule and document training
- involve participants in planning
- select qualified instructors
- assign responsibility for conducting training
- involve participants in presentations
- evaluate training.

115   Basic Skills, Organization and Operations Training

A   **Introduction**

Instruction in basic skills, such as writing, reading, speaking, listening, machine operations, etc., shall be conducted when needed and feasible to provide all employees with skills necessary for providing quality service to:

- farmers
- the public
- other units
- each other.

This includes training employees in USDA and FSA organization and operations to provide a better understanding and appreciation of roles and responsibilities in carrying out FSA's mission.

B   **Responsibilities**

Unit heads, supervisors, and training office responsibilities are as follows.

- Unit heads, assisted by appropriate training office, shall provide organization and operations training as needed.

- **Supervisors** shall counsel employees regularly on their job performance and assist them in:

  - determining needed improvements
  - arranging suitable training.

- **Training office** shall assist unit heads by arranging appropriate skills training.

*--116 Leadership Development Training

A Introduction

Leadership development training is intended to train supervisors, managers, and executives in management principles, techniques, and skills to equip them to accomplish FSA's mission through proper supervision of employees.

B Responsibility

This table shows the responsibility for FSA leadership development programs.

Responsible Person or Office	Action
Unit head and HRD, TDB.	Provide leadership development training as needed.
Supervisor, manager, or executive.	Complete at least 1 course every 3 to 6 years.

--*

Note: See paragraph 123 on long-term training opportunities for nomination and selection procedures.

*--116 Leadership Development Training (Continued)

C Areas of Training

Training for supervisors, managers, and executives shall focus on ensuring competencies are built according to OPM's Leadership Effectiveness Framework. The competencies needed are outlined in the following table.

OPM COMPETENCY CHART
The Leadership Journey

Managing Self All Employees	Managing Projects Team Leader or Project Manager	Managing People Supervisor	Managing Programs Manager	Leading Organizations Executive	Managing Performance Supervisor, Manager, Executive
Integrity/Honesty Fundamental	Team Building ECQ 2	Human Capital Management ECQ 4	Technology Management ECQ 4	External Awareness ECQ 1	Building Performance Culture
Interpersonal Skills Fundamental	Customer Service ECQ 3	Leveraging Diversity ECQ 2	Financial Management ECQ 4	Vision ECQ 1	Differentiating Performance
Continual Learning Fundamental	Technical Credibility ECQ 3	Conflict Management ECQ 2	Creativity / Innovation ECQ 1	Strategic Thinking ECQ 1	Facilitating Performance
Resilience ECQ 1	Accountability ECQ 3	Public Service Motivation Fundamental	Partnering ECQ 5	Entrepreneurship ECQ 3	Goal Setting
Oral Communication Fundamental	Decisiveness ECQ 3	Developing Others ECQ 2	Political Savvy ECQ 5		Performance Coaching and Feedback
Written Communication Fundamental	Influencing / Negotiating ECQ 5				Understanding Performance Management Processes and Practices
Flexibility ECQ 1					
Problem Solving ECQ 3					

DEVELOPMENTAL PROGRESSION

Executive Core Qualifications (ECQ & Fundamental) are identified as they relate to the Leadership Journey

JM 04/07
Source: OPM

D Supervisory Training

FSA requires that each new first-level supervisor **must** have at least 80 hours of supervisory/leadership training within 12 months after assuming a supervisory position. Only official supervisors are eligible to attend supervisory training courses.

Note: All new National Office, Kansas City, St. Louis, and APFO supervisors **must** complete "The Invitation to Excellence: Leading in FSA" course as part of their 80-hour training requirement.**--***

* * *

117 (Withdrawn--Amend. 4)

*--117.5 Leadership Development Program, "Invitation to Excellence: Leading in FSA" Course for the National, Kansas City, and St. Louis Offices, and APFO Only

A Participation Requirement

All new National, Kansas City, and St. Louis Office, and APFO supervisors that have **not** held a supervisory position within the last year are required to participate in the Leadership Development Program. The Leadership Development Program content is divided into 3 parts, with each part being delivered in 3-workday courses.

Full attendance at each of the 9 workdays of classroom instruction and the following will be required for participants to receive credit for completing the Leadership Development Program training:

- pre-reading 2 assigned books to prepare for the program content
- completing the Clifton StrengthsFinder instrument
- 4 hours of 1-on-1 strengths and leadership coaching
- completing the AgLearn Performance Management Training for Supervisors
- journaling assignments
- final paper.

Once **all** requirements have been completed, participants will be credited with 62 hours of their 80-hour training requirement.

B Leadership Development Program Signup

The Leadership Development Program, "The Invitation to Excellence: Leading in FSA" course is planned to be delivered at least once annually in both Washington, DC, and Kansas City, Missouri, to ensure that all new supervisors have the opportunity to complete their training requirement. New supervisors that need to signup for the Leadership Development Program may e-mail Tracey Foster, HRD at **tracey.foster@wdc.usda.gov**.--*

**A
Purpose**

Interagency and non-Government training programs and courses, including correspondence courses, dealing with subject matter of value in better preparing employees and supervisors to carry out the mission of FSA may be considered within the scope of outside training.

**B
Policy**

FSA uses outside training to supplement in-service training when essential and appropriate to meet training needs of employees.

To the greatest extent practicable, FSA's training needs shall be met through:

- FSA programs, personnel, and facilities

- other Government agencies, such as OPM, GSA, or other interagency course offerings

- non-Government training facilities or instructors.

**C
Agreement to
Continue in
Service**

Employees scheduled for training of over 80 hours in length shall sign, before the beginning of the training period, an agreement to continue in Federal Government service.

- Field employees shall sign the agreement on SF-182, Section G (on the reverse side of copy 1).

- HRD, TDB shall provide an agreement to National Office employees.

**C
Agreement to
Continue in
Service
(Continued)**

This does not apply under 1 or more of the following conditions:

• only cost to the U.S. Government is salary

• training is provided by manufacturers as a normal service to users of the manufacturers' products

• training does not exceed 80 hours within a single program

• training is through correspondence courses.

A
Purpose

Academic training is used to provide for the development of competent employees and enhance employees' interpersonal skills.

Training is not limited to current profession/track. However, each request will be reviewed on a case-by-case basis.

This includes, but is not limited to specialties, such as economics, marketing, conservation, rural development, business and public administration, and management.

B
Restrictions on
Degree Training

FSA will not authorize the selection and assignment of an employee for training, or the payment or reimbursement of the costs of training, for either of the following:

- the purpose of providing an opportunity to an employee to obtain an academic degree to qualify for appointment to a particular position for which the academic degree is a basis requirement

- the sole purpose of providing an opportunity to an employee to obtain 1 or more academic degrees.

C
Part-Time
Enrollment

An employee enrolled in an individual course at a college or university is considered to be enrolled part-time.

D
Full-Time
Enrollment

FSA will not pay tuition for an employee enrolled at a college or university on a full-time basis.

Exception: USDA/1890 National Scholars Program.

E
Criteria for
Selecting
Participants

Recommending and approving authorities shall determine an employee's qualifications for enrolling in academic training courses. Selection criteria include:

- need for improvement

- training previously completed or not completed

- ability to train others

- career enhancement

- personal development

- developing the knowledge, skills, and abilities that will enable employees to perform their official duties

- benefit to FSA.

Notes: * * * Requests for academic training shall be accompanied by written justification. Justifications shall explain how each training course will:

- develop the knowledge, skills, and abilities that will enable employees to perform their official duties

- improve individual and organizational performance

- assist in achieving the Agency's mission and performance goals.

*--Justification shall include the following statement (signed and dated by immediate supervisor):

"I concur with the above statement/justification that the requested training course will develop the knowledge, skills, and abilities that will enable (name of person needing training) to perform their official duties."--*

F
Academic
Expenses

FSA may pay or share tuition and related costs with employees for 2 courses per semester for approved academic training, if a grade of "C" or above is achieved. See paragraph 36 for more details.

Note: After completing academic training, participant shall provide the following to the appropriate training office:

- grade report
- training evaluation.

120   District Director Training Program

A   Program Objectives

The District Director Training Program objectives include:

- establishing a national training program that provides consistent, relevant training for DD's, including basic supervisory training

- providing DD's with the knowledge and skills needed to perform their role effectively.

B   Training Program Responsibilities

HRD, TDB shall:

- ensure overall administration and implementation of the District Director Training Program

- ***--**provide the following, through DAFO:**--***

    - advisory assistance
    - program coordination and development
    - evaluation of training.

***--C   DAFO Responsibility**

DAFO shall monitor the District Director Training Program activities to ensure**--*** completion of objectives.

* * *

E   State Office Responsibilities

State Offices shall:

- ensure that DD's are scheduled for training within 1 year of their selection to the DD position

- receive basic supervisory training

- provide assistance with administration and coordination of training when training location is in the State

- *--notify HRD, Employee Development Section of newly selected DD's within 30 calendar days of selection

- release from regularly scheduled duties those DD's selected to participate or instruct "Leading From the Center: Advanced Leadership Skills for District Directors".--*

F   Planning and Scheduling Training

All newly selected DD's shall receive the necessary training to provide them with the knowledge, skills, and abilities for successfully performing DD duties.

* * *

121   Civil Rights Training

A
Introduction   This paragraph contains the requirements, regulations, and procedures for civil rights training within FSA.

B
Training Policy   USDA regulations require that agencies provide annual training to * * * personnel on civil rights responsibilities. The USDA Office of Civil Rights will specify the required training on an FY basis. * * * It is FSA's policy that additional civil rights training may be identified as the need arises.

121   Civil Rights Training (Continued)

C
Civil Rights
Training
Requirements

The required USDA civil rights training will be determined by USDA's Office of Civil Rights on an annual basis.

*--The required FSA civil rights training will be determined by FSA's OCR on an annual basis.

D
Personnel To Be
Trained

All of the following personnel will be trained for USDA civil rights training requirements unless otherwise identified by USDA's Office of Civil Rights:**--***

- Federal employees

- County Office employees

- part-time and temporary employees, Federal or county, who are working at the time the training is offered

- elected committee persons

- committee minority advisors and alternates if they actively serve.

*--All of the following personnel will be trained for FSA-specified training unless otherwise identified by FSA's OCR:**--***

- Federal employees at the State and County Office level

- County Office employees

- part-time and temporary employees at the State and County level, Federal or county, who are working at the time the training is offered

- elected committee persons

- committee minority advisors and alternates if they actively serve.

121   Civil Rights Training (Continued)

E   Method of Delivery

The method of delivery will be determined by the organizational unit specifying the training. Instructions will be issued by USDA's Office of Civil Rights on how to administer the training.

F   Documenting Training

 *--All civil rights training should be documented by AgLearn.**--***

   * * *

G   Contact Points

The following are contacts for course content and delivery.

IF there are questions about...	THEN contact...
course content	FSA, OCR, at 202-401-7220.
training delivery	***--**Regina Duncan at 202-401-0347 or e-mail at **regina.duncan@wdc.usda.gov**.**--*** *** * ***

122   (Withdrawn--Amend. 4)

123   Long-Term Training and Development

  A   Introduction

   FSA regularly has opportunities to nominate and select employees for long-term supervisory, executive, and career development programs.

   Select employees for long-term training and development opportunities without regard to race, color, religion, sex, national origin, age, marital status or disability, or other factors unrelated to the need for the training.

123   Long-Term Training and Development (Continued)

B   Training Programs

Some of the long-term opportunities available include:

- ***--**Aspiring Leader Program
- Executive Leadership Program
- Executive Potential Program
- New Leader Program
- OPM Federal Executive Institute
- OPM Management Development Centers.**--***

Note: Some programs may be offered only to National Office employees.

C   Merit Promotion Procedures Mandated

Merit promotion procedures must be used when selecting a career or career conditional employee for training that is:

- part of an authorized training agreement, such as, Career Enhancement Program
- part of a promotion program
- required before an employee may be considered for a promotion.

123   Long-Term Training (Continued)

   D   Selecting Participant

   Select participants for long-term training and development opportunities as follows.

   - HRD, TDB shall:

     - review applications for eligibility
     - ***--**select and facilitate panels.

   - Panels shall:

     - review and rank employee nominations using Agency-wide criteria

     - consider candidates without discrimination for any nonmerit reason, such as race, color, religion, sex, national origin, age, marital status, or disability.

   - The panel:

     - recommends final participants

     - refers participants to the Administrator or designee for approval for the allotted number of spaces approved.**--***

   E   HRD, TDB Responsibilities

   HRD, TDB shall:

   - administer the program
   - provide guidance to participants.

123   Long-Term Training (Continued)

**F
Deputy
Administrator
Responsibilities**

Deputy Administrators, when applicable, shall make selection recommendations to ***--**the Administrator based on panel recommendations.

Note: DAM will serve as Chairman of the Deputy Administrators' Selection Committee.

**G
Administrator
Responsibility**

The Administrator or designee shall approve the final participants.**--***

124-133   (Reserved)

Part 9   County Operations Trainee Program

134   Overview

A   COT Training Program Objectives

The COT Program:

- teaches trainees how to effectively conduct COC and County Office activities

- establishes a well-balanced, adaptable program that provides consistent training for candidates nationwide

- exposes trainees to COC's to assist trainees in:

  - improving job knowledge, skills, and abilities
  - enhancing their potential for selection.

B   Selecting Trainee

Select trainees according to 27-PM.

C   Home County Training

An employee is not prohibited from working in a county in which the employee was residing or employed immediately before accepting an appointment as COT.

 *--Example: When a Program Technician is selected as COT, the training County Office may be the County Office in which the employee was employed as a Program Technician.**-
-***

Note: See 27-PM, paragraph 478.

134   Overview (Continued)

D   HRD, TDB Responsibilities

HRD, TDB shall:

- ensure overall training administration of the COT program
- *--provide the following, through DAFO:--*

    - advisory assistance
    - national management training program
    - program coordination and development
    - evaluation of State training activities for COT's.

*--E   DAFO Responsibilities

DAFO shall:**--***

- monitor State COT program activities to ensure completion of objectives
- review individual trainee program from evaluation prepared by State Offices.

134   Overview (Continued)

F
State Office   State Offices shall complete the stages listed in this table.
Responsibilities

Stage	Action
1	*--Ensure that all trainees complete and sign FSA-227.--*
2	Ensure that COT's have an SED-approved IDP before training begins.
3	Develop a training schedule for each trainee containing at least: • date • function • location • responsible trainers • State training objective and related handbook reference. **Note:** Adjust schedule of individual trainees in a training County Office based on conditions within the State, if necessary, to provide training opportunities in a timely manner.
4	Select the trainee headquarters County Office and County Offices where program training shall be held.

5	Conduct evaluation reviews.
	
	• The State Training Officer shall:
	
	  • consult with SED, DD, program specialists, and previous trainers
	  • determine whether the trainee's progress is satisfactory.
	
	• Conduct a minimum of 4 reviews using FSA-854. These reviews must be done at the end of the trainee's 3rd, 6th, 9th, and 12th months of training. Reviews shall not exceed 2 workdays. If deficiencies in the trainee's progress are evident, do either of the following:
	
	  • prescribe additional training
	  • take action to separate the trainee.

<div align="right">Continued on the next page</div>

134   Overview (Continued)

**F
State Office
Responsibilities
(Continued)**

Stage	Action
6	Maintain FSA-279 showing progress of trainees through the training program.
7	*--Place trainees who successfully completed the 52-week training program and the 1-week National FSA Management Training session on the STC Register of Eligible Candidates--* Certificate for CED positions.
8	Separate from service, at any time during the training program, employees whose performance is not satisfactory.

**G
Training County
Headquarters**

State Offices shall select a County Office to serve as interim headquarters for trainees during the training period.

The County Office shall prepare the trainee's:

- payroll
- time and attendance
- leave
- travel compensation
- per diem.

135   Planning and Scheduling Training

A
General
Requirements

All trainees will receive the necessary training to develop the knowledge, skills, and abilities for successfully performing CED duties.

See paragraph 137 for the minimum national training standards for CED positions.

B
Selecting
Training
Counties

State Offices shall identify and select a sufficient number of training County Offices to accommodate hired trainees.

State Offices should consider County Offices with a scope of program activity that can provide trainees with the most extensive background in County Office operations.

C
Selection
Criteria for
Training
Counties

State Offices shall use the following selection criteria:

- training County Office selection is acceptable to COC

- CED is receptive to the trainee program and has an attitude that indicates support of program objectives

- CED has recognized management and supervisory ability, indicated by:

  - a highly motivated staff

  - acceptance by farmers and the community

  - evidence of balanced attention to all activities identified with the CED position

- CED manages in a way that devoting time to the training program will not result in deficiencies in the County Office's program operations

- CED is available to attend trainer conferences and programs

- CED can prepare a training schedule and include a sequential outline of training that includes a schedule of training activities.

D
Workshop for
County Trainers

State Offices shall not place trainees in a training County Office until CED has attended a trainer program or has been thoroughly briefed and oriented by the State Office.

* * *

136   COT Training Requirements

A   Overview

Each COT shall satisfactorily complete a 52-week training program. COT's who do not satisfactorily complete the required training shall be separated from the program, by written notice, according to 27-PM.

B   Exception to 52-Week Training Program

 *--SED's may submit a request to DAFO for a shortened training period based on prior**--*** experience with FSA programs. Send 1 copy of this request to HRD, TDB.

Each request shall include a justification and specify the requested duration of the training period.

C   Training Program Record

State Offices shall ensure that:

- a training program record is prepared and maintained to show the sequence of administrative and program operations, and demonstrated management skills that each COT must have to complete the program

- the State training officer initially prepares the record

- the trainer CED uses the record to indicate COT's progress during the training period

- the training officer maintains a master copy of COT's record for reviewing progress and evaluation with COT's and responsible officials.

136   COT Training Requirements (Continued)

D   National COT Training

*--COT's who are making satisfactory progress will be scheduled for the 1-week National FSA Management Training session. This session shall be scheduled, when possible, between the 10th and 12th month of training.**--***

* * *

E   Evaluating COT's

The State Training Coordinator, consulting with SED, DD, program specialists, and previous trainers, shall determine whether the trainee's progress is satisfactory. This includes:

* using FSA-854
* conducting a minimum of 4 reviews during the training period.

   Notes: These reviews must be done at the end of the trainee's 3rd, 6th, 9th, and 12th months of training.

   Review shall not exceed 2 workdays.

   If deficiencies in trainee's progress are evident, do either of the following:

   * prescribe additional training
   * take action to separate the trainee.

136   COT Training Requirements (Continued)

F   52-Week Evaluation

At the end of the 52 weeks, DD, SED, and STC shall evaluate the COT's performance. This 52-week review shall be used to determine whether COT's:

- shall receive any additional training necessary to qualify them for a permanent County Office position

    Note: The additional training for reconsideration shall not last longer than 1 month. At the end of the additional training, the State Office shall re-evaluate to determine ***--**whether COT should be placed on the Program Technician list for selection by**--*** CED.

- shall be placed on the STC Register of Eligible Candidates Certificate for CED positions after satisfactorily completing the *** * *** 1-week National FSA Management Training session

- failing to be placed on the STC Register of Eligible Candidates Certificate or the Program ***--**Technician list may be separated.**--***

137   National Minimum Training Standards for CED Positions

A   Training Program Objectives

The national minimum training standards for CED positions provided under the COT program shall provide trainees with:

- instruction and experience necessary to effectively perform CED duties
- the opportunity to observe how a County Office operates.

B   Knowledge, Skills, and Abilities

 --COT's, upon completing individual training, are expected to have the following--
demonstrated knowledge, skills, and abilities:

- ability to work effectively with representatives of the State Office, COC, private organizations, farmers' associations, producers, and the general public

- an adequate understanding of farming practices and customs, including the economic needs of farming communities at the county level

- ability to communicate orally and in writing

- knowledge of FSA programs

- ability to apply State policies and objectives at the local level

- skill in effectively applying general management principles to County Office operations.

138   Completing FSA-279, County Operations Trainee Progress Register

A   State Training Coordinator Responsibility

The State Training Coordinator shall immediately submit 2 copies of FSA-279 when either of the following occurs:

- a new trainee is hired
- any entry is made in columns.

B   Distributing FSA-279

Distribute FSA-279 as follows:

- keep original FSA-279 in the State Office
- make 2 photocopies of FSA-279 and send to:

    •*--DAFO--*
    - HRD, TDB.

138   Completing FSA-279, County Operations Trainee Progress Register (Continued)

C   Completing FSA-279

Complete FSA-279 according to this table.

Item	Action
1	Enter State and county name.
2	Enter date of this report or revised register.
3	Enter page number and total number of pages submitted.
4 A	Enter COT's full name (last, first, and middle initial).
4 B	Enter date entered on duty as COT. Original entry on duty date at recruitment must remain the same if employee transfers to another State.
4 C	Place a checkmark to indicate that FSA-854 has been completed * * * at the end of the 3rd, 6th, 9th, and 12th months of training.
4 D	*--Enter date COT completed the 1-week National FSA Management Training course.
4 E	Enter the date that training is satisfactorily completed. This training period shall be not less than 52 weeks (12 months).
4 F	Enter the date that COT who successfully completed the 52-week training program and the 1-week National FSA Management Training shall be placed on the STC Register of Eligible Candidates Certificate for CED positions.--*
* * *	* * *
4 G	Enter the final action and date of termination, additional training for not longer than 1 month, placement as CED, etc., for all trainees.

C
Completing
FSA-279
(Continued)

*--

REPRODUCE LOCALLY. *include form number and date on reproductions.*

FSA-279 (09-14-00)	U.S. DEPARTMENT OF AGRICULTURE Farm Service Agency	1. STATE NAME

COUNTY OPERATIONS TRAINEE PROGRESS REGISTER

Virginia

NOTE: REFER TO 6-PM BEFORE COMPLETING THIS FORM.

2. DATE OF THIS REGISTER	3. PAGE
2/2/XX	1 OF 1

4. TRAINEES:

A. NAME (Last, First, Middle Initial)	B. DATE ENTERED ON DUTY	C. MARK FSA-854 EVALUATION COMPLETED				DATES			G. FINAL ACTION AND DATE
		3RD MONTH	6TH MONTH	9TH MONTH	12TH MONTH	D. DATE NATIONAL FSA MANAGEMENT TRAINING COURSE COMPLETED	E. 12-MONTH TRAINING PROGRAM COMPLETED SATISFACTORILY	F. PLACED ON CED REGISTER	
Bailey, Beverly A.	6/16/XX	X	X	X	X	5/3/XX	6/15/XX	6/18/XX	Selected CED 7/14/XX

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--*

**D
Removing
Trainees Name
From FSA-279**

Remove trainee names from FSA-279 after distributing form, according to subparagraph B, when either of the following occurs:

• trainee is appointed CED and all columns have been completed with the necessary information

• trainee is terminated from program and noted in final action and date column.

Note: Do **not** use FSA-279 to indicate individual's sex, race, or national origin.

139   Completing FSA-854, Evaluation of County Operations Trainee

**A
State Training
Coordinator
Responsibility**

The State Training Coordinator shall consult with SED, DD, program specialists, and previous trainers to determine whether the trainee's progress is satisfactory. This includes:

- using FSA-854
- conducting a minimum of 4 reviews during the training period.

    Note: These reviews must be done at the end of the trainee's 3rd, 6th, 9th, and 12th months of training.

**B
State Office
Responsibility**

This review should not exceed 2 workdays. The State Office shall do either of the following if deficiencies in trainee's progress are evident:

- prescribe additional training
- take action to separate the trainee.

**C
Completing
FSA-854**

Complete FSA-854 according to this table.

Step	Action
1	Complete all items as indicated.
2	Mark 1 box for each rating area.
3	Indicate reason for the rating by making comments in the comments blocks.
4	Make appropriate comments in items 17 through 21.
5	Obtain appropriate signatures.

C
Completing
FSA-854
(Continued)

REPRODUCE LOCALLY. Include form number and date on reproductions.

FSA-854 (09-01-93) U.S. DEPARTMENT OF AGRICULTURE Farm Service Agency	1. TRAINEE'S NAME *(Last, First, Middle Initial)*

EVALUATION OF
COUNTY OPERATIONS TRAINEE

2. STATE

3. PERIOD OF EVALUATION *(Check One)*

| 3rd | | 6th | | 9th | | 12th Month | or | | *(Other)* |

DIRECTIONS: Check one box for each of the following rating areas. Indicate the reason(s) for your evaluation by making your comments below. Use specific examples to support your rating. Refer to specific samples of behavior or any information that indicates deficiencies or accomplishments and comment fully. If deficiencies are noted, give possible action to correct the problem.

4.   KNOWLEDGE OF JOB: Possesses the knowledge of techniques, skills, processes, procedure, and basic technical competence to handle

	UNACCEPTABLE	Lacks basic knowledge needed to function effectively in the present job.
	MARGINAL	Has minimum knowledge needed to perform the primary duties of the end product without detailed instructions or constant guidance.
	FULLY SUCCESSFUL	Has adequate knowledge to function in the job. Needs instruction and/or guidance occasionally.
	SUPERIOR	Has thorough knowledge to cope with nearly every facet of the job. Rarely needs instruction and/or guidance.
	OUTSTANDING	Has significant in-depth knowledge of every facet of the job. Does not need instruction or guidance.

COMMENTS:

5.   TIMELY COMPLETION OF ASSIGNMENTS: Ability to carry job assignments to completion within acceptable timeframes.

	UNACCEPTABLE	Unable/unwilling to complete job assignments; does not accomplish work within acceptable time limits.
	MARGINAL	Slow to complete assignments; has difficulty meeting deadlines; needs to be pushed to complete work.
	FULLY SUCCESSFUL	Completes on-going assignments within acceptable time limits.
	SUPERIOR	Completes work on time even in the face of heavy workloads or short deadlines or completes work before deadline.
	OUTSTANDING	Unusual ability to accomplish an exceptionally heavy workload within acceptable time limits. Can be depended upon to put in extra hours when required. Views extra work as part of the job.

COMMENTS:

6.   QUALITY OF WORK: Ability to pay attention to detail, to be thorough, neat, and accurate. Work is free of error.

	UNACCEPTABLE	Work is usually unacceptable because it is incomplete, frequently contains obvious errors.
	MARGINAL	Work is sometimes not thorough, and contains careless mistakes.
	FULLY SUCCESSFUL	Work is usually thorough, and accurate.
	SUPERIOR	Work is very well thought through and is of superior quality.
	OUTSTANDING	Work shows exceptional attention to detail and is outstandingly thorough, neat and accurate.

COMMENTS:

7.   FLEXIBILITY: Displays flexibility in adapting to changing conditions and learning new tasks. Carries out special assignments and/or handles emergencies skillfully. Trainee can adapt to changes in procedures and responsibilities.

	UNACCEPTABLE	Becomes disoriented when circumstances change; unable/unwilling to learn new tasks.
	MARGINAL	Resists or has difficulty responding to changes in routine procedures; is flustered by changes in workload or by the pressure of deadlines; learns new tasks slowly.
	FULLY SUCCESSFUL	Accepts procedural changes willingly, copes with normal job pressures and deadlines.
	SUPERIOR	Adjusts quickly to changes; can devise procedures when the solution is not "in the book"; meets varying workload demands, even under heavy job pressure.
	OUTSTANDING	Has unusual ability to adapt to new or changing working conditions; effectiveness is seemingly unaffected by even extreme demands and pressures.

COMMENTS:

**C
Completing
FSA-854
(Continued)**

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8.	PLANNING, ORGANIZING AND INITIATING WORK:	Uses a systematic approach in planning and organizing work. Takes initiative.
	UNACCEPTABLE	No plans exist; when plans do exist they cannot be monitored or the results cannot be measured. Does not handle problems when they arise. Fails to initiate action.
	MARGINAL	Planning is haphazard; sometimes disorganized in monitoring and measuring work. Handles problems only after they arise. Is usually not a self-starter.
	FULLY SUCCESSFUL	Plans are documented and can be monitored and measured. Usually solves problems effectively. Initiates action.
	SUPERIOR	Effectively plans a course of action and demonstrates a very organized approach in monitoring and measuring work. Usually anticipates problems and takes corrective action.
	OUTSTANDING	Extremely effective in planning a course of action, usually well-organized. Identifies potential problems and develops contingent actions to prevent them. Is an innovative self-starter.

COMMENTS:

9.	JUDGMENT:	Ability to make sound, timely decisions that are consistent with pertinent facts and circumstances.
	UNACCEPTABLE	Unable to make decisions or consistently makes the wrong decision.
	MARGINAL	Judgment is not always technically sound, or, is frequently unable to reach timely decisions on the course of action to take.
	FULLY SUCCESSFUL	Decisions are usually prompt and workable. Judgment reflects proper consideration of alternatives.
	SUPERIOR	Effective in evaluating problems and developing technically sound solutions; decisions or recommendations are made promptly and are almost always workable as presented.
	OUTSTANDING	Has exceptional technical insight and unusual ability to make sound decisions regarding even complex problems.

COMMENTS:

10.	LISTENING:	Demonstrates the ability to listen to individuals and small groups.
	UNACCEPTABLE	Does not listen to the facts or to the other person's opinion, constantly interrupts. Unwilling or unable to interpret the meaning behind the speaker's words. Unable to stay neutral until speaker has finished speaking.
	MARGINAL	Usually able to listen to the facts and other's opinions. Sometimes interrupts the speaker. Has difficulty interpreting the meaning behind the speaker's words. Usually stays neutral until speaker has finished speaking.
	FULLY SUCCESSFUL	Able to listen to the facts and opinions of others. Attentive and does not interrupt speaker. Usually able to interpret the meaning behind the speaker's words.
	SUPERIOR	Pays attention to the speaker. Sometimes checks his listening accuracy by restating speaker's basic ideas. Able to interpret verbal content of what is being spoken as well as the feelings behind the words.
	OUTSTANDING	Very effective listener; clarifies what the listener thinks he/she heard. Checks perceptions of what he/she is hearing by restating what person is saying and summarizing major ideas and feelings.

COMMENTS:

11.	VERBAL SKILLS:	Ability to use language that is relevant and meaningful. Ability to persuade others.
	UNACCEPTABLE	Usually mumbles, fidgets. Loses train of conversation. Uses confused sentences. Unable to speak effectively in group discussions or in face to face conversations. Usually backs down when challenged.
	MARGINAL	Sometimes has difficulty orally communicating ideas to others. Sometimes rambles, not always effective in presenting point of view during group discussions. Goes along with group consensus.
	FULLY SUCCESSFUL	Usually effective in expressing ideas in discussions; makes own position clear.
	SUPERIOR	Makes a good oral presentation; speaks effectively and convincingly, respects the ideas of others and can be persuasive and convincing to others in conveying own ideas. Responds well when challenged.
	OUTSTANDING	Usually effective in group discussions or when dealing with others about sensitive or very controversial matters. Can sell own ideas despite opposition. Perseveres even when group may not be in agreement; knows how and when to compromise.

COMMENTS:

C
Completing
FSA-854
(Continued)

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NAME:

12. WRITING SKILL: Ability to express thoughts well in writing.	
UNACCEPTABLE	Writing is disorganized and difficult to understand. Work usually requires rewrite because it is incomplete; contains faulty grammar or unacceptable tone.
MARGINAL	Writing is sometimes unclear. Work often requires editing because it lacks thorough organization. Work sometimes contains faulty grammar or needs a change in tone.
FULLY SUCCESSFUL	Written work is acceptable, understandable and suitable for the intended recipient; only minimum rewrite is required.
SUPERIOR	An able writer who expresses thoughts clearly, concisely and effectively.
OUTSTANDING	Unusual ability to relate even very complex thoughts or instructions clearly, logically and in a convincing manner.

COMMENTS:

13. COOPERATION: Ability to work effectively with farmer clients, community, trainer(s), District Director, County Committee, and county office employees. Willingness to observe and conform to FSA policies.	
UNACCEPTABLE	Usually provides services grudgingly; does not support or undermines agency policies and procedures; generally ignores or belittles other people's feelings; causes dissension; is intolerant, uncooperative team worker.
MARGINAL	Sometimes provides services grudgingly; complains about policies and procedures; occasionally lacks tact; occasionally is uncooperative in a team situation.
FULLY SUCCESSFUL	Provides requested services agreeably, supports policies and procedures; tactful; a cooperative team worker; gets along with others.
SUPERIOR	Goes out of way to provide requested services; actively supports policies and procedures; diplomatic in difficult situations; an effective team worker; gets along very well with others.
OUTSTANDING	Enthusiastically provides requested services; is unusually effective in supporting agency policies and procedures; is particularly diplomatic even in extremely difficult situations; an unusually effective team worker; outstanding ability to promote cooperation among team members.

COMMENTS:

14. TAKES RESPONSIBILITY: Accepts responsibility for assigned tasks and for role in decisions or recommendations.	
UNACCEPTABLE	Consistently blames other people or circumstances when project or work results are unfavorable, usually avoids taking a position to support own decisions, frequently looks to others to get them out of difficult situations.
MARGINAL	Sometimes offers excuses when assigned tasks results are unfavorable, is sometimes unwilling to take a position to support own decisions. Sometimes looks to others for rescue in difficult situations.
FULLY SUCCESSFUL	Accepts responsibility for assigned tasks, able to support own decisions. Relies on own resources, accepts responsibility for own decisions or recommendations.
SUPERIOR	Will stand up and be counted; accepts responsibility even for unpleasant tasks and takes full responsibility for actions.
OUTSTANDING	Willingly accepts responsibility for own decisions; doesn't avoid sensitive or complex assignments, even when the outcome could be unpleasant.

COMMENTS:

15. WORKING INDEPENDENTLY: Ability to perform well without detailed instructions.	
UNACCEPTABLE	Unable or unwilling to identify things that need to be done. Unable or unwilling to follow through without a great deal of instruction or guidance. Cannot or does not develop solutions to even simple problems. Cannot be left alone in crisis situations.
MARGINAL	Sometimes identifies things that need to be done. Sometimes has difficulty in following through without instruction or guidance. Sometimes has difficulty developing solutions to simple problems.
FULLY SUCCESSFUL	Able to identify things that need to be done. Is able to follow through without instruction or guidance. Able to develop solutions to most everyday problems.
SUPERIOR	Anticipates things that need to be done. Works independently. Develops solutions to complex problems.
OUTSTANDING	Unusually perceptive at anticipating what needs to be done. Completes an in-depth follow through without prior instruction or guidance. Independently develops solutions to even the most complex problems.

COMMENTS:

C
Completing
FSA-854
(Continued)

FSA-854 *(09-01-93) (Page 4)*

16. PUNCTUALITY/RELIABILITY: Willingness to conform to workdays, starting times and lunch schedules.	
UNACCEPTABLE	Often absent or frequently reports late without good cause. Usually overextends lunch breaks.
MARGINAL	Sometimes absent or sometimes reports late without good cause. Occasionally overextends lunch breaks.
FULLY SUCCESSFUL	Is usually present and on time. Does not overextend lunch breaks.
SUPERIOR	Never absent or late without good cause. Never overextends lunch breaks.
OUTSTANDING	Never absent or late even when there are extenuating circumstances. Never overextends lunch breaks.

COMMENTS:

17. EVALUATION SUMMARY

Has the trainee demonstrated managerial potential?   ☐ YES   ☐ NO

Does the trainee know the role of the CED?   ☐ YES   ☐ NO

Do you feel this individual is suitable for a CED position?   ☐ YES   ☐ NO

If any question was checked "NO," give reason and possible action to correct problem:

18. OVERALL RATING OF TRAINEE DURING THIS PERIOD OF TIME

☐	OUTSTANDING	▸ Far exceeds requirements of job.
☐	SUPERIOR	▸ Normally exceeds requirements of job.
☐	COMPETENT	▸ Fully meets requirements of job.
☐	MINIMALLY ACCEPTABLE	▸ Does not fully meet requirements of job.
☐	UNSATISFACTORY	▸ Does not meet requirements of job.

19. ANSWER AT 12TH MONTH EVALUATION PERIOD ONLY:

At the end of the 12th month training program, should trainee be retained for additional training: ☐ NO   ☐ YES   If Yes, give reason in space provided below

20. ADDITIONAL COMMENTS BY TRAINERS OR REVIEWER:

21. Indicate when and where trainee has been trained and programs learned during this evaluation period.

A. DATES	B. LOCATION	C. PROGRAM(S)

22. Trainee's Signature	Date	
23. Trainer's Signature	Date	Phone Number
24. Reviewer's Signature *(DD or State Training Coordinator)*	Date	Phone Number

139   Completing FSA-854, Evaluation of County Operations Trainee (Continued)

D
Distributing   Distribute FSA-854 as follows:
FSA-854

- keep original FSA-854 in the State Office
- *--make 1 photocopy of FSA-854 and give to COT.--*

    * * *

140-150   (Reserved)

Part 10   Program Technician * * * Training Program

151   Overview

A Introduction

This part contains information on the Program Technician Training Program.
* * *

152   Program Technician Training Program

A Program Objective

The Program Technician Training Program objective is to establish a program that provides practical information and skills that can be used on the job.

B Audience and Class Size

 *--This course is designed for permanent program technicians. Recommended class size is**--***
16 participants.

152   Program Technician Training Program (Continued)

C   HRD, TDB Responsibilities

HRD, TDB shall:

* ensure overall administration of the Program Technician Training Program

* conduct periodic onsite evaluations of training sessions

* evaluate instructor effectiveness

   Note: Instructors who consistently receive poor evaluations may have their certification revoked.

* provide technical assistance to State Office personnel and Program Technician Training Program instructors

* revise training as needed

* provide additional trainer training as needed

* ***--**provide the following, through DAFO:**--***

   * advisory assistance
   * program coordination and development
   * evaluation of training.

*--D   DAFO Responsibility

DAFO shall monitor program technician training activities to ensure that objectives are**--*** completed.

152   Program Technician Training Program (Continued)

E   State Office Responsibilities

State Offices shall:

- organize and schedule training

- notify participants and trainers as soon as possible of the dates and location of session

- provide planning time between the State Coordinator and co-trainers

- *--provide HRD, TDB, through DAFO, with course and instructor evaluations and class--* sign-in sheets

- release from regularly scheduled duties those program assistants selected to participate or instruct in the Program Technician Training Program.

F   Scheduling Training

Schedule program assistants for training within 1 year of their selection.

153   (Withdrawn--Amend. 6)

154-164 (Reserved)

.

Part 11   Other Training

165   Overview

A   Introduction

This part contains information on:

- the County Operations Reviewer Training Program
- training foreign nationals.

166   County Operations Reviewer Training Program

A   Policy

Newly hired COR's shall spend up to 1 month in the headquarters State Office to receive an overview of all programs in the State. For COR's assigned to more than 1 State, the applicable SED's shall determine the amount of time for training in each State, not to exceed 1 month. In addition, the State Office shall:

- give particular attention to programs unfamiliar to the trainee

- decrease this time period, at SED's option, depending on the trainee's qualifications

- ***--**eliminate this time period at SED's recommendation and ORAS concurrence,**--*** depending on the trainee's qualifications.

166   County Operations Reviewer Training Program (Continued)

* * *

B   On-the-Job Training

 *--The newly hired COR shall be assigned to a trained COR, determined by ORAS. The new
    COR must complete at lease 1 review with the assigned COR. The assigned COR shall train
    the newly hired COR in all of the following areas:

- conducting an entrance conference
- conducting a review
- connecting COR's PC to LAN
- preparing workpapers
- using CORP software**--***
- conducting an exit conference
- writing a report.

The trainee shall attend all meetings required of the assigned COR.

*--C   FLP Training

See subparagraph 191 D for FLP training requirements.**--***

166   County Operations Reviewer Training Program (Continued)

D   SED Responsibilities

SED shall:

- notify ORAS ******* of a COR vacancy or impending vacancy

- follow 27-PM for filling COR vacancies

- ***--**request concurrence from ORAS if the State Office training will be eliminated or decreased according to subparagraph A**--***

- assign the newly trained COR to review a County Office in the headquarters State immediately after completing training.

167   Training Foreign Nationals

A Policy

USDA policy is to assist foreign countries in developing their agricultural industry and overall economy.

B Authority

The domestic training of foreign nationals by USDA is authorized by memorandum of agreement with AID.

AID's coordinates, within USDA, agricultural training programs for foreign nationals and the overseas assignments of agricultural specialists.

FSA, working with AID's, provides training in programs assigned to FSA.

C Description of Training

Foreign national training provides information on:

- farm program policies and farming methods
- development and administration of farm programs in their own countries.

*--D Arranging for Training

The Office of External Affairs, Public Affairs staff will arrange for foreign visitor training.**--***

168-178 (Reserved)

Part 12   Using Outside Speakers, Instructors, and Facilities

179   Overview

**A
Introduction**

This part contains information on:

- obtaining:

  - the services of outside speakers and instructors
  - facilities

- requests for group training.

180   Authority

**A
Obtaining
Services of
Instructor or
Speaker**

All offices, except Counties, may obtain the services of instructors or speakers from outside FSA if it would materially improve the training program. Unit heads shall request their needs through the appropriate training office.

**B
Arranging for
Training
Facilities**

*--**MSD,** Resource Coordination Staff or PD, Employee Development Branch or both will arrange for necessary non-FSA training facilities if adequate facilities--*
are not otherwise available.

These offices shall provide advice and assistance to unit heads on these matters.

181   Contracting for Outside Speakers

**A
Contracting for
Speakers**   Offices shall contract for speakers according to this table.

Office	Action
Field	*--Prepare AD-700 and send to PD, Employee Development Branch, 6 weeks before using speaker.--* Include copies of any correspondence between FSA office and the speaker or institution.
Contracting officer *--in KCAO	Prepare solicitation papers and related purchase orders, and issue the contract.
National	Offices requiring the services of an outside speaker shall use the purchase card for all requirements under $2,500 and shall complete the following for requirements over $2,500: • prepare Statement of Work • prepare AD-700 (recommend at least 3 vendors) • send AD-700, Statement of Work, and copies of any correspondence between FSA office and the speaker or institution to MSD • coordinate process with MSD. **Note:** Time-sensitive process. Allow sufficient time (minimum of 10 working days) for MSD to select vendor and process AD-700.--*
MSD	Issue the purchase order or contract to use an outside speaker.

182   Group Training

A
Policy

FSA may enter into training agreements with Government agencies or non-Government training vendors to provide appropriate training. A training agreement **cannot** be made solely for the purpose of providing advisory and technical assistance services.

FSA may pay for this training using purchase orders, SF-182's, or AD-742's, subject to the following considerations:

• degree to which the training would benefit the employee by updating the employee's performance

• expected benefits to FSA

• funds available for training.

The following should also be done:

• training must be approved before the course date
• offers must be obtained from at least 3 vendors.

**B
Requesting
Group Training**

Requests for group training must include specifications outlining:

- scope of training or a detailed subject matter description of training to be provided

- course objectives identifying what participants need to know or be able to do upon course completion

- estimated length of course hours

- why training is essential in carrying out Agency's mission

- identification of participants in terms of:

    - background for course
    - present level of knowledge
    - division, branch, and section in which they work

- the total number of participants

- contact person for additional information and support

- range of dates in which the course should be presented

- recommended vendors, if known.

C
Training
Specifications

Training specifications must be clear. Clearly written specifications that leave little room for interpretation ensure that training vendors deliver what FSA needs.

The scope of training should clearly and specifically describe the actual training to be performed.

D
Requests for
Training

Send group training requests according to this table.

IF located in...	THEN send group training requests to...
Field Offices	*--Chief, Employee Development Branch, PD through Director, KCAO.--*
National Office	Director, HRD.

Note: Requests will be forwarded to the appropriate contracting officer to procure the training with the training office's assistance.

E
Requesting
Customized
Group Training

Requests for FSA-customized group training should include a detailed specification or statement of work in addition to the requirements in subparagraphs B and C.

Continued on the next page

F
Selecting   Training offices shall use the following criteria for selection purposes when
Training Vendor   acquiring off-the-shelf training.

> **Note:** If required training must be tailored or altered to meet the Government's
> requirements, submit AD-700 with supporting documentation to the
> contracting officer.

IF the...	THEN...
total training course cost is $2,500 or less	selection of a course may be made without securing competition if both of the following apply: • distributed among qualified suppliers **Note:** When possible, solicit quotes from other than the previous vendor, before placing a repeat order. • price is considered fair and reasonable.
total training cost is between $2,500 and $25,000 using competitive acquisition procedures and awarding to lowest offeror	• obtain at least 3 quotes, oral or written, from responsible vendors • evaluate quotes and select the responsible bidder who meets the Government's requirements and offers the lowest price • price is determined fair and reasonable.
total training cost is between $10,000 and $25,000 using competitive acquisition procedures, but awarding to other than lowest offeror	forward AD-700 to contracting officer with supporting documentation. **Note:** Supporting documentation includes specifications, evaluation criteria to be used for determining greatest value or most cost-effective offer, and list of interested vendors for bidders mailing list.

**F
Selecting
Training Vendor
(Continued)**

IF the...	THEN...
total training cost is between $2,500 and $25,000 using noncompetitive acquisition procedures (sole-source)	• provide justification for sole source acquisition **Note:** The contracting officer shall determine whether the justification is considered adequate for a sole source acquisition. • forward AD-700 to contracting officer.
total training cost exceeds $25,000	forward AD-700 to contracting officer.
vendor is a Government Agency	issue an interagency agreement.

**G
Justifying Sole
Source Training
Vendor**

When the course cost is between $2,500 and $25,000 and the requester wants to use a certain training vendor, the requester must submit a written justification that:

• describes the required training

• describes the proposed training vendor's unique qualifications, that is, why this is the only vendor capable of performing the training

• explains if vendor holds the copyrights to the training methods needed and is the only vendor that offers the training.

H
Vendor Quotes   Vendor quotes should include as a minimum:

- course outline that meets FSA's specification or statement of work

   Note: The vendor understands what training is to be done and what approach the vendor will take.

- when training can be performed

- total costs of the course, including travel expenses

- list of vendor's references.

I
Evaluating
Training Vendor
Offer

When evaluating a training vendor's offer, ensure that:

- all questions are answered and vendor understands the training to be given

- vendor provides course outline

- vendor has personnel qualified to perform the training

- training course cost is reasonable

- vendor's schedule is comprehensive and technically sound, and vendor has a detailed plan for carrying out the training.

Note: The training office must ensure that the vendor and FSA arrive at a common understanding, through negotiations, on items such as equipment rental, travel, and total course costs.

**J
Administration
of Training
Programs**

The training office specialist in charge of the training will oversee the training effort. This includes ensuring that the office maintains proper records. A training folder must be established for each training program and include the following items:

- copy of course
- all vendors' quotes
- evaluation of the vendors
- AD-700 request
- purchase order, SF-182's or AD-742
- roster of participants or class sign-in sheets
- participants' evaluation forms
- copy of the approved vendor's invoice
- all other necessary items, as needed.

**K
Prohibited
Conduct When
Dealing With
Training
Vendors**

This table lists conduct that is prohibited when dealing with training vendors.

Source	Prohibited Conduct
Competing vendor	Offering, giving, or promising money, gratuities, or other things of value to Agency personnel. Offering, promising, or discussing future employment or business opportunities with the training office employees.
Training office	Seeking or accepting money, gratuities, or other things of value from a competing vendor. Soliciting, discussing, or accepting employment or business opportunities with a competing vendor. Disclosing source selection information to any competing vendor.

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Part 13   FLP Training Programs

Section 1   FLOT Program

191   General Provisions

A   Overview

Section 361 of the CONACT, as amended, requires that adequate training on credit, financial, and farm management be provided to employees who will have loan approval authority.

Note: The training requirement applies to CED's granted loan approval authority under Section 376 of the CONACT.

*--B   Training

FLOT training program is an individually-paced training program that is comprised of 2 phases:

- **Phase 1** applies to all newly hired FLOT's and employees who are transferred or promoted to a position for which FLP loan approval authority is required and includes:

  - completing a 1-week orientation session

  - successfully completing 1-week CFAT session

  - completing exercises and learning materials provided in the FLOT Trainer/Trainee Manual

  - passing all program area testing

  - passing a final comprehensive examination

  Note: Phase 1 shall be completed no later than 1 year from the date of hire or the date the employee was transferred or promoted to a position requiring FLP loan approval authority.

- **Phase 2** applies to any employee who:

  - has completed all the requirements of Phase 1 of the FLOT program

  - is actively working on preparing loan dockets to be submitted for loan approval authority.

  Note: Phase 2 ends at the time the employee is granted loan approval authority.**--***

191   General Provisions (Continued)

*--C Training Headquarters

Phase 1 trainees will be:

- assigned to a trainer and training office for Phase 1 of the training

- co-located with their assigned trainer, unless unusual circumstances require otherwise and a written plan providing for weekly in-person meetings is developed.

Phase 2 trainees will be 1 of the following:

- re-assigned or detailed as appropriate to gain the experience and skills necessary to obtain loan approval authority

- re-assigned or detailed to an office that does not have a FLOT trainer, but has an experienced FLM and adequate case load to meet the training needs of the FLOT

- assigned a FLS or DD as a trainer.**--***

D Training Participants

The following employees **must** successfully complete the training program:

- *--employees who have **not** been formally trained or employed in security-based--* agricultural lending, in making credit decisions, and in completing financial analysis, but will be required * * * to obtain loan approval authority

- COR's not trained in FLP:

  - may attend orientation based on recommendation by SED and FLC * * *
  - must successfully complete the * * * program area tests
  - will not be required to:

    - complete CFAT
    - take the final comprehensive exam
    - demonstrate applied application of acquired knowledge.

191   General Provisions (Continued)

*--E   Administrative Headquarters

State Offices shall select a County Office to serve as administrative headquarters for the trainee during the training period.

The County Office shall prepare the trainee's:

- time and attendance
- travel compensation.

F   Selecting Trainers

The SED with the concurrence of the FLC and in consultation with the State Training Coordinator/Specialist, and DD's shall designate certain FLM's, DD's, and FLS's to serve as trainers for the FLOT training.

Approved trainers must be:

- receptive to the FLOT program and have an attitude that indicates support of the FLP objectives

- willing to train FLOT's

  Note: The trainer **must** be an employee who will commit to the length of time it takes to fully train a FLOT and/or who agrees to participate in the training of several FLOT's over an extended period of time.**--***

191   General Provisions (Continued)

   *--F   Selecting Trainers (Continued)

- have demonstrated an ability to train based on:

  - better then average knowledge of their job
  - analytical skills
  - computer skills
  - knowledge of handbooks and regulations
  - leadership skills
  - communication skills

- be available to provide oversight and guidance to a FLOT without affecting the day-to-day operations of their office

- have delegated authority for loan approval and servicing

- be available to attend training conferences

- be able to prepare a training schedule and outline of the training they will provide

- have management and supervisory skills and abilities as demonstrated by:

  - a highly motivated staff
  - acceptance by farmers and ranchers in the community
  - evidence of balanced attention to all activities identified in their position description
  - evidence that their office is well managed and supervised

- agree to have training responsibilities added to their elements and standards as a collateral duty.**--***

191 General Provisions (Continued)

G Training the Trainers

Before trainers are assigned FLOT's they must:

- *--successfully complete the train-the-trainer training developed by the National Office--*
- complete any required refresher training.

H Responsibilities

HRD, TDB shall:

- ensure overall administration of the FLOT training program
- provide the following, through DAFO:

  - advisory assistance
  - national management training program
  - program coordination and development
  - evaluation of State training activities for FLO's.

DAFO shall monitor State FLOT training program activities in conjunction with DAFLP.
* * *

DAFLP, PDEED shall:

- be the primary staff responsible for the FLOT program
- coordinate, administer and monitor State training activities
- provide train the trainer training
- conduct FLOT orientation training
- coordinate CFAT training
- administer FLOTRACK
- *--ensure that training objectives are met.--*

SED's are responsible for the overall administration and delivery of the FLOT program in their States.

191   General Provisions (Continued)

H   Responsibilities (Continued)

*--FLC or his/her designee is responsible for:

- serving as FLOT program monitor

- recommending trainers to the SED, State Training Coordinator, and DD, as well as assisting in the selection of FLOT trainers

- identifying and recommending offices to be used for training

- monitoring and updating FLOTRACK

- coordinating trainee visits to the State Office

- ensuring that a training plan has been completed by the trainer

- serving as an advocate for the trainee to ensure they receive adequate training and on-the-job experience

- making on-site visits to assess training, determining additional training needs, and providing mentoring and shadowing opportunities for the trainee

- providing training on environmental issues, inventory management, loan servicing, and other program areas, as needed

- working with AO, DD, trainer, and trainee to ensure that the requirements of paragraphs 196, 197, and 198 are followed, as applicable.

District Directors will:

- assist in making the training of the FLOT program successful
- provide mentoring and shadowing opportunities for the trainee
- provide oversight to the trainee and trainer.--*

191   General Provisions (Continued)

H   Responsibilities (Continued)

Trainers shall:

- *--successfully complete the train-the-trainer training developed by the National Office--*
  before accepting a trainee

- complete any refresher training required

- work with the State Office in developing a training plan for the trainee
- develop IDP's with the trainee

- assist the trainee and State Office to ensure that the trainee receives FLOT Orientation
  and CFAT training

- ensure that the trainee receives State Office orientation as outlined in subparagraph 192 D

- use the FLOT Trainer/Trainee Manual to provide training

- schedule trainees to take PAT and comprehensive exams once trainees have completed
  the appropriate sections

- evaluate the trainee on an ongoing basis and provide constructive feedback about their
  progress

- monitor the progress and training of the trainee and insure that timeframes are met.

191   General Provisions (Continued)

I   Tracking Trainees

FLOTRACK is used to:

- register all FLP trainees for orientation and CFAT sessions, or request a waiver for 1 or both of these sessions

- provide training evaluations for trainees and trainers

- record all training information including:

  - ***--**date of orientation session (also recorded in AgLearn)
  - CFAT test score and date completed (also recorded in AgLearn)**--***
  - completion dates of the key concepts for each program section of the training manual
  - PAT and comprehensive exams scores and dates taken
  - type, date, and score of completed loan dockets
  - grade level and date of delegated loan approval authority.

Notes: Only employees who will be working toward a delegated loan approval authority will be entered and monitored in FLOTRACK.

See Exhibit 10 for instructions on accessing and using FLOTRACK.

191   General Provisions (Continued)

J   Training Evaluation

Periodic evaluations of the training will be completed by the trainee and the trainer using
*--FLOTRACK as follows:**--***

- each month for the first 6 months
- quarterly thereafter, until FLOT is granted loan approval authority.

The evaluation process will:

- be completed by both the trainee and the trainer

- ***--**be automatically provided and completed through FLOTRACK**--***

- provide e-mail notification *** * *** to the trainee and trainer when evaluations need to be
  completed

- ***--**provide for completed evaluations to be viewed by FLC, DD, trainer, and trainee

- allow all recipients to evaluate how training is progressing and identify strengths and
  weaknesses.**--***

* * *

K   Travel and Training Expenses

All travel expenses for orientation and CFAT sessions will be paid according to the
instructions in the letter sent to the States notifying them of the scheduled training.

A separate travel/training reserve will be held at the National Office to reimburse States
receiving non-ceiling FLOT positions. State Offices will include approved FLOT related
travel/training costs as part of their monthly travel reimbursement requests submitted to
BUD.

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192   Orientation

A   Orientation Objectives

Orientation provides the participant with an overview of the following:

- history of FLP
- mission, role, and purpose of USDA, FSA, and FLP
- organization structure of USDA, FSA, and FLP
- training objectives
- types of loans, their purposes, and limitations
- direct and guaranteed loan servicing
- outreach and civil rights initiatives
- responsibilities of a credit official
- farm assessment
- communications and customer service skills
- personnel issues.

B   Orientation Participants

Orientation is required for:

- all newly selected FLO's and FLOT's
- CED's designated to obtain FLP loan approval authorities
- *--DD's who have **not** previously obtained loan approval authority.--*

Note: Employees who have been trained in the areas outlined in subparagraph A may be granted a waiver from attending orientation. Cooperative Education students, SCEP students, and other similar intermittent and temporary employees will be deferred from completing orientation (and CFAT) training until the time they become full-time permanent employees. Requests for waivers and deferral of training must be documented in the comment section of FLOTRACK when registering FLOT's.

192   Orientation (Continued)

C   Orientation Sessions

Orientation sessions are:

- scheduled on an as-needed basis
- conducted by the National Office

D   State Office Orientation

All newly selected FLO's and FLOT's will receive State Office orientation that includes:

- at least 1 visit to the State Office
- an introduction to all State Office staff and overview of their roles and responsibilities
- an overview of State Office administrative functions.

Note: The State Office orientation should be held as soon as possible after the selection. The length of the orientation may vary. Sufficient time should be allowed to enable the employee to become familiar with the staff in each program area.

193   FLOT Trainer/Trainee Manual

A   Overview

A FLOT Trainer/Trainee Manual has been developed that:

- augments existing * * * handbooks
- provides a guide for the trainer and trainee and allows for self-paced learning
- is divided into 4 program areas; DLM, DLS, GLM, and GLS
- is used along with hands-on activities to meet learning objectives
- requires applicable Manual sections to be completed before trainee takes PAT.

B   Obtaining FLOT Trainer/Trainee Manual

FLOT Trainer/Trainee Manual is available at * * * **https://indianocean.sc.egov.usda.gov/flp/**.

*--194 CFAT

A CFAT Objectives

CFAT:

- is statutorily required and must be successfully completed

- provides participants with financial data analysis on which to base direct or guaranteed credit decisions

- is required to obtain loan approval authority

- is conducted by an accredited contractor

- sessions may require the participants to complete work in the evening.

B Schedule

All CFAT sessions are:

- conducted from 1 p.m. Monday through noon Friday
- held in a centralized location
- scheduled on an as-needed basis.

CFAT participants are notified when a session is scheduled.**--***

*--195 Experience

A Hands-On Assignments

Hands-on assignments are intended to provide trainee with a wide variety of actions and situations that enhance experience.

Specific hands-on assignments during training should:

- be associated with the subject of the current training modules being studied by the trainee
- focus on the areas of identified weakness.

Note: After completing the training, hands-on assignments will include the complete dockets required to obtain loan approval authority as provided in 1-FLP.

B Demonstration of Acquired Skills

Demonstration of acquired skills during training will include, but is not limited to:

- completing a chattel check
- reconciling agreement of use of proceeds with the security agreement
- processing partial releases
- developing farm business plans for subsequent loans
- analyzing subsequent year's advances made by a guaranteed lender for a line of credit
- scheduling note repayment.

Note: Dockets used to demonstrate acquired skills will not be used to obtain loan approval authority.**--***

196   Testing

A   Testing Components

The testing requirements assist in identifying the trainee's strengths and weaknesses. Testing consists of:

- CFAT Exam

    Note: CFAT Exam is:

    - provided after each CFAT session
    - graded by contractor
    - proctored by contractor.

- CFAT Test 2 and CFAT Test 3

    Note: CFAT Test 2 and CFAT Test 3 will only be taken if an acceptable score is not obtained on the CFAT Exam. CED's are not eligible to complete CFAT Test 3. See subparagraph 198 B.

- each of the 4 PAT's:

    - DLM
    - DLS
    - GLM
    - GLS

Note: PAT's are completed online in FLOTRACK after appropriate FLOT Trainer/Trainee ***--**Manual key concepts have been studied and completion dates have been entered by the trainer into FLOTRACK. PAT's were designed to be used in preparing for the**--*** Comprehensive Exam and may be taken using applicable handbooks * * * and notes. PAT's will be retaken online until a passing score is achieved.

196 Testing (Continued)

A Testing Components (Continued)

- •***--**each of the 4 program category sections covered on the Comprehensive Exam; the program category sections covered are:**--***

  - • Section A - DLM
  - • Section B - DLS
  - • Section C - GLM
  - • Section D - GLS.

  Note: The Comprehensive Exam is divided into Part A and Part B, providing the trainee the opportunity to take this exam over a 2-day period by completing Part A on day 1 and Part B on day 2. The trainee **must** turn in each part on the same day that part of the exam is taken. FLC or designee proctors the Comprehensive Exam. Participant may use applicable handbooks. *** * ***

- •***--**Comp Retest 1 or Comp Retest 2 in each of the 4 program category sections.

  Note: Comp Retest 1 or Comp Retest 2 will be used only if acceptable scores are not**--*** achieved on the Comprehensive Exam.

196   Testing (Continued)

B   Testing Procedures

To maintain uniformity among States in the testing process, FLC or designee shall:

- proctor all tests given to a trainee

- *--provide the trainee with the necessary office supplies, calculator, and work paper to complete the test

- ensure that handbooks are available to the trainee and are free from notes or other markings that would assist in completing the test

- ensure that no notes or other material is brought into or taken from the test site--*

* * *

- ensure that appropriate FLOT Trainer/Trainee Manual sections are only used when completing PAT's

    Note: The FLOT Trainer/Trainee Manual **may not** be used when completing the *--Comprehensive Exam, Comp Retest 1, or Comp Retest 2. It is permissible to use the CFAT manual during testing.

- enter in FLOTRACK:

    - Comprehensive Exam answers for Part A and Part B
    - Comp Retest 1 or Comp Retest 2 answers, as applicable

- conduct exit conferences with all trainees completing the Comprehensive Exam, Comp Retest 1, or Comp Retest 2, about topics the trainee had problems with or needs to--* have clarified.

196   Testing (Continued)

C   Test Results

Test results will:

- be provided through FLOTRACK
- *--contain scores for each category section.--*

D   Acceptable Scores

To ensure that an acceptable level of understanding of credit, financial analysis, and program regulations and implementation is met, a minimum score of 80 percent is required on:

- CFAT Exam, or CFAT Test 2 or CFAT Test 3

- each of the 4 PAT's

- *--each of the 4 program category section areas covered on the Comprehensive Exam, or each completed Comp Retest 1 or Comp Retest 2.--*

196   Testing (Continued)

E   Failure to Achieve Minimum Acceptable Score

When the minimum acceptable score is **not** achieved on the required tests:

- AO shall review performance elements for accuracy, ensuring that requirements for obtaining and maintaining loan approval authority are reflected

- trainer will review and modify the existing IDP to address the areas of weakness in consultation with AO

- trainer will assign specific hands-on work in the areas of weakness from actual dockets

- *--trainee will acquire additional training by reviewing key concepts in the areas of--* weakness, CFAT training manual, and/or acquire additional understanding by a review of handbooks * * *

- trainee will complete the identified hands-on work in the area of weakness

- *--trainee will take CFAT Test 2 or CFAT Test 3 and/or Comp Retest 1 or Comp Retest 2, as applicable.--*

    Note: The results of a test may be used only as a basis for determining training needs or the need for a supervisory review and discussion of performance with the trainee.

197   Monitoring Training Progress

A Performance Rating System

AO shall review the elements and standards established for trainees to determine whether each individual trainee's responsibilities for loan making and servicing are adequately addressed.

All *** * *** actions, including establishing timeframes, monitoring progress/performance,
 *--additional training, and completing any re-testing, if necessary, shall be addressed.

Note: No critical performance element may be established requiring a trainee to pass a test.

B Developing IDP

AO, FLC, DDand trainer will develop IDP's that clearly establish the training required to**--***
obtain:

- a working knowledge and understanding of credit and financial analysis program regulations

- loan approval authority according to 1-FLP.

IDP's will be established for all employees **without** loan approval authority who have position descriptions that include loan approval and servicing responsibilities who have:

- not met the requirements established to obtain these authorities

- not demonstrated a working knowledge and understanding of credit principles and program regulations

- achieved only the minimum acceptable score on required tests.

197   Monitoring Training Progress (Continued)

   C   OTI or PIP

   *--OTI or PIP shall be developed by FLC with the involvement of the trainer, supervisor, DD,**--**
   * and AO for any employee who currently has, is required to have, or has been designated to
   have loan approval authority, who is failing in 1 or more critical performance elements, and
   whose performance elements are determined adequate by the supervisor.

   OTI or PIP will:

   - address the employee's specific weaknesses demonstrated through failure to achieve
     acceptable work performance

   - require new training, retraining, or thorough review of training already received to
     identify and overcome impediments to acceptable work performance

   - require a review of work processes to demonstrate knowledge, skills, and abilities
     essential for acceptable work performance

   Note: Written tests may be used to determine the extent that employees need additional
            training or coaching to achieve acceptable work performance.

   - include specific hands-on work in areas of weakness with specific timeframes for
     completing these assignments on a weekly basis

   - *--include a review and further study of the specific modules and handbooks relating to**--***
     the areas of weakness to reinforce the specific hands-on work.

   The trainer and supervisor shall meet with the employee, as needed, until acceptable work
   performance is demonstrated.

   OTI or PIP can extend from 60 to 120 calendar days.

198 Completing FLP Training

A Timeframe for Completing Training and Receiving Authorities

Employees who became DD's or were hired into an FLP position requiring loan approval authority after January 1, 2000, have 1 calendar year from assuming the position to complete the required training and all testing, and an additional 6 months to obtain delegated loan making and servicing authority.

CED's designated by SED to obtain loan approval authority have 1 calendar year from designation to complete the required training and all testing, and an additional 6 months to obtain delegated loan making and servicing authority.

*--FLO's and FLOT's have 1 year from the date of hire to complete Phase 1 training. FLOT's may be permitted additional time to re-test in the program areas, if needed, and an OTI may be developed.

When a FLOT receives delegated loan approval authority, they will be considered to have completed the FLOT program.**--***

* * * FLO and FLOT may receive career ladder promotions up to and including the GS-9 grade level without loan approval authority, so long as they meet time-in-grade requirements and their performance warrants the promotion based on the performance rating completed by their first level supervisor.

To be promoted to the GS-11 grade level, FLO must have:

- successfully completed the FLOT program

- obtained loan approval authority, and shown proficiency in completing the duties and responsibilities of FLO, with limited supervision

- met time-in-grade requirement

- performed at a level warranting promotion to the GS-11 grade level, based on the performance review completed by their first level supervisor.

198   Completing FLP Training (Continued)

B   Personnel Action

At the end of OTI or PIP, except for CED's, if the supervisor determines that the employee is still failing a critical performance element, the supervisor, in conjunction with AO and KCHRO, will propose appropriate personnel action.

IF...	BUT...	THEN...
an employee who is required to have loan approval authority does not obtain an acceptable score after completing *--Comp Retest 2 in the program category section--*	has demonstrated knowledge, skills, and abilities to interpret, analyze, and apply FSA procedures through docket reviews based upon the SED- and FLC-established credit quality guidelines	SED will do either of the following: • decide if loan approval authority should be delegated to the employee • take any other action as deemed appropriate on a case-by-case-basis.

If loan approval authority is delegated to this employee, at a minimum, all loans and servicing actions approved by this employee will be required to be post-reviewed by the State Office for a period of 1 calendar year.

CED will **not** be eligible to continue pursuing loan approval authority, if any of the following apply:

• CED is still **not** performing at an acceptable level at the end of OTI or PIP

• an acceptable score was not obtained on CFAT Test 2

•*--an acceptable score was not obtained on Comp Retest 2 in a program category section--*

• the required loan dockets have not been completed at the acceptable level of credit quality established by SED and FLC.

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Exhibit 1

Reports, Forms, Abbreviations, and Redelegations of Authority

Reports

This table lists the required report of this handbook.

Reports Control Number	Title	Reporting Period	Submission Date	Negative Reports	Reference
PE-175R	COC Orientation and Training	Annually	State Offices submit to DAFO by April 15	Required	5

Forms

This table lists all forms referenced in this handbook.

Number	Title	Display Reference	Reference
AD-284A	Certificate of Training	35	
AD-349	Employee Address http://www.ocio.usda.gov/irm/forms/ocio_forms.html		69
AD-616	Travel Voucher		36
AD-700	Procurement Request		35, 181, 182
AD-742	Transfer and Adjustment Voucher		182
CA-11	"When Injured at Work"		69
FFAS-367	Leave Record		69
FSA-227	County Operations Trainee Agreement		134
FSA-279	County Operations Trainee Progress Register	138	134
FSA-600	Individual Development Plan	101	100
FSA-854	Evaluation of County Operations Trainee	139	134, 136, 138
RI-70-01	Enrollment Information Guide and Plan Comparison Chart (Send to nontemporary employees)		69
RI-76-21	Description and Certification of Enrollment in the FEGLI Program Booklet		69

Exhibit 1

Reports, Forms, Abbreviations, and Redelegations of Authority (Continued)

Forms (Continued)

Number	Title	Display Reference	Reference
SF-87	Fingerprint Chart - Federal		87
SF-182	Request, Authorization, Agreement, and Certification of Training		Text
SF-1152	Designation of Beneficiary (Unpaid Compensation of Deceased Civilian Employee) http://www.gsa.gov/forms		69
SF-1164	Claim for Reimbursement for Expenditures on Official Business		36
SF-2808	Designation of Beneficiary - Civil Service Retirement System		69
SF-2809	Health Benefits Registration Form http://opm.gov/Forms/html/sf.asp		69
SF-2817	Life Insurance Election		69
SF-2823	Designation of Beneficiary		69
SF-3102	Designation of Beneficiary - FERS		69
TSP-1	Federal Retirement Election Form		69
TSP-3	Designation of Beneficiary Form		69
TSP-BK03	Guide to TSP Investments		69

Abbreviations Not Listed in 1-CM

This table lists all abbreviations referenced in this handbook.

Approved Abbreviations	Term	Reference
AO	Administrative Officer	196, 197, 198
CFAT	credit and financial analysis training	191, 194, 196, 197 198
CONACT	Consolidated Farm and Rural Development Act	191
COT	county operations trainee	2, 5, 6, 100, 134, 136-139
DLM	direct loan making	196
DLS	direct loan servicing	196
DOS	disk operating system	166
FEGLI	Federal Employees' Group Life Insurance	69
FLC	Farm Loan Chief	191, 196-198
FLM	Farm Loan Manager	191, 197, 198
FLO	Farm Loan Officer	191, 192, 198
FLOT	Farm Loan Officer Trainee	191, 192, 198
FLOTRACK	Farm Loan Officer Trainee Tracking System	Part 13, Ex. 10
FLS	farm loan specialist	191
GLM	guaranteed loan making	196
GLS	guaranteed loan servicing	196
IDP	Individual Development Plan	Text
KCHRO	Kansas City Human Resources Office	198
OPF	official personnel folder	Part 3
OTI	opportunity to improve	197, 198
PAT	program area test	193, 196
PCMS	purchase card management system	38, 41
PIP	Performance Improvement Plan	38, 197, 198
POI	personnel office identifier	39, 41
SCEP	Student Career Experience Program	192, Ex. 10
TDB	Training and Development Branch, HRD	Text
VHS	vertical helical scan	20

Exhibit 1

Reports, Forms, Abbreviations, and Redelegations of Authority (Continued)

Redelegations of Authority

This table lists redelegations of authority in this handbook.

Redelegation	Reference
Delegating training responsibilities to Director, HRD	2
Delegating authority to approve or disapprove training	37

Exhibit 2

Definitions of Terms Used in This Handbook

Advanced Supervisory Positions

Advanced supervisory positions are Field Office Chiefs, National Office Branch Chiefs, and equivalent positions.

*--AgLearn

AgLearn is the USDA's department-wide agricultural learning system for managing training records and activities.**--***

* * *

Cost Effective

Cost effective means the program that best meets FSA needs at a competitive price. It does not mean the least expensive program.

Customized Group Training

Customized group training is any publicly offered course modified to meet FSA specifications.

* * *

First-Level Supervisor

A first-level supervisor is an employee, other than County employees, who supervises 3 or more nonsupervisory employees.

Formal Training

Formal training is a classroom setting with a planned program of instruction presented by qualified instructors.

*--FSA's Mission Statement

FSA's mission statement is equitably serving all farmers, ranchers, and agricultural partners by delivering effective, efficient agricultural programs for all Americans.**--***

Exhibit 2

Definitions of Terms Used in This Handbook (Continued)

Job Rotation Training

Job rotation training means a planned assignment that is a change of position, to provide varied functional training to broaden the scope of knowledge and operating ability of the employee involved.

Management Development Training

Management development training is training, seminars and workshops, in the principles of supervision and management.

*--"New Age" Training Programs

"New Age" training programs are programs that use a wide variety of techniques or exercises that conflict with the employee's religious beliefs such as meditation, guided visualization, self-hypnosis, therapeutic touch, biofeedback, yoga, walking on fire, and inducing altered states of consciousness. For more detailed information, refer to EEOC Notice N-915.022 dated September 2, 1988.

Orientation Training

Orientation training is the initial training provided to new employees covering rules, regulations, rights, benefits, administrative matters, and an overview of organizational objectives, functions, and structure as opposed to specific job-related training.

Performance Goals

Performance goals are goals that:

* assist the Agency in meeting management actions
* for organizational and individual efforts, are to improve:

  * information availability
  * technology base
  * FSA program delivery
  * employee knowledge, skills, and abilities
  * policy formulation and evaluation.

Program Training

Program training is a meeting or course on farm programs.

Exhibit 2
Definitions of Terms Used in This Handbook (Continued)

Supervisory Group Executives

Supervisory group executives are the Administrator, Associate Administrator, Deputy Administrators, Assistant Deputy Administrators, and the Executive Assistant to the Administrator.

Supervisory Positions

Supervisory positions are National and Field Office Directors, Deputy Directors, Branch Chiefs, Section Heads, SED's, CED's, and equivalent positions.

Technical Training

Technical training is a meeting or course in subject matter areas such as ADP, marketing, or accounting.

Temporary Duty Training

Temporary duty training means detailing employees to other units or locations for up to 6 months for training.

Training

Training is the process of providing for and making available to an employee, and placing or enrolling the employee in, a planned, prepared, and coordinated program, course, curriculum, subject, system, or routine of instruction or education, in scientific, professional, technical, mechanical, trade, clerical, fiscal, administrative, or other fields that will accomplish both of the following:

- improve individual and organizational performance
- assist in achieving the Agency's mission and performance goals.

* * *

Exhibit 2

Definitions of Terms Used in This Handbook (Continued)

Understudy Training Program

The <u>understudy-training program</u> is the on-the-job training of employees to provide fully qualified candidates to fill future vacancies.

Unit

A <u>unit</u> is an organizational grouping at any specific location with an official in charge.

Unit Head

A <u>unit head</u> is an official in charge of a specific organizational unit.

Exhibit 10
(Par. 191, 196)

Accessing and Using FLOTRACK

1 Accessing FLOTRACK

*--Access FLOTRACK according to the following.

Step	Action
1	Access the FSA Intranet Home Page at **http://intranet.fsa.usda.gov/fsa/**.
2	Under "**Links**", CLICK "**FSA Applications**".
3	Under "**Farm Loan Programs**", CLICK "**Farm Loan Programs Systems**".
4	CLICK "**Logon**".
5	CLICK "**Continued**".
6	Enter eAuthentication user ID and password and CLICK "**Login**".

--*

2 Users and Responsibilities

The following shows users and responsibilities for FLOTRACK.

User	Responsibilities
Trainee	Access FLO training records and PAT's online through FLOTRACK.
Trainer	•*--Inputs the module/key concept completion dates for the trainee--* when it has been determined that the material has been adequately covered. • Proctors PAT's. *--**Note:** When the completion dates for all modules/key concepts of a--* program area have been entered, the system will automatically release the related PAT.
FLC or designee	• State system administrator. • Registers all trainees and trainers into FLOTRACK. • Proctors all Comprehensive Exams and Comp Tests. • Inputs the following information into FLOTRACK: • Comprehensive Exam answers for grading • loan docket scores • date loan approval authority was granted. **Note:** FLC or designee may administer trainer responsibilities. * * *

Exhibit 10
(Par. 191, 196)

Accessing and Using FLOTRACK (Continued)

3   FLC Action

A   Registering Trainees

To register for the orientation and CFAT sessions, FLC or designee must register the trainee in FLOTRACK according to the following.

Step	Action
1	On the FLOTRACK Home Page, CLICK "**Registration Info**".
2	Under "**New User Registration**", CLICK "**Register a New FLO Trainee**". **Note:** When entering nonceiling FLOT's and SCEP students, the "**registration type**" box should be marked as "**other**". The information box nest to "other" should show whether they are a nonceiling FLOT or SCEP student.
3	***--**Enter the trainee and trainer information as directed. Use the icons at the right of the drop-down menus where provided. **Note:** If the trainer's name does not appear in the drop-down list, the information for the trainer will need to be entered by clicking "**Create a New Trainer/FLM Account**". A new trainer account can also be created from the FLOTRACK Home Page by clicking "**User Accounts**".

When trainee has been registered in FLOTRACK, the National Office system administrator will enable access to FLOTRACK training records by activating the trainee's account.**--***

Exhibit 10
(Par. 191, 196)

Accessing and Using FLOTRACK (Continued)

3 FLC Action (Continued)

B Comprehensive Exam

*--After a trainee has completed the Comprehensive Exam or any needed Comp Retest 1 or Comp Retest 2, FLC or designee shall input the answers into FLOTRACK according to**--*** the following.

Step	Action
1	On the FLOTRACK Home Page, CLICK "**FLOT Info**".
2	Under "**FLO Trainee Registration**", CLICK "**COMP Tests**". ***--Note:** A State selection from the drop-down menu may be required.**--***
* * *	* * *
3	Click on the name of the trainee in the "**Trainee Name**" column.
4	CLICK "**Update Answers**" in the "**Action**" column below the "**Comprehensive Test Status**" title bar adjacent to the appropriate test.
5	Enter the date using the calendar icon.
6	***--**Enter trainee answers for each question into FLOTRACK.
7	After **all** answers have been entered, CLICK "**Submit for Grading**". **Note:** If all answers are not entered at 1 time, CLICK "**Save and Return Later**". Administration of the correct test version is necessary for test scores to be properly calculated by FLOTRACK. Contact the system administrator at 202-690-4983 if uncertain as to the correct test version.

Note: FLC or designee must be available to proctor the comprehensive exam and any needed Comp Retest 1 or Comp Retest 2. The comprehensive exam and any needed Comp Retest 1 or Comp Retest 2 will continue to be provided in paper format.**--***

C Loan Dockets and Loan Approval Authority

Enter loan docket scores for trainee and date of delegated loan approval authority according to the following.

Step	Action
1	On the FLOTRACK Home Page, CLICK "**FLOT Info**".
2	Under "FLO Trainee Registration, CLICK "**Dockets**".
* * *	* * *
3	Click on the name of the trainee in the "**Trainee Name**" column and input data.

Note: Once the date of delegated loan approval authority has been entered into ***--**FLOTRACK, the training data will be automatically archived in FLOTRACK.**--***

Exhibit 10
(Par. 191, 196)

Accessing and Using FLOTRACK (Continued)

4   Trainer and Trainee Action

A   Trainer Action

* * *

The trainer **must enter** * * * the dates the trainee completed the appropriate Trainer/Trainee
 *--Manual key concepts into FLOTRACK. Follow the instructions in this table to make PAT's
 accessible to trainees when the appropriate Trainer/Trainee Manual sections have been
 completed.**--***

Step	Action
1	Login to FLOTRACK.
2	On the FLOTRACK Home Page, CLICK "**FLOT Info**".
3	Under "**FLO Trainee List**", CLICK "**FLOT Modules**".
4	CLICK "**Edit**" for the trainee whose information needs to be updated.
5	*--Select a module/key concept and enter the date the module/key concept was satisfactorily completed by the trainee using the calendar icon at the right of the text box of the corresponding module/key concept.**--***

Note: The trainer must be available to proctor PAT. Coordination of PAT release by trainer
with trainee ensures that trainer will be available to proctor the test.

Exhibit 10
(Par. 191, 196)

Accessing and Using FLOTRACK (Continued)

4   Trainer and Trainee Action (Continued)

B   Trainee Action

 --After the National Office system administrator has activated the trainee's FLOTRACK account, the trainee will be able to monitor his/her own progress using FLOTRACK.-- When PAT is accessible, trainee will take PAT online according to the following.

Step	Action
1	Log-in to FLOTRACK.
2	On FLOTRACK Home Page, CLICK "**Program Area Tests**".
3	CLICK "**Take the Test**" in "**Test Status**" column for any PAT that is available for access.
4	CLICK "**Start the Test**" when ready to complete it. **Note:** Once PAT has been started it **must** be completed in the same session.

A score of at least 80 percent must be achieved on all tests to earn a "PASS" result. A "FAIL" will be given for any test result less than 80 percent. PAT's can be retaken as many times as necessary to obtain a "PASS" result. However, a PAT will not be available for retest for 7 full calendar days after a "FAIL" result has been obtained on that PAT.

 *--**Note:**   Only PAT's are taken online. Comprehensive Exam and any needed Comp Retest 1 or Comp Retest 2 are not taken online but will be scored online.

Information on orientation, CFAT, module/key concept completion status dockets, Comprehensive Exam, and loan approval is accessible from the "My Profile" tab at the top of the FLOTRACK Home Page by clicking on that sub menu item.**--***

Exhibit 10
(Par. 191, 196)

Accessing and Using FLOTRACK (Continued)

4   Trainer and Trainee Action (Continued)

*--C   Evaluations

Training evaluations will be provided through FLOTRACK according to subparagraph 191 J.
When notified that the evaluation is available, the trainer and trainee will access evaluations
according to the following table.

Step	Action
1	Log-in to FLOTRACK.
2	On the FLOTRACK Home page, CLICK "Evaluations".
3	From the table, select the evaluation to be completed.
4	"Save" all responses before log-out if evaluation will be completed later.
5	"Submit" evaluation when completed.

Evaluations for each trainer and trainee will be available during a 10-business-day evaluation
period. Both the trainer and trainee are responsible for completing the evaluations when they
are due. At the end of the evaluation period, completed evaluations are saved and archived.
Evaluations that are not accessed, are incomplete or unsaved will be deleted from
FLOTRACK.**--***