

STANDARD OPERATING PROCEDURES (SOP)
FOR
COAST GUARD'S TRAINING SYSTEM
EDUCATION SERVICES OFFICER (ESO)
TRAINING AND ACADEMIA CUSTOMER CARE
TRACKING SYSTEM (TACCTS)
COURSE SUPPORT AND TESTING DIVISION



Force Readiness Command (FC-514)
Coast Guard Institute
February 2011

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U.S. Department of
Homeland Security

United States
Coast Guard



Commandant
United States Coast Guard

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MEMORANDUM

From: Coast Guard Institute

Reply to: Jamie Hubble
Attn of: Jamie.j.hubble@uscg.mil

To: ESO Community

Subj: COAST GUARD TRAINING SYSTEM STANDARD OPERATING PROCEDURES

1. PURPOSE. This promulgates the Standard Operating Procedures (SOP) for the Training and Academia Customer Care Tracking System (TACCTS).
2. ACTION. Regional and Full Time ESO's shall ensure compliance with the provisions of this SOP. Internet release is authorized.
3. DISCUSSION. These SOPs identify the approved processes and procedures used for TACCTS. SOPs apply for all CGI activities within TACCTS.
4. CHANGES. Recommendations for improvements/changes to the SOPs shall be submitted to the owner identified in each individual SOP volume. Updates to the SOP will occur as System Change Proposals (SCP) that are approved and implemented.

#

Dist: ESO Community

Copy: None

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TACCTS SOP Change Summary List

Highlighted blue text denotes major changes. Purely editorial changes are not highlighted. Major changes are summarized as follows:

Change #	Division Affected	Date of Implementation	Synopsis
1	All	6-1-10	Changed the entire SOP to reflect the new division names at the CGI.

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SECTION 1 INTRODUCTION

TACCTS

Overview

This SOP (Standard Operating Procedures) manual introduces the basic tools and knowledge to:

- Assist ESO's in checking EOCT (End-of-Course-Test) Inventory
- Assist ESO's in checking AFCT (Armed Forces Certification Test) Inventory.
- Solving EOCT inventory issues
- Allows the ESO's to interact with the Course Support and Testing (CST) divisions at the CGI.
- Order course material through the 2100 online ordering form
- Administer EOCT through the TACCTS online answer sheet for (Library Units only).
- Submit Challenged Test Question

All documents pertaining to the TACCTS (Training and Academia Customer Care Tracking Tool) are located under the help link in the upper right corner of the screen. This link can be accessed from any screen. Please review all documents in the help section before contacting the CGI with questions.



Help link icon

Purpose

The purpose of this SOP is to identify, establish and publish a clear and standardized set of procedures for navigating through the TACCTS system.

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SECTION 2 TACCTS PROCEDURES ESO

Logging In

Coast Guard Institute Training & Academia Customer Care Tracking System

Please Log In :

User Name :	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Login"/>	

[*Click Here for Password Information](#)

PRIVACY ACT OF 1974

A. AUTHORITY FOR USE AND WHETHER MANDATORY OR VOLUNTARY
(1) 14 U.S.C Sec. 633
(2) Voluntary

B. PRINCIPAL PURPOSE - Establish a computer stored record for an inquiry on a Tuition Assistance and Grants issue or Course Support and Testing issue.

C. ROUTINE PURPOSE
(1) Provide member reference for Tuition Assistance and Grants and Course Support and Testing problems.
(2) Provide status on member's Tuition Assistance and Grants or Course Support and Testing request.

D. EFFECT ON INDIVIDUAL IF NOT PROVIDING INFORMATION
Request will not be processed.

[Institutes Home Page : Click Here](#)

- To log on:
 - ESO (Education Service Officer) will receive a “**User Name**” and temporary password through an automatic email, once the ESO has submitted a designation letter to the CGI CST department.)*[For ESO designation procedures and example see Appendix A of this manual]*
- Type in the “**User Name**” in the User Name block (first initial and last name)
- Type in the temporary password in the “**Password**” block (first initial and last name)

Note: Please review password requirements by clicking “**Click here for password information**”, because the next screen you will be required to create a password.

- Click “**Login**”

Continued on next page.

Please Choose A New Password :

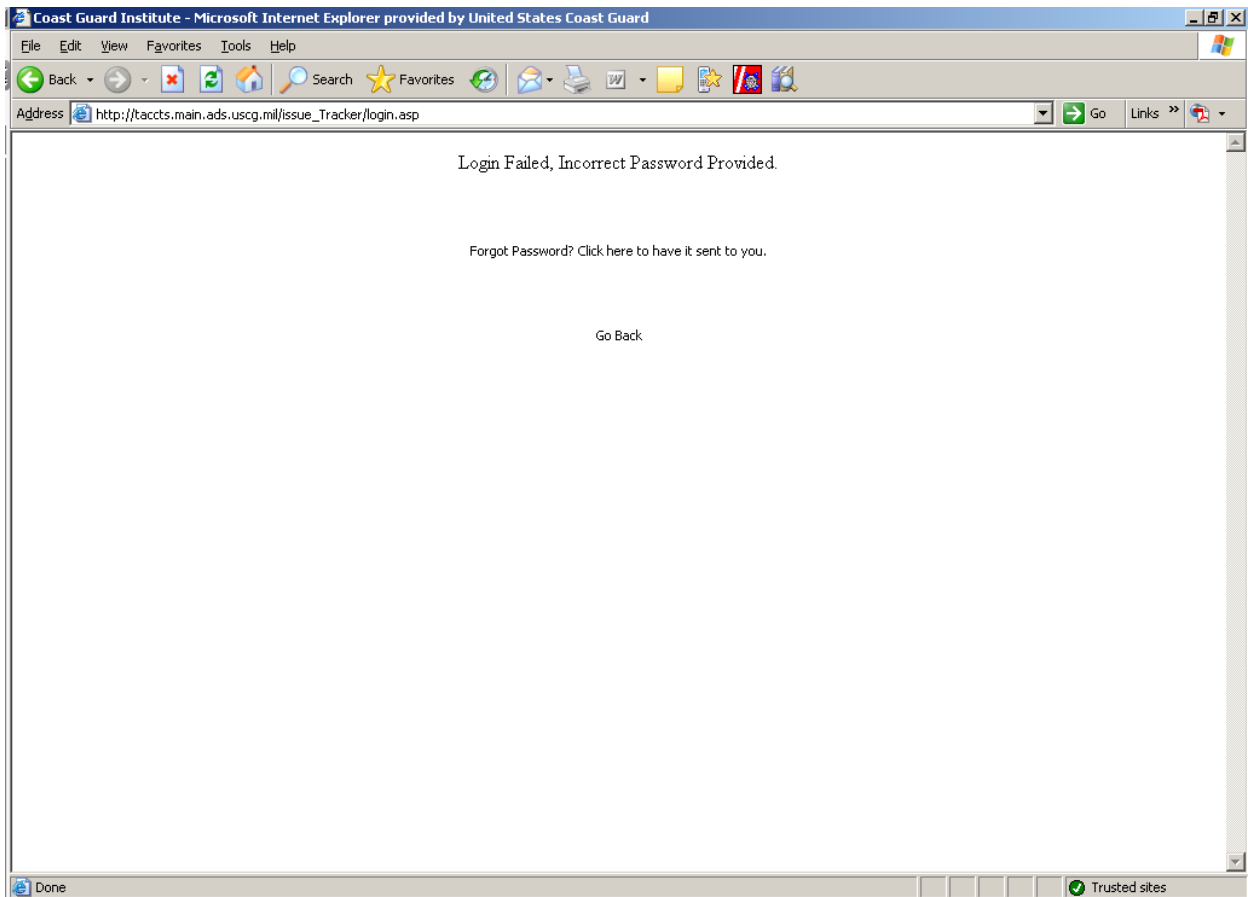
Password :	<input type="text"/>
Verify Password:	<input type="text"/>
<input type="button" value="Submit"/>	

Institutes Home Page : [Click Here](#)

- To create a new password:
 - Type in the new password
 - Min 8 characters, Max 15.
 - Must contain at least one lowercase and one uppercase letter.
 - Must contain at least one numeric value and one special character.
 - Cannot begin or end with a numeric value.
 - The new password will be case sensitive, so make sure caps lock key is turned off.
 - Type the new password again, exactly the same, in the “**Verify Password**” block
 - Click “**Submit**”
-

Forgot Password

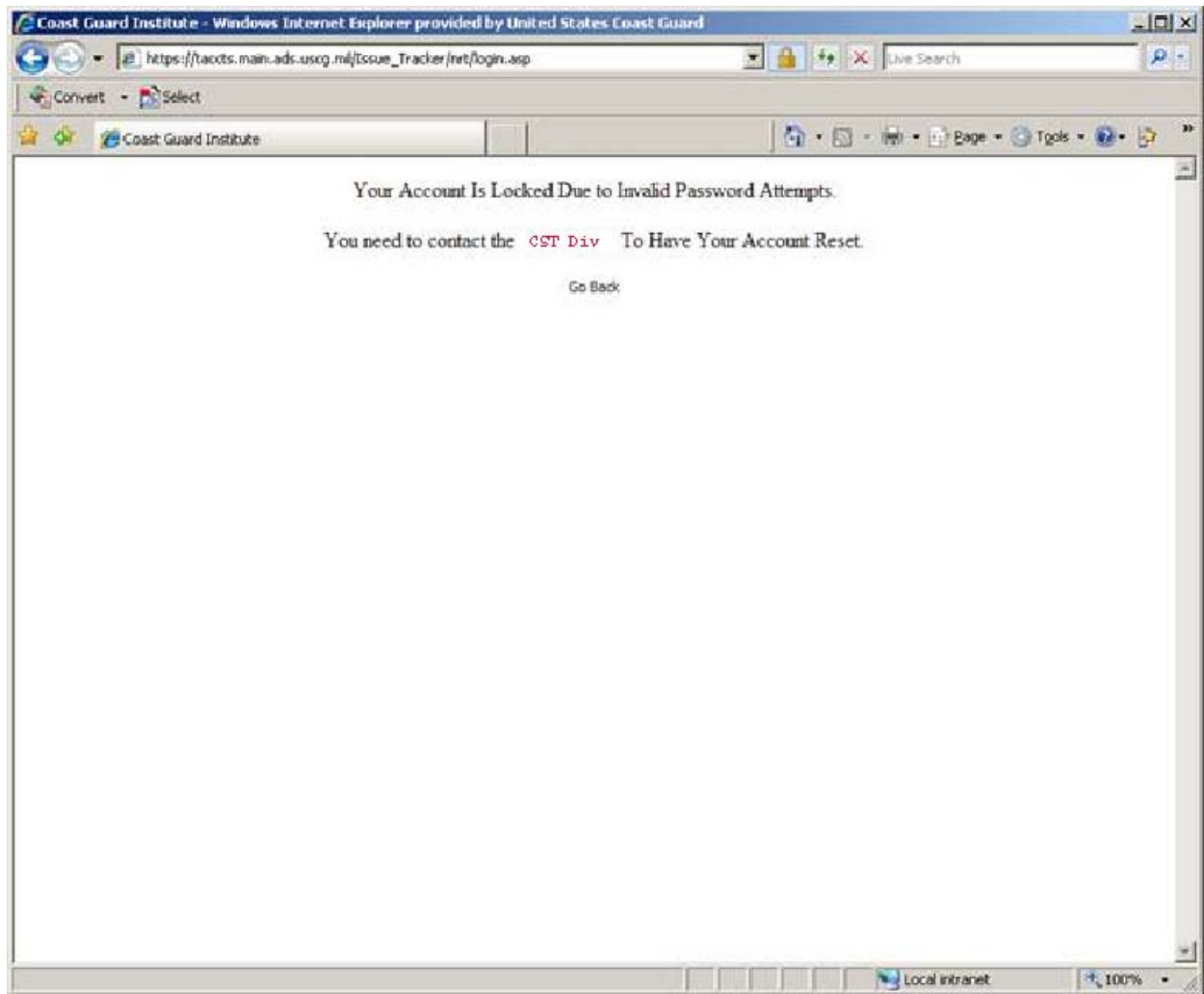
Section 2 TACCTS Procedures



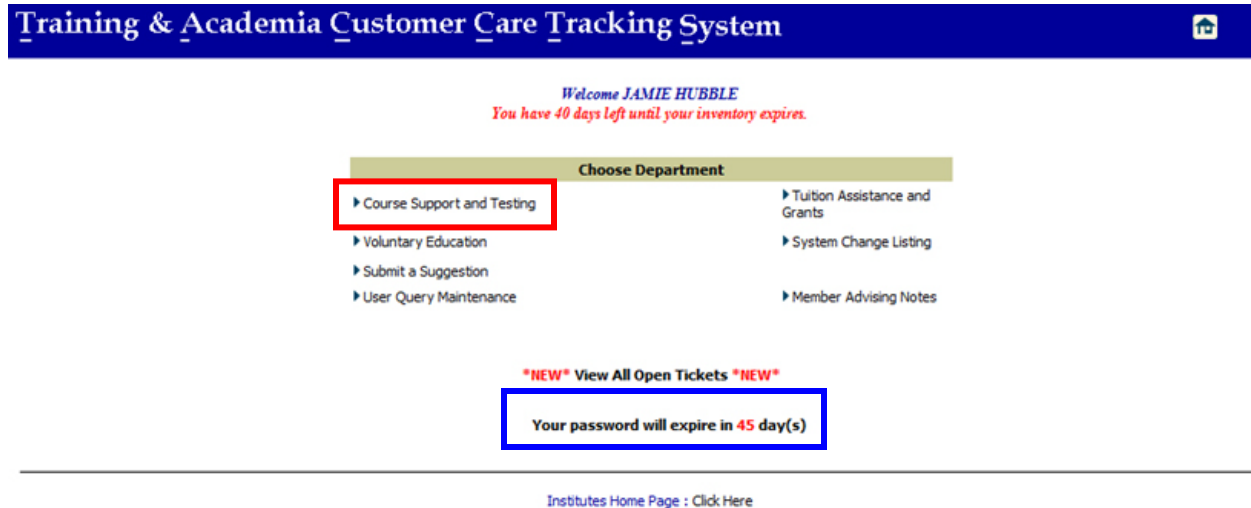
- If you enter the wrong password, this screen will display.
- If you can not remember your password and your account is not locked, then click on **“Forgot Password? Click here to have it sent to you”**, a new temporary password will be emailed to you.
- If you did not forget your password, click on **“Go Back”** and retry log in.
- If your account is locked, you must contact the CGI CST Division to unlock your account.

Invalid Password Attempts Lockout

Section 2 TACCTS Procedures



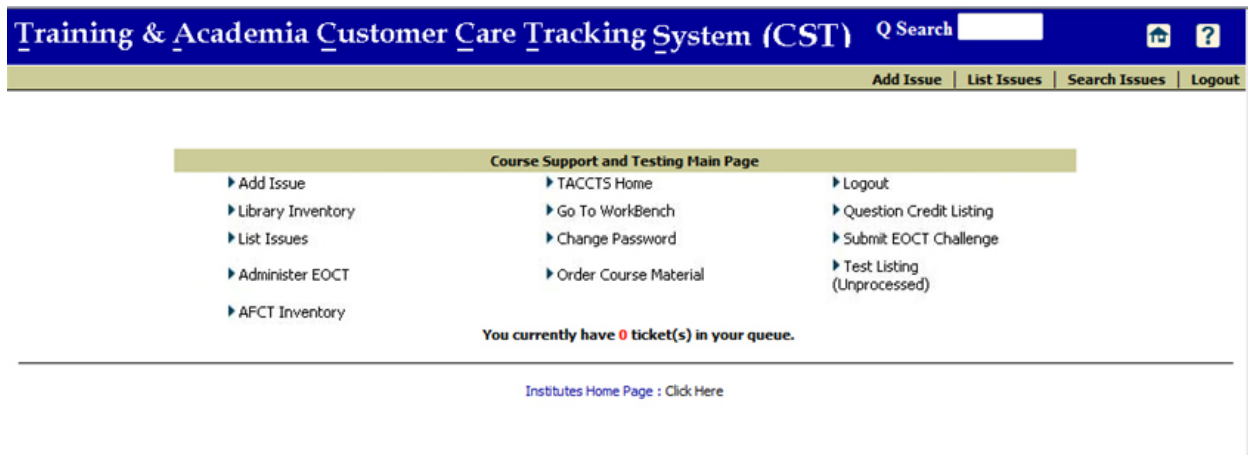
- If you enter the wrong password 3 times, this screen will display.
- You must contact the CST Div. to have your password reset.



- This is the TACCTS Home Page.
- Click on “**Course Support and Testing**” to submit a ticket pertaining to CG Correspondence Courses and End of Course Test (EOCT).

Note: The scrolling banner notifies you when your password will expire. (see blue square)
[Passwords expire every 90 days]

- To view all open tickets for all departments click on “View All Open Tickets”.
- To change password from this screen:
 - Click on the **scrolling banner** to navigate the “Change Password” screen. (see “Change Password” section of this manual for instructions)



- This is the main page for the CST TACCTS system, this page list all the options that are needed to navigate through each procedure.
 - **Add Issue**- this option allows the ESO to submit an issue to the CGI CST Div.
 - **Search Issues**- this option allows the ESO to search through and find a specific issue ticket, whether it be open, closed or on hold.
 - **Q Search** – a quick search by case id # only.
 - **List Issues**- this option list all the current open tickets the ESO has submitted, and allows them to reply to comments sent by the CST Div.
 - **Go to WorkBench**- this option allows the ESO to save a partially created ticket that is not ready to be submitted.
 - **Logout** – this option allows the ESO to logout of TACCTS.
 - **TACCTS Home**- navigates to the ESO Home page which allows the ESO to be able to switch to a different division.

Explanation of this screen continued on next page.

Continued on next page.

Training & Academia Customer Care Tracking System (CST) Q Search

Add Issue | List Issues | Search Issues | Logout

Course Support and Testing Main Page

- ▶ Add Issue
- ▶ Library Inventory
- ▶ List Issues
- ▶ Administer EOCT
- ▶ AFCT Inventory
- ▶ TACCTS Home
- ▶ Go To WorkBench
- ▶ Change Password
- ▶ Order Course Material
- ▶ Logout
- ▶ Question Credit Listing
- ▶ Submit EOCT Challenge
- ▶ Test Listing (Unprocessed)

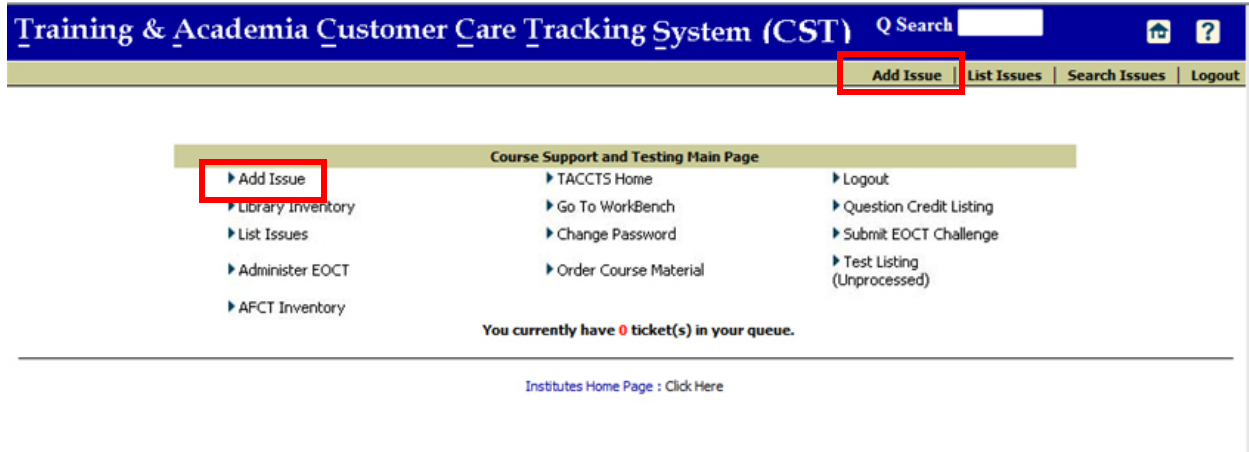
You currently have 0 ticket(s) in your queue.

Institutes Home Page : [Click Here](#)

- **Order Course Material-** This is a direct link to the 2100 online form.
- **Administer EOCT-** This allows the ESO to administer and submit EOCT electronically. (Library Units only)
- **Library Inventory** – this option allows the ESO to check the EOCT inventory at their unit and report it to the CGI. (Library Units only)
- **EOCT Inventory** - this option allows the ESO to check the EOCT inventory at their unit and report it to the CGI. (Non-Library Units only)
- **Change Password-** this option allows the ESO to change their TACCTS password at any time.
- **Test Listing (Unprocessed)** – this option allows the ESO to view all test that have been submitted to the CGI but have not yet been processed.
- **Department Open ticket queue (scrolling banner, see red square)-** this marquee lets the ESO immediately know how many open tickets exist per department.
- **Question Credit Listing** - option allows the ESO to view test questions that have been credited or changed.
- **Submit EOCT Challenge** - option allows the ESO to submit and EOCT question challenge to the Subject Matter Specialist (SMS).

Add Issue

Section 2 TACCTS Procedures



- Click on “**Add Issue**” (either link)
- Use this option to submit non-EOCT inventory issues to the CST div.

Examples: Add and delete from ESO list, A-school entry, EOCT results not posted in DA. ect....

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	<input type="text"/>
Member Identifier:	<input type="text"/>
Description:	21 DAY WAIVER REQUEST ▾
Comments:	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <div style="text-align: right; font-size: small;">1000 characters left</div>
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Submitted By:	JAMIE HUBBLE ▾
Assigned To:	Course Support and Testing ▾
Request Date:	7/22/2010
Status:	Open ▾
Priority:	Normal ▾
<input type="button" value="Submit"/>	

- To add a new issue, fill in each field.
 - **Issue Name-** Enter the Members name.
 - **Member Identifier-** Type in the member's EMPLID
 - **Description-** Click on drop down menu and select the option that best describes the issue.
 - **Comments-** This mandatory field is for the details concerning the issue.
Example: ESO gave member obsolete test, need waiver to take correct test.

(explanation of this screen is continued on next page)

Continued on next page.

Add New Issue	
Issue Name:	<input type="text"/>
Member Identifier:	<input type="text"/>
Description:	21 DAY WAIVER REQUEST <input type="text"/>
Comments:	<input type="text"/> characters left 1000
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Submitted By:	JAMIE HUBBLE <input type="text"/>
Assigned To:	Course Support and Testing <input type="text"/>
Request Date:	7/22/2010
Status:	Open <input type="text"/>
Priority:	Normal <input type="text"/>
<input type="button" value="Submit"/>	

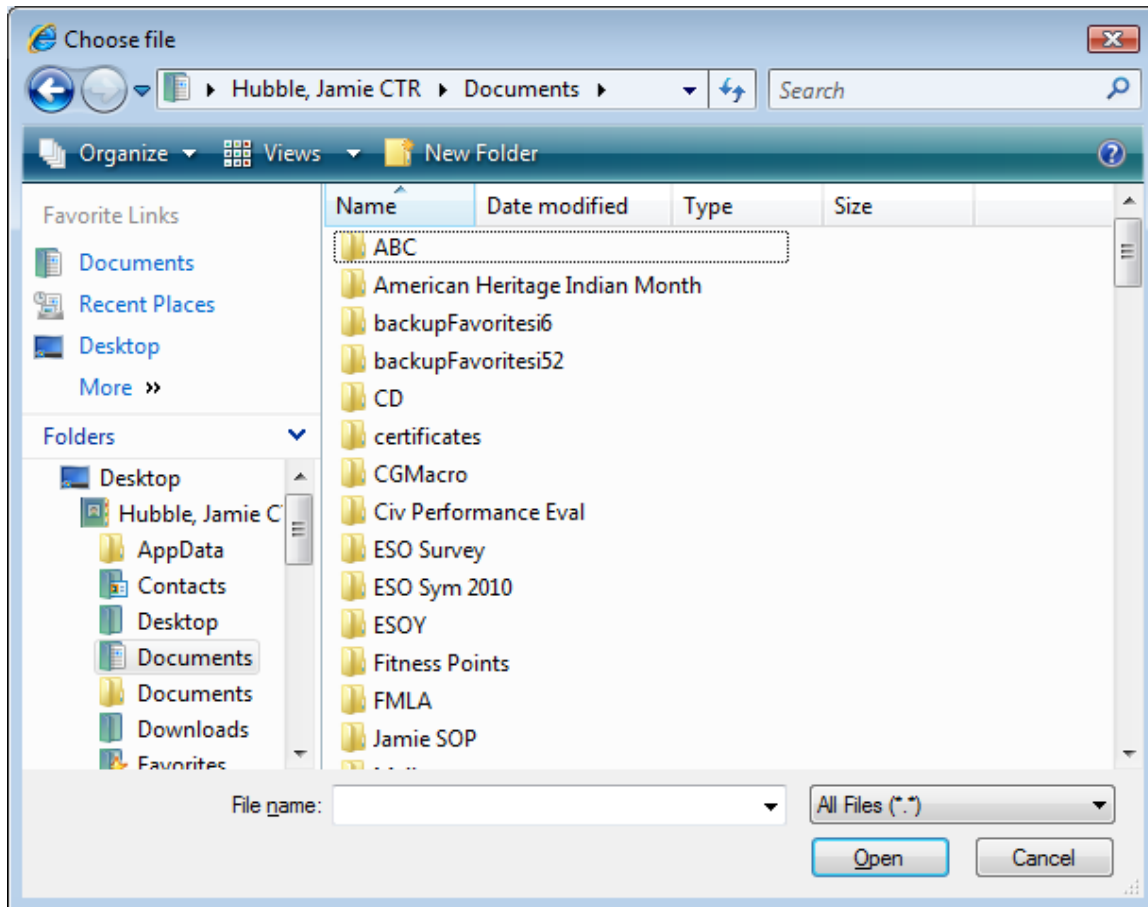
- **Attachments-** This option allows the ESO to send an attachment with the issue ticket if needed.
 - To upload attachment:
 - Click on “**Browse**”

Important!

Naming Conventions used for attachments uploaded to TACCTS- All attachments must be named the “members last name_current date”; attachments with the same names will overwrite previous attachments with same names. If there is more than one attachment for that member that day, use “members last name-1_current date”, “members last name-2_current date”, ect... Attachments uploaded via TAACTS will now have special characters removed from the file names.

(explanation of this screen is continued on next page)

Continued on next page.



- A browse window will appear.
- Locate document to be attached.
- Click on the document to be attached.
- Click **“Open”**

(explanation of this screen is continued on next page)

Continued on next page.

Add New Issue	
Issue Name:	<input type="text"/>
Member Identifier:	<input type="text"/>
Description:	21 DAY WAIVER REQUEST <input type="button" value="v"/>
Comments:	<div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div> <div style="text-align: right; font-size: small;">1000 characters left</div>
Attachments:	<div style="border: 1px solid red; padding: 2px;">Attachment 1: \\CGIMS-RISAPPS\Use <input type="button" value="Browse..."/></div> <div style="background-color: yellow; padding: 2px; margin-top: 2px;">Add a file</div>
Submitted By:	JAMIE HUBBLE <input type="button" value="v"/>
Assigned To:	Course Support and Testing <input type="button" value="v"/>
Request Date:	7/22/2010
Status:	Open <input type="button" value="v"/>
Priority:	Normal <input type="button" value="v"/>
<input type="button" value="Submit"/>	


- The file will appear in the “**Attachment 1**” block.
- If more than one file needs to be attached:
 - After the first file is attached.
 - Click on “**Add a file**” (highlighted in yellow)

(explanation of this screen is continued on next page)

Continued on next page.

Add issue (Continued)

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	<input type="text"/>
Member Identifier:	<input type="text"/>
Description:	<input type="text"/>
Comments:	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p style="text-align: right;">1000 characters left</p>
Attachments:	Attachment 1: \\CGIMS-RISAPPS\Use <input type="button" value="Browse..."/> Attachment 2: \\CGIMS-RISAPPS\Use <input type="button" value="Browse..."/> <input style="background-color: yellow;" type="button" value="Add a file"/> 
Submitted By:	JAMIE HUBBLE ▾
Assigned To:	Non-Resident Training ▾
Request Date:	7/22/2010
Status:	Open ▾
Priority:	Normal ▾
<input type="button" value="Submit"/>	

- This will open an “**Attachment 2**” block. (see red arrow)
- As many attachments needed, can be uploaded. (**up to 5mb**)
 - Click on “**Add a file**” (highlighted in yellow) after each attachment is uploaded to add additional attachments.

(explanation of this screen is continued on next page)

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	<input type="text"/>
Member Identifier:	<input type="text"/>
Description:	21 DAY WAIVER REQUEST ▾
Comments:	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <div style="text-align: right; font-size: small;">1000 characters left</div>
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Submitted By:	JAMIE HUBBLE ▾
Assigned To:	Course Support and Testing ▾
Request Date:	7/22/2010
Status:	Open ▾
Priority:	Normal ▾
<input type="button" value="Submit"/>	

- **Submitted By-** This field will automatically default to the current ESO's name (your name).
- **Assigned to-** This field will automatically default to “**Course Support and Testing**”.
- **Request Date-** This field will automatically default to today's date or the date the issue is submitted.
- **Status-** This field will automatically default to “**Open**”. (When a ticket is submitted it will be considered an open ticket until the CST Div. addresses the issue.)
- **Priority-** Click on the drop down menu to select the priority of the issue.
- Click on “**Submit**” to submit the issue to CST Div.

Note: Once “Submit” is clicked on, it will be grayed out. To prevent errors from occurring. This is also true for “Save and Update” buttons used throughout the procedures.

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

The screenshot shows a web browser window with the URL http://cgims-instdata3.main.ads.uscg.mil/issue_Tracker/nrt/addissue.asp. The page title is "Coast Guard Institute - Microsoft Internet Explorer provided by UNCLASSIFIED". The form is titled "Add New Issue" and contains the following fields:

- Issue Name:
- Member Identifier:
- Description:
Correct Shipping Address:
Enter In Correct Mailing Address Information Here.
- Comments:
- Attachments: Attachment 1:
- Submitted By:
- Assigned To:
- Request Date:
- Status:
- Priority:

A "Submit" button is located at the bottom left of the form.

- There is one “Description” that changes the fields on the “Add Issue” screen when selected.
- If “Course Material Not Received” is selected a text box will become visible asking for the correct address the course material will need to be sent to.
- This is very important! The address the member wants the course material sent to is entered in this box.

Continued on next page.

Add Issue (Continued)

Section 2 TACCTS Procedures

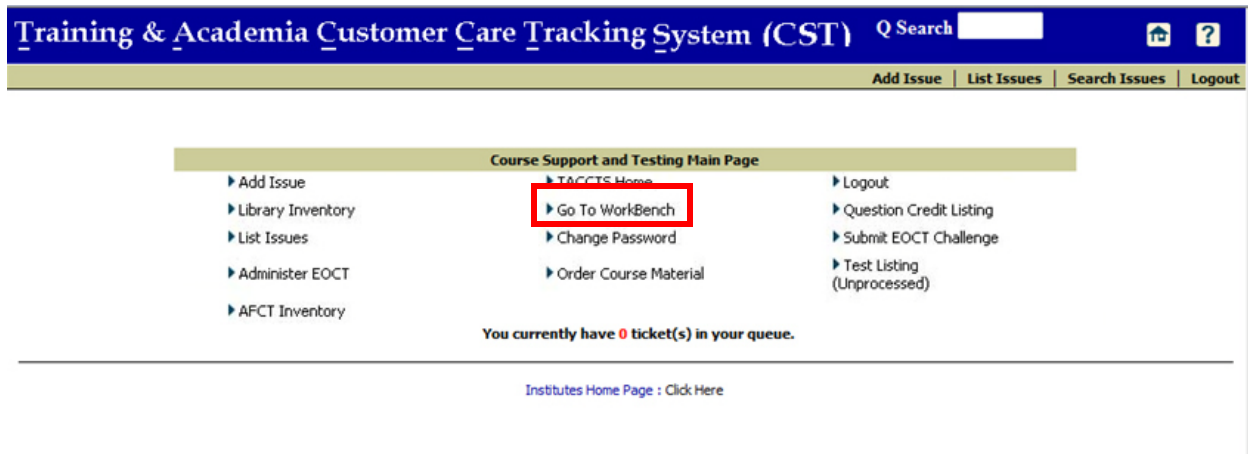
Procedure Instructions

Once an issue has been submitted. The ESO will receive an email indicating the issue was assigned to the Institute and the ticket will be listed in the ESO's "**List Issue**" screen. Once the institute receives the email notification, the ticket will be assigned to a technician to work the issue. Anytime there is an update to the ticket, the ESO will receive an email indicating the update. The ESO does not have to log into TACCTS to view the comments on the update. The comments will be included in the email. Sometimes an attachment will need to be sent to the ESO from the CST Div. The attachment will be located in the email received to notify the ESO the case has been updated. Attachments can also be opened from the ticket itself.

Verify this paragraph with Richard.

Go to Workbench

Section 2 TACCTS Procedures



- **Go to WorkBench**- this option allows the ESO to save a partially created ticket that can be submitted at a later date.

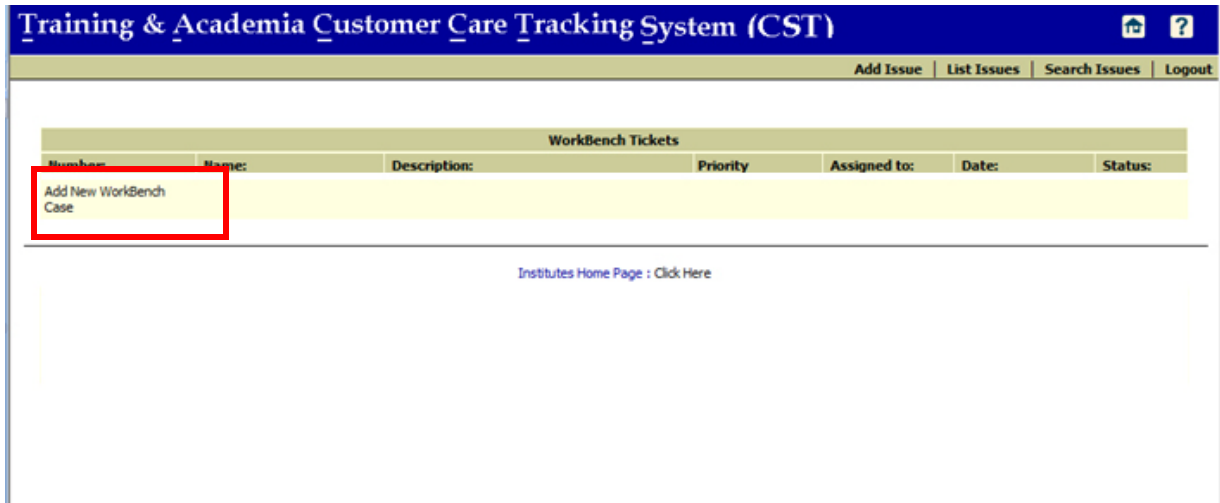
Note: If an ESO needs to partially create a ticket to submit at a later time, save the ticket to the WorkBench. The TACCTS system will time out for non- activity, so if a ticket is started in the Workbench and then left, when the system automatically logs out, the partially created ticket is lost. If the ticket is saved to the Workbench, the ESO can access the Workbench tickets at a later time to add information and then submit the ticket.

- To view or submit tickets from the WorkBench.
 - Click on **“Go to WorkBench”**

Continued on next page.

Go to Workbench (Continued)

Section 2 TACCTS Procedures



- Click on **“Add New WorkBench Case”**. (see red arrow on screen print).

Continued on next page.

Go to Workbench (Continued)

Section 2 TACCTS Procedures

Add New Issue To WorkBench	
Issue Name:	<input type="text"/>
Member Identifier:	<input type="text"/>
Description:	A-SCHOOL ENTRY ▾
Comments: <small>(* 1000 Char. Limit *)</small>	<input type="text"/>
Submitted By:	JAMIE HUBBLE ▾
Assigned To:	Course Support and Testing ▾
Request Date:	7/22/2010
Status:	Open ▾
Priority:	Normal ▾
<input type="button" value="Save To WorkBench"/>	

- Fill in desired information.
- Click on “**Save to WorkBench**”.

WorkBench Tickets						
Number:	Name:	Description:	Priority	Assigned to:	Date:	Status:
233	GRIMM Question	TRACK A REQUEST	Normal	Course Support and Testing	4/17/2010 8:53:47 AM	Open
234	GRIMM Question	TRACK A REQUEST	Normal	Course Support and Testing	4/17/2010 8:53:48 AM	Open
235	EPME4 for Darder, Daniel SN	TRACK A REQUEST	Normal	Course Support and Testing	4/26/2010 12:22:15 PM	Open
240	Chandler, Ryan	COURSE MATERIAL FOR OPEN BOOK EXAMS	Normal	Course Support and Testing	5/14/2010 4:01:14 PM	Open
249	Unable to Access ESO Inventory	END OF MONTH INVENTORY (NON LIBRARY)	Normal	Course Support and Testing	7/1/2010 8:28:10 AM	Open
Add New WorkBench Case						

[Institutes Home Page : Click Here](#)

- Once the ticket is saved to the “**Workbench**”
- It will be listed in the “**WorkBench Tickets**” screen.
- Click anywhere on the row of the ticket to view the details of the ticket, to add information to ticket or submit the ticket.

Continued on next page.

Go to Workbench (Continued)

Section 2 TACCTS Procedures

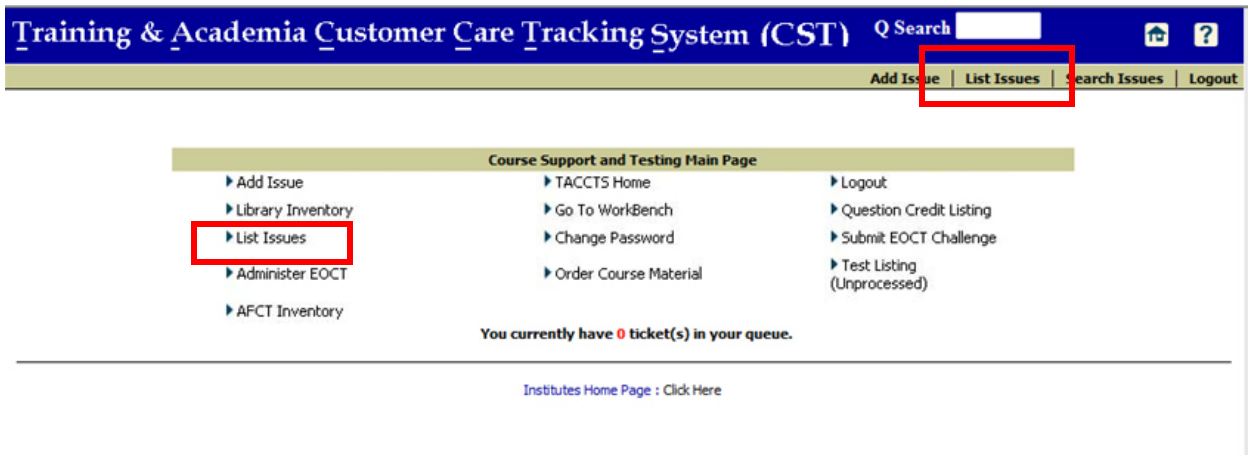
Modify WorkBench Issue	
Issue Number:	233
Issue Name:	GRIMM Question
Member Identifier:	
Description:	TRACK A REQUEST
Submitted By:	
Assigned To:	
Submit Date :	7/22/2010 8:24:15 AM
Status:	Open
Priority:	Normal
Comments:	Member is a reservist and needs to know whether she can still gather points when sitting for testing when the EOCT is taken during their drilling or active duty time. Please advise.
Attachments: *Attachments Are Not Saved. Only Attach Documents When Ready To Submit Ticket.	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
<input type="button" value="Save"/> <input type="button" value="Delete"/>	
<input type="button" value="Submit Ticket"/>	

- Fill in the desired fields. (Finish creating the ticket)
- Click “**Submit Ticket**”.
- If ticket still isn’t ready to be submitted:
 - Click on “**Save**”.
 - Click on “**Delete**” to delete the ticket completely.

Note: A WorkBench ticket that is submitted will no longer show up in the “**WorkBench list**”. It will now be located in the “**List Issues**” screen.

List Issues

Section 2 TACCTS Procedures



- To view the ESO’s tickets submitted to the CST Div:
 - Click on “**List Issues**” (either link).



- If the “**List Issue**” screen appears like this example.
- This means the ESO has no open tickets.
- Click on “**Click here to view all**” to display all of the closed tickets for that ESO without having to perform a “**Search**”.

Continued on next page.

Training & Academia Customer Care Tracking System (CST) Q Search <input type="text"/>							
Add Issue List Issues Search Issues Logout							
List Results							
Case ID :	Name:	Description:	Priority	Assigned to:	Date:	Status:	Last Modified:
110331	Test for SOP do not delete	DESTRUCTION OF EOCTS	Normal	CGI50	7/22/2010 8:34:53 AM	Pending ESO Response	7/22/2010 9:09:08 AM
110332	Test for SOP	ESO DESIGNATION/RELIEF	Normal	CGI50	7/22/2010 8:35:59 AM	On Hold	7/22/2010 9:09:29 AM
110334	Test for SOP	A-SCHOOL ENTRY	Normal	CGI50	7/22/2010 8:36:48 AM	In Progress	7/22/2010 9:09:51 AM
110335	Test for SOP	REQUEST FOR OPTIC & MAILING ADDRESS	Normal	CGI50	7/22/2010 8:37:29 AM	Open	7/22/2010 8:37:30 AM

You are now viewing records 1 through 4 out of 4 records.

<< Back || Next >> || Last Page >>
 View All

- If the “**List Issue**” screen appears like this example, the ESO has open tickets.
- To view the details of the ticket, click anywhere on the row of the ticket. (further instructions on following page)
- To view tickets that have already been closed from this view, click on “**Search Issue**” (in the upper right hand corner of the screen).
- To navigate from page to page, click on “**Back, Next or Last Page**” (see red square)

Note: the color coding is due to the status the ticket is currently in.

- Yellow – open
- Green – in progress
- Red – pending ESO response
- Gray – on hold
- Purple – Request reopen

Continued on next page.

Training & Academia Customer Care Tracking System (CST) Q Search

[Add Issue](#) | [List Issues](#) | [Search Issues](#) | [Logout](#)

To request a status update, click on the Assigned to Section.

Case ID: 110331
 Issue Name: Test for SOP do not delete
 Member Identifier:
 Member Name: Joe Coastle
 Description: DESTRUCTION OF EOCTS
 Submitted by: JAMIE HUBBLE
 Assigned to: Course Support and Testing
 Tech Assigned: CG150
 Request Date: 7/22/2010 8:34:53 AM
 Status: Pending ESO Response
 Priority: Normal
 Date Resolved:
 Resolution:
 Previous Attachments:

[Add Comment](#) | [Print Issue](#)

Comments:	Date:	Comment By:
assigned	7/22/2010 9:09:08 AM	CG150
uploaded attachemts	7/22/2010 8:43:46 AM	JAMIE HUBBLE
Thank you	7/22/2010 8:34:55 AM	JAMIE HUBBLE
Ticket Creation	7/22/2010 8:34:53 AM	System

- This screen shows the details of the member’s ticket. Be sure to pay special attention to the comments section. This section informs the ESO the steps that have been taken from the CST Division. in resolving the issue, and all activity for the selected issue since the ticket was created. To reply to a comment from CST:
 - Click on “**Add Comment**” (See next page for more steps to add a comment)
 - To request a status up date:
 - Clicking on the “**Assigned to:**” field will automatically open an email addressed to the CST Div. (See red box on screen print)
- To print this page:
 - Click on “**Print Issue**”.
 - A print dialog box will appear, select the printer and click on “**Print**”.
 - This will print the entire screen including all ticket comments.

Add Comment (Modify Issue)

Section 2 TACCTS Procedures

Modify Issue (Add Comment)

Case ID: 110331

Issue Name: Test for SOP do not delete

Member Identifier: 1129807

Member Name: Joe Coasite

Description: DESTRUCTION OF EOCT'S

Submitted By: JAMIE HUBBLE

Assigned To: Course Support and Testing

Technician Assigned: CGI50

Submit Date : 7/22/2010 8:34:53 AM

Status: Pending ESO Response

Priority: Normal

Attachments: Attachment 1: Browse...
Add a file

Previous Attachments:

Comments:
characters left 1000

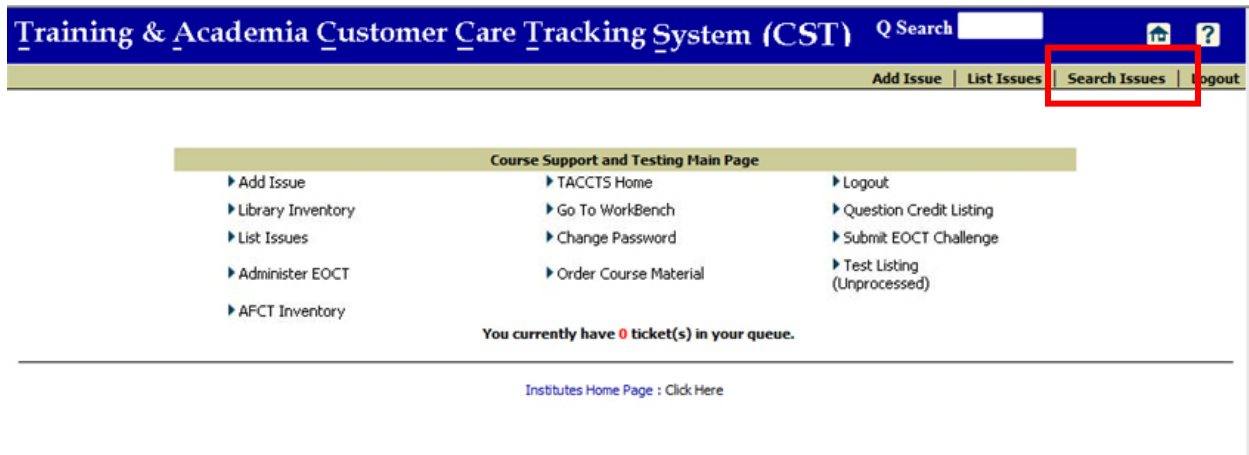
Update

- Click in the “**Comments**” field.
- Type necessary comments. (The right had corner of the comment box displays how many characters you have left that can be typed in the box, each comment box allows 1000 characters)

Note 1: The comments history can be viewed at the bottom of the screen.

Note 2: If necessary the ESO can modify the “Issue Name”, “Member Identifier”, “Member Name” and “Priority Level” fields.

- Click on “**Update**”.
 - This will automatically generate an email to the CST Div. informing them of the comments added to the issue.
- Attachments can be uploaded and sent with the comments to the CST Div.
- TACCTS saves all attachments that are sent. Previous attachments can be viewed by clicking on the attachment icon, in the “**Previous Attachments**” section above. (see red square)



- To find a particular ticket whether it be “open”, “closed” or “on hold”.
 - Click on “**Search Issues**”

Continued on next page.

Search Issues (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Saved Search:		<input type="text"/>
Submitted By:	= <input type="text"/>	<input type="text"/> <input type="button" value="v"/>
Case ID:	= <input type="text"/>	<input type="text"/>
Assigned To:	= <input type="text"/>	<input type="text"/>
Member Name:	= <input type="text"/>	<input type="text"/>
Member Identifier:	= <input type="text"/>	<input type="text"/>
Comments:	Contains <input type="text"/>	<input type="text"/>
Priority:	= <input type="text"/>	<input type="text"/>
Status:	= <input type="text"/>	<input type="text"/>
Problem Type:	= <input type="text"/>	<input type="text"/>
Resolution Code:	= <input type="text"/>	<input type="text"/>
Ticket Creation Date Range:		
Starting Date:		<input type="text"/>
Ending Date:		<input type="text"/>
Ticket Resolved Date Range:		
Starting Date:		<input type="text"/>
Ending		<input type="text"/>

- Type in as much information known about the ticket as possible. If there is more than one ticket with similar information, all of those tickets will show up in the search results. The more information known about the particular ticket in question, the better. “Search Issues” allows the ESO to search through open, closed, or on hold tickets.
- If there is more than one ESO’s at a unit, click on the down arrow next to the “**Submitted by**” to select your name or to search for tickets submitted by other ESO’s at the same unit. (see red circle)

Note: The ESO’s name will not appear in the drop down menu if there aren’t any tickets in the system for that ESO.

(instructions continued on next page)

Continued on next page.

Search Issues (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Saved Search:		<input type="text"/>
Submitted By:	= <input type="text"/>	<input type="text"/>
Case ID:	= <input type="text"/>	<input type="text"/>
Assigned To:	= <input type="text"/>	<input type="text"/>
Member Name:	= <input type="text"/>	<input type="text"/>
Member Identifier:	= <input type="text"/>	<input type="text"/>
Comments:	Contains <input type="text"/>	<input type="text"/>
Priority:	= <input type="text"/>	<input type="text"/>
Status:	= <input type="text"/>	<input type="text"/>
Problem Type:	= <input type="text"/>	<input type="text"/>
Resolution Code:	= <input type="text"/>	<input type="text"/>
Ticket Creation Date Range:		
Starting Date:		<input type="text"/>
Ending Date:		<input type="text"/>
Ticket Resolved Date Range:		
Starting Date:		<input type="text"/>
Ending		<input type="text"/>

- The drop down menu next to each component allows for a more robust searching capability. (see red square)
 - = (equal too)
 - ≠ (not equal too)
 - Like
- After typing in the desired information.
 - Click on “**Search**”

Note: ESO's can use the search page to search any ticket in the system. This is still done by division and the ESO's name will still be the default on the search listing, but can be changed.

Continued on next page.

Search Issues (Continued)

Section 2 TACCTS Procedures

53561	AFCT Inv. Adj. for Opfac: 3246900	AFCT/ASVAB INVENTORY MAINTENANCE	Normal		h-Resident ining	4/8/2009 9:43:08 AM	Closed
53562	AFCT Inv. Adj. for Opfac: 3246900	AFCT/ASVAB INVENTORY MAINTENANCE	Normal		h-Resident ining	4/8/2009 9:44:41 AM	Closed
54957	AFCT Inv. Adj. for Opfac: 3246900	AFCT/ASVAB INVENTORY MAINTENANCE	Normal		h-Resident ining	4/21/2009 9:43:10 AM	Closed
▶ Search Again							
▶ Export to Excel							
▶ Save Search							

Note: the color coding is due to the status the ticket is currently in.

- Yellow – open
 - Green – in progress
 - Red – pending ESO response
 - Gray – on hold
 - Blue - Closed
 - Purple - request reopen
- Search results:
 - Click anywhere on the row of the ticket to view the details of the ticket.
 - If the search results did not generate the desired ticket or if another ticket is desired.
 - Click on “**Search Again**” (in the bottom left corner of the screen). This option will navigate you back to the “Search for Issues” screen.
 - If the ESO uses the same search criteria numerous times, the search can be saved for future use.
 - Click on “**Save Search**”.

Continued on next page.

Save Ticket Search

Search Name:

- Type the name of the saved search in the “**Search Name**” field.
- Click on “**Save**”.

Search for Issues:

Saved Search:		<input type="text"/>
Submitted By:	= <input type="text"/>	NAME OF SEARCH <input type="text"/>
Case ID:	= <input type="text"/>	<input type="text"/>
Assigned To:	= <input type="text"/>	<input type="text"/>
Member Name:	= <input type="text"/>	<input type="text"/>
Member Identifier:	= <input type="text"/>	<input type="text"/>
Comments:	Contains <input type="text"/>	<input type="text"/>
Priority:	= <input type="text"/>	<input type="text"/>

- The saved search will now display in the “**Saved Search**” drop down menu on the “**Search for Issues**” screen.

Welcome JAMIE HUBBLE
You have 40 days left until your inventory expires.

Choose Department

- ▶ Course Support and Testing
- ▶ Voluntary Education
- ▶ Submit a Suggestion
- ▶ User Query Maintenance
- ▶ Tuition Assistance and Grants
- ▶ System Change Listing
- ▶ Member Advising Notes

NEW* View All Open Tickets *NEW

Your password will expire in 45 day(s)

[Institutes Home Page : Click Here](#)

- The ESO can manage their saved searches by clicking on the “User Query Maintenance” on the “TACCTS Home” page.

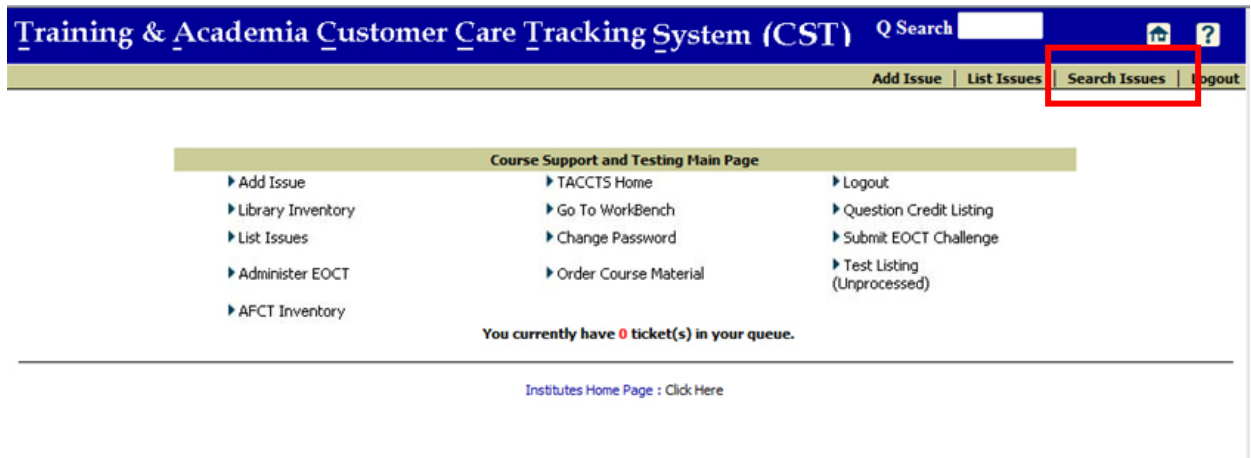
Query ID:	Query Name:	Date Added:	Query Department:	Action:
23	NAME OF SEARCH	4/21/2009 10:54:25 AM	Course Support and Testing	delete

BACK

- Each saved search is department oriented. (ie.. if an ESO sets up a saved search for CST, the same saved search will not be available for TAG, it will need to be set up in both departments. The page will display all saved searches for each department.
- Click on “**delete**” to delete a saved search.

**Procedure
Instructions**

The CGI has made an Excel spreadsheet available to keep track of tickets. Follow the screen prints step-by-step to download Excel spreadsheet to PC. It is recommended that this task be completed once a month for a traceable means of the tickets sent to the CST Div.



- Click on “**Search Issues**”

Continued on next page.

Excel Spread Sheet (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Submitted By:	=	
Case ID:	=	
Assigned To:	=	
Member Name:	=	
Member Identifier:	=	
Comments:	Contains	
Priority:	=	
Status:	=	
Problem Type:	=	
Resolution Code:	=	
Ticket Creation Date Range:		
Starting Date:		
Ending Date:		
Ticket Resolved Date Range:		
Starting Date:		
Ending Date:		
<input type="button" value="Search"/>		

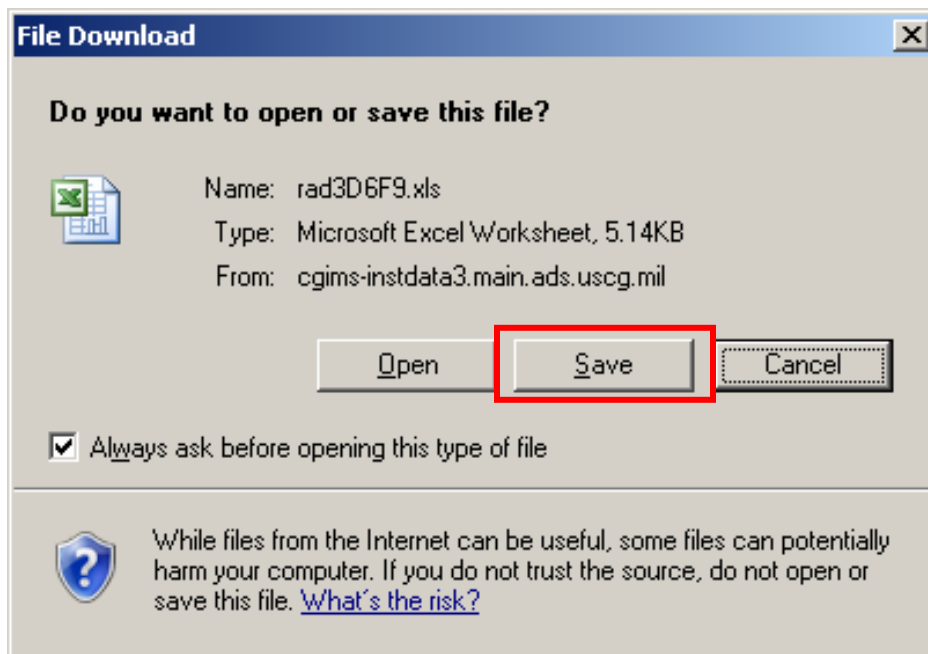
- The spreadsheet will be generated based on the search criteria provided.
 - Fill in the desired criteria.
 - Click on “**Search**” button.

Note: The Excel spreadsheet will generate a report for any tickets returned by the search results. Examples: Spreadsheet for all open tickets, all closed tickets, all tickets for one member, for one technician, ect....

Continued on next page.

53561	AFCT Inv. Adj. for Opfac: 3246900	AFCT/ASVAB INVENTORY MAINTENANCE	Normal		h-Resident ining	4/8/2009 9:43:08 AM	Closed
53562	AFCT Inv. Adj. for Opfac: 3246900	AFCT/ASVAB INVENTORY MAINTENANCE	Normal		h-Resident ining	4/8/2009 9:44:41 AM	Closed
54957	AFCT Inv. Adj. for Opfac: 3246900	AFCT/ASVAB INVENTORY MAINTENANCE	Normal		h-Resident ining	4/21/2009 9:43:10 AM	Closed
▶ Search Again							
▶ Export To Excel							
▶ Save Search							

- Click on “**Export to Excel**” (bottom left corner of screen).



- Click on “**Save**”.

Continued on next page.

Excel Spread Sheet (Continued)

Section 2 TACCTS Procedures



- A browse window will appear.
- Use the “**Save In**” block down arrow to select the desired place the document will be saved. (see red circle)
- Click on “**Save**” on the browse window. (see red square)

Continued on next page.

Excel Spread Sheet (Continued)

Section 2 TACCTS Procedures

Microsoft Excel - rad0A755.xls

UNCLASSIFIED

File Edit View Insert Format Tools Data Window Help Adobe PDF

Type a question for help

Quick Print

Arial 10 B I U

A9

Case ID	Member's Identifier	Member's Name	Problem Desc	Priority	Submitted By	Assigned To
2817		JONATHAN TOY	21 DAY WAIVER REQUEST	Normal		Non-Resident Training 1
Total: 1						

This Document Contains FOUO Information.

Sheet1

Ready NUM

Start My Documents 2 Microsof... Adobe Phot... Inbox - Micr... 2 Internet... 3 Microso... 10:00 AM

- To view the Excel spreadsheet
 - Go to where the spreadsheet was saved.
 - Double click to open.
- This is an example of the Excel spreadsheet.

Quick Search

Section 2 TACCTS Procedures

Training & Academia Customer Care Tracking System (CST) Q Search

[Add Issue](#) | [List Issues](#) | [Search Issues](#) | [Logout](#)

Course Support and Testing Main Page

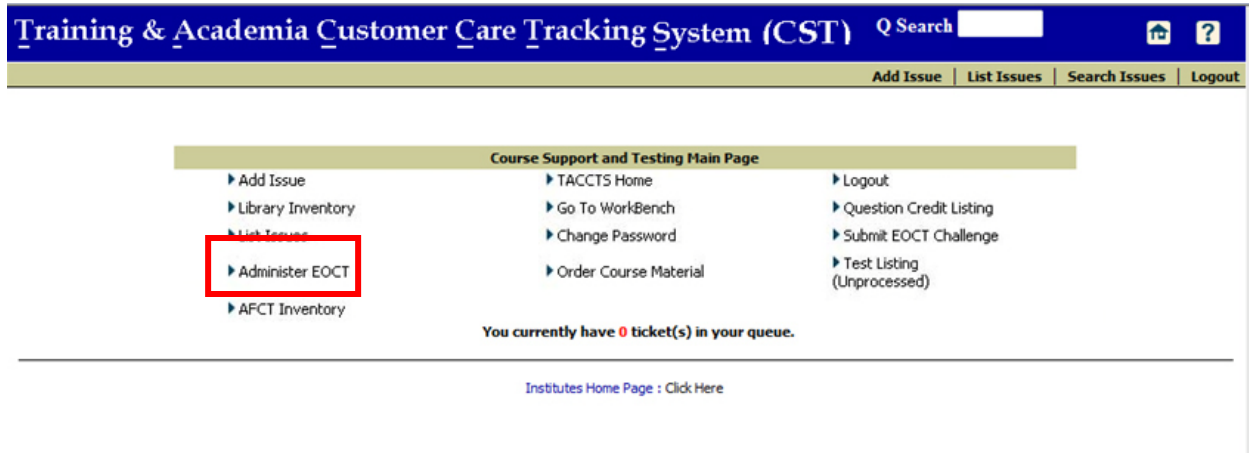
▶ Add Issue	▶ TACCTS Home	▶ Logout
▶ Library Inventory	▶ Go To WorkBench	▶ Question Credit Listing
▶ List Issues	▶ Change Password	▶ Submit EOCT Challenge
▶ Administer EOCT	▶ Order Course Material	▶ Test Listing (Unprocessed)
▶ AFCT Inventory		

You currently have 0 ticket(s) in your queue.

[Institutes Home Page : Click Here](#)

- Click in the “**Q Search**” text box.
- Type in the case ID number.
- Press “**Enter**” on keyboard.
- The ticket will display.

Note: This quick search is by case ID only!

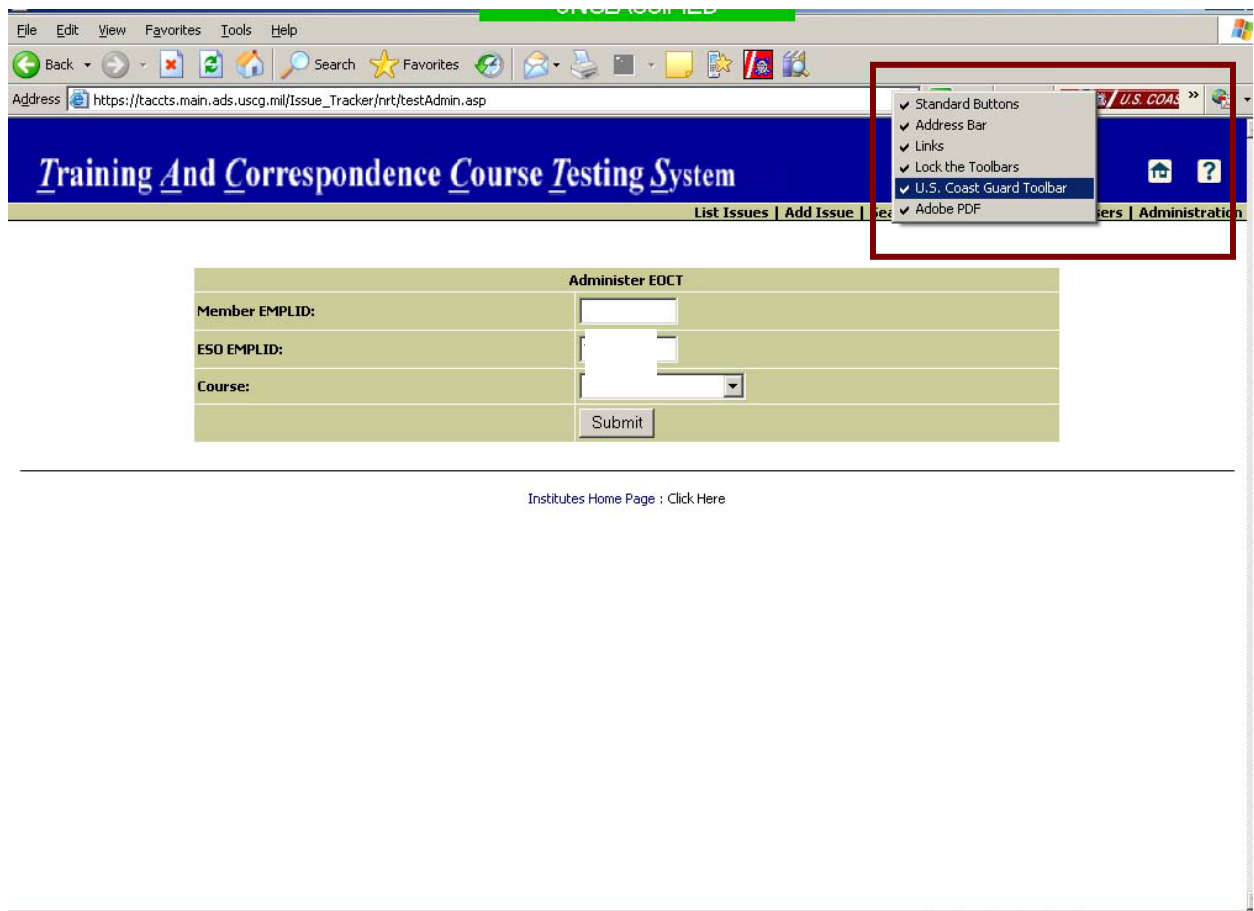


- Click on “**Administer EOCT**” to administer an EOCT to a member. (Library Units only)
 - This is a link to the TACCTS EOCT answer sheet.

Continued on next page.

Administer EOCT (Continued)

Section 2 TACCTS Procedures



The screenshot shows a web browser window with the address bar displaying https://taccts.main.ads.uscg.mil/Issue_Tracker/nrt/testAdmin.asp. The page title is "Training And Correspondence Course Testing System". A red square highlights a context menu over the "U.S. COAST GUARD" banner. The menu items are: Standard Buttons, Address Bar, Links, Lock the Toolbars, U.S. Coast Guard Toolbar (checked), and Adobe PDF. Below the banner is the "Administer EOCT" form with fields for Member EMPLID, ESO EMPLID, and Course, and a Submit button.

Ask Richard

- The first step when administering a test is to disable the Coast Guard Toolbar. **VERY IMPORTANT! Make sure the toolbar is disabled every time a test is administered.** This step will clear the answer sheet. Right click on the toolbar (Coast Guard Banner). (see red square above)
 - Click “**US Coast Guard Toolbar**” to uncheck it.
 - It should no longer be visible.
- Type in “**Member EMPLID**”.
- The “**ESO EMPLID**” will default to the ESO that is administering the test.
- Use drop down menu to select the “**Course**” for the test the member is taking.
- Click on “**Submit**”

Continued on next page.



- Read the EPQ acknowledgement statement.
 - Click on “**Ok**” if you have verified the member has been signed off on their EPQ’s.
- This will open the EOCT answer sheet.
 - Click on “**Cancel**” if you have not verified the member has been signed off on their EPQ’s.
 - Do not administer EOCT until this has been verified.
 - This screen cannot be bypassed.

Continued on next page.

Administer EOCT (Continued)

Section 2 TACCTS Procedures

Testing Information			
YN2 EOCT Test			
Member EMPLID:	1234567	Member Name:	JOE COASTIE
Member OPFAC:	7162100	Member Rank:	YN3
ESO EMPLID:	9999999	Member Status:	Active
Course:	0276	Member Email:	joe.coastie@uscg.mil
Edition:	1	ESO Email:	eso.coastie@uscg.mil
Last EOCT Taken:	N/A	Test Date:	5/6/2009
Test Form:	51		

1. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	8. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	15. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	22. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
2. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	9. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	16. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	23. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
3. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	10. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	17. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	24. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
4. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	11. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	18. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	25. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
5. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	12. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	19. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	
6. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	13. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	20. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	
7. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	14. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	21. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	
<input type="button" value="Clear Answer Sheet"/>			
<input type="button" value="Submit"/>			

Note: when the answer sheet is opened, if there are answers already selected, click on “**Clear Answer Sheet**”.

- Ensure that the member’s **EMPLID, ATU/OPFAC, Course Code, and Course Edition, Name, Rank, Member Email and Test Date** is correct. (Test date and email address can be modified)
- If any of the member’s personal information is incorrect, postpone the exam and contact the CGI CST Div.
- “**Last Test Taken**” is to verify the last test the member took so that the same test will not be administered twice.
- Use the drop down menu to select the “**Test Form**” #. **IMPORTANT!!!!**

(instructions continued on next page)

Continued on next page.

Administer EOCT (Continued)

Section 2 TACCTS Procedures

Testing Information			
YN2 EOCT Test			
Member EMPLID:	1234567	Member Name:	JOE COASTIE
Member OPFAC:	7162100	Member Rank:	YN3
ESO EMPLID:	9999999	Member Status:	Active
Course:	0276	Member Email:	joe.coastie@uscg.mil
Edition:	1	ESO Email:	eso.coastie@uscg.mil
Last EOCT Taken:	N/A	Test Date:	5/6/2009
Test Form:	51		

1. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	8. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	15. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	22. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
2. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	9. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	16. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	23. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
3. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	10. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	17. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	24. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
4. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	11. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	18. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	25. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>
5. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	12. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	19. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	
6. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	13. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	20. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	
7. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	14. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	21. A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/>	
Clear Answer Sheet			
Submit			

Note: if the “D” bubble is wrapped to the next line. click on “View”, “Text Size”, “Smallest”, by doing this the bubble’s A-D will be on the same line.

- Administer Test.
- Click on “**Submit**”.

Continued on next page.

Administer EOCT (Continued)

Section 2 TACCTS Procedures

Testing Information			
Member EMPLID:	Member Name:	Member OPFAC:	Member Rank:
ESO EMPLID:	Member Status:	Course:	Edition:
Test Version:	Admin Date:	Submission Date:	Transaction:
Answer Key			

1. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	9. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	17. A <input checked="" type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input type="radio"/>	25. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>
2. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	10. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	18. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	26. A <input checked="" type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input type="radio"/>
3. A <input checked="" type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input type="radio"/>	11. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	19. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	27. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>
4. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	12. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	20. A <input checked="" type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input type="radio"/>	28. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>
5. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	13. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	21. A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input checked="" type="radio"/>	29. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>
6. A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input checked="" type="radio"/>	14. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	22. A <input type="radio"/> B <input checked="" type="radio"/> C <input type="radio"/> D <input type="radio"/>	30. A <input checked="" type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input type="radio"/>
7. A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input checked="" type="radio"/>	15. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	23. A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input checked="" type="radio"/>	
8. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	16. A <input type="radio"/> B <input type="radio"/> C <input checked="" type="radio"/> D <input type="radio"/>	24. A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D <input checked="" type="radio"/>	
Please print a copy of this test summary page for your records.			

- Print a copy of the test summary page for your records. **IMPORTANT!**
- TACCTS will generate an email to the ESO and Member with the unofficial results. Official results should be posted in to DA within one week of test admin. date.
- To administer another test:
 - Use the “Go Back” link (above) after submitting the test. **DO NOT USE THE BROWSER BACK BUTTON!**

Note: After an ESO submits an EOCT, if CST has to make a change due to an incorrect submission (test form for example), an updated email will be sent to the ESO and member.

Administer EOCT for Auxiliary Member

Section 2 TACCTS Procedures

Training & Academia Customer Care Tracking System (CST) Q Search

Add Issue | List Issues | Search Issues | Logout

Course Support and Testing Main Page

- ▶ Add Issue
- ▶ Library Inventory
- ▶ List Issues
- ▶ Administer EOCT
- ▶ AFCT Inventory
- ▶ TACCTS Home
- ▶ Go To WorkBench
- ▶ Change Password
- ▶ Order Course Material
- ▶ Logout
- ▶ Question Credit Listing
- ▶ Submit EOCT Challenge
- ▶ Test Listing (Unprocessed)

You currently have 0 ticket(s) in your queue.

Institutes Home Page : [Click Here](#)

- **For Auxiliary:** Before you can administer a test to an Auxiliary member you must first submit a TACCTS ticket to the CST Div. requesting that a student record be created for an Auxiliary member. Include the Auxiliary members “**Name, SSN, Mailing Address, EMPLID (Auxiliary Number), OPFAC and Unit**”. Once the TACCTS ticket is resolved by the CGI then the ESO can administer test for that member.
- DO NOT USE THE ONLINE ANSWER SHEET for Auxiliary tests! All Auxiliary tests must use the 2800 paper answer sheet. Scan the sheet, an upload as an attachment in TACCTS to submit to be scored.
- You can submit the information to create the student record and the actual scanned answer sheet at the same time. However the test will take 2-3 days longer to score as a student record will have to be created before the test can be scored.
- Click on “**Add Issue**”

Continued on next page.

Administer EOCT for Auxiliary Member (Continued)

Section 2 TACCTS Procedures

The screenshot shows a web form titled "Add New Issue". The fields are as follows:

- Issue Name:** Joe Coastie
- Member Identifier:** blank
- Description:** AUX MEMBER INFORMATION LOAD
- Comments:** Emplid, SSN, ESO OPFAC, complete mailing address, course name, course code, attach scanned 2800. A character count shows "858 characters left".
- Attachments:** Attachment 1: Add a file (Browse...)
- Submitted By:** JAMIE HUBBLE
- Assigned To:** Course Support and Testing
- Request Date:** 4/21/2010
- Status:** Open
- Priority:** Normal

A "Submit" button is located at the bottom left of the form.

- **Issue Name-** Enter the Auxiliary member's name.
- **Member Identifier-** Leave Blank
- **Description-** Click on drop down menu and select "AUX MEMBER INFORMATION LOAD".
- **Comments-** Aux member EMPLID, SSN, ESO OPFAC, complete mailing address, course name and course code.
- **Attachment –** attach the 2800 scanned answer sheet.
- **Submitted By-** This field will automatically default to the current ESO's name (your name).
- **Assigned to-** This field will automatically default to "Course Support and Testing".
- **Request Date-** This field will automatically default to today's date.
- **Status-** This field will automatically default to "Open". (When a ticket is submitted it will be considered an open ticket until the CST Div. addresses the issue.)
- **Priority-** Click on the drop down menu to select the priority of the issue.
- Click on "Submit" to submit the issue to CST Div.
- It can take up to 3 days for the CST department to load the Aux member's information and grade test.
- A "Course Completion Letter" or "Failure Letter" will be emailed to the ESO who administered the exam. It is the responsibility of the ESO to deliver the results to the Aux member.

Welcome JAMIE HUBBLE
You have 40 days left until your inventory expires.

Choose Department

- ▶ **Course Support and Testing**
- ▶ Voluntary Education
- ▶ Submit a Suggestion
- ▶ User Query Maintenance
- ▶ Tuition Assistance and Grants
- ▶ System Change Listing
- ▶ Member Advising Notes

- Click on “**Course Support and Testing**”

Course Support and Testing Main Page

- ▶ **Add Issue**
- ▶ Library Inventory
- ▶ List Issues
- ▶ Administer EOCT
- ▶ AFCT Inventory
- ▶ TACCTS Home
- ▶ Go To WorkBench
- ▶ Change Password
- ▶ Order Course Material
- ▶ Logout
- ▶ Question Credit Listing
- ▶ Submit EOCT Challenge
- ▶ Test Listing (Unprocessed)

You currently have 0 ticket(s) in your queue.

- Click on “**Add Issue**”

Continued on next page.

Order EOCT for Library Units (Continued)

Section 2 TACCTS Procedures

Add New Issue

Issue Name: BM1-0112-2, SK1-0148-2 (SOP Test)

Member Identifier:

Description: ORDER TESTS FOR LIBRARY UNIT

Comments: Boatswain's Mate, First Class 0112-2
Storekeeper, First Class 0148-2
Unit OPFAC Number
Coast Guard Institute
5900 SW 64th, Oklahoma City, OK. 73169

Attachments: Attachment 1: Browse...
Add a file

Submitted By: JAMIE HUBBLE

Assigned To: Course Support and Testing

Request Date: 4/26/2010

Status: Open

Priority: Normal

Submit

- **Issue Name**- short name of course test is for, Course Code, Course Edition (i.e.: BM1 0112-2)
- **Member Identifier**- ESOs EMPLID
- **Description**- Click on drop down menu and select “**Order Tests for Library Unit**”.
- **Comments**- Long name of course test is for, Course Code, Course Edition. (You may request more than one exam in the same ticket.) Unit OPFAC & physical mailing address (no PO Boxes)
- **Submitted By**- This field will automatically default to the current ESO’s name (your name).
- **Assigned to**- This field will automatically default to “**Course Support and Testing**”.
- **Request Date**- This field will automatically default to today’s date.
- **Status**- This field will automatically default to “**Open**”. (When a ticket is submitted it will be considered an open ticket until the CST Div. addresses the issue.)
- **Priority**- This field will default to “**Normal**” or Click on the drop down menu to select the priority of the issue.
- Click on “**Submit**” to submit the issue to CST Div.
- The CST Div. will mail test to the ESO via FedEx. One copy of each version (ie..#51, #52, #53) of the test is placed in a double envelope with an orange “FOR ESO ONLY” sticker on the internal envelope. The FedEx label is applied to the outer envelope.
- CST changes the TACCTS ticket status to “**Pending Notification of Receipt**” and adds the FedEx tracking number in the comments section.
- Ticket remains open pending response from ESO.

Continued on next page.

Order EOCT for Library Units (Continued)

Section 2 TACCTS Procedures

List Results							
Case ID :	Name:	Description:	Priority	Assigned to:	Date:	Status:	Last Modified:
101691	BM1-0112-2, SK1-0148-2 (SOP Test)	ORDER TESTS FOR LIBRARY UNIT	Normal	CGI61	4/26/2010 12:25:29 PM	Pending Notification of Receipt	4/26/2010 12:30:57 PM

You are now viewing records 1 through 1 out of 1 records.

<< Back || Next >> || Last Page >>

[View All](#)

Note: Do not open a new issue. Respond in the currently open ticket in which you requested the exam. This ensures a historical record of the transaction and allows the CGI to reference both shipment and receipt.

- o Once the ESO receives the test(s):
 - Open package and verifies that contents are correct.
 - Open active TACCTS ticket.
 - Go to “**List Issues**”.
 - Locate Ticket.
 - Double click on ticket to open.

If ESO does not receive test(s) see instructions at the end of “Order Test for Library Unit Section”

To request a status update, click on the Assigned to Section.

Case ID:	101691
Issue Name:	BM1-0112-2, SK1-0148-2 (SOP Test)
Member Identifier:	
Member Name:	
Description:	ORDER TESTS FOR LIBRARY UNIT
Submitted by:	
Assigned to:	Course Support and Testing
Tech Assigned:	CGI61
Request Date:	4/26/2010 12:25:29 PM
Status:	Pending Notification of Receipt
Priority:	Normal
Date Resolved:	
Resolution:	
Attachments:	no attachments

Add Comment **Print Issue**

Comments:	Date:	Comment By:
TACCTS ticket will be closed Pending Notification of Receipt. Fed Ex Tracking Number 7934 8111 4147	4/26/2010 12:30:57 PM	CGI61
Boatswain's Mate, First Class 0112-2 Storekeeper, First Class 0148-2 Unit OPFAC Number Coast Guard Institute 5900 SW 64th, Oklahoma City, OK. 73169	4/26/2010 12:25:31 PM	JAMIE HUBBLE
Ticket Creation	4/26/2010 12:25:29 PM	System

- o Click on “**Add Comment**”.

Continued on next page.

Order EOCT for Library Units (Continued)

Section 2 TACCTS Procedures

Modify Issue (Add Comment)

Case ID:	101691
Issue Name:	Notification of receipt
Member Identifier:	
Member Name:	
Description:	ORDER TESTS FOR LIBRARY UNIT
Submitted By:	
Assigned To:	Course Support and Testing
Technician Assigned:	CGI61
Submit Date :	4/26/2010 12:25:29 PM
Status:	Pending Notification of Receipt
Priority:	Normal
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Previous Attachments:	no attachments
Comments:	Test (s) recieved 984 characters left

Comments:	Date:	Comment By:
TACCTS ticket will be closed Pending Notification of Receipt. Fed Ex Tracking Number 7934 8111 4147	4/26/2010 12:30:57 PM	CGI61
Boatswain's Mate, First Class 0112-2 Storekeeper, First Class 0148-2 Unit OPFAC Number Coast Guard Institute 5900 SW 64th, Oklahoma City, OK. 73169	4/26/2010 12:25:31 PM	JAMIE HUBBLE
Ticket Creation	4/26/2010 12:25:29 PM	System

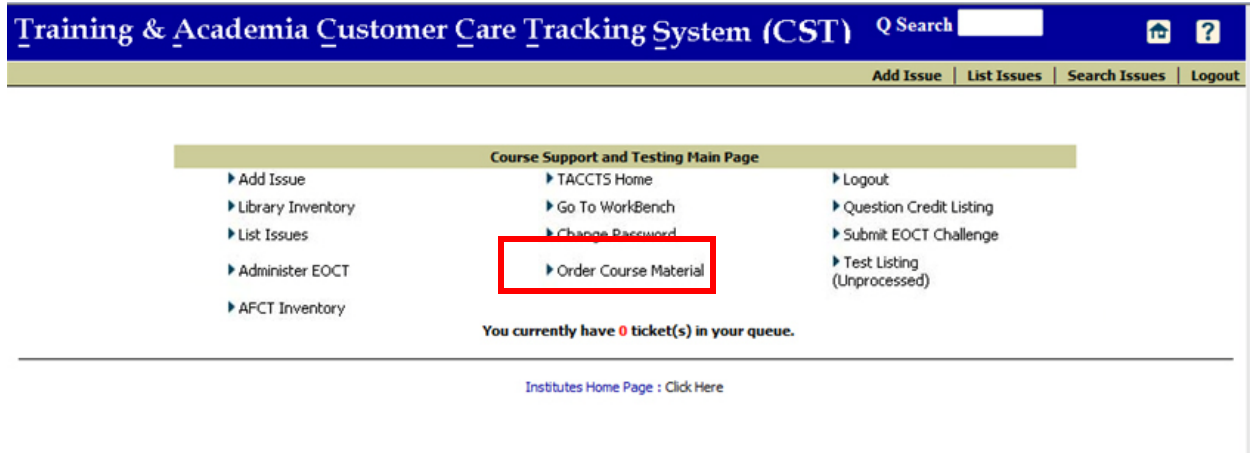
- Change Issue Name to “**Notification of Receipt**”
- Enter in the comment section “**Tests received**”.
- Click on “**Update**”.
- Once CST receives notification from ESO that tests have been received, CST adds tests to the unit’s TACCTS inventory and closes ticket.

ESO does not receive tests

- ESO checks FedEx site with tracking number for delivery information.
- If FedEx confirms delivery, ESO checks who signed for the package and attempts to track its location.
- If unable to locate, ESO should notify CST IMMEDIATELY via TACCTS of possible compromise.
- If delivery is not confirmed by FedEx, ESO should notify CST via TACCTS that the package was not delivered.

Order Course Material/Training Videos and EOCT for Non-Library Units

Section 2 TACCTS Procedures



BACK

- Click on **“Order Course Order”** to enroll in a course, order an EOCT or to order course material only, w/out enrolling in the course.

Continued on next page.

Order Course Material/Training Videos and EOCT for Non-Library Units (Continued)

Section 2 TACCTS Procedures

Course Order Request	
EMPLID Where Order Is To Be Mailed:	<input type="text" value="123456"/>
ESO EMPLID:	<input type="text" value="9999999"/>
Course:	<div style="border: 1px solid black; padding: 2px;"><div style="text-align: right;">▼</div>0140 – (PA1) 0240 – (PA2) 0368 – (PS3 PQ) 2600 – (PSUESH) 0431 – (SARFND) <small>Institute</small> 0348 – (SK3) 0705 – (SNAID) 0652 – (TCTSG) 0176 – (YN1) 0276 – (YN2) 0376 – (YN3)<div style="text-align: left;">▲</div></div>

- **“EMPLID Where Order is to be mailed”** – if the course is for a specific member, enter the member's EMPLID. If the course is for an ESO's library then enter the ESO's EMPLID. This field pulls the shipping address from the EMPLID entered to generate the mail label. This field is for whoever the course will be mailed to.
- **“ESO EMPLID”** - will automatically default to the ESO ordering the course.
- **“Course”** - Use the drop down menu to select the desired course.
- Click on **“Submit”**.

Continued on next page.

Order Course Material/Training Videos and EOCT for Non-Library Units (Continued)

Section 2 TACCTS Procedures

Member OPFAC:	7162100	Member Rank:	YN3
ESO EMPLID:	9999999	Member Status:	Active
Course:	0376	Member Email:	
Edition:	1	ESO Email:	

Previous Orders

Transaction ID:	Course:	Edition:	ESO EMPLID:	Date:
3178051	0376	1		1/14/2008 1:43:00 PM

Order Type

Unit: U.S. COAST GUARD INSTITUT

Address: 5900 SW 64TH ST RM 235

City: OKLAHOMA CITY

State: OK

Zip Code: 731696999

Order Type dropdown menu (red circle):

- Course Enrollment
- Course Enrollment with Test
- Course Material Only

Test Material Shipping Address:

Unit: US COAST GUARD INSTITUTE

- Verify the member and ESO’s email address is correct. (see black square)
 - If it is not, select the email address that is incorrect.
 - Type in the correct email address.
- Use the **drop down arrow** (see red circle) to select the “**Reason for Submission**”
- If you are ordering a course, verify the “**Course Material Shipping Address**”. This address can be modified if needed.
- If you are ordering a test, verify the “**Test Material Shipping Address**”. This address cannot be modified. All test must be sent to the ESO, if the ESO’s address is incorrect, please notify the CST Div.
- Click on “**Submit**”.

Continued on next page.

Order Course Material/Training Videos and EOCT for Non-Library Units (Continued)

Section 2 TACCTS Procedures



- To order a training video for a member/unit:
 - Click on **“Video Order”**.

The screenshot shows a form titled "Video Order Request". The "ESO EMPLID:" field contains the value "9999999". The "Course:" field is a dropdown menu with a list of video titles. The selected item is "0807 - (TQM (DVD))".

ESO EMPLID:	9999999
Course:	0802 - (HYPOTHERMIA (DVD)) 0803 - (PREMOB (DVD)) 0804 - (BELIEVE (DVD)) 0805 - (ASSIST (DVD)) 0807 - (TQM (DVD)) 0809 - (ONLINE ALL THE TIME (DVD)) 0810 - (UCMJ (DVD)) 0811 - (VOICES (DVD)) 0812 - (FIRST 72 HOURS (DVD)) 0813 - (PROFILE OF A USCG AFRICAN AMERICAN (DVD))

- The **“ESO EMPLID”** will default to the ESO’s ordering the video.
- Use the drop down menu to select the desired video.
- Click on **“Submit”**.

Continued on next page.

Order Course Material/Training Videos and EOCT for Non-Library Units (Continued)

Section 2 TACCTS Procedures

Order Details			
Member EMPLID:	<input type="text"/>	Member Name:	<input type="text"/>
Member OPFAC:	7162100	Member Rank:	YN3
ESO EMPLID:	<input type="text"/>	Member Status:	Active
Course:	0805	ESO Email:	@uscg.mil

Previous Orders

Transaction ID:	Course:	Edition:	ESO EMPLID:	Date:
3178051	0376	1		1/14/2008 1:43:00 PM

Order Type

Video Enrollment

Course Material Shipping Address:

Unit:

Address:

City:

State:

Zip Code:

- Verify the information on this screen.
- The shipping address can be changed.
- Click on “**Submit**”.

Welcome JAMIE HUBBLE
You have 40 days left until your inventory expires.

Choose Department

- ▶ **Course Support and Testing**
- ▶ Voluntary Education
- ▶ Submit a Suggestion
- ▶ User Query Maintenance
- ▶ Tuition Assistance and Grants
- ▶ System Change Listing
- ▶ Member Advising Notes

Note: Library units can destroy EOCT locally if test become obsolete or are no longer needed at the unit by using a cross-cut shredder. Once the obsolete test is destroyed, please report the destruction of the test to the CGI CST Div. via TACCTS.

- Log into **TACCTS**.
- Click on “**Course Support and Testing**”.

Course Support and Testing Main Page

- ▶ **Add Issue**
- ▶ Library Inventory
- ▶ List Issues
- ▶ Administer EOCT
- ▶ AFCT Inventory
- ▶ TACCTS Home
- ▶ Go To WorkBench
- ▶ Change Password
- ▶ Order Course Material
- ▶ Logout
- ▶ Question Credit Listing
- ▶ Submit EOCT Challenge
- ▶ Test Listing (Unprocessed)

You currently have 0 ticket(s) in your queue.

- Click on “**Add Issue**”

Continued on next page.

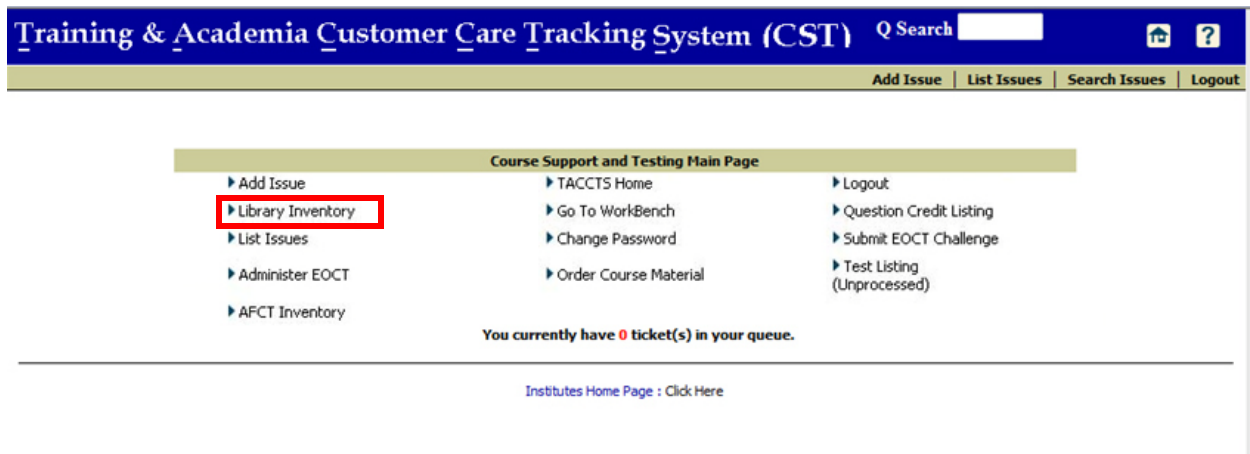
Destruction of EOCT (Continued)

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	BM1-0112-2
Member Identifier:	
Description:	DESTRUCTION OF EOCT'S
Comments:	Boatswains's Mate, First Class 0112-2 test # 51, #52, #53 destroyed by cross-cut shredder on todays date. left 894 characters
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Submitted By:	JAMIE HUBBLE
Assigned To:	Course Support and Testing
Request Date:	4/27/2010
Status:	Open
Priority:	Normal
<input type="button" value="Submit"/>	

- **Issue Name**- Short name, Course Code, Course Edition and test # (i.e.: BM1 0112-2 #51,#52,#53).
- **Member Identifier**- ESOs EMPLID
- **Description**- Click on drop down menu and select “**Destruction of EOCT’s**”.
- **Comments**- Long name of test, Course Code, Course Edition, Test #'s and statement confirming destruction.
- **Submitted By**- This field will automatically default to the current ESO’s name (your name).
- **Assigned to**- This field will automatically default to “**Course Support and Testing**”.
- **Request Date**- This field will automatically default to today’s date.
- **Status**- This field will automatically default to “**Open**”. (When a ticket is submitted it will be considered an open ticket until the CST Div. addresses the issue.)
- **Priority**- This field will default to “**Normal**” or Click on the drop down menu to select the priority of the issue.
- Click on “**Submit**” to submit the issue to CST Div.
- Once destruction notification has been received via TACCTS, CST will remove the tests from the Unit’s TACCTS inventory.

EOCT Inventory It is required for the ESO’s at library Units to complete an EOCT Inventory once a month, **due by the 5th of each month**. Follow the screen prints step-by-step to conduct the EOCT Inventory.



- Click on “**Library Inventory**”

List Results						
Dept:	OPFAC:	Location:	Description:	Last Inventory Verification:	Verification By:	
▶ (000044)	7162100	OKLAHOMA CITY, OK	CG INSTITUTE	3/18/2007 3:12:06 PM	JAMIE HURBLE	

- Click anywhere in the row of the Library Listing to open inventory.

Note 1: Library Inventory must be verified by the 5th of each month. If your verification date is green it’s been 35 days or less since you last verified your inventory. If your verification date is yellow it’s been 35-45 days since you last verified your inventory. If your verification date is red it’s been over 45 days since you last verified your inventory.

Note 2: If you do not verify your inventory within 40 days of your last verification then your TACCTS account will be locked out. If you have more than one unit under the same DA dept. ID or OPFAC #, all accounts will be locked if all ESO’s under that unit does not verify their inventory.

Continued on next page.

Library Inventory (Continued)

Section 2 TACCTS Procedures

Course Desc :	Course Code :	Course Ed :	Test Form :	Qty On Hand :	Last Adjustment Date :
AST1	0110	1	51	1	8/24/2007 2:16:24 PM
AST1	0110	1	52	2	8/24/2007 2:16:24 PM
AST1	0110	1	53	2	8/24/2007 2:16:24 PM
BM1	0112	1	51	1	8/24/2007 2:16:24 PM
BM1	0112	1	52	1	8/24/2007 2:16:24 PM
BM1	0112	1	53	1	8/24/2007 2:16:24 PM
DC1	0116	1	51	1	8/24/2007 2:16:24 PM
DC1	0116	1	52	1	8/24/2007 2:16:24 PM
DC1	0116	1	53	1	8/28/2007 8:34:15 AM
EM1	0119	8	51	1	8/28/2007 8:36:20 AM
ET1	0122	2	51	1	8/28/2007 8:25:35 AM
ET1	0122	2	53	1	8/28/2007 8:37:19 AM
GM1	0129	8	51	1	8/28/2007 8:37:19 AM
DWNTNTR	0702	1	65	1	8/28/2007 8:36:02 AM
EPME 8	0862	1	51	1	8/24/2007 2:16:24 PM
EPME 8	0862	1	52	1	8/24/2007 2:16:24 PM
EPME 8	0862	1	53	1	8/28/2007 8:33:45 AM
EPME 8	0862	1	54	1	8/28/2007 8:30:17 AM
EPME 8	0862	1	55	1	8/28/2007 8:27:39 AM
EPME 8	0862	1	56	7	8/24/2007 2:17:26 PM
Submit New Case		Submit Inventory Verification			

- Compare all the EOCT the unit has on hand in the safe, to the CGI inventory list on this page.
- If there is any discrepancies:
 - Click on “**Submit Inventory Verification**” and then,
 - Click on “**Submit New Case**” to report the discrepancy to the CST Div. at the CGI. (more instructions on the following page)
 - If “**Submit Inventory Verification**” option is not clicked, then you will get locked out on the 10th.
- If there are no discrepancies:
 - Click on “**Submit Inventory Verification**” – this will document the time and date the inventory was verified every month.

Continued on next page.

Add New Issue

Issue Name: Inv. Adj for Optec: 7162100 DA Dept 000044

Member Identifier:

Description: INCORRECT LIBRARY/INVENTORY

Comments: TACCTS shows 3 MK1 I only have 2.
(* 1000 Char. Limit *)

Attachments: Attachment 1: Browse...
Add a file

Submitted By:

Assigned To: Course Support and Testing

Request Dates: 8/27/2007

Status: Open

Priority: Normal

Submit

- This is the “**Add New Issue**” screen.
 - Type in comments specific to the inventory issue.

Example: TACCTS inventory shows three MK1, I have two MK1 on hand.

- All other fields will default to the correct information.
- Click on “**Submit**”

Continued on next page.

Library Inventory (Continued)

Section 2 TACCTS Procedures

List Results						
Case ID:	Name:	Description:	Priority:	Assigned to:	Date:	Status:
2806	TEST do not delete please	A-SCHOOL ENTRY	Normal	CGI53	11/2/2007 8:41:01 AM	Open
2810	Johnathon Toy please do not delete	COURSE MATERIAL NOT RECEIVED	Normal	CGI53	11/2/2007 8:47:53 AM	Open
2818	Johnathon Toy please do not delete	SI-DIAGNOSIS REQUEST	Normal	CGI53	11/2/2007 8:56:18 AM	Open
2821	Inv. Adj. for Opfac: 7162100 DA Dept: 000044	INCORRECT LIBRARY INVENTORY	Normal		11/2/2007 10:19:23 AM	Open

[Institutes Home Page : Click Here](#)

- This ticket will now show up in the ESO’s “**List Issues**” screen.
- Double click anywhere in the row of the ticket to open ticket and to review and respond to CGI comments.

To request a status update, click on the Assigned to Section.

Case ID: 2821
 Issue Name: Inv. Adj. for Opfac: 7162100 DA Dept: 000044
 Member Identifier:
 Member Name:
 Description: INCORRECT LIBRARY INVENTORY
 Submitted by:
 Assigned to: Course Support and Testing
 Tech Assigned:
 Request Date: 11/2/2007 10:19:23 AM
 Status: Open
 Priority: Normal
 Date Resolved:
 Resolution:

Add Comment | Print Issue

Comments:	Date:	Comment By:
test do not delete, i know im putting a lot of test in sorry.	11/2/2007 10:19:23 AM	JAMIE HUBBLE
Ticket Creation	11/2/2007 10:19:23 AM	System

- Click on “**Add Comment**” to reply to CGI comment.

Continued on next page.

Library Inventory (Continued)

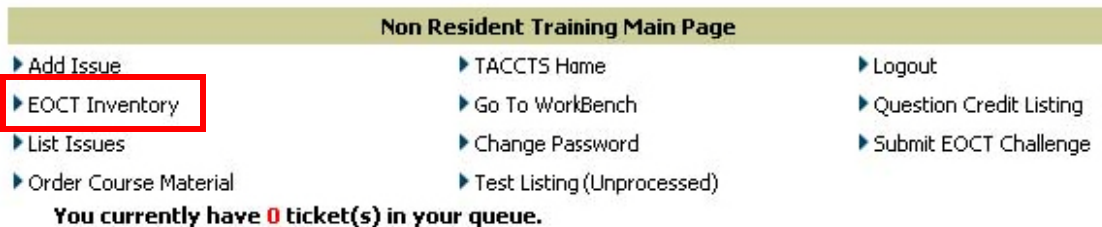
Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	<input type="text" value="Inv. Adj. for Opfac: 7162100 DA Dept: 000044"/>
Member Identifier:	<input type="text" value="9999999"/>
Description:	<input type="text" value="INCORRECT LIBRARY INVENTORY"/>
Comments: <small>(* 1000 Char. Limit *)</small>	<input type="text"/>
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Submitted By:	<input type="text"/>
Assigned To:	<input type="text" value="Course Support and Testing"/>
Request Date:	<input type="text" value="7/21/2008"/>
Status:	<input type="text" value="Open"/>
Priority:	<input type="text" value="Normal"/>
<input type="button" value="Submit"/>	

- Type in the response to the CGI.
- Click on **“Update”**
- This will generate an email to the CGI, notifying them of the update.

Note: Once the issue is resolved the ticket will no longer show up on the “List Issues” screen.

EOCT Inventory It is required for the ESO’s at non-library units to complete an EOCT Inventory once a month, **due by the 5th of each month**. Follow the screen prints step-by-step to conduct the EOCT Inventory.



- Click on “EOCT Inventory”



- Click anywhere in the row of the listing to open inventory.

Note 1: Non-Library Inventory must be verified by the 5th of each month. If your verification date is green it’s been 35 days or less since you last verified your inventory. If your verification date is yellow it’s been 35-45 days since you last verified your inventory. If your verification date is red it’s been over 45 days since you last verified your inventory.

Note 2: If you do not verify your inventory within 40 days of your last verification then your TACCTS account will be locked out. If you have more than one unit under the same DA dept. ID or OPFAC #, all accounts will be locked if all ESO’s under that unit does not verify their inventory.

Continued on next page.

Non-Library Inventory (Continued)

Section 2 TACCTS Procedures

Course Desc :	Course Code :	Course Ed :	Test Form :	Mail Date :	Member Name :	Enrollment Number :
DC1	0116	1	51	6/21/2006		888551
PS3	0351	5	51	7/24/2006		891654
PA1	0140	1	51	6/14/2006		887818
Submit New Case		Submit Inventory Verification				

- Compare all the EOCT the unit has on hand in the safe, to the CGI inventory list on this page.
- If there is any discrepancies:
 - Click on “**Submit Inventory Verification**” and then,
 - Click on “**Submit New Case**” to report the discrepancy to the CST Div. at the CGI. (more instructions on the following page)
 - If “**Submit Inventory Verification**” option is not clicked, then you will get locked out on the 10th.
- If there are no discrepancies:
 - Click on “**Submit Inventory Verification**” – this will document the time and date the inventory was verified every month.

Continued on next page.

Non-Library Inventory (Continued)

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	Inv. Adj. for Opfac: 7162100 DA Dept: 000044
Member Identifier:	9999999
Description:	INCORRECT TEST INVENTORY
Comments: (* 1000 Char. Limit *)	I do not have a test for Joe Coastie and my inventory says I do.
Attachments:	Attachment 1: <input type="text"/> Browse... Add a file
Submitted By:	<input type="text"/>
Assigned To:	Course Support and Testing
Request Date:	9/15/2008
Status:	Open
Priority:	Normal
<input type="button" value="Submit"/>	

- This is the “**Add New Issue**” screen.
 - Type in comments specific to the inventory issue.

Example: TACCTS inventory shows three MK1, I have two MK1 on hand.

- All other fields will default to the correct information.
- Click on “**Submit**”

Continued on next page.

Non-Library Inventory (Continued)

Section 2 TACCTS Procedures

List Results						
Case ID:	Name:	Description:	Priority:	Assigned to:	Date:	Status:
2806	TEST do not delete please	A-SCHOOL ENTRY	Normal	CG253	11/2/2007 8:41:01 AM	Open
2810	johnathon Toy please do not delete	COURSE MATERIAL NOT RECEIVED	Normal	CG253	11/2/2007 8:47:53 AM	Open
2819	johnathon Toy please do not delete	31-DAN WADEN REQUEST	Normal	CG253	11/2/2007 9:00:18 AM	Open
2821	Inv. Adj. for Opfac: 7162100 DA Dept: 000044	INCORRECT LIBRARY INVENTORY	Normal		11/2/2007 10:19:23 AM	Open

[Institutes Home Page : Click Here](#)

- This ticket will now show up in the ESO's "List Issues" screen.
- Double click anywhere in the row of the ticket to open ticket and to review and respond to CGI comments.

To request a status update, click on the Assigned to Section.

Case ID:	2821
Issue Name:	Inv. Adj. for Opfac: 7162100 DA Dept: 000044
Member Identifier:	
Member Name:	
Description:	INCORRECT LIBRARY INVENTORY
Submitted by:	
Assigned to:	Course Support and Testing
Tech Assigned:	
Request Date:	11/2/2007 10:19:23 AM
Status:	Open
Priority:	Normal
Date Resolved:	
Resolution:	

Add Comment | Print Issue

Comments:	Date:	Comment By:
test do not delete. i know im putting a lot of test in sorry.	11/2/2007 10:19:23 AM	JAMIE HUBBLE
Ticket Creation	11/2/2007 10:19:23 AM	System

- Click on "Add Comment" to reply to CGI comment.

Continued on next page.

Non-Library Inventory (Continued)

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	<input type="text" value="Irr. Adj. for Opfac: 7162100 DA Dept: 000044"/>
Member Identifier:	<input type="text" value="9999999"/>
Description:	<input type="text" value="INCORRECT LIBRARY INVENTORY"/>
Comments: (* 1000 Char. Limit *)	<input type="text"/>
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Submitted By:	<input type="text" value="JAMIE HUBBLE"/>
Assigned To:	<input type="text" value="Course Support and Testing"/>
Request Date:	<input type="text" value="7/21/2008"/>
Status:	<input type="text" value="Open"/>
Priority:	<input type="text" value="Normal"/>
<input type="button" value="Submit"/>	

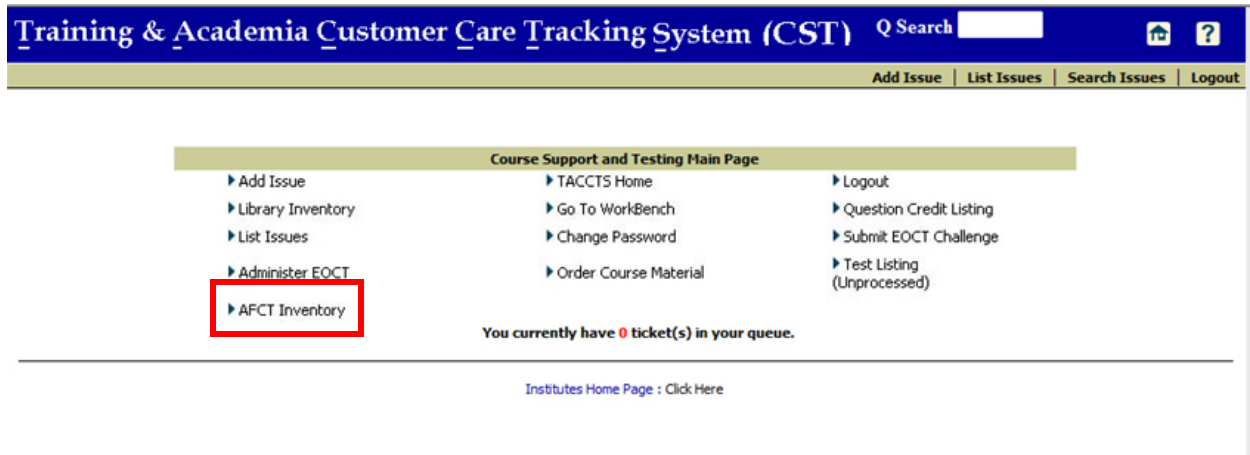
- Type in the response to the CGI.
- Click on **“Update”**
- This will generate an email to the CGI, notifying them of the update.

Note: Once the issue is resolved the ticket will no longer show up on the “List Issues” screen.

Armed Forces Certification Test (AFCT) Inventory

Section 2 TACCTS Procedures

AFCT Inventory It is required for the ESO's who have AFCT libraries to complete an AFCT Inventory once every six months. Follow the screen prints step-by-step to conduct the AFCT Inventory.



- Click on “AFCT Inventory”

Continued on next page.

Armed Forces Certification Test (AFCT) Inventory

Section 2 TACCTS Procedures

OPFAC: 3246900

AFCT Inventory Listing				
Item:	Description:	Serial Number:	Qty:	Action:
ANSWER SHEET	AFCT A/S	100287	1	Mark Administered
ANSWER SHEET	AFCT A/S	100288	1	Mark Administered
ANSWER SHEET	AFCT A/S	100289	1	Mark Administered
ANSWER SHEET	AFCT A/S	100290	1	Mark Administered
ANSWER SHEET	AFCT A/S	100291	1	Mark Administered
ANSWER SHEET	AFCT A/S	100292	1	Mark Administered
ANSWER SHEET	AFCT A/S	100293	1	Mark Administered
ANSWER SHEET	AFCT A/S	100294	1	Mark Administered

- The AFCT Inventory Listing will display.
- Each unit will hold all or some of the following:
 - Answer sheets
 - Score keys
 - Test books
 - Instruction Manual for Administering the test
- As each Answer Sheet is used, the ESO will mark the answer sheet “Administered”.
 - Located the answer sheet that was administered.
 - Click on “**Mark Administered**” (see red square)

Continued on next page.

Test Administration Details	
Member SSN:	<input type="text"/>
OPFAC:	<input type="text" value="3246900"/>
Test Administrator:	<input type="text"/>
Test Date:	<input type="text" value="4/21/2009"/>

Submit

[Institutes Home Page : Click Here](#)

- Type the members SSN the test was administered to, in the “**Member SSN**” field.
- Click on “**Submit**”.

AFCT Test removed from active Inventory.

AFCT Test moved to archive records.

[Go Back](#)

- This message will display.
- Click on “**Go Back**”.

Continued on next page.

Armed Forces Certification Test (AFCT) Inventory

Section 2 TACCTS Procedures

SCORING DIRECTION & CONVERSION TABLES	AFCT CT	000616	1	N/A
--	---------	--------	---	-----

Total Items: 1

Item:	Description:	Serial Number:	Qty:	Action:
TEST BOOK	AFCT18FB	004284	1	N/A
TEST BOOK	AFCT18FB	004285	1	N/A
TEST BOOK	AFCT18FB	004286	1	N/A
TEST BOOK	AFCT19GB	004284	1	N/A
TEST BOOK	AFCT19GB	004285	1	N/A
TEST BOOK	AFCT19GB	004286	1	N/A

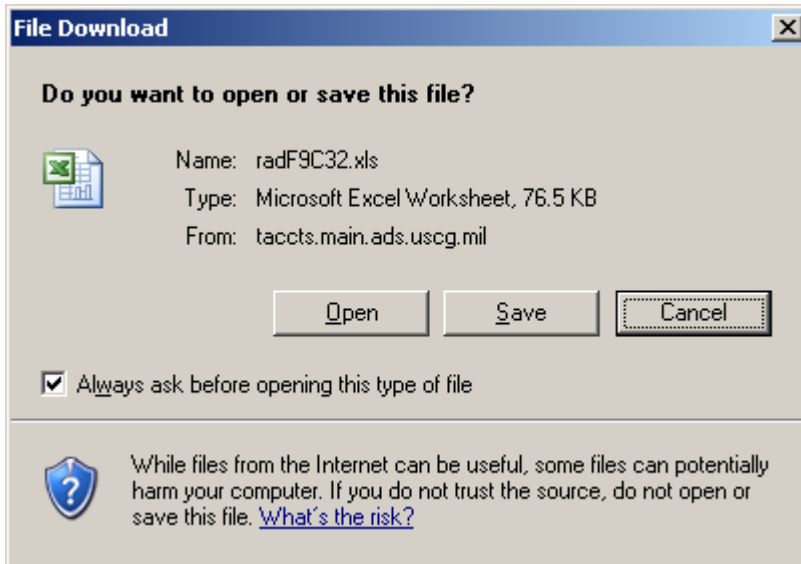
Total Items: 6

Submit Verification	Submit New Case
Answer Sheet Archive	

[Generate Report](#)

- Scroll to the bottom of the page.
- To begin inventory:
 - Click on **“Generate Report”**

Continued on next page.



- Click on “Open”.

Continued on next page.

Armed Forces Certification Test (AFCT) Inventory

Section 2 TACCTS Procedures

	A	B	C	D	E	F	G	H
1	This Document Contains FOUO Information.	AFCT Unit:3246900						
2								
3	Inventory Type	Inventory Descriptio	Inventory Serial Num	Inventory Quanti	Inventory Addition Date			
4	TEST BOOK	AFCT18FB		1	03/23/2009			
5	TEST BOOK	AFCT18FB		1	03/23/2009			
6	TEST BOOK	AFCT18FB		1	03/23/2009			
7	TEST BOOK	AFCT19GB		1	03/23/2009			
8	TEST BOOK	AFCT19GB		1	03/23/2009			
9	TEST BOOK	AFCT19GB		1	03/23/2009			
10	SCORE KEY	AFCT18FK		1	03/23/2009			
11	SCORE KEY	AFCT19GK		1	03/23/2009			
12	ANSWER SHEET	AFCT A/S		1	03/23/2009			
13	ANSWER SHEET	AFCT A/S		1	03/23/2009			
14	ANSWER SHEET	AFCT A/S		1	03/23/2009			
15	ANSWER SHEET	AFCT A/S		1	03/23/2009			
16	ANSWER SHEET	AFCT A/S		1	03/23/2009			
17	ANSWER SHEET	AFCT A/S		1	03/23/2009			
18	ANSWER SHEET	AFCT A/S		1	03/23/2009			
19	ANSWER SHEET	AFCT A/S		1	03/23/2009			
20	ANSWER SHEET	AFCT A/S		1	03/23/2009			
21	ANSWER SHEET	AFCT A/S		1	03/23/2009			
22	ANSWER SHEET	AFCT A/S		1	03/23/2009			
23	ANSWER SHEET	AFCT A/S		1	03/23/2009			
24	ANSWER SHEET	AFCT A/S		1	03/23/2009			
25	ANSWER SHEET	AFCT A/S		1	03/23/2009			
26	ANSWER SHEET	AFCT A/S		1	03/23/2009			
27	ANSWER SHEET	AFCT A/S		1	03/23/2009			
28	ANSWER SHEET	AFCT A/S		1	03/23/2009			
29	ANSWER SHEET	AFCT A/S		1	03/23/2009			
30	ANSWER SHEET	AFCT A/S		1	03/23/2009			
31	ANSWER SHEET	AFCT A/S		1	03/23/2009			
32	ANSWER SHEET	AFCT A/S		1	03/23/2009			
33	ANSWER SHEET	AFCT A/S		1	03/23/2009			
34	ANSWER SHEET	AFCT A/S		1	03/23/2009			

- Your units AFCT inventory that is listed in TACCTS will display on an excel spreadsheet.
- Print this page.
- Compare all the AFCT the unit has on hand in the safe, to the CGI inventory list on this page.

Continued on next page.

Armed Forces Certification Test (AFCT) Inventory

Section 2 TACCTS Procedures

SCORING DIRECTION & CONVERSION TABLES	AFCT CT	000616	1	N/A
--	---------	--------	---	-----

Total Items: 1

Item:	Description:	Serial Number:	Qty:	Action:
TEST BOOK	AFCT18FB	004284	1	N/A
TEST BOOK	AFCT18FB	004285	1	N/A
TEST BOOK	AFCT18FB	004286	1	N/A
TEST BOOK	AFCT19GB	004284	1	N/A
TEST BOOK	AFCT19GB	004285	1	N/A
TEST BOOK	AFCT19GB	004286	1	N/A

Total Items: 6

Submit Verification	Submit New Case
Answer Sheet Archive	

Generate Report

- If there is any discrepancies:
 - Click on “**Submit Inventory Verification**” and then,
 - Click on “**Submit New Case**” to report the discrepancy to the CST Div. at the CGI. (more instructions on the following page)
 - If “**Submit Inventory Verification**” option is not clicked, then you will get locked out..
- If there are no discrepancies:
 - Click on “**Submit Inventory Verification**” – this will document the time and date the inventory was verified every month.

Continued on next page.

Armed Forces Certification Test (AFCT) Inventory

Section 2 TACCTS Procedures

Add New Issue	
Issue Name:	<input type="text" value="AFCT Inv. Adj. for Opfec: 3246900"/>
Member Identifier:	<input type="text"/>
Description:	<input type="text" value="AFCT/ASVAB INVENTORY MAINTENANCE"/>
Comments: (* 1000 Char. Limit *)	<input type="text"/>
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add a file"/>
Submitted By:	<input type="text"/>
Assigned To:	<input type="text" value="Course Support Testing"/>
Request Date:	4/21/2009
Status:	<input type="text" value="Open"/>
Priority:	<input type="text" value="Normal"/>
<input type="button" value="Submit"/>	

- This is the “**Add New Issue**” screen.
 - Type in comments specific to the inventory issue.
 - All other fields will default to the correct information.
 - Click on “**Submit**”

Continued on next page.

List Results							
Case ID:	Name:	Description:	Priority	Assigned to:	Date:	Status:	Last Modified:
54957	AFCT Inv. Adj. for Opfac: 3246900	AFCT/ASVAB INVENTORY MAINTENANCE	Normal		4/21/2009 9:43:10 AM	Open	4/21/2009 9:43:11 AM

You are now viewing records 1 through 1 out of 1 records.

<< Back || Next >> || Last Page >>

[View All](#)

- This ticket will now show up in the ESO’s “**List Issues**” screen.
- Double click anywhere in the row of the ticket to open ticket and to review and respond to CGI comments.

To request a status update, click on the Assigned to Section.

Case ID: 54957
 Issue Name: AFCT Inv. Adj. for Opfac: 3246900
 Member Identifier:
 Member Name:
 Description: AFCT/ASVAB INVENTORY MAINTENANCE
 Submitted by:
 Assigned to: Course Support and Testing
 Tech Assigned:
 Request Date: 4/21/2009 9:43:10 AM
 Status: Open
 Priority: Normal
 Date Resolved:
 Resolution:
 Previous Attachments: no attachments

Add Comment **Print Issue**

Comments:	Date:	Comment By:
This is a test for the SOP, Toy please delete this ticket.	4/21/2009 9:43:11 AM	MARC FAGENBAUM
Ticket Creation	4/21/2009 9:43:10 AM	System

- Click on “**Add Comment**” to reply to CGI comment.

Continued on next page.

Armed Forces Certification Test (AFCT) Inventory

Section 2 TACCTS Procedures

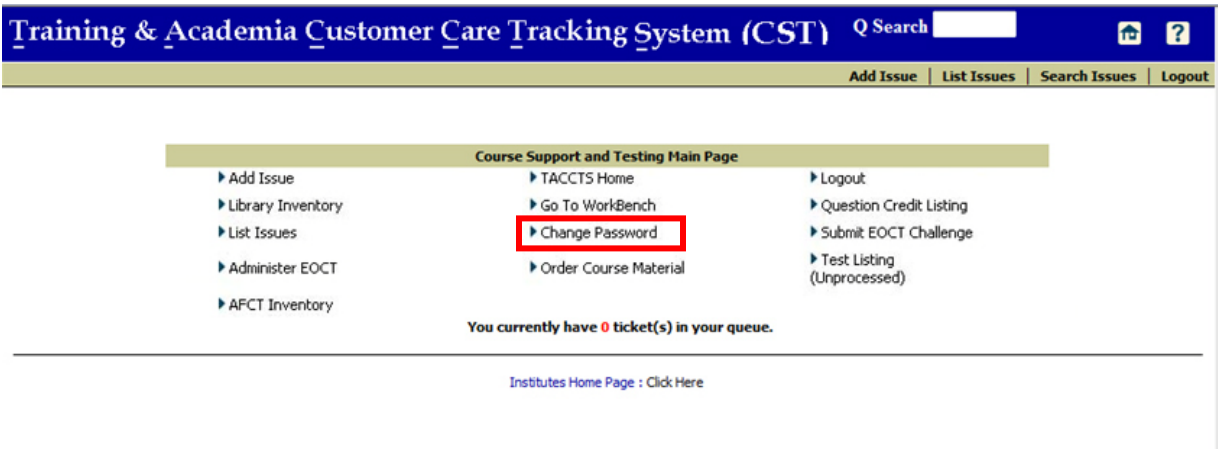
Modify Issue (Add Comment)	
Case ID:	54957
Issue Name:	AFCT Inv. Adj. for Opfac: 3246900
Member Identifier:	<input type="text"/>
Member Name:	<input type="text"/>
Description:	AFCT/ASVAB INVENTORY MAINTENANCE
Submitted By:	<input type="text"/>
Assigned To:	Course Support and Testing
Technician Assigned:	<input type="text"/>
Submit Date :	4/21/2009 9:43:10 AM
Status:	Open
Priority:	Normal
Attachments:	Attachment 1: <input type="text"/> Browse... Add a file
Previous Attachments:	no attachments
Comments:	<input type="text"/>
Update	
Comments:	
	Date:
This is a test for the SOP, Toy please delete this ticket.	4/21/2009 9:43:11 AM
	Comment By:
	MARC FAGENBAUM

- Type in the response to the CGI.
- Click on **“Update”**
- This will generate an email to the CGI, notifying them of the update.

Note: Once the issue is resolved the ticket will no longer show up on the “List Issues” screen.

Change Password

Section 2 TACCTS Procedures



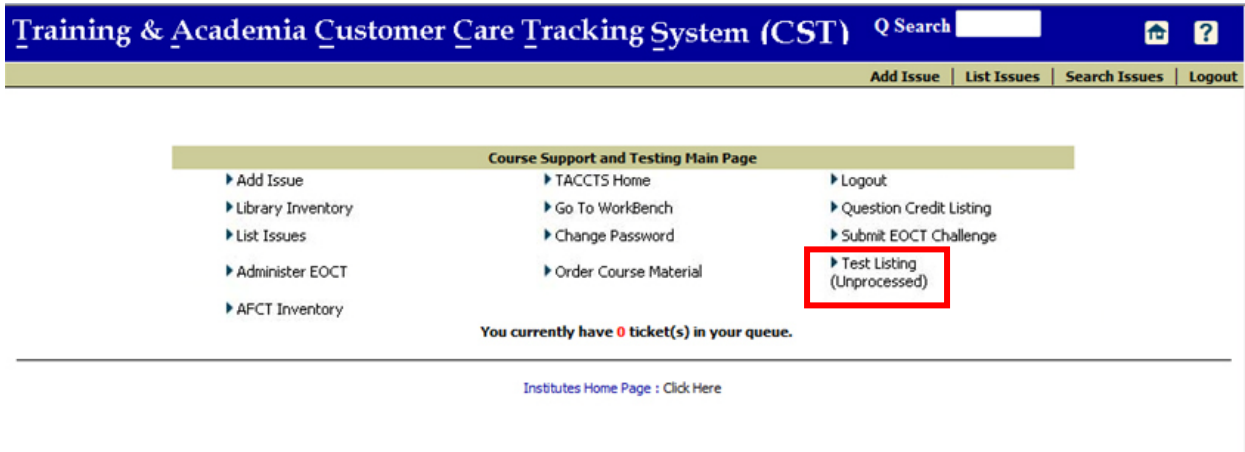
- The ESO can change their TACCTS password at any time if needed.
- Click on “**Change Password**”

Please Choose A New Password :

Password :	<input type="text"/>
Verify Password:	<input type="text"/>
<input type="submit" value="Submit"/>	

Institutes Home Page : [Click Here](#)

- To create a new password:
 - Type in the new password
 - Min 8 characters, Max 15.
 - Must contain at least one lowercase and one uppercase letter.
 - Must contain at least one numeric value and one special character.
 - Cannot begin or end with a numeric value.
 - The new password will be case sensitive, so make sure caps lock key is turned off.
 - Type the new password again, exactly the same, in the “**Verify Password**” block
 - Click “**Submit**”



- The “Test Listing (Unprocessed)” option allows the ESO to view a list of member’s test that have been submitted but not processed by the CGI. Each ESO can only view tests that were submitted by them.
- Click on “**Test Listing (Unprocessed)**”

UNPROCESSED TESTS (Received)										
Transaction #	SSN	OPFAC	Course	Edition	Test Form	ESO	Member EMPLID	Score	Passing Score	Date
No Test Found.										
BACK										

- The option is used for ESO’s to reassure the CGI has received all test submitted.
- Test are processed Monday – Friday at the CGI, with the exception of holidays.

Training & Academia Customer Care Tracking System (CST) Q Search

[Add Issue](#) | [List Issues](#) | [Search Issues](#) | [Logout](#)

Course Support and Testing Main Page


- ▶ Add Issue
- ▶ Library Inventory
- ▶ List Issues
- ▶ Administer EOCT
- ▶ AFCT Inventory
- ▶ **TACCTS Home**
- ▶ Go To WorkBench
- ▶ Change Password
- ▶ Order Course Material
- ▶ Logout
- ▶ Question Credit Listing
- ▶ Submit EOCT Challenge
- ▶ Test Listing (Unprocessed)

You currently have 0 ticket(s) in your queue.

[Institutes Home Page : Click Here](#)

- The ESO can switch between departments at any time.
- Click on “**TACCTS Home**”

Continue on next page.

Training & Academia Customer Care Tracking System 

Welcome JAMIE HUBBLE
You have 40 days left until your inventory expires.

Choose Department

▶ Course Support and Testing	▶ Tuition Assistance and Grants
▶ Voluntary Education	▶ System Change Listing
▶ Submit a Suggestion	
▶ User Query Maintenance	▶ Member Advising Notes

NEW* View All Open Tickets *NEW

Your password will expire in **45** day(s)

[Institutes Home Page : Click Here](#)

- It will navigate to the “**TACCTS Home Page**” to choose another department.

Reopen A TACCTS ticket

Section 2 TACCTS Procedures

Training & Academia Customer Care Tracking System (CST) Q Search

[Add Issue](#) | [List Issues](#) | [Search Issues](#) | [Logout](#)

Course Support and Testing Main Page

- ▶ Add Issue
- ▶ Library Inventory
- ▶ List Issues
- ▶ Administer EOCT
- ▶ AFCT Inventory
- ▶ TACCTS Home
- ▶ Go To WorkBench
- ▶ Change Password
- ▶ Order Course Material
- ▶ Logout
- ▶ Question Credit Listing
- ▶ Submit EOCT Challenge
- ▶ Test Listing (Unprocessed)

You currently have 0 ticket(s) in your queue.

[Institutes Home Page : Click Here](#)

Note: For all future issues regarding a specific issue (ticket) please reopen the original ticket vice opening subsequent tickets.





- Click on “**Search Issues**”

Continued on next page.

Reopen A TACCTS ticket (Continued)

Section 2 TACCTS Procedures

Search for Issues:

Submitted By:	=	JAMIE HUBBLE
Case ID:	=	
Assigned To:	=	
Member Name:	=	
Member Identifier:	=	
Comments:	Contains	
Priority:	=	
Status:	=	
Problem Type:	=	
Resolution Code:	=	
Ticket Creation Date Range:		
Starting Date:		<input type="text"/> 
Ending Date:		<input type="text"/> 
Ticket Resolved Date Range:		
Starting Date:		<input type="text"/> 
Ending Date:		<input type="text"/> 
<input type="button" value="Search"/>		

- Type in as much information known about the ticket as possible. If there is more than one ticket with similar information, all of those tickets will show up in the search results. The more information known about the particular ticket in question, the better.
- Select “**Closed**” in the Status field.
- Click on “**Search**”.

Continued on next page.

Reopen A TACCTS ticket (Continued)

Section 2 TACCTS Procedures

List Results							
Case ID:	Name:	Description:	Priority:	Submitted By:	Assigned to:	Date:	Status:
16117	Master Chief Mathieu		Normal	DAWN ALSTON	Non-Resident Training	6/4/2008 10:59:45 AM	Closed
Search Again							
Export To Excel							

Institutes Home Page : [Click Here](#)

- Locate the desired ticket to be reopened.
- Click anywhere in the row of the ticket to view the details of the ticket.

To request a status update, click on the Assigned to Section.

Case ID: 2808
Issue Name: TEST for SOP do not delete
Member Identifier:
Member Name:
Description: COURSES FOR PEOPLE OUTSIDE THE CG
Submitted by:
Assigned to: Course Support and Testing
Tech Assigned: CGI99
Request Date: 11/2/2007 8:42:41 AM
Status: Closed
Priority: Normal
Date Resolved: 11/2/2007 8:44:33 AM
Resolution: "A" SCHOOL ENTRY COMPLETE

Print Issue **Request Reopen**

Comments:	Date:	Comment By:
fghgfhgfhgfh	11/2/2007 8:44:33 AM	CGI99
fghgfhgfhgfh	11/2/2007 8:44:28 AM	CGI99
please do not delete this	11/2/2007 8:44:28 AM	JAMIE

- Click on “**Request Reopen**”

Continued on next page.

Reopen A TACCTS ticket (Continued)

Section 2 TACCTS Procedures

Request Reopen Of Ticket		
Case ID:	10410	
Issue Name:	Please do not delete	
Member Identifier:		
Member Name:		
Description:	21 DAY WAIVER REQUEST	
Submitted By:		
Assigned To:	Course Support and Testing	
Technician Assigned:	CGI51	
Submit Date :	4/4/2007 8:15:17 AM	
Status:	Closed	
Priority:	Normal	
Attachments:	Attachment 1: <input type="text"/> <input type="button" value="Browse..."/> Add a file	
Previous Attachments:	no attachments	
Comments:	<div style="border: 1px solid gray; height: 100px;"></div>	
<input type="button" value="Send Request"/>		

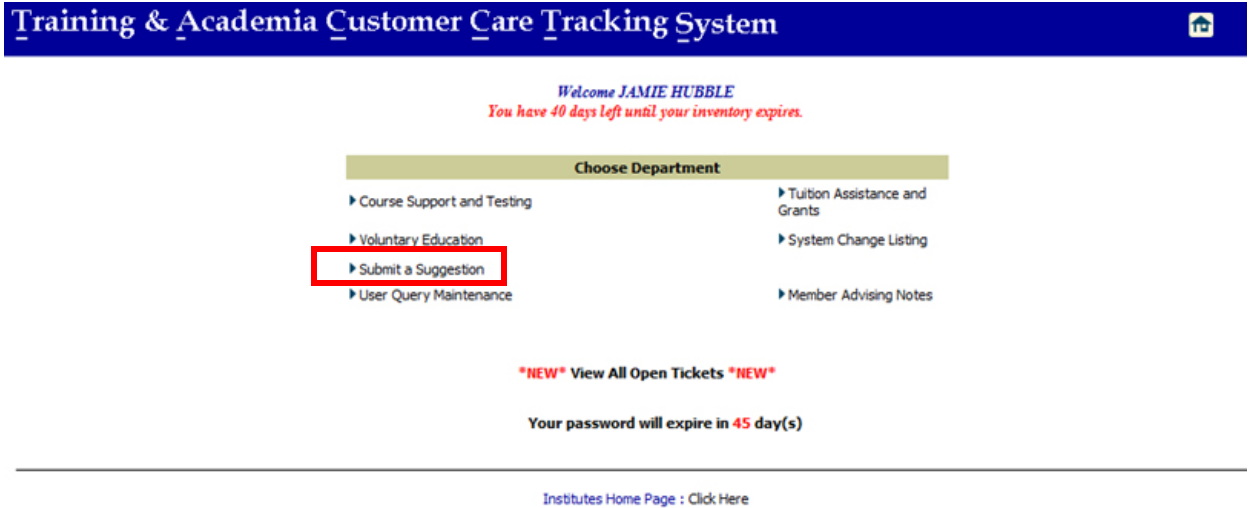
Comments:	Date:	Comment By:
The need for ticket has been completed	3/21/2008 9:49:41 AM	CGI51
this is a test for SOP	3/18/2008 2:32:35 PM	+
Ticket Creation	3/18/2008 2:32:34 PM	System

- Type in the “**Comments**” field the desired information pertaining to why the ticket is being reopened.

Note 1: The comments history is listed at the bottom of the screen.

Note: If necessary the ESO can modify the “Issue Name”, “Member Identifier”, “Member Name” and “Priority Level” fields.

- Click on “**Send Request**”
- A CGI Technician will receive the ticket and reply to the ESO comments.

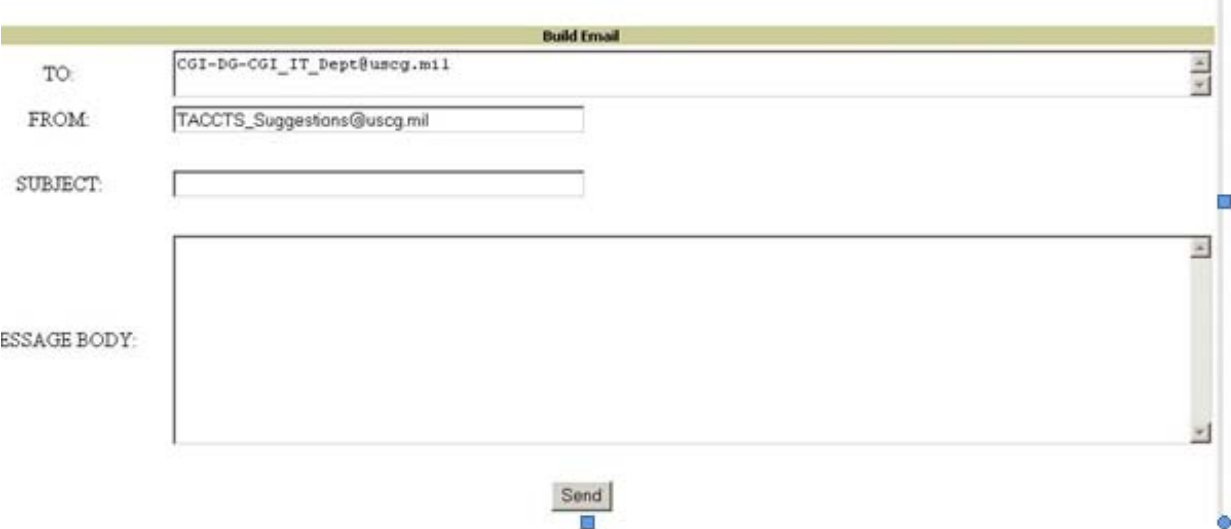


- This option allows ESO’s to submit suggestions pertaining to TACCTS.
- Go to TACCTS Home page.
- Click on “**Submit a Suggestion**”.

Continued on next page.

Submit a Suggestion (Continued)

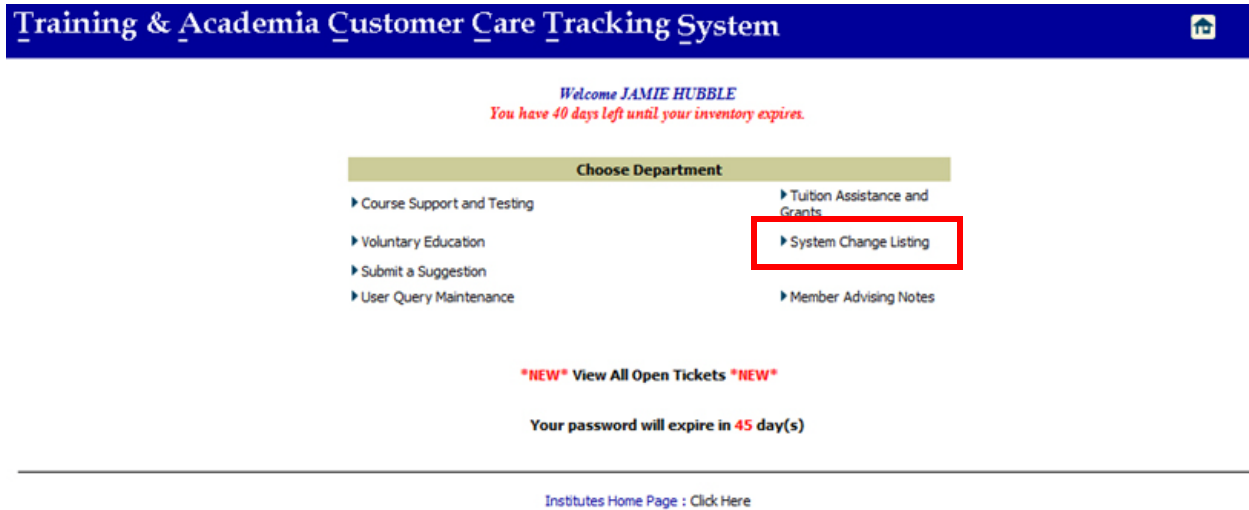
Section 2 TACCTS Procedures



The screenshot shows a web-based email composition interface titled "Build Email". It contains the following fields and controls:

- TO:** A text box containing the email address "CGI-DG-CGI_IT_Dept@uscg.mil".
- FROM:** A text box containing the email address "TACCTS_Suggestions@uscg.mil".
- SUBJECT:** An empty text box for entering the subject of the email.
- MESSAGE BODY:** A large, empty text area for entering the main content of the email.
- Send:** A button located below the message body area to submit the email.

- This will open an automatic email to the CGI IT Div.
- Type the suggestion subject in the “**SUBJECT**” text block.
- Type the suggestion in the “**MESSAGE BODY**” text block.
- Click on “**Send**”.
- The suggestion will be sent to the CGI IT Div. for review.



- This option allows ESO's to view a list of all TACCTS system changes that affect ESO's.
- Go to TACCTS Home page.
- Click on "**System Change Listing**".

Continued on next page.

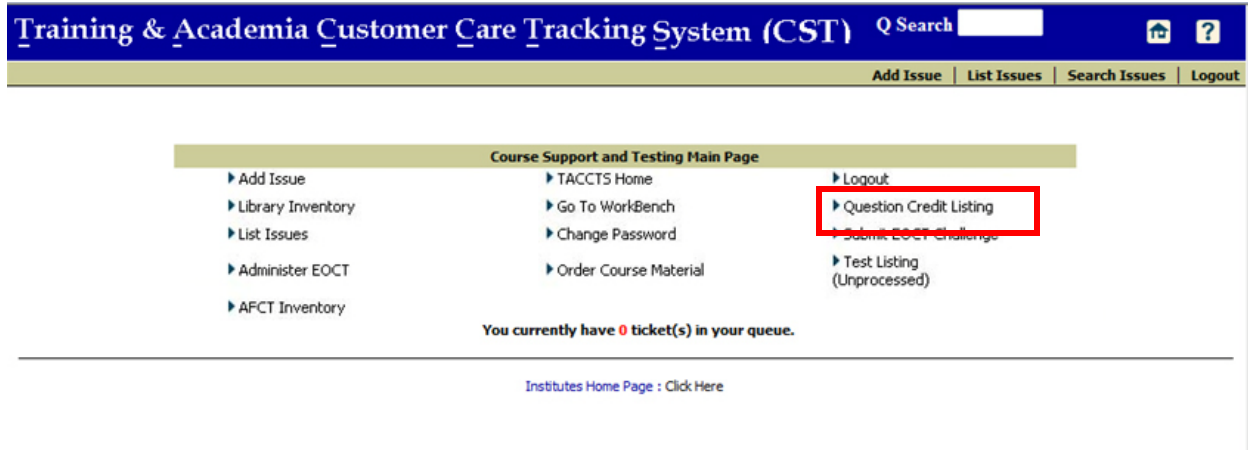
System Change Listing (Continued)

Section 2 TACCTS Procedures

TACCTS System Changes

Department Affected:	Change Description:	Change Date:	SCP Reference #:
ALL	Establish ! Ticket to ESOS Notify Website Changes	6/10/2008	10007
ALL	Message Size Limit for TACCTS messages. Messages cannot contain more than 1500 characters.	6/23/2008 1:33:35 PM	17230
TA	Grade Submission - Added popup message when ESO selects "Missing Grades" Problem Type.	6/25/2008 7:48:09 AM	15138
NRT	EPQ acknowledgement message will now be displayed and required to be accepted for all rated EOCTs.	6/26/2008 9:44:38 AM	17461
ALL	Built comment history that will be displayed on the modify, resolve, request reopen, and add comment screens. This change affects all departments.	6/26/2008 10:03:25 AM	17489
ALL	Enhanced searching capability. Applies to all departments for both techs and ESO's.	6/27/2008 3:52:15 PM	17530
NRT	Remove 7 day rule for online testing. Once a course is obsoleted, it can no longer be administered online.	7/7/2008 3:08:48 PM	18020
RSS and IT	Completion Letter ACE Statement	7/15/2008 8:55:01 AM	10472
ALL	Problem types now can be routed to different email groups for more effective management.	7/16/2008 11:17:11 AM	17552
TA	EXTENSION REQUESTS problem type added. Popup message will provide instructions when this problem type is selected.	7/16/2008 3:50:57 PM	10362
NRT	TACCTS user list sorting. Separated city and state for program managers.	7/17/2008 7:38:31 AM	18157
ALL	Inventory Lockout. ESO's who have matching DA dept or matching OPFAC tied to a library inventory will now have their account locked if the inventory verification goes past 40 days.	7/17/2008 8:41:38 AM	18158
TA	ABILITY TO SEND TA AUTH THROUGH TACCTS. CGI now has the ability to send authorizations to both ESO's and members from within TACCTS.	7/21/2008 8:17:52 AM	14865

- **Department Affected** – notify's the ESO what department at the CGI the system change will affect.
- **Change Descriptions** – a description of the system change.
- **Change Date** – the date the system change went into affect.
- **SCP Reference #** - the ticket number for the System Change Proposal.



- The “Question Credit Listing” option allows the ESO to view test questions that have been credited or changed.
- **THE PAGE MUST BE VERIFIED BEFORE SUBMITTING A CHALLENGE.** The question being challenged might already be credited.
 - Click on “**Question Credit Listing**”

Continued on next page.

Question Credit Listing (Continued)

Section 2 TACCTS Procedures

Credit Course:	Course Name:	Credit Edition:	Credit Test:	Credit Questions:	Dated Modified:	Modified By:
0110	AST1	1	53	1	7/30/2008 8:21:07 AM	
0122	ET1	2	53	9	7/30/2008 8:42:11 AM	
0130	HS1	3	51	10	7/30/2008 8:51:53 AM	
0130	HS1	3	51	15	7/30/2008 8:52:07 AM	
0130	HS1	3	52	9	7/30/2008 8:52:19 AM	
0130	HS1	3	52	13	7/30/2008 8:52:35 AM	
0130	HS1	3	53	8	7/30/2008 8:52:48 AM	
0130	HS1	3	53	14	7/30/2008 8:53:01 AM	
0132	MK1	4	52	53	7/30/2008 8:59:38 AM	
0134	MST1	6	51	33	7/30/2008 9:01:03 AM	
0176	YN1	1	52	23	7/30/2008 9:06:22 AM	
0206	AMT2	2	51	2	7/30/2008 8:23:16 AM	
0206	AMT2	2	51	39	7/30/2008 8:23:54 AM	
0206	AMT2	2	52	49	7/30/2008 8:36:47 AM	
0206	AMT2	2	53	42	7/30/2008 8:37:09 AM	
0210	AST2	2	51	7	7/30/2008 8:37:54 AM	
0216	DC2	1	51	59	7/30/2008 8:39:21 AM	
0219	EM2	3	51	26	7/30/2008 8:40:58 AM	
0219	EM2	3	52	27	7/30/2008 8:41:23 AM	
0222	ET2	2	51	5	7/30/2008 8:43:12 AM	
0222	ET2	2	53	5	7/30/2008 9:23:04 AM	
0229	GM2	9	51	13	7/30/2008 8:51:11 AM	
0229	GM2	9	53	10	7/30/2008 8:51:28 AM	

- Displays all credited and changed questions.
- This page is managed and modified by the CGI.

Submit EOCT Challenge


Section 2 TACCTS Procedures

- The “**Submit EOCT Challenge**” option allows the ESO to submit an EOCT question challenge to the SMS.
- Click on “**Submit EOCT Challenge**” (see red squares)

Continued on next page.

Submit EOCT Challenge (Continued)

Section 2 TACCTS Procedures

Create EOCT Question Challenge	
Course:	<input type="text"/>
Edtion:	<input type="text"/>
Test Number:	<input type="text"/>
Question Number:	<input type="text"/>
Question Answer:	<input type="text"/>
Test Date:	<input type="text"/> 
Member EMPLID:	<input type="text"/>
Challenge Reason:	<input type="text"/>
Submitted By:	<input type="text"/>
Assigned To:	SMS-Challenge <input type="text"/>
Request Date:	8/11/2008
Status:	Open <input type="text"/>
Priority:	Normal <input type="text"/>
<input type="button" value="Submit"/>	


- To submit a challenge fill in each field:
 - **Course-** Click on the drop down menu to select the course –edition – test number.
 - **Edtion-** Click on the drop down menu to select the edition. (for verification)
 - **Test Number-** Click on the drop down menu to select the test number. (for verification)
 - **Question Number** – Type in the question number that is being challenged.
 - **Question Answer** – if the challenge is concerning on of the answers, type in the question answer that is being challenged. (ie..A, B, C, D, E)
 - **Test Date-** Click on the calendar icon, and then click on the date the challenge is being submitted. (today’s date)

(Explanation of this screen continued on next page)

Continued on next page.

Submit an EOCT Challenge (Continued)

Section 2 TACCTS Procedures

Create EOCT Question Challenge	
Course:	<input type="text"/>
Edition:	<input type="text"/>
Test Number:	<input type="text"/>
Question Number:	<input type="text"/>
Question Answer:	<input type="text"/>
Test Date:	<input type="text"/> 
Member EMPLID:	<input type="text"/>
Challenge Reason:	<input type="text"/>
Submitted By:	<input type="text"/>
Assigned To:	<input type="text" value="SMS-Challenge"/>
Request Date:	8/11/2008
Status:	<input type="text" value="Open"/>
Priority:	<input type="text" value="Normal"/>
<input type="button" value="Submit"/>	

- To submit a challenge fill in each field (cont.):
 - **Member EMPLID:** type in the member’s Employee ID Number that is challenging the question.
 - **Challenge Reason** – Click on the drop down menu to select the reason the question is being challenged.
 - **Submitted By-** will default to the ESO’s name submitting the challenge. (Your name)
 - **Assigned To-** will default to the SMS that is responsible for the test being challenged.
 - **Request Date-** will default to today’s date.
 - **Status-** will default to “Open”.
 - **Priority-** Click on the drop down menu to select the priority of the challenge.
 - Click on “**Submit**”.
- The ticket will be sent to the SMS responsible for the test that is being challenged. The ESO will receive an email from TACCTS stating the challenged has been submitted. Once the challenge is resolved the ESO will receive an email stating the comments and the resolution of the challenged test question from the SMS. If the challenge is accepted, **sometimes** the resolution ticket will contain the new correct answer to the question. **DO NOT FORWARD THESE EMAILS OR TACCTS TICKETS TO THE MEMBER.** Prevent possible compromises.
- Challenge tickets will not show up in the ESO’s “List Issues” screen. If the members test score is affected by the challenge, the member will be notified by the CGI.

Training & Academia Customer Care Tracking System

Welcome **JAMIE HUBBLE**
You have 40 days left until your inventory expires.

Choose Department

- ▶ Course Support and Testing
- ▶ Voluntary Education
- ▶ Submit a Suggestion
- ▶ User Query Maintenance
- ▶ Tuition Assistance and Grants
- ▶ System Change Listing
- ▶ **Member Advising Notes**

NEW* View All Open Tickets *NEW

Your password will expire in **45 day(s)**

[Institutes Home Page : Click Here](#)

- The “**Member Advising Notes**” option allows all ESO’s to add and track advising notes on all members at any given time.
- The option is available only on the Home page after signing into TACCTS.
- Click on “**Member Advising Notes**”.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures

Search Member Advising Notes
Member Identifier

[Institutes Home Page : Click Here](#)

- Enter the members “**EMPLID**”.
 - Click on “**Search**”.
-

Advisory Notes Listing				
Member ID :	Subject:	Member Notes:	Date Added	Advisor:
	degree plan	Advised	6/16/2009	
	Joe Coastie	Advised Student to obtain a degree plan from the CGI Vol Ed Dept.	6/16/2009	

Add New

You are now viewing records **1** through **2** out of **2** records.

<< Back || Next >> || Last Page >>

[Back To Search](#)

- All advisory notes pertaining to the member will display.
 - To review an existing note on a member, click anywhere in the row of the note to view the details of the note.
-

Member ID:

Member Name:

Advising Subject:

Advisor:

Date Added: 6/16/2009

Advising Notes: Advised Student to obtain a degree plan from the CGI Vol Ed Dept.

Print Advising Note

[BACK](#)

- To print the note, click on “**Print Advising Note**”.
-

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures

Advisory Notes Listing				
Member ID:	Subject:	Member Notes:	Date Added	Advisor:
	degree plan	Advised	6/16/2009	
	Joe Coastie	Advised Student to obtain a degree plan from the CGI Vol Ed Dept.	6/16/2009	

Add New

You are now viewing records 1 through 2 out of 2 records.

<< Back || Next >> || Last Page >>

Back To Search

- To add a new note:
 - Click on “**Add New**”.

Create Counseling Notes	
Member:	<input type="text"/>
Advisor:	<input type="text" value="JAMIE HUBBLE"/>
Subject:	<input type="text" value="Joe Coastie"/>
Advising Date:	<input type="text" value="06-16-2009"/>
Notes:	<input type="text" value="Advised Student to obtain a degree plan from the CGI Vol Ed Dept."/>
<input type="button" value="Add"/>	

- The “**Member**” field will automatically default to the members “**EMPLID**”.
- The “**Advisor**” field will automatically default to the “**ESO’s**” name.
- Type the “**Subject**” of the note in the “**Subject**” field.
- Click on the “**date**” in the “**Advising Date**” field.
- Type the **details of the advice given to the member** in the “**Notes**” field.
- Click on “**Add**”.

Continued on next page.

Member Advising Notes (Continued)

Section 2 TACCTS Procedures

Search Results				
Member ID:	Subject:	Member Notes:	Date Added	Advisor:
	degree plan	Advised	6/16/2009	JAMIE HUBBLE
	Joe Coastle	Advised Student to obtain a degree plan from the CGI Val Ed Dept.	6/16/2009	JAMIE HUBBLE

[Add New](#)

You are now viewing records 1 through 2 out of 2 records.

<< Back || Next >> || Last Page >>

[Back To Search](#)

- The note will now be listed on the “**Advisory Notes Listing**” for that member.
 - All ESO’s can access all advisory notes for all members. (unless no notes exist)
-

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APPENDIX A

ESO DESIGNATION LETTER & PROCEDURES

ESO Designation Letter & Procedures

Appendix A TACCTS Procedures

Procedure Instructions

At the time of designation as a primary or alternate ESO for your unit, a copy of the designation memo needs to be sent to the CST Div of the CG Institute. This action is necessary in order to properly manage the TACCTS accounts. If an ESO transfers PCS, or separates, the CGI will not know that a new member has assumed these responsibilities unless such notification is received.

An example of an ESO Designation letter is on the following page, which can also be used as a template if desired.



Commanding Officer (unit address)

Staff Symbol:

Phone:

FAX:

Email:

1500

10 August 2010

MEMORANDUM

From: CO/OINC Name, Unit Name , Rank, EMPLID Reply to
Attn of:

To: Prospective ESO, Name, Unit Name , Rank, EMPLID
Thru: Current ESOs Name, Unit Name, Rank, EMPLID
Subj: DESIGNATION AS EDUCATION SERVICES OFFICER (ESO)

Ref: (a) CG Institute ESO Procedures Guides Vols I, CGINST P1550.0

1. You are hereby designated as the (enter unit's name) (enter primary or alternate) Education Services Officer (ESO). You will familiarize yourself with your responsibilities as outlined in reference (a).
2. You are authorized to complete the ESO certification section of the Application for Coast Guard Tuition Assistance, CG Form 4147, the Application for Tuition Assistance Waiver, CG Form 4147-1 and the Guard Foundation Education Grant Program (CGFEGP) application, CGI Form 1560/10a. The command endorsement signature block must be completed by the CO/OIC or appropriate delegated authority.
3. As ESO, you will responsible for using the TACCTS to send inquiries and requests to the CG Institute on behalf of the command. This customer service tool is to be used for tuition assistance, non-resident training (tests) and resource support section (courses) issues.
4. It is your responsibility upon assuming control of a unit EOCT inventory, to verify that you will never be required to take any exams in your inventory. Designated ESOs and Proctors are ineligible to take CGI exams for six months if they currently hold the exam in their inventory, held the exam in an inventory within the last six months or administered the exam within the last six months. If you are ever required to take an exam that you have held in an inventory, you must request a waiver to this policy from the Commanding Officer, Coast Guard Institute. Exams most frequently affected are the Deck Watch Officer Exam and Renewal. It is your responsibility upon assuming control of a unit EOCT inventory, to verify if any such exams are being held and coordinate with your Command and the CG Institute to provide alternate secure storage and administration.

#

FIRST ENDORSEMENT

From: Prospective ESO's name
Unit name

To: CO/OinC name
Unit name

1. I hereby acknowledge the above designation.
Copy: Admin
CG Institute (CST)

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APPENDIX B

ESO RELIEF LETTER & PROCEDURES

ESO Relief Letter & Procedures

Appendix B TACCTS Procedures

Procedure Instructions

At the time of relief as a primary or alternate ESO for your unit, a copy of the relief memo needs to be sent to the CST department of the CG Institute. This action is necessary in order to properly manage the TACCTS accounts. If an ESO transfers PCS, or separates, the CGI will not know that his/her TACCTS account needs to be disabled unless we receive such notification. Sending a copy of the relief memo will also help the CG Institute prevent unwanted ESO related emails from being sent to you. An example of an ESO Relief letter is on the following page, which can also be used as a template if desired.



Commanding Officer (unit address)
Staff Symbol:
Phone:
FAX:
Email:

1500
8 September 2011

MEMORANDUM

From: Current ESOs Name, Unit Name, Rank, EMPLID
Reply to
Attn of:

To: CO/OinC Unit Name
Thru: Prospective ESOs Name, Unit Name, Rank, EMPLID

Subj: EDUCATION SERVICES OFFICER RELIEF/AUDIT

Ref: (a) Education Services Officer Procedures VOL. I, CGINST P1550.1

1. IAW reference (a) and effective the date of this memorandum, I (current ESOs Name) have been relieved by (new ESO name) of the duties and responsibilities of (primary or alternate) ESO for (name of unit).
2. An audit of all End Of Course Tests has been completed. All tests have been accounted for. All relevant documents, logs, files have been turned over and are in a secure safe.

#

Copy: Unit Files
CG Institute (CST)