STANDARD OPERATING PROCEDURES (SOP)

FOR

COAST GUARD'S TRAINING SYSTEM

EDUCATION SERVICES OFFICER (ESO)
VOLUME I

GETTING STARTED

Force Readiness Command
Coast Guard Institute
September 2012

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U.S. Department of Homeland Security United States Coast Guard	Commanding Officer U.S. Coast Guard Institute	5900 SW 64th Street, Room 232 Oklahoma City, OK. 73169-6990 Phone: (405)-954-7263 Fax: (405) 954-3684 Email: CGI-DG-CST_DIV@uscg.mil

CGINOTE 1000.1C

CANCELLED: AUG 2013

CG INSTITUTE NOTICE 1000.1C

Subj: **CH-3 TO EDUCATION SERVICE OFFICER VOLUME I, GETTING STARTED**

Purpose This promulgates the Standard Operating Procedures (SOP) for the ESO's collaboration with the Coast Guard Institute (CGI).

Action Full Time and Collateral duty ESOs should ensure compliance with the provisions of this SOP. Internet release is authorized.

Directives Affected CGI Note 1000.1B is cancelled.

Summary of Changes Section 1: Changed policy language to reflect ESO designation requirements. Change found on page 1-1.

Environmental Aspect & Impact Considerations Environmental considerations were examined in the development of this Notice and have been determined to be not applicable.

Forms Not applicable.

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Printed Copies Printed copies of the ESO Volume I, Getting Started, are not available. Distribution is through CGI website at http://www.uscg.mil/hq/cg1/cgi/default.asp.

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Comments and Recommendations The next change to the ESO Volume I manual is expected to be completed by August 2013. CGI encourages user recommended revisions and corrections to the ESO Volume I. Comments or recommendations may be submitted by emailing CGI-DG-CST_DIV@uscg.mil.

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//s//
DONALD L. WINFIELD
CDR, U.S. Coast Guard
Commanding Officer

SOP Table of Contents

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SECTION 1: GETTING STARTED AS AN ESO

Designation and Relief of Education Service Officers (ESO)

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Policy

In accordance with the Performance, Training and Education Manual COMDTINST M1500.10C, each CO/OINC will designate a collateral duty Education Services Officer (ESO) if a full time ESO is not assigned to the unit. The Coast Guard Institute requires all designations be in writing by Coast Guard Memorandum. The ESO is the unit's primary administrator of the end-of-course tests (EOCTs) and rating advancement tests (RATs), and must be a Chief Petty Officer or above, or equivalent civilian grade of GS7 or above.

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ESO Designation and Relief Memos

At the time of designation as a primary or alternate ESO, a copy of the designation memo shall be sent to the Course Support and Testing Division (CST) of the Coast Guard Institute (CGI), along with the relief memo, for the ESO that is being relieved. Both memos must be signed by the Commanding Officer (CO) or Officer in Charge (OINC). **Please send all designation and relief memos together via Training and Academia Customer Care Tracking Tool (TACCTS), through the relieving ESO's TACCTS account.**
[Example: The relieved ESO is the new alternate ESO; in this case you would need to send a designation memo for the new ESO, a relief memo for the relieved ESO, and a designation memo for the alternate ESO]. This action is necessary in order to properly manage the TACCTS accounts. If an ESO does not submit an ESO designation memo, they will not receive a TACCTS account or be recognized as an ESO by the CGI. If the relieving ESO is not available, send an ESO Designation memo to the CST Division via other methods listed below, and state the name of the ESO that was relieved. The CGI will then remove the previous ESO from TACCTS.
Methods to send designation and relief memo:
- TACCTS (using the relieving ESO's account) (preferred method)
- CST email address – CGI-DG-CST_DIV@uscg.mil
- CST fax number - 405-954-3684
- Regular mail - Commanding Officer (CST)
    U.S. Coast Guard Institute
    5900 SW 64th St., room 232
    Oklahoma City, OK. 73169-6999

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ESO Designation and Relief Memos (Cont.)

Examples of an ESO Designation and Relief memo are shown in Figure 1-1 and 1-2. For your convenience, both templates can be found on the CG Institute's website.

Once the designation memo is received by the CST Division, the ESO will be added to the ESO email distribution list and a TACCTS account will be created. The ESO will receive an email from personnel in the CST Division containing their "user name" and "temporary password" for TACCTS. A link to the TACCTS webpage is located on the CGI website. The relieved ESO's TACCTS account will be deactivated unless they are becoming the alternate. In this case, their status will be changed to alternate ESO in TACCTS and will use the same username and password that they have been using.

TACCTS for new ESOs

TACCTS is the web-based tool used for the ESOs to interact with the CGI in solving issues.

TACCTS Log in procedures:
- Once the email containing your "**username**" and "**temporary password**" is received.
- Click on the TACCTS link located on CGI website.
- The TACCTS login page will display.
- Type in your TACCTS "**username**".
- Type in the TACCTS "**temporary password**".
- Click on "**Login".**
- You will be prompted to change your password.
- Type in your new "**password**".
    - Min 8 characters, max 15 characters.
    - 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 or a special character.
    - Repeating characters are only counted as one character.
        - Example: Temppass = Tempas.
    - Passwords must be changed every 90 days.
    - Accounts are deleted after 6 months of inactivity.
- Type it again, in the "**verify password**" block.
- Click on "**submit**".
- The TACCTS home page will open.

**TACCTS for
new ESOs
(Cont.)**

- Click on the "**Course Support and Testing**" option. You will then be on the CST main page.
- Click on the help link in the upper right corner of the screen to view the SOP for CST TACCTS.
- Double click on the "**ESO SOP Guide**", for procedures on how to use the TACCTS system.

**U.S. Department of
Homeland Security**

**United States
Coast Guard**

1500
01 Oct 2012

MEMORANDUM

From: CO/OINC Name   Reply to
        Unit Name   Attn of:

To: Prospective ESO Name, Rank, EMPLID
        Unit Name
Thru: Current ESO's Name, Rank
        Unit Name

Subj: DESIGNATION AS EDUCATION SERVICES OFFICER (ESO)

Ref: (a) CG Institute ESO Procedures Guide Vol I, Getting Started
        (b) CG Institute ESO Procedures Guide Vol II, Training
        (c) CG Institute ESO Procedures Guide Vol III, Voluntary Education
        (d) CG Institute ESO Procedures Guide Vol IV, More on Voluntary Education
        (e) Performance, Training and Education Manual, COMDTINST M1500.10C

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), (b), (c), (d), (e), the online ESO Certification Course and online College 101
course. *(Note: The ESO designation does not automatically extend to administration of SWE,
due to different rank/grade requirements. If you meet the requirements to administer the
SWE that designation can be included as an additional paragraph. Ref: COMDTINST
M1000.2 Chapter 3.B.6.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.

3. As an ESO, you will be responsible for using Training and Academia Customer Care
Tracking Tool (TACCTS) to send inquiries and requests to the CG Institute on behalf of the
command. This customer service tool is to be used for communication with the Tuition
Assistance & Grants, Course Support & Testing and Registrar's Office Divisions of the Coast
Guard Institute (CGI).

4. It is your responsibility upon assuming control of a unit's end-of-course test 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 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/RAT 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.

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<div align="right">01 Oct 2012</div>

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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Figure 1-1. Example of ESO Designation Memo

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U.S. Department of Homeland Security

United States Coast Guard

Commanding Officer

(Unit Address)
Staff Symbol:
Phone:
Fax:
Email:

1500
01 Oct 2012

MEMORANDUM

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

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

Subj: EDUCATION SERVICES OFFICER RELIEF/AUDIT

Ref: (a) CG Institute ESO Procedures Guide Vol I, Getting Started
        (b) CG Institute ESO Procedures Guide Vol II, Training

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 and files have been turned over and are in a secure safe.

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Copy: Unit Files
       CG Institute (CST)

Figure 1-2. Example of ESO Relief Memo

SECTION 2: E-TESTING QUESTION MARK PERCEPTION ACCESS

Question Mark Perception Access

Overview   Questionmark Perception (QMP) is the web-based application the Coast Guard has selected for all eTesting. ESO's and their members will access electronic Rating Advancement Tests (RATs) via the CGPortal and the Learning Management System (LMS).

ESO's will be able to do two things with their QMP account:

  1) Enable members to enter the exam by entering their QMP username and password at the proper time.

  2) Log in to the Enterprise server at http://etesting.uscg.mil/em5/Main.aspx to change their password.

Requesting Access   To request access to Questionmark Perception, ESO's must have access to TACCTS. If an ESO does not have access to TACCTS, they must provide an ESO Letter of Designation (ref. 1.1) to the CST Division.

Once TACCTS access is given, submit a request through TACCTS requesting "E-Testing Access Account".

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SECTION 3: ESO EXAM ELIGIBILITY AND WAIVER

Eligibility and Waiver Request

Overview   Designated ESOs 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 (i.e. DWINTO/DWINTR). This may be waived by the Commanding Officer, Coast Guard Institute.

Waiver requests for specific test may be emailed to the CGI (CST), (*CGI-DG-CST_DIV@uscg.mil*) stating the reason for the request and the last date the test was administered. The respective ESO's command should be copied on all requests. Email approval, if appropriate, will be provided and should be used as the authority for the ESO that will administer the exam.

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SECTION 4: BECOMING A LIBRARY UNIT

Introduction

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Non-Library Unit Definition	A Non-library Unit is a unit authorized by the CGI to order and hold EOCTs/RATs for specific members that are enrolled in CGI courses. These EOCTs/RATs are specifically assigned to a member at the unit.

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Library Unit Definition	A Library Unit is a unit authorized by the CGI to maintain a library of EOCTs/RATs for use by their personnel. These EOCTs/RATs are not specifically assigned to any member at the unit.

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Request to be a Library Unit

A unit requesting to become a Library Unit must submit a TACCTS issue or an e-mail request to *CGI-DG-CST_DIV@uscg.mil*.

All tests that were assigned to individuals, prior to its library status, should be destroyed locally, recorded in the unit Destruction Log and reported to the CGI CST Div via TACCTS using the "Add Issue" option. Include a detailed list of test destroyed with member name and EMPLID.

The CGI will send the ESO a packet containing:
- A memorandum of understanding (MOU) between the CGI and the unit. The ESO must sign the MOU and return it to the CGI (keeping a copy for the unit). The unit must retain this MOU on file until the Library Unit status is disestablished.
- A survey to be filled out by the ESO. It will list the EOCTs/RATs the unit is requesting to keep in the library.

The ESO will return the signed MOU and survey to the CGI CST Div by:
- TACCTS
- CST email address – CGI-DG-CST_DIV@uscg.mil
- CST fax number - 405-954-3684

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Action taken by CGI once MOU and Survey is received

The CGI will take the following action upon receipt of the MOU and survey.
- Requested EOCT/RAT will be added to Library Unit inventory in TACCTS.
- Requested EOCT/RAT will be mailed to the unit within 3 business days.
- When the new tests are mailed to the ESO, the CST Division will change the status on the same TACCTS issue to "Pending Notification of Receipt".

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Action Upon Receipt of EOCT/RAT

Take the following action upon receipt of initial EOCT/RAT library from CGI:

- Ensure all requested materials were received.
- Acknowledge the inventory is correct by logging into TACCTS and verifying the EOCT/RAT received to the EOCT/RAT inventory listed in TACCTS.
- The ESO will go to the "Pending" TACCTS issue and respond in the comments field.
    - o If all requested material was not received, or the EOCT/RAT inventory listed in TACCTS is not accurate, detail the discrepancies.
    - o If all requested material was received and reflected accurately in TACCTS, acknowledge "Test Received".
- Do not open a new TACCTS issue by responding to the same issue. A complete history of the transaction is maintained. *[For Procedures on how to submit TACCTS issue, see SOP for TACCTS under the help link on the CST TACCTS home page]*

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Unit Course Library

Courses being requested to stock inventory should be limited to those that are applicable to the unit and used as a loan check out to members assigned. To review all current courses and EOCTs/RATs offered by the CGI, see EOCT/RATs Course Information Page posted on the CGI's website at *http://www.uscg.mil/hq/cgi/downloads/EOCT.pdf*

Classified course material will not normally be included or authorized for a Library Unit. Request for a classified library may be warranted under extenuating circumstances. The request can only be approved by the CGI. *[See Section 2, Order Classified Material]*

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