Employee Task Aids

To foster a high-performing, qualified civilian acquisition workforce.

https://www.fai.gov/

FAI@mail.mil

Table of Contents

User Account Management	Page #
Log On – Username and Password	p.5
Forgot Password	p.7
Request an Account Using the SAAR Form	p.11
View User Record	p.16
User Record Fields	p.17
Edit User Record via Advanced Form	p.20
Update Manager	p.22
View User Transcript	p.24
View Transcript Status	p.25
View CLPs on Completed Transcript	p.26
Continuous Learning	
Submit External Continuous Learning Activity Request	p.29
Edit External Continuous Learning Activity Request Prior to Approval	p.32
Withdraw Future Dated External Continuous Learning Activity	p.34
Resubmit Denied External Continuous Learning Activity	p.36
Access & Review Your Continuous Learning Individual Progress (CLIP) Dashboard	p.38
Online Training	
Use Global Search	p.42
Register for Online Training (OLT)	p.44
View Completion Certificate	p.46
Instructor Led Training	
Register for Instructor-Led Training (ILT)	p.48
Indicate Interest in a Future Session	p.50
Withdraw from an ILT	p.52

Table of Contents (Cont. 1)

Equivalency/Fulfillment Forms	
Submit an Equivalency/Fulfillment Form	p.54
View Submitted Forms	p.57
View Form Status	p.58
Certifications	
Request and Manage a Certification	p.61
Request Education/Experience Verification	p.63
Warrants	
Submit a Warrant Application From	p.67
Individual Development Plans	
Create an IDP	p.70
Update an IDP	p.77
Cancel an IDP	p.79
Reports	
View and Download Custom Reports	p.81
Help	
Help	p.85
When to Use Equivalent/Fulfillment vs. External CL Activity Requests	p.86
Agency Addendums	
DHS	p.88
DOI	p.89
EPA	p.90
Treasury	p.93

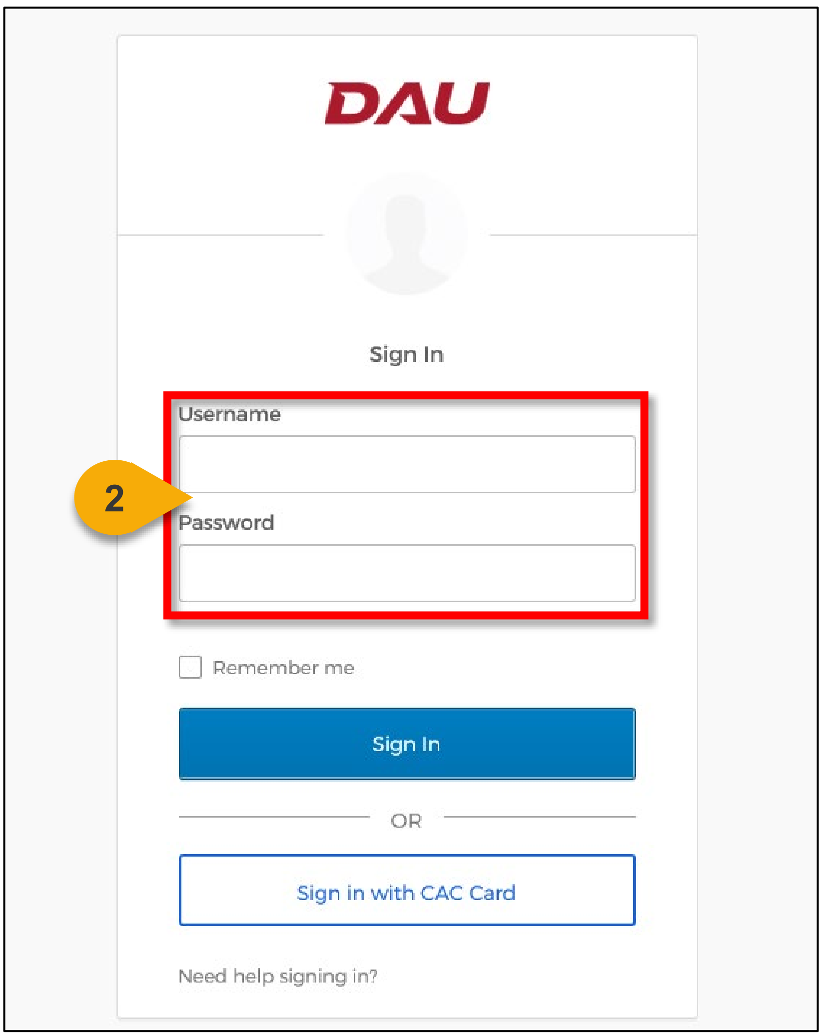
User Account Management

Log On – Username and Password

When you want to log in with your Username and password…

Step 1: Go to https://dau.csod.com/ (do not use the Internet Explorer browser). You may want to log out of VPN before starting this process.

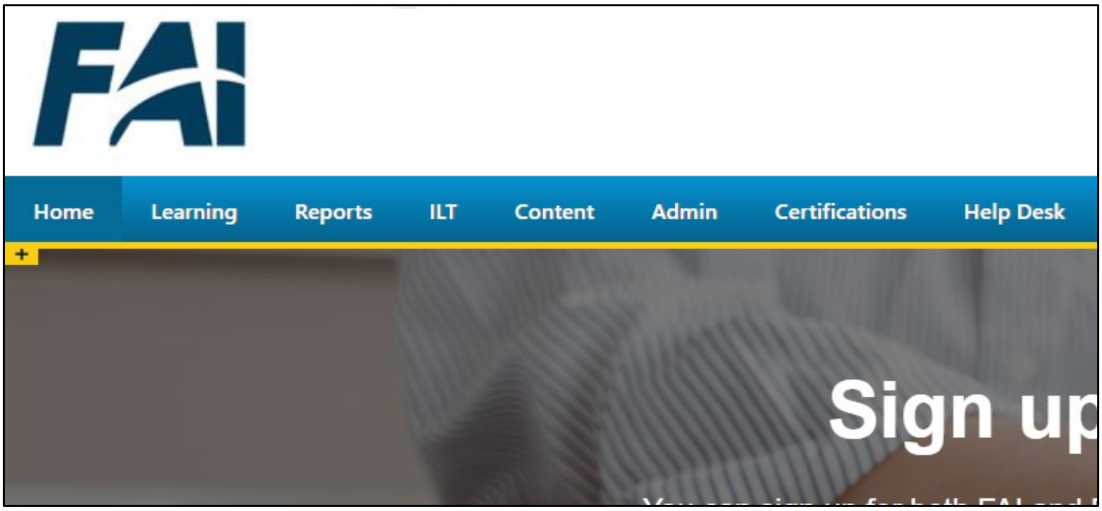
Step 2: The login window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.



Log On – Username and Password (Cont. 1)

Step 3: Click **Sign In.**

Once you successfully complete the SSO login process, CSOD should open with your organization's logo in the upper left corner.

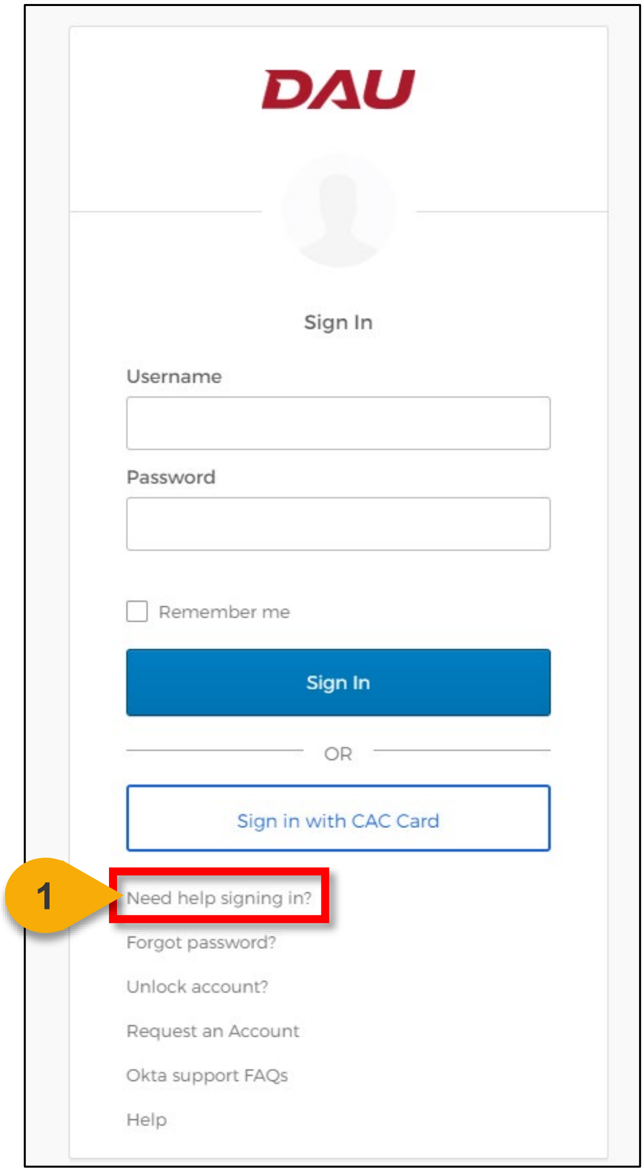


NOTE: If you receive an error message:
- Clear your cache
- Try a different browser
- Disconnect from the VPN

Forgot Password

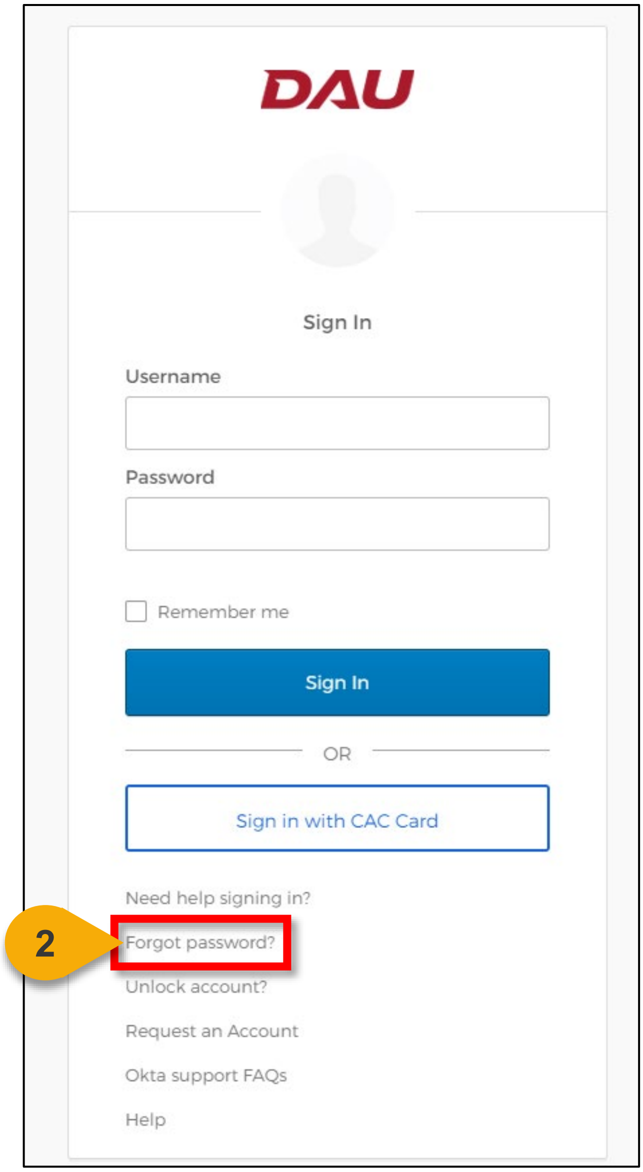
When you can't log on…

Step 1: If you need help signing in, select the **Need help signing in?** link at the bottom of the window.



Forgot Password (Cont. 1)

Step 2: If you already set up OKTA to reset your password, select the **Forgot Password?** option to have a new password/PIN sent to your email or phone.

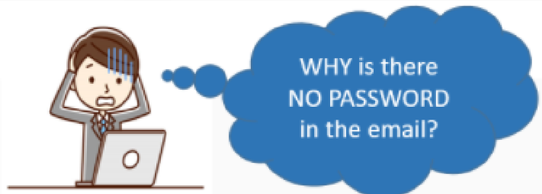


Forgot Password (Cont. 2)

Step 3: Select the OKTA support FAQs option and follow the directions for **Q2.**

Q2: HELP! I requested a password be sent to me via email, but there is not a password in the email I was sent. Where is my password?

3



DAU - Okta Password Reset Requested

Hi Teresa,

A password reset request was made for your Okta account. If you did not make this request, please contact the DAU Help Desk dauhelp@dau.edu immediately.

If you require further assistance, please view the Okta support FAQs or contact the DAU Help Desk using the options below:

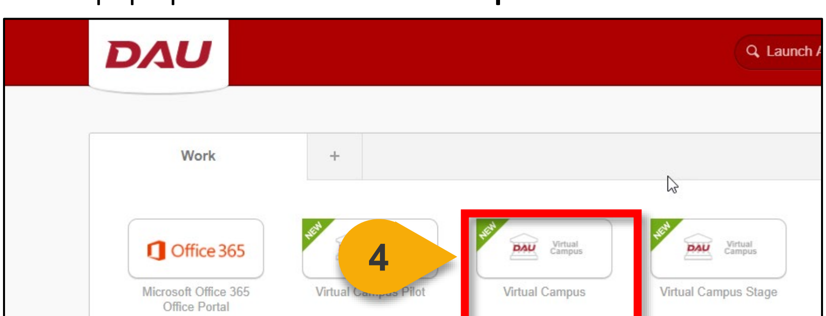
Okta support FAQs

Phone: 703-805-3459 | 866-568-6924 | DSN: 655-3459; All Option 1

Email: dauhelp@dau.edu

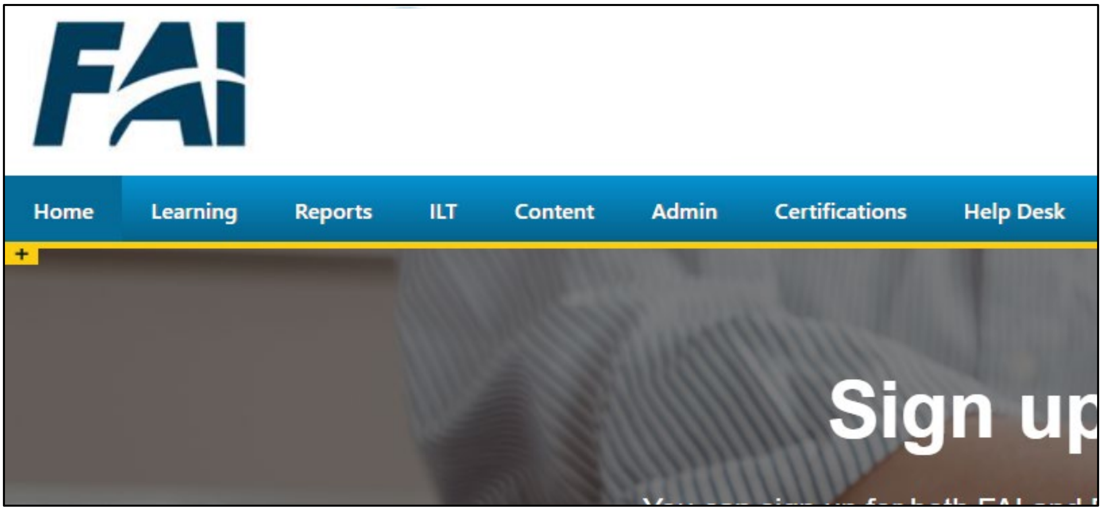
A: If you have not completed the account setup process, you will not be able to use the self-service feature to reset your own password. You need to request the DAU Help Desk (**DAUHelp@dau.edu**) provide you with your login informatin so you can officially setup your account. Include the last 4 of your SSN/EIN/FIN when submitting this request so your account can be validated.

Step 4: Once you have the Username and password entered, the list of systems you have access to will pop up. Select the **Virtual Campus** button.



Forgot Password (Cont. 3)

Once you successfully complete the SSO log in process, CSOD should open with your organization's logo in the upper left corner.



NOTE: If you receive an error message:

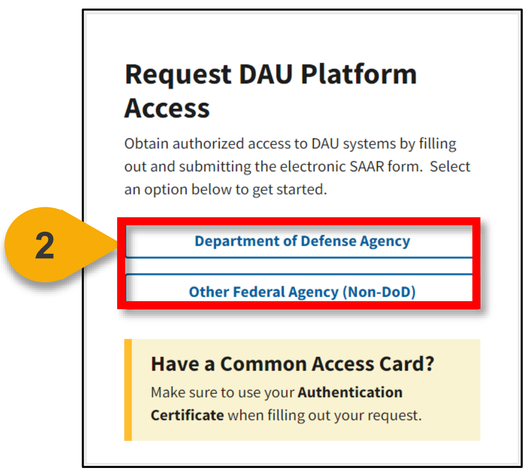
- Clear your cache
- Try a different browser
- Disconnect from the VPN

Request an Account Using the SAAR Form

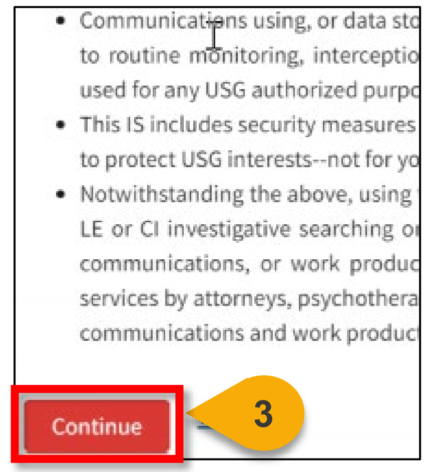
When you need to complete the DAU SAAR for access to the Virtual Campus…

Step 1: Navigate to https://saar.dau.edu.
Recommended browser: Google Chrome or Microsoft Edge.

Step 2: Select whether you are associated with the **Department of Defense Agency** or **Other Federal Agency (Non-DoD).**



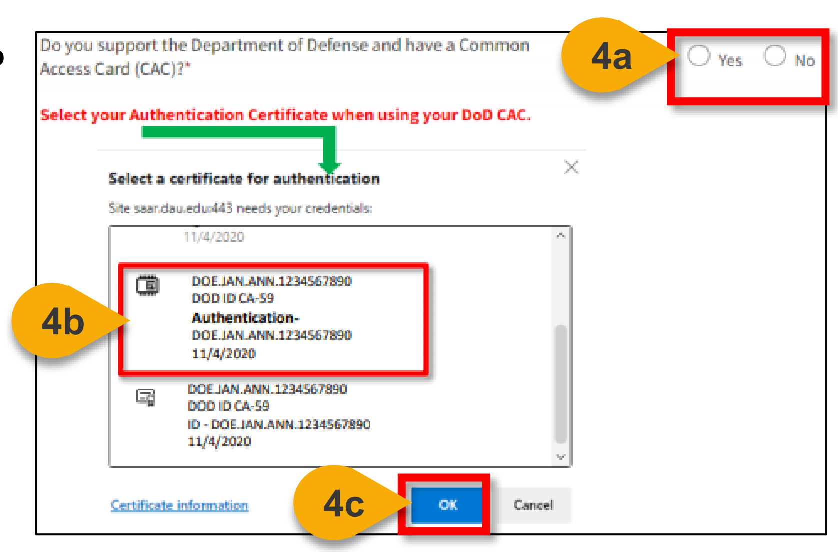
Step 3: A **Warning Notice** will appear. After reading, select **Continue** at the bottom of the page.



Step 4a (DoD only): If you selected DoD, you will need to select **Yes or No** to answer the **CAC** question.

Step 4b (DoD only): Then, select the correct **certificate** for authentication.

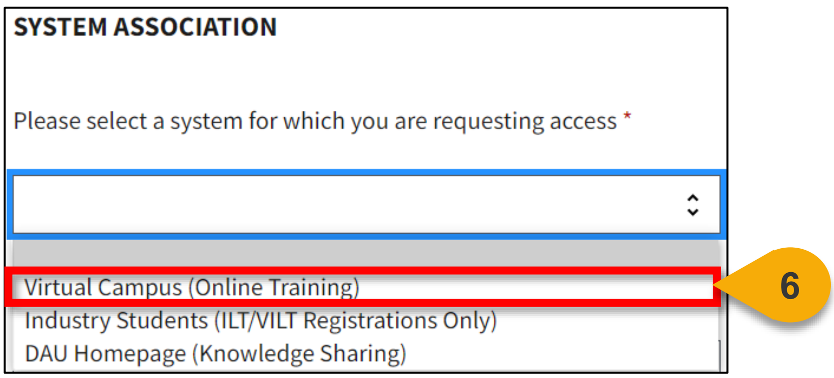
Step 4c (DoD only): Click **OK.**



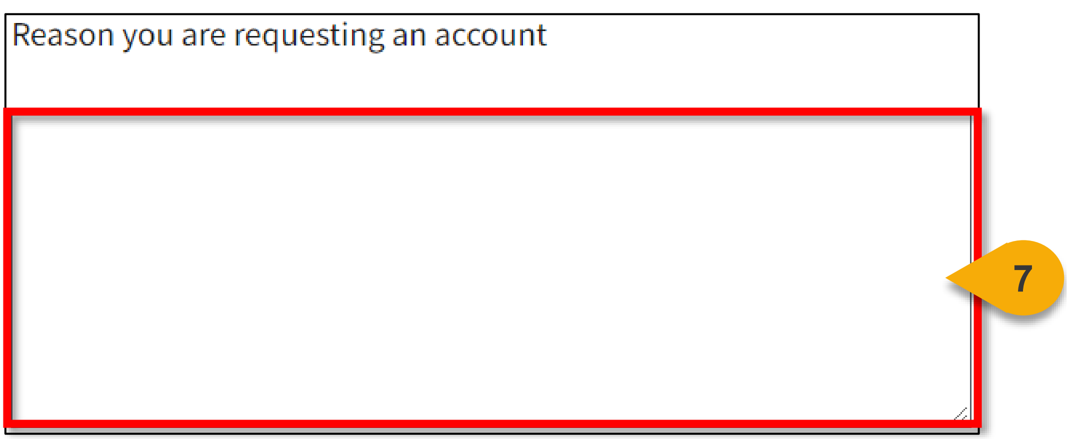
Request an Account Using the SAAR Form (Cont. 1)

Step 5: Select **YES** or **NO** to acknowledge whether you know your DAUID**.**

Step 6: Click the dropdown under System Association to select **Virtual Campus (Online Training)** to obtain access to the Virtual Campus.



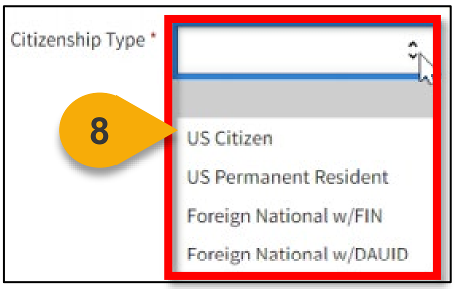
Step 7: Enter the reason for your request in the **Reason you are requesting an account** field.



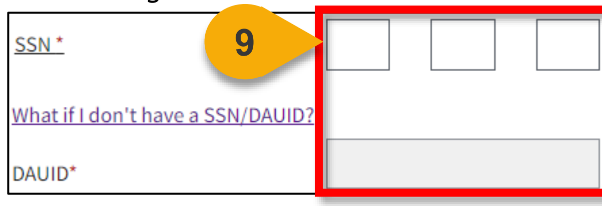
Request an Account Using the SAAR Form (Cont. 2)

Foreign National Students: Please review the guidance on the FAQ website (https://www.dau.edu/faq/p/FLN-Account-Creation) to determine if you need an EIN to submit the SAAR.

Step 8: Select your citizen type from the **Citizenship Type** field.

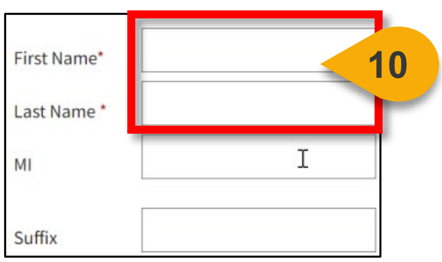


Step 9: Enter your **SSN** or **DAUID** in the appropriate field. *If you do not have either number, please go to the* *[FAQ website](https://www.dau.edu/faq)* *for additional guidance.*

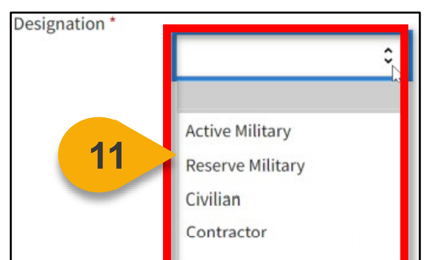


Hover over the SSN heading to understand the requirement of providing your SSN.

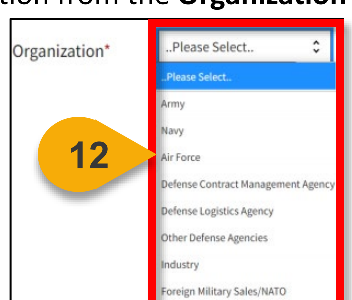
Step 10: Enter your **First** and **Last Name** in the corresponding fields.



Step 11: Select your designation from the **Designation** dropdown.



Step 12: Select your organization from the **Organization** dropdown.



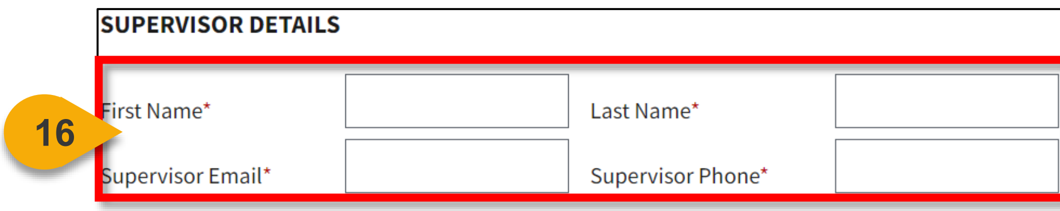
Request an Account Using the SAAR Form (Cont. 3)

Step 13: Select your sub organization from the **Sub Org** dropdown.

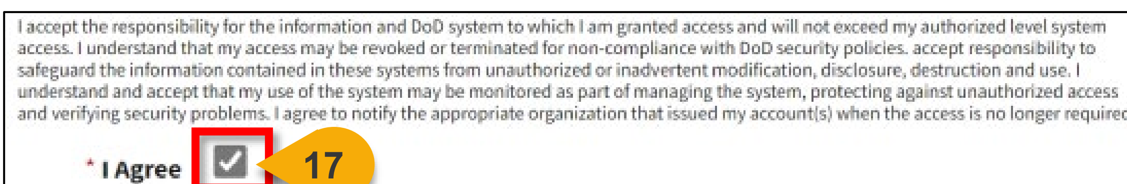
Step 14: Enter your telephone number in the **Telephone** field.

Step 15: Enter your email address in the **Email** field.

Step 16: Complete all fields in the **Supervisor Details** section.



Step 17: Read the User Agreement and select the **I Agree** box.

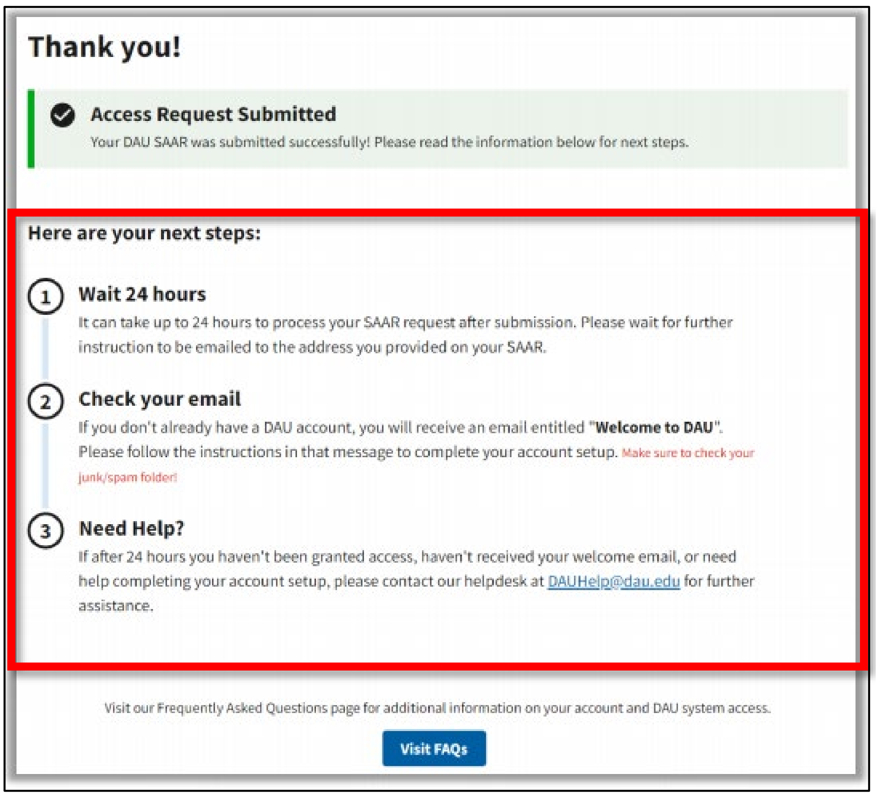


Step 18: Enter the captcha security code in the **Type the code from the image** field. **Note:** You may select the green arrows to generate a new code or select the green sound icon for the code to be read aloud.

Request an Account Using the SAAR Form (Cont. 4)

Step 19: Select the **Submit** button.

Step 20: Read the information on the **SAAR Thank You Page** regarding the next steps.

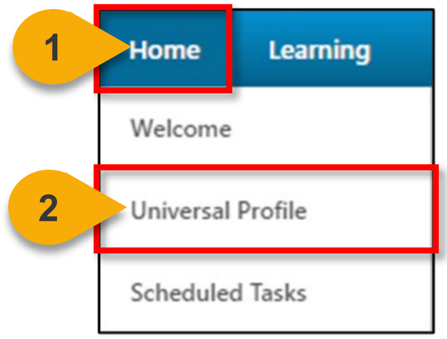


NOTE: The **Welcome to DAU** email expires 30 days after being sent. Once you receive the email, use access the DAU Account Setup page for support with the process of setting up your account.

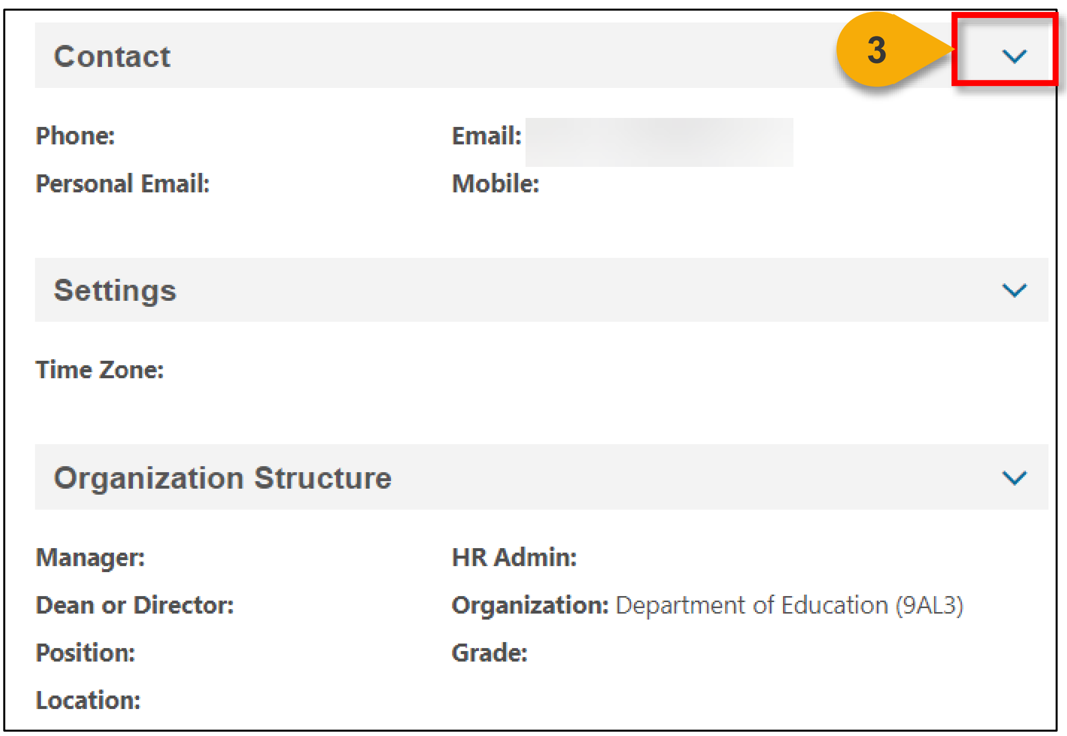
View User Record

When you want to view your User Record…

Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



Step 3: To expand a section on the User Record page, click on the **arrow** to the right of that section.



User Record Fields

When you want more information on User Record fields…

The following data elements are on the User profile for the Federal Acquisition workforce members. To update your User Record information, refer to the next task aid in this document, Edit User Record via Advanced Form.

Prefix: Enter your prefix here, if applicable.

First Name: Enter your first name here (required). This is displayed on all course completion certificates and email notifications.

Middle Name: Enter your middle name here, if desired.

Last Name: Enter your last name here (required). This is displayed on all course completion certificates and email notifications.

Suffix: Enter your suffix here, if applicable.

User Name: This is your unique Username in CSOD. We recommend using your email address.

User ID: This is your unique identifier in CSOD. This is the number to reference when you contact the Help Desk. You cannot edit this field.

Contact Section:

Address Line 1: Enter the first line of your address here. This field is limited to 110 characters.

Address Line 2: Enter the second line of your address here, if applicable. This field is limited to 55 characters.

City: Enter your city here. This field is limited to 35 characters.

State: Enter your state here. This field is limited to 30 characters.

Zip: Enter your zip code here.

Country: Select your country from the drop-down menu.

User Record Fields (Cont. 1)

Phone: Enter your preferred work phone number here. This is the phone number used by the help desk.

Email Address: Enter your work email address here. This is the address that will receive all CSOD notifications.

Personal Email Address: Your personal email will not be used by FAI or CSOD. Please leave this field blank.

Settings Section

Time Zone: Select your time zone from the drop-down menu.

Organization Structure Section

Manager: This field is not editable by end Users. Please view the “Update Manager” task aid for directions on how to update your manager via the “My Account” page.

HR Admin: This field will not be used by employees of Federal Organizations. Please leave blank.

Dean or Director: This field will not be used by employees of Federal Organizations. Please leave blank.

Organization ID: Select your organization from the options in the pop-up (required). The accuracy of this field is critical to your CSOD experience.

Position: This field will not be used by employees of Federal Organizations. Please leave blank.

User Record Fields (Cont. 2)

Grade: Select your grade from the pop-up. If you are not in the General Schedule, you will find your grade under the FAI_Grade category.

Location: This field will not be used by employees of Federal Organizations. Please leave blank.

Defense Acquisition Workforce Information Section

This section is used by other organizations in CSOD. Federal Organization's employees will not see fields in this section.

Defense Security Cooperation Workforce

This section is used by other organizations in CSOD. Federal Organization's employees will not see fields in this section.

Federal Acquisition Workforce

Acquisition Workforce (AWF): Use this drop-down field to identify as a member of the Federal Acquisition Workforce.

Contracting Officer's Representative (COR): Use this drop-down field to identify as a COR on a contract.

Other Demographics

Disability: Check this field to indicate you require reasonable accommodations.

Citizen Type: Select your citizenship type. This form is initially populated by your SAAR Access Request Form.

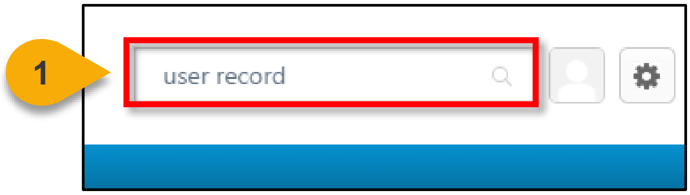
Organization Designation: Select your Organization Designation from the drop-down menu. This form is initially populated by your SAAR Access Request Form.

Job Series: Enter your Job Series to identify your occupational job family (example: 1102)

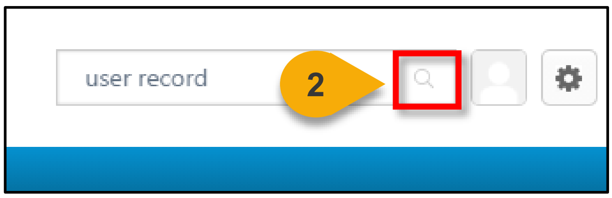
Edit User Record via Advanced Form

When you want to edit the User Record using Advanced Forms…

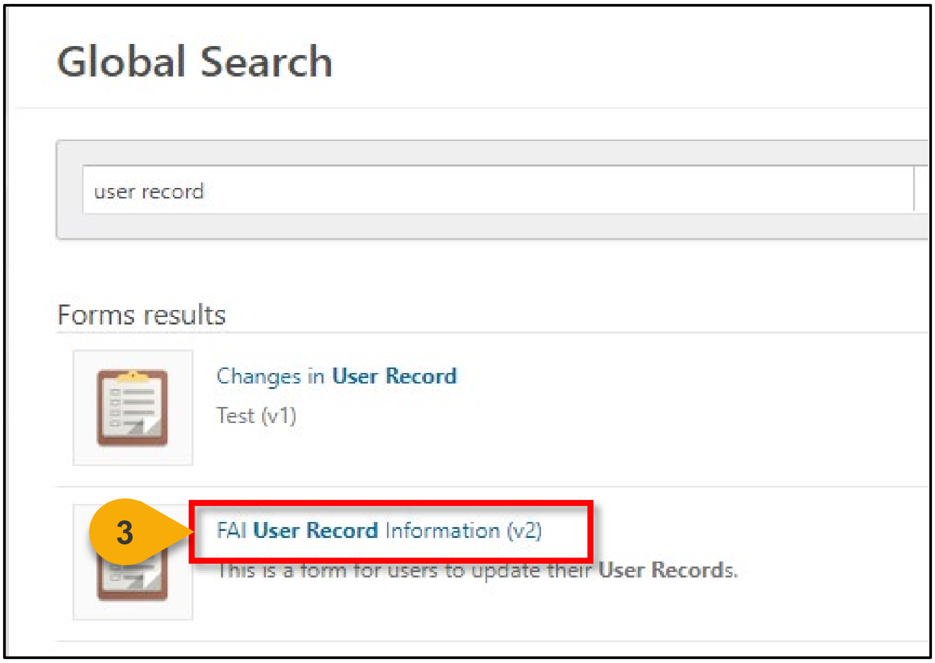
Step 1: Type **User Record** into the Global Search box.



Step 2: Click the **Magnifying Glass** to search.

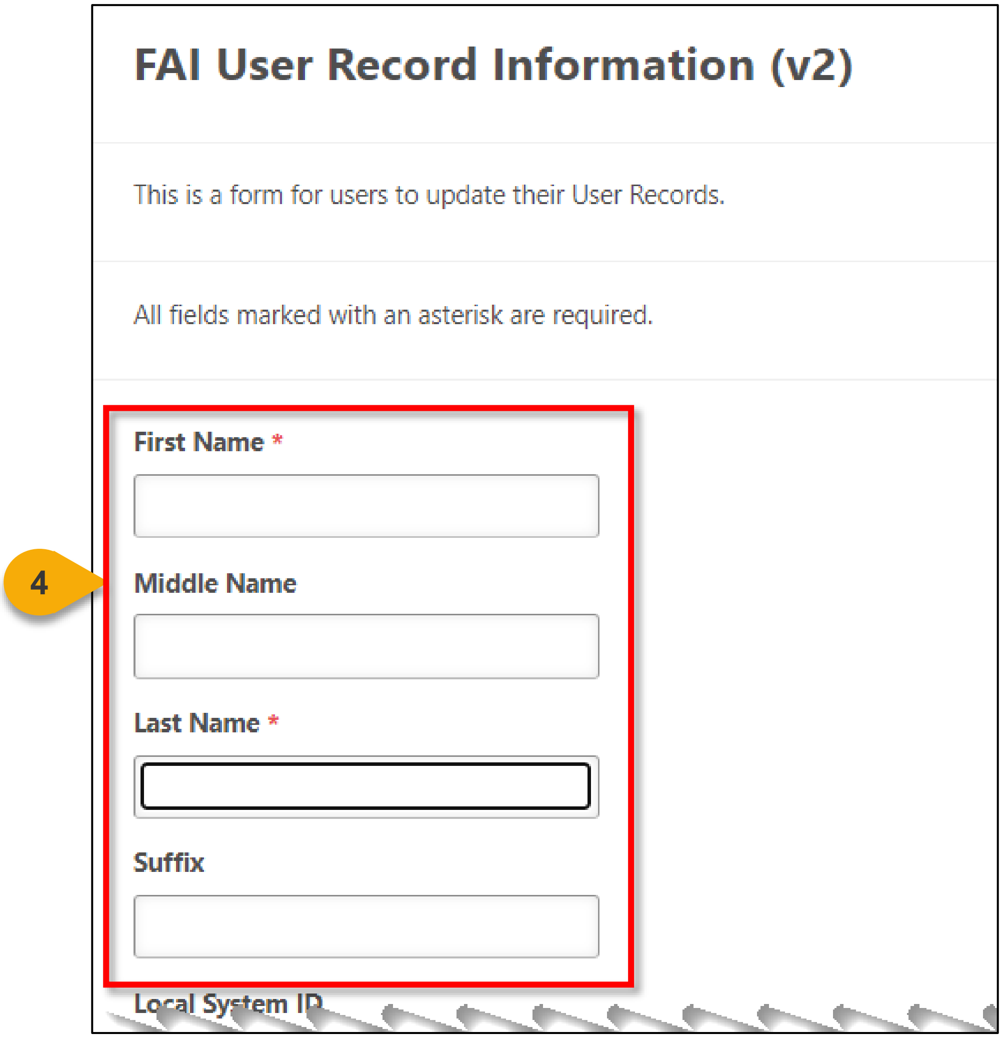


Step 3: In the search results click the form name, **FAI User Record Information** to open the form.

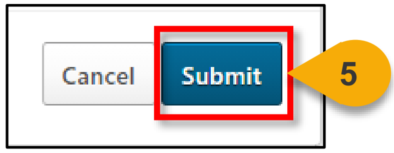


Edit User Record via Advanced Form (Cont. 1)

Step 4: Fill in the form. Fields with an * are required.



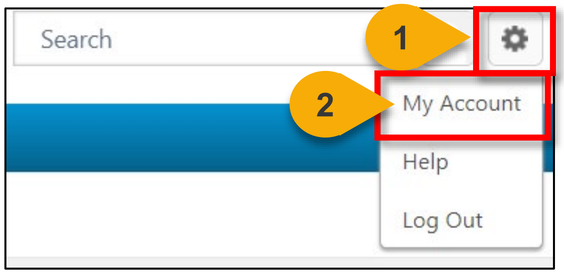
Step 5: When you are finished click **Submit**. You will see the changes reflected on your User Record immediately.



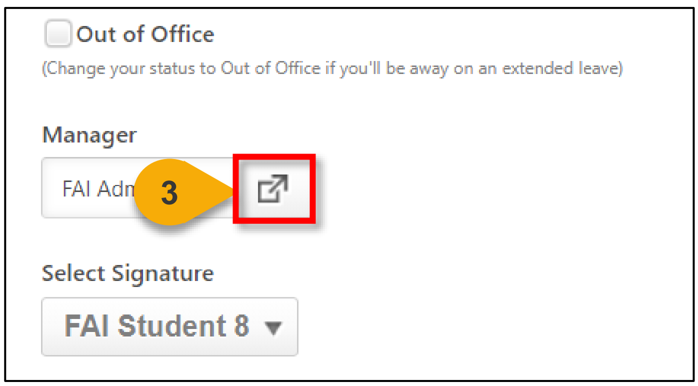
Update Manager

When you want to update your supervisor/manager in CSOD…

Steps 1 & 2: Hover over the **Gear icon** in the top right of your page and click **My Account.**



Step 3: The Preferences page will open. Click the **pop-out icon** next to your current supervisor/manager's name.

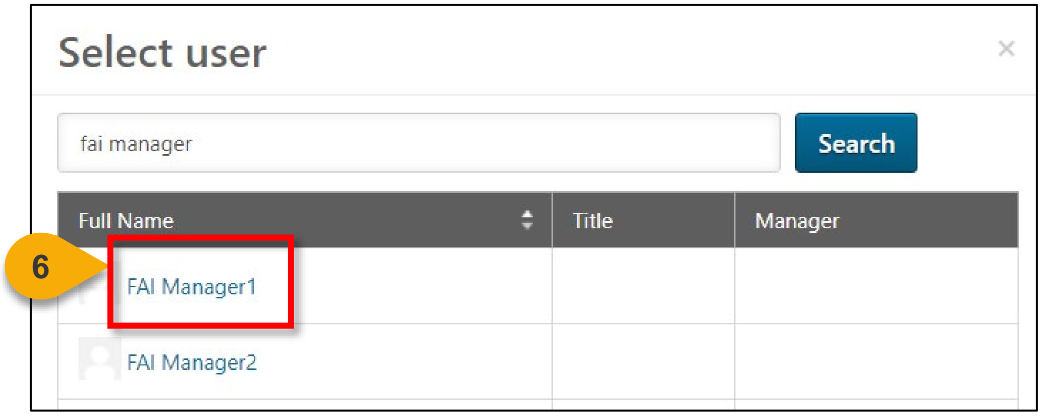


Step 4: A new window will open. Type your supervisor/manager's name into the **Search for people box**.

Step 5: Click **Search**.

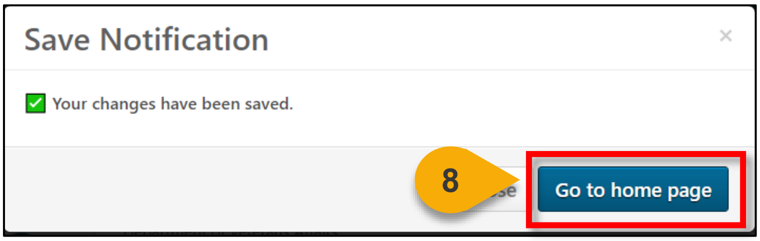
Update Manager (Cont. 1)

Step 6: All Users with that name will appear. CSOD only provides you with a few details to differentiate these Users. If you know your manager/supervisor's manager, that can help you distinguish between Users. Click the User's **name** to add them as your supervisor/manager.



Step 7: You will be returned to the Preferences page. Click **Save**.

Step 8: A pop-up will appear and let you know your changes were saved. Click **Go to home page** to be returned to the Welcome page.

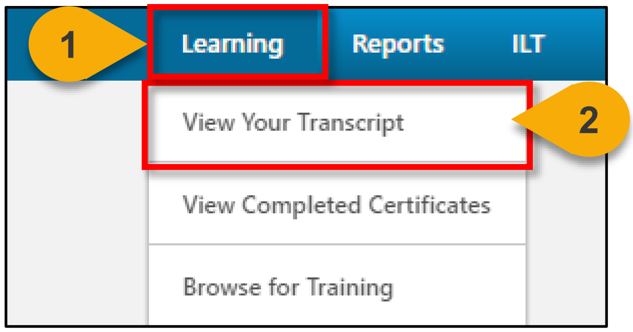


To confirm you have selected the correct supervisor/manager, use the "View User Record" task aid to view the Manager field. This will display the DAU ID of the individual you selected. Contact your manager to confirm you have selected the correct User.

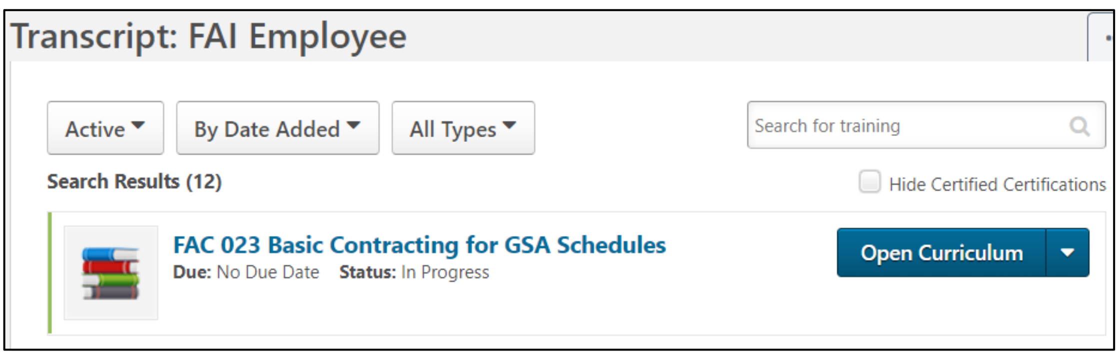
View User Transcript

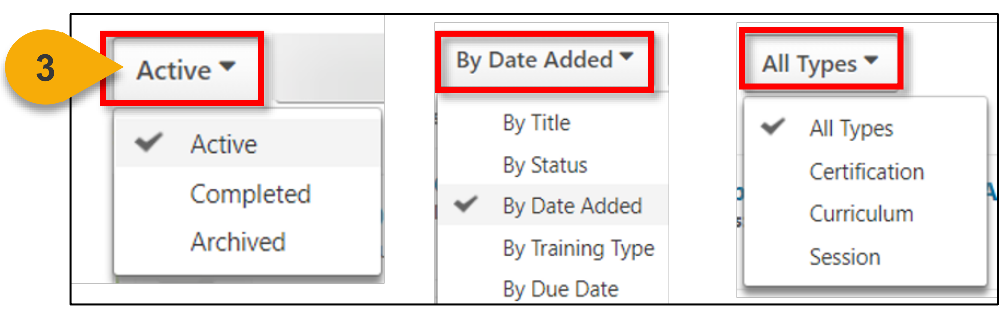
When you want to view your Transcript…

Steps 1 & 2: Hover over the **Learning tab** and then select **View Your Transcript.**



Step 3: You will be taken to your Transcript. You can click the **dropdown arrow** filter to show Active, Completed, and Archived courses. By default, only active courses you have not completed will be listed. Click on the **arrows** by each filter for dropdowns to sort the courses.

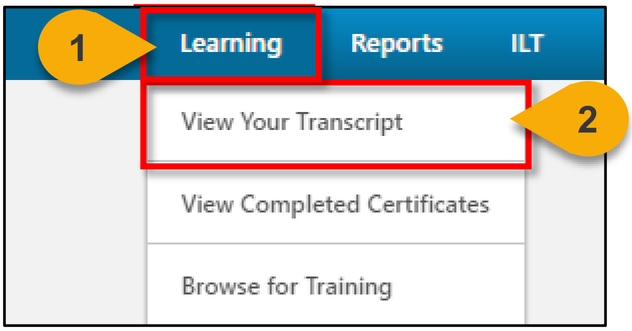




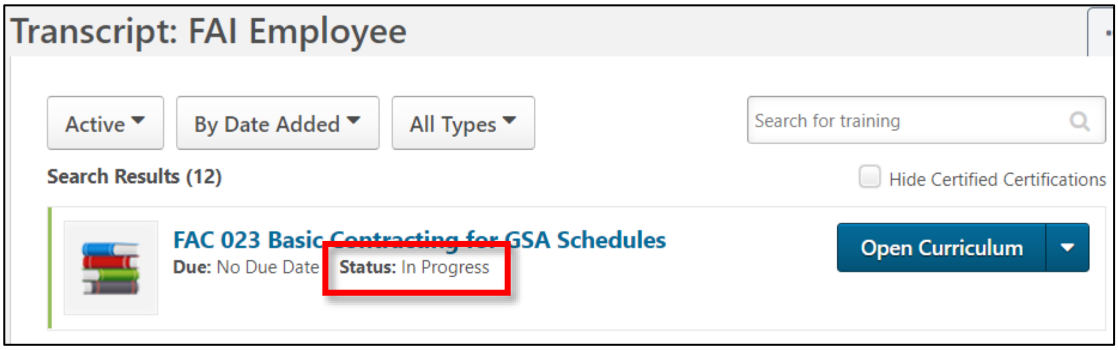
View Transcript Status

When you want to view your Transcript status…

Steps 1 & 2: Hover over the **Learning tab** and then select **View Your Transcript**.



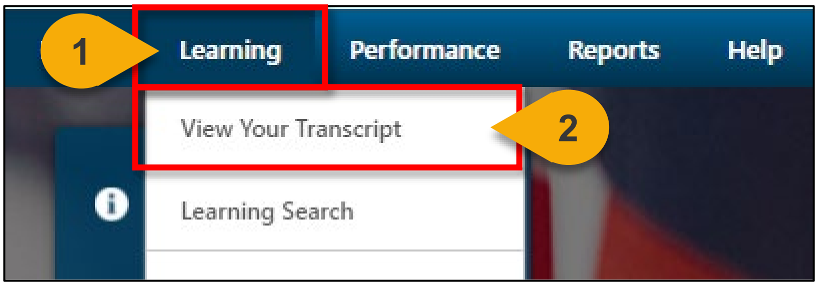
Your Transcript will display in the screen. The **status** of your courses will be listed underneath the title of the course.



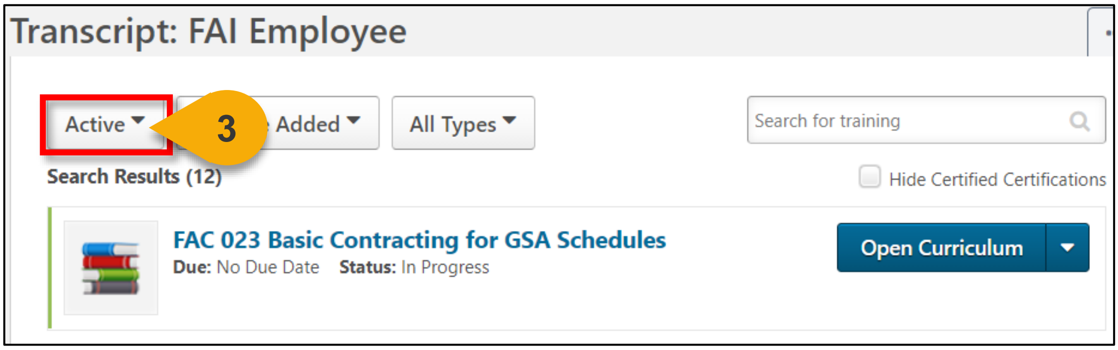
View CLPs on Completed Transcript

When you want to see how many CLPs were credited for a course…

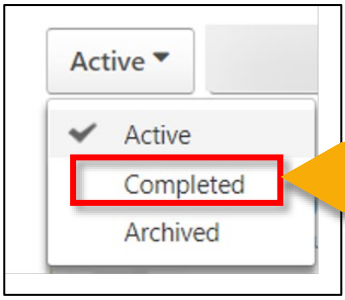
Steps 1 & 2: Hover over the **Learning** tab and select **View Your Transcript.**



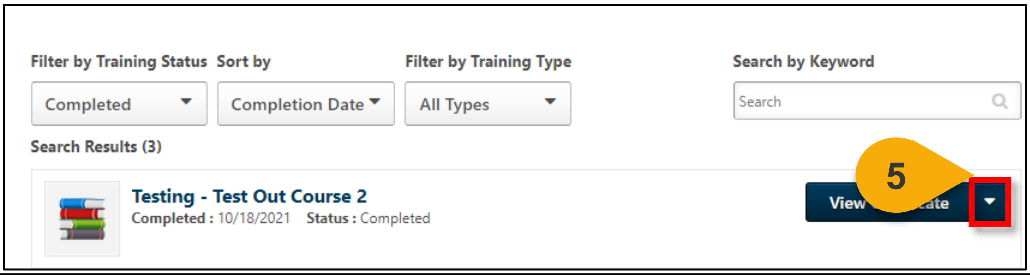
Step 3: Click the **Active** button to toggle to the Completed Transcript.



Step 4: Choose **Completed**.

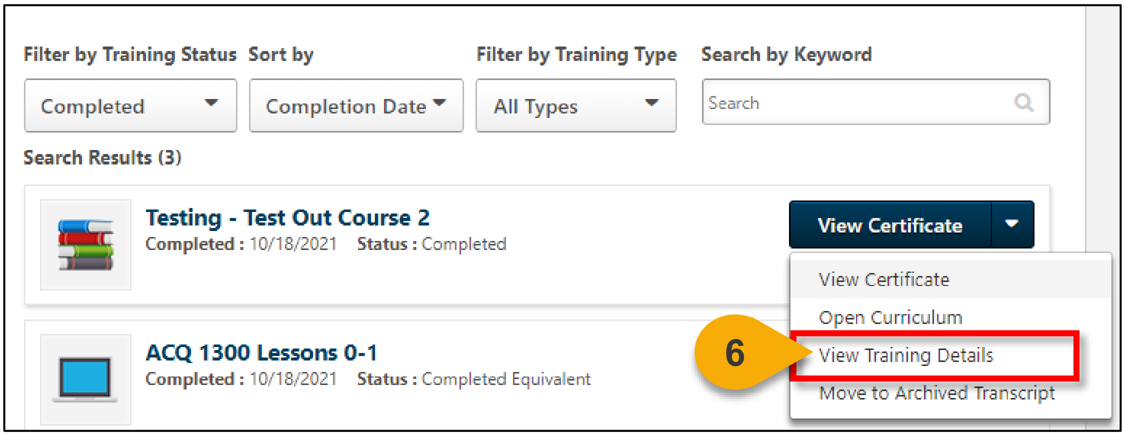


Step 5: Click the **dropdown arrow** next to the View Certificate button.

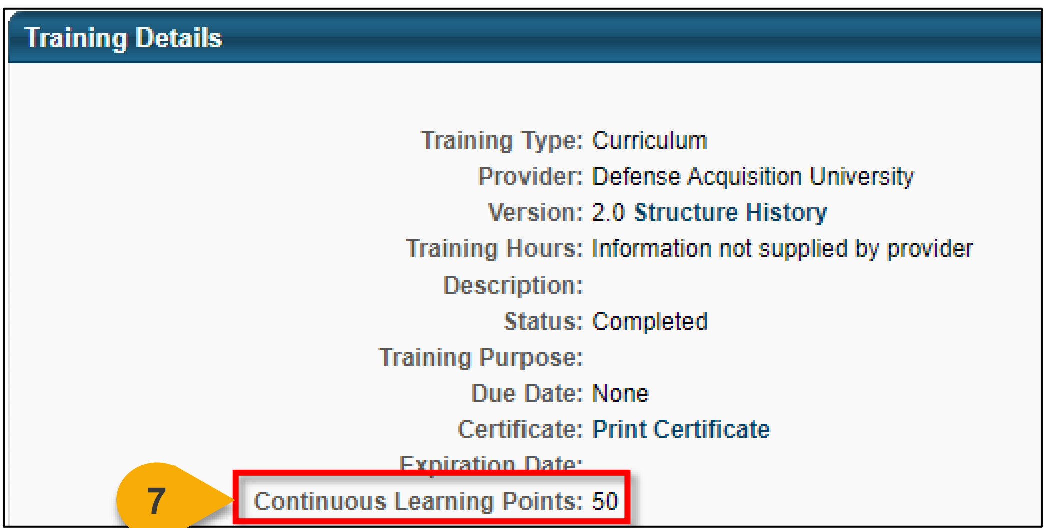


View CLPs on Completed Transcript (Cont.1)

Step 6: Click **View Training Details.**



Step 7: Your earned CLPs will be displayed on the screen in the **Continuous Learning Points** field.



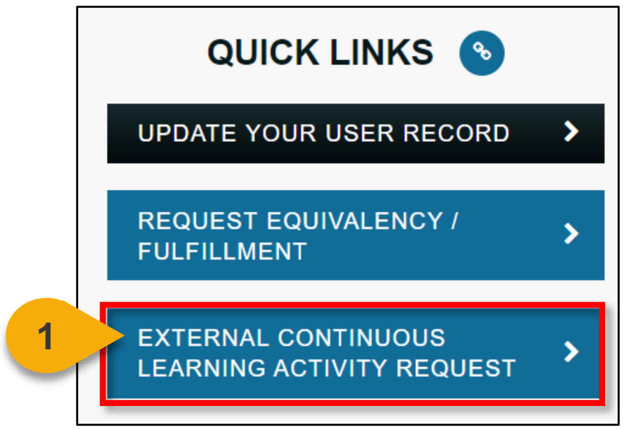
Continuous Learning

Submit External Continuous Learning (CL) Activity Request

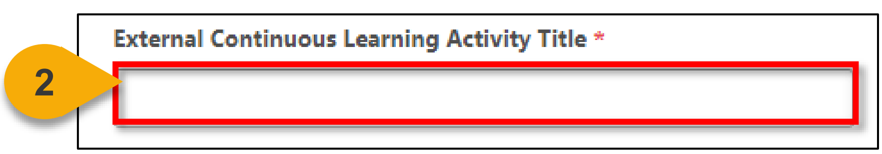
When you need to account for externally obtained CLPs…

Please see page 86 for more guidance on when to use External Continuous Learning (CL) Activity Requests vs. Equivalent/Fulfillment Requests.

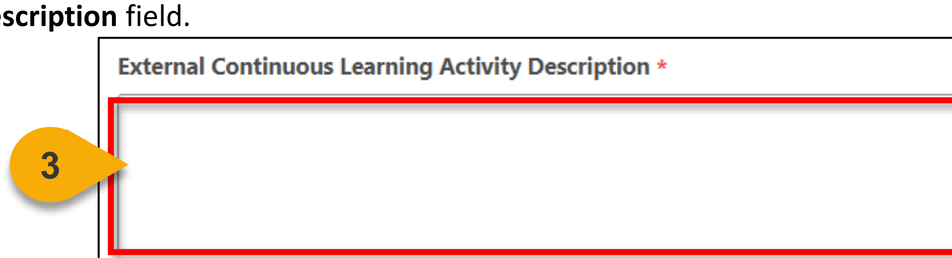
Step 1: Click the **External Continuous Learning Activity Request** button under the Quick Links section of the Welcome Page.



Step 2: You will be redirected to the "Add External Training" form. Fields with an * are required. Enter the activity title in the **External Continuous Learning Activity Title** field.

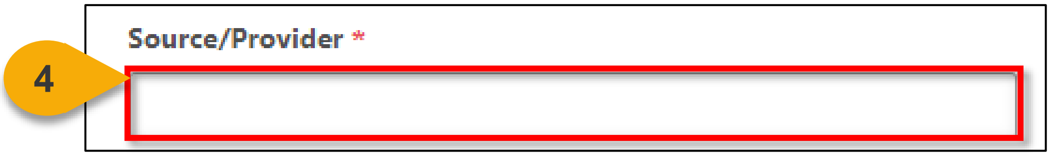


Step 3: Enter an activity description in the **External Continuous Learning Activity Description** field.

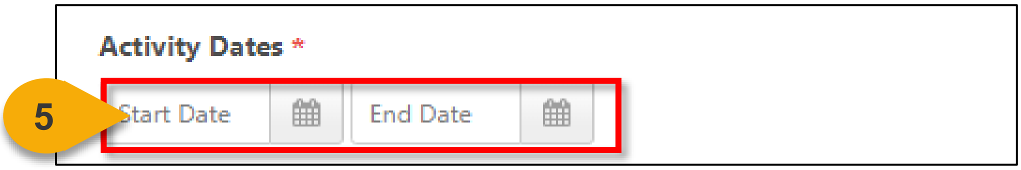


Submit External CL Activity Request (Cont. 1)

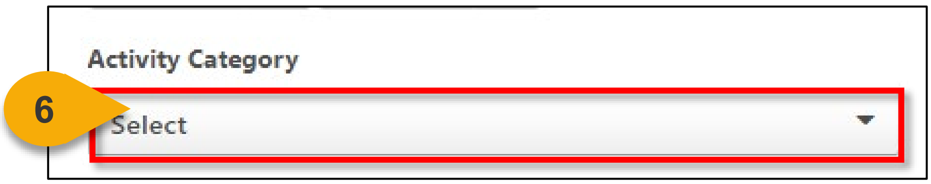
Step 4: Enter a source or provider of the activity in the **Source/Provider** field.



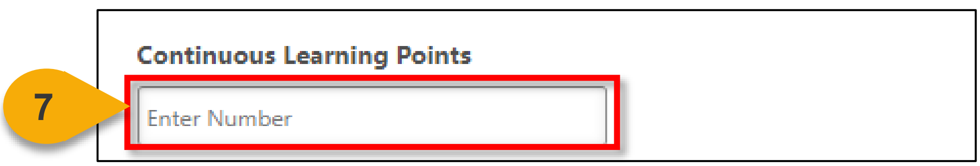
Step 5: Add when the activity occurred in the **Activity Dates**.



Step 6: Choose a category from the **Activity Category** dropdown.



Step 7: Enter the Continuous Learning Points (CLPs) this activity was worth in the **Continuous Learning Points** field.

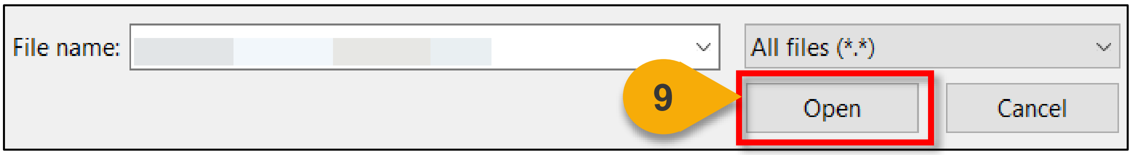


Step 8: Click **Select a File** to attach proof of completion (examples include a certificate of completion, transcript from source/provider, grade from educational institute, etc.).

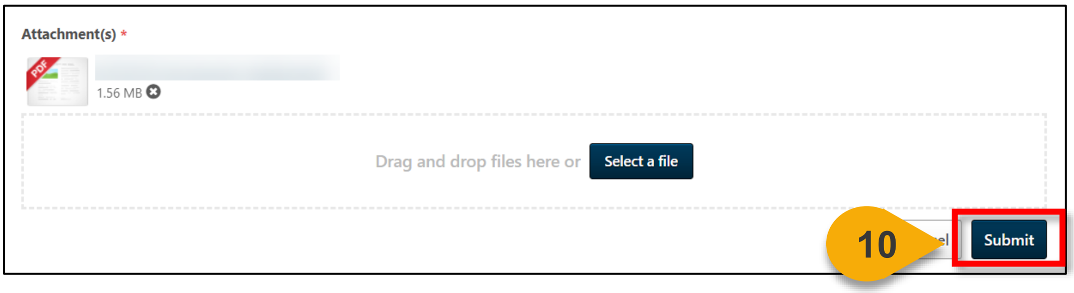
<u>Note</u>: Each attachment is limited to 1 MB, with a maximum of 15 attachments. The file name of the attachment cannot exceed 45 characters or an error stating that the file name is too long will result. Prior to uploading, rename the file to shorten its title if necessary.

Submit External CL Activity Request (Cont. 2)

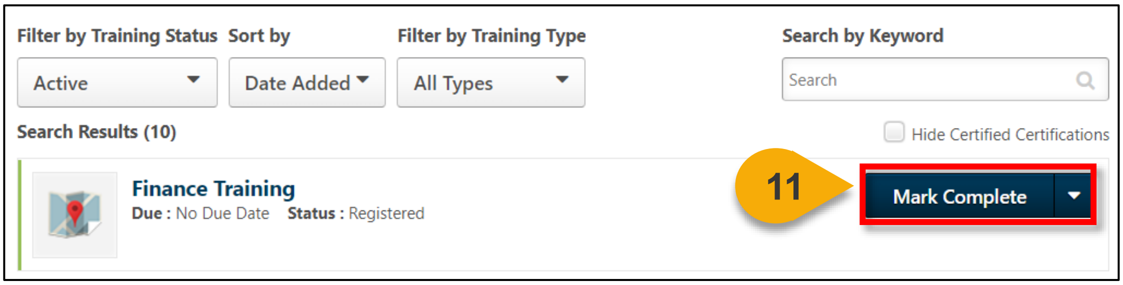
Step 9: Select the file and click **Open**. Allow the file to load.



Step 10: Click **Submit** to submit your External Continuous Learning Activity Request.



Step 11: You will be re-directed to your Active Transcript. Locate the External Continuous Learning Activity Request added and click the **Mark Complete** button.



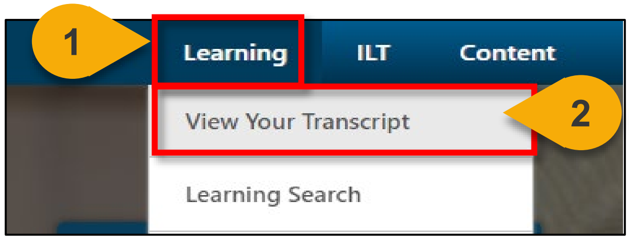
Note: If the activity is in the future, you will not be able to select Mark Complete until after the end date has passed.

The activity will be routed for agency approval and display on your Completed Transcript when approved.

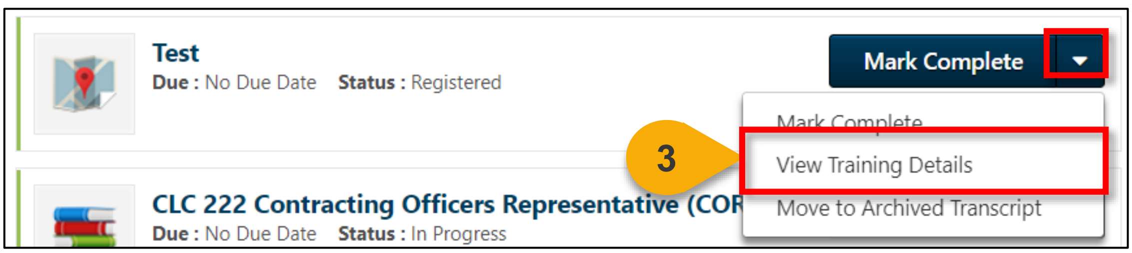
Edit External CL Activity Request Prior to Approval

When you need to edit your Request prior to Approval…

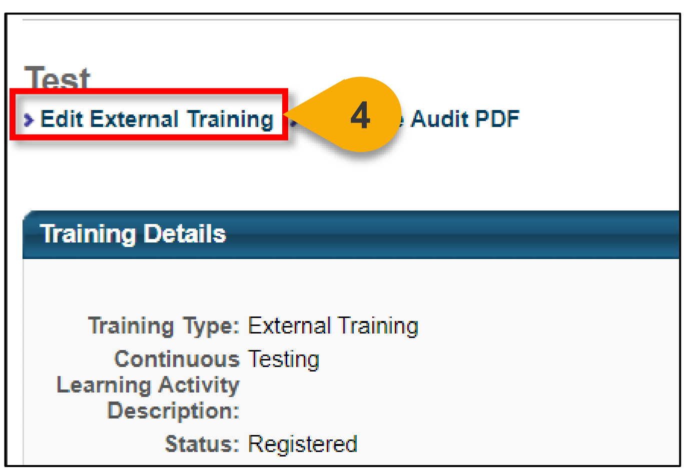
Steps 1 & 2: Hover over the **Learning** tab and select **View Your Transcript.**



Step 3: From the Active transcript, click the dropdown arrow beside the Mark Complete button and select **View Training Details**.

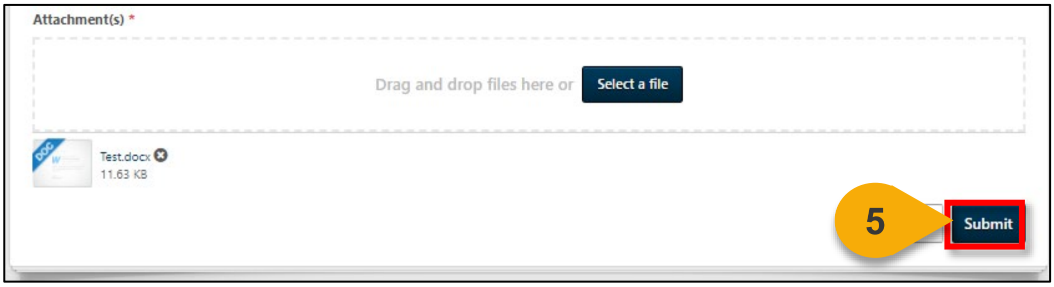


Step 4: Click **Edit External Training**.

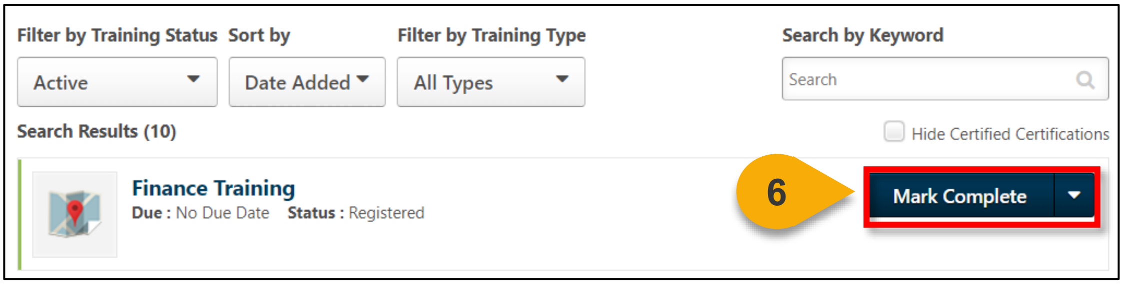


Edit External CL Activity Request Prior to Approval (Cont. 1)

Step 5: Make the necessary edits and click the **Submit** button.



Step 6: If you had not completed the step of Mark Complete yet, you will be re-directed to your Active Transcript. Locate the External CL Activity and click the **Mark Complete** button. If your activity has not yet taken place, you will not have this option until the end date for the activity has passed.



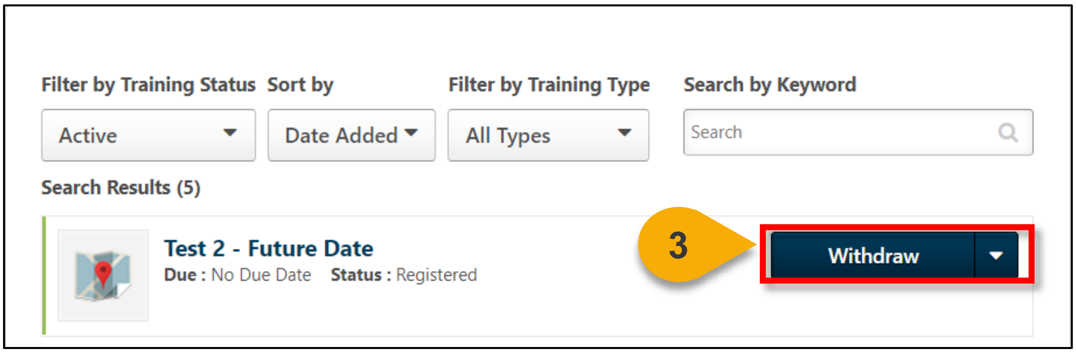
The activity will be routed for agency approval and display on your Completed Transcript when approved. If denied, the denial will show on your Active Transcript.

Withdraw Future Dated External CL Activity Request

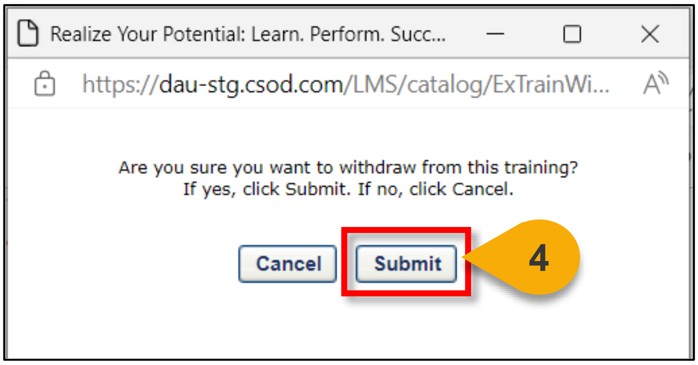
When you need to withdraw a future External CL Activity Request…

Steps 1 & 2: Hover over the **Learning** tab and select **View Your Transcript.**

Step 3: Find the future dated External Continuous Learning Activity Title on your Active Transcript and click the **Withdraw** button.

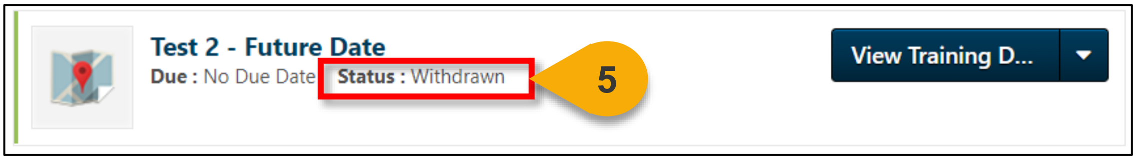


Step 4: In the pop-up window, click **Submit** to withdraw this External Continuous Learning Activity Title.



Withdraw Future Dated External CL Activity Request (Cont. 1)

Step 5: The status of that External Continuous Learning Activity Title with now reflect Withdrawn.

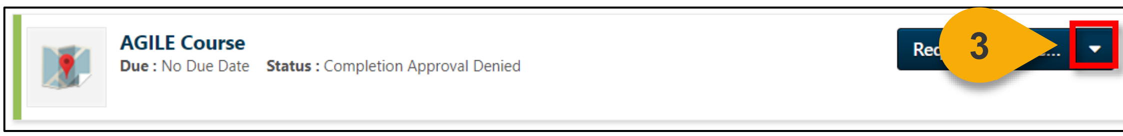


Resubmit Denied External CL Activity Request

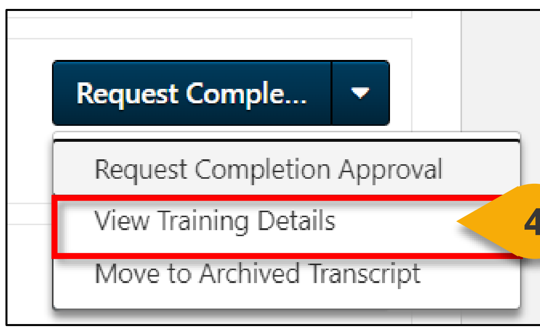
When you need to resubmit a denied External CL Activity Request…

Steps 1 & 2: Hover over the **Learning** tab and select **View Your Transcript.**

Step 3: Find the denied External Continuous Learning Activity Title on your Active Transcript and click the **dropdown arrow** next to the Request Completion button**.**



Step 4: In the dropdown menu, select **View Training Details**.

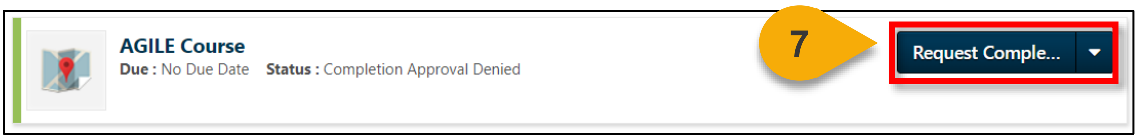


Step 5: Select **Edit External Training** under the training title.

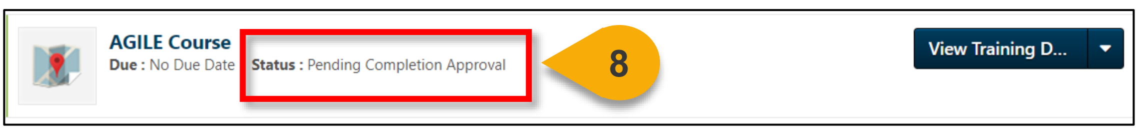
Resubmit Denied External CL Activity Request (Cont. 1)

Step 6: Edit your form responses as needed then click **Submit.**

Step 7: You will be returned to your Active transcript. Locate the denied training again and click the **Request Completion Approval button**.



Step 8: The status for the training will change from Completion Approval Denied to **Pending Completion Approval**.



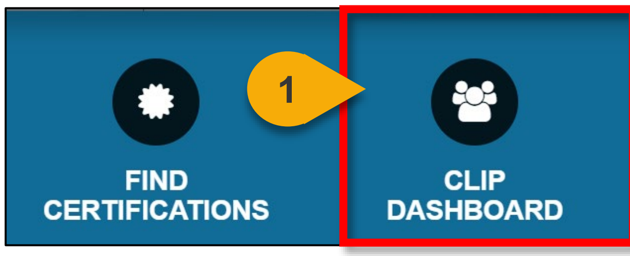
The activity will be routed for agency approval and display on your Completed Transcript when approved.

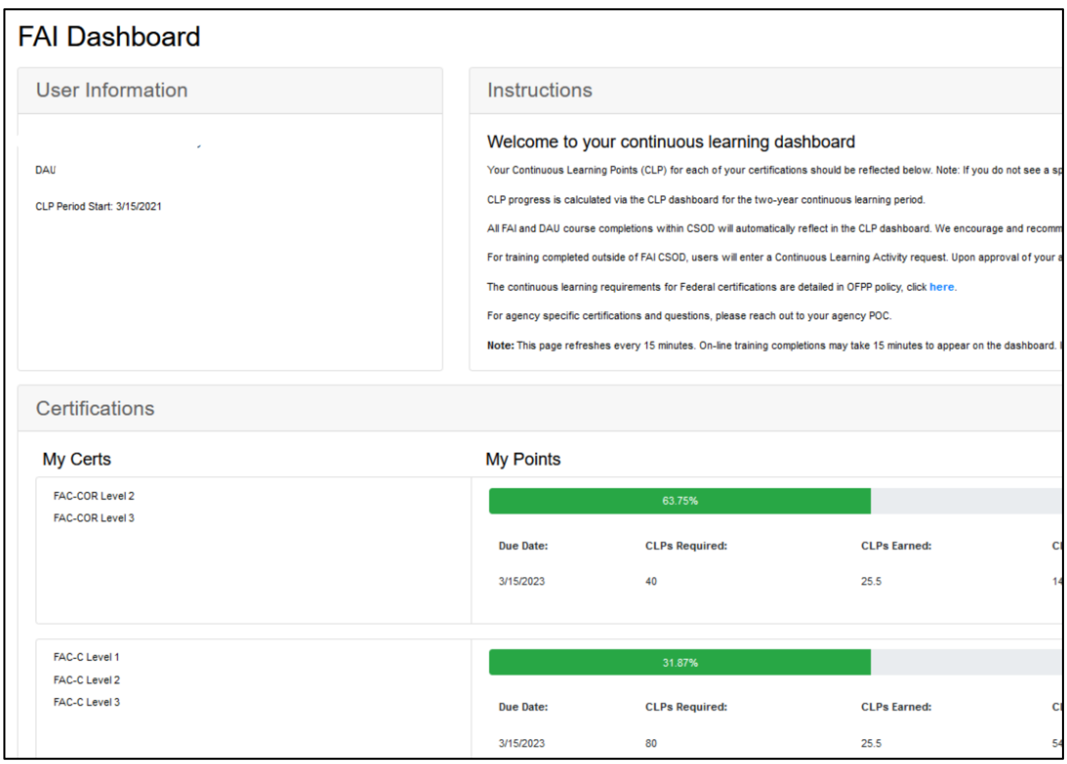
Accessing and Reviewing Your CLIP Dashboard

When you want to view your CLP accrual…

The Continuous Learning Individual Progress (CLIP) Dashboard will show your progress toward Continuous Learning Point (CLP) accrual for your completed Certifications that require 8, 40, or 80 CLPs. The CLIP Dashboard will only show your current CL Period at this time.

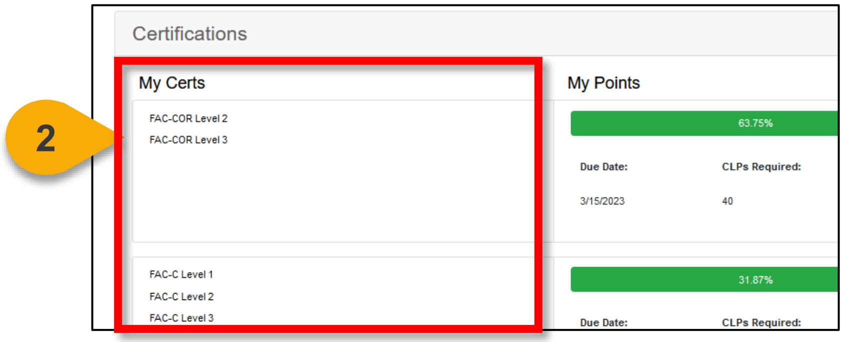
Step 1: From your Welcome page, click the **CLIP Dashboard** tile. A new tab will open with your personal CLIP Dashboard (example shown below).



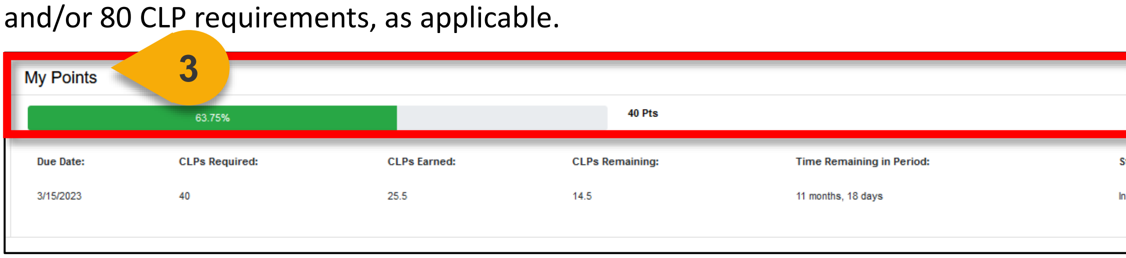


Accessing and Reviewing Your CLIP Dashboard (Cont. 1)

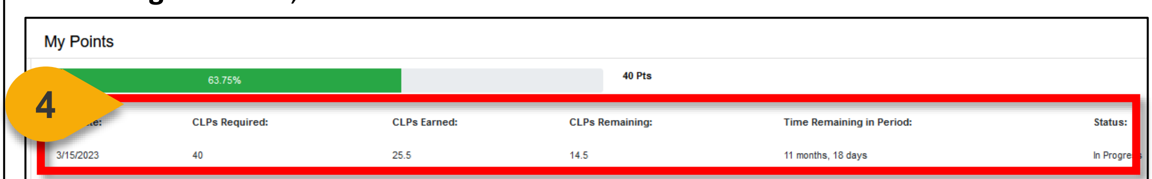
Step 2: In the **My Certs** section, you will see your certifications, grouped by how many CLPs are required to maintain them.



Step 3: In the **My Points** section you will see your CLP accrual towards the 8, 40, and/or 80 CLP requirements, as applicable.



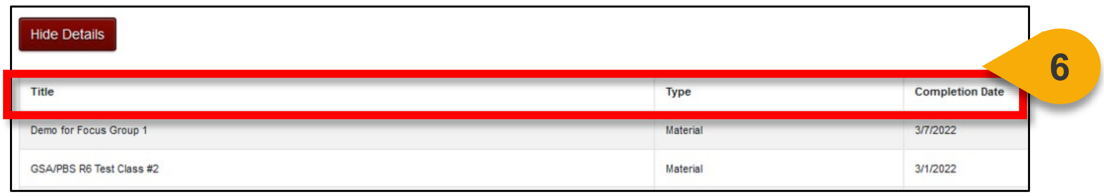
Step 4: Beneath each bar you will see additional information and details about your CLP accrual such as **Due Date**, **CLPs Required**, **CLPs Earned**, **CLPs Remaining**, **Time Remaining in Period**, and **Status**.



Step 5: At the bottom of the page, click the **View Details** to view which courses are crediting towards your CLP accrual.

Accessing and Reviewing Your CLIP Dashboard (Cont. 2)

Step 6: In the View Details section you can see information about each Learning Object that is crediting your CLIP Dashboard including **Title**, **Type**, **Completion Date**, **Status** and **CLPs Earned**.



Step 7: At the top of the page, click the **Download button** to download a printable PDF of your CLIP Dashboard.

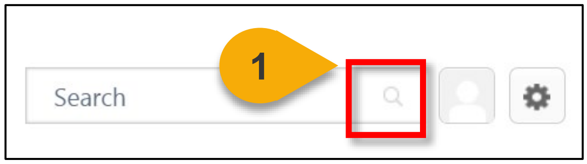
Online Training

Use Global Search

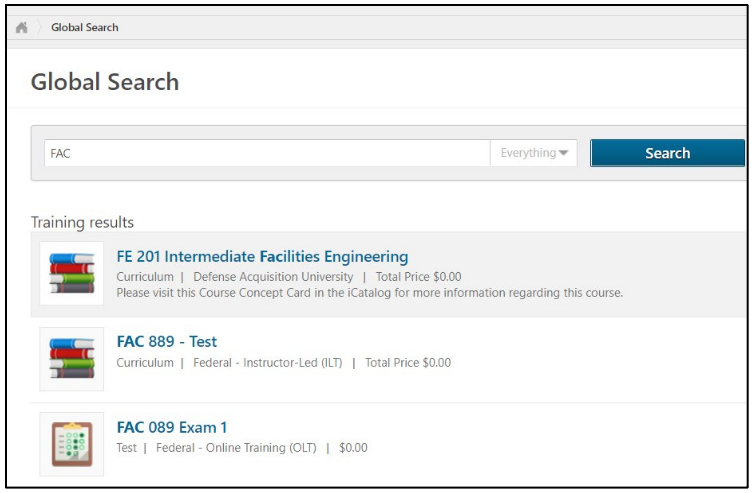
When you want to search for Training, Certifications, or Forms…

Global Search: This predictive search bar, found at the top right of the home page, helps Users search for training, certification and forms.

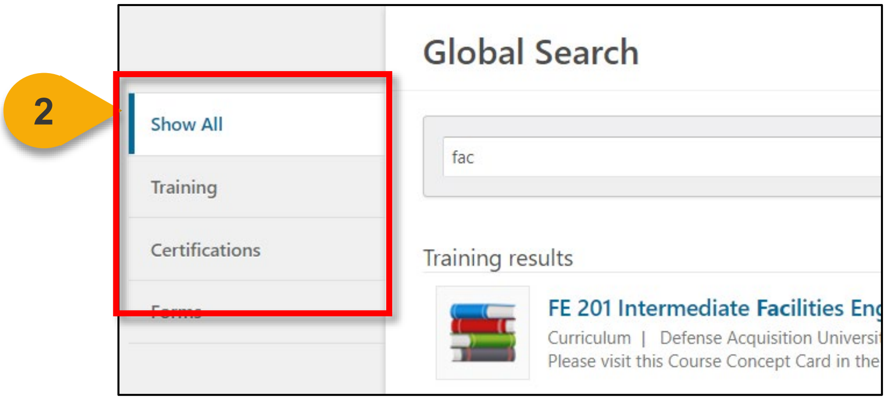
Step 1: Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



The page will refresh, and your results will be listed on the page.

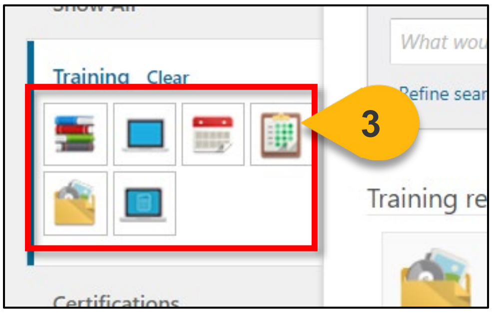


Step 2: To the left of the search bar, you can choose to filter by **Training, Certifications, or Forms** by clicking on any of these items.

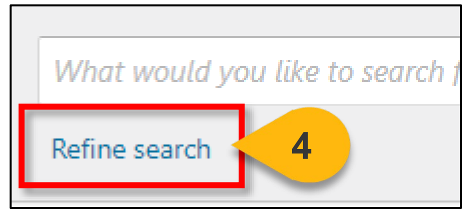


Use Global Search (Cont. 1)

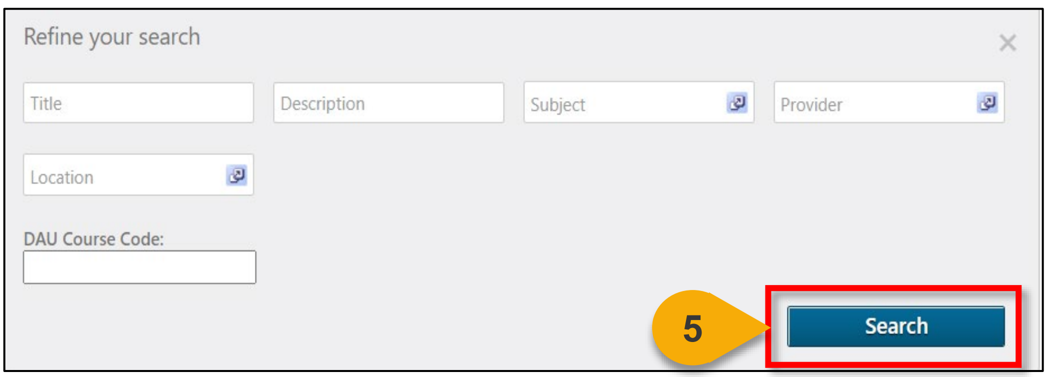
Step 3: When searching for training, click the Training filter to expand the menu further. Click **any Training Type** to filter by that type.



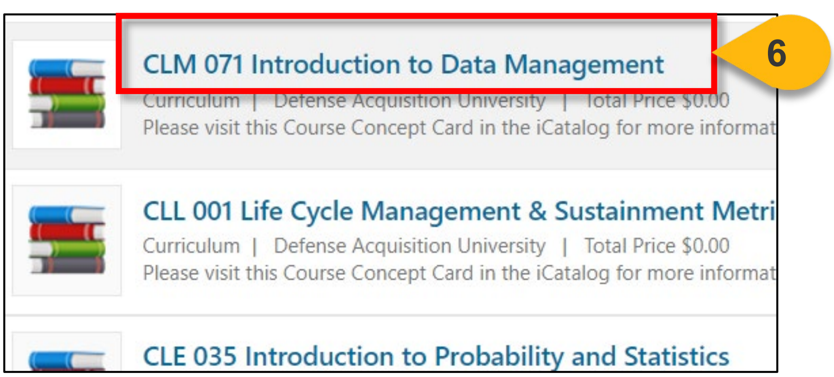
Step 4: The Refine Search option will appear under the search bar. Click **Refine Search** to view additional filters.



Step 5: Use any of the fields to refine your search and then click **Search**.



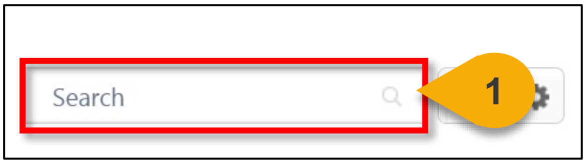
Step 6: To open any search result, click the search result **title**.



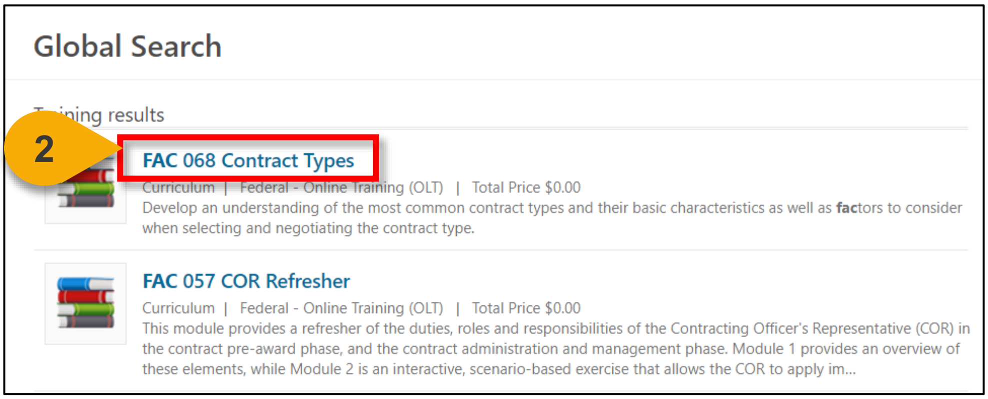
Register for Online Training (OLT)

When you want to register for Online Training…

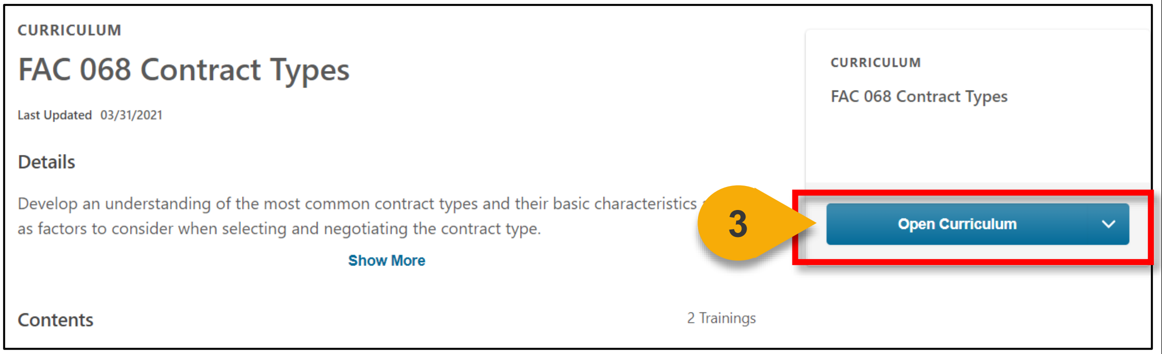
Step 1: Type the name of the OLT you would like to take into the Global Search box and click the **magnifying glass** or hit enter. See the “Use Global Search” task aid for more information on searching for training.



Step 2: Your search results will appear on the next page. Click the **title** of the OLT you would like to take.

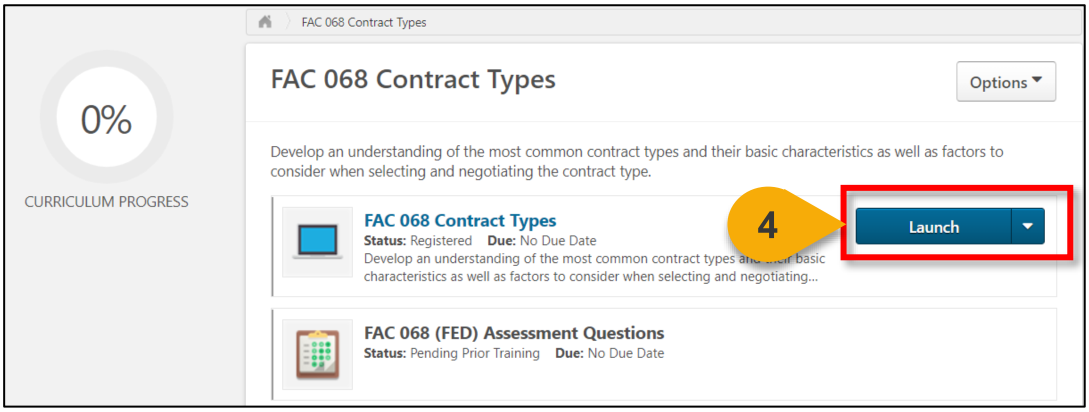


Step 3: Click the **Open Curriculum** button to register for the OLT. The course will then be added to your Transcript with a status of In Progress.



Register for Online Training (OLT) (Cont. 1)

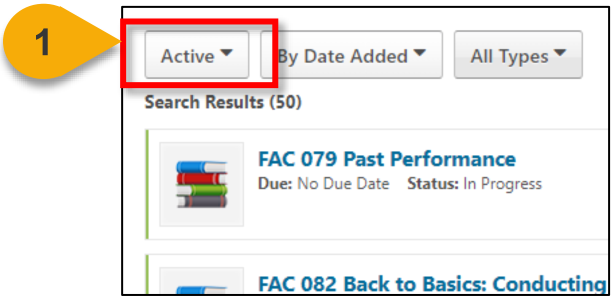
Step 4: The Curriculum Player page will show. You will see all components that are a part of the curriculum. Click **Launch** to start the training. The training will open in a new window.



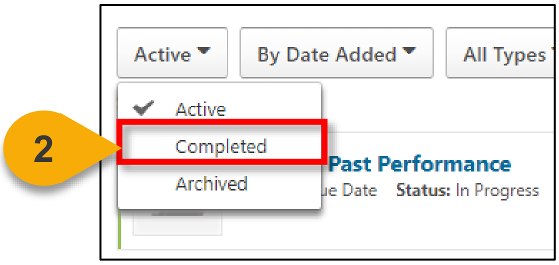
View Completion Certificate

When you want to view/download/print a completion certificate…

Step 1: Use the "View User Transcript" task aid to navigate to your Transcript. Click the **Active filter**.



Step 2: Select **Completed** to only view your completed training.



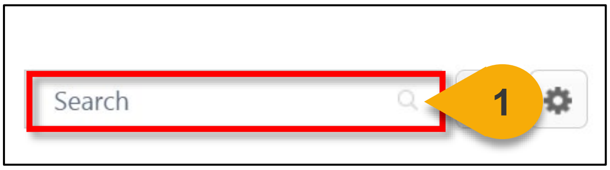
Step 3: Click **View Certificate** across from the Learning Object you wish to view a certificate for. The certificate will open in a new window.

Instructor-Led Training

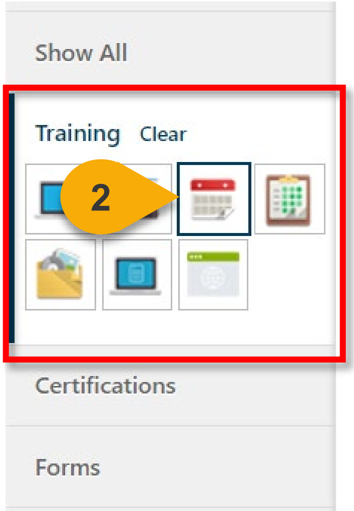
Register for Instructor-Led Training (ILT)

When you want to register for an Instructor Led Training…

Step 1: Use **Global Search** to find the instructor-led training course you'd like to take. Click on the magnifying glass.



Step 2: From the **Training** filters, select Event



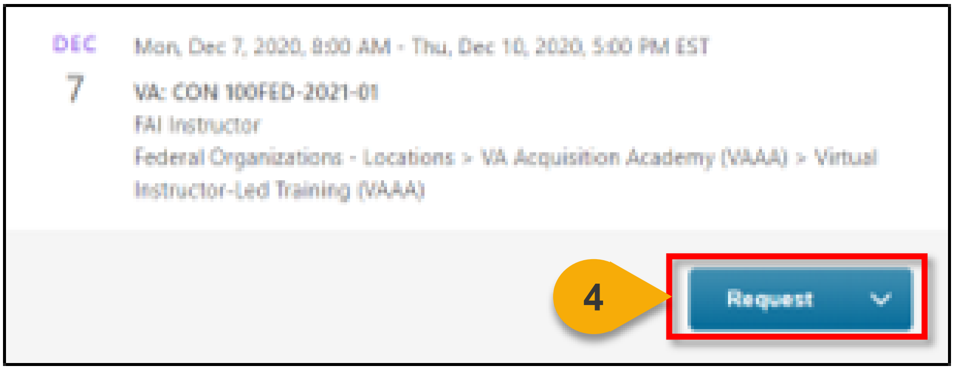
Step 3: Once the Event has been found**,** click the **Event name** to view the occurrences (Sessions) of that Event.

Register for Instructor-Led Training (ILT) (Cont. 1)

Step 4: Locate the Session you wish to enroll in. Depending on your Agency and the Session configurations you may see different options. Click **Request** or **Waitlist**. You will now be able to view the Session on your Transcript.

Request: This will enroll you in the Session. If you are a VA User enrolling in a VA Session, your spot in the course will be Pending Approval as the request is routed through the approval workflow.

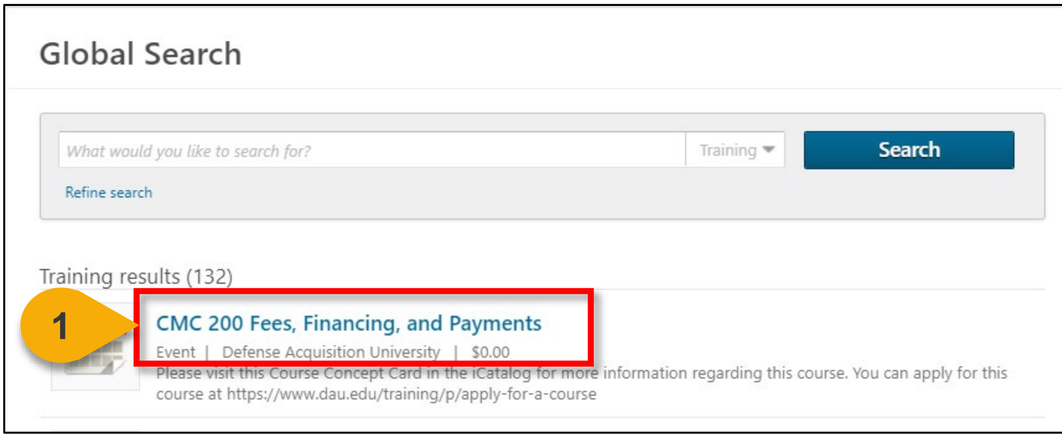
Waitlist: If you see the waitlist option, the Agency sponsoring this Session may not be allowing Users from your Agency at this time or the course may be full. Choose this option to be placed on the Waitlist for the Session.



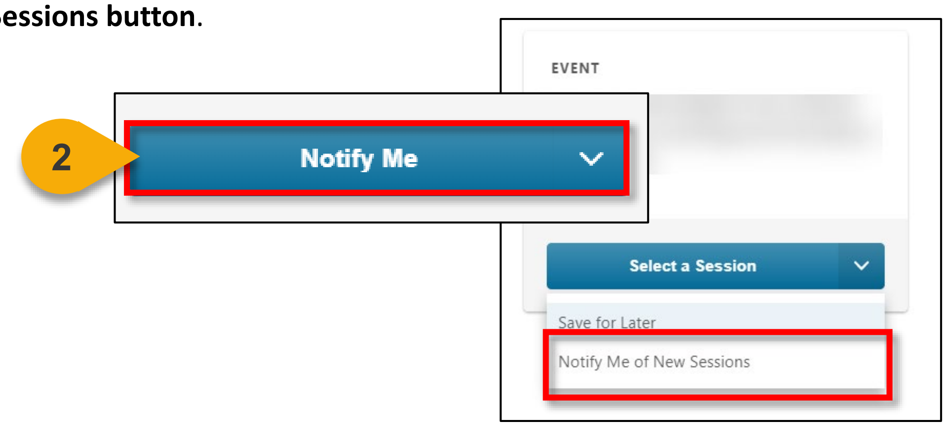
Indicate Interest in a Future Session

When interested in a course once new Sessions become available…

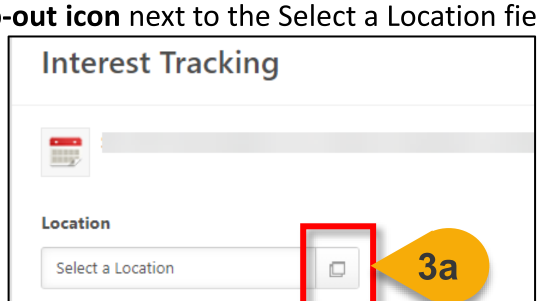
Step 1: Use Global Search to search for the course you'd like to take. Refer to the "Use Global Search" task aid. Click on the **Event Title**.



Step 2 : On the on the Event page, click either the **Notify Me** or **Notify Me of New Sessions button**.

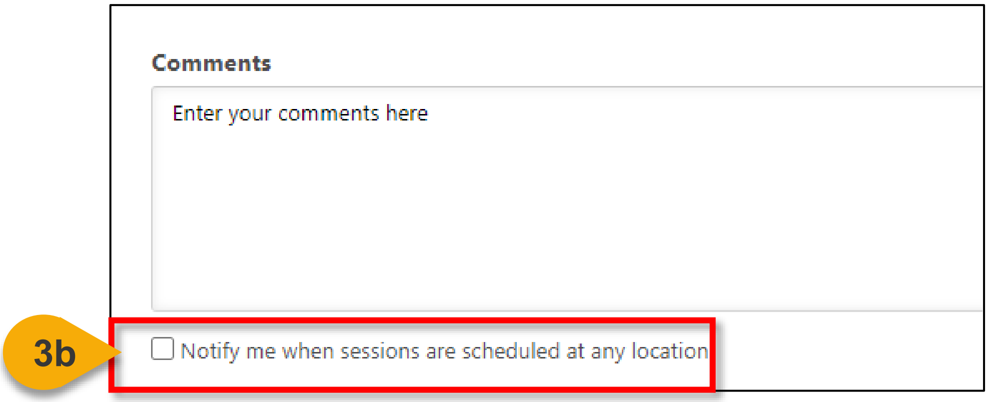


Step 3a: You have the option to select to be notified of Sessions held in a specific location. Click the **pop-out icon** next to the Select a Location field to do this.



Indicate Interest in a Future Session (Cont. 1)

Step 3b: To be notified for all sessions in any location, check the box next to **Notify me when sessions are schedule at any location**.

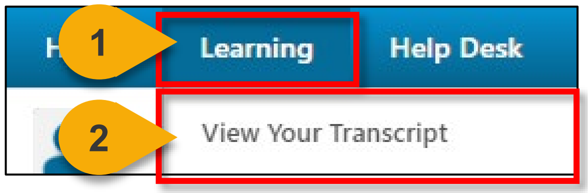


Step 4: Once you have completed selecting the location preferences, click the **Submit button** at the bottom of the page. You will receive an email notification when new Sessions are added that meet the location criteria you provided.

Withdraw from an ILT

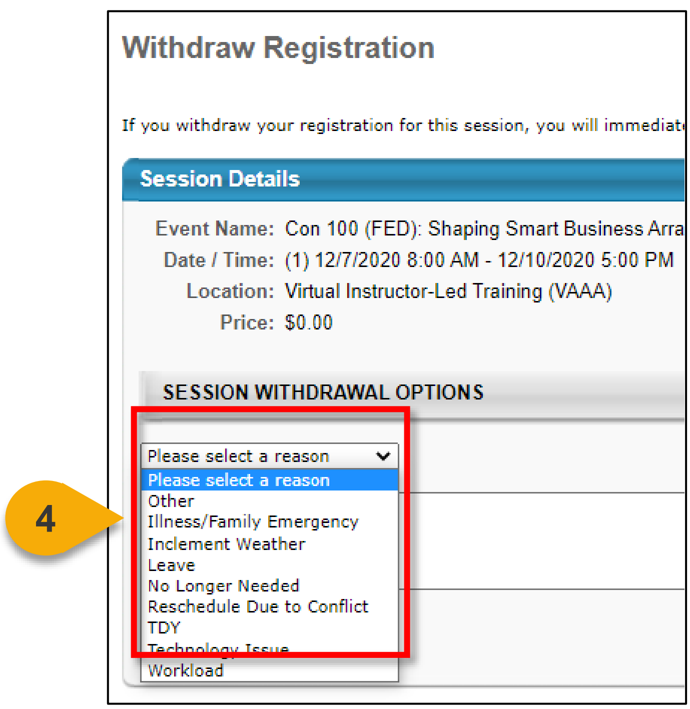
When you need to withdraw from an ILT course…

Steps 1 & 2: Hover over the **Learning tab** and select **View Your Transcript.**

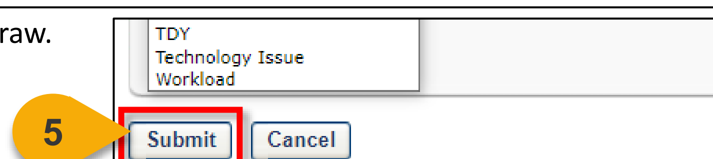


Step 3: Search for and find the course from which you wish to withdraw on your Transcript. Select **Withdraw**. **Note:** If Withdraw is not the option in the blue button, you may need to click the triangle to expand the menu.

Step 4: Select a reason for withdrawal in the **Please select a reason dropdown**.



Step 5: Click **Submit** to withdraw.

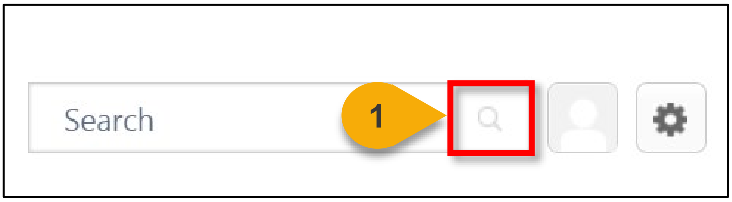


Equivalency & Fulfillment Forms

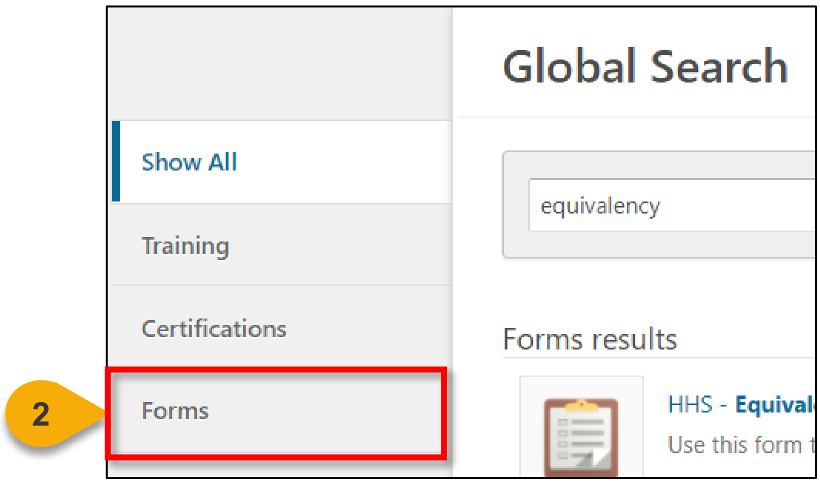
Submit an Equivalency/Fulfillment Form

When you want to request Equivalency or Fulfilment for a Course…

Step 1: Use Global Search to search for the keyword "Equivalency". Click the **Magnifying Glass** to search.



Step 2: Click on **Forms** to view only Forms in the results page.

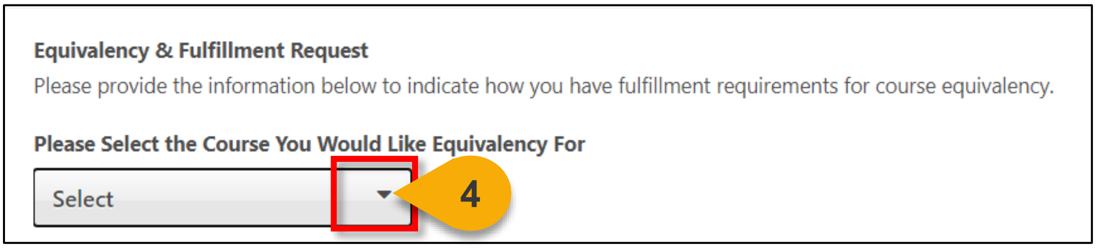


Step 3: Click on the **Equivalency/Fulfillment Form** for your Agency.

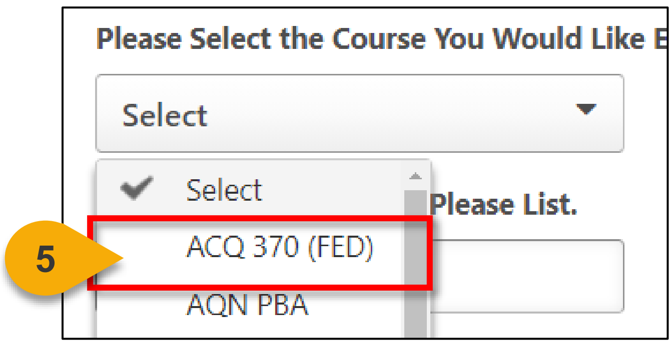
See page 86 for more information on when to use an Equivalent/Fulfillment Form.

Submit an Equivalency/Fulfillment Form (Cont. 1)

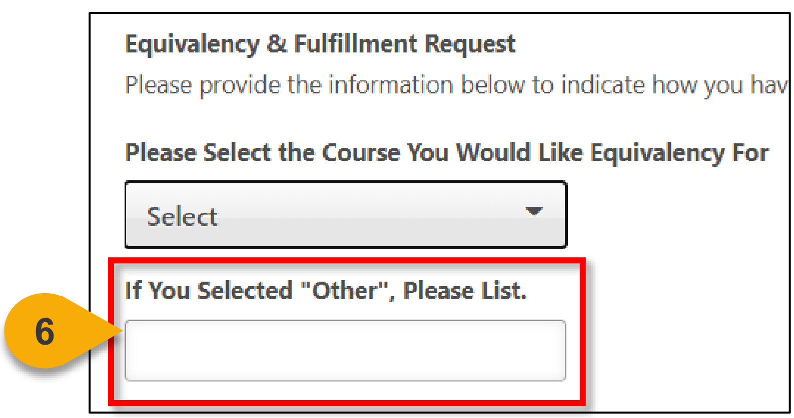
Step 4: Select the **dropdown arrow** to choose the course for which you would like an equivalency.



Step 5: Select the **course** from the dropdown menu.

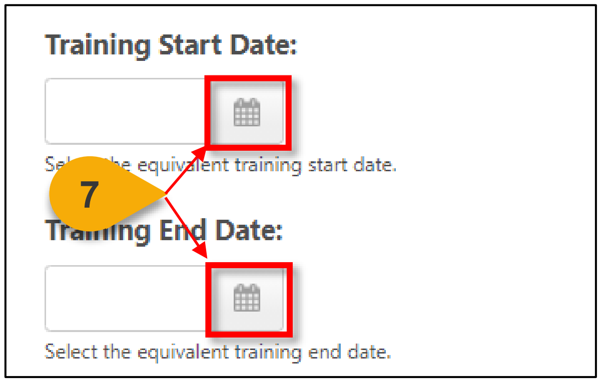


Step 6: If the course you are trying to request an equivalency for is not available in the dropdown, choose Other and enter the course code in the field labeled **If You Selected "Other", Please List**. **Note**: You must use the format ABC 123 (FED) or your request will not be approved.

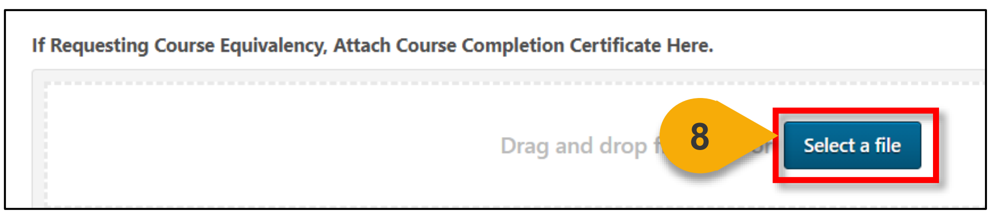


Submit an Equivalency/Fulfillment Form (Cont. 2)

Step 7: Click the **calendar icons** to enter the Training Start and End dates.



Step 8: Click **Select File** to add any supporting documentation in the attachment sections. You can add multiple attachments to any section.



Steps 9 & 10: Enter any supporting comments in the **Employee Remarks field**. Click **Submit for Approval** to route to your Agency Equivalency and Fulfillment Approvers. Please note: The timeframe for approving requests varies by Agency.

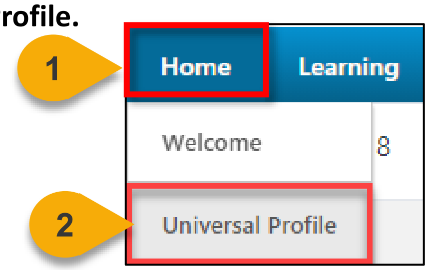
After final approval, the course will appear on your Transcript, marked as "Exempt", within 14 days.

To view your submitted requests and to check your form status, please view the View Submitted Forms and View Form Status Task Aids.

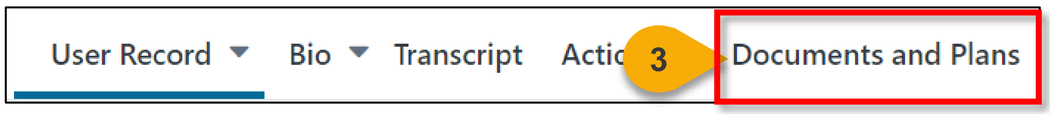
View Submitted Forms

When you want to see the forms you've submitted…

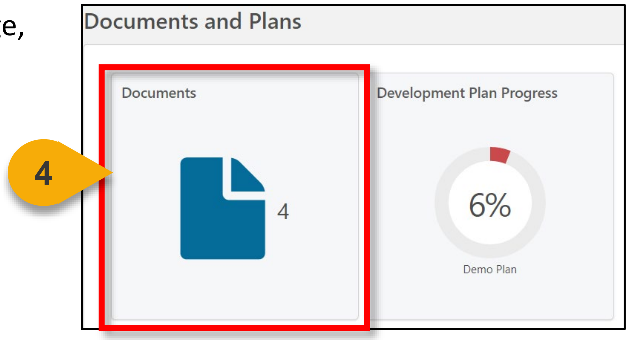
Steps 1 & 2: Hover over **Home** and click **Universal Profile.**



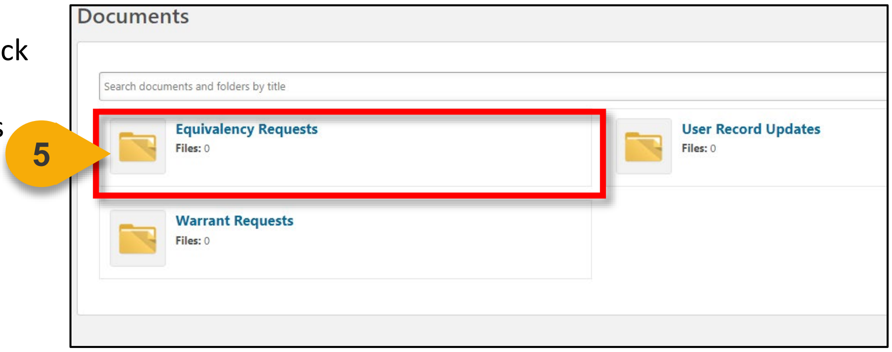
Step 3: Click **Documents and Plans**.



Step 4: On the Documents and Plans page, click **Documents.**



Step 5: On the Documents page, click the **folder** you'd like to view the contents of.



Equivalent Requests: Contains Equivalent/Fulfillment Forms you have submitted.

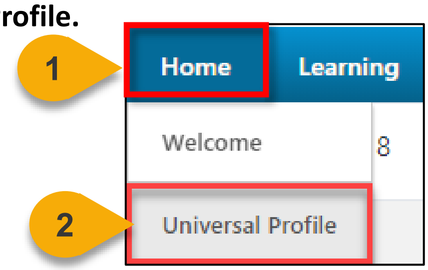
Warrant Requests: Contains Warrant Forms you have submitted.

User Record Updates: Contains User Record Update Forms you have submitted.

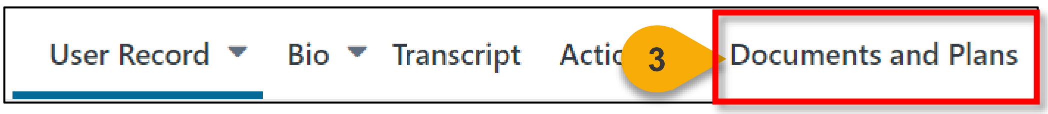
View Form Status

When you want to see the status of the forms you've submitted…

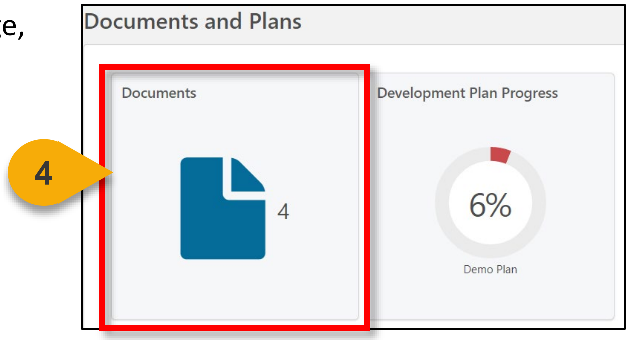
Steps 1 & 2: Hover over **Home** and click **Universal Profile.**



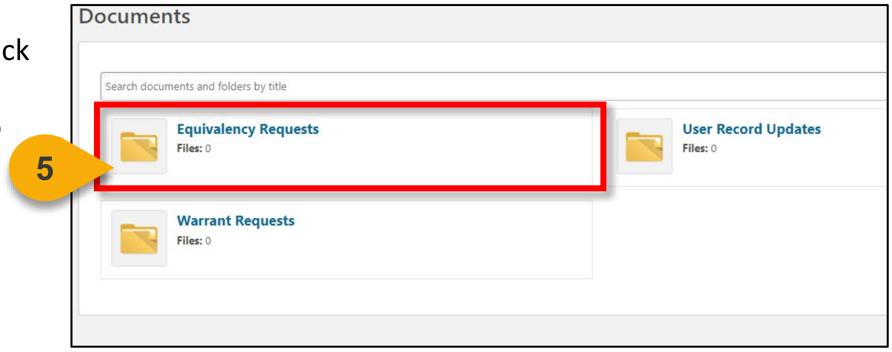
Step 3: Click **Documents and Plans**.



Step 4: On the Documents and Plans page, click **Documents.**



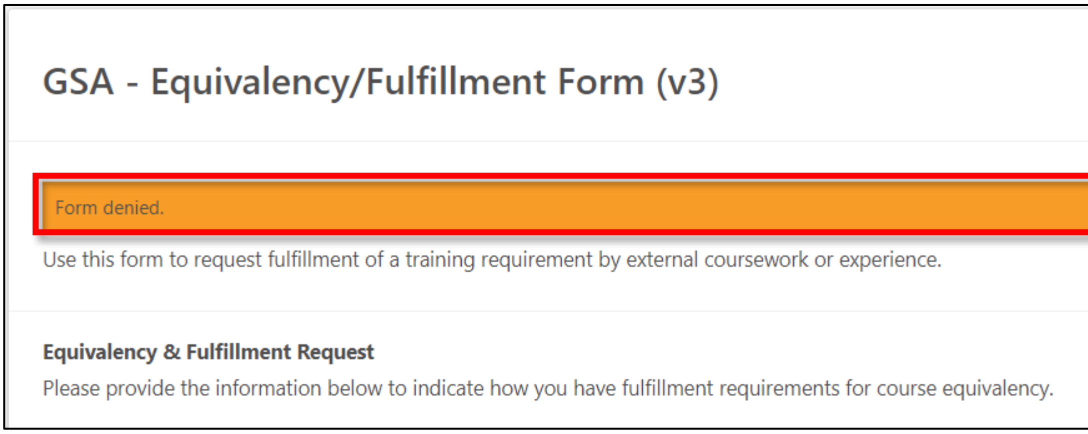
Step 5: On the Documents page, click the **folder** for the request you'd like to view.



Step 6: Click the **title** of the request you'd like to view.

View Form Status (Cont. 1)

The submitted request will open with the current status in the orange bar at the top.



Pending Approval

Your request is awaiting approval.

Approved

Your request has been approved.

Returned
Your request has been returned to you for additional information or attachments.

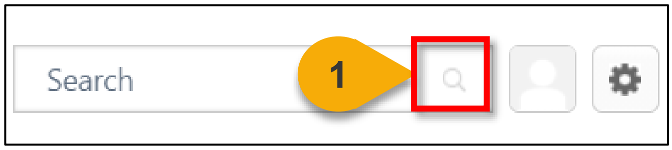
Denied
Your request was denied. A new form must be submitted if you'd like to correct the documentation.

Certifications

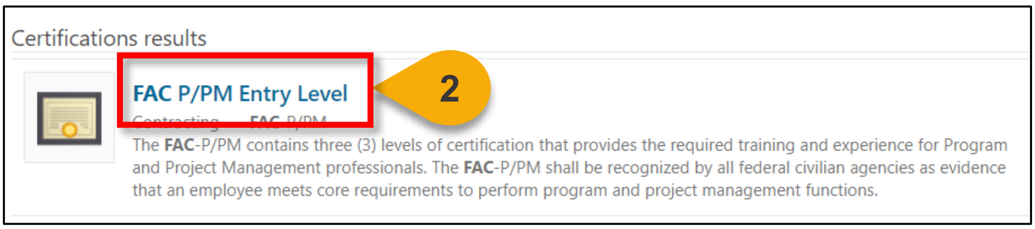
Request and Manage a Certification

When you want to request a Certification…

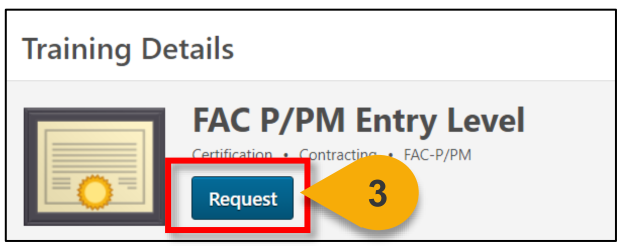
Step 1: In Global Search, **type** in the Certification you wish to request and click the **Magnifying Glass**.



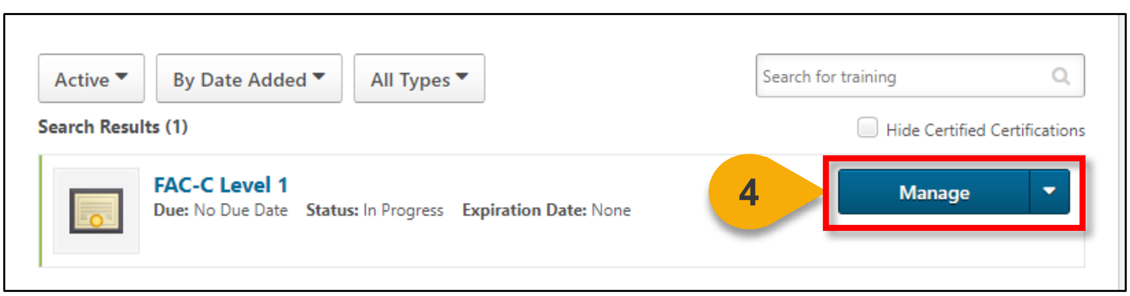
Step 2: In the results, click the **Certification Title**.



Step 3: The Training Details for this Certification will open. Click **Request**.



Step 4: You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with an “In Progress” status. Click **Manage** to view the Certification’s requirements.



Request and Manage a Certification (Cont. 1)

Certification Details Columns:
Title: The title of the Learning Object you need to complete. This could be a checklist, a training, or another Certification.
Type: The Learning Object type.
Completion: How many completions this Learning Object is worth. As a student, you can ignore this column.
Status: Your Learning Object Status (Not Activated, In Progress, Completed).
Options: Actions you can take on this Learning Object.
Credited: Whether completion of this Learning Object has been credited towards your Certification.

Step 5: Scroll down the Certification Details page to view the requirements for this certification and your progress towards meeting those requirements. You can request any items required for the Certification from this page by clicking the **Request button** in the Options column.

TITLE	TYPE	COMPLETION	STATUS	OPTIONS	CREDITED	DETAILS
Experience & Education (Required Completion: Min = 2.00, Max = 2.00 / Acquired Completion: 0.00)						
Federal Education Verification-FAI FAC-C - Lvl 1&2	Observation Checklist	1.00	Nc	Request	No	
Federal Experience Verification - FAI FAC-C Lvl 1	Observation Checklist	1.00	Not Activated	Request	No	
Required Training (Required Completion: Min = 12.00, Max = 12.00 / Acquired Completion: 1.00)						
Con 091 (FED): Contract Fundamentals	Event	0.00	Not Activated	Request	No	
CON 121 Contract Planning	Curriculum	1.00	Not Activated	Request	No	
CON 124 Contract Execution	Curriculum	1.00	Not Activated	Request	No	

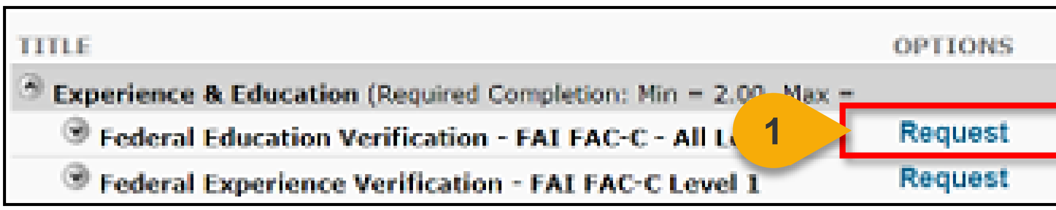
Did you complete a course that satisfies one of the certification training requirements?
You will need to submit an Equivalent/Fulfillment request for that course. A separate request is needed for each required FAI/DAU course you would like to have exempted. Please see the Task Aid: Submit an Equivalent/Fulfillment Request for more information.

Request Education/Experience Verification

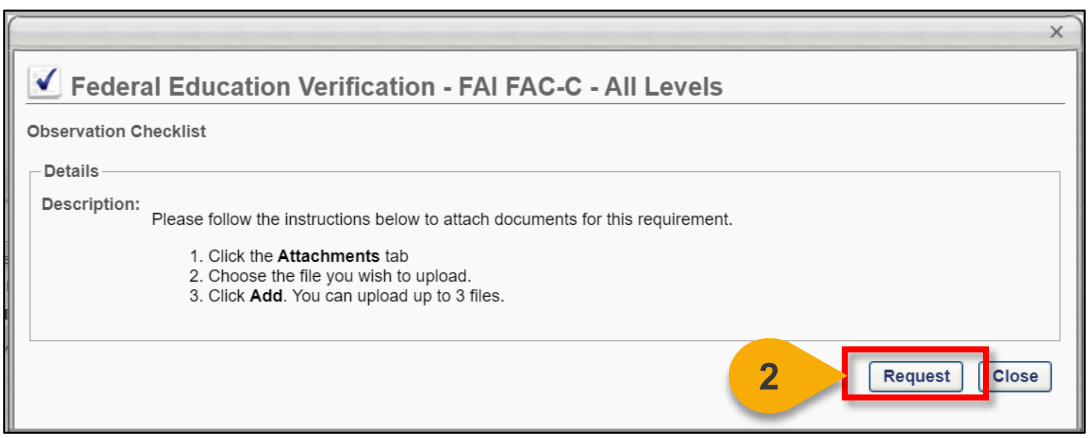
When you need to submit an Education or Experience Verification Checklist for a Certification…

Checklists are used to validate experience and education requirements for Certifications.

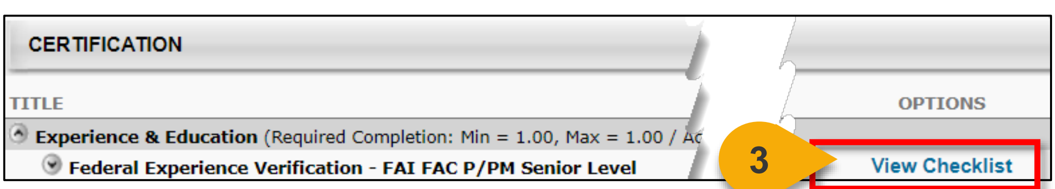
Step 1: Refer to the “Request and Manage a Certification” task aid to navigate to the Certification Details page of the Certification you would like to complete. Click **Request** in the Options column of the checklist you would like to complete.



Step 2: After you click on Request, a popup will appear, click **Request** again.

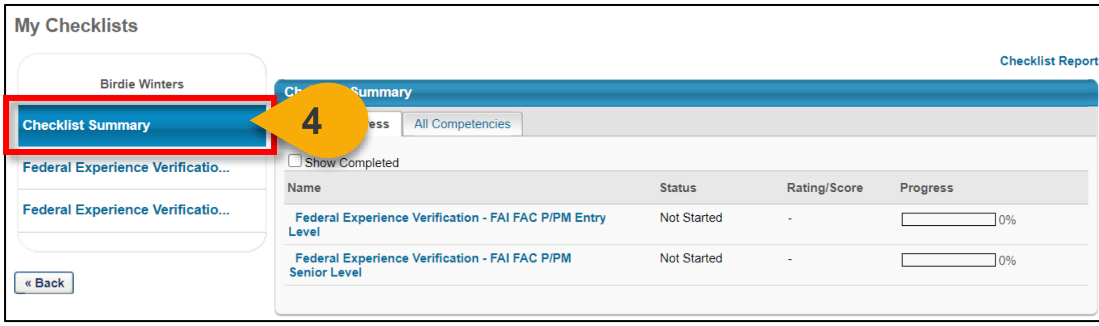


Step 3: On the Certification Details page, click **View Checklist**.



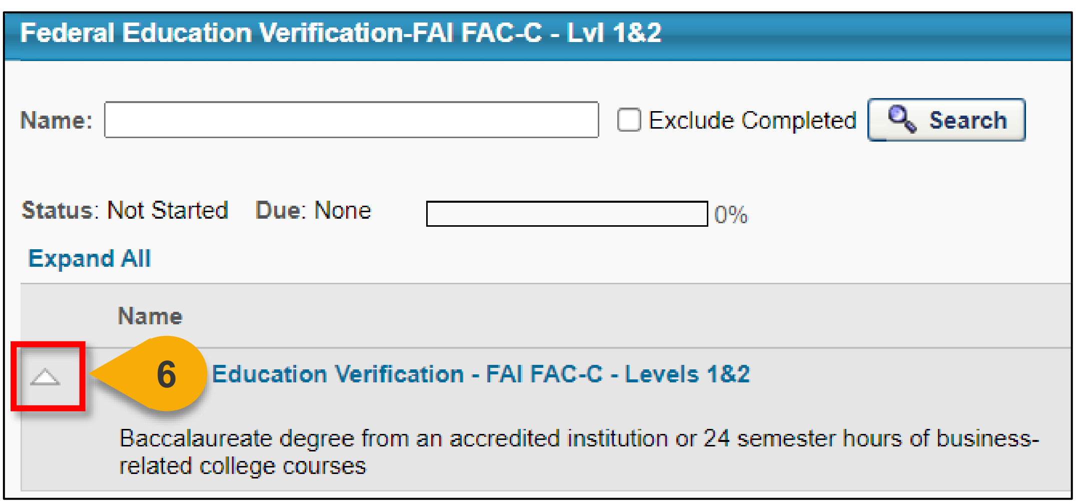
Request Education/Experience Verification (Cont. 1)

Step 4: The My Checklists page will open. Click **Checklist Summary** to view the overall progress of any checklists associated with Certifications you are enrolled in.



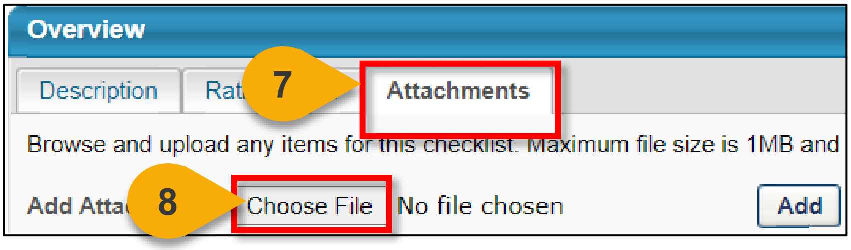
Step 5: Click the **name** of the Checklist you wish to complete**.**

Step 6: Click the **triangle** next to the checklist name to view the requirements for this checklist.

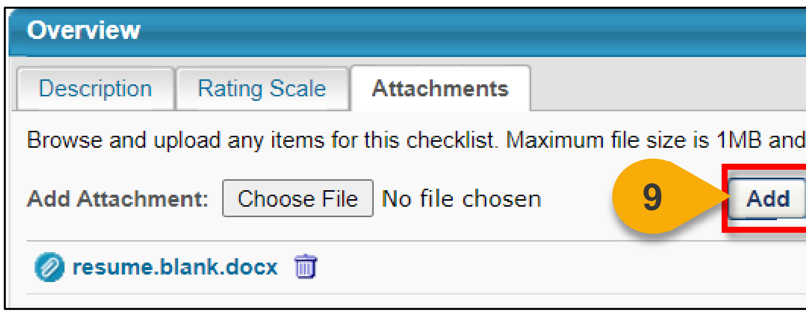


Request Education/Experience Verification (Cont. 2)

Steps 7 & 8: Click on the **Attachments** tab to upload any necessary documents for the checklist verifier to review. Then click **Choose File** to add a copy of your resume or other relevant documents.



Step 9 : After you select the file, click **Add** to add the file to your Checklist. You may add up to 3 files.



Step 10: Once all the desired attachments have been added (up to 3), click **Save**. The Checklist will be routed for approval. **NOTE:** Your status will not update on your Certification Details until the checklist is validated.

NOTE: Check with your Agency ACM to ensure that you are providing the correct documents to verify your experience.

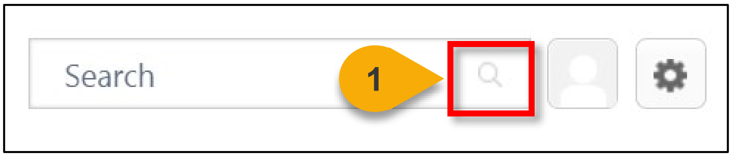
Need to attach more than 3 documents?
Upload multiple documents as one file, then upload that file as an attachment in the experience section.

Warrants

Submit a Warrant Application Form

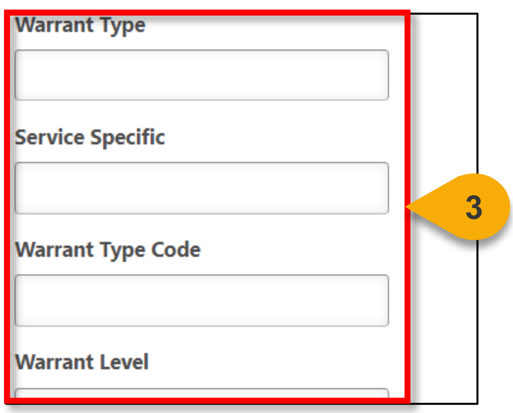
When you need to submit an application for a Warrant

Step 1: You will be notified by your Agency when the application form is available for you. Use Global Search to **search** for the keyword "Warrant Application". Click the **Magnifying Glass** to search.

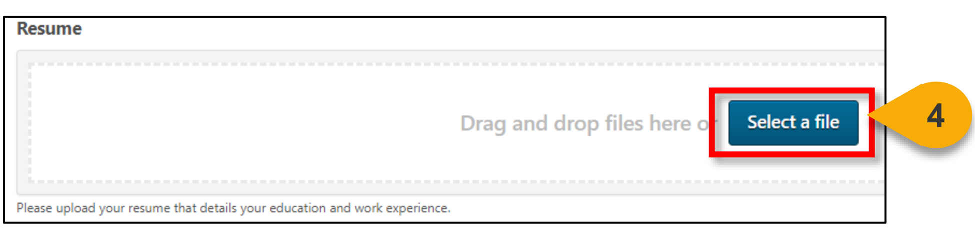


Step 2: Click on the **Warrant Application form title** to open the form.

Step 3: Complete all fields as instructed by your Agency. The fields on this form will vary by Agency.

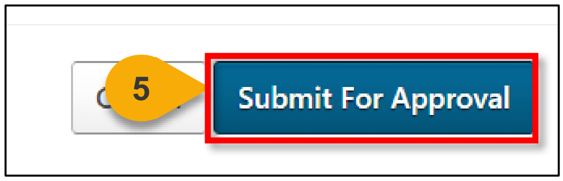


Step 4: In the attachment section, attach all files necessary for your application. You can attach multiple files per section. The attachment fields will vary by Agency. Click **Select a File** and choose the file you wish to attach.



Submit a Warrant Application Form (Cont. 1)

Step 5: When your form is complete, click **Submit for Approval**. The form will then be routed through your Agency's approval workflow. If your application is inaccurate or missing any information, it will be returned to you to revise. Refer to the "View Submitted Forms" task aid to see the status of your form at any time.



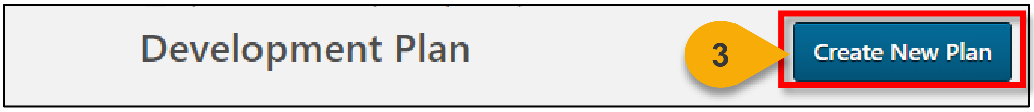
Individual Development Plans

Create an IDP

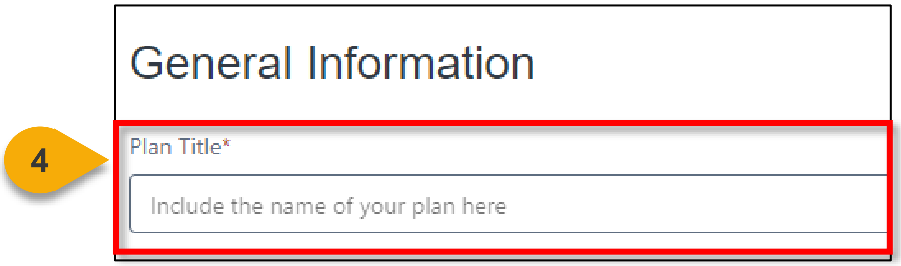
When you want to create an IDP…

Steps 1 & 2: Hover over **Performance** and click on **Development Plans.**

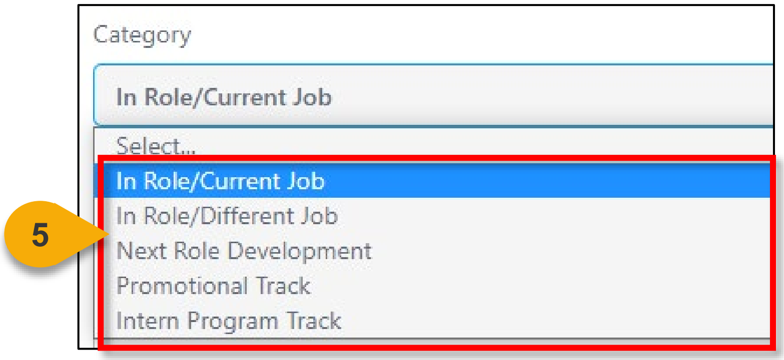
Step 3: Click on the **Create New Plan button.**



Step 4: Add a **Plan Title**.

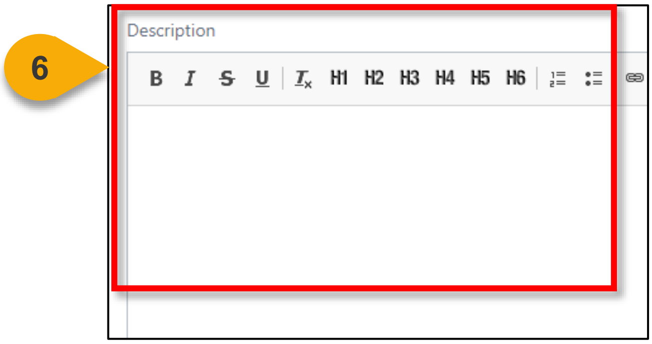


Step 5: Select the Category for this IDP from the **Category** dropdown.



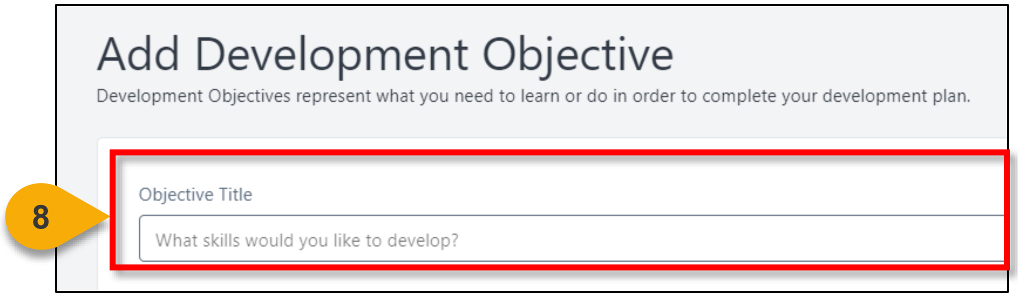
Create an IDP (Cont. 1)

Step 6: Add a description for this IDP in the **Description field**.



Step 7: In the Development Objectives section, click **Add Objective**.

Step 8: Enter an **Objective Title**.



Create an IDP (Cont. 2)

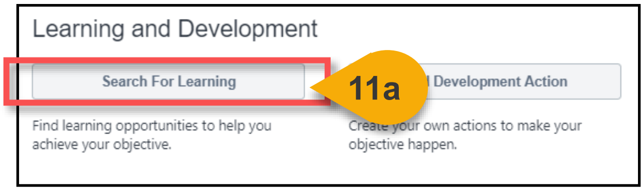
Step 9: Select a category from the **Category** dropdown.

Step 10: Add **Development Actions**. Under Learning and Development there are three options you can utilize to add training/development actions to your Objective: **Search for Learning** and **Add Development Action**.

Search for Learning:
Encompasses training sessions provided. It allows you to select online sessions.

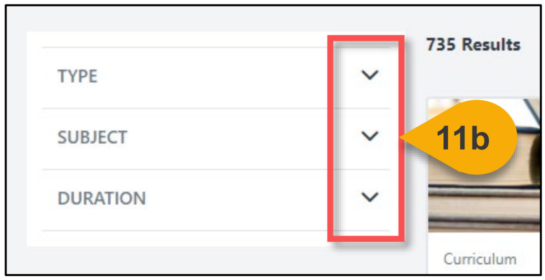
Add Development Action:
Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

Step 11a: To add training courses available online in Cornerstone, click on **Search For Learning**.



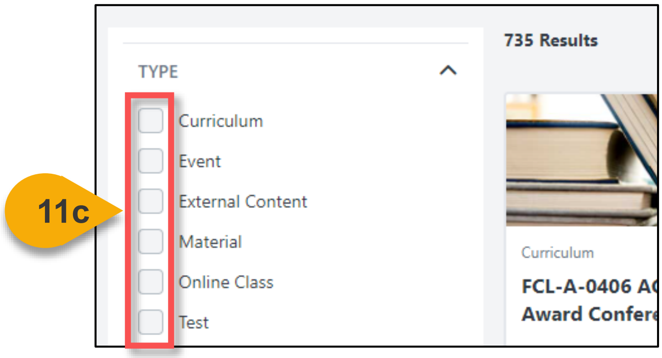
Create an IDP (Cont. 2)

Step 11b: All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows** next to the filter options to the left of the page.

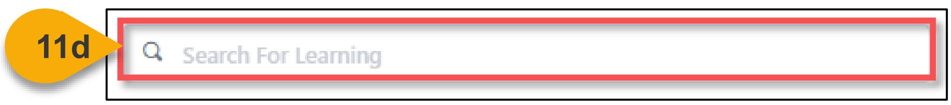


Step 11c: The filter options will expand on the screen. Select the filter you wish to apply by clicking on the **checkboxes** next to each option.

The results will be updated on the screen based on the filters you select.

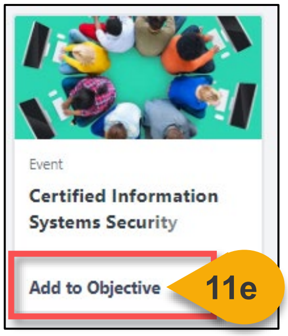


Step 11d: You may also search for a specific training course using the **Search bar**.

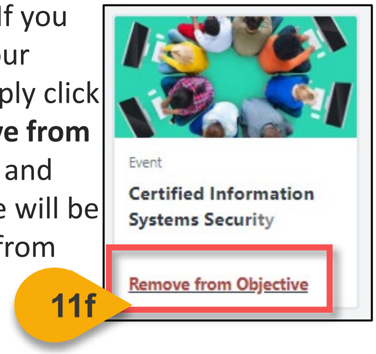


Create an IDP (Cont. 3)

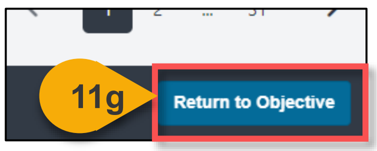
Step 11e: Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.



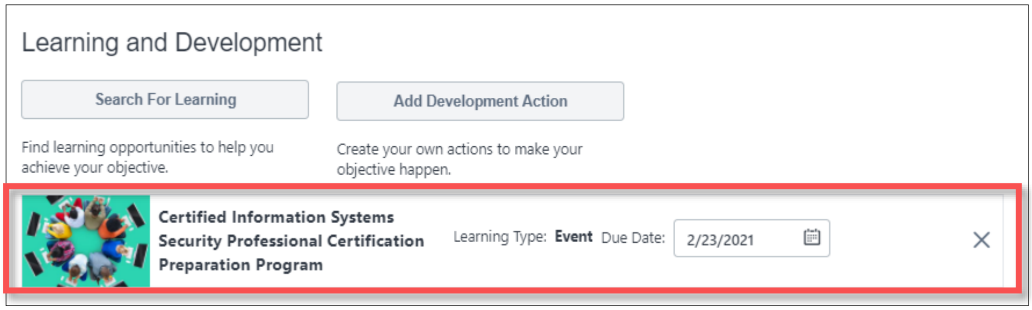
Step 11f: If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



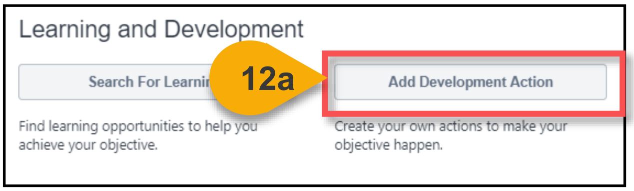
Step 11g: Once you are done selecting the training courses to be added to your Objective, click **Return to Objective** at the bottom of the page.



The course(s) selected will appear on the main Objective screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X icon** next to it.



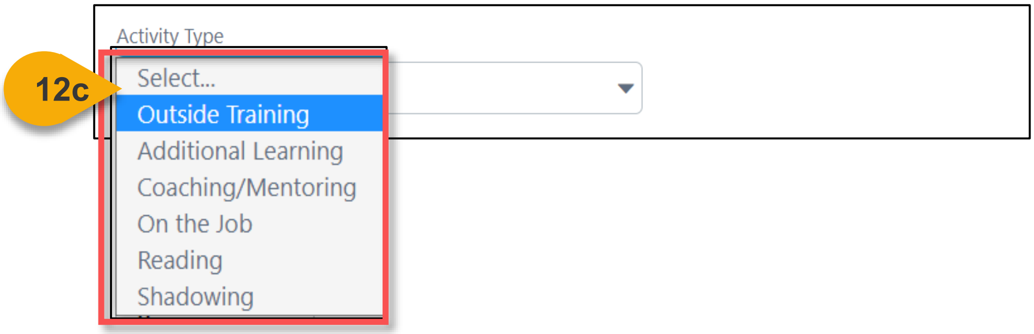
Step 12a: To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.



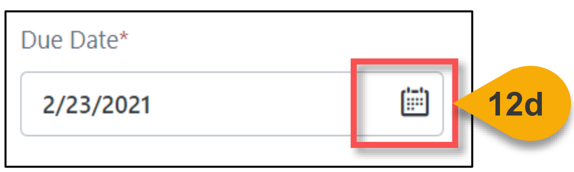
Create an IDP (Cont. 4)

Step 12b: A pop-up window will appear on the screen. You must add a description to your development action in the **Description field**.

Step 12c: Select the **activity type** from the Activity Type dropdown menu.



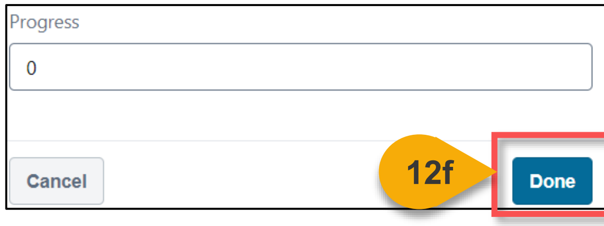
Step 12d: Confirm the due date for the development item. By default, the due date is set up to be due 6 months from when you first create this item. To change the due date, click on the **calendar icon** in the Due Date field, or simply type in the date.



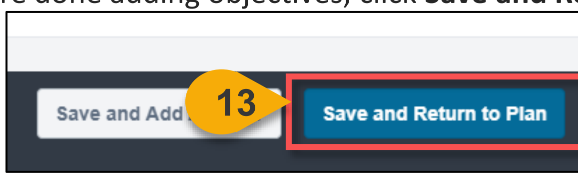
Step 12e: Update the progress you have made as applicable in the **Progress field**. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".

Create an IDP (Cont. 5)

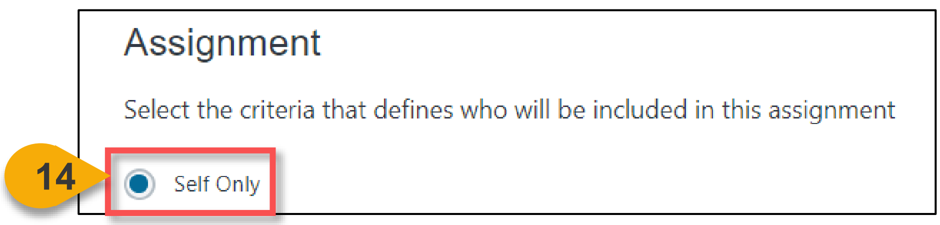
Step 12f: Click **Done** to add the activity to your IDP.



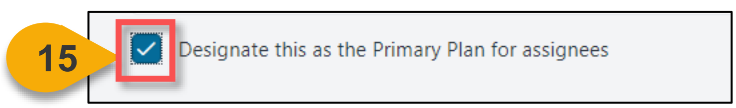
Step 13: When you are done adding objectives, click **Save and Return to Plan**.



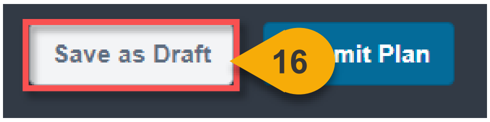
Step 14: Under Assignment, select **Self Only** to assign this IDP to yourself. If you are a Supervisor, you can assign this IDP to your employees. To assign IDPs to employees, view the "Manager" task aids.



Step 15: To assign this IDP as your primary IDP (you can have multiple IDPs), check the box next to **Designate this as the Primary Plan for assignees**.



Step 16: To save the plan as a draft and return to it later, click **Save as Draft**.

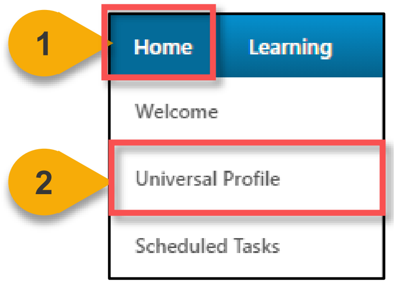


Step 17: To submit the plan for Manager approval, click **Submit Plan**.

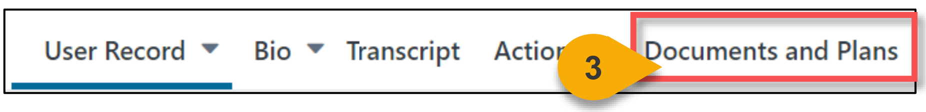
Update an IDP

When you want to update an IDP Objective, Training or Action Step…

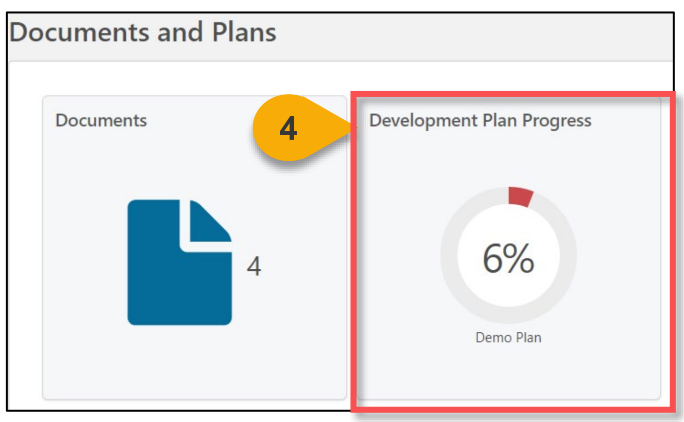
Steps 1 & 2: Hover over **Home** then navigate to **Universal Profile**.



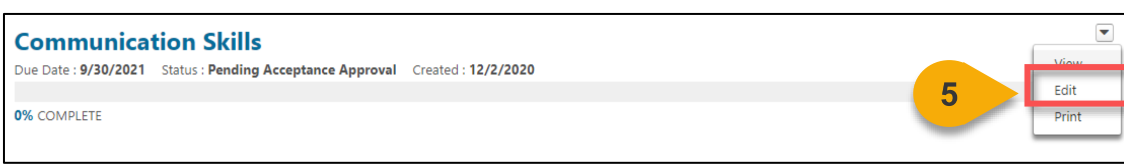
Step 3: Click on the **Documents and Plans** tab.



Step 4: Click on the **Development Plan Progress widget**.

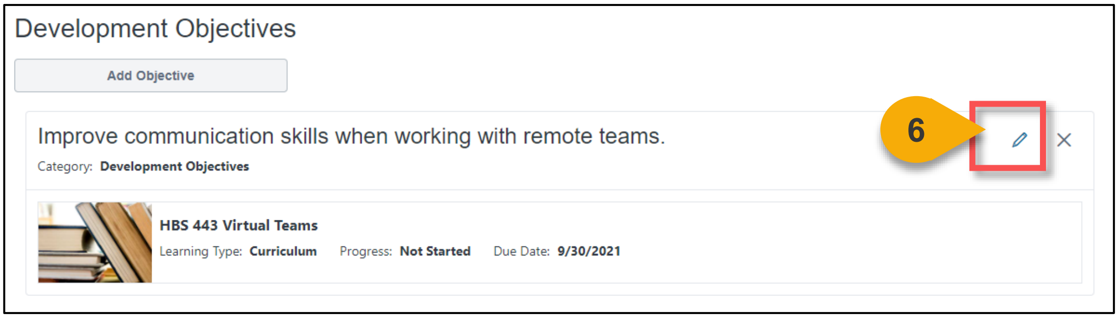


Step 5: Select the dropdown icon **Edit option** next to the IDP to which you want to add a new Objective.

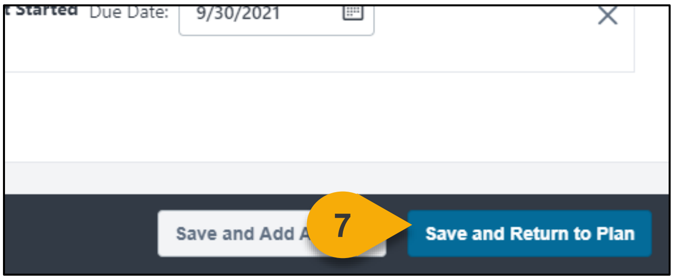


Update an IDP (Cont. 1)

Step 6: Click the **Edit icon** in the Development Objectives section to edit an objective.



Step 7: When you've completed your edits, click **Save and Return to Plan**.

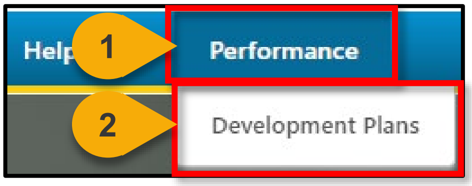


Step 8: Click on the **Submit Plan button** when you are ready to resubmit your plan for approval.

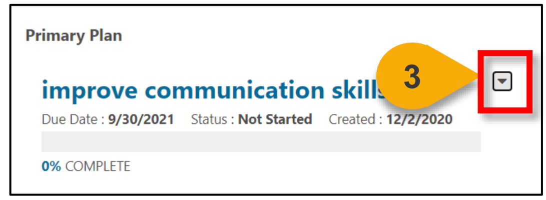
Cancel an IDP

When you want to cancel an IDP…

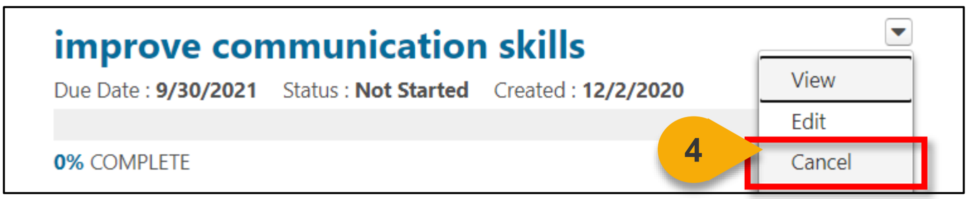
Steps 1 & 2: Hover over the **Performance tab** and then click **Development Plans**.



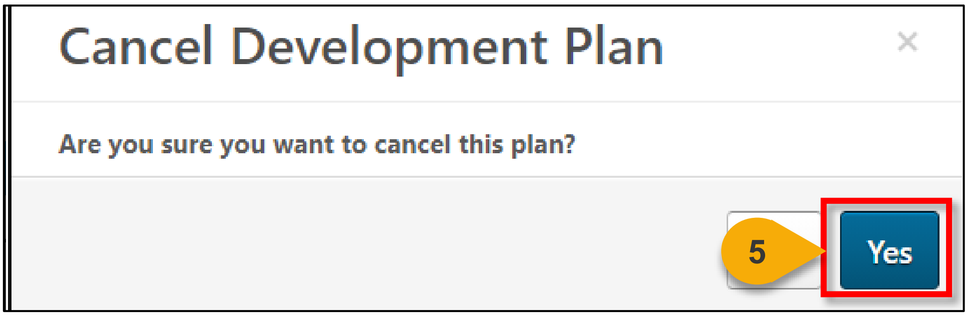
Step 3: Click the **dropdown arrow** next to the plan you would like to cancel.



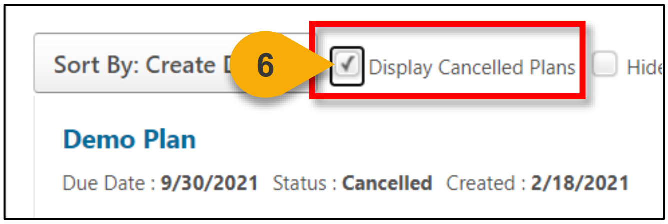
Step 4: Select **Cancel** from the dropdown menu. **Note:** You can only cancel approved plans.



Step 5: A popup will appear. Select **Yes** to cancel the IDP.



Step 6: The plan will be cancelled. Should you wish, you can view this plan by selecting **Display Cancelled Plans** on your Development Plan page.



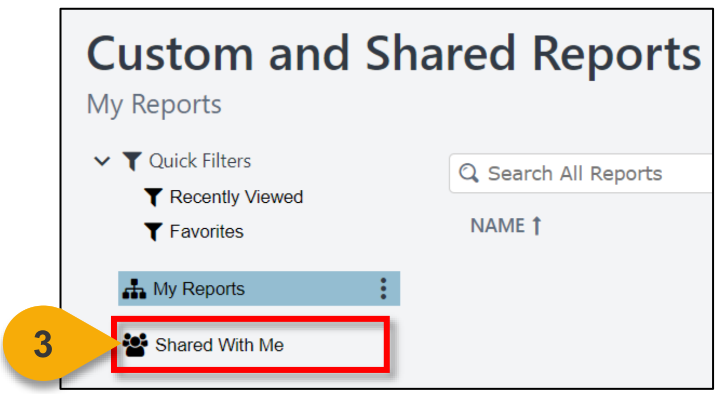
Reports

View and Download Custom Reports

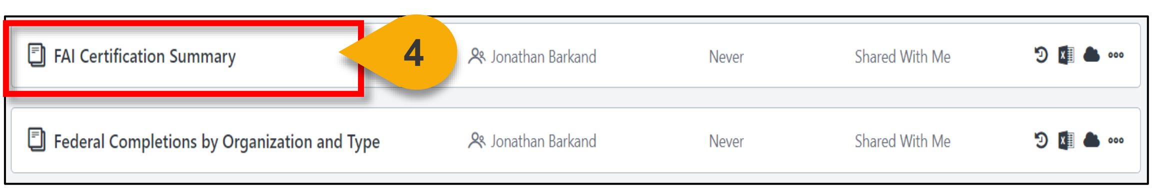
When you want to filter and download a report…

Steps 1 & 2: Navigate to the **Reports tab** and then select **Custom and Shared Reports.**

Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you. If no reports populate, no reports have been shared with you.

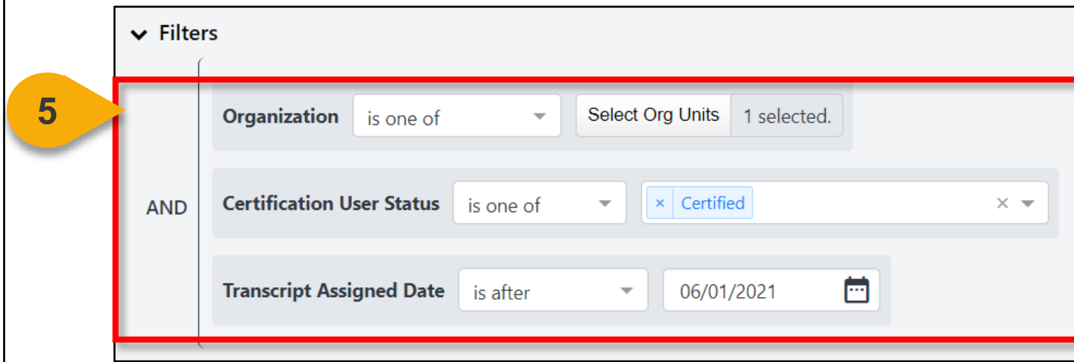


Step 4: Click the **Report Name** you want to view to update the report filters.

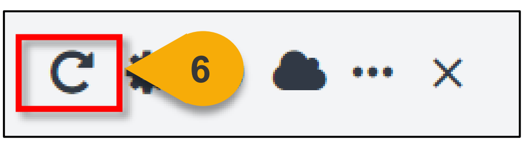


View and Download Custom Reports (Cont. 1)

Step 5: Update the **filters** as needed. The filters will vary based on the report.

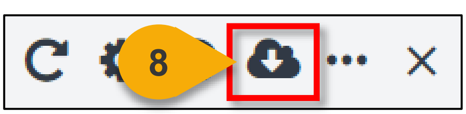


Step 6: Click **Refresh this report** icon in the top right corner to see a sample of the newly-filtered report on the bottom portion of the page.



Step 7: Click the **Schedule for now** icon in the top right corner to get a downloadable version of the report right away.

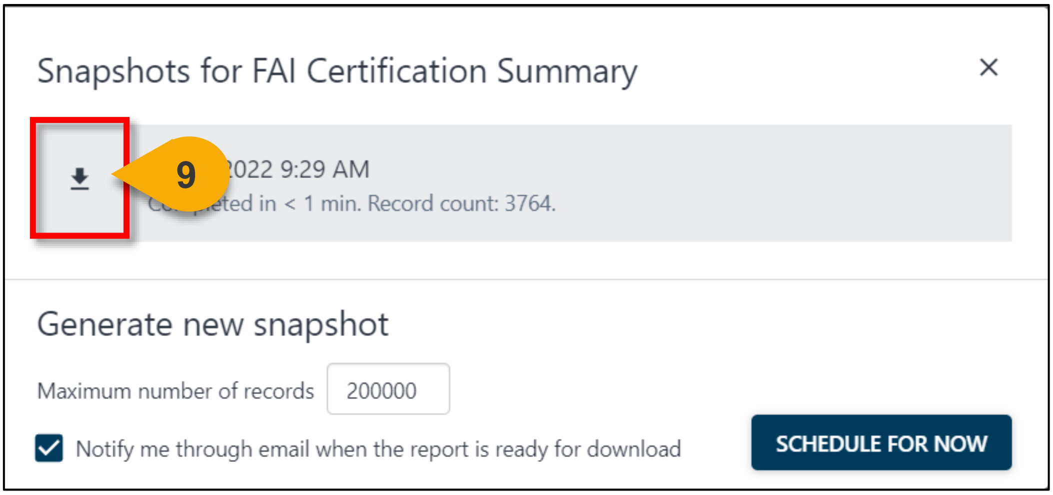
Step 8: Click the **Download the report** icon in the top right corner to get a downloadable version of the report right away.



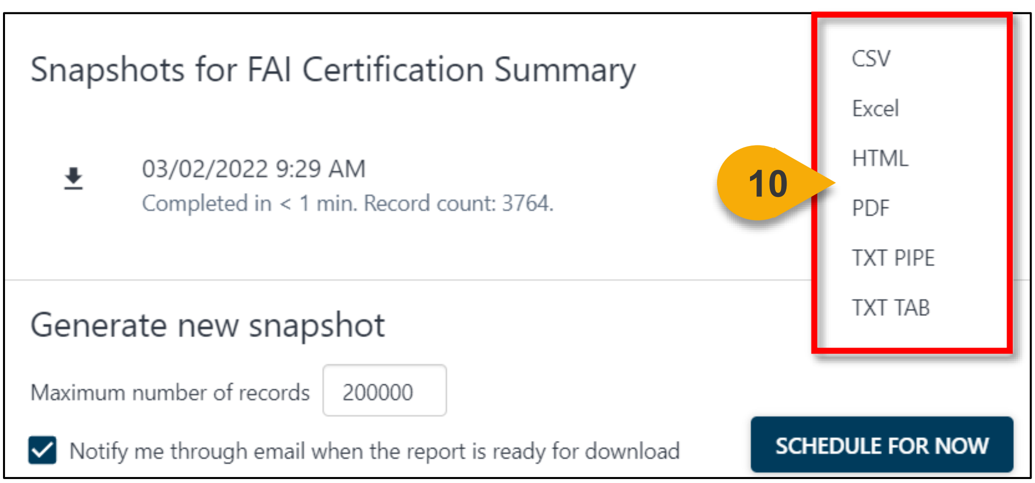
FAI

View and Download Custom Reports (Cont. 2)

Step 9: Click on the file download.



Step 10: Choose the **File Format** in which you would like to download the report. The report will download to your computer.



Help

Help

Support Area	Support Provided	Contact
Defense Acquisition University (DAU) Help Desk	• FAI CSOD System Questions and Issues • FAI CSOD System Errors and Troubleshooting • Password Issues and Resets	Commercial: 703-805-3459; Option 1 Toll Free: 1-866-568-6924, Option 1 DSN: 655-3459; Option 1 https://services.dau.edu/psp?id=public_portal
Your Agency's Acquisition Career Manager (ACM)	• Agency-specific Acquisition Training, Certification, and Continuous Learning (CL) Requirements • Agency-specific Acquisition Policies and Procedures • Career Development • Training and Development Opportunities	https://www.fai.gov/humancapital/acm
FAI CSOD Training Materials and Online Resources	• Task Aids for FAI CSOD Roles • FAI CSOD Training Videos • Other Guidance for Performing Tasks in FAI CSOD	https://dau.csod.com/catalog/CustomPage.aspx?id=221000509
FAI Website FAQs	• FAI CSOD Migration • Acquisition Training • Federal Acquisition Certifications (FAC-C, FAC-COR, FAC-P/PM) • More!	https://www.fai.gov/page/fai-cornerstone-ondemand-csod-faqs#latestInfo

When to Use Equivalent/Fulfillment vs. External CL Activity Requests

Submit an *Equivalent/Fulfillment Request* when training:

- was completed external to FAI CSOD (i.e., you completed it directly with a commercial training provider)
- is equivalent to training that exists in the FAI CSOD training catalog

Submitting an *Equivalent/Fulfillment Request* is essential if the training satisfies a prerequisite or certification requirement.

However, *Equivalent/Fulfillment Requests* do not confer Continuous Learning Points (CLPs) and will not appear on your CLIP Dashboard. Therefore, you *also* need to submit an *External Continuous Learning Activity Request* for that training to earn CLPs.

You can and should submit an *External Continuous Learning Activity Request* for training or learning activities that are not equivalent to what exists in the FAI CSOD training catalog. Examples include: completing college/university courses, attending a training conference, etc.

Addendum

DHS

For DHS-specific guidance regarding User records, training, certification and specialization requirements and routing, continuous learning, and warrants, please refer to:
https://urldefense.com/v3/__http://dhsconnect.dhs.gov/org/comp/mgmt/ocpo/TrainingCareerDev/Pages/OAW-Main.aspx__;!!May37g!czI1g9fhw1QwnkSksSkpwhE285UIDDRNiMCXT0UaurKc2mQE1Py8WHTVvrI7uzk$.

Please note, you must be logged onto the DHS network to access this link.

DOI

DOI Employees - Prior to contacting the DOI ACM as referenced in the "Addition Resources" section, first contact your BUREAU ACQUISITION CAREER COORDINATOR (BACC).

BACC contact information, along with DOI-specific guidance related to FAC certifications, can be found here: DOI Acquisition Toolkit: Bureau Acquisition Career Coordinator: https://doimspp.sharepoint.com/sites/DOIToolKit/SitePages/DOI-Acquisition-ToolKit.aspx

EPA Continuous Learning (CL) Guidance

Guidance for CLPs

The Office of Management and Budget, Office of Federal Procurement Policy (OMB OFPP)/ Federal Acquisition Institute (FAI) Continuous Learning Guidance, Continuous Professional Learning, supersedes the EPA Guidance On Meeting Requirements For Continuous Learning Points (CLPs) dated June 7, 2021.

Continuous learning activities enhance the skills of acquisition professionals, affords opportunities for professional growth, and can improve the quality of services rendered. Federal Acquisition Certification (FAC) certified workforce members are required to earn Continuous Learning Points (CLPs) every two years to maintain their certification.

The agency Acquisition Career Manager (ACM) and supervisors shall work with acquisition workforce members to identify opportunities and determine the appropriate number of Continuous Learning Points (CLPs) obtained from each learning activity. Accounting for and documenting continuous learning activities is a mutual responsibility between the acquisition workforce member, supervisor and ACM.

Supporting Documentation

Supporting documentation must be submitted with all external training courses and events/activities CL requests (For example, training course certificate of completion, training agenda, redacted SF 50 with no personally identifiable information **(PII),** article publication - table of content with article title and author's name or a memorandum signed by supervisor that attest and certify training/events /activities for requested CLPs - the memorandum can be electronically signed).

Express Classes (Administrative Role for ACM Only)

•All continuous learning (CL) external training, activities, and events not registered and completed in FAI CSOD with five or more participants, must be submitted to the ACM as an Express Class to avoid the need of inputting these training types as individual external training requests for CLPs.

•The Express Class feature in the CL module allows the ACM to create a specific course and upload a Microsoft Excel file with the participants email addresses, course date, start and end time, and CL points credited as a batch upload for such things as conferences, all as **EPA annual mandatory training**, conferences, all hands meeting, technical evaluation panel (TEP), brown bags training, etc. Therefore**, DO NOT ENTER** these CL activities as individual external training requests for CLPs.

•This Microsoft Excel file with the participants' email addresses, course date, start and end time, and CL points credited must be provided to the ACM by host/facilitator of the training, activities, or events.

•There are no CLP certificates issued for completion of an Express Class. These training, activities, and events will appear in the transcript as "Completed."

EPA (Cont. 1)

The following activities can generally be used to obtain CLPs:

•**Training/Education:** CLPs may be earned through formal or informal training activities that are related to the acquisition workforce member's job, including participating in self-directed study, presenting training, and taking higher education coursework.

•**Participating in Professional Organizations and/or their Events:** CLPs may be earned for participating in professional organizations, attending events sponsored by them, and obtaining professional licenses or certifications. Membership in a professional organization alone will not be considered as fulfilling continuous learning requirements, however, participation in organizational leadership will be considered.

- Self-directed study programs must be approved by the employee's supervisor.
- Before participating in professional organizations, workforce members must ensure that their participation is authorized by their agency and is permitted by ethics laws and regulations. Examples of activities that may qualify for CLPs include holding elected/appointed positions, such as committee leadership roles, or attending and/or presenting at educational conferences or meetings.

•**Publishing:** Publishing articles related to acquisition are generally acceptable for CLPs. Points will only be awarded in the year published. Authors must comply with agency publication policy.

•**Participating in Experiential Activities:** Experiential activities are those at-work experiences that serve to enhance workforce professional skills and improve agency acquisition delivery, such as rotational and developmental assignments or mentoring.

- CLPs accumulate for learning; simply performing an already understood work function **SHOULD NOT** be used to accumulate CLPs.
- Longer experiences assignments can be more beneficial than shorter experiences, but the granting of CLPs should be focused on what the workforce member has learned, rather than what they have done.
- Supervisors and workforce members should pre-define, as much as possible, the learning activities to be accomplished in each experience assignment and should work together to determine the appropriate number of CLPs that each experience will accumulate for the member.
- Mentoring of workforce members during experiential learning is encouraged, as is sharing of knowledge gained in an experiential assignment through reports, briefings, project designs or formal or informal training.
- Workforce members and supervisors should work together to identify qualifying experiences and their resulting CLP values. They should also seek and consider the ACM advice in the assignment of CLP values for activities not listed in the OMB OFPP/ FAI CL Guidance Listing.

EPA (Cont. 2)

Additional Training, Events, and Activities for CLPs

The following CLPs are NOT listed in the OMB, OFPP/FAI CL guidance:

Activity	Points
EPA Formal or Informal Training Course (Classroom, Webinar, or Online) (**Also applicable to presentation of pilot courses**)	1 CLP per hour of instruction
Training Development (**For course developers of assigned training course**)	2 CLPs per hour for each hour of course instruction during delivery
External Vendor Procured Training (**Training not required for FAC-C, FAC-COR, or FAC-P/PM certification**)	CLPs as stated on the Certificate of Completion
Professional Development Unit (PDU)	1 CLP per PDU
Continuing Professional Education (CPE)	1 CLP per CPE
Volunteers for Contract Management Assessment (CMAT) Program Reviews (**Does not apply to the Program Manager**)	1 CLP per hour of activity; maximum 40 CLPs per cycle
Purchase Card Transaction Reviews as part of the Contract Management Assessment CMAT Program Reviews (**Does not apply to the Program Manager**)	1 CLP per hour of activity; maximum 40 CLPs per cycle
Webinars /All-Hands Meeting/Brown Bag Training Session	Includes Q&A - 1 CLP per hour; maximum of 20 CLPs per year
EPA Annual Required (Mandatory) Training	1 CLP each course per year
On-Site Coordinators (OSC) Warrant Training Course (**1-time credit only upon completion during current cycle**)	40 CLPs
OSC Continuous Learning Course presented by OAS, HQAD	Up to 40 CLPs depending on course length (**As advertised in training announcement**)
Special Workgroups - (e.g. EAS, ELMS Project Initiatives; Remedial Acquisition Framework (RAF); SME for FAC- P/PM Policy Development (**Only if not part of assigned position requirements**)	Includes Q&A - 1 CLP per hour; maximum of 20 CLPs per year
Technical Evaluation Panel (TEP)	1 CLP per hour of activity; maximum 20 CLPs per cycle (Need documentation with panel members name, contract number and CO name, for example: email with panel members names or memorandum for CO.)
Integrated Project Team (IPT)	1 CLP per hour of activity (Need documentation project name and project or program manager name); maximum 20 CLPs per cycle

Treasury

Treasury Employees – In lieu of contracting the Treasury ACM as references in the "Help" section, please contact your BUREAU ACQUISITION CAREER MANAGER (BACM). Treasury BACMs will escalate issues to the Treasury ACM, as needed.

For Treasury-specific guidance regarding user records, training, FAC certifications, warrants, specialization requirements, routing, and continuous learning, please contact your BACM directly.

Treasury BCM contact information, along with Treasury-specific guidance can be found here:

https://my.treas.gov/Collab/OPE/Acquisition%20Workforce/Pages/Career%20Management_Home.aspx