



# Equivalent/ Fulfillment Course Approvers Task Aids

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



<https://www.fai.gov/>

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# Introduction

# Equivalent/Fulfillment Process

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## **Part 1: Form Submission**

1. User searches for the equivalent/fulfillment form for their Agency
2. User completes the form and submits for approval

## **Part 2: Form Approval**

1. Equivalent/Fulfillment Course Approver receives notification of request for action
2. Approver approves, denies, or denies and returns the forms
3. If approved, User's form status updates to "Approved"

## **Part 3: Course Credit Provided**

1. On a regular basis, FAI Admin will run a report that identifies Users whose forms have been approved
2. FAI Admin will mark the User as "Exempt" for the approved course
3. Users can expect to see this on their transcript within 14 days of final approval

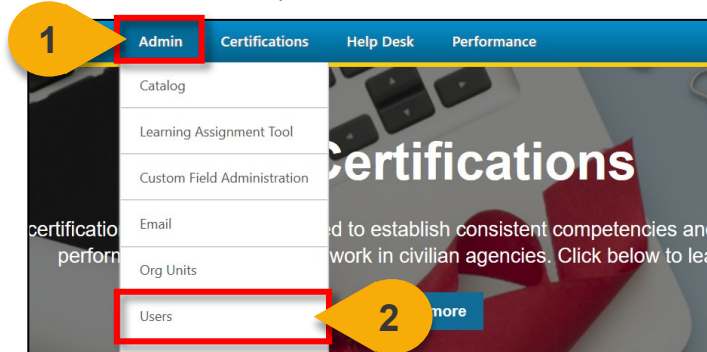


# User Information

# Search for a User

*When you want to look up a User...*

**Steps 1 & 2:** Hover over the **Admin** tab, then click **Users**.



**Step 3:** Enter User information into the **search fields**.


A screenshot of the 'Users' search form. The form contains several input fields: 'Last Name', 'City', 'Manager' (with a pop-out icon), 'First Name', 'State', 'Approver' (with a pop-out icon), 'User ID', 'Zip', 'Active' (dropdown menu), 'User Name', 'Country' (dropdown menu), and 'Email'. A red box highlights the entire search form area, and a yellow callout bubble with the number '3' points to the 'Approver' field. Below the form is a 'Select OU Criteria' dropdown menu.

**Step 4:** Click on **Select OU Criteria** to further filter your search if desired. A **dropdown menu** will appear and allow you to select the OU type. The pop-out icon will then appear and allow you to select the OU.

A screenshot of the 'Users' search form, identical to the previous one. A red box highlights the 'Select OU Criteria' dropdown menu at the bottom of the form, and a yellow callout bubble with the number '4' points to it.

# Search for a User (Cont. 1)

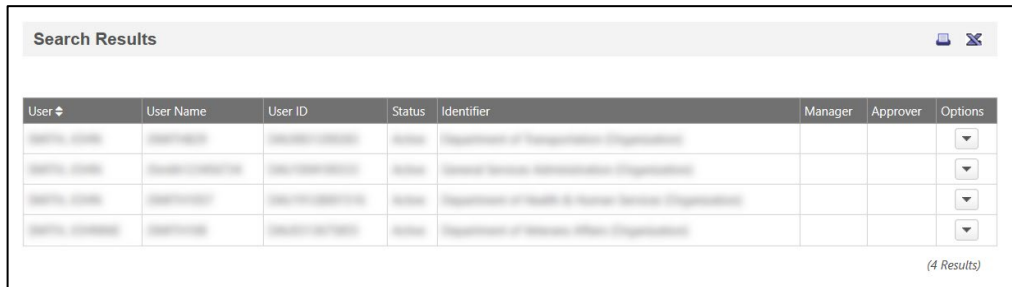
**Step 5: Hit enter or click Search.**



The screenshot shows a search interface with the following elements:

- An input field labeled "Email".
- A dropdown menu labeled "Select OU Criteria".
- A blue button with a magnifying glass icon and the text "Search".
- A red rectangular box highlights the "Search" button.
- A yellow callout bubble with the number "5" points to the "Search" button.
- A link labeled "+ Create New Group" is located at the bottom left of the form area.

The search results will populate. From here, you can view the User Record or Transcript for the User. See the “View User’s Transcript” task aid for more information on how to perform this function.



The screenshot shows a table titled "Search Results" with the following columns: User, User Name, User ID, Status, Identifier, Manager, Approver, and Options. There are four rows of data, each with a dropdown arrow in the Options column. The text "(4 Results)" is displayed at the bottom right of the table.

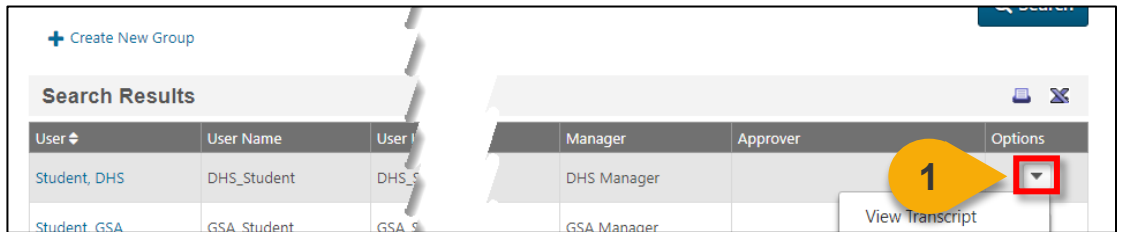
User	User Name	User ID	Status	Identifier	Manager	Approver	Options
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]			▼

(4 Results)

# View User's Transcript

*When you want to view a Transcript...*

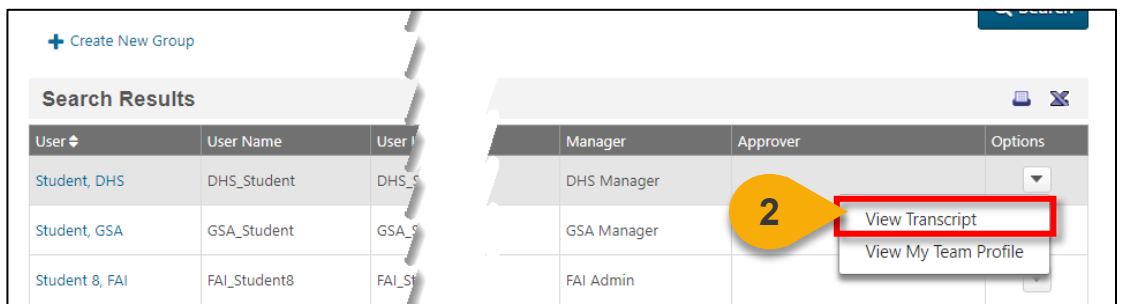
**Step 1:** Use the "Search for a User" task aid to find the User Record you wish to view. Click the **dropdown arrow** in the **Options** column.



The screenshot shows a table with search results. The 'Options' column for the first row is highlighted with a red box and a yellow callout bubble containing the number '1'. The table has columns for User, User Name, User ID, Manager, Approver, and Options.

User	User Name	User ID	Manager	Approver	Options
Student, DHS	DHS_Student	DHS_S	DHS Manager		▼
Student, GSA	GSA_Student	GSA_S	GSA Manager		

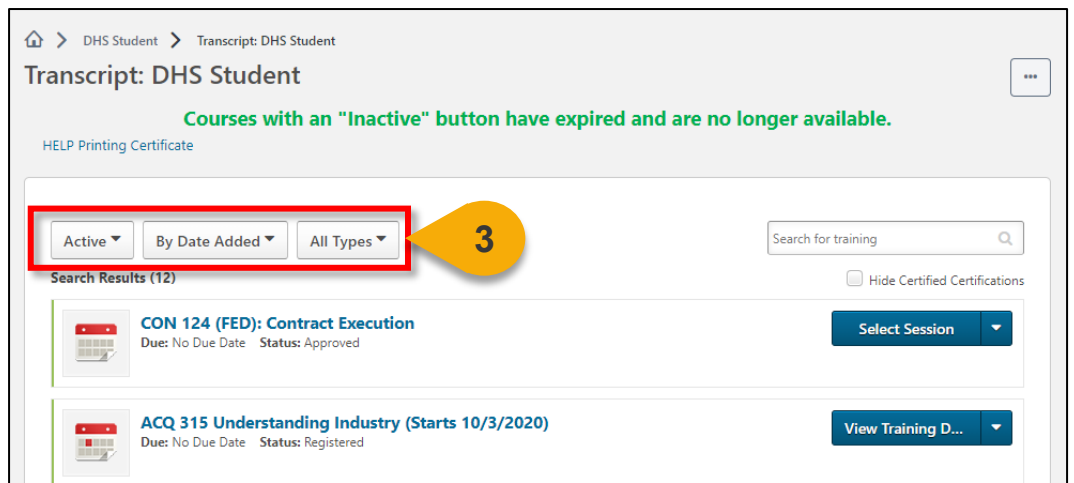
**Step 2:** In the dropdown menu, select **View Transcript**.



The screenshot shows the same table as in Step 1, but the dropdown menu for the 'Options' column is open. The 'View Transcript' option is highlighted with a red box and a yellow callout bubble containing the number '2'. The dropdown menu also includes 'View My Team Profile'.

User	User Name	User ID	Manager	Approver	Options
Student, DHS	DHS_Student	DHS_S	DHS Manager		▼
Student, GSA	GSA_Student	GSA_S	GSA Manager		
Student 8, FAI	FAI_Student8	FAI_ST	FAI Admin		

**Step 3:** You will now see the **User's Transcript**. You can use the **filters** on this page to view items with a specific status or of a specific type. You can also change how your results are ordered. The default is set to order By Date Added.



The screenshot shows the transcript page for a DHS Student. The page title is 'Transcript: DHS Student'. Below the title, there is a green message: 'Courses with an "Inactive" button have expired and are no longer available.' Below this message, there are three filter buttons: 'Active', 'By Date Added', and 'All Types'. These buttons are highlighted with a red box and a yellow callout bubble containing the number '3'. To the right of the filters is a search box labeled 'Search for training'. Below the search box, there is a checkbox labeled 'Hide Certified Certifications'. The main content area shows two course entries: 'CON 124 (FED): Contract Execution' and 'ACQ 315 Understanding Industry (Starts 10/3/2020)'. Each entry has a 'Due: No Due Date' and 'Status' field, and a button to view the course details.



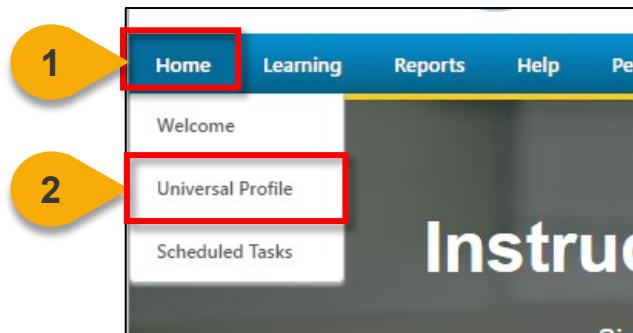


# **Equivalent/ Fulfillment Experience Approvals**

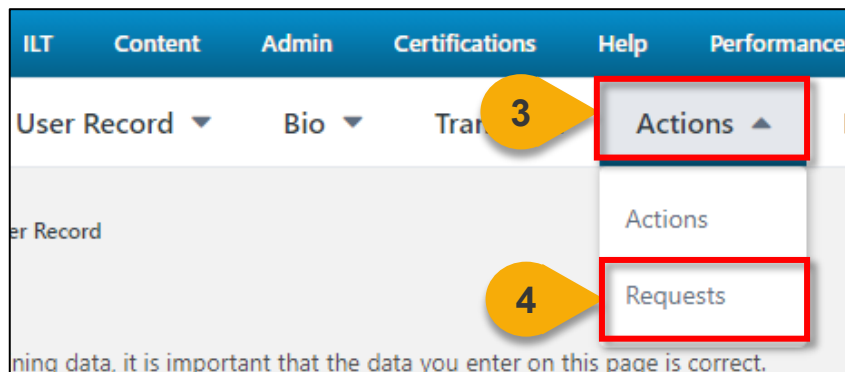
# Approve or Deny Course Equivalency/ Fulfillment Experience Request

*When you want to approve or deny a fulfillment or equivalency request...*

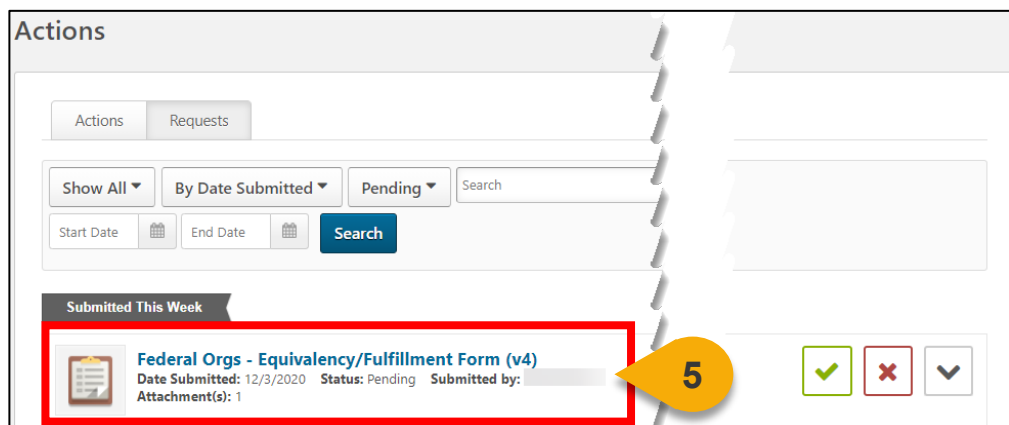
**Steps 1 & 2:** Hover over the **Home** tab, then click **Universal Profile**.



**Steps 3 & 4:** Hover over the **Actions** tab, then click **Requests**.



**Step 5:** Click the **form title** you wish to approve or deny to view details of the request.



# Approve or Deny Course Equivalency/ Fulfillment Experience Request (Cont. 1)

**Step 6:** Review the information provided by the User. Click the **attached proof of equivalency/fulfillment** to download and review the document.

The screenshot shows a form titled "Federal Orgs - Equivalency/Fulfillment Form (v4) for [redacted]". Below the title, it says "Use this form to request fulfillment of a training requirement by external coursework or experience." There are two "FCN 410" labels. A "Training End Date" field shows "10/9/2020". A red box highlights an attachment named "CourseCompletion\_Blank.docx" (39.14 KB) with a yellow callout bubble containing the number "6".

**Step 7:** Enter comments, as needed. Then, you can choose to **Approve, Deny, Deny and Return, or Cancel**. See the yellow box below for more information on each action.

The screenshot shows the bottom section of the form. It includes an "Approval Comment (optional)" text area. Below it, a yellow callout bubble with the number "7" points to a row of four buttons: "Cancel", "Deny", "Deny and Return", and "Approve". The "Approve" button is highlighted in blue.

- **Cancel:** You will be returned to your requests page and no action will be taken on this request.
- **Deny:** The form will be denied and no credit will be given for the course.
- **Deny and Return:** The form will be denied, but the User will have an opportunity to resubmit the form. The User will see your denial comments in the email notification they receive.
- **Approve:** The form will be approved and go to the next approval level. If you are the final approval level, the form will be queued for the Admin to manually update the User's Transcript.

# Submit an Equivalency/Fulfillment Form as a SAR

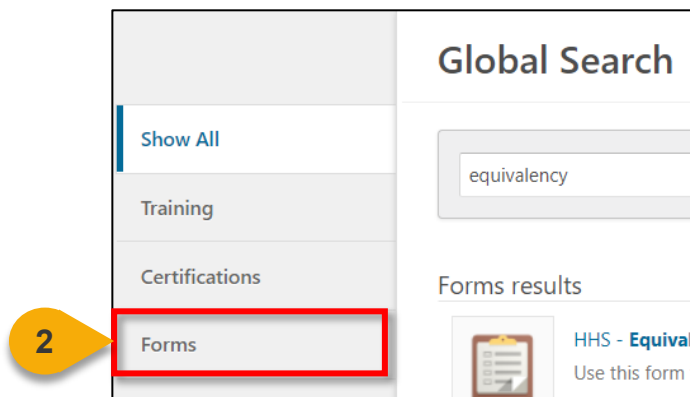
When you want to request Equivalency or Fulfillment for a student...

**NOTE:** Small Agency users cannot submit their own Equivalency/Fulfillment forms. When equivalency or fulfillment is needed, Small Agency users will reach out to their Small Agency Representative (SAR) to submit the request on their behalf.

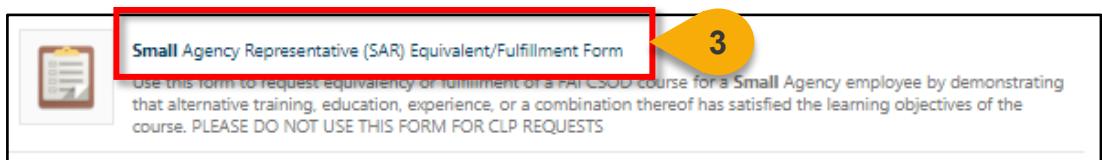
**Step 1:** Use Global Search to search for the keyword “Equivalent”. Click the **Magnifying Glass** to search.



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



**Step 3:** Click on the **Small Agency Representative Equivalency/Fulfillment Form**.



# Submit an Equivalency/Fulfillment Form as a SAR (Cont. 1)

**Step 4:** Enter the **DAUID of the user** who should receive equivalent or fulfillment credit below.

Please identify the user who should receive equivalent or fulfillment credit below.  
**Note: Do not enter your own DAU ID.**

DAU ID \*

Please enter the DAU ID for the user who requires the equivalent or fulfillment. This request cannot be processed without a valid DAU ID.




**Step 5:** Indicate the **reason** for the request.

Please choose why you are submitting this request from the options below (select all that apply). \*

Certification Requirement


Prerequisite Requirement

Mandatory Training Requirement



**Step 6:** Enter **additional information** about your selection from step 5.

If you selected "Certification Requirement" please list the certification. If you selected "Prerequisite Requirement" please list the course.





# Submit an Equivalency/Fulfillment Form as a SAR (Cont. 2)

**Step 7:** Select the **dropdown arrow** to choose the course for which you would like an equivalency.


**Equivalency & Fulfillment Request**  
Please provide the information below to indicate how you have fulfillment requirements for course equivalency.



**Please Select the Course You Would Like Equivalency For**


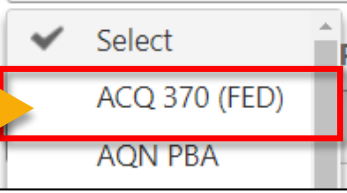
Select  

**Step 8:** Select the **course** from the dropdown menu.

**Please Select the Course You Would Like E**

Select 


 Select 


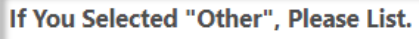

   
ACQ 370 (FED)  
AQN PBA

**Step 9:** If the course 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 the request will not be approved.

**Equivalency & Fulfillment Request**  
Please provide the information below to indicate how you hav

**Please Select the Course You Would Like Equivalency For**

Select 

# Submit an Equivalency/Fulfillment Form (Cont. 3)

**Step 10:** Click the **calendar icons** to enter the Training Start and End dates.

The screenshot shows two input fields. The top field is labeled "Training Start Date:" and has a calendar icon to its right. Below it is the text "Select the equivalent training start date." The bottom field is labeled "Training End Date:" and also has a calendar icon to its right. Below it is the text "Select the equivalent training end date." A yellow callout bubble with the number "10" has two red arrows pointing to the calendar icons in both fields.

**Step 11:** Click **Select File** to add a course completion certificate.

The screenshot shows a section titled "Equivalency Option: Course Completion Certificate". Below the title is a dashed-line box for file upload. To the right of the box is the text "Drag and drop" and a "Select a file" button. A yellow callout bubble with the number "11" points to the "Select a file" button. Below the dashed box is the text "If requesting course equivalency, attach course completion certificate here."

**Step 12:** Click **Select File** to add any supporting documentation in the attachment section. You can add multiple attachments.

The screenshot shows a section titled "Additional Documentation". Below the title is a dashed-line box for file upload. To the right of the box is the text "Drag and drop" and a "Select a file" button. A yellow callout bubble with the number "12" points to the "Select a file" button. Below the dashed box is the text "If needed, attach additional documents here."

**Steps 13 & 14:** Enter any supporting comments in the **Employee Remarks** field. Click **Submit** when done.

The screenshot shows a large text input field labeled "Employee Remarks (Optional)". A yellow callout bubble with the number "13" points to the input field. Below the input field are two buttons: "Cancel" and "Submit". A yellow callout bubble with the number "14" points to the "Submit" button.

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



# **Equivalent/ Fulfillment Request Reviews**

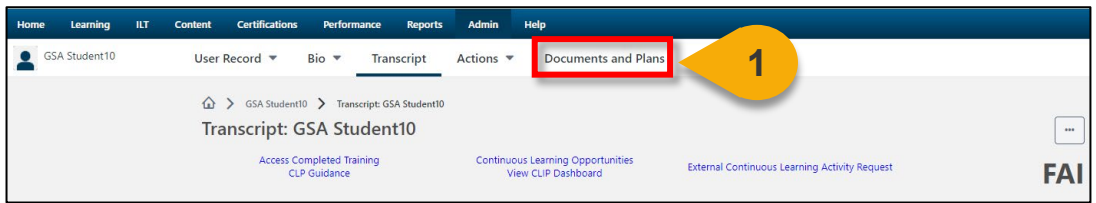


# Audit an Equivalent/Fulfillment Form

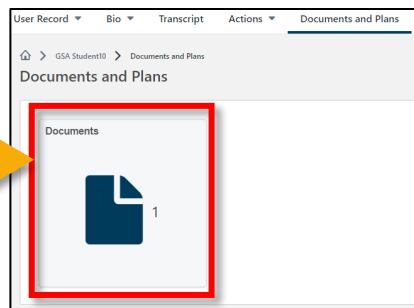
*When you want to review a form submitted by a user...*

**NOTE:** Small Agency users cannot submit their own Equivalency/Fulfillment forms. When equivalency or fulfillment is needed, the Small Agency Representative (SAR) will submit the request on their behalf. To audit a Small Agency user's form, start on the SAR's transcript.

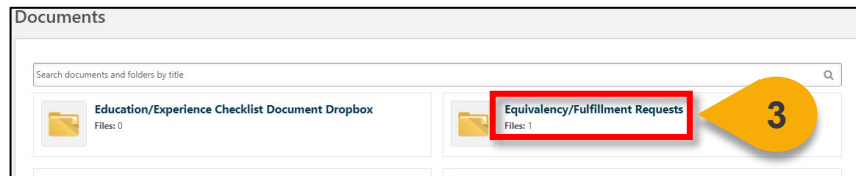
**Step 1:** Use the "View a User's Transcript" task aid to find the User Transcript you wish to view. From the transcript click **Documents and Plans**.



**Step 2:** From the Documents and Plans tab, select **Documents**.



**Step 3:** Select the **Equivalency/Fulfillment Requests** folder.



**Step 4:** Click the **form title** you wish to review.



# Audit an Equivalent/Fulfillment Form (Cont. 1)

**Step 5:** Review the information provided by the user.

GSA - Equivalency/Fulfillment Request Form (v3)

Form approved.

Use this form to request equivalency or fulfillment of a FAI CSOD course by demonstrating that alternative training, education, experience, or a combination thereof has satisfied the learning objectives of the course. PLEASE DO NOT USE THIS FORM FOR CLP REQUESTS

Please confirm your user information below.  
**If this information is not correct, please use the User Record form to update this information prior to submitting your form.**  
Failing to do so may result in your form being routed incorrectly.

Organization

**Steps 6 & 7:** Click the **attached proof of equivalency/fulfillment** to download and review the document. Then you can click **Print to PDF** or **Done**.

Equivalency Option: Course Completion Certificate

BlankDocument.pdf  
176.27 KB

If requesting course equivalency, attach course completion certificate here.

**Additional Documentation**  
If needed, attach additional documents here.

**Employee Remarks (Optional)**  
Please see attached for completion information.

Print to PDF Done

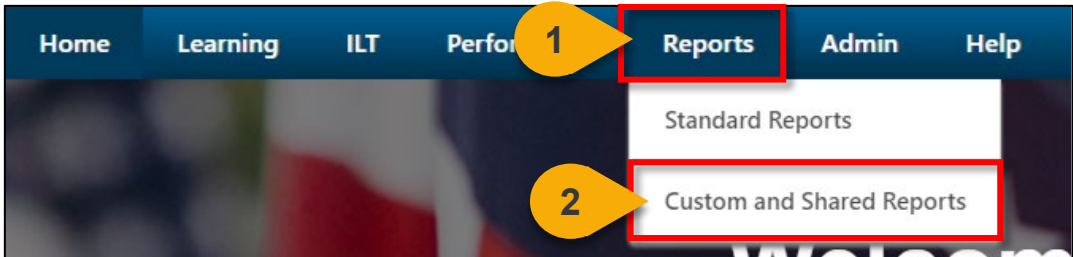


# Reports

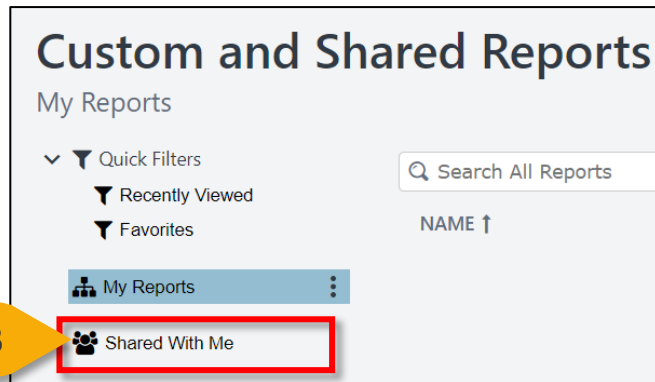
# View and Download Custom Reports

*When you want to filter and download a report...*

**Steps 1 & 2:** Hover over the **Reports** tab, then click **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.



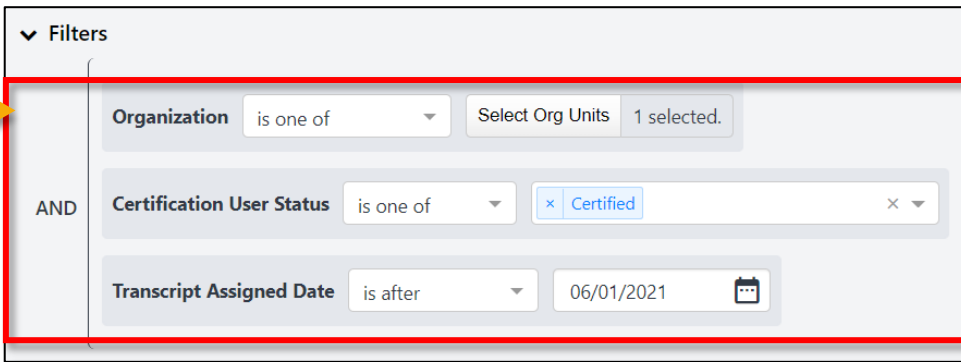
**Step 4:** Click the **Report Name** you would like to view to update the report filters.

FAI Certification Summary	Jonathan Barkand	Never	Shared With Me	
Federal Completions by Organization and Type	Jonathan Barkand	Never	Shared With Me	
Federal Custom Enrollment Report	FAI Admin4	Never	Shared With Me	
Federal Custom No-Show Report	FAI Admin4	Never	Shared With Me	
Federal Custom Registration Report	FAI Admin4	Never	Shared With Me	
Federal Evaluation Report	FAI Admin4	Never	Shared With Me	

**Note:** The yellow warning icon indicates the report has owner constraints applied, whereby the user can view the same level of details as the report owner.

# View and Download Custom Reports (Cont. 1)

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



5

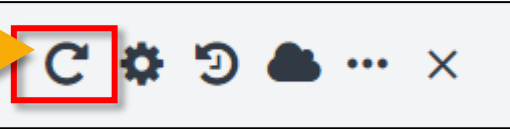
Filters

Organization is one of Select Org Units 1 selected.

AND Certification User Status is one of x Certified x

Transcript Assigned Date is after 06/01/2021

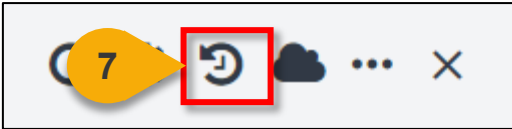
**Step 6:** Click **Refresh this report** icon in the top right corner to see a sample of the newly-filtered report on the bottom portion of the page.



6

Refresh this report icon

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



7

Schedule for now icon

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

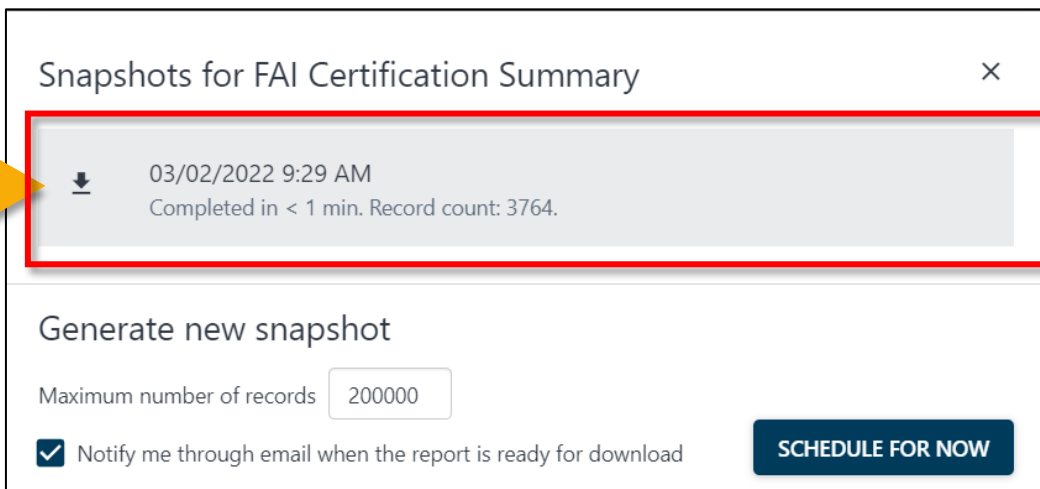


8

Download the report icon

# View and Download Custom Reports (Cont. 2)

**Step 9:** Click on the file download.



Snapshots for FAI Certification Summary

↓ 03/02/2022 9:29 AM  
Completed in < 1 min. Record count: 3764.

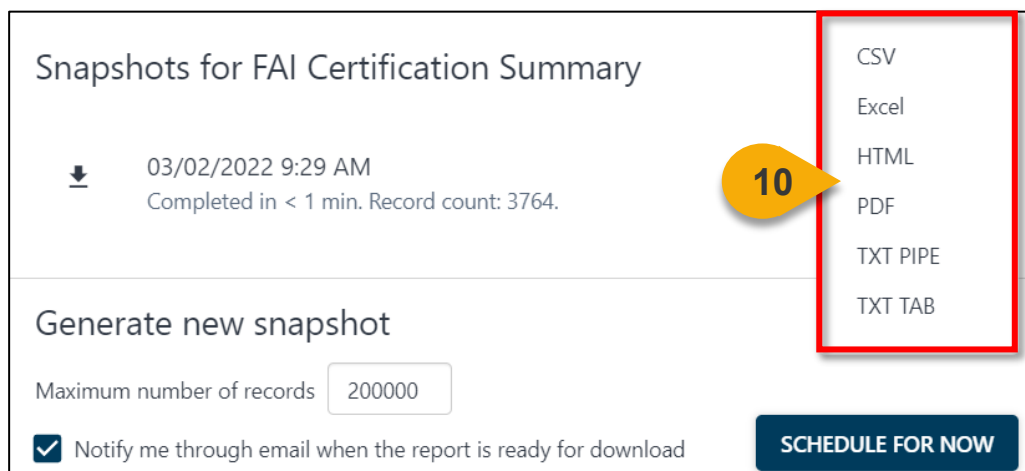
Generate new snapshot

Maximum number of records

Notify me through email when the report is ready for download

**SCHEDULE FOR NOW**

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



Snapshots for FAI Certification Summary

↓ 03/02/2022 9:29 AM  
Completed in < 1 min. Record count: 3764.

Generate new snapshot

Maximum number of records

Notify me through email when the report is ready for download

**SCHEDULE FOR NOW**

- CSV
- Excel
- HTML
- PDF
- TXT PIPE
- TXT TAB



# **Additional Resources**

# Additional Resources

Support Area	Support Provided	Contact
Defense Acquisition University (DAU) Help Desk	<ul style="list-style-type: none"> <li>FAI CSOD System Questions and Issues</li> <li>FAI CSOD System Errors and Troubleshooting</li> <li>Password Issues and Resets</li> </ul>	Email: <a href="mailto:DAUHelp@dau.edu">DAUHelp@dau.edu</a> Phone: (703) 805-3459, X1
Your Agency's Acquisition Career Manager (ACM)	<ul style="list-style-type: none"> <li>Agency-specific Acquisition Training, Certification, and Continuous Learning (CL) Requirements</li> <li>Agency-specific Acquisition Policies and Procedures</li> <li>Career Development</li> <li>Training and Development Opportunities</li> </ul>	<a href="https://www.fai.gov/humancapital/acquisition-career-manager-acm">https://www.fai.gov/humancapital/acquisition-career-manager-acm</a>
FAI CSOD Training Materials and Online Resources	<ul style="list-style-type: none"> <li>Task Aids for FAI CSOD Roles</li> <li>FAI CSOD Training Videos</li> <li>Other Guidance for Performing Tasks in FAI CSOD</li> </ul>	<a href="https://dau.csod.com/catalog/CustomPage.aspx?id=221000511">https://dau.csod.com/catalog/CustomPage.aspx?id=221000511</a>  <a href="https://dau.csod.com/catalog/CustomPage.aspx?id=221000509">https://dau.csod.com/catalog/CustomPage.aspx?id=221000509</a>
FAI Website FAQs	<ul style="list-style-type: none"> <li>FAI CSOD Migration</li> <li>Acquisition Training</li> <li>Federal Acquisition Certifications (FAC-C, FAC-COR, FAC-P/PM)</li> <li>More!</li> </ul>	<a href="https://www.fai.gov/page/migration-faitas-fai-cornerstone-ondemand-csod-faqs">https://www.fai.gov/page/migration-faitas-fai-cornerstone-ondemand-csod-faqs</a>
FAI Staff	All other questions	<a href="mailto:faicsod@gsa.gov">faicsod@gsa.gov</a>





# Agency Addendums

# DOI

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Use this form to request training equivalency for initial certifications. It is not to be used for Continuous Learning requests. Additionally, the form will be processed at the bureau-level.

Please contact your Bureau Acquisition Career Coordinator (BACC) with any questions. You will find your BACC contact information at the following link: DOI Acquisition Toolkit: Bureau Acquisition Career Coordinator  
<https://doimspp.sharepoint.com/sites/DOIToolKit/SitePages/DOI-Acquisition-Toolkit.aspx>

After approval, you will see the equivalent course appear on your transcript within 14 days