# How to Use the Senior Member Education and Training Tools in eServices

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Where do I find the tools that support the Senior Member Education and Training Program?

1. Go to [https://www.capnhq.gov](https://www.capnhq.gov) and log into eServices.

2. Activate the drop-down **Menu** on the top left by clicking the “hamburger” icon.

3. Activate the menu for Professional Development by clicking on the caret.

4. Choose the **Professional Levels** link from the menu. You can now access the tools that support the Senior Member Education and Training Program.
• Using the **Professional Levels** link in the **Accomplishments** box will allow a member, Education and Training Officer, or commander to see what requirements have been met and what requirements still need completed by a member for a level in the Senior Member Education and Training Program.

• Using the **Cohort Request** link in the **Volunteer University** box will allow members to sign up for the next available online cohort.

• Using the **Member Path Status** link in the **Reports** box will allow Education and Training Officers and Commanders to see what a group of members have completed and what needs completed in a level.
How do I sign up for an online cohort for Volunteer University?

What is a cohort? A cohort is a group of up to 25 online learners who will be supported by four instructors as they accomplish modules in a level or an entire level in the Senior Member Education and Training Program.


2. Activate the drop-down Menu on the top left by clicking the “hamburger” icon.

3. Activate the menu for Professional Development by clicking on the caret.

4. Choose the Professional Levels link from the menu.
5. Click on the **Cohort Request** link in the **Volunteer University** box.

6. From the **Available Paths** menu, activate the drop-down menu.

7. Select the training from the menu that you wish to join a cohort to complete. In this example, I chose Level 1. Please note cohorts are only utilized for online modules. Click the **Submit Request** button to be added to the list for cohort assignment.

8. You should see a confirmation message in the top right corner and the request will appear on the **Current Pending Requests** list below the **Cohort Request Form** title.

9. Volunteer University will contact you with information for the next available cohort. Cohorts generally begin on the first Tuesday of each month.
Notes:

- For Level 2, there are two options (Level 2, Part 1 and Level 2, Part 2). To help us manage the sign ups more effectively, please sign up for Level 2 Part 1 for access to all modules in Level 2.
- You will automatically get access to the command electives in any level when you are enrolled in the corresponding level (Level 3-Squadron or Flight Command, Level 4-Group Command, Level 5-Region Command). You only need to sign up for a command elective path if you wish to take it before or after the corresponding level. For example, you are a squadron commander and working on completing Level 2. You would need to sign up for the Squadron Commander path to get access to the commander training. Similarly, if you are in Level 5 and want to complete the Group Commander electives which are connected to Level 4, you would need to sign up for the GCC Path.
- Your name will disappear from the list when we assign you to a cohort. There is no need to put your name on the list again.
- Please do not “test the tools” by signing up for a cohort you do not intend to take. Your name populates our lists and has to be reviewed and managed like all other names. This impacts our workflow and our instructor pool. Signing up for “test” cohorts you do not need may block you from signing up from the cohort you need.
- Entry Validators can add and validate/approve tasks in one step. Use these staff positions to enter credit for big events like conference, encampment staff service, etc. This manages the workload efficiently. Entry Validators cannot approve tasks entered by others.
  - Entry Validators: Commanders, Vice Commanders, Chiefs of Staff, Deputy Commanders, Deputy Commanders for Seniors, Administrative Officers, DCS PD (Education and Training), Director of Administration, Director of Professional Development (Education and Training), Personnel Officers, Professional Development Officers (Education and Training Officers).
- An Approval Authority can approve fully completed levels as well as validate/approve tasks.
  - Approval Authority: Commanders, Vice Commanders, Chiefs of Staff, Deputy Commanders, Deputy Commanders for Seniors.
How do I enter Summary Conversation completion in my Accomplishments?

1. Click on the **Professional Levels** link in the **Accomplishments** box.

2. Select a level from the **Select Level** drop-down menu on the right.

3. Scroll down on the **Accomplishments** page until you see the “Summary Conversation” task.
4. Click to check box to the left of the “Summary Conversation” task.
5. Enter the date the Summary Conversation was completed.
6. In the Comments box, enter the ID number or name of the person who conducted the Summary Conversation.

7. Scroll to the bottom of the page and click the Submit button on the lower left.

8. In the Status column, the task will appear as PENDING until an Approval Authority has approved it. If an Entry Validator enters the task, it will automatically approve it.

9. Once an Approval Authority approves the task, it will show APPROVED in the Status column.
How do I enter conference credit in my Accomplishments?

1. Click on the **Professional Levels** link in the **Accomplishments** box.

2. Select Level 3 from the **Select Level** drop-down menu on the right.

3. Scroll down on the **Accomplishments** page until you see the “Attend Wing, Region or National Conference 1” task.

4. Click to check box to the left of the “Attend Wing, Region or National Conference 1” task.
5. Enter the date of the conference in the **Date Completed** box.
6. In the **Comments** box, enter the date and location of the conference.
7. Click the **Browse** button to upload proof of attendance.
8. Choose the file you wish to upload. This can be a certificate, participation letter, etc.
9. Click the **Open** button.

10. Click the **Submit** button.

11. In the **Status** column, the task will appear as **PENDING** until an Approval Authority has approved it.

12. Once an Approval Authority approves the task, it will show **APPROVED** in the **Status** column.
How do I see what I have completed and what remains to be completed in a level?

1. Click on the Professional Levels link in the Accomplishments box.

2. Select a level from the Select Level drop-down menu on the right.

3. Scroll through the tasks. Completed tasks will have the word APPROVED in the Status column and a date in the Date Completed column like the two tasks in the Level 1 Group 2 section above.
4. Tasks that need to be completed will not have a date or a status. The “OPSEC and Cybersecurity” task in Level 1 Group 3 section is incomplete. The tasks in Level 1 Group 4 section (“My Learning Path” and “Introduction to Mentoring in Civil Air Patrol”) above are incomplete.
As a member or Entry Validator, how do I enter the Path to Progression in Level 1 so a member is enrolled in the correct path for Level 2?

1. Click on the **Professional Levels** link in the **Accomplishments** box.

2. Select Level 1 in the **Select Level** drop-down menu on the right. Scroll to the bottom of the page.

3. Choose the Progression to Path task most suited to the member. Members may qualify for more than one path and will need to choose the most appropriate option. This choice impacts the modules a member sees in Level 2.
   a. Progression to Path for Level 2- CADET: This path is tailored for members who recently served as cadets because it focuses on transitioning from cadet to senior. Members who were cadets several years ago will be more satisfied by the new member path.
b. Progression to Path for Level 2- MILITARY: This path is tailored for members who are currently serving in or formerly served in the military.

c. Progression to Path for Level 2-NEW: This path is tailored for new members with no experience in Civil Air Patrol, who have not been in the military, and who will not receive advanced grade based on professional qualifications.

d. Progression to Path for Level 2-PROFESSIONAL: This path is tailored for members who will receive a promotion to advanced grade based on their professional qualifications (educators, health personnel, lawyers, chaplains, CFIs, etc.).

4. Scroll down to the bottom of the page.

5. Choose the appropriate Path to Progression task by clicking the box next to it.
6. Enter the date.
7. Click the **Submit** button.
8. If you are an Entry Validator, the task will automatically be entered and validated in one step. If you are a member, the task will show as PENDING until approved by an Approval Authority.
As a member, how do I submit a level that has been completed so that I might advance to the next level?

1. When a member completes all requirements for a level, a blue bar appears at the top of the page with a **Submit Path for Approval** button. The member can click the **Submit Path for Approval** button to begin the approval process.

2. The member confirms that he or she wishes to submit the path for approval by clicking the **Submit Path** button.

Note the blue bar at the top of the **Accomplishments** page now indicates that this member has a path pending approval.
As an Approval Authority, how do I approve a task for a member?

1. Click the blue Approvals Paths/Tasks button above the Accomplishments box to see any tasks or levels pending approval.
2. A list of Paths (Levels) or Tasks requiring approval will appear. Click the green Check Mark to approve a path or task. Click the red X to disapprove a path or task.

3. Click the Approve button.

A green box will appear in the top right corner indicating Credit Approved.

Once an item is approved, the blue bar turns green on the member’s Accomplishments page.
As an Approval Authority, how do I approve a level so that a member can advance to the next level?

If you are an Approval Authority with approvals pending, you will see a blue Approvals Path/Tasks button on the Professional Levels page in eServices. In the screenshot below, the Approval Authority has one item to approve.

1. Click the blue Approvals Paths/Tasks button to see what tasks or paths are pending approval.

2. Choose the green Check Mark to approve and the red X to disapprove a path or task.

3. Click the Approve button.

A green box will appear in the top right corner indicating Credit Approved.
If you are the final approving authority the blue bar will turn green, the member will see credit in eServices, and the member will be able to start the next level of training.

If you are not the final approving authority, the request will escalate in the system until all required approvals have been obtained.
How do I use the Member Path Status Report to find out what members in a unit need to complete or have completed?

Member Path Status is a report used to determine what a member or a series of members or a unit has complete or incomplete for a Path (Level) in the Senior Member Education and Training Program. Education and Training personnel at all levels, leaders, and mentors can use this tool to plan training or to help members progress. The tool allows a search by CAPID(s) or by organization.

1. Click the **Member Path Status** link in the **Reports** box.

2. Click the **Search by Organization** button.

3. Select a Level from the **Select Path** drop-down menu.
4. Select Complete or Incomplete from the **Select Status** drop-down menu.
5. Select a unit from the **Select Organization** drop-down menu.
6. Click the **Filter Report** button.
The report generated by the tool shows all members in the unit who have not completed the path (level). For each grouping of tasks, one can see how many are completed. This information can be used to plan which groupings of modules should be offered for the selected unit.

In this screenshot, the first member has some tasks completed and the other members do not.
If more detail is desired, click the **Export to Excel** button.

In the Excel export, we can see the break down by module of the training these members need.
How do I use the Member Path Status Report with a series of CAPIDs to find out what members need to complete or have completed?

1. Click the **Search By CAPID** button.

2. Select a level from the **Select Path** drop-down menu.

3. Select Complete or Incomplete from the **Select Status** drop-down menu.

4. Enter a series of ID numbers in the **Enter CAPIDs** box. Separate the IDs with commas.

5. Click the **Magnifying Glass** to ensure all the IDs you entered are valid.
6. The Magnifying Glass will turn green and a message in the upper right corner will confirm that all IDs are valid.

7. Click the **Filter Report** button.

We can now see what these members need to complete for the level we selected.