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

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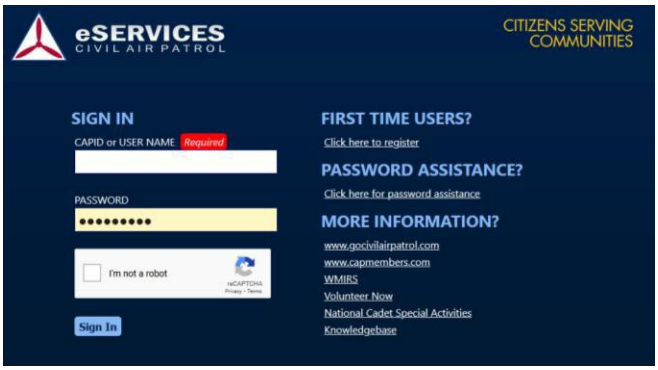
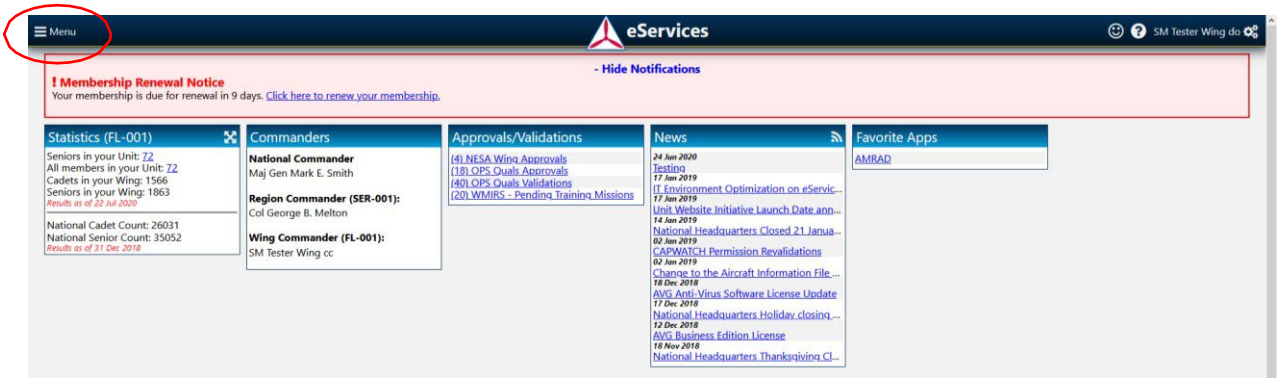
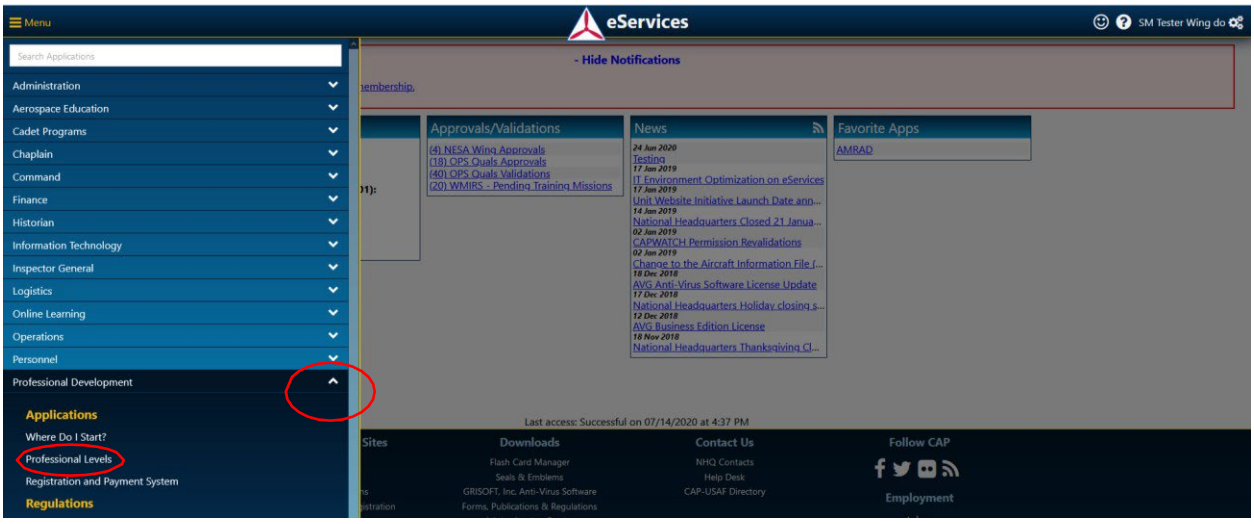
## Where do I find the tools that support the Senior Member Education and Training Program?



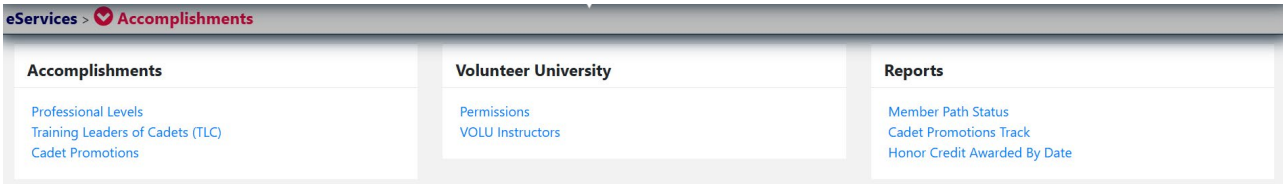

1. Go to [https://www.capnhq.gov](https://www.capnhq.gov) and log into eServices.




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

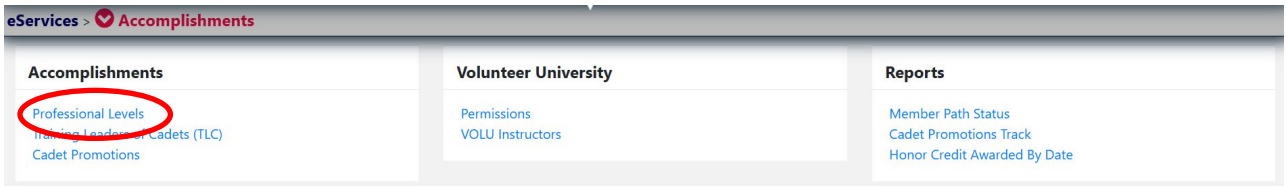



3. Activate the menu for Professional Development by clicking on the caret.
4. Choose the **Professional Levels** link from the menu. You can now access the tools that support the Senior Member Education and Training Program.

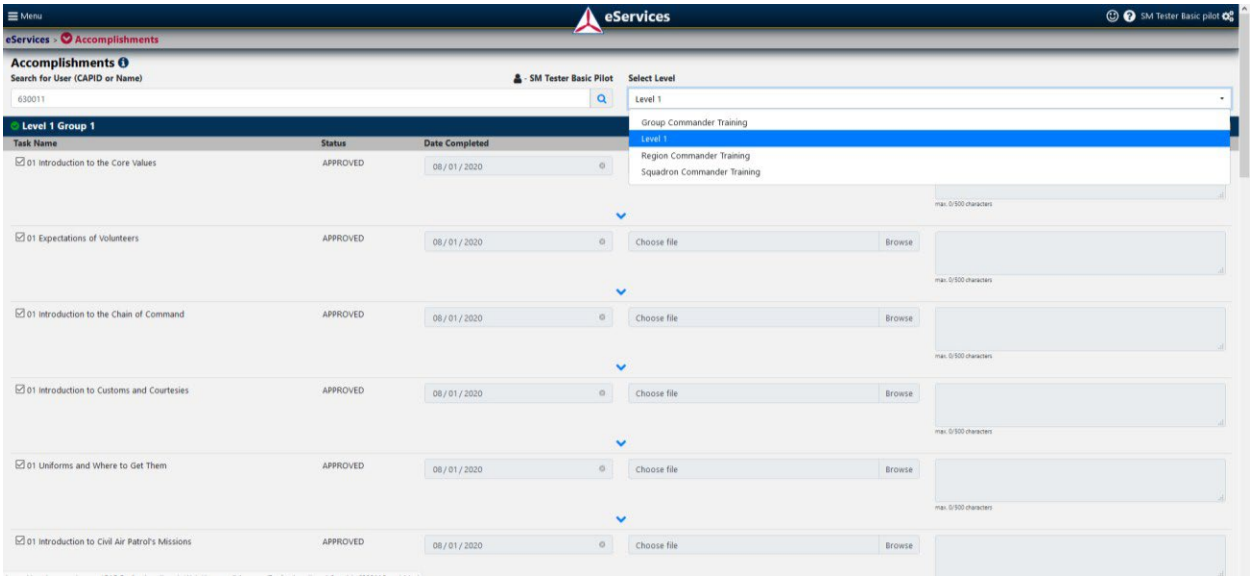



- Using the **Professional Levels** link in the **Accomplishments** box will allow a member, Education and Training Officer, or commander to see what requirements have been met and what requirements still need completed by a member for a level in the Senior Member Education and Training Program.
- Using the **VOLU Instructors** link in the **Volunteer University** box will allow members to search for instructors by unit and Professional Level.
- 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.

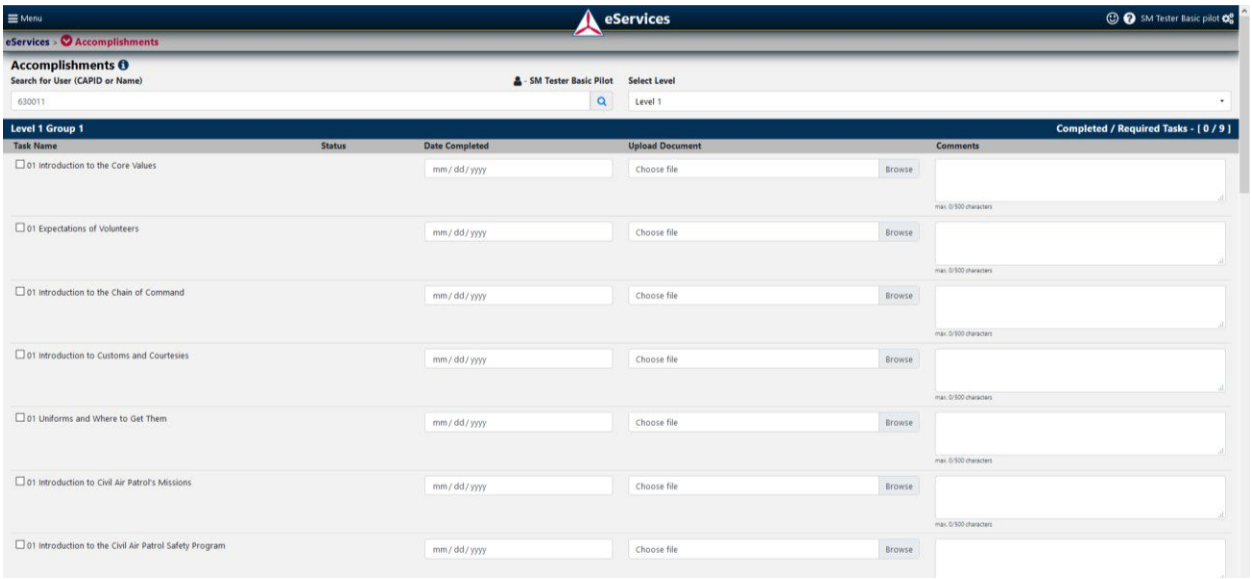
## How do I enter Summary Conversation completion in my Accomplishments?



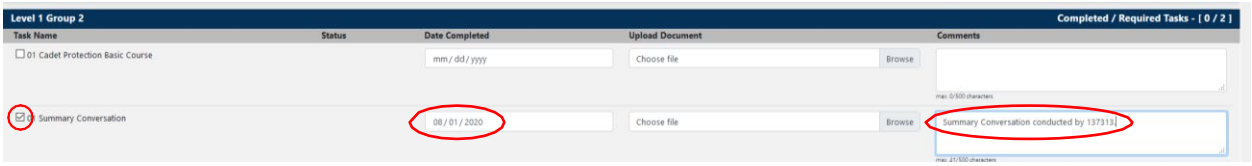

1. Click on the **Professional Levels** link in the **Accomplishments** box.



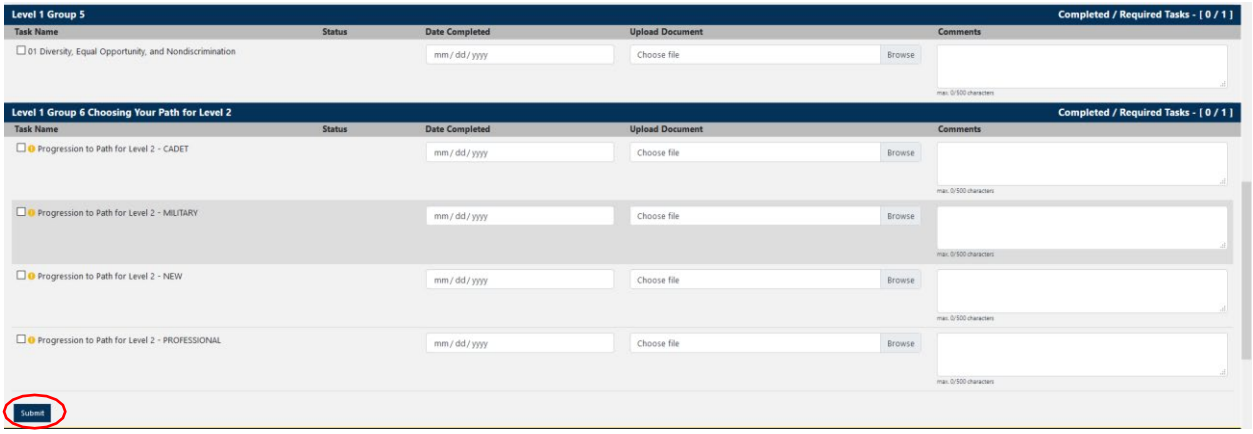

2. Select a level from the ***Select Level*** drop-down menu on the right.




3. Scroll down on the ***Accomplishments*** page until you see the “Summary Conversation” task.

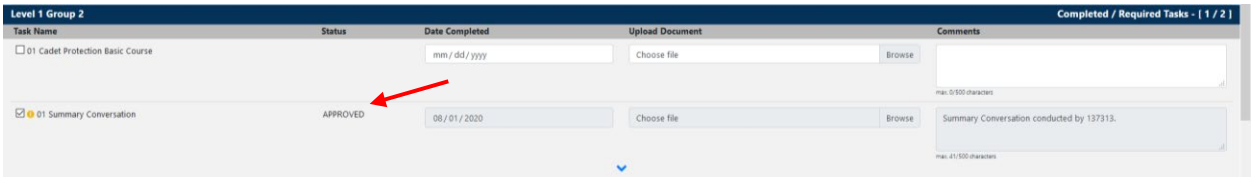



4. Click to check box to the left of the “Summary Conversation” task.
5. Enter the date the Summary Conversation was completed.
6. In the **Comments** box, enter the ID number or name of the person who conducted the Summary Conversation.



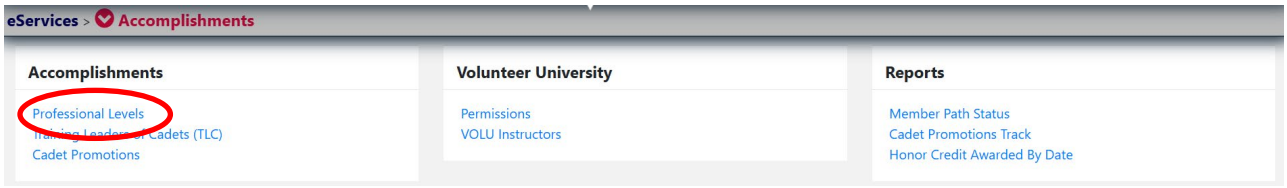

7. Scroll to the bottom of the page and click the **Submit** button on the lower left.

8. In the **Status** column, the task will appear as PENDING until a validator has approved it.

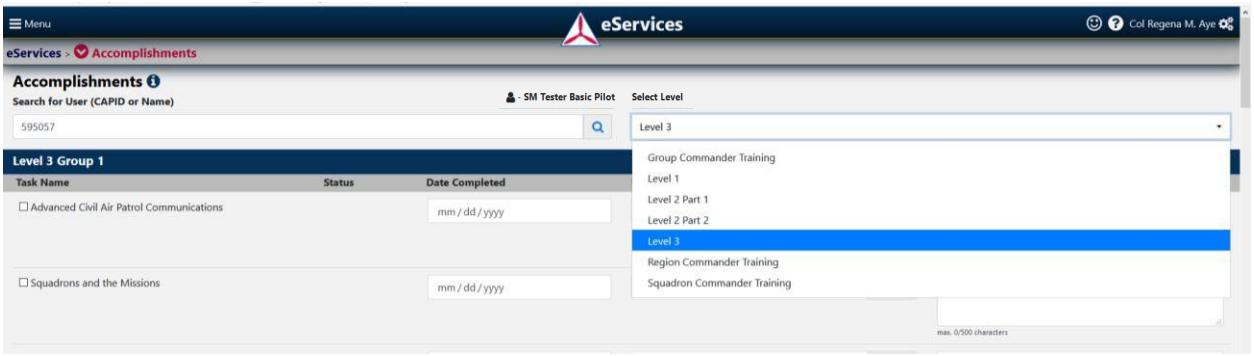



9. Once a validator approves the task, it will show APPROVED in the **Status** column.

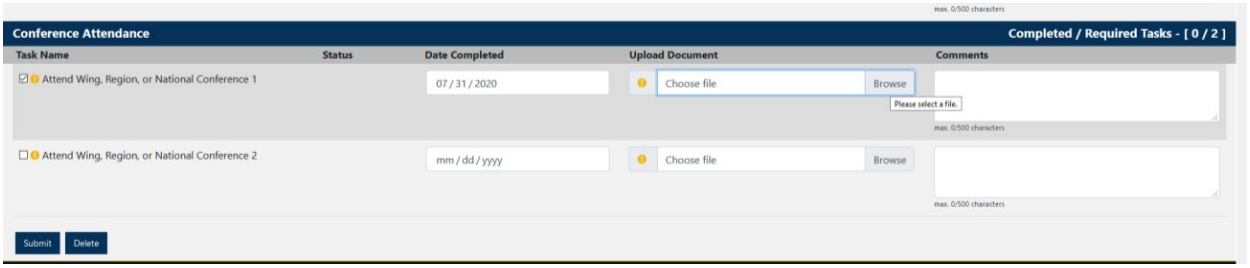
## How do I enter conference credit in my Accomplishments?



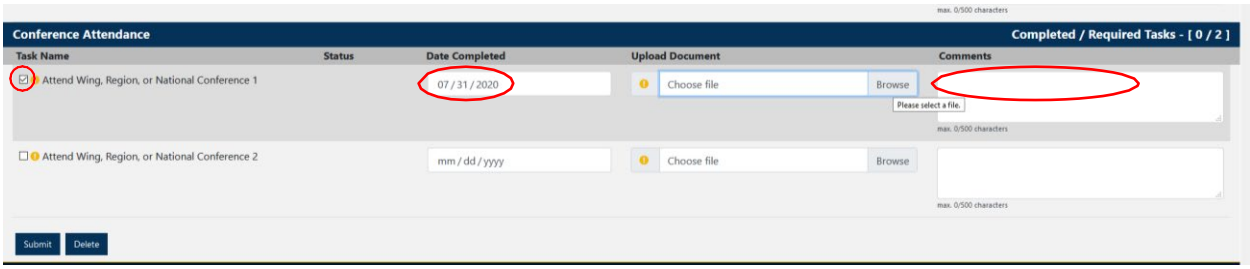

1. Click on the **Professional Levels** link in the **Accomplishments** box.



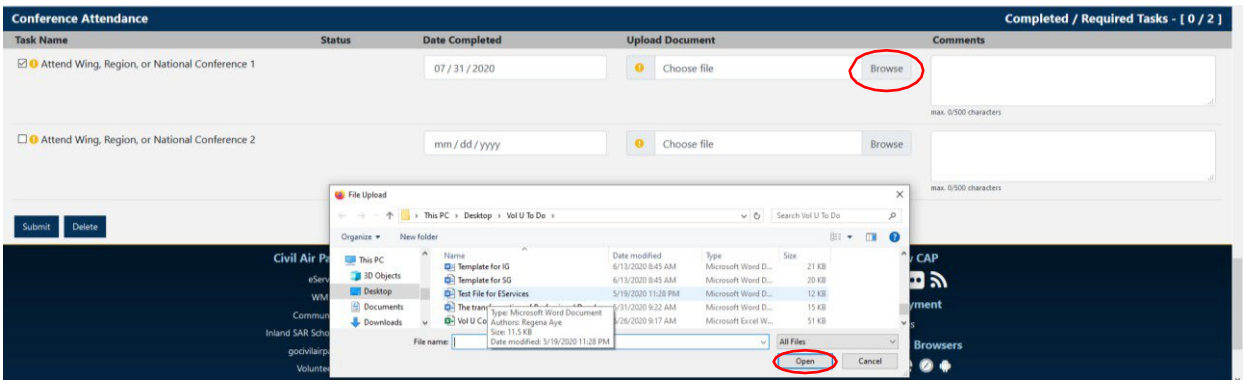

2. Select Level 3 from the ***Select Level*** drop-down menu on the right.



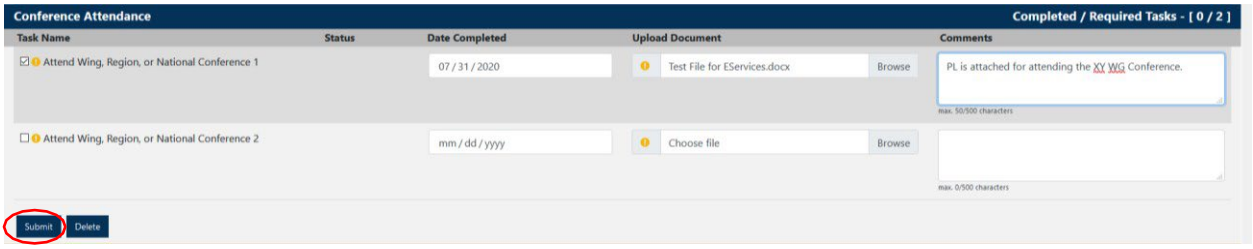

3. Scroll down on the **Accomplishments** page until you see the "Attend Wing, Region or National Conference 1" task.



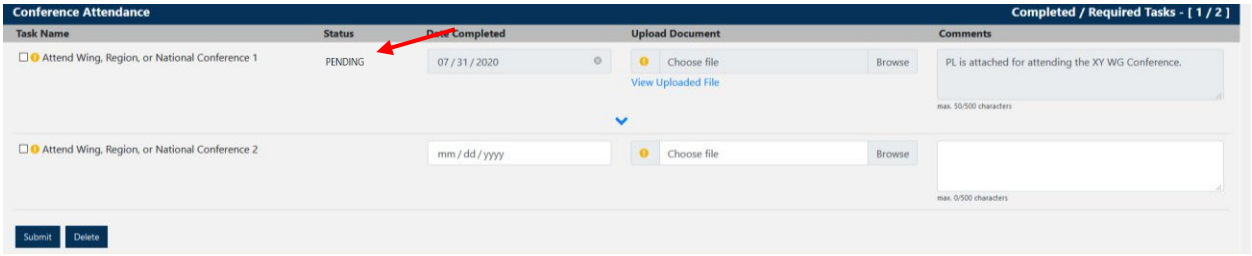

4. Click to check box to the left of the "Attend Wing, Region or National Conference 1" task.
5. Enter the date of the conference in the **Date Completed** box.
6. In the **Comments** box, enter the date and location of the conference.



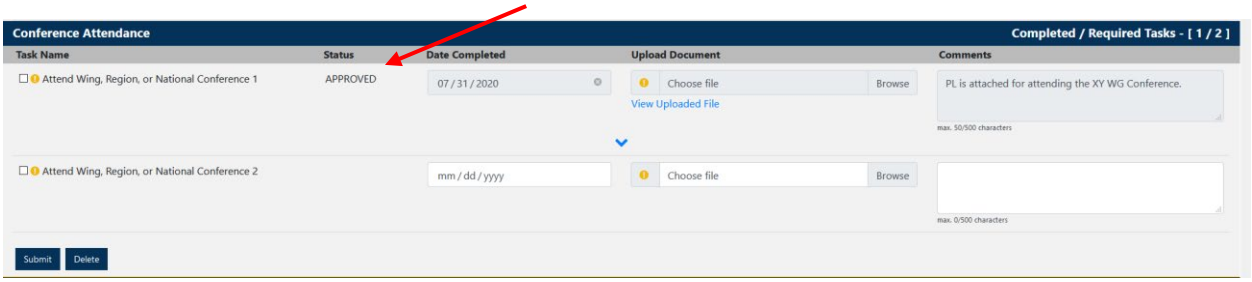

7. Click the **Browse** button to upload proof of attendance.
8. Choose the file you wish to upload. This can be a certificate, participation letter, etc.
9. Click the **Open** button.




10. Click the **Submit** button.

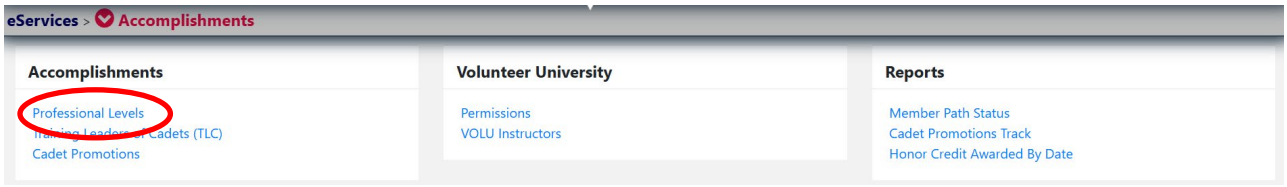



11. In the **Status** column, the task will appear as PENDING until a validator has approved it.

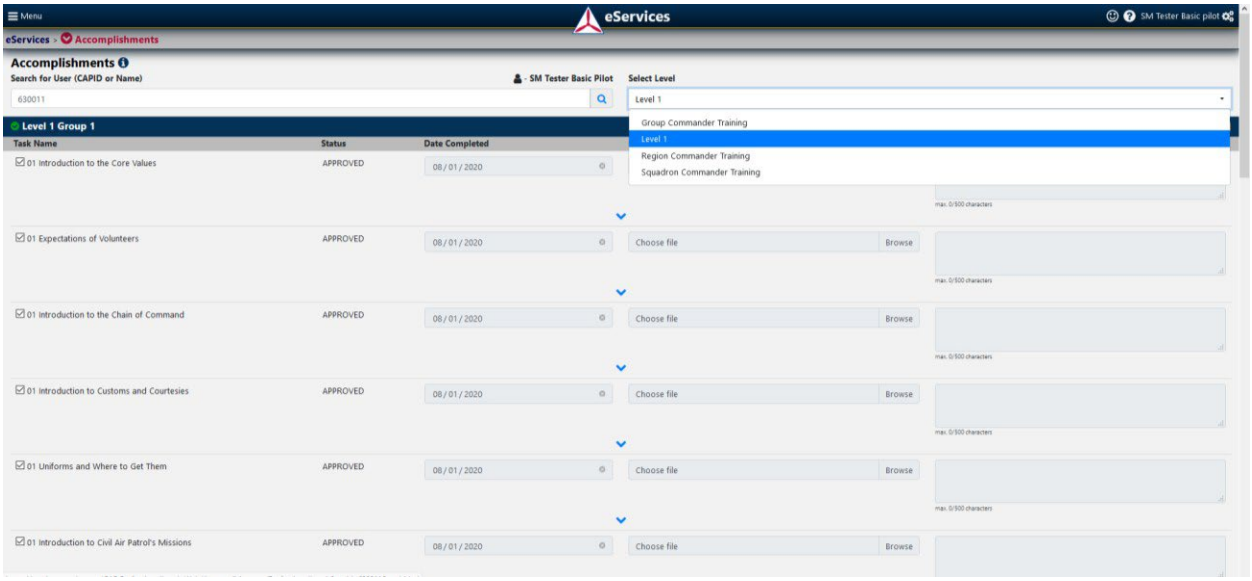



12. Once a validator approves the task, it will show APPROVED in the **Status** column.

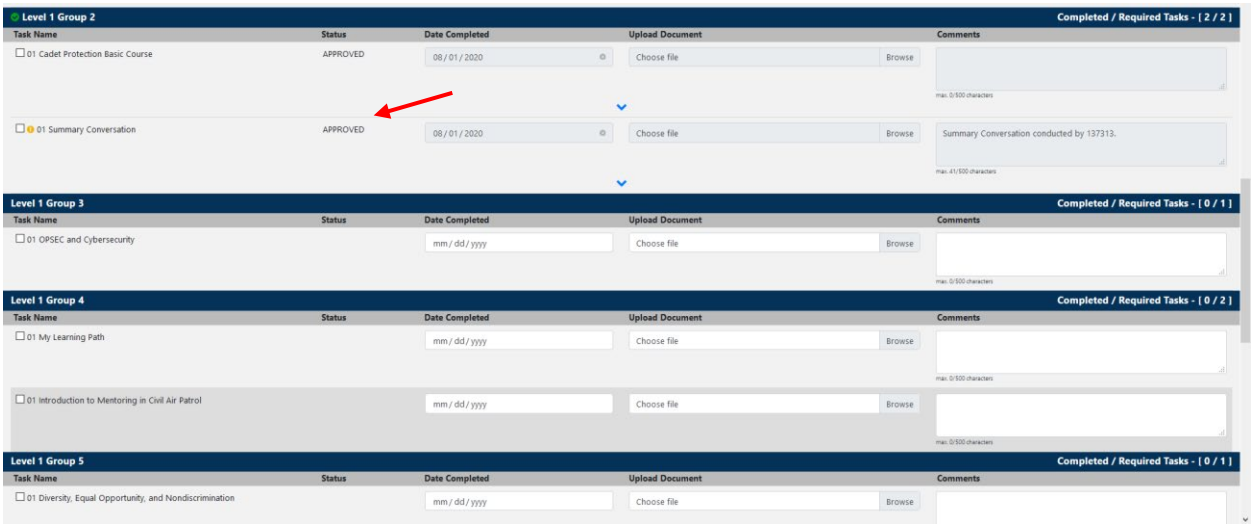
## How do I see what I have completed and what remains to be completed in a level?



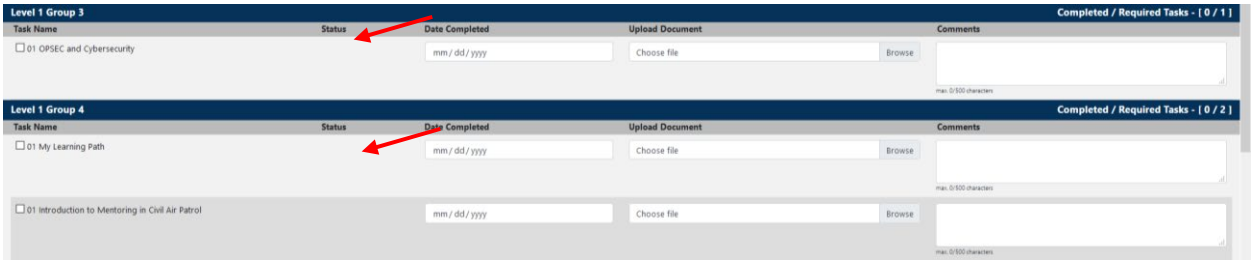

1. Click on the **Professional Levels** link in the **Accomplishments** box.




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

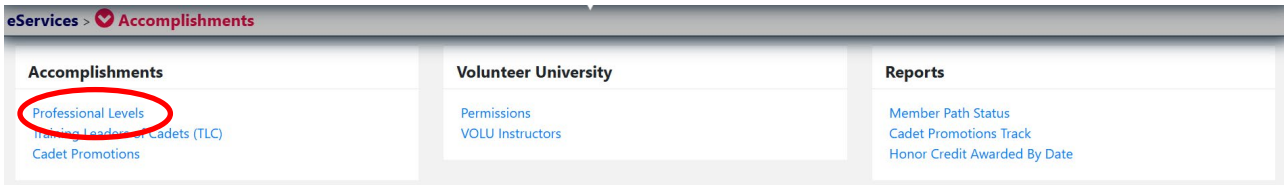



3. Scroll through the tasks. Completed tasks will have the word APPROVED in the **Status** column and a date in the **Date Completed** column like the two tasks in the **Level 1 Group 2** section above.

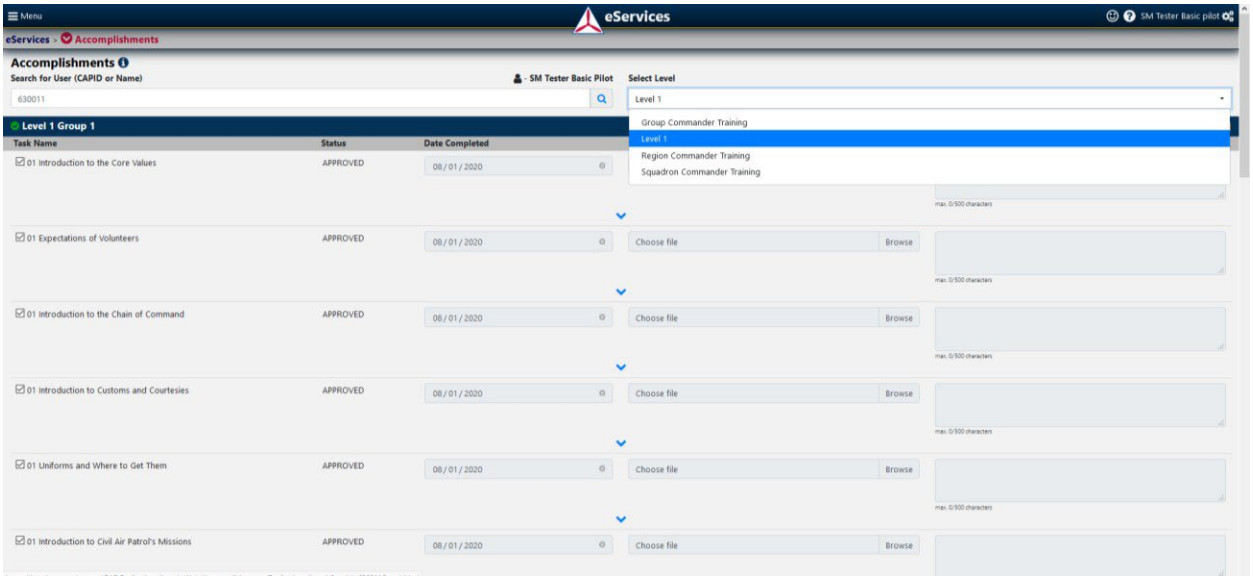



4. Tasks that need to be completed will not have a date or a status. The “OPSEC and Cybersecurity” task in **Level 1 Group 3** section is incomplete. The tasks in **Level 1 Group 4** section (“My Learning Path” and “Introduction to Mentoring in Civil Air Patrol”) above are incomplete.

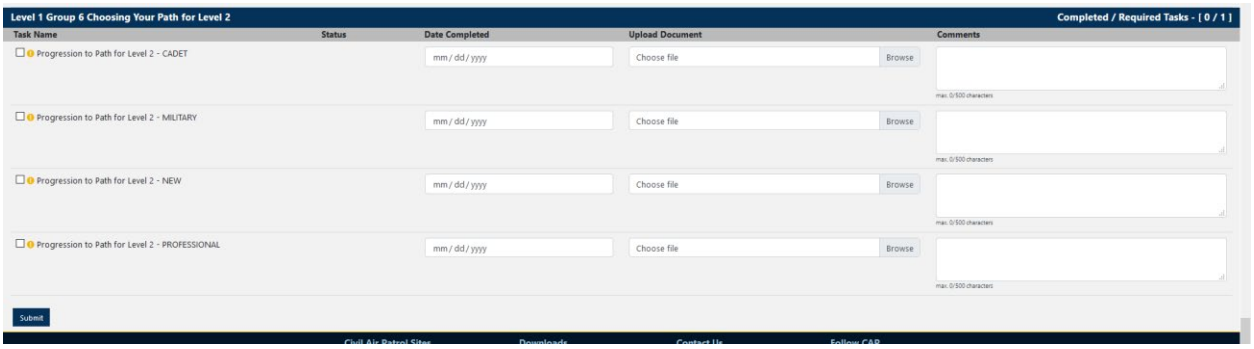
## As a member or entry validator, how do I enter the Path to Progression in Level 1 so a member is enrolled in the correct path for Level 2?




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



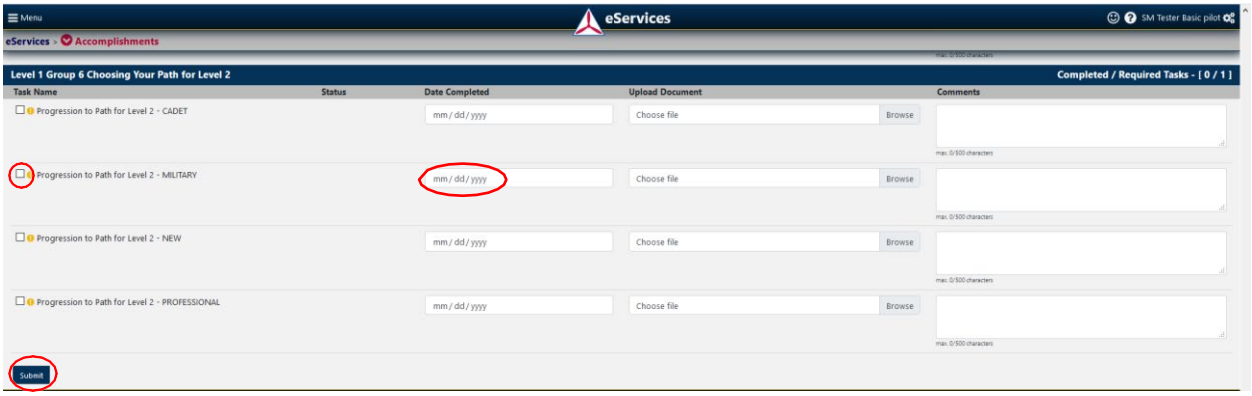

2. Select Level 1 in the ***Select Level*** drop-down menu on the right. Scroll to the bottom of the page.




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.

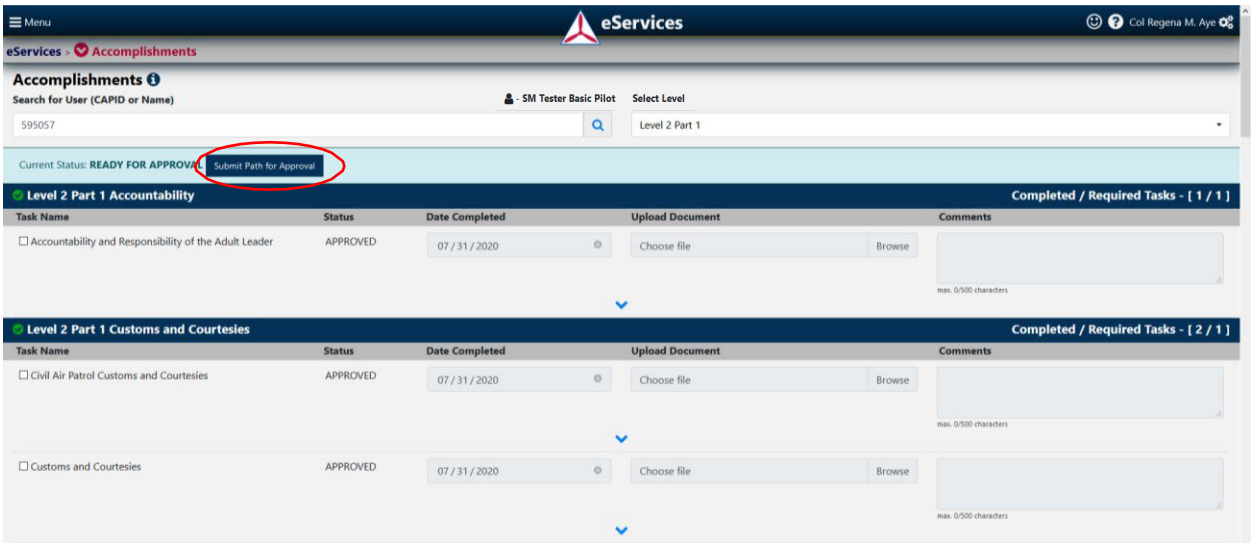
b. Progression to Path for Level 2- MILITARY: This path is tailored for members who are currently serving in or formerly served in the military.
c. Progression to Path for Level 2-NEW: This path is tailored for new members with no experience in Civil Air Patrol, who have not been in the military, and 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.

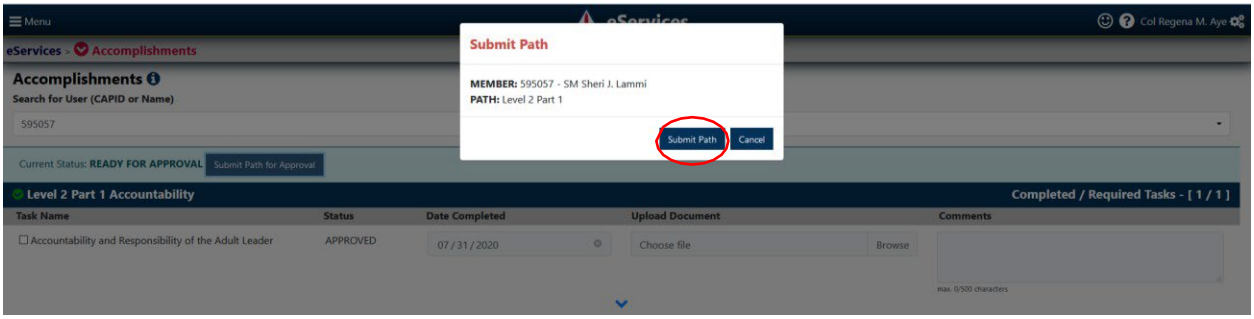



5. Choose the appropriate Path to Progression task by clicking the box next to it.
6. Enter the date.
7. Click the **Submit** button.
8. If you are an approval authority, the task will automatically be entered and validated in one step. If you are a member, the task will show as PENDING until approved by a validator.

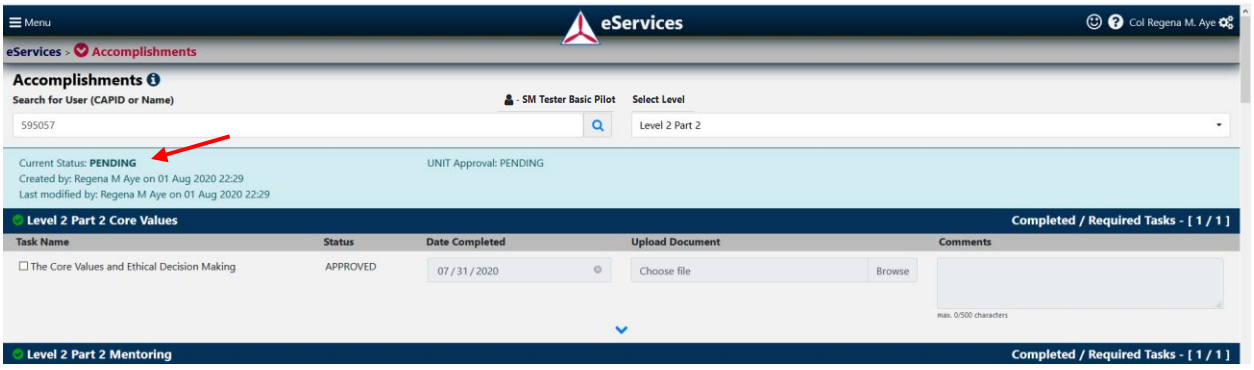
## As a member, how do I submit a level that has been completed so that I might advance to the next level?




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.

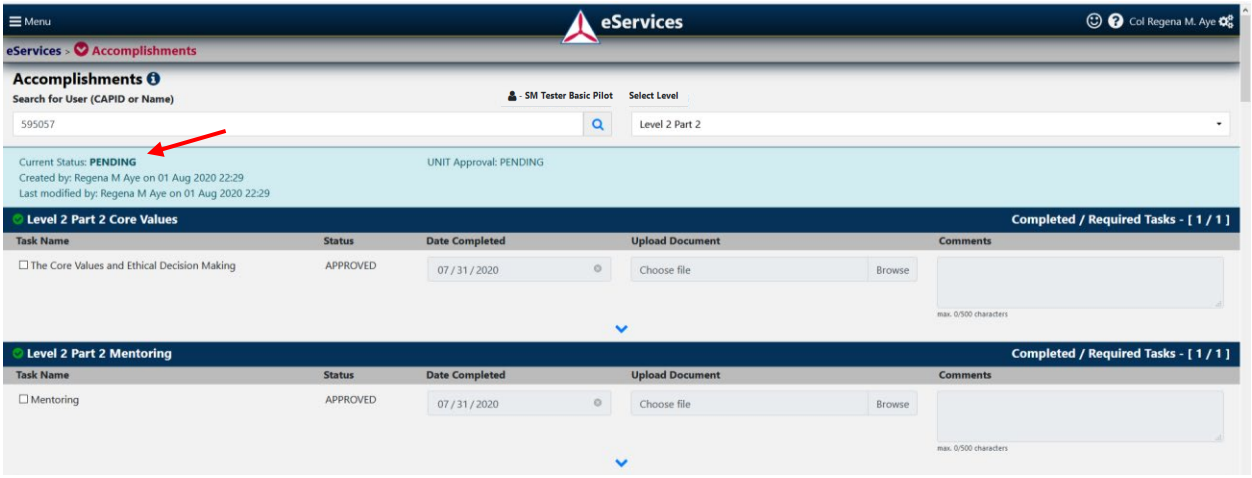



2. The member confirms that he or she wishes to submit the path for approval by clicking the **Submit Path** button.

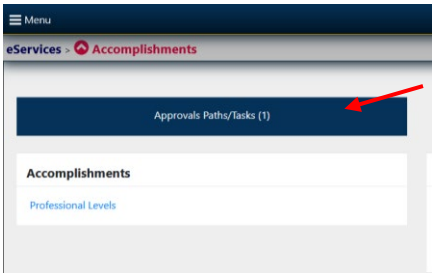



Note the blue bar at the top of the **Accomplishments** page now indicates that this member has a path pending approval.

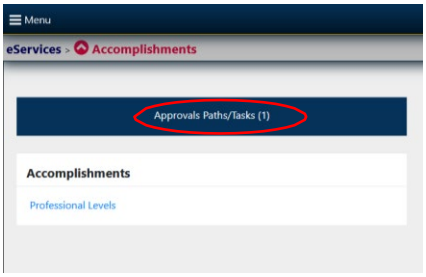
## As a validator or approval authority, how do I approve a task for a member?



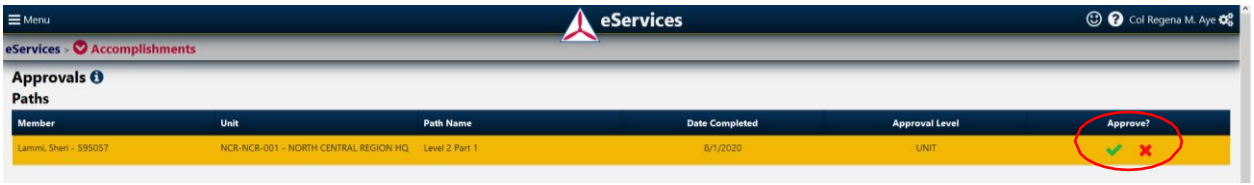

Note the blue bar at the top of the **Accomplishments** page that indicates this member has an item pending approval.




If you are an approval authority, you will see a blue **Approvals Path/Tasks** button on the **Professional Levels** page in eServices. In the screenshot above, the approval authority has one item to approve.

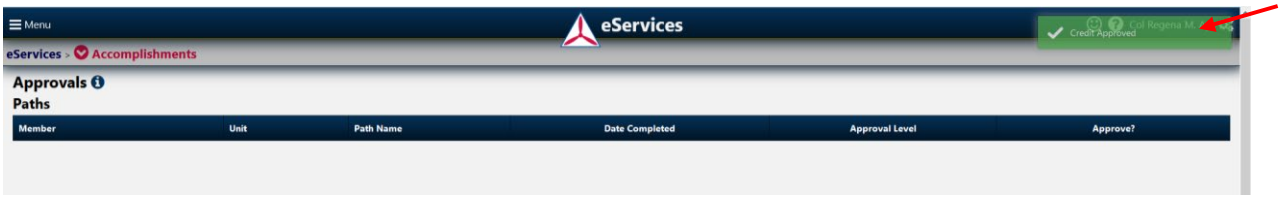



1. Click the blue **Approvals Paths/Tasks** button above the **Accomplishments** box to see any tasks or levels pending approval.

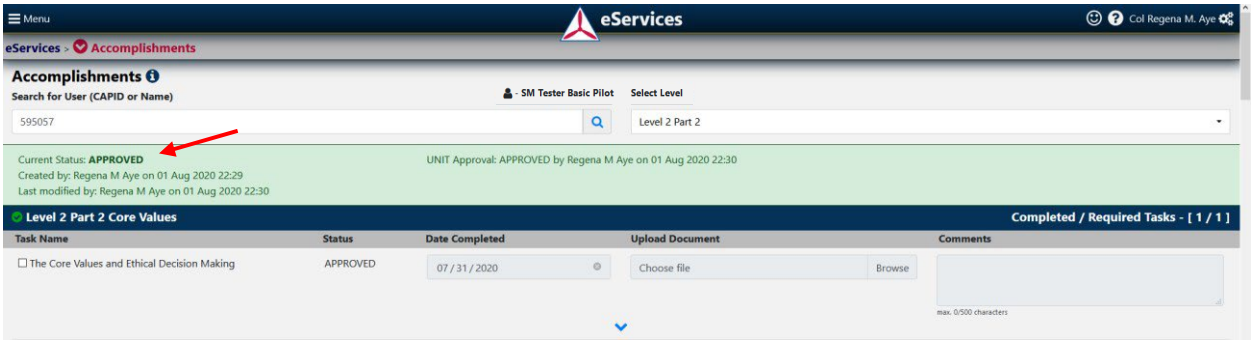



2. A list of Paths (Levels) or Tasks requiring approval will appear. Click the **green Check Mark** to approve a path or task. Click the **red X** to disapprove a path or task.

3. Click the **Approve** button.



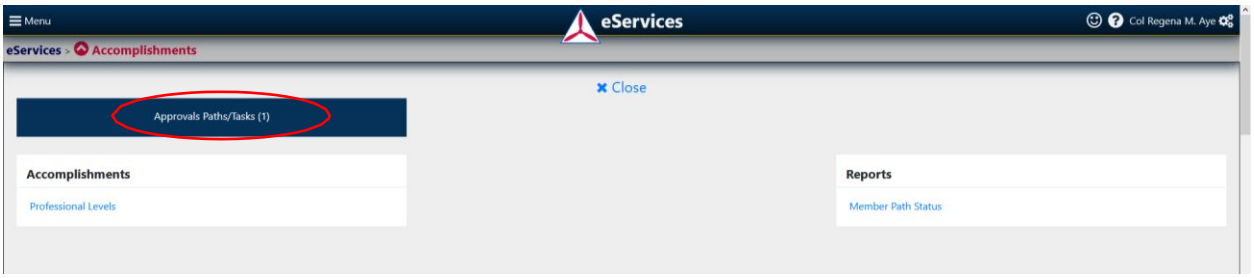

A green box will appear in the top right corner indicating Credit Approved.



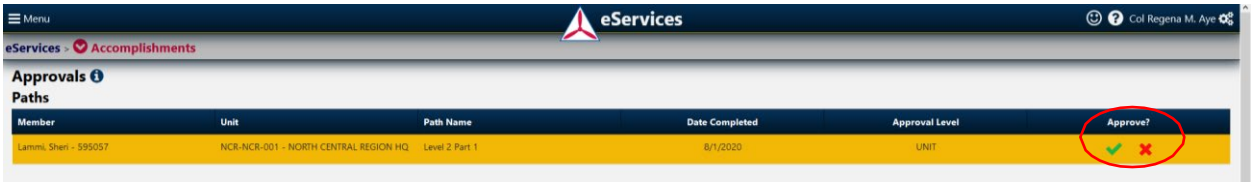

Once an item is approved, the blue bar turns green on the member's **Accomplishments** page.

## As a validator or 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.

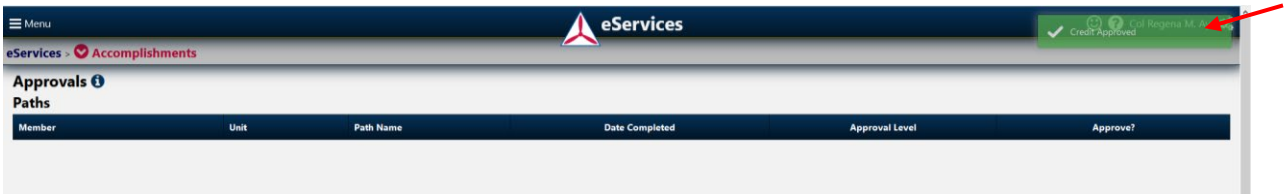



1. Click the blue **Approvals Paths/Tasks** button to see what tasks or paths are pending approval.

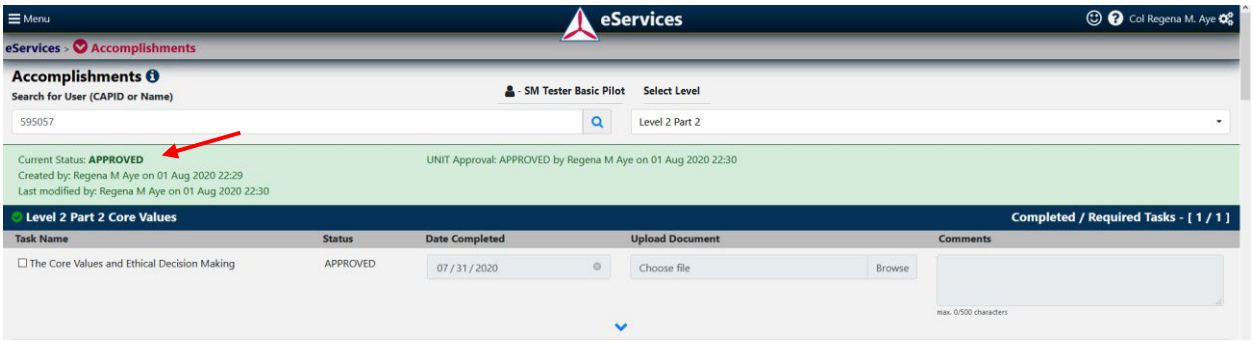



2. Choose the **green Check Mark** to approve and the **red X** to disapprove a path or task.

3. Click the **Approve** button.




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

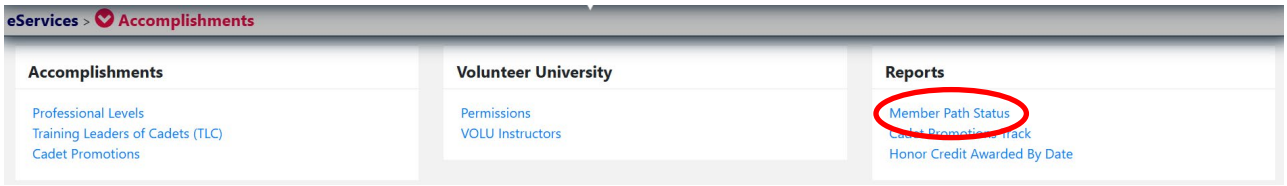



If you are the final approving authority the blue bar will turn green, the member will see credit in eServices, and the member will be able to start the next level of training.

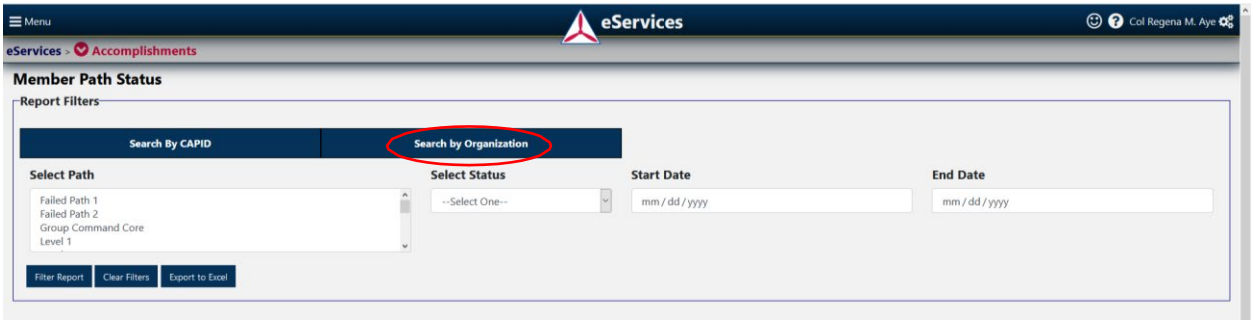
If you are not the final approving authority, the request will escalate in the system until all required approvals have been obtained.

## How do I use the Member Path Status Report to find out what members in a unit need to complete or have completed?

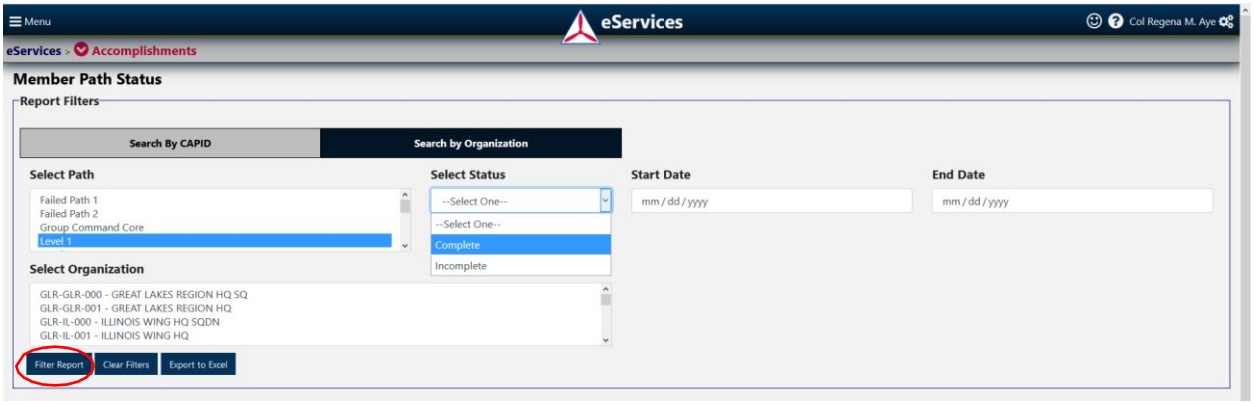
Member Path Status is a report used to determine what a member or a series of members or a unit has complete or incomplete for a Path (Level) in the Senior Member Education and Training Program. Education and Training personnel at all levels, leaders, and mentors can use this tool to plan training or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



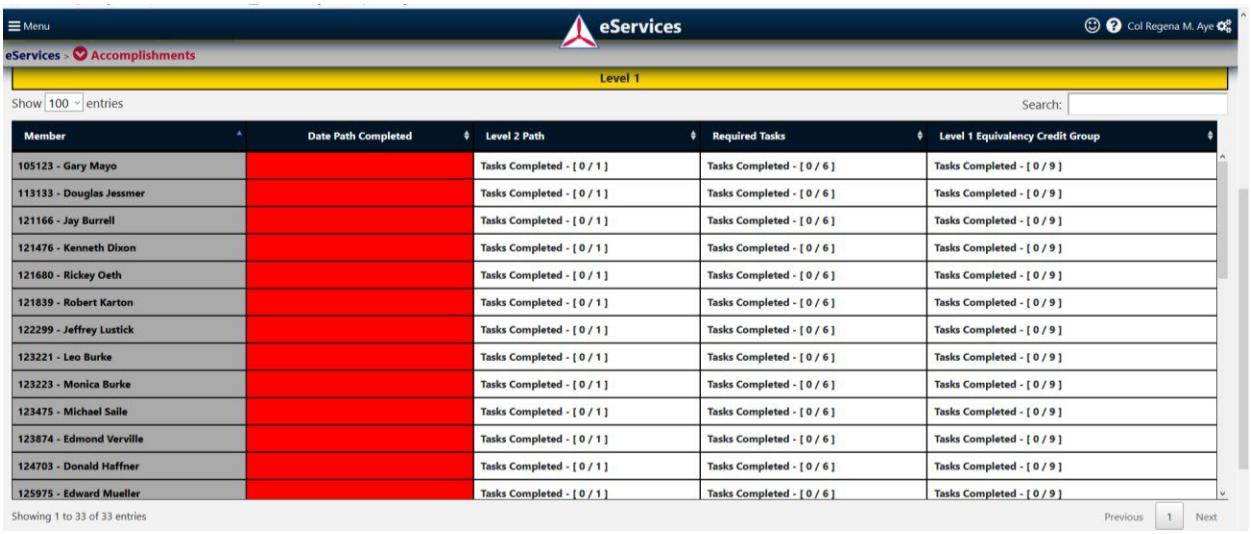

1. Click the **Member Path Status** link in the **Reports** box.



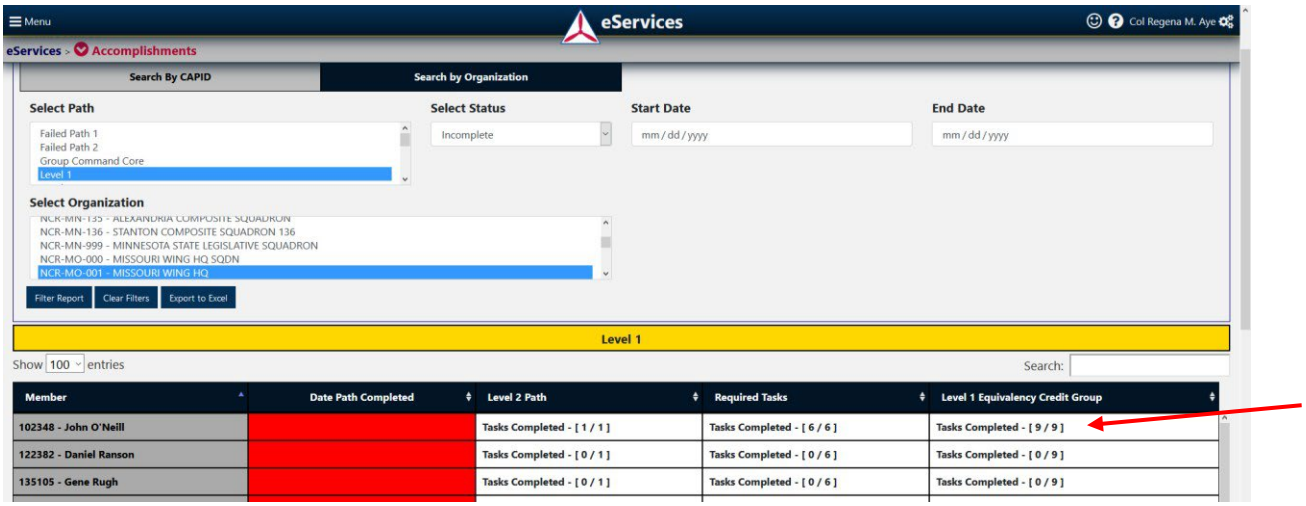

2. Click the **Search by Organization** button.



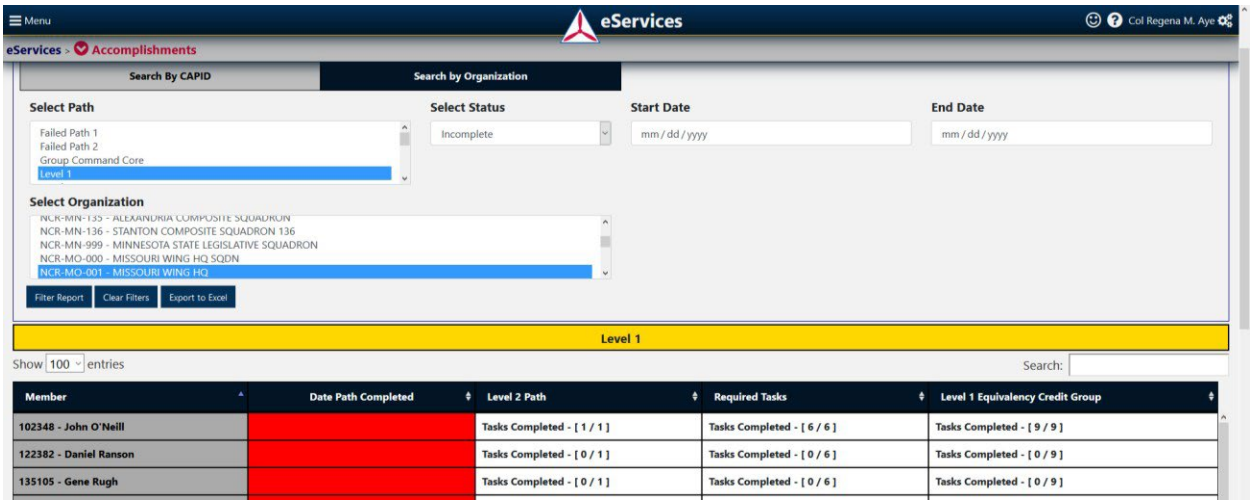

3. Select a Level from the ***Select Path*** drop-down menu.
4. Select Complete or Incomplete from the ***Select Status*** drop-down menu.
5. Select a unit from the ***Select Organization*** drop-down menu.
6. Click the **Filter Report** button.



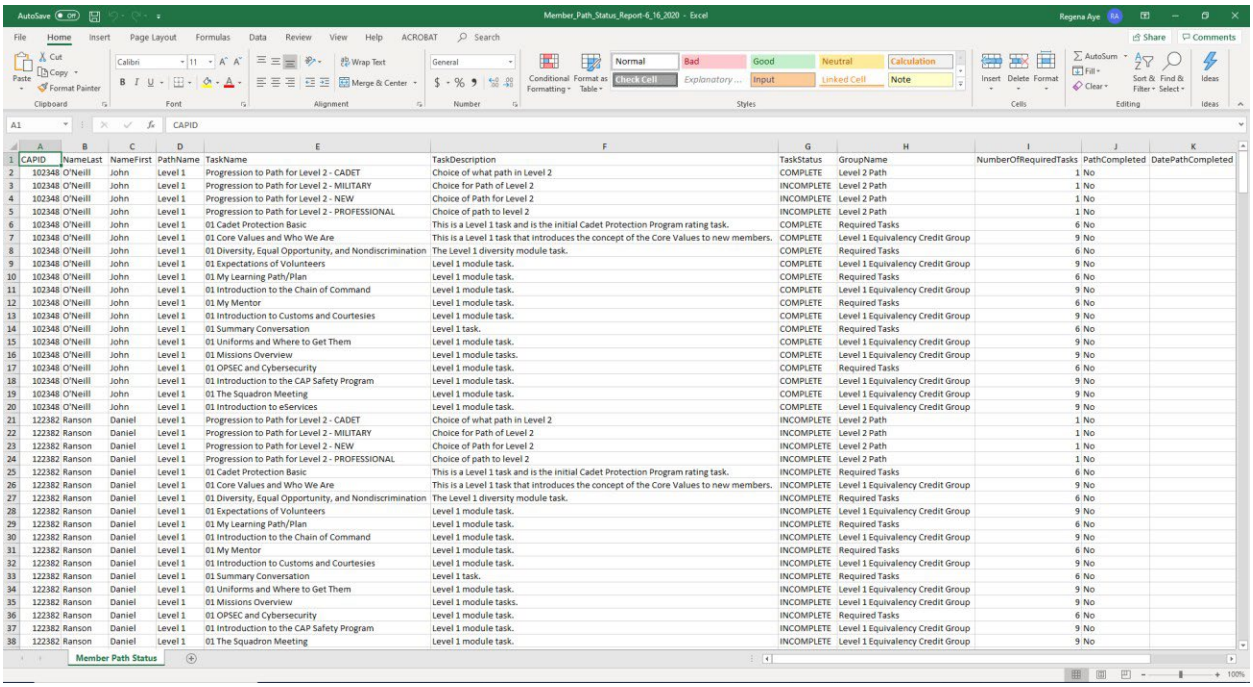

The report generated by the tool shows all members in the unit who have not completed the path (level). For each grouping of tasks, one can see how many are completed. This information can be used to plan which groupings of modules should be offered for the selected unit.




In this screenshot, the first member has some tasks completed and the other members do not.



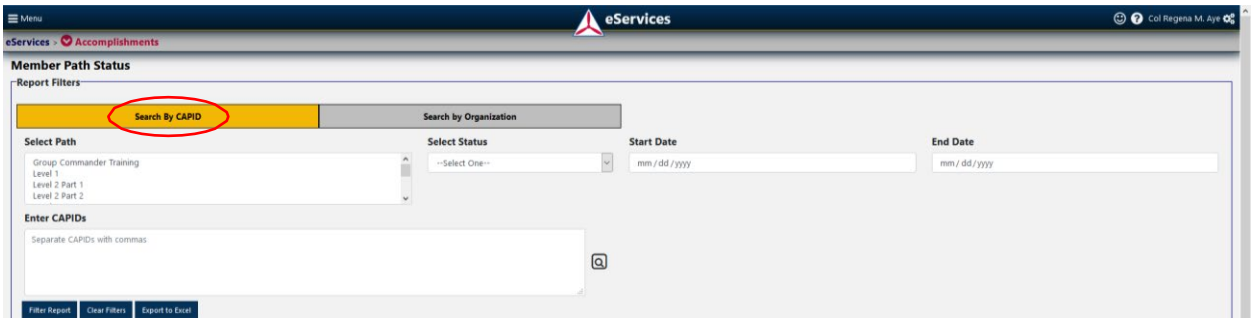

If more detail is desired, click the **Export to Excel** button.



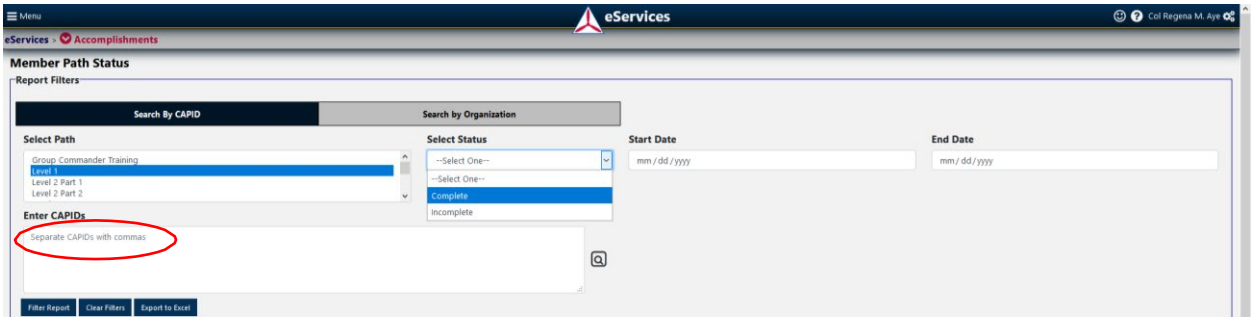

| CAPID | NameLast | NameFirst | PathName | TaskName | TaskDescription | TaskStatus | GroupName | NumberOfRequiredTasks | PathCompleted | DatePathCompleted |
|---|---|---|---|---|---|---|---|---|---|---|
| 102348 | O'Neill | John | Level 1 | Progression to Path for Level 2 - CADET | Choice of what path in Level 2 | COMPLETE | Level 2 Path | 1 | No | |
| 102348 | O'Neill | John | Level 1 | Progression to Path for Level 2 - MILITARY | Choice for Path of Level 2 | INCOMPLETE | Level 2 Path | 1 | No | |
| 102348 | O'Neill | John | Level 1 | Progression to Path for Level 2 - NEW | Choice of Path for Level 2 | INCOMPLETE | Level 2 Path | 1 | No | |
| 102348 | O'Neill | John | Level 1 | Progression to Path for Level 2 - PROFESSIONAL | Choice of path to level 2 | INCOMPLETE | Level 2 Path | 1 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Cadet Protection Basic | This is a Level 1 task and is the initial Cadet Protection Program rating task. | COMPLETE | Required Tasks | 6 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Core Values and Who We Are | This is a Level 1 task that introduces the concept of the Core Values to new members. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Diversity, Equal Opportunity, and Nondiscrimination | The Level 1 diversity module task. | COMPLETE | Required Tasks | 6 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Expectations of Volunteers | Level 1 module task. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 My Learning Path/Plan | Level 1 module task. | COMPLETE | Required Tasks | 6 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Introduction to the Chain of Command | Level 1 module task. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 My Mentor | Level 1 module task. | COMPLETE | Required Tasks | 6 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Introduction to Customs and Courtesies | Level 1 module task. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Summary Conversation | Level 1 task. | COMPLETE | Required Tasks | 6 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Uniforms and Where to Get Them | Level 1 module task. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Missions Overview | Level 1 module tasks. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 OPSEC and Cybersecurity | Level 1 module task. | COMPLETE | Required Tasks | 6 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Introduction to the CAP Safety Program | Level 1 module task. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 The Squadron Meeting | Level 1 module task. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 102348 | O'Neill | John | Level 1 | 01 Introduction to eServices | Level 1 module task. | COMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | Progression to Path for Level 2 - CADET | Choice of what path in Level 2 | INCOMPLETE | Level 2 Path | 1 | No | |
| 122382 | Ranson | Daniel | Level 1 | Progression to Path for Level 2 - MILITARY | Choice for Path of Level 2 | INCOMPLETE | Level 2 Path | 1 | No | |
| 122382 | Ranson | Daniel | Level 1 | Progression to Path for Level 2 - NEW | Choice of Path for Level 2 | INCOMPLETE | Level 2 Path | 1 | No | |
| 122382 | Ranson | Daniel | Level 1 | Progression to Path for Level 2 - PROFESSIONAL | Choice of path to level 2 | INCOMPLETE | Level 2 Path | 1 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Cadet Protection Basic | This is a Level 1 task and is the initial Cadet Protection Program rating task. | INCOMPLETE | Required Tasks | 6 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Core Values and Who We Are | This is a Level 1 task that introduces the concept of the Core Values to new members. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Diversity, Equal Opportunity, and Nondiscrimination | The Level 1 diversity module task. | INCOMPLETE | Required Tasks | 6 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Expectations of Volunteers | Level 1 module task. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 My Learning Path/Plan | Level 1 module task. | INCOMPLETE | Required Tasks | 6 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Introduction to the Chain of Command | Level 1 module task. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 My Mentor | Level 1 module task. | INCOMPLETE | Required Tasks | 6 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Introduction to Customs and Courtesies | Level 1 module task. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Summary Conversation | Level 1 task. | INCOMPLETE | Required Tasks | 6 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Uniforms and Where to Get Them | Level 1 module task. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Missions Overview | Level 1 module tasks. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 OPSEC and Cybersecurity | Level 1 module task. | INCOMPLETE | Required Tasks | 6 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 Introduction to the CAP Safety Program | Level 1 module task. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |
| 122382 | Ranson | Daniel | Level 1 | 01 The Squadron Meeting | Level 1 module task. | INCOMPLETE | Level 1 Equivalency Credit Group | 9 | No | |

In the Excel export, we can see the break down by module of the training these members need.

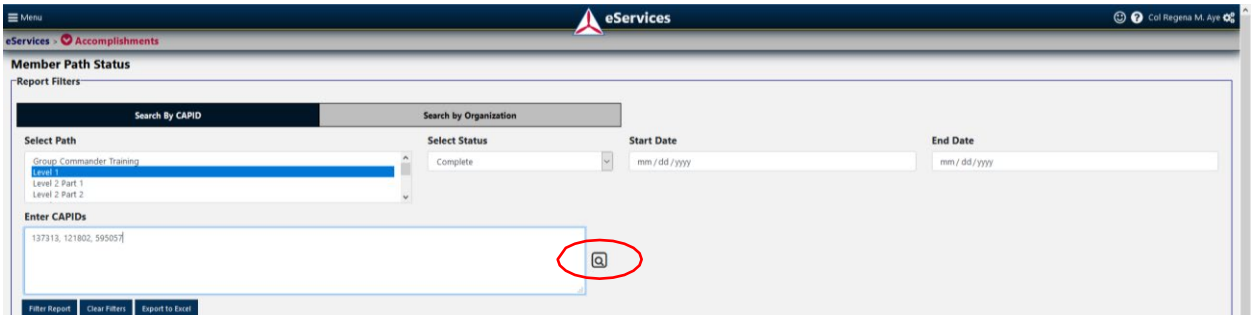
## How do I use the Member Path Status Report with a series of CAPIDs to find out what members need to complete or have completed?



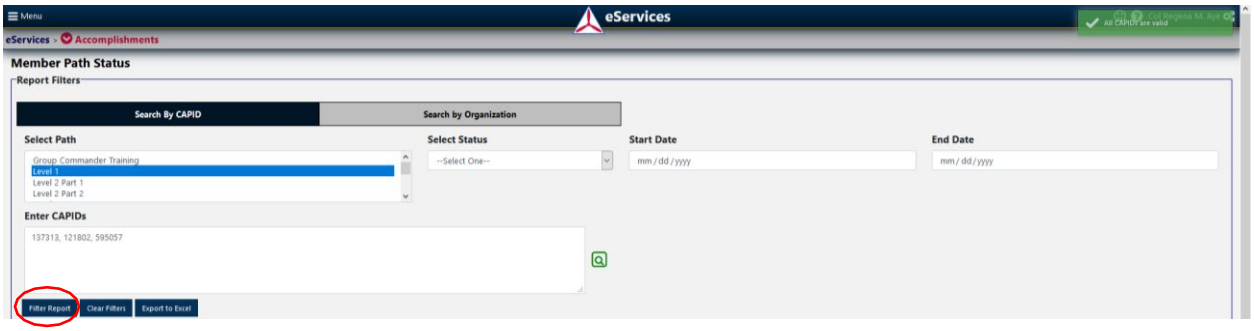

1. Click the **Search By CAPID** button.



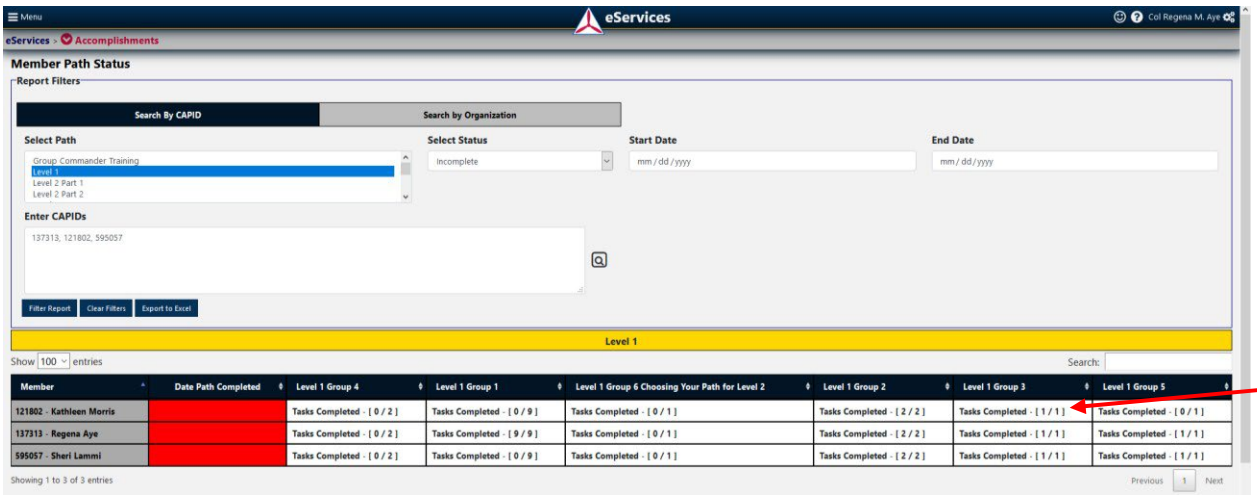

2. Select a level from the ***Select Path*** drop-down menu.
3. Select Complete or Incomplete from the ***Select Status*** drop-down menu.
4. Enter a series of ID numbers in the **Enter CAPIDs** box. Separate the IDs with commas.




5. Click the **Magnifying Glass** to ensure all the IDs you entered are valid.

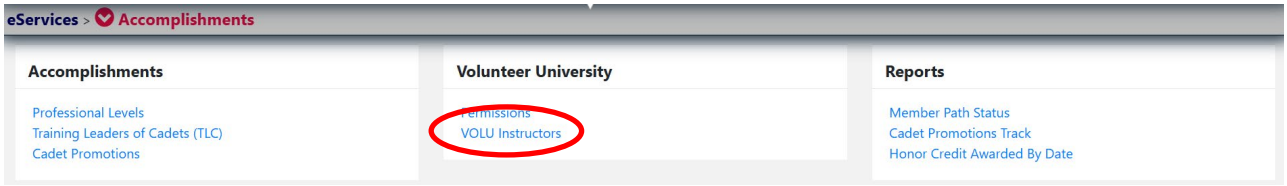



6. The Magnifying Glass will turn green and a message in the upper right corner will confirm that all IDs are valid.
7. Click the **Filter Report** button.

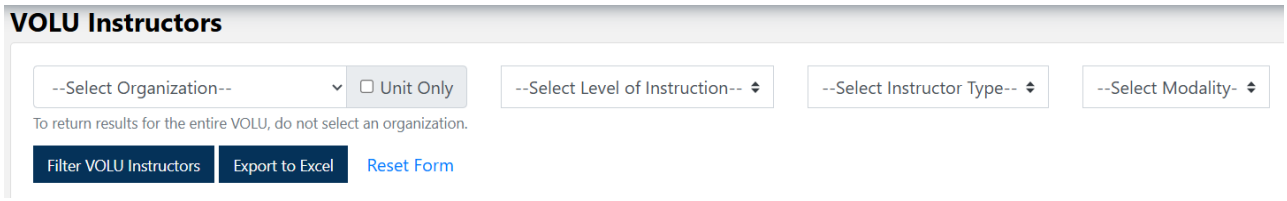



We can now see what these members need to complete for the level we selected.

## How do I find an instructor or list of instructors?




1. Click the **VOLU Instructors** link in the **Volunteer University** box.




2. Select the filter(s) that apply:
    - Organization: select unit or headquarters. For headquarters, if you only want personnel assigned to that headquarters, check the Unit Only box. If you want to include all personnel in the subordinate units, leave the box unchecked. If you want to search across all of CAP, leave Organization blank.
    - Select the Level(s) or Elective(s) of instruction. Leaving it blank will not return data.
    - Select Instructor to filter for those who are authorized to teach independently and post credit.
    - Select FaceToFace for in-person instructors (including virtual). Online instructors are only those who grade in Absorb.
3. Filter VOLU Instructors will display the results on screen. Export to Excel will create an Excel spreadsheet with the data.