

SMART User's Guide for Version 7.0

**U.S. Department of Energy
Office of Environment, Safety and Health**

**Office of Technical Training and
Professional Development (EH TTPD)**

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Welcome to SMART!

SMART, or System Management for Annual Requested Training, is a program that allows you to create/update your Individual Development Plan and identify training needed to accomplish your plan. If you are in the Technical Qualification Program (TQP), SMART allows you to create/update your current Technical Qualification Record (TQR).

This SMART User's Guide is designed to take you step by step through the SMART program. Illustrated with the screens you will encounter during the program, this Guide will help you complete each step of the program easily and quickly. When using SMART for the first time, be sure to read through each section of the SMART User's Guide before performing the steps—having the “big picture” first will save you time.

The SMART program runs on personal computers equipped with Windows software. **You must be able to use a mouse and have the “point and click” skills used in Windows type applications.** If you do not have these skills, you will need to learn how to use the mouse to “point and click” before you can access the SMART program.

Be sure to read through each page in the guide before performing the actions shown. Actions are in **boldface**; explanatory notes and tips are not. The symbol  indicates a special warning that you should read.

A context sensitive help feature is built into the system and can be accessed from the drop down menu. The help menu may also be accessed by pressing your F1 key just as in the Normal Windows environment.

If you need assistance, contact your Training Coordinator or call the SMART assistance line: 301-903-6332.

Now, turn the page and let's get started!

Initiating the SMART Program

The SMART program is accessed from the EH LAN Main Menu.

From the Main Menu, click on Administrative Systems.

Click on SMART to begin the SMART program.



Welcome to SMART!
Enter the first letter of your first name:
Enter the first letter of your last name:
Enter the last four digits of your SSN:
Waiting For Entry

This is the first data entry screen in the SMART program.

Type the first letter of your first name as it appears on your DOE personnel record.

Type the first letter of your last name as it appears on your DOE personnel record.

Type the last 4 digits of your social security number (SSN).

Click on .

Tip: There is no need to position the cursor using the mouse; the program does that automatically on this screen.

This message appears if you enter the information incorrectly, if a match cannot be found, or if your machine has been used by someone else accessing SMART.



Message
User ID in local record does not match.
Please try again.

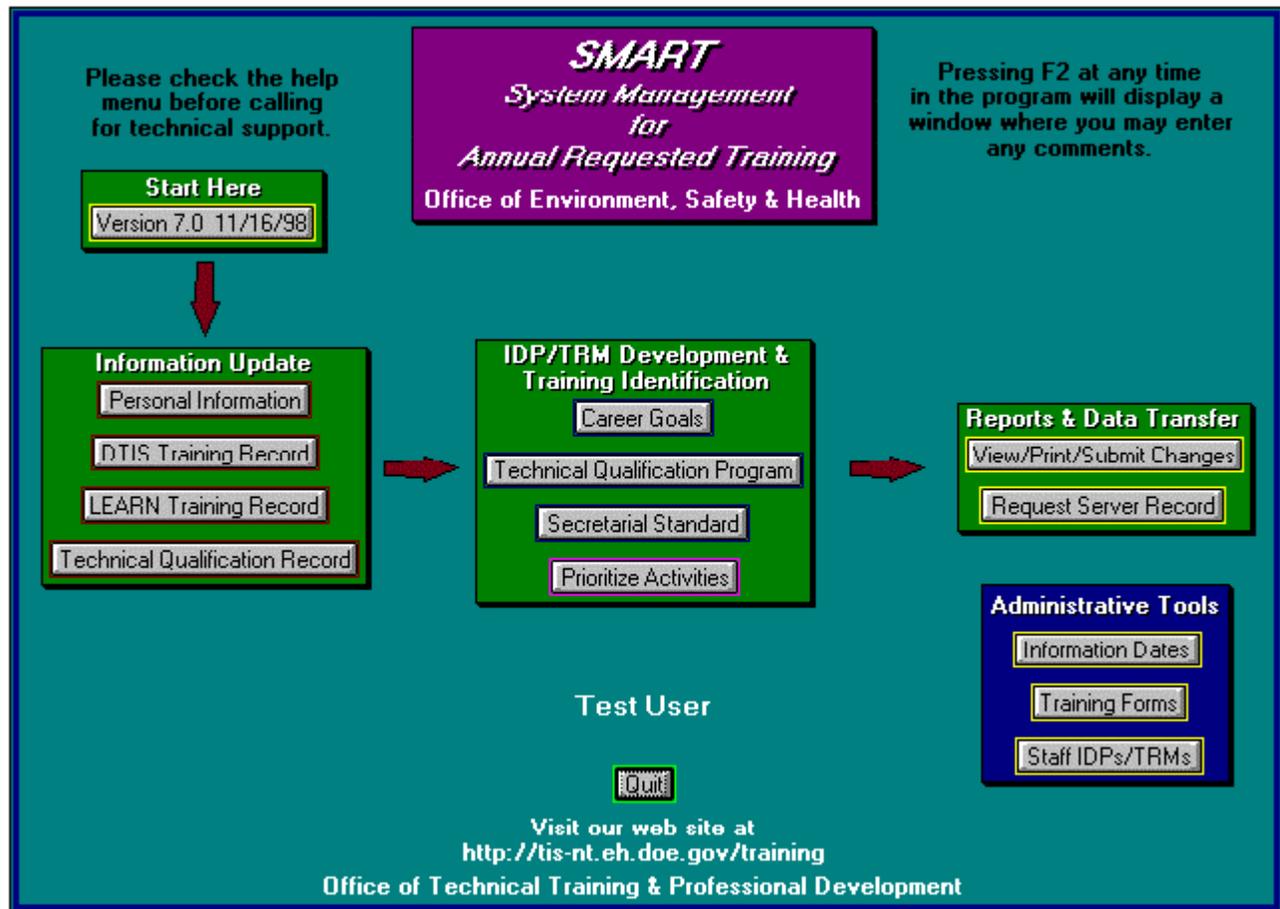
Click on .

Verify your data. Make sure you are using the initial of your first name that is on your DOE personnel record, not a nickname, middle name, etc.

Enter the information again.

Click on **Continue**. (If you still get the error message, call 301-903-6332 or 301-903-6482 for assistance.)

The main menu should display on your screen.



After you enter your social security number, the data on your local record will be checked against the server. If it is over 14 days old, you will be reminded to update your local record.



If you have made changes in the last 10 days, but not sent them, do not update your local record. Updating your local record will cause your changes to be eliminated. Send your changes before updating your local record. (See p. 36, "View/Print/Submit Changes.")

If your data is over 30 days old, the system will request your record automatically.

Click on .

Next, the "Data Files" screen will be displayed.



This screen provides status information as well as dates on your files.

It also indicates whether or not the application is ready for you to work on your records. Please see p. 50, "Using Information Dates," for details.

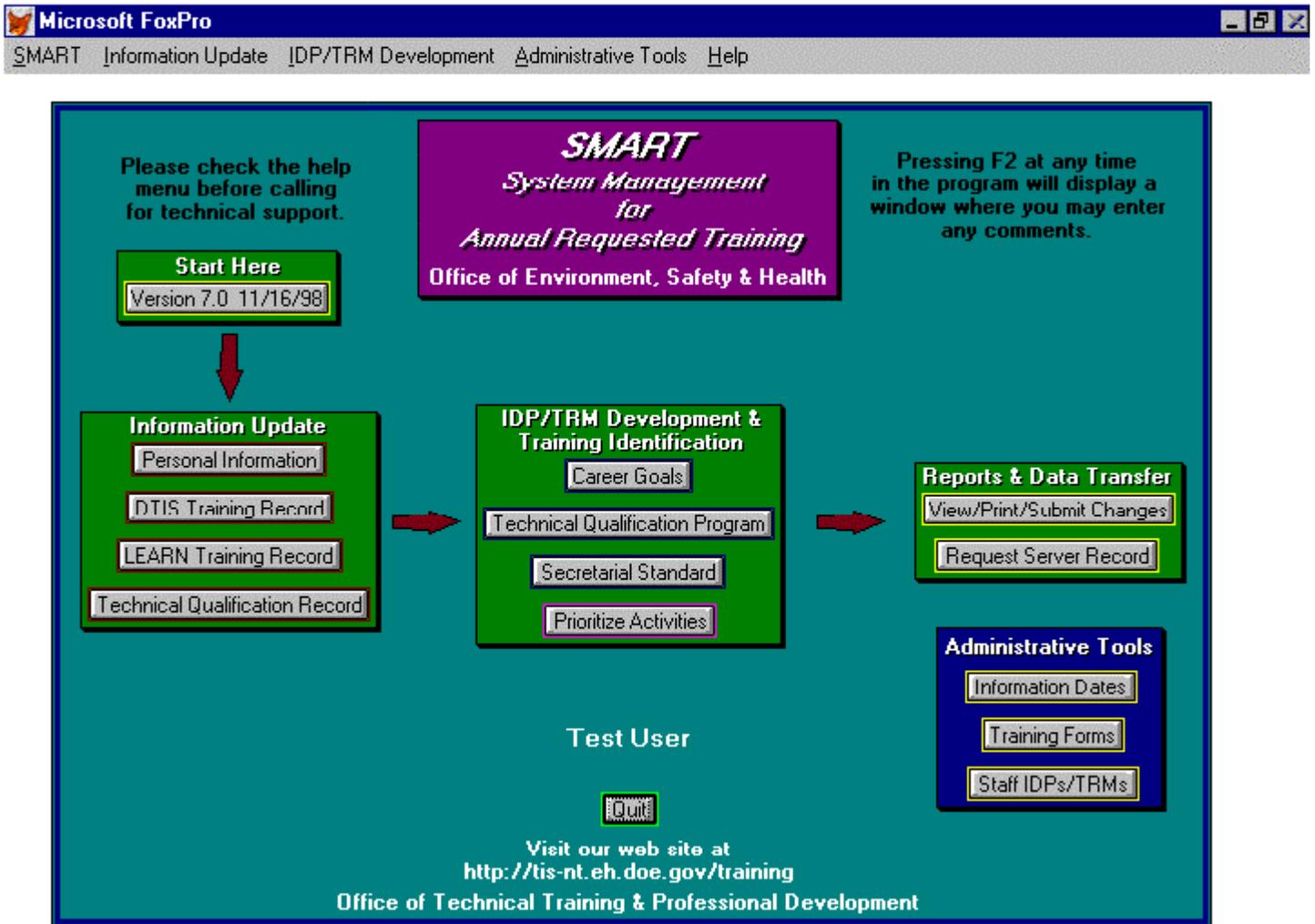
Tip: If you have difficulty accessing SMART, please call the SMART assistance line: 301-903-6332.

Click on  when you are finished viewing this screen.

The main menu should display on your screen.

Getting the BIG Picture

This is the Main Menu for SMART.



Clicking on any of the buttons on the screen will take you to a different step in the SMART program.

Tip: You may press F2 while viewing any screen and a dialog box will appear in which you may enter comments or other relevant information, such as corrections to displayed information.



SMART uses drop down menus to allow you access to its many features. Take a moment to click on each menu to see what's under each. Most of SMART's features can be accessed either through the drop down menus or "buttons" on the screens.

A few functions, such as "Copy Text" and "Paste Text" can only be done from the SMART drop down menus. Refer to the Table of Contents on page i for other features.

If you are using SMART for the first time, you should progress through the program in this order:



Once you are familiar with SMART, you will be able to use all of its functions as you need them. However, it is still a good idea to check the **Version 7.0 11/16/98** button to be sure you stay current.

Tip: Double-clicking on **Quit** on the Main Menu allows you to exit SMART at any time without losing your work.

What's New with SMART

Click on  .

A “What's New” dialogue box will appear.

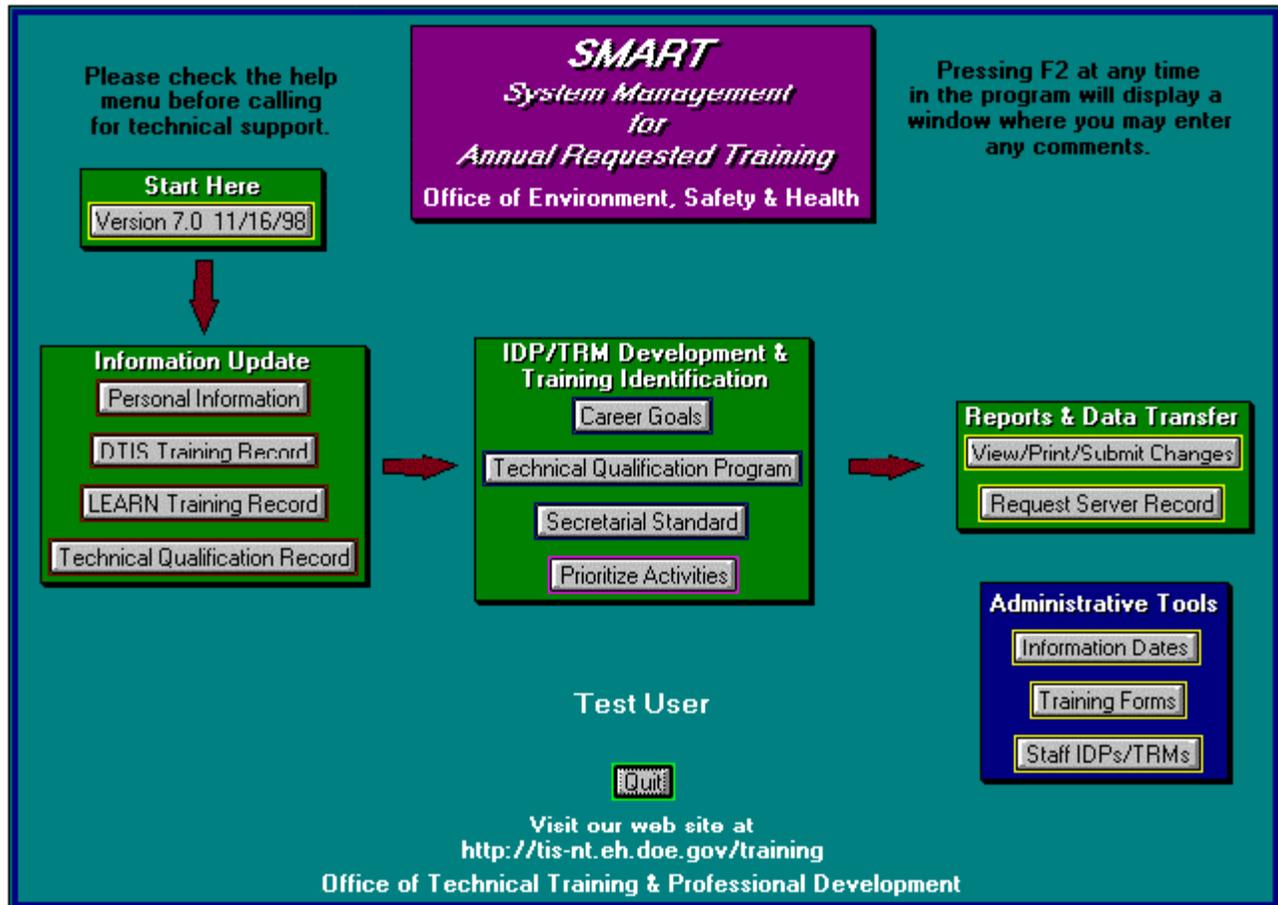
Read through the information to find out the new features of the SMART program.



When you are finished, click on  .

Verifying Your Personal Information

This is the SMART Main Menu.



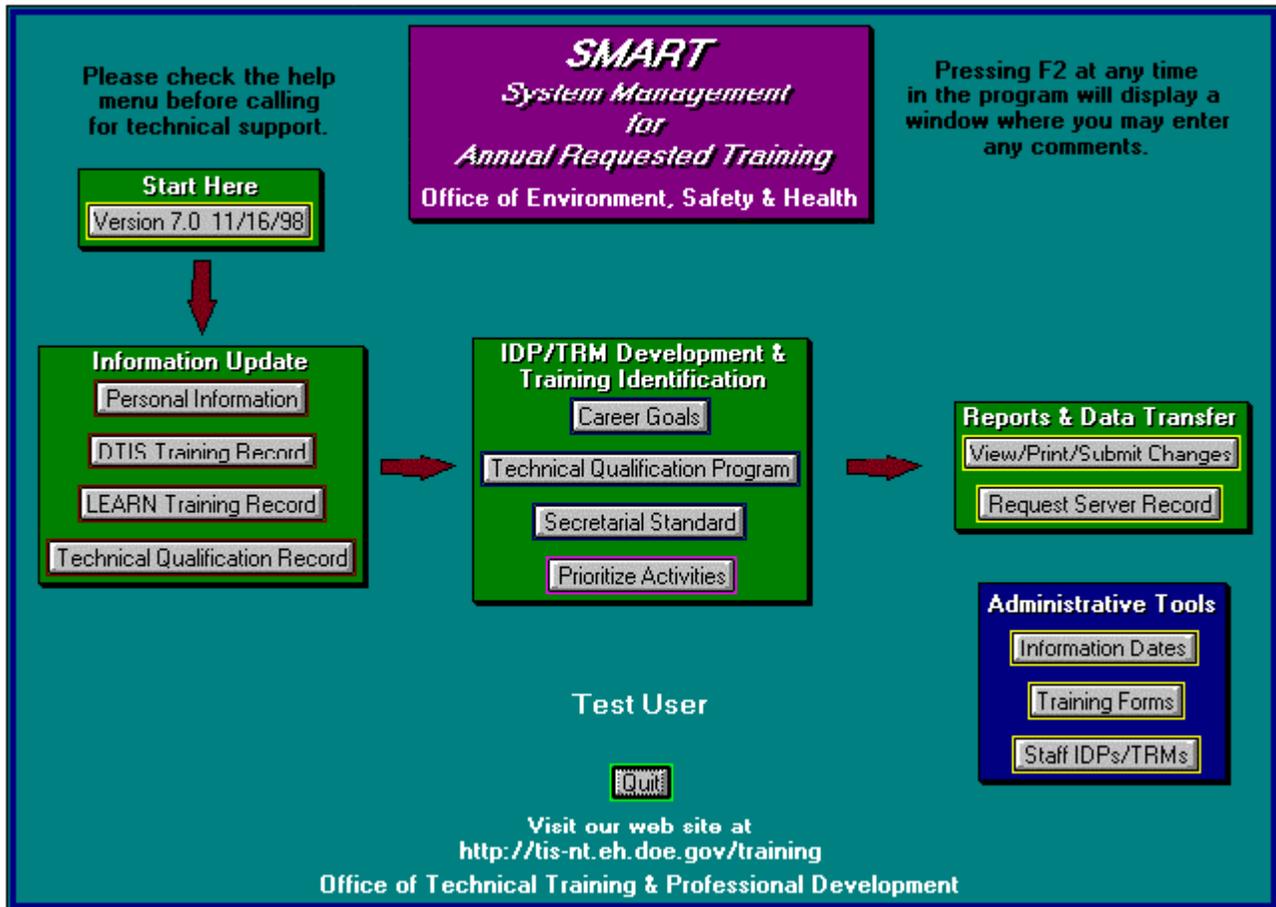
You have completed the first step in the SMART program, checking out the latest SMART features.

Go to the **Information Update** section and click on **Personal Information** to verify your personal data.

Tip: Remember, if you need to take a break, you may click **Quit** on the Main Menu without losing any of your work.

Checking Your DTIS Training Record

This is SMART's Main Menu.



EH TTPD maintains two training databases: DTIS and LEARN.

Click on **DTIS Training Record** to check your activities listed in the DTIS database.

For current EH employees, the DTIS Record contains your training history up to April 1996; your training history after that date is contained in your LEARN Training Record (page 13). If you are new to EH, all of your training history will be contained in LEARN. (See “Reviewing Your LEARN

<i>DTIS Training Record</i>			
Code	Activity	Date	Hours
<input type="button" value="EX00087"/>	PROJECT PLANNING AND ORGANIZATION	05/02/91	8.0 Hrs
<input type="button" value="EH00000000"/>	VMS SYSTEM SECURITY FEATURES	06/03/91	24.0 Hrs
<input type="button" value="EH00117"/>	COMPUTER VIRUSES	06/12/91	16.0 Hrs
<input type="button" value="92EH00176"/>	ADMINISTRATION FOR NETWARE	02/10/92	48.0 Hrs
<input type="button" value="92EH00181"/>	NETWARE SECURITY	03/23/92	32.0 Hrs
<input type="button" value="ITS-III"/>	AUTOMATED INFORMATION	11/17/92	24.0 Hrs
<input type="button" value="SE-IPT-1"/>	INSPECTION TRAINING PROCESS	12/14/92	26.0 Hrs

17 Activities
Page 1 of 3

Check the information on the screen.

Tip: Your DTIS record in SMART runs only to April 1996. If your DTIS record does not look complete, contact the EH Training Registration Center for the latest version of your DTIS record.

Clicking on the code buttons will display additional information about each activity. Click on when you are finished.

Click on to print a copy of your DTIS Training Record.

When you are ready to exit your DTIS Record, click on .

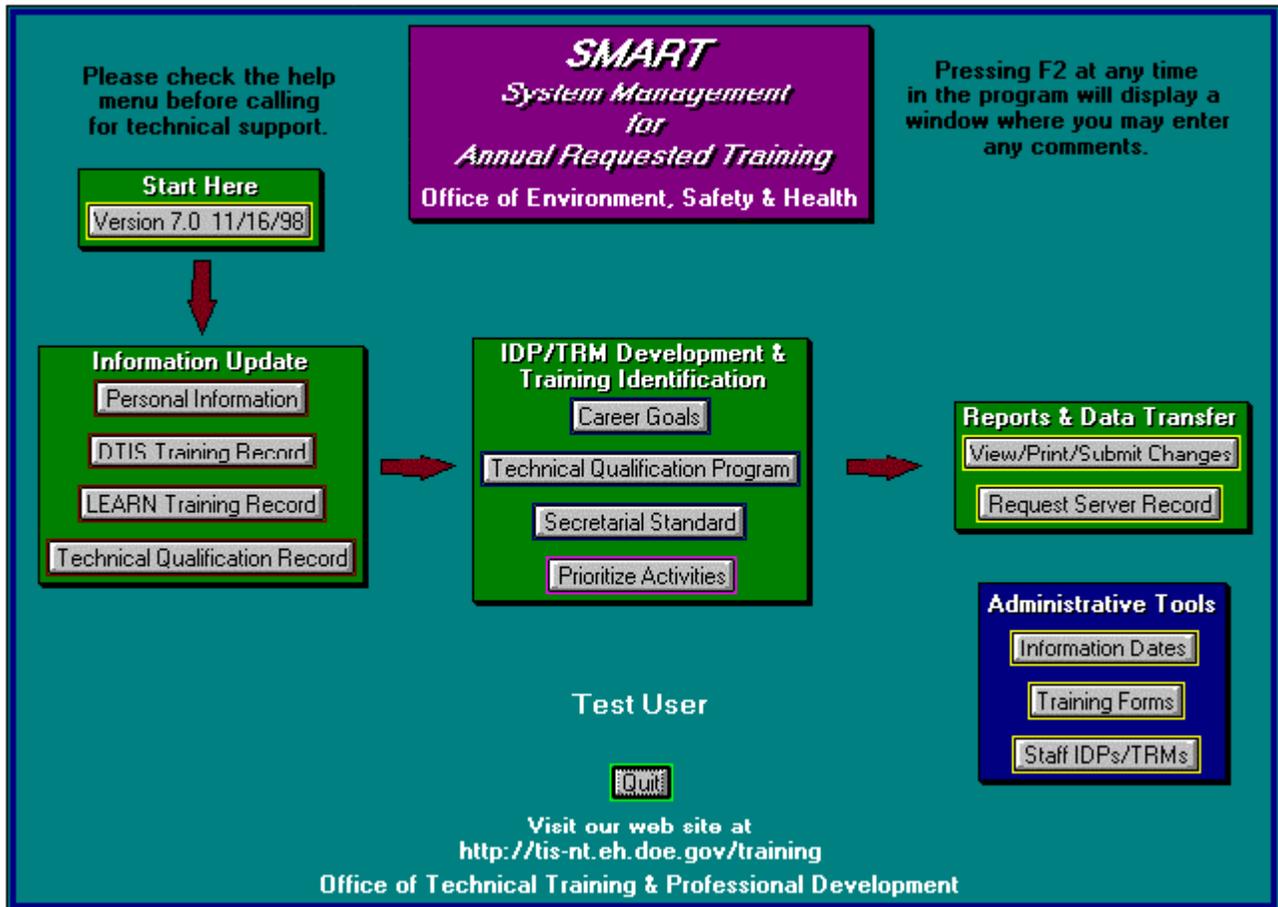
 (Before you leave the SMART program, be sure to export any changes so the server (master) record will be updated. See “View/Print/Submit Changes” on page 42.)

Tip: To move from page to page, click on the and buttons.

You have completed the third step in the SMART program, reviewing your DTIS Training Record.

Reviewing Your LEARN Training Record

This is SMART's Main Menu.



Now you are ready to review your LEARN Training Record. Your LEARN Training Record is your current training history, maintained by EH TTPD in the LEARN system.

Click on **LEARN Training Record** .

LEARN Training Record

Qual-Req't	Code	Activity	Targeted	Classification	Scheduled	Completed	Verified
<input type="radio"/>	ADM110 \$0	Cooperation / Problem Solving	16.0 Hrs 09/30/1999	Technical\Position Specific			<input type="checkbox"/> Remove
<input checked="" type="radio"/>	HAZ139 \$0	Electrical Standards	32.0 Hrs 06/28/1997	Technical\Position Specific			<input type="checkbox"/> Remove
<input type="radio"/>	TRG105 \$0	Instructional Analysis and Design (I/AD) Course	40.0 Hrs 03/03/1998	Technical\Position Specific			<input checked="" type="checkbox"/> Remove
<input type="radio"/>	MNT150 \$4900	1997 Executive Potential Program	320.0 Hrs 01/14/1998 03/09/1997	Technical\Position Specific			<input type="checkbox"/>
<input type="radio"/>	CST139 \$0	Troubleshooting Personal Computers	16.0 Hrs 09/30/1998	Technical\Position Specific			<input checked="" type="checkbox"/> Remove
<input type="radio"/>	MNT132 \$0	Building High Performing Teams	32.0 Hrs 09/30/1998	Technical\Position Specific			<input type="checkbox"/> Remove

21 Activities
 << Page 1 of 4 >>
 Main Menu

Review the information to ensure it is correct. You may make corrections to this information in three ways:

1. If an activity's classification code is incorrect, click on the down arrow or choose either Technical/Position Specific or Individual Development Plan, depending on your need.

Tip: You should always check to be sure an activity's classification code is correct for you—once you complete the activity, you cannot change the code.

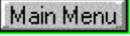
2. If you do not wish to complete the activity, you may delete it by placing a “✓” in the box labeled “Remove.” You may do this **only** if
 - the activity is **not** classified as Generic Fundamentals (i.e., mandatory training), OR
 - there is **no** scheduled or completed date.

If the course meets one of these criteria, a Remove box will be shown on the same line as the course. If not, no Remove box will be shown.

3. You may change the target date if there is no completion date. Place the cursor in the target date box and type over the old date.

Clicking on the activity code allows you to see a description of the activity if it is listed in the EH Course Catalog. You may print the activity description by clicking on  .

All these options may not be available to you (i.e., if the activity is completed, you cannot make any changes).

Click on  when you are finished.

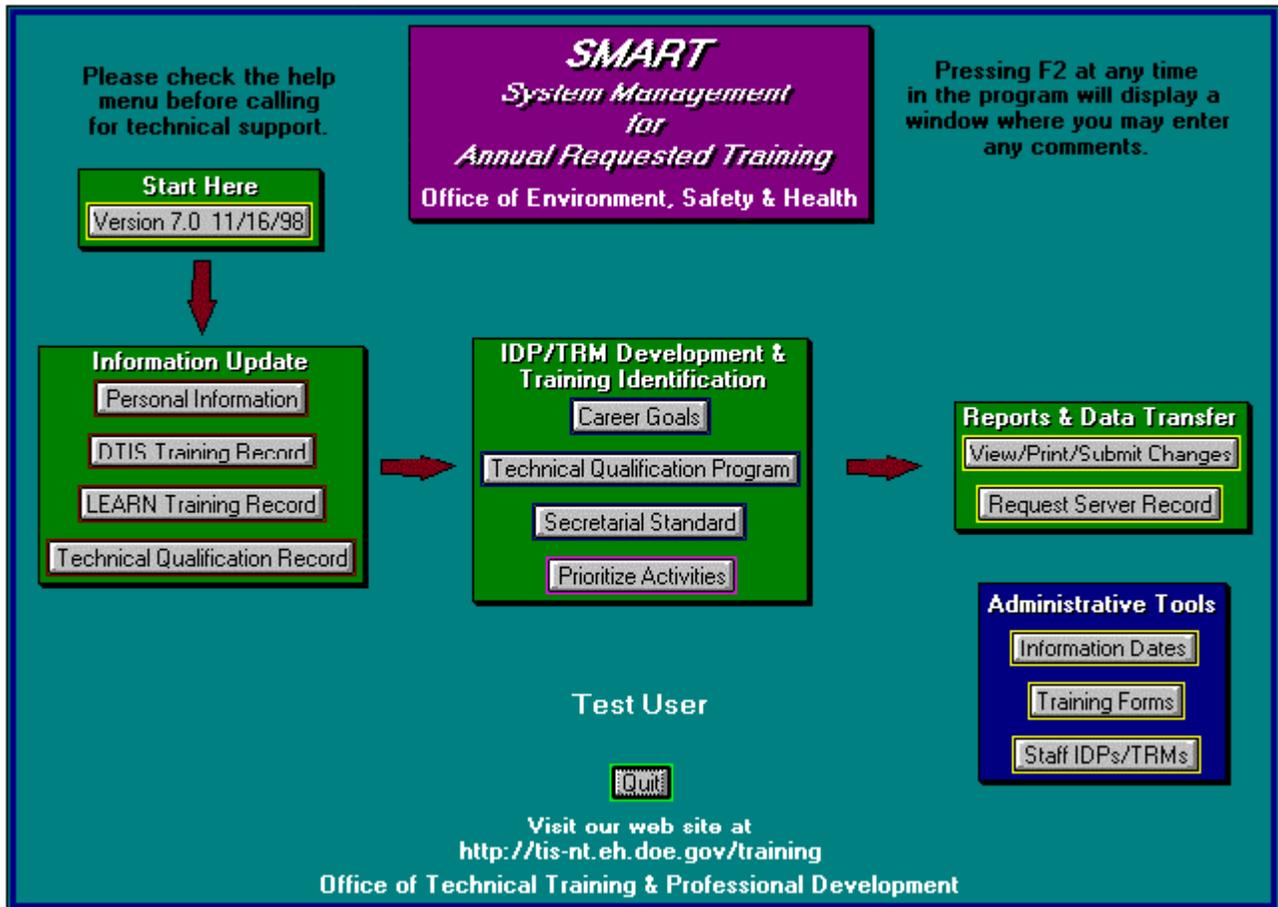


(Before you leave the SMART program, be sure to export any changes so the server (master) record will be updated. See “View/Print/Submit Changes” on page 42.)

You have now completed the third step in the SMART program, reviewing your LEARN Training Record.

Your Technical Qualification Record

This is SMART's Main Menu.



The next step is to establish or review your Technical Qualification Record, if you are in the Technical Qualification Program. **(If you are not, skip to the next section, IDP Development.)**

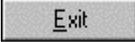
Click on **Technical Qualification Record** to establish or update your current TQR.

This screen can be used to 1) establish or 2) update your Technical Qualification Record (TQR). **If you are only updating your TQR, go to page 20.**

Establishing Your TQR

If you are newly entered into the Technical Qualification Program, or if your job has changed drastically, you will need to establish a baseline Technical Qualification Record (TQR). You must first work with your supervisor to determine your functional areas and required competencies, and then provide them to EH TTPD before you can use this screen to establish your baseline TQR.

Once this is done, you may use this screen to indicate how you will satisfy the competencies within your functional area(s). If you need to review a qualification standard, click on **Select Qualification Standard**. To review the supporting knowledge and skills, click on **Details**.

Use the **Help** feature as needed to assist you with completing this screen. Click on  when you are finished with **Help**.

The General Technical Base Qualification Standard is automatically listed as your first qualification standard for all EH employees in the Technical Qualification Program.

Read the Competency Statement. If you need to review the supporting knowledge and skills for this competency, click on . Click on  when you are finished.

Choices:

Select one method of meeting your competency requirements: **exemption, equivalency, or developmental activity**. Click on the appropriate selection box (if you choose the wrong box, simply click on it to deselect).

- If you are not required to satisfy the competency, click on the appropriate selection box under “I am exempted because:”.

OR

- If you have not satisfied the competency or if you have partially satisfied it from past experience, education, or learning activity, click on the appropriate selection box under “I need one, or more, developmental activities.” Enter past experience, education, or learning activity information into the Comment box.

Tip: If you are entering Justification/Comments that apply to several competencies, you may copy/paste text by using the “Copy Text” and “Paste Text” features found under the SMART on the menu bar.

OR

- If you have satisfied the competency, click on the appropriate selection box under “I have an

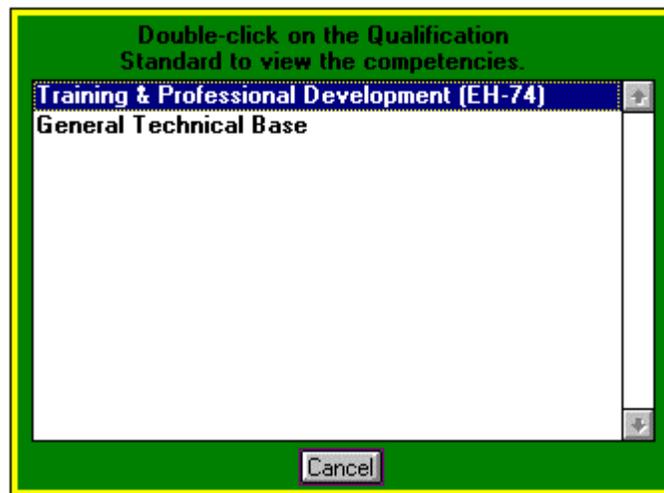
Tip: Do NOT choose a combination of methods, such as exemption and developmental activity or equivalency and exemption. If you do, a multiple status error will be generated on your Problem Report. (See example in the Appendix at the end of this Guide.)

Click on  and  to move back and forth through the competencies.

Clicking on  or  brings up either the first or the last competency statements for the qualification standard.

When you have completed all of the competencies, click on  to view your other functional areas.

A list of your functional areas is displayed.



Click and hold on the Up and Down arrows to scroll through the list.

Double click on the functional area you wish to select.

Repeat the procedure you followed for the General Technical Base Standard, choosing an exemption, equivalency, or method for satisfying each competency in your current functional area(s).

Click on  and  to move back and forth through the competencies.

Clicking on  or  brings up either the first or the last competency statement for the qualification standard.

Updating Your TQR

If you have already established your baseline TQR and only need to update it, you can only make changes to your outstanding activities as shown on the right side of the screen. (You will not have access to the left side of the screen.) Use the screen to enter any new information needed, such as Activities Completed date, Target Date, or Evaluated On date. You may also change your developmental activity choices or evaluation methods in consultation with your supervisor.



You must fill out each section on the screen as you complete a developmental activity—do not remove checks from the developmental activities after you have completed them.

If you have completed part of a competency's requirements, but not all, you should enter that fact in the comments box.

Clicking on **Select Qualification Standard** allows you to see a list of the standards that apply to your position. Double-clicking on a specific standard shows the competencies for that standard.

Tip: If you are entering Justification/Comments that apply to several competencies, you may copy/paste text by using the “Copy Text” and “Paste Text” features found under the SMART on the menu bar.

Click on the  and  buttons to move back and forth among the competencies.

Tip: If you know the number of the competency you want, click on the button that says Competency _____ of _____.



Enter the number of the desired competency and click  .

Clicking on **Completed Activities** shows your DTIS and LEARN training records for completed courses. If any courses you have completed are missing from the list, contact the EH Training Registration Center: 202-586-2499.

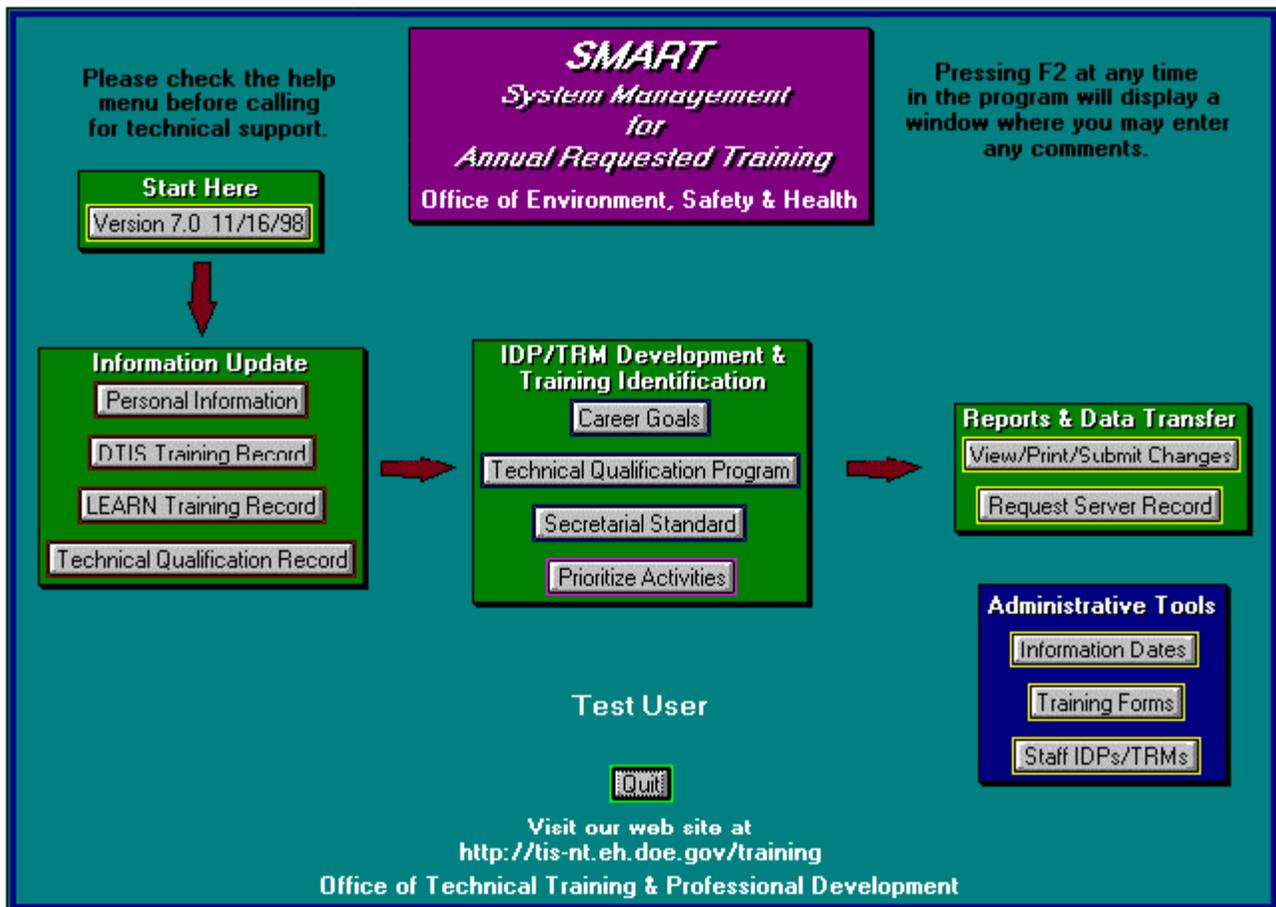
Click on **Main Menu** when you are finished.



(Before you leave the SMART program, be sure to export any changes so the server (master) record will be updated. See “View/Print/Submit Changes” on page 42.)

Entering Your Career Goals

This is SMART's Main Menu.



You have now completed the information update section of the SMART program.

Now you are ready to develop or modify your IDP. There are three steps:

- identification of career goals,
- selection of learning activities, and
- the prioritization of learning activities.

Click on **Career Goals** .

Creating Your IDP

You will see this screen only if you have never created an IDP using SMART. If you already have an IDP in SMART, turn to the next page.

Career Goals

Please enter your top three short range goals.

Goal 1: Improve computer skills.

Goal 2:

Goal 3:

Please enter your top two long range goals.

Goal 1: Improve management skills.

Goal 2:

Done

The purpose of this screen is to enter your career goals.

Use the drop down menu or press F1 for the Help screen to review examples or definitions of short and long term goals. When you are finished with Help, just exit.

Enter your short and long term goals. (Use the mouse or the keyboard to move from box to box.)

When you have finished entering your goals, click on **Done**.

You must enter a goal on this screen before you can select training activities.

Selecting Training to Achieve Your Goals

Career Goals
Short Range Goal 1 - Improve computer skills.

<< Show All Goals >>

Primary Word: Search Descriptions Also
Secondary Word:

Outstanding Activities Position Courses Find Matches Course Classification

2 Hit(s)
Page 1 of 1

Show Selected Pick A Target Date To Select

* - Schedule available	* CST101	Introduction to the Internet	4.0 Hrs	\$0	DOE/IM Information Management	09/30/1998
	CST103	TRAVEL MANAGER PLUS 4.0+ FOR DOS	6.0 Hrs	\$0	DOE/IM Information Management Training Center	09/30/2000

Non-Catalog Courses/Workshops/Seminars

Main Menu

You must enter a target date for completion. Consult the Help menu to review more information on how to complete this screen. When you are finished with Help, exit the program.

After you have entered your goals, you must select a learning activity to help you fulfill your goals.

You may identify a formal training course.

Turn the page to see how to identify a course.

OR

You may choose a non-catalog learning activity such as:

- College/University
- Conference/Workshop
- Mentoring
- On-the-Job Training (OJT)
- Other
- Self-Study
- Site Specific
- Training Course

Click on **Non-Catalog Courses/Workshops/Seminars** and turn to page 26.

To find training courses to help you achieve your first goal, you may click on:

Course Classification

OR

Find Matches

OR

Position Courses

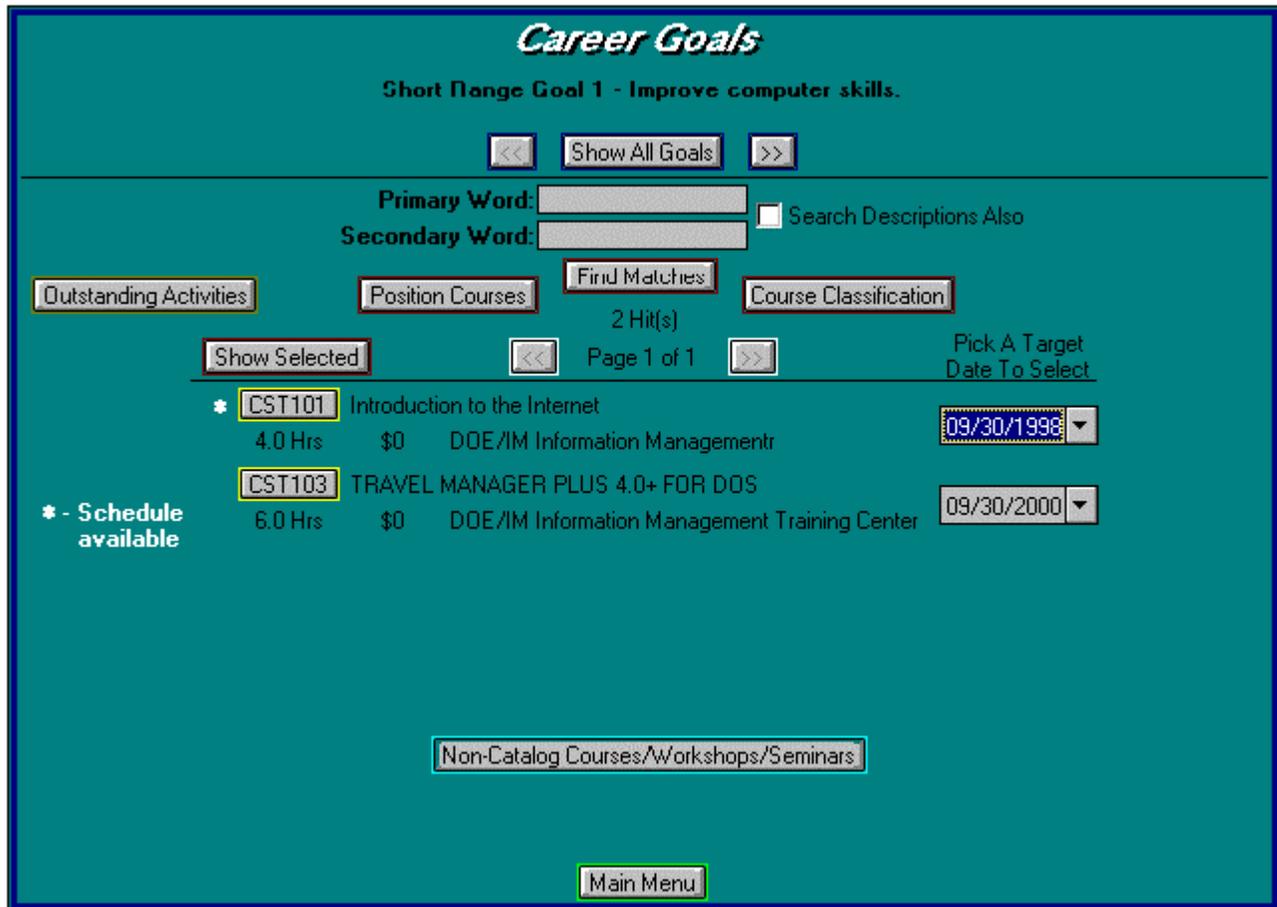
Review the list of course classification codes displayed.	Enter a primary search word in the Primary: <input type="text"/> If you wish to narrow your search, you may enter a secondary word in the Secondary: <input type="text"/>	Review the list of job positions displayed.
Click and hold on the Up and Down arrows to scroll through the list.	Click on Search Descriptions also if you wish to search course descriptions, too.	Click and hold on the Up and Down arrows to scroll through the list.
Double-click on any course classification code to display the set of courses in that category.	After entering your search words, click on Find Matches .	Double-click on any job position to display set of courses matched to that position.
Click on course classification code to see course description. Click on Done when you are finished viewing the course description.	All matches will be displayed. Click on course classification code to see course description. (In the example shown, all courses on safety are being requested.) Click on Done when you are finished viewing the course description.	Double-click on any course classification code to see a course description. Click on Done when you are finished viewing the course description.

Select a target date from 1 of the 4 dates listed for each course you wish to enter into your IDP. If you do not wish to select a course, leave the target date as “No Date.” If you enter a target date, SMART will immediately give you the option of completing a pre-filled training request (if there is a “Schedule Available”).

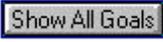
After you have selected all your courses for that goal, you may click on **Show Selected** to display all the courses you have chosen.

Click on **>>** to the right of **Show All Goals** and repeat this procedure for all goals until you have identified all the training courses needed.

When you have identified courses for other learning activities for all your goals, click on **Main Menu**.



Four buttons are used to move within this screen. To move from goal to goal, click on the  and  buttons on either side of . To move from page to page, click on the  and  on either side of “Page.”

To see all your goals, you may click on: .

Clicking on  shows you the courses you have scheduled, but not yet completed, and their target dates.

Non-Catalog Courses/Workshops/Seminars

If you know a SPECIFIC course/seminar AND vendor, fill in sections 1 and 3.
If not, enter information in sections 2 and 3.

Section 1

Course/Seminar #:

Title:

Vendor's name, address, and phone number:

Location of training site:

Training period
Start: / /

Complete: / /

Section 2

A detailed description will increase the chances of finding a suitable match.
Please be as specific as possible.

Description:

Section 3

Hours and costs should be approximated if unknown.

Cost: Hours: Target Date:

Activity Type:

Classification:

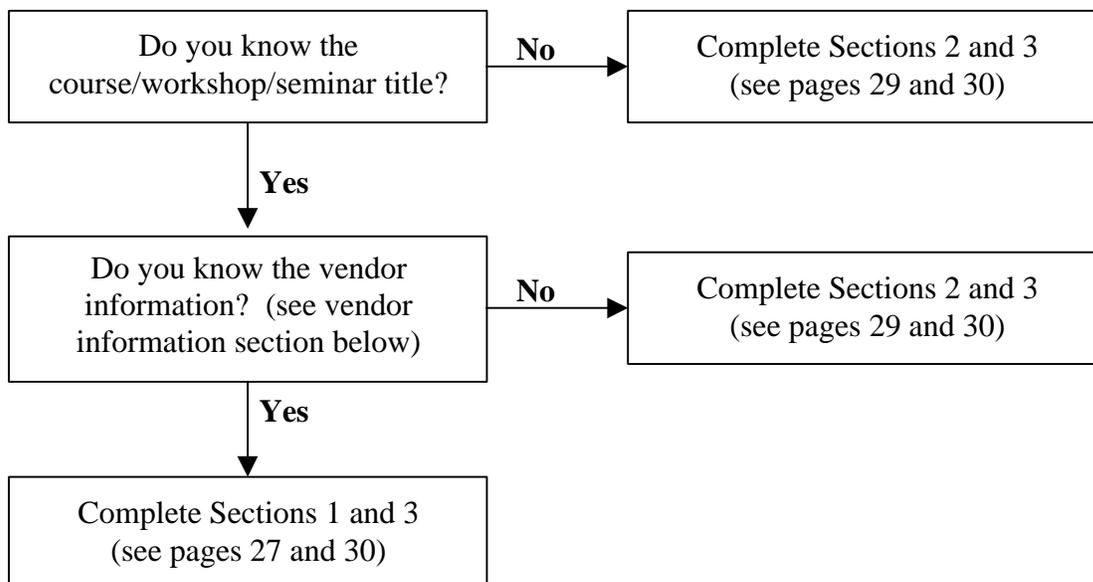
This screen allows you to enter learning activities not found through the course catalog in SMART.

Click on to add the learning activity to your IDP. Use Tab to move from field to field.

(continued)

Flowchart

To enter a non-catalog learning activity, you must complete either **Sections 1 and 3** OR **Sections 2 and 3**. Follow these steps to determine which combination of sections to complete:



Section 1 – Completion Directions

- Course/Seminar #** Enter the course number or workshop/seminar code or number (if none/unknown, leave blank).
- Title** Enter the course or workshop/seminar title (**mandatory**). Do not abbreviate.
- Vendor Information**
- Name Enter vendor's full name (**mandatory**).
 - Address and Phone No. Entering this information will help expedite your request (**preferred, but not required**).
- Location of Training Site** Enter location where course will actually be taken (**preferred, but not required**).
- Training Period**
- Start Enter course start date (**preferred, but not required**).
 - Complete Enter course completion date (**preferred, but not required**).

Tab to Section 3 (see directions, page 30).

Section 1 - Example

Non-Catalog Courses/Workshops/Seminars
If you know a SPECIFIC course/seminar AND vendor, fill in sections 1 and 3.
If not, enter information in sections 2 and 3.

Section 1

Course/Seminar #: GER101
Title: Intro to German
Vendor's name, address, and phone number: School of Languages
1001 Hampton Rd. - Silver Spring, MD
301-903-6332
Location of training site: Rockville, MD
Training period
Start: 12/01/1998
Complete: 01/05/1999

Section 2

A detailed description will increase the chances of finding a suitable match.
Please be as specific as possible.

Description:

Section 3

Hours and costs should be approximated if unknown.

Cost: 100 Hours: 10.0 Target Date: 03/31/1999
Activity Type: College/University
Classification: OTH - Other

<< Add Done Delete >>

Here is an example of a correctly completed Section 1. If the section is not filled in correctly, an error message will appear with instructions for correcting the entry.



Click on  .

Correct the entry.

Click on  .

Section 2 – Completion Directions

Description

Enter a detailed description of the learning activity. Be as specific as possible to increase the chances of finding a suitable match. Be sure to use key words, technical references, or other identifiers.

Examples:

- I need a refresher course in environmental laws and regulations.
- I need basic Microsoft Word 7.0 training, willing to take CBT.
- I want to take a college level introductory German class at American University.

Tab to Section 3 (see page 30).

Section 2 - Example

Non-Catalog Courses/Workshops/Seminars
If you know a SPECIFIC course/seminar AND vendor, fill in sections 1 and 3.
If not, enter information in sections 2 and 3.

Section 1

Course/Seminar #:
Title:
Vendor's name, address, and phone number:
Location of training site:
Training period
Start: / /
Complete: / /

Section 2

A detailed description will increase the chances of finding a suitable match.
Please be as specific as possible.

Description:

Section 3

Hours and costs should be approximated if unknown.

Cost: Hours: Target Date:
Activity Type:
Classification:

Here is an example of a correctly completed Section 2. If you complete both Sections 1 and 2, an error message will appear warning that you cannot enter both a title in Section 1 and a description in Section 2.



Click on  .

Remove the title from Section 1 and place it in the description in Section 2.

Click on  .

Section 3 – Completion Directions - MANDATORY

Estimate the costs and hours if you do not know the exact figures. This will enable your supervisor/Office of Technical Training and Professional Development to track total costs and hours.

Cost	Enter the cost of the learning activity, if known (do not include travel, only include tuition fees).
Hours	Enter the hours required to complete the learning, if known.
Target Date	Click on drop down menu and select one of the dates. Remember, this date is a target for completion.
Activity Type	Click on drop down menu and select the type of learning activity.
Activity Classification	Click on drop down menu and select the subject matter classification of the learning activity.

Section 3 - Example

Non-Catalog Courses/Workshops/Seminars
If you know a SPECIFIC course/seminar AND vendor, fill in sections 1 and 3.
If not, enter information in sections 2 and 3.

Section 1

Course/Seminar #: GER101
Title: Intro to German
Vendor's name, address, and phone number: School of Languages
1001 Hampton Rd. - Silver Spring, MD
301-903-6332
Location of training site: Rockville, MD
Training period Start: 12/01/1998
Complete: 01/05/1999

Section 2

A detailed description will increase the chances of finding a suitable match.
Please be as specific as possible.

Description:

Section 3

Hours and costs should be approximated if unknown.

Cost: 0 Hours: 0.0 Target Date: 03/31/1999
Activity Type: College/University
Classification: OTH - Other

<< Add Done Delete >>

Here is an example of a correctly completed Section 3. If you do not complete it correctly, error messages will appear with instructions for completing the entry.

Correct any errors.

Click on **Done**.

When you have completed either *Sections 1 and 3* OR *Sections 2 and 3* as appropriate, click on **Add** to enter each additional learning activity.

To review the learning activities you have entered, use the **<<** and **>>**.

To delete any learning activities, click on **Delete**.

Click on **Done** when you're finished.

Click on [Main Menu](#) .

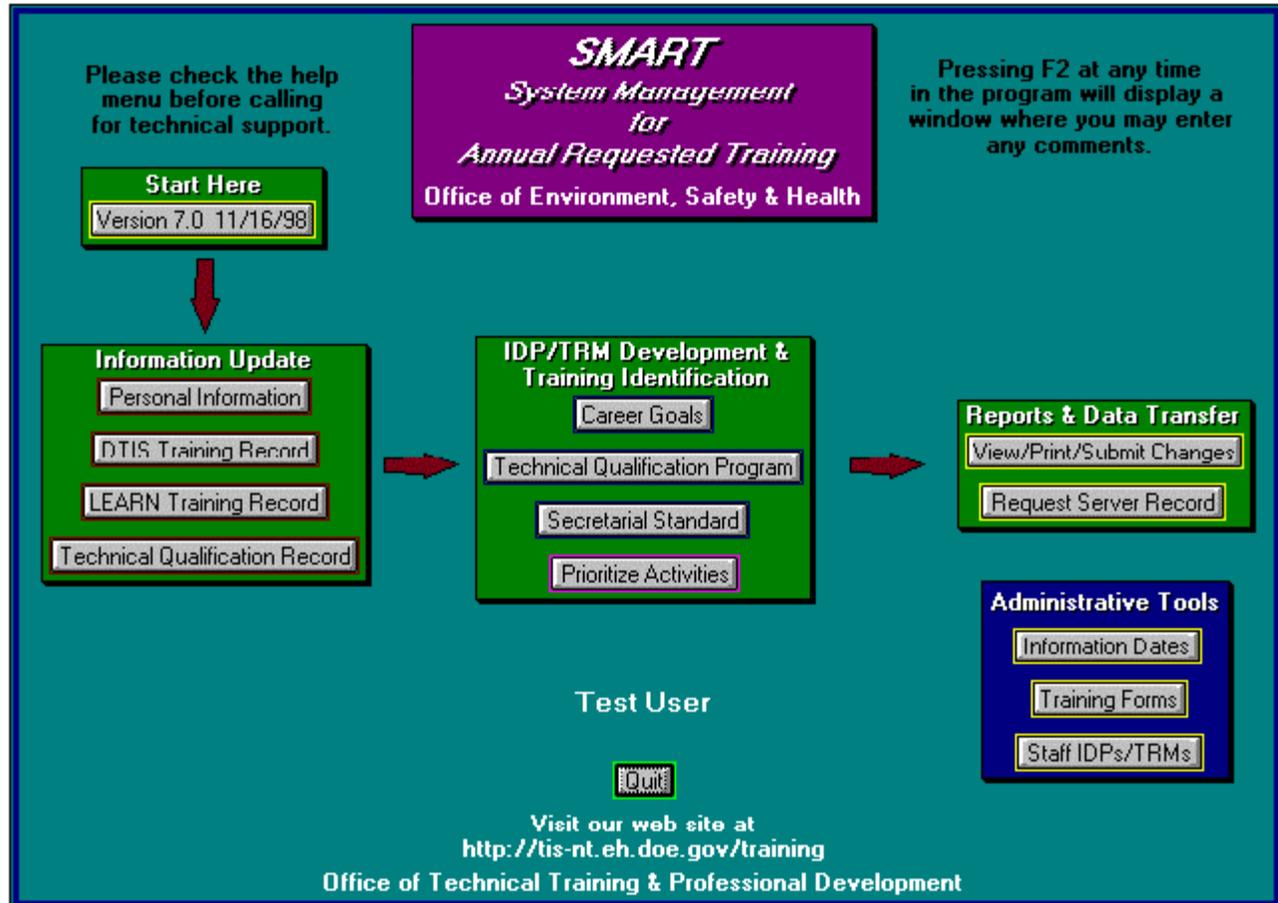
 (Before you leave the SMART program, be sure to export any changes so the server (master) record will be updated. See “View/Print/Submit Changes” on page 42.)

You have now completed the sixth step in the SMART program, writing your Career Goals.

If you are in the Technical Qualification Program, turn to the next page. If you hold a secretarial position, turn to “The Secretarial Standard” on page 37. If you do not fall into either of these categories, proceed to “Prioritizing Your Learning Activities,” page 39.

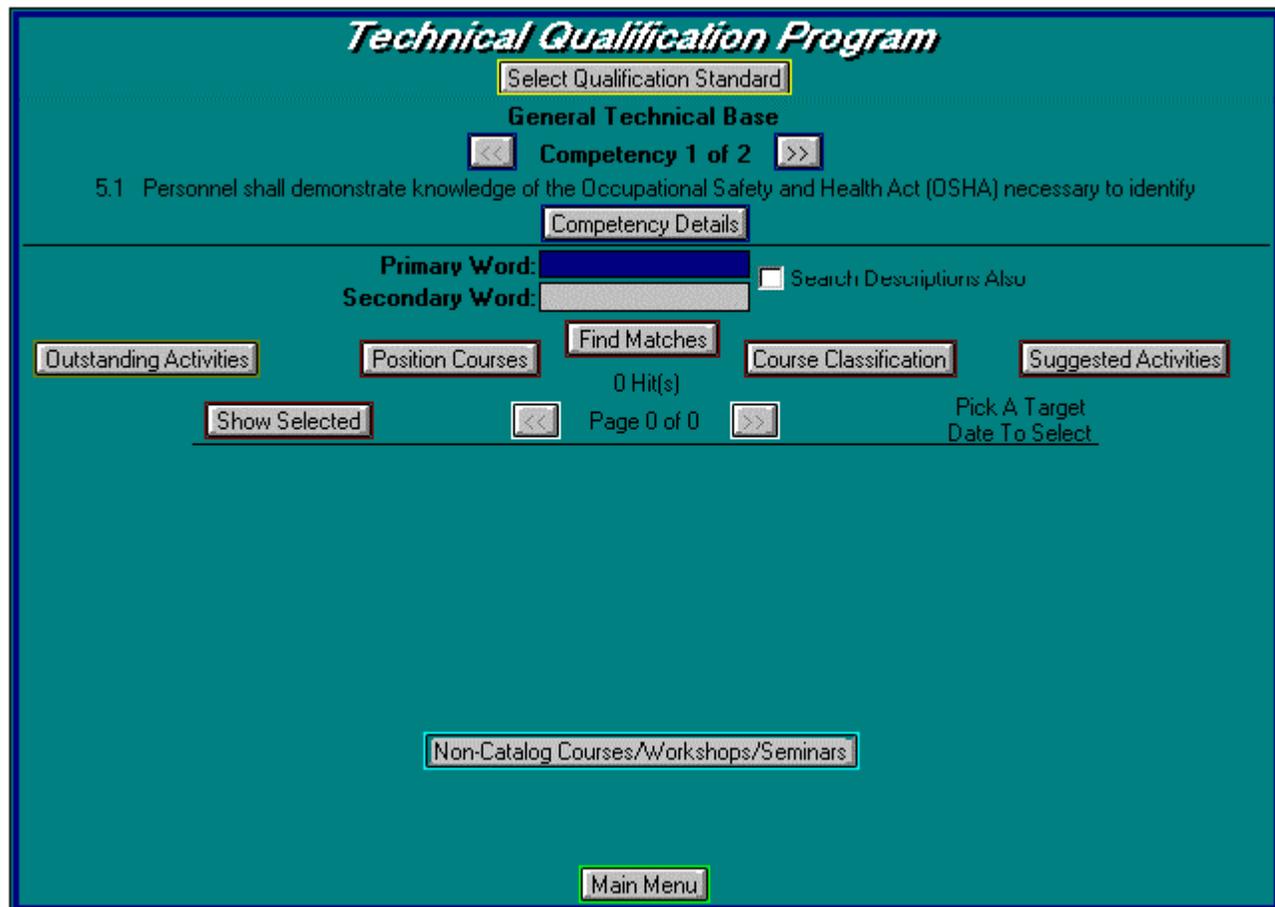
Identifying Your Technical Qualification Program Training Requirements

This is SMART's Main Menu.



You should complete this next step if you are in the Technical Qualification Program. If you are not, skip to the section of this Guide called “Prioritizing Your Learning Activities” on page 39. If you hold a secretarial position, skip to “The Secretarial Standard.”

If you are in the Technical Qualification Program, click on **Technical Qualification Program**.



The purpose of this screen is to identify the learning activities that you have determined are needed to satisfy your competencies. These screens are used after you have established a baseline TQR. Only competencies selected as needed for each standard will appear.

Consult the Help menu to review more information on how to complete this screen. When you are finished with Help, exit the program.

Click on **Select Qualification Standard** to see a list of your required Qualification Standards. Double-click on the standard with which you want to work.

Click on **<<** and **>>** to move back and forth through the competencies associated with the standard. If you need to review the supporting knowledge and skills for this competency, click on **Competency Details**. Click on **Done** when you are finished.

You may identify any needed learning activities for each competency using the same process that you used in “Selecting Training to Achieve Your Goals,” pages 23 - 32.

Clicking on [Suggested Activities](#) shows activities that are linked to TQP competencies.

Describe other training such as self-study, OJT, etc. using [Non-Catalog Courses/Workshops/Seminars](#).

The screenshot displays the 'Technical Qualification Program' interface. At the top, there is a 'Select Qualification Standard' button. Below it, the 'General Technical Base' section is active, showing 'Competency 1 of 2'. A description for this competency is provided: '5.1 Personnel shall demonstrate knowledge of the Occupational Safety and Health Act (OSHA) necessary to identify'. A 'Competency Details' button is also present. The search interface includes fields for 'Primary Word' and 'Secondary Word', with a 'Search Descriptions Also' checkbox. Navigation buttons include 'Outstanding Activities', 'Position Courses', 'Find Matches', 'Course Classification', and 'Suggested Activities'. The search results show '25 Hit(s)' on 'Page 3 of 7'. A table lists four courses with their details and a 'Pick A Target Date To Select' dropdown menu.

Course ID	Course Title	Hours	Cost	Description	Target Date
ENV111	Environmental Compliance	16.0 Hrs	\$0	DOE/EH-63 Nuclear Operations and Analysis	No Date
ENV119	Environmental Communication	24.0 Hrs	\$0	Army and Airforce, Department of	No Date
ENV120	Principles of Environmental Restoration	24.0 Hrs	\$U	DOE/EH-413 - HLHA/LEHLLA Division and EM-1	No Date
ENV122	Environmental Law - An Introduction	8.0 Hrs	\$0	DOE/HR-332.1	No Date

When you have selected all the appropriate training for the General Technical Base Qualification Standard competencies, click on [Select Qualification Standard](#) to choose your Primary Functional Area(s) and repeat the training selection process.

When you have selected all the appropriate training for your primary functional area, click on [Select Qualification Standard](#) and repeat the process for your other Functional Area(s).

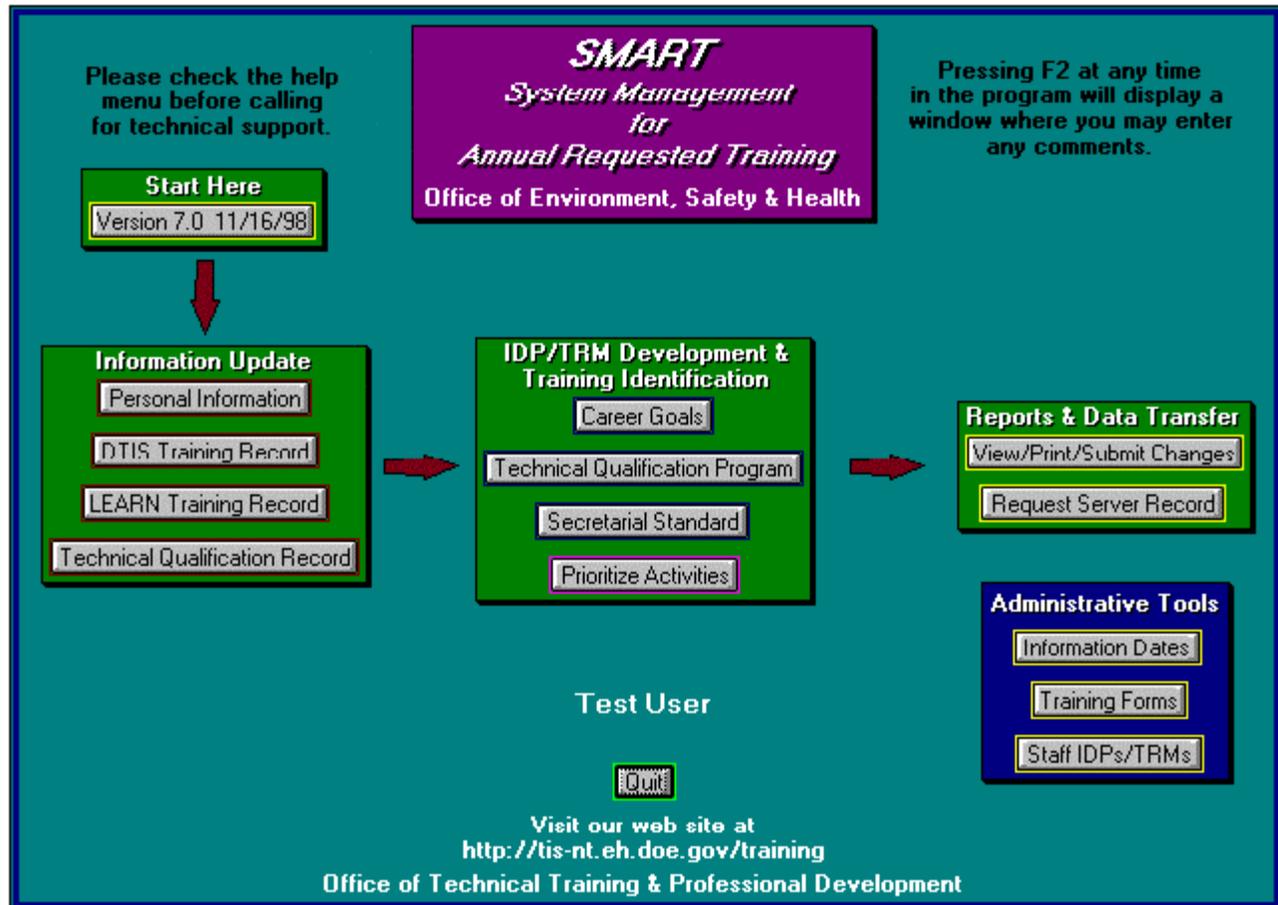
When you have completed this process for all applicable functional areas, click on .

Four buttons are used to move within this screen. To move from competency to competency, click on the  and  buttons on either side of “Competency.”

To move from page to page, click on  and  on either side of “Page.”

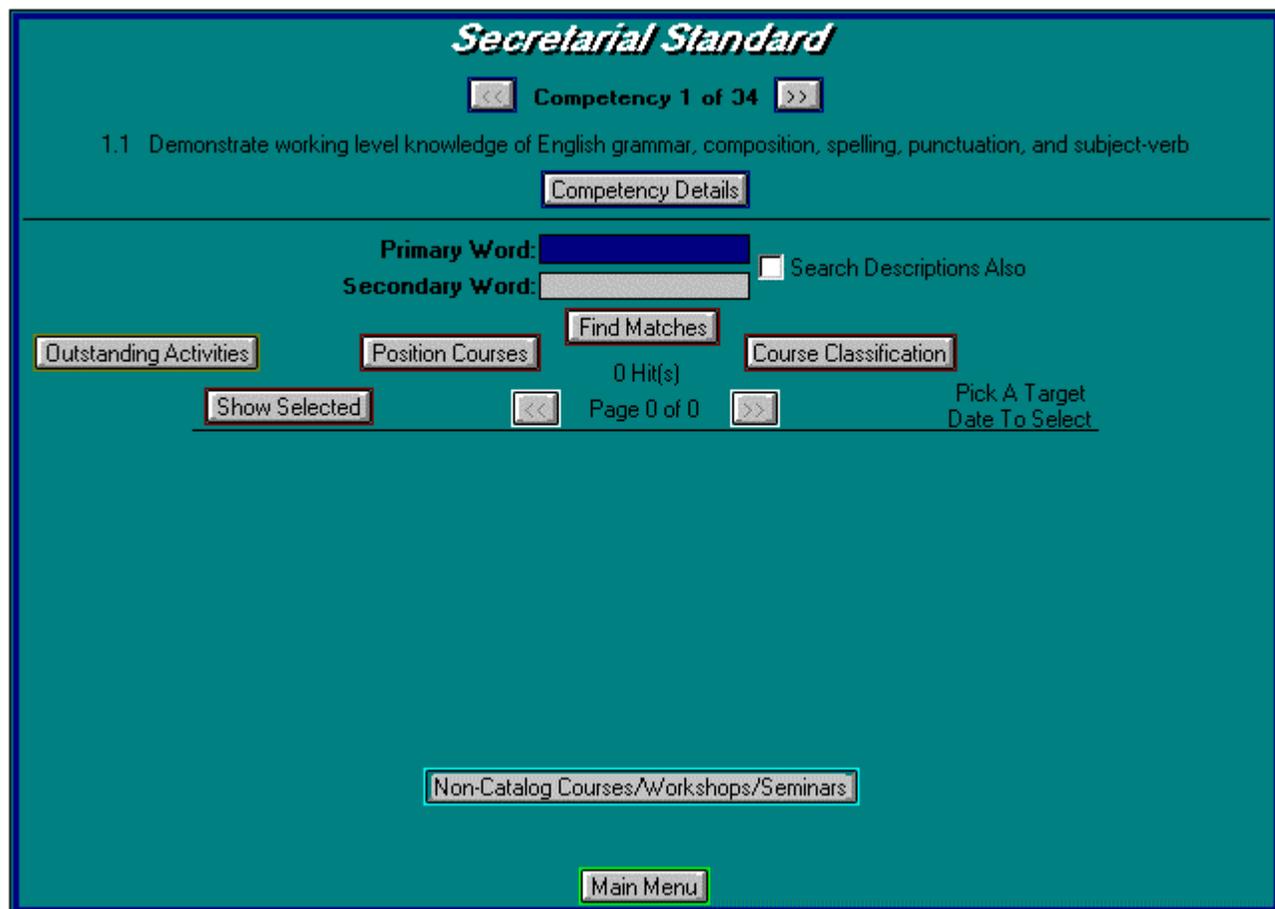
The Secretarial Standard

This is SMART's Main Menu.



If you hold a secretarial position, you may use the competencies in the secretarial standard as a framework.

Click on **Secretarial Standard** .



The purpose of this screen is to identify learning activities that you and your supervisor have determined is required to satisfy your competencies.

Consult the Help menu to review more information on how to complete this screen. When you are finished with Help, exit the program.

Click on << and >> to move back and forth through the competencies associated with the standard. If you need to review the supporting knowledge and skills for this competency, click on Competency Details. Click on Done when you are finished.

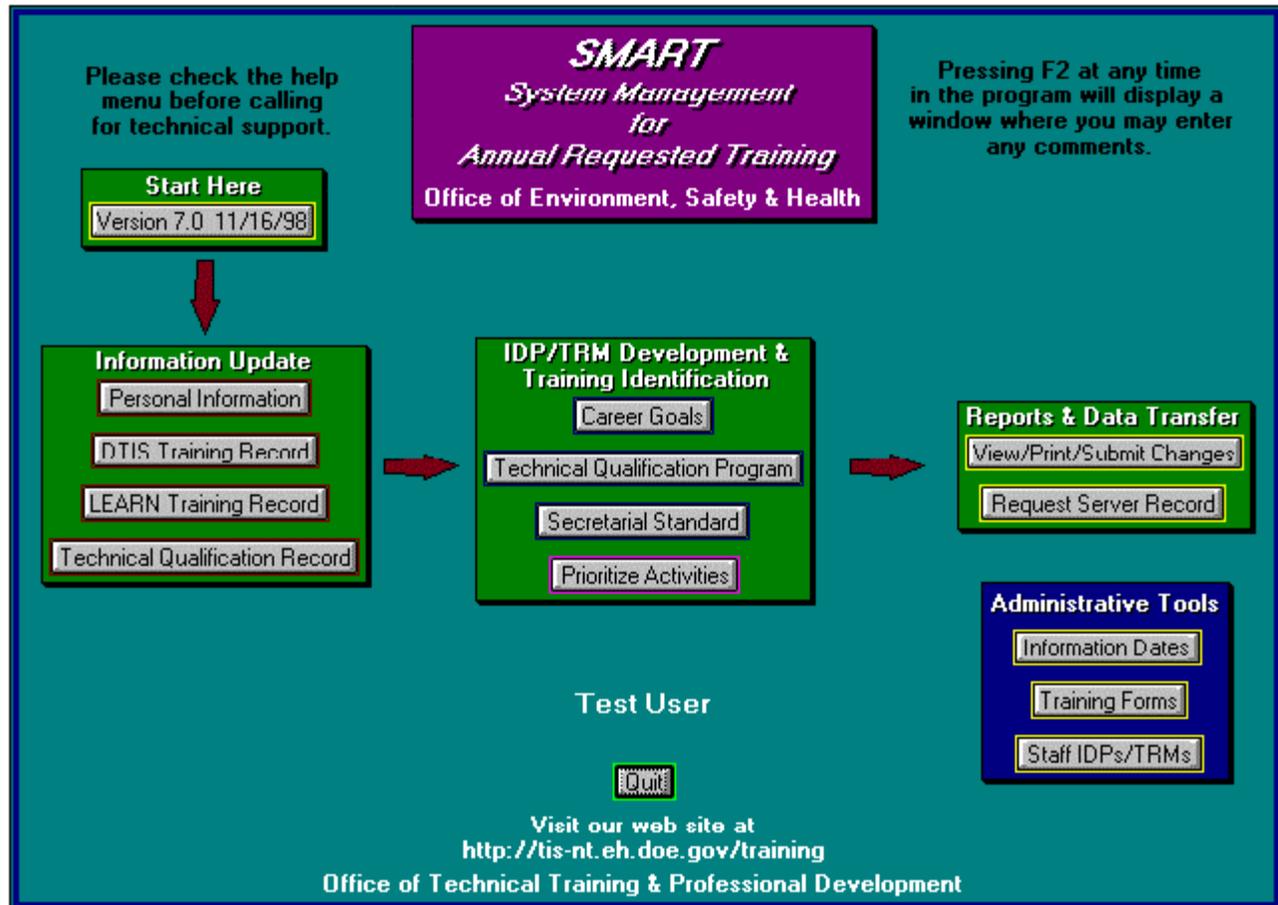
You may identify any needed learning activities for each competency using the same process that you used in “Selecting Training to Achieve Your Goals,” pages 23 - 32.



(Before you leave the SMART program, be sure to export any changes so the server (master) record will be updated. See “View/Print/Submit Changes” on page 42.)

Prioritizing Your Learning Activities

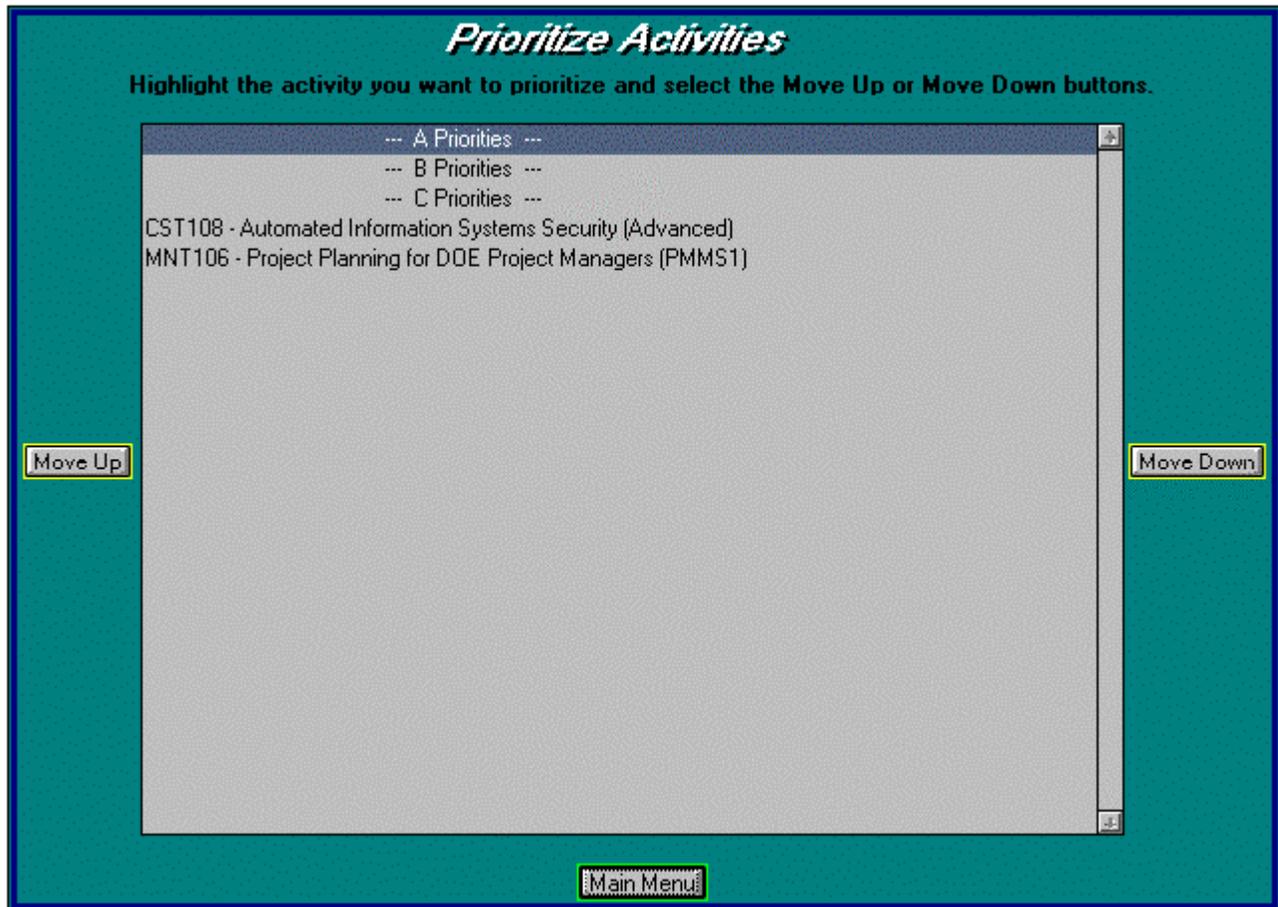
This is SMART's Main Menu.



You have reached the seventh step in the program, "Prioritize Activities."

Click on **Prioritize Activities**.

(continued)



The purpose of this screen is to help you order your learning activities on the basis of priority, with “A” priorities being of greatest importance. To move items up and down among the priority levels:

1. **Click to highlight one of your learning activities. It is suggested that you begin with the learning activity of most importance to you.**
2. **Click on or as many times as needed to move the activity under the desired priority level.** SMART assigns a letter and a number showing where each activity is positioned. When you print your IDP, A Priorities will print with A1, A2, etc., B Priorities will print with B1, B2, etc.
3. **Repeat for each learning activity.**

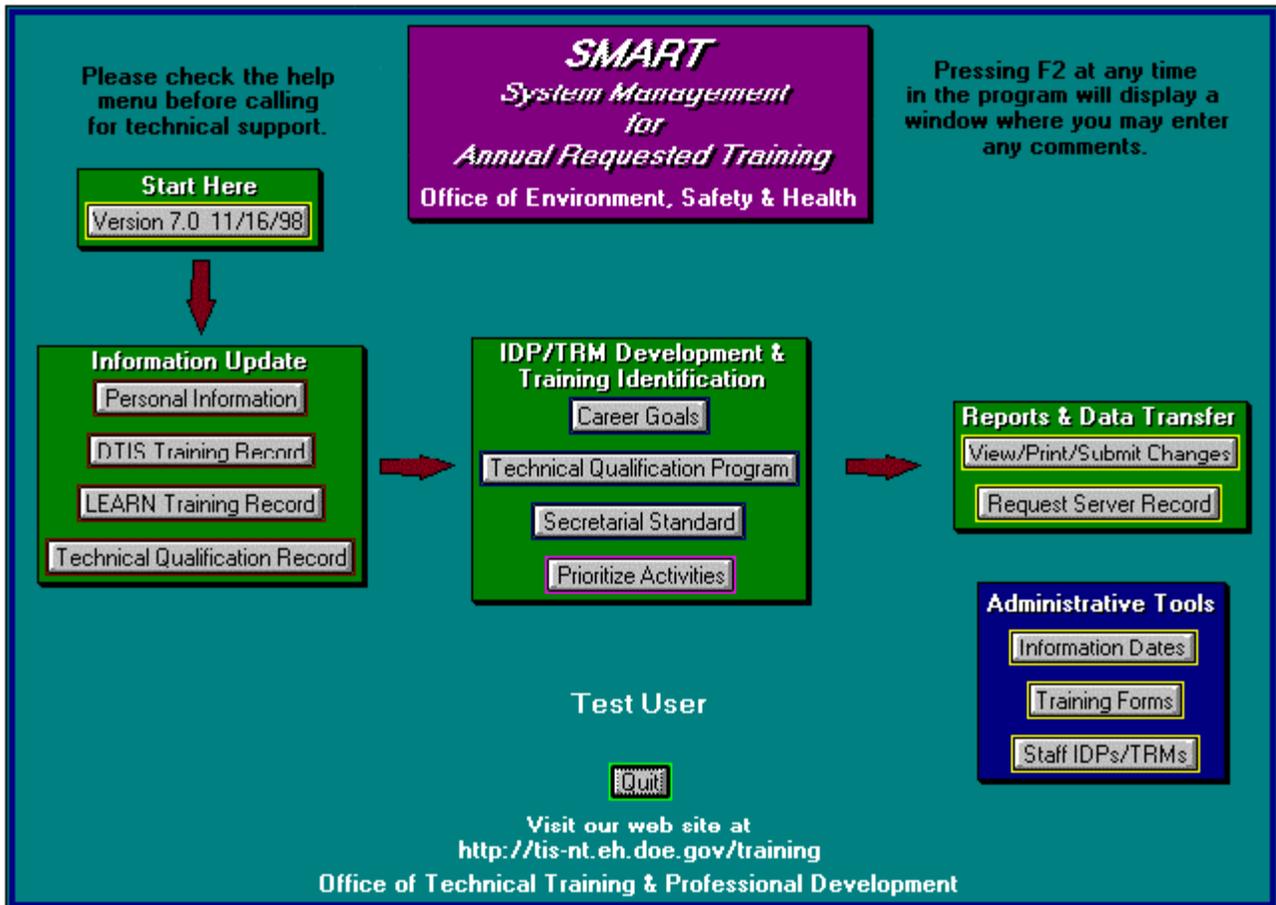
If an activity is disapproved by your supervisor, SMART doesn't re-prioritize the remaining activities. The numbers remain the same.

Tip: You should print out a copy of your IDP for your personal records prior to submitting it to your supervisor. This will be your only record of what you submitted. Your approved IDP may not match the IDP submitted. (See example “IDP Plans” in Appendix C.)

Click on [Main Menu](#) when you are through.

View/Print/Submit Changes

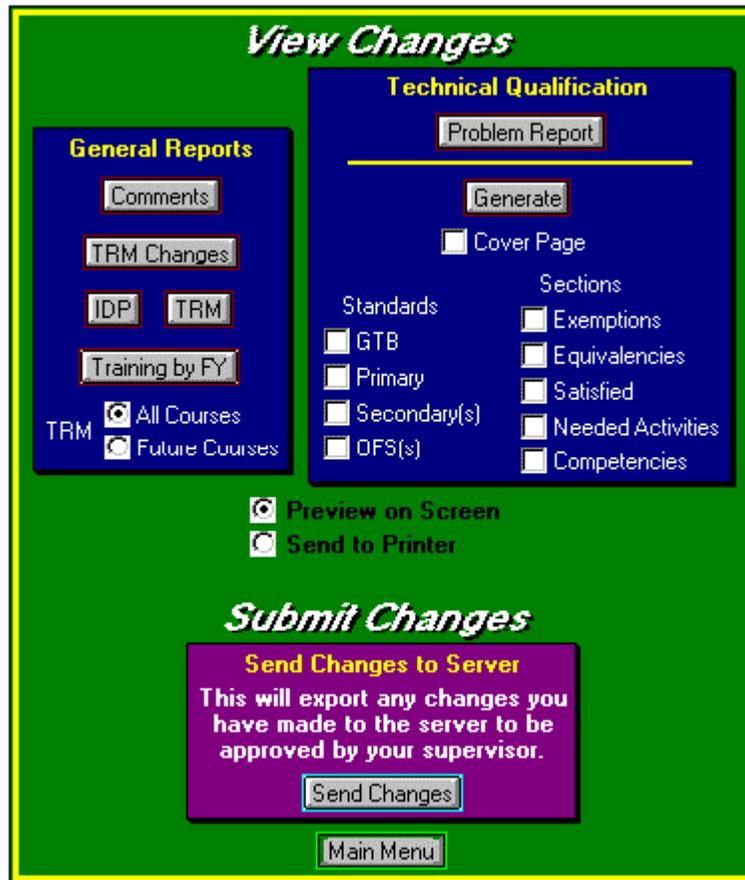
This is SMART's Main Menu.



You have reached the eighth step in the program, "Reports and Data Transfer."

The Office of Technical Training and Professional Development, EH TTPD, is responsible for maintaining your server record. You must transfer your changes electronically to EH TTPD so that the changes go on your server record.

Click on **View/Print/Submit Changes**.



To view your changes on the screen or print a hard copy, click on any report you need.

Tip: If you wish to view the report before printing, click on Preview On Screen. Click on  or the magnifying glass cursor to enlarge the area of the report you wish to see. Click on  when you are finished viewing the report.

Tip: To print reports, be sure to click on “Send to Printer” before selecting a report.

Select a report from the following options:

- General Reports Box. The Notes And Comments Report shows everything you entered using the F2 key. TRM changes show only additions, deletions, and changed target dates. The IDP Report will show all Goals and Standards and the learning activities and prioritization linked to each. Before selecting the TRM Report, set the options below the button to “All Courses” or “Future Courses.” The TRM Report reflects activities selected and entered in your training history.

Click on the report you wish to view or print.

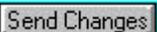
- **Technical Qualification Reports Box.** Only TQP participants have this report option. Each report shows all entries for the status indicated on the button. Selecting the “Competencies” option will give you a Competency Status Report, showing the status you identified for each competency: equivalency, exemption, developmental activities.

Click on  to view or print the selected report.

Tip: You should always run a Problem Report when you see a Changes Processed date when you log in. The Problem Report lists all problems with your TQR to date, such as multiple status for a given competency. (See the Problem Report example in the Appendix at the end of this Guide.)

Tip: To print your entire TQR, click on all the standards and sections.



If you are ready to send your changes to EH TTPD for updating your server record, click on . You should share your changes with your supervisor before sending them; however, your supervisor will receive a copy of all changes for his/her approval before the changes are made to the server record.

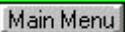


If you have previously sent changes that your supervisor has approved but which have not yet been processed by EH TTPD, you will see the following message:



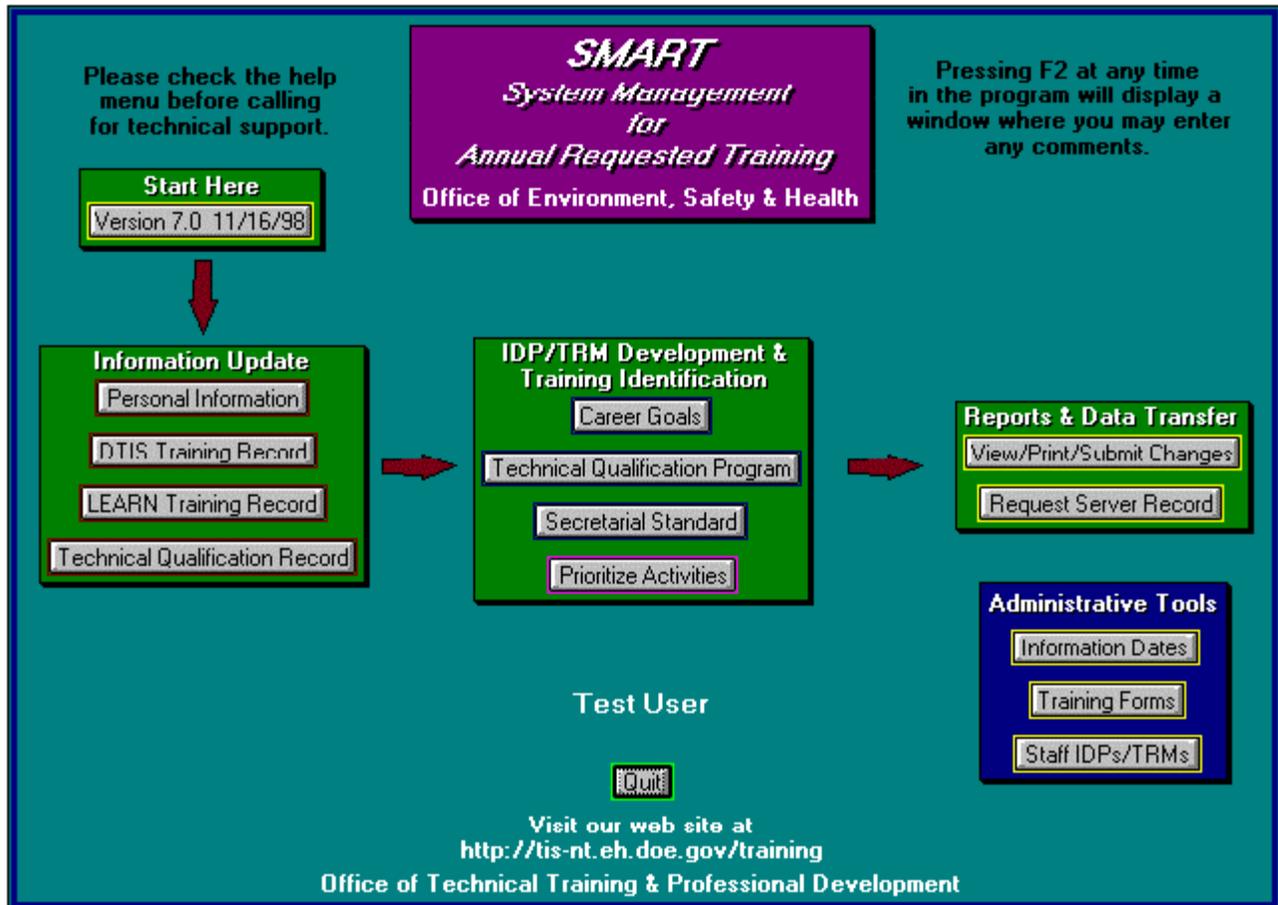
You will need to wait until your changes are processed to send your latest changes.

The processing status of your record will be indicated on the Data Files (see page 50) screen when you log into SMART the next time, so that you will know whether or not your changes have been made to the server record.

If you are not ready to send changes to EH TTPD, click on .

Requesting Your Server Record

This is SMART's Main Menu.



Do this step only when the SMART program prompts you to do so. Requesting your Server Record causes your Local Record to be written over by whatever is currently on your Server Record.

Before you use this function, you must first save any changes you want to keep by accessing the

View/Print/Submit Changes section and clicking on **Send Changes** .

Check the Data Files screen first by clicking on **Information Dates** . After the Data Files screen (see page 50) shows the changes have been processed, you may safely request your server record.

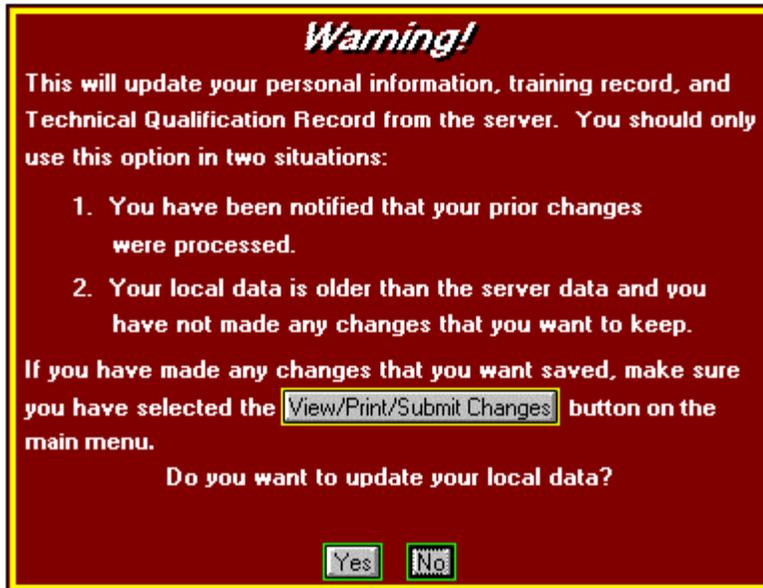
Steps for Requesting Server Record

Click on **Request Server Record** .



If you see this message, consider carefully your options:

- If you have made changes to your Local Record that you wish to save, choose **No** and return to **View/Print/Submit Changes** and submit your changes first.
- Clicking on **Yes** means you will overwrite your Local Record with the information in the Server Record. If you have made no changes to your Local Record that you wish to keep, choosing **Yes** is a viable option.



Backing Up/Restoring Your Local Record

It's a good idea to make a backup copy of your Local Record onto a diskette. As noted previously, using **Request Server Record** and "Restore IDP From Server" will overwrite your Local Record with the last data processed.

If you have made changes but are not ready to send them to the server for processing, you can save a backup copy of them in case anything happens to your Local Record kept on your computer's hard drive. (SMART will overwrite your Local Record in 30 days, so be sure to send your changes in promptly.)

To make a backup copy onto a diskette, click on the SMART drop down menu and select "Backup/Restore Local Record." The following menu will appear.



To backup to a diskette, put a blank diskette into drive A and click on **Backup**.

To restore from your backup diskette, place backup diskette into drive A and click on **Restore**.

Restoring a Deleted IDP

If for some reason, your IDP has been deleted or is unavailable to you, you may use this function to restore your IDP.

Tip: If this function does not work, call your SMART Administrator at 301-903-6332 to verify that you have a valid IDP.

Click on the **S**MART drop down menu and select “Restore IDP from Server.”

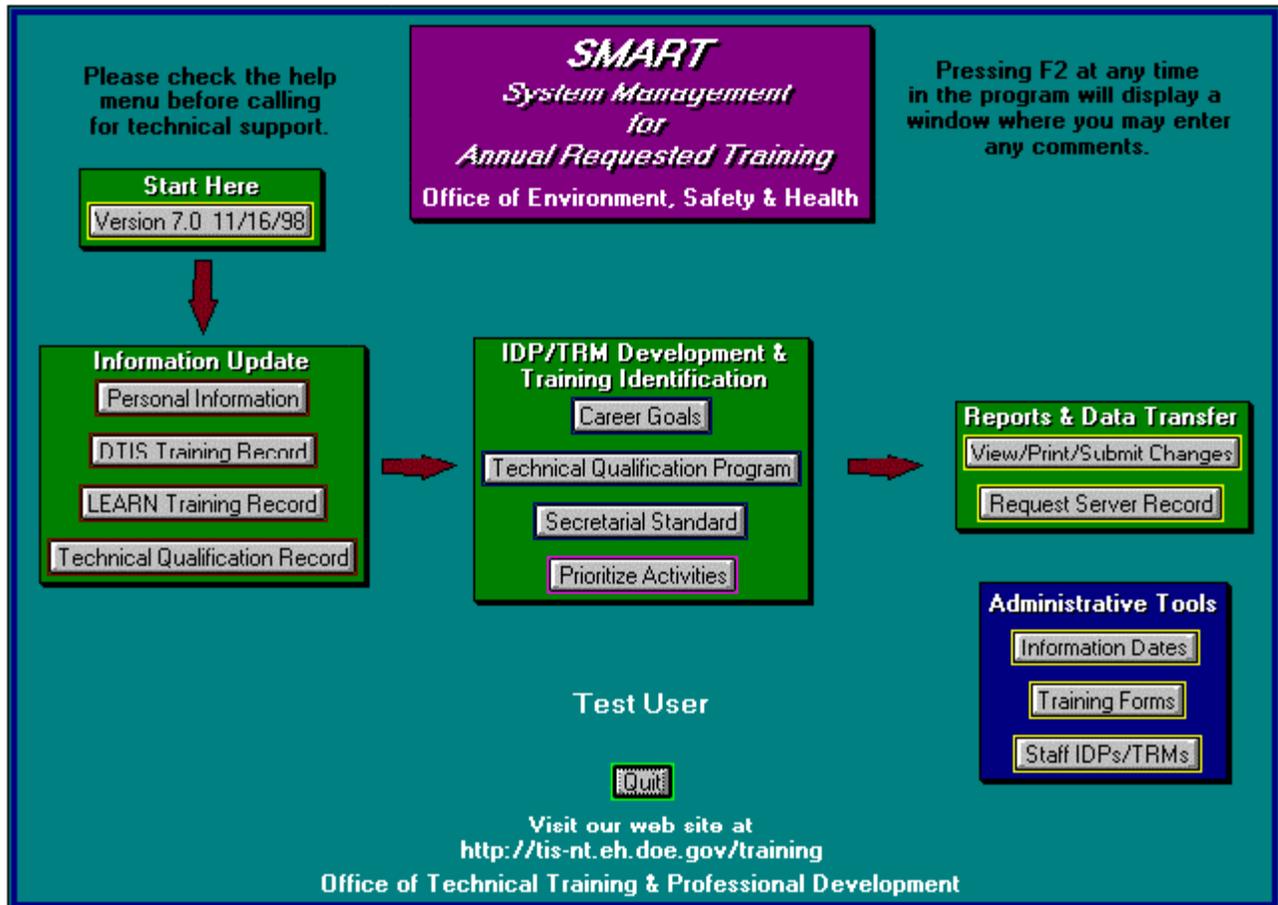
A warning message will be displayed.



Clicking on **Yes** will download a copy of the last version of your IDP that you sent for approval. This will overwrite your current IDP, so only do this if your current IDP has been deleted already. Clicking on **No** cancels the data transfer.

Using Information Dates

This is the Main Menu for SMART.



These dates are important because they tell you the status of your file. By checking the Information Dates, you can determine if your supervisor has reviewed/approved your changes or if the training organization has posted the changes your supervisor approved.

You can see this information by clicking on the Information Dates button in the Administrative Tools Box.





Server Record. Date when the training organization last updated files and posted to the server.

Local Record. Date of the working file you stored in your local SMART folder.

Changes Sent. Last date when you submitted changes for approval.

Changes Approved. Last date when changes were approved by your supervisor.

Changes Processed. Last date when your changes were pulled for processing.

You can use these dates to determine if your changes have been approved, if they have been posted to the server, and if your local data files need to be updated.

If you see the message:

1. **“The application is ready for you to work on your records.”**

You may proceed using SMART.

2. **“You have prior changes that have been processed, but not posted to the server.”**

DO NOT USE SMART AT THIS TIME. Call the SMART Administrator at 301-903-6332.

3. **“You have sent changes which are waiting for supervisor approval.”**

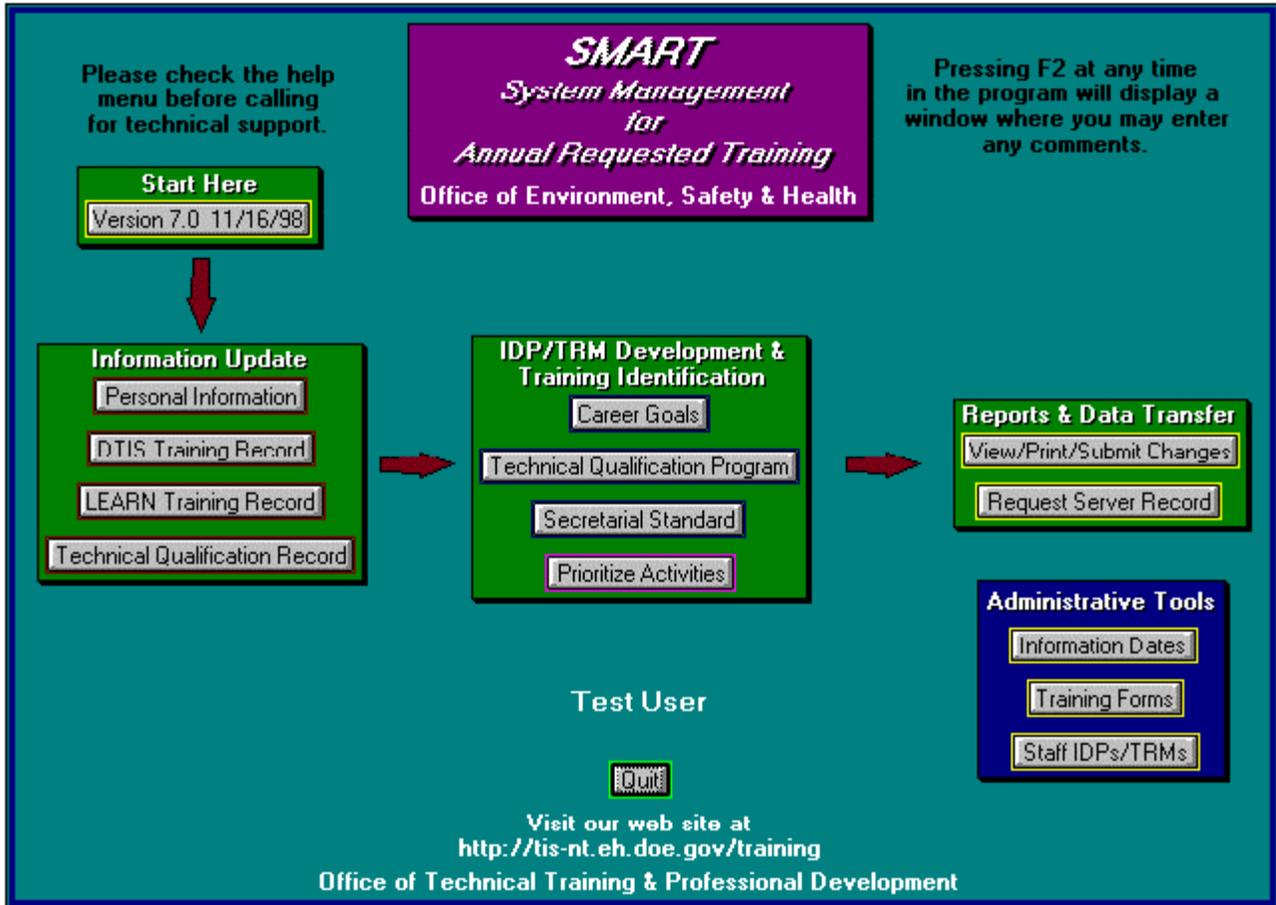
Do you want to update your records awaiting supervisor approval?

If yes, make changes and send immediately.

If no, do not use SMART. Re-notify your supervisor that your records are awaiting approval.

Using the Training Request Form

This is the Main Menu for SMART.



Now that you have updated your records and identified training that you need, you may use the **Training Forms** function to request courses.

Click on **Training Forms**.

Tip: Create a folder called "Training" on your **c:**; **n:**; or **a:** drive. If you don't know how to create a folder, call the SMART assistance line at 301-903-6332.



To submit an electronic training request, click on  .

Training Request Form (TRF)

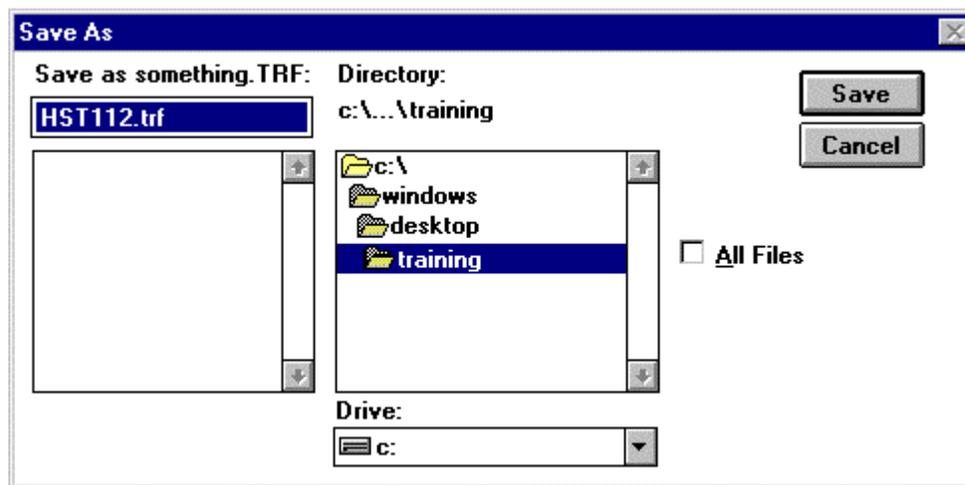
A. TRAINEE INFORMATION					
1. Identifier	2. Last Name	First Name	MI	3. Department	4. Work Phone
DS2850	SMOOT-WOOD	Daniel	M	DP&A(-OTT&PD[301-903-6482
B. TRAINING COURSE DATA					
5. Catalog/Course No. (Attach a copy of the brochure to this TRF.)		7. Location of training site			
6. Name, address, and phone number of training vendor		8. Course title			
		9. Training period		10. Training hours	
		a. Start	/ /	a. Start time	
		b. Complete	/ /	b. End time	
				11. Total training hours	
				0.0	
				<input checked="" type="checkbox"/> IDP Related	
				<input checked="" type="checkbox"/> TQP Related	
C. ESTIMATED COSTS					
12. Direct costs		Amount	13. Indirect costs		Amount
a. Tuition		0.00	a. Travel		0.00
b. Books or materials		0.00	b. Per Diem		0.00
c. Other		0.00	c. Other		0.00
d. TOTAL		0.00	d. TOTAL		0.00
D. REVIEW & APPROVAL					
14. Training Priorities					
<input type="checkbox"/> Mandatory Training - training that is required by law (e.g., environmental laws and regulations, Code of Federal Regulations (CFRs), Executive Orders and DOE Orders).					
<input type="checkbox"/> Training that provides skills or knowledge that is critical for the performance of the employee's current or future job/task assignment.					
<input type="checkbox"/> Training required to maintain job-related professional certification.					
<input type="checkbox"/> Training that provides skills or knowledge that is necessary for the employee to perform tasks currently being performed by a contractor.					

Create Electronic Copy
Open
Done
Save
Print TRF

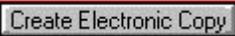
Consult the **Help** menu to review more information on how to complete this screen. When you are finished with **Help**, exit the program.

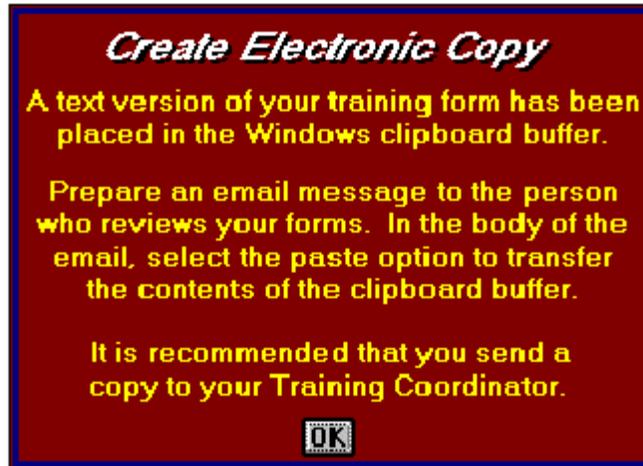
When you have completed the TRF, click on **Save**. This will save your TRF for easy retrieval at a later time. You will see the following screen:

Tip: **Save the TRF in your “Training” folder, using .TRF as the filename extension, for example, HST112.TRF. (This would identify the course and that the file is a Training Request File.)** To retrieve your file at a later time, click on **Open** and then select your file from the Training folder.



Be sure to always save to the drive where you created your “Training” folder, not the default network drive (s:).

To submit your training request, click on  .



Go into cc:Mail or Lotus Notes. Address an e-mail message to your supervisor with a copy to your training coordinator. Then place the cursor in the text area of the message and click the mouse. Go to the top of the screen and click on Edit, and then click on Paste. The entire training request will be pasted into your message to your supervisor.

Send the message to your supervisor for approval.

Supervisors' Note



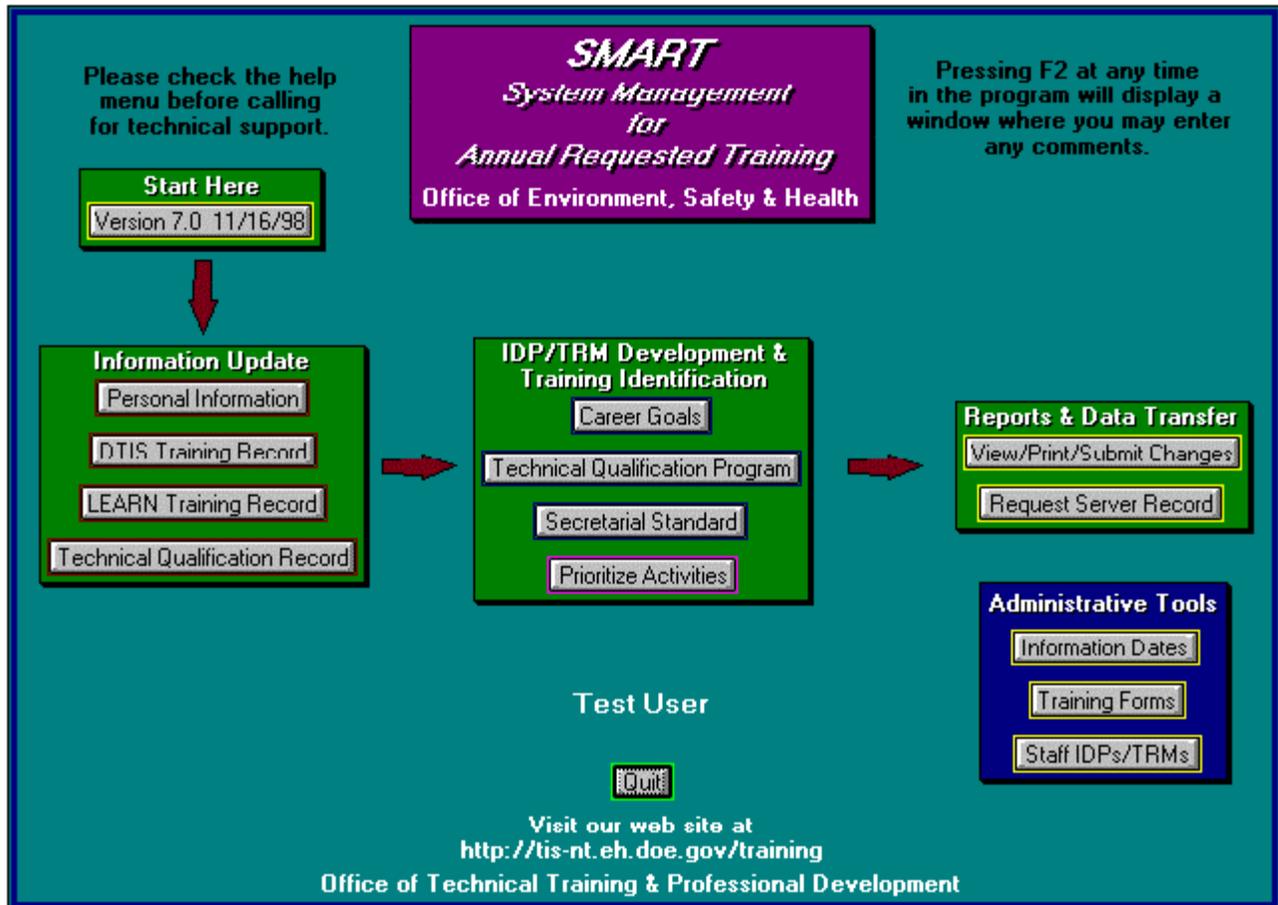
If you are using Lotus Notes to send approved training requests to the next authorizing official, you must follow these steps:

1. Click on forward.
2. Address for next authorization (or EH Training Registration if you are the final approval required).
3. Scroll down message to your appropriate line for authorization.
4. Enter your authorization code.
5. Click on Send.

Approvals must be done in this order or Lotus Notes will not accept the approval codes.

Completing Your Training Evaluation Form

This is the Main Menu for SMART.



After you have completed your training, you should submit a training evaluation form.

Click on **Training Forms**.

Tip: Create a folder called “Training” on your **c:**; **n:**; or **a:** drive. If you don’t know how to create a folder, call the SMART assistance line at 301-903-6332.

Your evaluation forms are not retrievable by the SMART Administrator, so it is highly recommended that you save them into a “Training” folder.



Click on  .

After your training is completed, you must submit a training evaluation form (TEF) to EH TTPD within two weeks. Use this form to send your evaluation electronically to your supervisor for approval.

Failure to send in an evaluation with 60 days means your activity will not be shown as "Completed." It will show as cancelled in your record.

Training Evaluation Form (TEF)

Course No:		Course Title:	
Course Provider:			Instructor Name:
Course Start Date: / /	Hours: 0.0	Location:	

DIRECTIONS: Please enter the appropriate number. If any do not apply, select NA. The rating numbers are from 1 to 10 with 1 as completely "no", 5 as "maybe", and 10 as "positively yes". Thank you in advance for your evaluation of this course.

	1..10	Questions
<input type="checkbox"/> NA	<input type="text" value="0"/>	The objectives were presented clearly.
<input type="checkbox"/> NA	<input type="text" value="0"/>	The objectives were what was advertised.
<input type="checkbox"/> NA	<input type="text" value="0"/>	The instructor(s) showed an adequate expertise in the subject(s) to present the training.
<input type="checkbox"/> NA	<input type="text" value="0"/>	The knowledge and skills were presented in a clear, concise way.
<input type="checkbox"/> NA	<input type="text" value="0"/>	The student materials provided something that I can use as a reference in the future.
<input type="checkbox"/> NA	<input type="text" value="0"/>	Additional materials used in the training (videos, transparencies, etc.) enhanced the context of the presentation.
<input type="checkbox"/> NA	<input type="text" value="0"/>	Attending this training will enhance my ability to perform my job in the future.
<input type="checkbox"/> NA	<input type="text" value="0"/>	The test was a good measure of the training.
	<input type="text" value="0"/>	My overall rating for this training would be (1 = not good, 5 = mediocre, 10 = great).

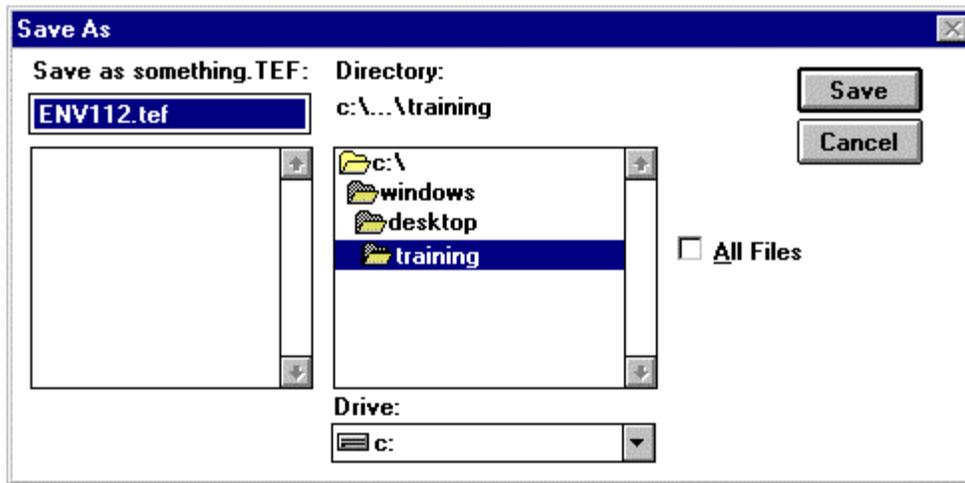
COMMENTS: We would like to hear from you so please use the space below to make any specific comments you may have. We would appreciate an explanation of any rating less than a 4.

Complete this form and click on .

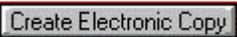
When you have completed the TEF, click on . This will save your TEF for easy retrieval at a later time. You will see the following screen:

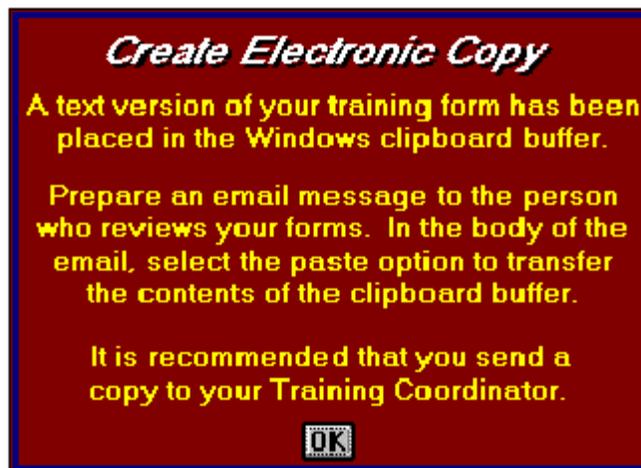


Tip: Save the TEF in your "Training" folder, using .TEF as the filename extension, for example, HST112.TEF. (This would identify the course and that the file is a Training Evaluation Form.) To retrieve your file at a later time, click on and then select your file from the Training folder.



 Be sure to always save to the drive where you created your “Training” folder, not the default network drive (s:).

To submit your training request, click on  .



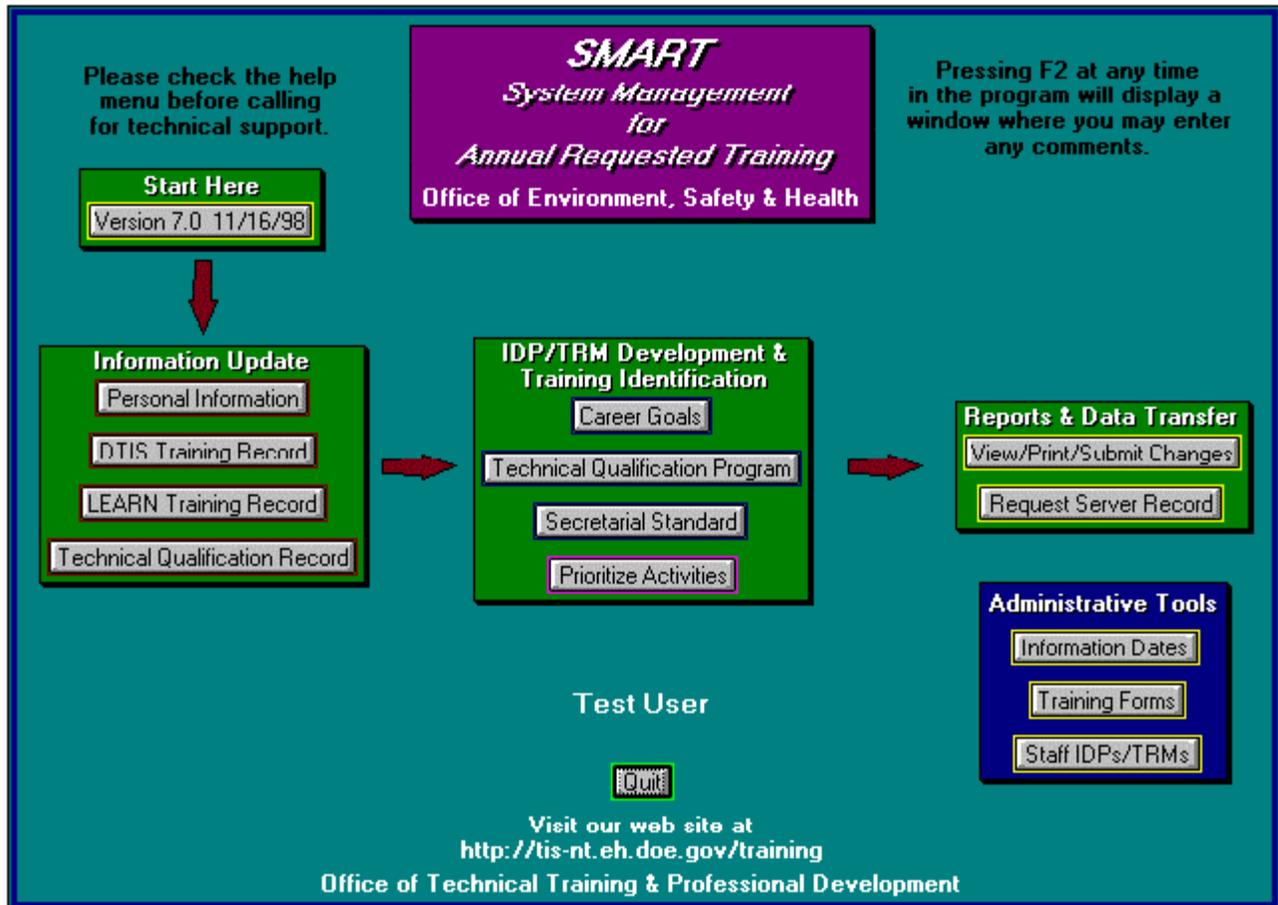
Go into cc:Mail or Lotus Notes. Address an e-mail message to your supervisor with a copy to your training coordinator. Then place the cursor in the text area of the message and click the mouse. Go to the top of the screen and click on Edit, and then click on Paste. The entire training request will be pasted into your message to your supervisor.

Send the message to your supervisor for approval.

If you wish to print a hard copy, click on  .

Using the Continued Service Agreement (CSA)

This is SMART's Main Menu.



If you take non-government training exceeding 80 hours, you are required to complete a Continued Service Agreement (CSA) and submit along with your training request form. If you need to print a copy of your CSA, you may use this function in SMART to do so.

Click on **Training Forms**.

Tip: Create a folder called "Training" on your **c:**; **n:**; or **a:** drive. If you don't know how to create a folder, call the SMART assistance line at 301-903-6332.



Click on  .

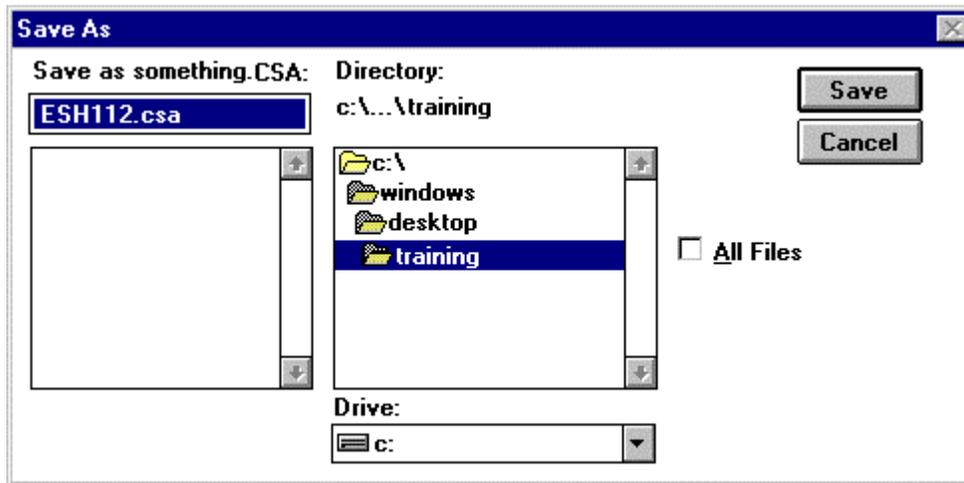
Continued Service Agreement (CSA)

1. Identifier DS2850	2. Last Name SMOOT-WOOD	First Name Daniel
3. Catalog/Course No. <input type="text"/>	4. Training period	
	a. Start <input type="text"/> / <input type="text"/> / <input type="text"/>	b. Complete <input type="text"/> / <input type="text"/> / <input type="text"/>
5. Total training period <input type="text"/> 0.0		
6. Period of obligated service Working Days <input type="text"/> 0	7. Estimated completion date of obligated service <input type="text"/> / <input type="text"/> / <input type="text"/>	

Complete the CSA.

When you have completed the CSA, click on  . This will save your CSA for easy retrieval at a later time.

Tip: **Save the CSA to your “Training” folder, using .CSA as the filename extension, for example, HST112.CSA. (This would identify the course and that it is a Continued Service Agreement.)** To retrieve your file at a later time, click on **Open** and then select your file from the Training folder.



 Be sure to always save to the drive where you created your “Training” folder, not the default network drive (s:).

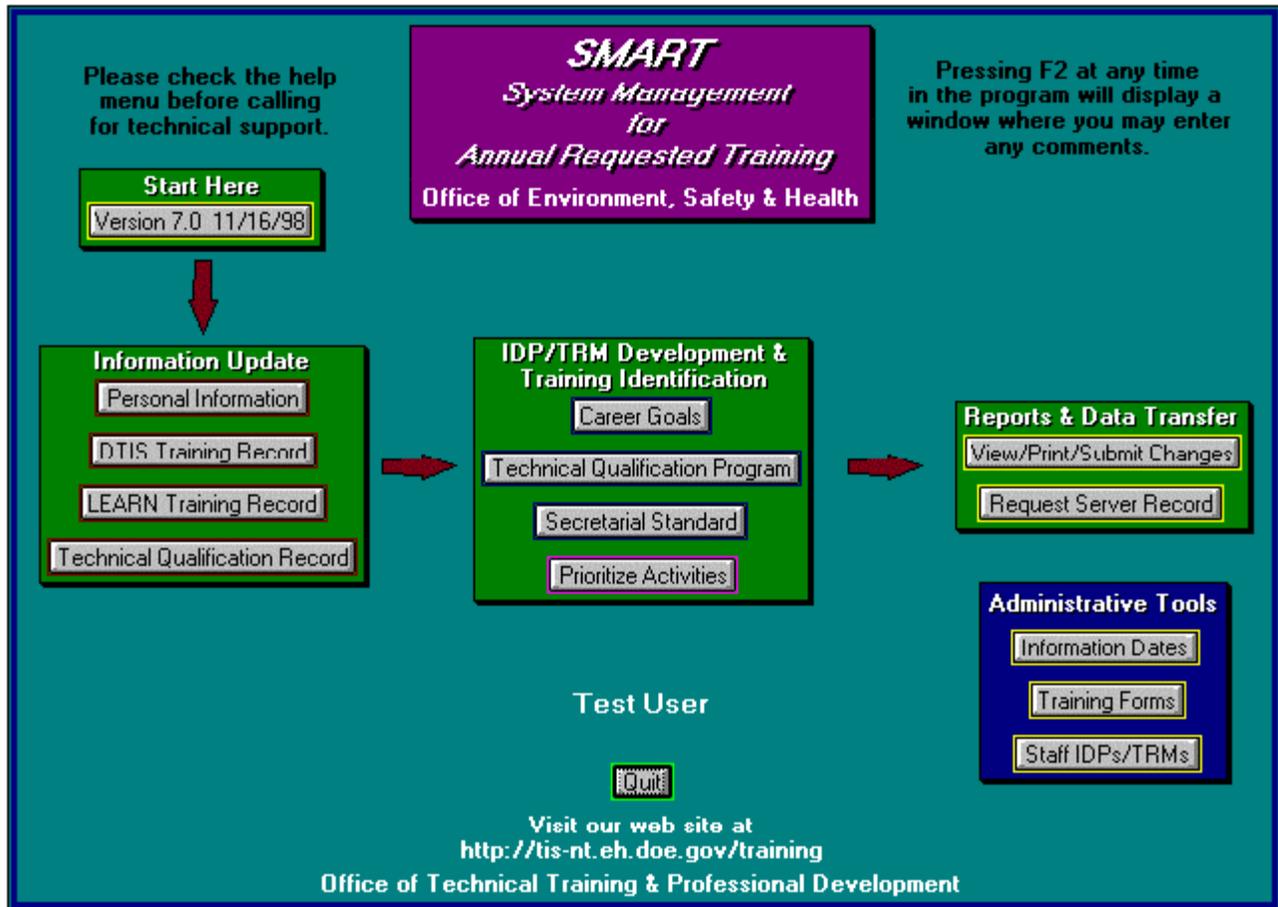
To submit your Continued Service Agreement, click on **Print CSA**.

Sign and send to EH TTPD in the Forrestal Building via plant mail.

When you are finished, click on **Done** to return to the Main Menu.

Wrap-Up

This is SMART's Main Menu.



Congratulations! You have completed all steps in the SMART program. If you have any questions or concerns about this program, please call the SMART assistance line: 301-903-6332.

Remember, each time you use the SMART program, be sure to click on the **Version 7.0 11/16/98** and see if there are any changes to the program.

Click on **Quit** to leave the program.

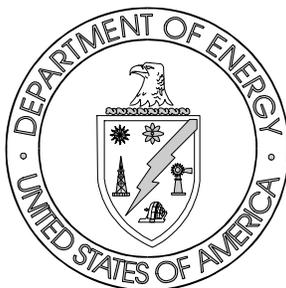
After quitting, you will be prompted to send an e-mail to TTPD with any suggestions to improve the program.



Appendix A

Sample Technical Qualification Record Report

Department of Energy



Office of Environment, Safety & Health

Technical Qualification Program

Technical Qualification Record

Candidate:

Position: Safety & Occupational Health

Series-Grade: 00018-14

Division/Office: Office of Occupational Safety & Health Policy

The above named candidate has satisfactorily completed the Technical Qualification Program requirements for this position within the Department of Energy.

Technical Qualification Records Completed:

First-Level Supervisor: _____ Date: _____

Second-Level Supervisor: _____ Date: _____

Date Entered TQP: 02/19/1997

Date Completed TQP: _____

Department of Energy
Technical Qualification Program
SUMMARY of EQUIVALENCIES

Office of Occupational Safety & Health Policy

General Technical Base											
Competency Number	Reason	Competency Number	Reason	Competency Number	Reason	Competency Number	Reason	Competency Number	Reason	Competency Number	Reason
1.1	2	1.2	2	1.3	2	2.1	2	2.2	2	2.3	2
2.4	2	2.5	2	3.1	2	3.2	2	3.3	2	3.4	2
3.5	2	4.1	2	5.1	2	5.2	2	5.3	2	5.4	2
5.5	2	5.6	2	6.1	1	7.1	2	7.2	1	8.1	2

Occupational Safety – Primary Functional Area											
Competency Number	Reason	Competency Number	Reason	Competency Number	Reason	Competency Number	Reason	Competency Number	Reason	Competency Number	Reason
1.1	2	1.2	2	1.3	2	1.4	2	1.6	2	1.7	2
1.8	1	1.9	2	1.10	2	1.11	2	1.12	2	1.13	1
1.14	2	1.15	1	2.1	1	2.2	1	2.3	1	2.4	1
2.5	1	3.1	1	3.2	1	3.3	1	4.1	1	4.2	1
4.3	2	4.4	2								

REASONS FOR EQUIVALENCIES

1. Experience
2. Training or Education completed
3. Other (see Justification)

Objective evidence is required
For granting equivalencies.

SIGNATURES

I am satisfied that each equivalency is justified.

Candidate: _____ **Date:** _____
First-Level Supervisor: _____ **Date:** _____
Second-Level Supervisor: _____ **Date:** _____

Department of Energy
Technical Qualification Program
EQUIVALENCY JUSTIFICATIONS

Office of Occupational Safety & Health Policy

General Technical Base	
1.1	Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Officer/NCO Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. Hold certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
1.2	Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Officer/NCO Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. Hold certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
1.3	Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Of Department Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
2.1	Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Officer/NCO Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. Hold certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
2.2	Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Officer/NCO Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. Hold certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
2.3	Took course RAD 115 in 9/96, RAD 118 and RAD 120 on 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Officer/NCO Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. Hold certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
2.4	Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Of Department Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. Certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
2.5	Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Of Department Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).
3.1	Completed EM Environmental Laws and Regulations Course on 7/96, Environmental, Health and Safety Law Course on 10/96, NEPA: Policy, Procedure and Science/Art Course on 4/92, Environmental Policy: Waste Management Course on 6/92 and Environmental Law Course on 4/91. Held the position of Environmental Protection Specialist and Hazardous Waste Coordinator. Hold certifications in Environmental Issues, Asbestos Inspector/Management Planner and have completed the 80 & 40 hour Hazardous Materials /Waste Operations Course.
3.2	Completed EM Environmental Laws and Regulations Course on 7/96, Environmental, Health and Safety Law Course on

Department of Energy
Technical Qualification Program
NEEDED DEVELOPMENTAL ACTIVITIES

Office of Occupational Safety & Health Policy

General Technical Base Functional Area

Competency Number	Developmental Activities	Target Date	Activities Planned/Completed	Date Activities Completed	Approximate Hours*	Evaluation Methods	Evaluation Notes	Evaluation Date	Signature
2.5	3,4,5	12/30/1997	To be including on-the-job training.		40				
5.3	4,5	08/18/1998	To be familiar with OSHA's electrical standards and the hazards associated with electrical installations and equipment. Course is provided by OSHA at UC at San Diego, California, 8/18/97-8/21/97, OSHA 309A (Electrical Standards), no tuition required for Fed. Employees.		32				

Chemical Processing Functional Area

Competency Number	Developmental Activities	Target Date	Activities Planned/Completed	Date Activities Completed	Approximate Hours*	Evaluation Methods	Evaluation Notes	Evaluation Date	Signature
2.7	4,5	05/12/1997	To be familiar with the DOE/OSHA standards and the orders related to natural phenomenal hazards at DOE facilities. Course is provided by OSHA at UC at San Diego, California, OSHA 600 Collateral Duty for Other Federal Agencies, 5/12/97-5/16/97. Tuition is free for Fed. Gov't employees.		40				

* If an activity satisfied multiple competencies, please divide the time appropriately.

Competency Satisfied By:

DEVELOPMENTAL ACTIVITIES

1. Mentoring
2. On-the-Job Training
3. Self-Study
4. Training Course
5. Other

EVALUATION METHODS

1. Course Completion
2. Oral Evaluation
3. Performance Demonstration
4. Written Exam
5. Other

Department of Energy
Technical Qualification Program
SATISFIED COMPETENCIES

Office of Occupational Safety & Health Policy

General Technical Base					
Competency Number	Completion Date	Evaluation Date	Total Hours	Evaluation Methods	Notes
2.1	04/01/1997	04/01/1997	2	4	<p>Took course RAD 115 in 9/96, RAD 118 and RAD 120 in 4/97, Radiation Safety Training on 1/91 and Radiological Safety I - Fundamentals on 1/85, Radiation Protection on 1/84, Nuclear, Biological and Chemical (NBC) School on 10/84 and Unit NBC Defense Officer/NCO Course on 4/81. Served as Radiation Control Officer (RCO)/Coordinator. Hold certifications as a Certified Safety Professional (CSP) from the Board of Certified Safety Professionals (BCSP) and a Certified Safety Manager (CSM) from the World Safety Organization (WSO).</p>

<u>EVALUATION METHODS</u>
<ol style="list-style-type: none"> 1. Course Completion 2. Oral Evaluation 3. Performance Demonstration 4. Written Exam 5. Other

Appendix B

Sample Problem Report

Problem Report

You have not indicated a status for competency 1.5 in the Occupational Safety Standard.

You have multiple status for competency 2.1 in the General Technical Base Standard.

You have not indicated a status for competency 1.1 in the Worker Protection Programs (EH-5) Standard.

You have not indicated a status for competency 2.1 in the Worker Protection Programs (EH-5) Standard.

You have not indicated a status for competency 3.1 in the Worker Protection Programs (EH-5) Standard.

You have not indicated a status for competency 4.1 in the Worker Protection Programs (EH-5) Standard.

You have not indicated a status for competency 5.1 in the Worker Protection Programs (EH-5) Standard.

You have not indicated a status for competency 6.1 in the Worker Protection Programs (EH-5) Standard.

Appendix C

Sample Individual Development Plans

- **IDP Submitted Prior to Supervisor Approval/Disapproval**
- **IDP After Approval Process**

DOE Training

Individual Development Plan

January 27, 1998

Name Daniel SMOOT-WOOD	Title/Position Training Specialist
Organizational Unit Office of Technical Training & Professional Development (EH-74)	GS-00334-14
Division/Office Date 12/18/1984	Site Date 12/18/1990
DOE Date 12/18/1990	Work Phone 301-903-6482

Last Changes Sent 01/27/1998

Last Changes Approved 01/27/1998

Priority	Activity	Description	Cost	Hours	Target Date
Short Range Goal 1 – Increase environmental management knowledge.					
A1	WST103	EM Mixed Waste Short Course	\$0	8.0	03/31/1998
A2	WST108	The Ninth Annual Weapons Complex Waste Mgmt.&Cleanup Decisionmaker's Forum	\$795	24.0	03/31/1998
A3	Non Catalog	CBT – Visual Basics	\$100	10.0	03/31/1998
Short Range Goal 2 – Improve training skills.					
B1	TRG101	ASTD Conference: American Society for Training and Development	\$695	40.0	03/31/1998
B2	TRG103	Instructor Training	\$650	40.0	03/31/1998
B3	TRG110	Workshop for Career Counselors	\$345	16.0	03/31/1998
Short Range Goal 3 – Enhance security knowledge.					
B4	SEC101	Classified Material and Protection Control I	\$0	24.0	03/31/1998
B5	SEC105	Personnel Security Fundamentals (PER-1000)	\$0	16.0	03/31/1998
B6	Non Catalog	OJT/Self Study – Any orders and other existing material.	\$50	5.0	03/31/1998
Long Range Goal 1 – Increase health and safety knowledge.					
C1	SAF104	Fire Protection Training	\$0	4.0	03/31/1998
C2	SAF106	American Industrial Hygiene Conference Expo.	\$760	56.0	03/31/1998
Long Range Goal 2 – Management of Rad Worker Training.					
C3	RAD101	Radiation Worker I	\$0	24.0	03/31/1998
C4	RAD102	Radiation Worker II	\$0	24.0	03/31/1998

Daniel SMOOT-WOOD

Supervisor Approval

DOE Training

Individual Development Plan

January 27, 1998

Name Daniel SMOOT-WOOD	Title/Position Training Specialist
Organizational Unit Office of Technical Training & Professional Development (EH-74)	GS-00334-14
Division/Office Date 12/18/1984	Site Date 12/18/1990
DOE Date 12/18/1990	Work Phone 301-903-6482

Last Changes Sent 01/27/1998

Last Changes Approved 01/27/1998

Priority	Activity	Description	Cost	Hours	Target Date
Short Range Goal 1 – Increase environmental management knowledge.					
A2	WST108	The Ninth Annual Weapons Complex Waste Mgmt.&Cleanup Decisionmaker's Forum	\$795	24.0	03/31/1998
Short Range Goal 2 – Improve training skills.					
B2	TRG103	Instructor Training	\$650	40.0	03/31/1998
B3	TRG110	Workshop for Career Counselors	\$345	16.0	03/31/1998
Short Range Goal 3 – Enhance security knowledge.					
B4	SEC101	Classified Material and Protection Control I	\$0	24.0	03/31/1998
B5	SEC105	Personnel Security Fundamentals (PER-1000)	\$0	16.0	03/31/1998
B6	Non Catalog	OJT/Self Study – Any orders and other existing material.	\$50	5.0	03/31/1998
Long Range Goal 1 – Increase health and safety knowledge.					
C2	SAF106	American Industrial Hygiene Conference Expo.	\$760	56.0	03/31/1998
Long Range Goal 2 – Management of Rad Worker Training.					
C4	RAD102	Radiation Worker II	\$0	24.0	03/31/1998
<p>The following activities were not approved by your supervisor:</p> <ul style="list-style-type: none"> RAD101 – Radiation Worker I SAF104 – Fire Protection Training TRG101 – ASTD Conference: American Society for Training and Development WST103 – EM Mixed Waste Short Course 					

Daniel SMOOT-WOOD

Supervisor Approval