

# Member Competency Currency & Tracking Report How To Guide

This guide will demonstrate how to track your competencies, the currency tasks involved in maintaining them. This guide will cover the following topics show you how to...

- Customize any of the tracking reports to so view only your information.
- Save your customized report to your report folder so you can access it at any time.
- Correctly and quickly interpret your report(s) so that you can ensure that your currency tasks are always up to date

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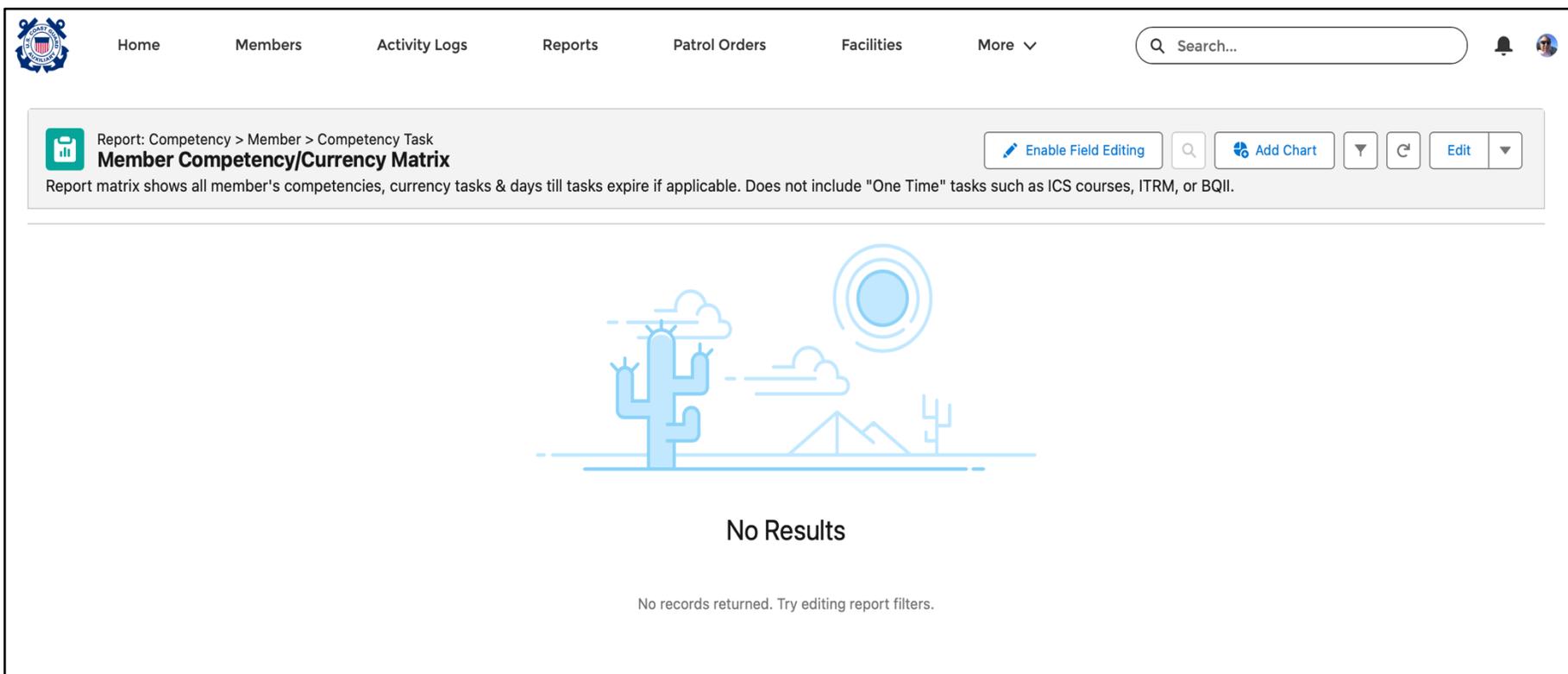
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# Customizing, Saving, and Locating Your Personalized Report

**Take Note** For this section we've chosen the Member Competency & Currency Matrix Report as the example dashboard report, however the following processes in this section can be used to duplicate & customize any of the currency tracking reports.

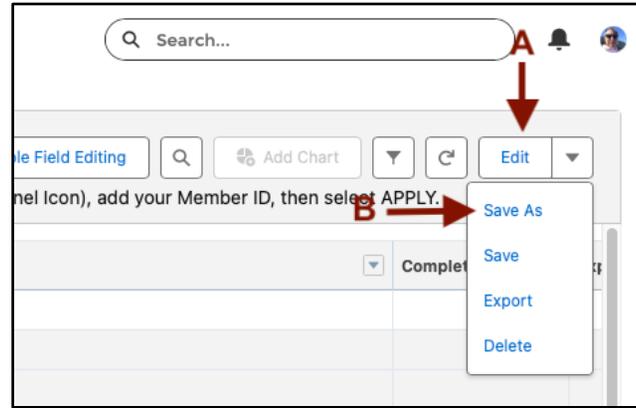
## Step 1: Accessing & Saving Your Customized Report

The first step is to access the report by selecting the report link you want to view from the Competency & Currency Reports & Tracking page. These reports do require you to be logged into AUXDATA II(AD2), so if you are not already logged in, you will be asked to do so. Once logged in, you will be directed to the selected report and it will appear displaying "No Results" which is expected as this report is just a template that needs to be customized.



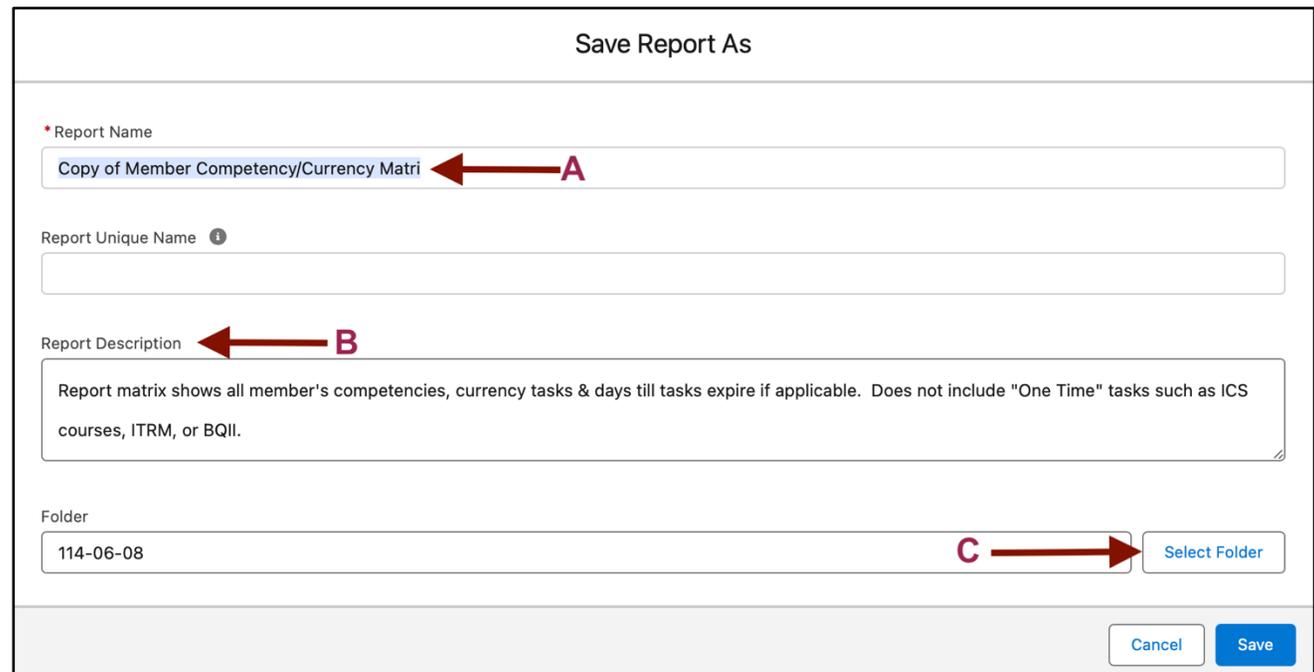
Before we customize your report for you to display only your data, let's duplicate it by saving it to your Private Reports Folder, so that you'll have access to it any time you need it.

1. Open the Save As dialog box by clicking on the (A) **Edit** pulldown menu and selecting (B) **Save As**. This will launch the "Save As" dialog box



2. From the "Save As" dialog box....

- A. Highlight the **Report Name** and replace it with whatever you'd like to name this report, E.G. "My Competency & Currency Report ". The **Report Unique Name** will update automatically based on what you entered for the **Report Name**
- B. The Report Description can stay as is, or you can change it to anything you'd like
- C. Next you'll need to select a folder to save this to. Click on the **Select Folder** button and that will launch the "Select Folder" dialog box.

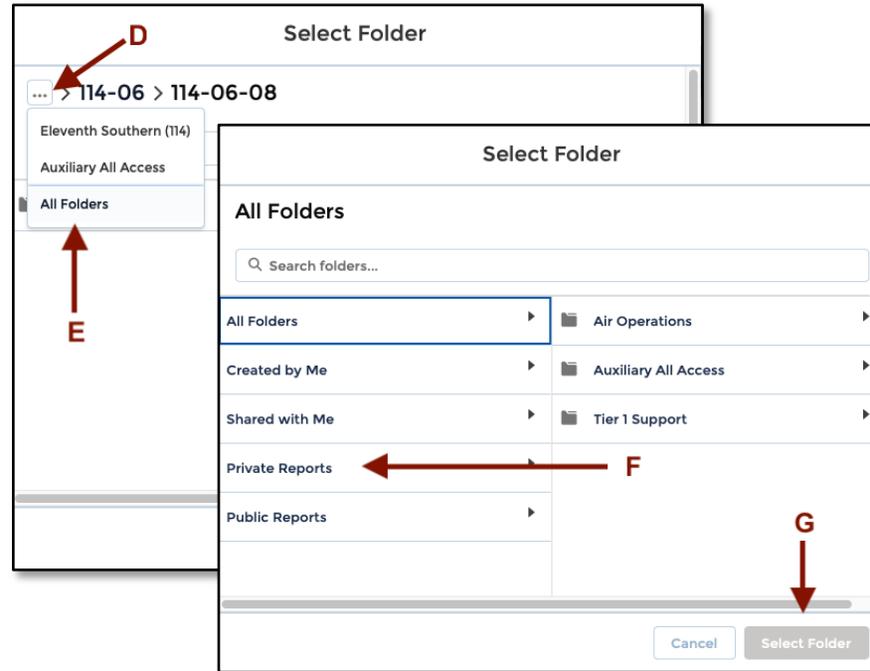
A screenshot of a 'Save Report As' dialog box. The title bar says 'Save Report As'. There are three main input fields: 'Report Name', 'Report Unique Name', and 'Report Description'. The 'Report Name' field contains the text 'Copy of Member Competency/Currency Matri' and is highlighted in blue. A red arrow labeled 'A' points to this field. The 'Report Description' field contains the text 'Report matrix shows all member's competencies, currency tasks & days till tasks expire if applicable. Does not include "One Time" tasks such as ICS courses, ITRM, or BQII.' and is also highlighted in blue. A red arrow labeled 'B' points to this field. Below these fields is a 'Folder' field containing the text '114-06-08'. A red arrow labeled 'C' points to a 'Select Folder' button to the right of this field. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

D. From the “Select Folder” dialog box, click on the More Menu, indicated by “...”.

E. Then select **All Folders**

F. From the **All Folders** menu, select **Private Reports**

G. Then click **Select Folder**.



H. After selecting the Private Folder you’ll be brought back to the “Save Report As” dialog box. Select **Save** and report will be redisplayed and saved to your Private Reports Folder

Save Report As

Report Name  
My Competency & Currency Matrix

Report Unique Name ⓘ  
My\_Competency\_Currency\_Matrix\_JEx

Report Description  
Report matrix shows all member's competencies, currency tasks & days till tasks expire if applicable. Does not include "One Time" tasks such as ICS courses, ITRM, or BQII.

Folder  
Private Reports Select Folder

Cancel Save

## Step 2: Customizing Your Report

Now that you've saved your report, we're going to customize the report to just focus on only your records. Each of the Dashboard Reports will have instructions on which field(s) to be update to display only your information.

Report: Competency > Member > Competency Task  
**My Competency & Currency Matrix**

You must update the "MEMBER ID" field in the "FILTERS" window... Select FILTERS(Funnel Icon), add your ID, then select APPLY. Matrix shows competencies, currency tasks & more. Does not include "One Time" t...

Enable Field Editing

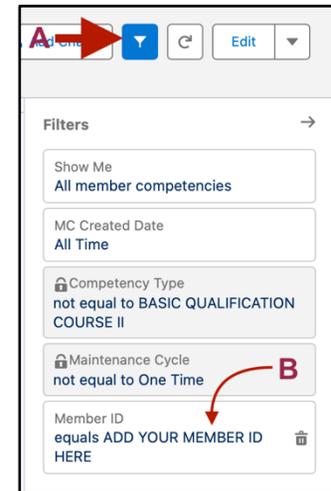
Add Chart

Edit

Please note that not all reports will use the same filter fields. For this section we will be using the Competency & Currency Report as the sample report.

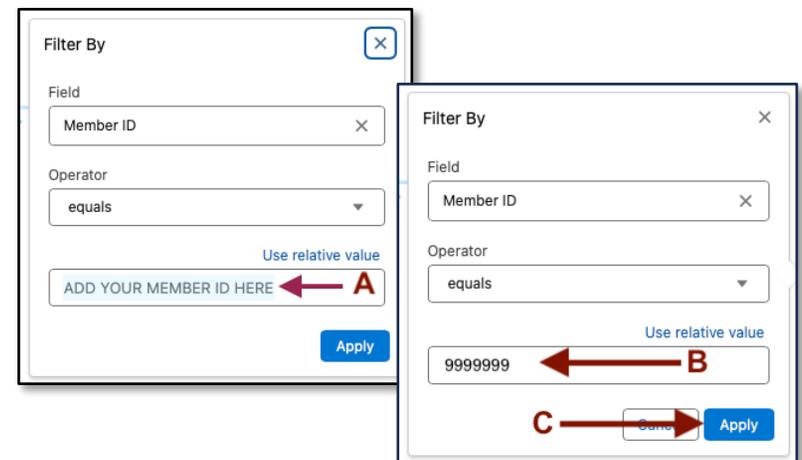
1. Customize the report by updating the Member ID with your Member ID...

- In the upper right hand corner, click on the "Filters" icon which is shaped like a funnel, and the Filters dialog box will open.
- From the Filters dialog box, go to the last filter in the list, "Member ID" and select the link "equals ADD YOUR MEMBER ID HERE"



2. After selecting the Member ID field value, the Field Dialog box will appear.

- Highlight "ADD YOUR MEMBER ID HERE".
- Enter your Member ID
- Select **Apply**



3. Once you've selected Apply, your report will render displaying all your competencies regardless of status, along with all the associated Competency Tasks that are required to keep your competency current and up to date.

Report: Competency > Member > Competency Task  
**My Member Competency/Currency Matrix**

You must update the "MEMBER ID" field in the "FILTERS" window... Select FILTERS(Funnel Icon), add your ID, then select APPLY. Matrix shows competencies, currency tasks & more. Does not include "One Time" t...

<input type="checkbox"/> Last/First Name ↑	Competency Type ↑	Compet...	MCT Record	Task Type as Text	Ta...	Task Last Completed	Task Next Due
<input type="checkbox"/> DOE, JOHN	AID TO NAVIGATION VERIFIER - PQS	Archived	-			-	-
	<b>Subtotal</b>						
	<b>Subtotal</b>						
	AUXCT - CORE TRAINING	Certified	MCT-1197638	CIVIL RIGHTS AWARENESS (502319)	■	1/11/2024	12/31/2029
			MCT-1208777	PRIVACY AWARENESS (810015)	■	1/11/2024	12/31/2029
			MCT-1229431	SECURITY EDUCATION AND TRAINING AWARENESS (810030)	■	1/9/2024	12/31/2029
			MCT-1250737	SEXUAL HARASSMENT PREVENTION COURSE (810000)	■	1/11/2024	12/31/2029
			MCT-1715705	SEXUAL ASSAULT PREVENTION RESPONSE AND RECOVERY (502379)	■	1/9/2024	12/31/2029
			MCT-1746124	SUICIDE PREVENTION (100643)	■	9/11/2024	12/31/2029
	<b>Subtotal</b>						
	<b>Subtotal</b>						
	BOAT CREW CREWMEMBER	Certified	MCT-1464565	ANNUAL RISK MGMT TCT REFRESHER TRAINING	■	5/23/2024	8/31/2025
			MCT-1526239	(BCM) ANNUAL DAY TASKS	■	8/30/2024	12/31/2025
			MCT-1531189	(BCM) ANNUAL NIGHT TASKS	■	-	-
			MCT-1536139	(BCM) ANNUAL NIGHT L/H/HOURS	■	-	-

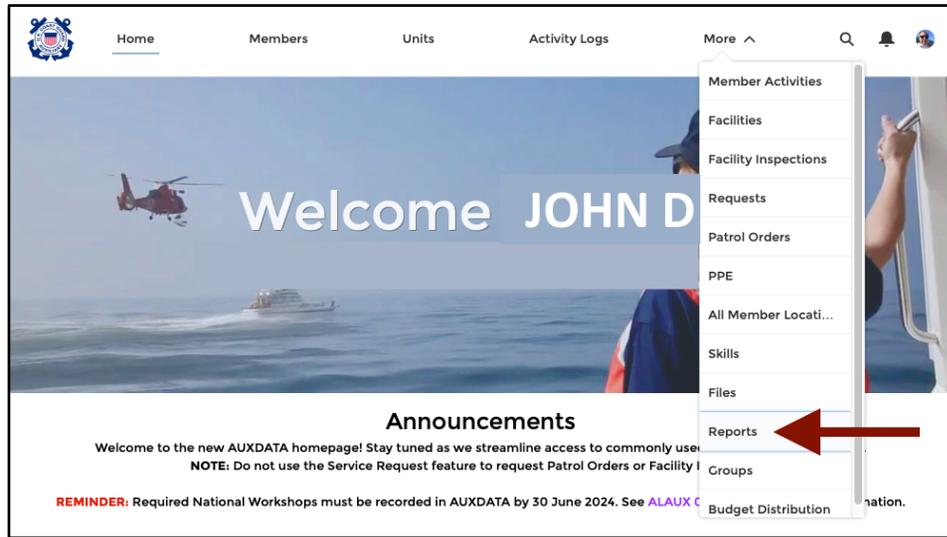
Row Counts  Detail Rows  Subtotals  Grand Total

**Take Note** The "Subtotals" toggle may be switched on in order to separate each competency so the report is easier to read. This can be toggled off at any time without affecting the outcome of the report.

Once the report renders, you can click on the Filter Icon again to close the Filters dialog box which will provide you more area to view the report.

### Step 3: Locating your Customized Report

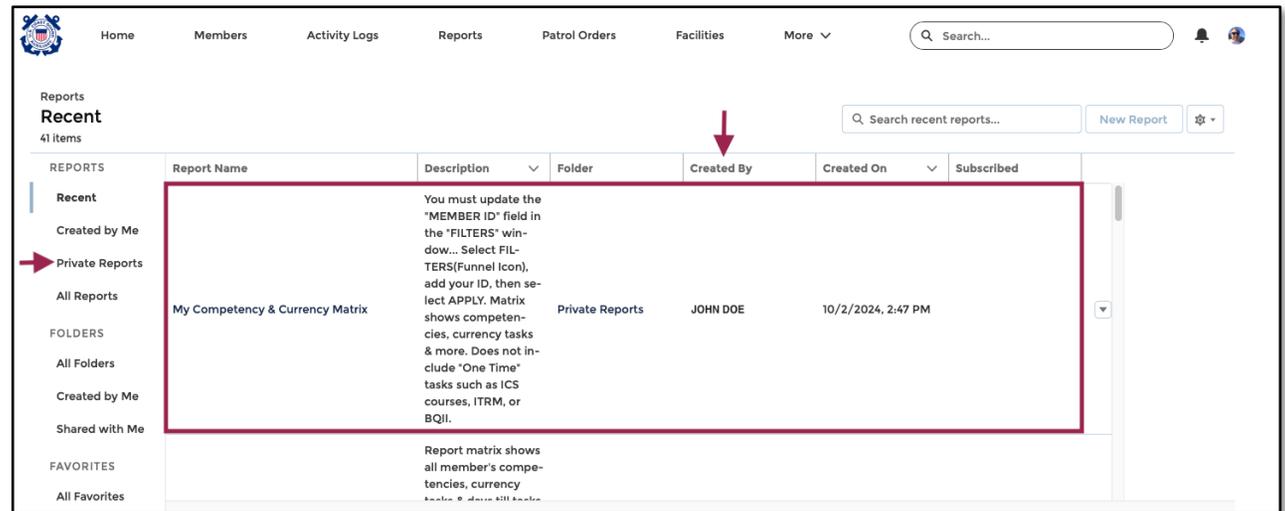
To locate your newly saved report, from the main navigation menu bar, select **More**, then **Reports**



Once selected, the reports page will appear and will default to the **Recent** page. If you haven't used any other report since you ran this one, it will appear at the top of the list. You can alternatively select your Private Reports folder to find it as well.



If you do not see it right away, select the **Created On** column header to resort by create date and the report should come to the top of the list



A more efficient way to reference your report in the future is to *bookmark* your customized report in your web browser. Since the report URLs in AD2 do not change, the bookmarked report will always be there. You just need to log into AD2 and it will be at your fingertips. To bookmark the report's URL, please refer to your specific web browser's documentation on how to do so.

# The Competency & Currency Matrix Report

## 1: Report Overview

The purpose of this report is to gather all your required currency tasks for each of your competencies into a one report so that you can review your currency status at any time and know exactly where you stand and what is still required to maintain currency for each of your competencies. These tasks include, but not limited to: required hours; required missions(# of VSCs or RBS visits); required PQS tasks; annual workshops; TCT where applicable; etc.

**NOTE: This report will not show competencies without currency tasks like BQII, nor will it display one-time tasks like ITRM or ICS courses that were originally required to obtain the competency.**

## 2: Report Layout

This matrix report shows quite a bit of information which is shown over two screens and viewable by using the bottom scroll bar. The first half displays the high level, “need to know” data for each of the competencies and their associated tasks....

Last/First Name	Competency Type	Compet...	MCT Record	Task Type as Text	Task Last Completed	Task Next Due
DOE, JOHN	AID TO NAVIGATION VERIFIER - PQS	Archived	-		-	-
	<b>Subtotal</b>					
	AUXCT - CORE TRAINING	Certified	MCT-1197638	CIVIL RIGHTS AWARENESS (502319)	1/11/2024	12/31/2029
			MCT-1208777	PRIVACY AWARENESS (810015)	1/11/2024	12/31/2029
			MCT-1229431	SECURITY EDUCATION AND TRAINING AWARENESS (810030)	1/9/2024	12/31/2029
			MCT-1250737	SEXUAL HARASSMENT PREVENTION COURSE (810000)	1/11/2024	12/31/2029
			MCT-1715705	SEXUAL ASSAULT PREVENTION RESPONSE AND RECOVERY (502379)	1/9/2024	12/31/2029
			MCT-1746124	SUICIDE PREVENTION (100643)	9/11/2024	12/31/2029

Column Heading	Description
Last/First Name	Your Name
Competency Type	This is any competency that you ever held
Competency Status	The status of your competency... Certified, Admin, REWK, REYR, etc. For a complete list of statuses, please see the <a href="#">Appendix A-1</a> .

<b>Member Competency Task Record Number</b>	Each of these individual records align with a required task for the competency to remain current. All pertinent task info is displayed in the matrix, however for certain tasks the MTC will show previous task history.
<b>Task Type</b>	Description of the required task
<b>Task Status Color</b>	<b>Green</b> = Completed. <b>Yellow</b> = In Progress. <b>Red</b> = Incomplete/Overdue/Expired
<b>Task Last Completed</b>	Indicates when the task was last completed. This field is not applicable for tasks with Maintenance Cycles of <i>Progressive</i>
<b>Task Next Due</b>	Indicates when the next time the task needs to be completed by or when it is considered to be expired.

Scrolling to the right you will see more detailed information about each task displaying how often it's required, days till due, etc....

Report: Competency > Member > Competency Task  
**My Member Competency/Currency Matrix**  
 You must update the "MEMBER ID" field in the "FILTERS" window... Select FILTERS(Funnel Icon), add your ID, then select APPLY. Matrix shows competencies, currency tasks & more. Does not include "One Time" t...

Last/First Name	Competency Type	Compet...	Task Last Completed	Task Next Due	Days Until Due	Maintenance Cycle	Cycle Requirement	Currency Units
DOE, JOHN	AID TO NAVIGATION VERIFIER - PQS	Archived	-	-	-	-	-	-
	<b>Subtotal</b>				0		0	0.00
	<b>Subtotal</b>				0		0	0.00
	AUXCT - CORE TRAINING	Certified	1/11/2024	12/31/2029	1,907	Annual	0	0.00
			1/11/2024	12/31/2029	1,907	Annual	0	0.00
			1/9/2024	12/31/2029	1,907	Annual	0	0.00
			1/11/2024	12/31/2029	1,907	Annual	0	0.00
			1/9/2024	12/31/2029	1,907	Annual	0	0.00
			9/11/2024	12/31/2029	1,907	Annual	0	0.00

Column Heading	Description
<b>Day Until Due</b>	Indicates how many days are left for from time the report was ran until the Task Next Due date
<b>Maintenance Cycle</b>	How often this task is required: Annual, Once Per CY, Progressive, Sliding End of Month, Workshop, or "-". See <a href="#">Appendix A-2</a> for further information
<b>Cycle Requirement</b>	This only refers to tasks with a cycle of <i>Progressive</i> and indicates how many of the units are required for completion, e.g. # of hours, # of days, # of RBS visits, # or VSC exams, etc
<b>Currency Units</b>	This only refers to tasks with a cycle of <i>Progressive</i> and indicates how many of the units have been completed thus far at the time the report was ran, e.g. # of hours, # of days, # of RBS visits, # or VSC exams, etc

### 3: Interpreting and Reviewing Report Data

#### Sample Competency Sections

##### Sample 1 - AUXCT Competency

For our first example let's look at the report which was ran in October of 2024, and we'll review the AUXCT Competency....

Report: Competency > Member > Competency Task						
My Member Competency/Currency Matrix						
You must update the "MEMBER ID" field in the "FILTERS" window... Select FILTERS(Funnel Icon), add your ID, then select APPLY. Matrix shows competencies, currency tasks & more. Does not include "One Time" t...						
Last/First Name	Competency Type	Competency Status	MCT Record	Task Type as Text	Task Status Color	Tas
<input type="checkbox"/> FIORILLO, STEVEN	AID TO NAVIGATION VERIFIER - PQS	Archived	-			
	Subtotal					
	AUXCT - CORE TRAINING	Certified	MCT-1197638	CIVIL RIGHTS AWARENESS (502319)	■	
			MCT-1208777	PRIVACY AWARENESS (810015)	■	
			MCT-1229431	SECURITY EDUCATION AND TRAINING AWARENESS (810030)	■	
			MCT-1250737	SEXUAL HARASSMENT PREVENTION COURSE (810000)	■	
			MCT-1715705	SEXUAL ASSAULT PREVENTION RESPONSE AND RECOVERY (502379)	■	
			MCT-1746124	SUICIDE PREVENTION (100643)	■	

Reviewing this member's record, we can see that there are 6 tasks, all of which are current indicated by the green Task Status column. If you scroll to the right will then see these tasks are not due for renewal by(or expire on) 12/31/2029.

Report: Competency > Member > Competency Task								
My Member Competency/Currency Matrix								
You must update the "MEMBER ID" field in the "FILTERS" window... Select FILTERS(Funnel Icon), add your ID, then select APPLY. Matrix shows competencies, currency tasks & more. Does not include "One Time" t...								
Last/First Name	Competency Type	Competency Status	Task Status Color	Task Last Completed	Task Next Due	Days Until Due	Maintenance Cycle	Cyc
<input type="checkbox"/> FIORILLO, STEVEN	AID TO NAVIGATION VERIFIER - PQS	Archived		-	-	-	-	
	Subtotal					0		
	Subtotal					0		
	AUXCT - CORE TRAINING	Certified	■	1/11/2024	12/31/2029	1,907	Annual	
			■	1/11/2024	12/31/2029	1,907	Annual	
			■	1/9/2024	12/31/2029	1,907	Annual	
			■	1/11/2024	12/31/2029	1,907	Annual	
			■	1/9/2024	12/31/2029	1,907	Annual	
			■	9/11/2024	12/31/2029	1,907	Annual	

So looking at this section of the report, this member's AUXCT competency per the run date is up to date and current, and there is no need to look into this section any further.

## Sample 2 - BCM Competency

For our second sample report, which again was ran in October 2024, let's take a look at the Boat Crew Member(BCM) competency. In this member's case the competency is in REYR status, meaning the required tasks were not met for the current year.

As we review this section, we can most likely determine why this member is in REYR for BCM simply by looking for the red Task Status icon.

Competency Type ↑	Compet...	MCT Record	Task Type as Text	Ta...	Task Last Completed	Task Next Due
BOAT CREW CREWMEMBER	REYR	MCT-1463877	ANNUAL RISK MGMT TCT REFRESHER TRAINING	■	4/25/2024	7/31/2025
		MCT-1525550	(BCM) ANNUAL DAY TASKS	■	10/21/2022	12/31/2024
		MCT-1530500	(BCM) ANNUAL NIGHT TASKS	■	-	-
		MCT-1535450	(BCM) ANNUAL NIGHT U/W HOURS	■	-	-
		MCT-1547638	QE APPROVAL CREW	■	10/21/2022	12/31/2025
		MCT-1555292	BOAT CREWMEMBER U/W HOURS	■	-	12/31/2024
		MCT-1562946	OPERATIONS WORKSHOP	■	4/29/2024	12/31/2024

So as we examine each of the tasks, we can see that the "(BCM) ANNUAL DAY TASKS" is in the red. We can also see that the Task Last Completed date was in 2022, and the current Task Next Due date is 2024, which indicates that there was no activity in 2023 meaning this task was not completed in time and is most likely the reason for the REYR status.

Other things to note for this competency...

- The tasks *(BCM) ANNUAL NIGHT TASKS* & *(BCM) ANNUAL NIGHT U/W HOURS* have a Task Status of green, even though there are dashes in both the Task Last Completed & Task Next Due columns. This most likely means that the member is not "Night Certified", therefore these tasks are N/A and are not required to maintain their Day Time currency.
- The task *BOAT CREWMEMBER U/W HOURS* has a status of yellow, which indicates that this is a Progressive task and its completion will progress throughout the year until the requirement is met. If you scroll to the right, you will see that this is a Progressive task, along with the Cycle Requirement being "12", which means the member must complete at least 12 hours of underway time to complete this task.

Ta...	Task Last Completed	Task Next Due	Days Until Due	Maintenance Cycle	Cycle Requirement	Currency Units
■	-	12/31/2024	89	Progressive	12	0.00

You can also see that the Currency Units is "0" which means no hours have been completed towards this task. Once this column reads 12, then the task will be completed and the status will turn green. Because it is possible to correct the cause of the REYR for 2024 by completing the needed task(s), the Task Next Due date for this task is still 12/31/2024.

# Appendix - Reference

## A-1: Competency Statuses

Status	Description
<b>Admin</b>	There is some administrative action that is required by your competency that has not been met. In most cases this refers to a scheduled event that has not occurred. For example, in the case of Operations, if your PPE has been inspected by its Inspection due date, then your operational competency (PWC, BCM, Coxswain, etc) will be placed into ADMIN status
<b>Archive</b>	The member has requested that they would no longer like to keep this competency current. This will also occur if a competency has been in an REYR status for several years. NOTE: If the member desires to reinstate themselves in the competency, then they must re-certify from scratch.
<b>Certified</b>	Indicates that the member has kept up on previous currency requirements and is certified to perform mission within said competency.
<b>Not Certified- Trainee</b>	Indicates person who is in training for the competency. Not all competencies support this status
<b>REWK</b>	Indicates Required Workshop has not been completed by 6/30/CY. If a competency is in this status, the member has not lost their certification, however they cannot perform any competency tasks until the workshop is completed. Once completed they must notify their FSO-IS as this status must be updated manually.
<b>REYR</b>	Indicates Required Yearly Currency Tasks have not been completed by 12/31 of the previous year. If a competency is in this status then the member lost their certification & cannot perform any competency tasks until the currency requirements are met. Once completed they must notify their FSO-IS as this status must be updated manually. NOTE: Each competency has different recertification rules, so please check with the competency's FSO or FSO-MT for recertification requirements
<b>REYR – CHECK FLIGHT</b>	Has not met annual currency requirements for aviation competency
<b>Superseded by Higher Competency</b>	Certain competencies are pre-req requirements or sub-components for advanced competencies. For example, BCM is a pre-req for Coxswain, so a Coxswain will have this status for their BCM competency.

## A-2: Maintenance Cycles

Status	Description
Annual	Not every year but on an annual basis, so the basis may be every 3 years, 5 years, etc.
Once Per CY	Once per Calendar Year
Progressive	The completion progresses through the year until the objective is met.
Sliding End of Month	Needs to be completed over a sliding scale based on last completion date, e.g. Every 15 months
Workshop	Competency workshop completed by June 30 <sup>th</sup> of current year or competency status will be REWK. If not completed by end of current year competency status will become REYR
“-“	Not Applicable