

DIR Customer Portal

IRM CPE Application Instructions

Contents

Overview of IRM Continuing Professional Education (CPE).....	1
General Instructions.....	2
Logging in the First Time	2
Logging in After Setup Complete	3
Forgot Your Password?	3
IRM CPE Reporting System Overview	3
CPE Summary Page	4
Submitting a CPE Event.....	5
My CPE Events (Reviewing Your Submitted Events).....	6
Appendix A - IRM CPE Submission Tips.....	7

Overview of IRM Continuing Professional Education (CPE)

The Information Resources Management Act directs the Texas Department of Information Resources (DIR) to establish mandatory initial and continuing education requirements for Information Resources Managers (IRMs) of state agencies and institutions of higher education.

To meet the program requirements, each IRM must

1. Earn a minimum number of continuing education hours in core knowledge areas each fiscal year.
2. Complete a set of one-time required topics within two years of being designated an IRM.
3. Report continuing education hours completed to DIR by August 31 each fiscal year.

Texas IRMs are required to report the completion of qualified education to DIR by August 31 of each year via DIR's online portal. This document explains how to use that portal – the IRM CPE Application.

Reference

- [IRM Continuing Education Guide](#)
- [Overview of IRM Continuing Education \(DIR webpage\)](#)
- [IRM Continuing Education FAQs](#)
- [Report IRM CPE hours via the Online Application](#)

For questions about the IRM Continuing Education program, contact the IRM Coordinator.

For technical assistance with this application, please email DIRCPAdmin@dir.texas.gov.

General Instructions

DIR emails initial user credential to each IRM when they are established in the DIR systems.

Your **Username** will be your email address and is stated in the initial *Welcome* email.

Instructions below explain how to add a password of your choosing. Subsequent logins will require this Username and password.

After the initial login, IRMs can use **Forgot Password** to reset the password if needed.

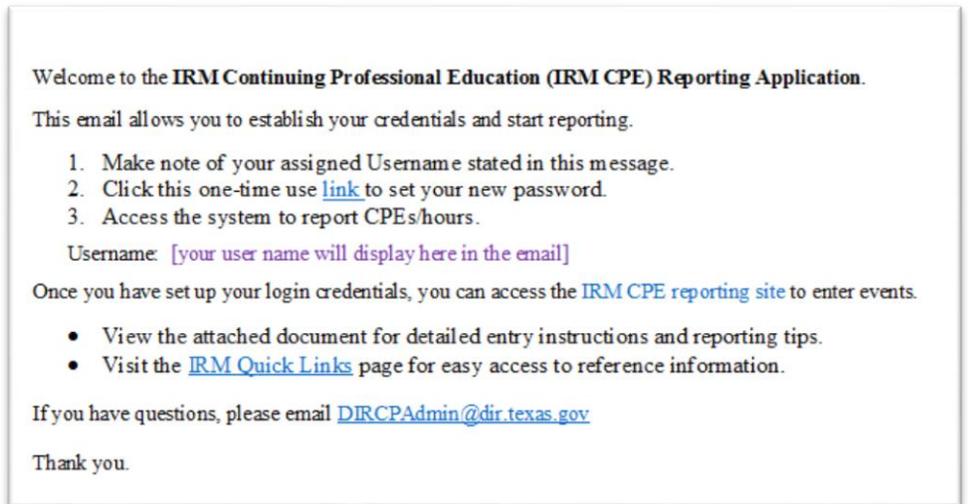
If you need technical assistance with the CPE reporting system, please email DIRCPAdmin@dir.texas.gov.

Logging in the First Time

You should have received an email similar to the one shown in Picture 1.

It provides your **Username** and the initial one-time link to the application to establish your password.

Picture 2 Change Password Screen



Picture 1 Welcome Email

Click on the link from the email to create a new password.

In the **Change Password** dialog box (Picture 2), key your new password and repeat in the confirmation field.

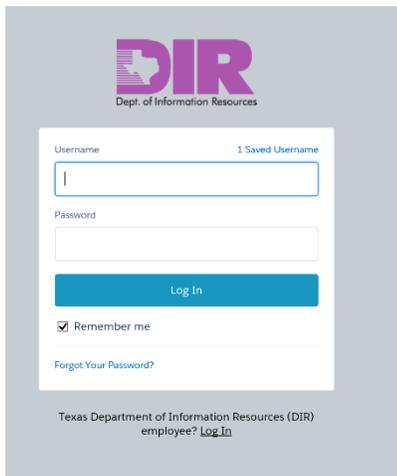
Once password is verified, click the **Change Password** button

Logging in After Setup Complete

Visit the [IRM CPE Reporting Application](#) to submit event records.

After initial setup, logins will only require keying your Username and established password. See Picture 3.

If you click the **Remember Me** checkbox below the login button, the system will remember your ID but you must still enter your Password.



Picture 3 Login Screen

Forgot Your Password?

If you have forgotten your password, click the **Forgot Your Password** Link on the login screen.

After entering your Username the system will send a re-set link to the email associated with your IRM account.

USERNAME REMINDER
Your Username is your email address

IRM CPE Reporting System Overview

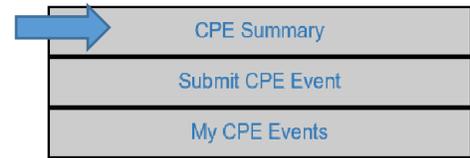
The reporting application consists of:

1. Summary page displaying basic contact information and CPE status
2. CPE Submission form for entering events
3. My CPE Events which display a list of all events submitted and the ability to export records

CPE Summary Page

The **CPE Summary** page displays the IRM's current CPE information. From this screen, you will be able to:

- Review contact information
- View CPE Hours Earned Year-to-Date
- Review your status of Required Topics
- Log out (Top Right Corner of Black Banner)



IRM Information and CPE Summary

Allan Martin

Organization: DIR Dev
 Organization Code: 313007
 Email: allan.martin@dir.texas.gov
 IRM Type: Joint, Primary
 IRM Level: Level 3

ID: IRM-07850
 Phone:
 Designation Date: 2015-05-12
 Effective Date: 2015-05-12

Notify DIR representative if contact information needs to be updated

Status of Yearly CPE Hours for Fiscal Year 2016

CPE Hours Needed by 8/31:		18.0
CPE Hours Reported:	28.0	26.0
Category A (Attendee):	28.0	
Category B (Presenter):	0.0	
CPE Hours Lacking:		0.0

Category B hours are limited to 25% of Total CPE Hours for Year

Status of One-Time Required Topics
 Cumulative as of 2016-05-18

Are All Required Topics Complete?

Per System Calculations:	No
Per DIR Manual Review:	No

See below for list of required topics and date range in which CPEs should be earned.

Required Topic CPEs	Needed	Earned to Date	Earned by Deadline	Begin Date	End Date	Complete?
RT1. Strategic Planning	3.0	0.0	0.0	2014-05-12	2017-05-11	No
RT2. Communication	0.0	2.0	2.0	2014-05-12	2017-05-11	Yes
RT3. Business Value of IT	3.0	0.0	0.0	2014-05-12	2017-05-11	No
RT4. Quality Assurance	0.0	0.0	0.0	2014-05-12	2017-05-11	Yes
RT5. Contracting	3.0	0.0	0.0	2014-05-12	2017-05-11	No
RT6. Security	3.0	3.0	3.0	2014-05-12	2017-05-11	Yes
RT7. BCP/DR	3.0	0.0	0.0	2014-05-12	2017-05-11	No
RT8. Tech Skillset (Training)	0.0	8.0	8.0	2014-05-12	2017-05-11	Yes

Picture 4 CPE Summary Screen

The **Required Topics Summary** includes information on hours needed and what has been earned. If the topic has been completed, YES will display in the **Complete?** column.

You cannot directly edit this page; however, as events are added, the values will update automatically.

Contact the IRM Coordinator at DIR to make changes to your profile (contact information).

Submitting a CPE Event

Submit events via this screen.

- Enter event details.
- Add **Knowledge Area** CPE Hours
- If applicable, indicate **One Time Required Topic (RT)** hours
 - Note: RT hours must be less than or equal to Knowledge Area hours on same row.
- Click **Submit** Button to complete the process.
- **Watch for a popup message noting successful submission** (Picture 6)
- See [Appendix A](#) - **IRM CPE Submission Tips** and/or the onscreen **Help** button for additional information.



DIR
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Logout

CPE Summary
Submit CPE Event
My CPE Events

Help

IRM CPE Event Entry

Fields marked with an * are required.

Event Name*

Event Type

Event Category

Sponsor*

City*

State*

Description

Begin Date* End Date*

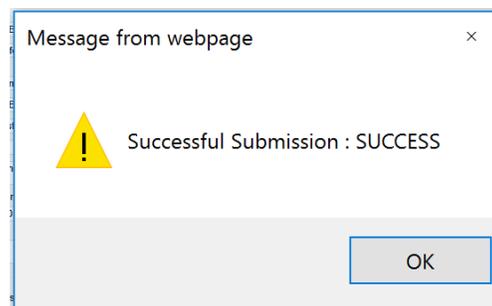
Comments

Note: Key CPEs (hours) in full or half hour increments using decimal format. (Example: 1, 1.0, 1.5)

Knowledge Area (KA)	One-Time Required Topics (RT)
KA1. Strategic Planning and Policy Issues <input type="text"/>	RT1. Strategic Planning <input type="text"/>
KA2. Managerial and Leadership Competencies <input type="text"/>	RT2. Communication of Technical Information <input type="text"/>
KA3. IT Performance Assessment <input type="text"/>	RT3. Measuring the Business Value of IT <input type="text"/>
KA4. Project/Program Management <input type="text"/>	RT4. Quality Assurance or Risk Management <input type="text"/>
KA5. Capital Planning, Investment, Contracting <input type="text"/>	RT5. Contract Negotiation/Management <input type="text"/>
KA6. Cybersecurity/Information Assurance <input type="text"/>	RT6. IRM Role in Cybersecurity/Information Assurance <input type="text"/>
KA7. IT Controls <input type="text"/>	RT7. Business Continuity / Disaster Recovery <input type="text"/>
KA8. IT Topics and Trends <input type="text"/>	RT8. Training (Ensure tech expertise) <input type="text"/>

Submit

Picture 5 IRM CPE Event Entry

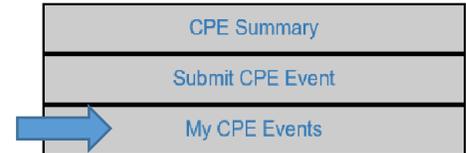


Picture 6 Success Submission Message

My CPE Events (Reviewing Your Submitted Events)

From this screen (Picture 7) you will be able to:

- View completed CPE Events
- Export records to Excel (to the right, about columns K7 and K8)
- Log out (Top Right Corner of Black Banner)



IRM CPE Event Records

test2 agency
DIR test2

Excel Export

EventName	Event Type	Event Category	Begin Date	End Date	Total CPE Hours	Presenting Hours	K1 GPP	K2 Mgt/Ldr	K3 IT-Perf	K4 PM	K5 IT-Op/ops	K6 CyberSec	K7 BCPDR	K8 Tech	RT1 StratPlan	RT2 Comm	RT3 Risk Value	RT4 Risk/OA	RT5 Contract	RT6 Security	RT7 BCP
SSDW Interactive	Conference	Attending	2018-05-24	2018-05-24	2.0	0.0									2.0						
TASSCC	Conference	Presenting	2018-05-22	2018-05-22	3.0	3.0									3.0						

Picture 7 My CPE Events

Appendix A - IRM CPE Submission Tips

Please visit the IRM area of the [DIR website](#) to review details of the IRM continuing education requirements.

General

- Submit each event attended as a record.
- Each Continuing Professional Education (CPE) unit equals one clock hour. The terms “CPE” and “hour” are used interchangeably.
- STATE field is required and should be 2 characters.
- If attending an international event, key location in CITY field and NA in STATE
- Dates must be today or earlier. Cannot enter future events.
- DESCRIPTION is optional. Most event titles are self-explanatory. Only enter a description if more information or a clarification is needed.
- COMMENTS field is for administrative notes directed at DIR staff. (Rarely used.)
 - Do not use to request for an ACTION (e.g., “Delete previous entry”). Individual entries are not reviewed at that level.

Presenter Hours

- Presenter hours must be submitted as a separate entry. (If you presented at a conference you were attending, submit as two records.)
- Presenter hours are limited to 25% of the total yearly hours needed.
- See *IRM Continuing Education Guide* for details on what can be claimed.

Mapping Hours from an Event

- Calculate the number of CPEs (hours) being claimed and assign to one or more Knowledge Areas (KA).
- Round CPEs to the nearest half hour.
- Once an IRM has satisfied the one-time Required Topics (RT), entering any further RT hours in that section is optional.
- Required Topic (RT) hours are a subset of Knowledge Area (KA) hours.
 - If Required Topic entered, the quantity must be less than or equal to its Knowledge Area hours.

Successful Submission

- Be sure to hit the SUBMIT button when finished with entry. A pop-up message will confirm that the submission was successful.

If you need additional assistance understanding the program, contact the DIR coordinator.

For technical assistance with the IRM CPE Application, please email DIRCPAdmin@dir.texas.gov.