**D11sr OPTREX Guidelines**.

D11SR is changing the mechanism it uses for Crew & Coxswain Qualification and Re-Qualification. This year the process will be conducted in an OPTREX Format. This will provide benefits for the Divisions, Flotilla’s and the members. The change allows for the coordination of training at division and flotilla level for members as they prepare for their Check-Ride and for more in-depth training and review.

Planning, Communication and Team Work are essential for the successful outcome of the member training and the OPTREX. The Communication Chain is from the Schedulers (Michael Bozarth and Robert McKoy) to the DSO-OP’s. They should communicate with the DSO-MT the SO-OP’s, SO-MT the FC, FSO-OP, FSO-MT and the FSO-IS.

**To facilitate the scheduling of QE’s we need the following from each Division SO-OP;**

Preliminary Count - Due 40 days prior to your OPTREX.

This is an estimate of how many participants you expect for initial and requalification Check-Rides. Also, we need to know the names of the Facilities and the Coxswains you expect to participate. This information is used to determine how many Qualification Examiners we will needed in time to get travel orders.

QE Request Form - Due 30 days prior to your OPTREX.

The QE request form is attached. All members participating should be listed on one form. Submissions that do not include all necessary information will be returned. Make additional pages if needed.

Last day to add candidates - 10 days prior to the OPTREX

Occasionally we get last minute requests to participate in an OPTREX. This is OK if the candidate has met all the prerequisites, if all their prerequisites have been entered in AUXDATA and there are adequate QE’s, facilities and time they may be added. Missing any one item will require the candidate to find another OPTREX. Candidates that signed up on time will have priority over last minute candidates for boat assignments.

Notice

You will find a notation on the QE request form and in the Boat Crew Qualification Guide that candidates need to bring Appendix F with them to the OPTREX. This is not necessary. The attached form should be filled out by the FSO-IS at the beginning of training and submitted by mail with the QE Request form 30 days prior to the date of the OPTREX. For the one or possibly two last minute additions, the form should be Emailed or Faxed 10 days prior to the OPTREX Date.

Reminders

If you haven’t yet made a flier for your OPTREX, please do so ASAP. Encourage the Flotilla Commanders to promote the training and OPTREX at all Flotilla Meetings Please send a copy to DSO-OP and [d11-smb-d11aux-south@uscg.mil](mailto:d11-smb-d11aux-south@uscg.mil) These are needed so that the QE’s can coordinate the Dock-Side Orals and any additional training at the OPTREX.

Please have only one contact person per OPTREX. In most cases this will be the SO-OP.

Please send in only one consolidated QE request for per OPTREX. Not one form each flotilla.

The OPTREX Coordinator is in the best position to assign crews to facilities but in the absence of a workable plan the Senior QE will make assignments.

Have flotilla Commanders work with their FSO-IS to make sure candidates are ready and all requirements have been entered into AUXDATA and that the forms are included with the QE Request.

Please encourage candidates to practice before the OPTREX. Every year a number of non-facility owning coxswains struggle to requalify because they hadn’t practiced their coxswain skills and don’t take command of the vessel during the evolution.

Last year we had some facility owners that were very uncomfortable with crew and coxswain candidates operating their vessel. All candidates are required to demonstrate their ability to operating the vessel so please verify with the facility owners ahead of time their agreement or choose a different facility.

In the past we have had a problem with unmatched vessels. We don’t want the vessels to cause of difficulty in the qualification process. For example, it is very difficult for a small facility to side tow or be side towed from a much larger facility.

Uniforms

Please insure that all candidates are properly wearing the auxiliary uniform and that all PPE is inspected and up to date.

In closing, please contact me with any questions or concerns you may have. Communication is so important so we can deal with any issues early on.

Use the chart below to verify that all the prerequisites for the currency maintenance Check-Ride have been completed. Please have the FSO-IS complete the form for each candidate and forward to the SO-OP

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Prerequisite | | CREW | | COXSWAIN | | PWO | |
| (I) = Initial, (3/M) = 3 Year Maintenance | | I | 3/M | I | 3/M | I | 3/M |
| 28hrs, under way as Qualified crew | |  |  |  |  |  |  |
| Not in REYR for underway hours | |  |  |  |  |  |  |
| Boating Safety Class | Completed |  |  |  |  |  |  |
| BQ II if enrolled after 01FEB2018 | Completed |  |  |  |  |  |  |
| ICS-100 | Completed |  |  |  |  |  |  |
| ICS-700 | Completed |  |  |  |  |  |  |
| RM 100202 course | Current |  |  |  |  |  |  |
| TCT Refresher | Current |  |  |  |  |  |  |
| OPS WKS | Current |  |  |  |  |  |  |
| Core Value Training | Completed |  |  |  |  |  |  |
| ICS-200 | Completed |  |  |  |  |  |  |
| ICS-800 | Completed |  |  |  |  |  |  |
| ICS-210/300 | Completed |  |  |  |  |  |  |
| Nav Rules \* | Current |  |  |  |  |  |  |
| Ops Policy | Completed |  |  |  |  |  |  |

\* The closed book NAV Rule exam is required for all new coxswain or PWO candidates or any coxswain or PWO that has gone into REYR for NAV Rules. Remember, the Closed NAV Rule exam expires 5 years from the date the exam was taken, not at the end of the 5th year.

**OPTREX QE Request**

**From: Date:**

**OPTREX Dates:**

**Location (Marina or Facility:**

**Meeting Room Available: Capacity:**

**Hours Available: Distance:**

**I am requesting QEs for the following members**

**NAME Member # Division/Flotilla Crew/Cox-I/R**

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Member Names, Member #, Division/Flotilla Crew (CR), Coxswain (CX),Initial (I), 3 Year (R)

**Facility # Name Coxswain**

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