

CADET CORPS AND SQUADRON BASIC MANAGEMENT PROCEDURES

(Disponible en français à www.cadets.ca/SAIOC)

QUICK REFERENCE GUIDE

This guide provides step by step instructions on the following procedures

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| <ul style="list-style-type: none">• How to Access FORTRESS• How to Create an Activity (e.g. Training Night)• How to Record Attendance• How to Enrol an Applicant (New Cadet)• How to End a Cadet's Membership• How to Record Promotions | <ul style="list-style-type: none">• How to Submit Participation Applications• How to Record Honours or Awards• How to Respond to Participation Offers• How to Record PO Results• How to Generate Local Training Qualification Levels• How to Validate Personal and Medical Information Annually |
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NOTE

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| <ul style="list-style-type: none">• In this guide, tasks assigned to the Admin O can be completed by any member of the corps/sqn staff who has the proper permissions. | <ul style="list-style-type: none">• Consult the applicable CATO, administrative order or directive and FORTRESS' User Help section for any procedure not covered in this guide or for more information. |
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HOW TO ACCESS FORTRESS





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| <ul style="list-style-type: none">• In order to access FORTRESS, you need:<ul style="list-style-type: none">○ a CCO Net account;○ a FORTRESS account and role which you can request from your CO;○ to log into the CCO Net, launch your Internet browser and type the web address https://FORTRESS-FORTRESSE.cadets.gc.ca. | <p><u>Note</u>
If you are accessing FORTRESS from a CCO Net computer, a bookmark has already been added.</p> <ul style="list-style-type: none">• Detailed information regarding the CCO Net can be obtained from the COATS website or by contacting your regional IT service desk. | <ul style="list-style-type: none">• There are 3 different versions of FORTRESS, each with a different coloured background: "Live" (grey), "Trial" (orange) and "Training" (blue).• With the "Trial" version, you can practice entering information and using functions without affecting corps/sqn data. |
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IMPORTANT NOTICE

- Ensure that you are entering information into the "Live" version of FORTRESS otherwise the information will not be saved.

HOW TO CREATE AN ACTIVITY (E.G. TRAINING NIGHT)

The Admin O

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| <ul style="list-style-type: none">• In FORTRESS:<ul style="list-style-type: none">○ from My Corps/Sqn Menu, click on Activities, then click ;○ fill in the mandatory fields; | <p><u>Option 1 – Activity open to all cadets</u></p> <ul style="list-style-type: none">○ check the Activity Open to all Cadets box, then click . <p><u>Option 2 – Activity open to specific cadets</u></p> <ul style="list-style-type: none">○ click . | <ul style="list-style-type: none">○ in the List of cadets Available on the Activity Date section, select applicable cadets by checking the box next to their name, then click . |
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NOTE


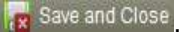
- Go to the "Consulting and Managing a Series of Activities" in the FORTRESS' User Help section when the same activity (mandatory training nights, band practices, etc.) is to be repeated throughout the training year.

HOW TO RECORD ATTENDANCE

NOTE

- Before attendance can be recorded, a training night or other activity must first be created.
- Attendance must be entered into FORTRESS within 30 days of the activity.

The Admin O

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| <ul style="list-style-type: none">• In FORTRESS:<ul style="list-style-type: none">○ from My Corps/Sqn Menu, click on Activities, then click  next to the applicable activity; | <ul style="list-style-type: none">○ enter an attendance status for each cadet by checking the appropriate box next to their name;○ before leaving this section, click . |
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HOW TO ENROL AN APPLICANT (NEW CADET)

NOTE

- Information must be entered into FORTRESS ASAP but no later than 60 days after the enrolment date. Otherwise, the new cadet can not be registered on his/her official TOS date.

The applicant and his/her parents

- Complete the *CF 1158 Membership Application* form, provide an acceptable proof of identification and, if applicable, other required documents.

The Admin O


- Verify the *CF 1158* is properly completed and required documents are included.
- If, in section 7 of the *CF 1158*, the answer to any of questions 1, 3, 4 or 5 is "Yes", hand out the *DND 2570 Detailed Health Questionnaire* and related instructions to the cadet and his/her parents.
- Complete section 10 of the *CF 1158* which includes, entering a suggested TOS date based on the cadet's first day of attendance.

The CO


- Complete section 11 of the *CF 1158* by, indicating decision and, if applicable, confirming the TOS date.







The Admin O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Cadets**, then **Enrolment**;

- click on the cadet's official enrolment date as it appears in section 11 of the *CF 1158* and click ;


Note


- If the applicant indicated currently being a cadet or having been one in the past, go to "Reactivation and Transfer of a Cadet" in the FORTRESS' User Help section.
- enter the information as it appears in sections 1 to 6 on the *CF 1158*:
 - if the applicant's mailing and civic addresses are the same, click ;
 - if "Yes" was entered as the answer to the question in section 5, a text box will appear in which restrictions, conditions or prohibitions found in the court order, are to be entered,
 - if he/she entered "Limited" as the answer to the question in section 6, a text box will appear in which visitation times and conditions are to be entered;
- click on the **Health Information** tab and enter answers to questions found in section 7 of the *CF 1158*;

- once all information has been entered, either:
 - click  and be redirected to the cadet's personal file to enter additional information (e.g. alternate contact), or
 - click  and from the dropdown menu, click  Save and New to enrol another cadet right away;
- from the **Personal File** screen, click  next to the cadet's name;
- click  Print, then **Cadet Medical Information Summary**,
- click  and follow printing instructions.
- Circulate a copy of the *Cadet Medical Information Summary* sheet to the training officer and the cadet's supervisor, as well as other staff members as required.
- Place the *CF 1158* and other provided documents in a *DND 2399 Cadet Personnel Record* folder and file it away.

HOW TO END A CADET'S MEMBERSHIP

The Admin O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Cadets**, then **Personal Files**;
 - click  next to the applicable cadet's name;


- click on the **Membership Information** tab, then **End of Membership** from the dropdown menu;
- enter the last day of membership and select the reason behind the decision;
- click , then **OK**.


HOW TO RECORD PROMOTIONS

NOTE

- A promotion is to be recorded only if the cadet meets prerequisites (CATO 13-02) and the CO has approved it.
- In order to be promoted to any rank from LS/Cpl to PO1/WO/FSgt, PO results must first be recorded and Phase/Star/Proficiency level qualifications generated.
- In order for a promotion to take effect on a given date, it must be recorded within 60 days of it.

The Admin O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Batch Allocations**, then **Promotions**;
 - enter the date of eligibility, then click  which will display a list of eligible cadets;

- check the box next to the applicable cadets' name;
- click ;
- click on **OK**.

HOW TO SUBMIT PARTICIPATION APPLICATIONS

NOTE

- Detachments or RCSUs are expected to advise corps and squadrons when summer courses, staff cadet positions or directed activities are posted in FORTRESS.



The Admin O


- Print (or photocopy) the required number of *Application for Participation* forms which are available from the COATS website, and distribute them to the cadets.

The cadet and his/her parents

- Complete sections 1 to 4 of this form and return it to the Admin O or other staff member, as directed.
- Army cadets applying for advanced training and expeditions must enter significant achievements in the box in section 3.
- Other cadets could be directed, under separate directive, to include additional information in this box.

The Admin O

- verify the form is properly completed.
- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Summer Courses and Directed Activities**, then **Participation Applications**;
 - click ;
 - select the cadet's first choice by checking the box on the left, then click ;

- check the box next to the cadet's name;
- click .

Note

Steps above must be repeated for each of the cadet's choices.

- Using information from FORTRESS, complete section 5 of the form by indicating, for each of the cadet's choices:
 - if he/she is eligible or not, and if not, if he/she is eligible for a waiver; and
 - which criteria he/she is missing, if any.




The Cadet's Supervisor

- If directed by the CO, complete section 6 of the form by indicating recommendation and, if required, providing substantiation.

The CO

- Complete section 7 of the form by:
 - indicating a decision and, if required, providing substantiation and/or comments;
 - if directed by the selecting agency, indicating a loading priority.

The Admin O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Summer Courses and Directed Activities**, then **Participation Applications**;
 - click  next to the cadet's first choice and enter the information from section 7 of the form;
 - click on  **Save**;
 - **Note**
Steps above must be repeated for each of the cadet's choices.
 - from the **Participation Applications** window, click on the **Prepare and Submit Applications** tab, then the **Complete Applications Ready to Be Submitted** tab;
 - in order to submit them, check the box next to each application, then click ;
 - **Note**
Only participation applications with the "Application Complete" status can be submitted to the RCSU.
 - click on **OK**.
- Unless otherwise directed by the CO, destroy the application form.

NOTE

- Air cadets whose national course or international exchange application has been approved for consideration by their CO will also be required to complete a DND 2226 or, for Eastern Region cadets, a CAD 115. Details are found in CATO 51-01.


HOW TO RECORD HONOURS AND AWARDS



NOTE

- National, League and RCSU (including Detachment) honours and awards are created in FORTRESS by the applicable CF authority. Local awards (corps/sqn, sponsor, etc.) must be created by the corps/sqn. Instructions on how to do this can be found in FORTRESS' Help and Resource Centre.
- When recipients are selected locally (e.g. corps/sqn, sponsor), it is the responsibility of the corps/sqn to record them in FORTRESS.

The Admin O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Batch Allocations**, then **Awards**;

- click on an award, which will display a list of cadets who have already received the award;
- at the bottom of this list, click .





- enter the allocation date, then click .
- select the recipients by checking the box next to their name, then click .

HOW TO RESPOND TO PARTICIPATION OFFERS

NOTE

- Detachments or RCSUs are expected to advise corps and squadrons when participation offers are posted in FORTRESS.

The Admin O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Reports**, then  next to **Offers of Participation – Courses, positions and activities**;
 - from the **Filter By**  dropdown menu, click on the filter of choice;
 - from the **Choice** dropdown menu,
 - if filtered by “Cadet”, click on the applicable cadet’s name,
 - if filtered by “Corps/Sqn”, click on corps/sqn no;
 - if filtered by “Serial”, click on the applicable serial no and name,
 - click ;
 - click  and follow printing instructions.
- Hand the offer to the selected cadet(s).

The cadet and his/her parents

- With regards to the *Offer of Participation* form, :
 - complete sections 3 to 5;




- if the answer to section 4, first question is “Yes”, overwrite by hand any personal information no longer valid, complete or exact;
- return page 2 to the Admin O or other staff member as directed.

Note

Certain courses, positions and activities will require that the cadet and his/her parents complete additional forms. Details are provided in the applicable document (CATO, directive, etc.).

The Admin O

- Verify the form is properly completed.
- If the answer to section 4, question 2 is “Yes”, hand out to the cadet and his/her parents the *DND 2570 Detailed Health Questionnaire* and related instructions.
- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Summer Courses and Directed Activities**, then **Participation Applications**;

- from the **Participation Application Follow-up List** window, click  next to the cadet’s name;
- click on the **Offer of Participation** tab;
- enter the cadet’s and his/her parents answers in the **Offer of Participation** section, then click  **Save**;
- Note**
Steps above must be repeated for each cadet and his/her choices.
- from the **Consult Selections and Answer Offers** tab, click on the **Answers to Offers Ready to be Sent** tab;
- check the box of every answer to be sent;
- click , then **OK**.
- Place the completed form in the cadet’s personnel file. Unless otherwise directed, there will be no need to photocopy and/or mail this form.



HOW TO RECORD PO RESULTS


NOTE

- PO results must be recorded not later than 30 June of the training year during which they were obtained.

The Trg O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Batch Allocations**, then **Training Results**;
 - in the **Training Program** dropdown menu, click on the applicable training

- level (e.g. Phase 1, Green Star, Level 1), then click ;
- type in the cell below the applicable PO no the training result (0, 1 or 9) which applies to the majority of listed cadets;
- click  to allocate this result to all cadets;

- for those cadets who obtained a different training result for this PO:
 - click in the PO’s cell next to their name,
 - overwrite it by inserting the applicable result (0, 1 or 9);
- click .


HOW TO GENERATE LOCAL TRAINING QUALIFICATION LEVELS

NOTE

- Before said qualifications may be generated, all PO results must be recorded as “Participated” (or equivalent).

The Trg O

- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Batch Allocations**, then **Training Results**;



- click on  **Actions**, then **Generate Local Training Program Qualifications** from the dropdown menu;
- click on **OK**.

HOW TO VALIDATE PERSONAL AND MEDICAL INFORMATION ANNUALLY

NOTE

- Validation must be completed not later than 31 October annually.


The Admin O






- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Reports**, then  next to the **Cadet Personal Information Validation Form**;
 - follow printing instructions;
 - from **My Corps/Sqn Menu**, he/she click on **Reports**, then  next to the **Medical Screening Follow-up List**;
 - follow printing instructions.
- Distribute to each cadet:
 - a validation form with his/her name;
 - either a *DND 2571 Annual Basic Health Questionnaire* or *DND 2570 Detailed Health Questionnaire* (and related instructions), as indicated on the *Medical Screening Follow-Up List*.

The cadet and his/her parents

- Complete and return:
 - the validation form and, if applicable, the *DND 2571* to the Admin O;
 - if applicable, the *DND 2570* directly to the RCMLO at the address provided in related instructions.

The Admin O

- Verify the validation form and *DND 2571* are properly completed, and if applicable, required documents are included.
- Complete section 5 of the validation form.
- In FORTRESS:
 - from **My Corps/Sqn Menu**, click on **Cadets**, then **Personal Files**;
 - click  next to the cadet's name;
 - correct and/or amend information found under the **Personal Information** tab, as required;

- if no changes or corrections are needed or once they're done, click  to confirm validation, then  **Save**;
- Option 1 – Cadet completed a *DND 2571*
 - in the cadet's **Personal File**, click on the **Personal Information** tab, then the **Medical Information** tab;
 - click  next to “Basic Health Questionnaire” and enter answers to questions;
 - once all information has been entered, click on , then  **Close**;
- Option 2 – Cadet completed a *DND 2570*
 - no action to take related to this form.
- Complete section 6 of the validation form.
- Complete, if applicable, section 4 of the *DND 2571*.
- Place the validation form (including supporting documents, if any) and, if applicable, the *DND 2571* in the cadet's personnel file.

NOTE

- This guide will be updated to a new version as required and as FORTRESS blocks and functions are changed or delivered.
- Suggestions for changes to this guide shall be forwarded through normal channels to National Defence Headquarters, attention D Cdts 2-2.