

PHS Separations in Direct Access Standing Operating Procedures

Login to the Direct Access System

1. Open a browser window (Internet Explorer).
2. Copy and paste the URL below into the browser's URL address window.

Ctrl + Click on the hyperlink below.

<https://portal.direct-access.us/psp/EPPRD/?cmd=login&errorPg=ckreq&languageCd=ENG>

3. Click the Sign in to PeopleSoft link.
4. Enter the your UserID and Password (case sensitive).
5. Click Sign In.

1 Scenario: Create a Separation Request for a Retirement

Direct Access Component: Separations Request/Authorization

Navigation: Separations Pagelet> Separation Rqst/Authorization, or

Enterprise Menu > Separations > Separation Rqst/Authorization.

1. On the Search page, enter an EmplID to Find an Existing Value.
2. Click Search. If no existing request is found, a new Separation Request page displays.
3. Complete the **Rqst Separation tab**/page:

Field	Value	Note
Request Type Code	RET	(see Appendix for list of codes)
Member Submit Date	<date>	Date the member submitted forms or intention to retire
Sep Effective Date	Date the retirement becomes effective	Usually the day <i>after</i> last day on duty. Active pay ends, any retirement pay begins
Sequence	accept default of 1	Indicates sequence of this Sep Request if more than one request on same date.
Request Status	Accept default of Pending	Use this status on initial entry.
Decision Date	leave blank	fill later when changing Status to Approved
Request Source	Member	Used for CG reporting
Comments	Free entry	Enter any information to convey about this request
Reserve checkboxes	Do not use	CG only, when member enters Reserves
Cancel buttons	Do not use	Only for Canceling a request/order

Click **Save** to save and continue editing.

4. Click the **Separation Info tab** to display that page.
5. . Complete the Separation Info fields:

Field	Value	Note
Separation Type Code	719	
Article/Law	auto	populates based on Sep Type Code association
SPD Code	RBC	Codes are associated with the Sep Type code for PHS, in configuration
Re-Enlistment	N/A	(for enlisted CG only)
Char of Service	Select	Used on DD214
Officer Term Code	select	Officers' nature of termination
Earnings Element	select	disability or severance pay, if applicable
Sep Pay Type	If applicable	Typically not paid on retirement
Highest Grade Held	Select	used in retirement calculation
Retired Pay Jobcode	select	If member will retire with a different Jobcode than current
Disability Percent	Specify	If a percentage will be used in pay
CG Heroism	None	CG only
Education Years	# of years (X.XXX), max 5 years	Applied toward retirement calculation in retiree accession process, if specified.

6. Click the **Comments** tab to display that page.
7. Complete the Comments page by updating Clauses to be printed on the Separation Authorization form:

Clauses that are associated in configuration to this request's Separation Type code will be prepopulated (*Separations Setup, Separation Paragraph Association*)

Field	Value	Note
Clause	Auto-populated; can also select	PHS configured values begin with 'U'
Seq Nbr	1	Establishes order of clauses on printed authorization
Comments	Free text	

8. Review / add required Clauses to print on the Separation Authorization, if desired.
9. Click View All link to see all clauses in a list.
10. Click **Save**.
11. Click back to the Rqst Separation tab.
12. Verify the Last Updated By field is populated with the user's id, and date/time.

Next Step: Self-Approve the Request

2. Approve Separation Request for Retirement)

Separation Requests are approved on this page without any further 'routing.'
The user who entered the Request may also approve it.

1. Return to the Rqst Separation page if you are still in the Request.
2. Or, on the Search page, enter an EmplID to Find an Existing Value.
3. In the Request Status field, select Approved from the list.
4. Enter a Decision Date: today's date, or an approval date from your business process.
5. Click Save.
6. The TransID field auto-populates a value. **Make a note of this number; it is the Separation Order ID.**
7. No Funding or TONO is generated for PHS Separations.
8. Click the [Print Authorization Form](#) hyperlink to generate this form, if desired.

3. Print Separation Authorization Form

(Optional) The Separation Authorization is a Coast Guard form used to document that the separation is in process when making travel plans and executing the member's separation checklist activities. It is distinct from the Separation Order, which reflects final details and approvals.

1. On the Rqst Separation page in the Request, click Print Authorization Form.
2. A new browser window opens to display a pdf rendering of the form.
3. The form displays data from the Separation Request. The clauses from the Comments page are listed below.
4. Hover the mouse over the bottom of the page to reveal help options to save, print, page up/down, and zoom the report.

Click the Acrobat icon on the far right to display an Adobe Acrobat toolbar on the window for more options.

Close the browser window when you are finished with the Authorization.

4. Amending a Separation Request

Requests may be amended either before or after the Separation Order has been approved. Changes will be reflected on the Order.

1. Open the Separation Request.
2. Perform the needed change(s) to the request pages;
3. Reset the Request Status to Approved.
4. Save the record.
5. System will automatically flag the 'Checked If Amended' checkbox.
6. Changes will be populated on the Separation Order

On this Request, the Member Submit Date was changed to 7/20/2015. After clicking Save, the Checked if Amended box updated to 'checked.'

5. Completing a Separation Order

Direct Access Component: Separation Orders

Navigation: Separations Pagelet>Separation Orders link, or Enterprise Menu > Separations > Separation Orders.

When a Separation Request is approved, the system generates a new Separation Order and pre-fills the fields with values from the Separation Request. The SPO will open the Separation Order from the Separations pagelet and complete all other details.

1. Click on the Separation Orders link.
2. Search for the Order by EmplID.
3. The Separations component opens, displaying the Separation Details page. Data from the Request cannot be edited on the Order.
4. Select a Retirement Authorization value (required).
5. Click the **Additional Info** tab.

Any pay Elements and pay rates that were previously authorized in the Separation Request will display here.

6. Click the **Order Information** tab.
7. Update the Authority value to a PHS relevant value, or delete it.
8. Update the Official's name, if desired. This will be printed on the order form.
9. Continue to the Order Travel page.
10. In the Travel Orders section, review both the Depart and Report rows (click [View All](#) to display all rows.)
11. Per Diem, Travel Details, Additional Authorized Expenses are for government reimbursable travel expenses.
12. Enter any Terminal Leave taken in the Delay En Route section. End Date must be the same as the Depart Date, (the last day on paid duty before the Separation Effective Date.)

Note: Entitlements will be stopped on the first date of Terminal Leave, if entered here. Use an action request for other types of terminal leave that do not stop entitlements.

Note: Any remaining leave balance at the date of separation will be paid as a 'lump sum' amount.

13. Click the **Order Notes** tab.
14. Select Contract (Order) Clauses from the list. At least one clause must be added. These will print on the finalized Order.
15. Use the + to insert additional clauses. PHS specific clauses begin with 'U'.
16. Update the Sequence Number field to sequence how the clauses will appear on the order.
17. Click the Leave Information tab.

Current Leave Balance and any Terminal Leave you entered are shown here for information. Actual balances will be calculated at the time of separation.

18. Total to Carry Over: # of days leave member may take to next job (CG only).
19. Click the **Order Approvals** tab.

6. Submit a Separation Order for Approval

Initiate approvals on the Order Approval tab of the Separation Order component.

1. Click the **Order Approvals** tab.
2. Current user's ID and Dept are populated.
3. Enter any Comment you wish the approver to see. It will not show on the printed Order.
4. Click Submit. The page updates the approval status and shows the initiator's name.
5. The approval request will be visible to users with the Approver role (Multiple Approvers).

7. Approve a Separation Order

Separation approvals appear as action requests on approvers' View My Requests page. Only one user needs to Approve. The system uses the Approval Workflow Engine (AWE) for approval routing between initiators and approvers, to ensure separation of duties (same person cannot enter and approve a separation order).

Direct Access Component: View My Requests

Navigation: Enterprise Menu > Human Resources > Requests > View My Requests

1. Login as the Approver.
2. Navigate to View My Requests. Hint: Click 'Add to My Links' to save this page as a 'favorite.'
3. The View My Action Requests page displays.
4. Select 'Requests I am Approver For.'
5. Select the Transaction Name 'Approval Sep Order Header' to limit the results
6. You may also filter by Status and Submission Dates.
7. Click Populate Grid to see those requests waiting below.
8. Click the Approve/Deny link on a Sep Order row to open the Order to the Approval page.
9. Dept of Approving SPO will populate after the approval
10. Enter Comments in the Route for Approval section.
11. Click the Approve button. **Note:** This single approval will authorize all separation pay actions, travel details and leave disposition for this order.
12. Return to the Order Search page and open the order again to see the refreshed approval status.
13. Once the Order is approved, the Order Status will update to 'Ready.' The order will no longer be available to other users for approval.
14. Return to the View My Requests page and refresh your Sep Order search using Transaction Status "All Statuses."
15. Status of this request will update to Approved in the Requests results grid.
16. Close the View My Requests browser window.

8. Printing a Separation Order

Users may generate printed copies of the order, using the Order Action dropdown in the Order page header.

- The printed order generates an Adobe Acrobat pdf file in the standard CG-5131 format.
 - If the order has not yet been approved, some data will not display on the order;
1. Open the Order from the Search page.
 2. Locate the Order Action field in the header of any tab
 3. Select Print Order from the drop-down list.
 4. Click Go.
 5. A new Direct Access browser window opens to display the formatted order.
 6. You may save or print the order from this window.

9. Generating Separations Reports

Direct Access Component: Separations Reports

Navigation: Separations pagelet > select from multiple Separations Report links, or

Enterprise Menu > Separations > Separations Reports >

1. Select a report that you wish to run.
2. Enter your criteria. The Company field has been added as a criteria to locate PHS records.
3. All reports display as a grid, which you can download into Excel for further formatting.

Separation Request by Status Finds Requests by date range, Reg Region (PHS), Request Type, Status or Company.

Separation Request Extract Finds Requests by date range, Request Type, Status, SPD Code, or Company. Specify Company 'PHS'. Results show more data than Requests by Status.

Separation Summary Report Finds Requests by EmplID.

Separation Orders Extract Finds Sep Orders by multiple criteria, reports show most Order data.

Separation By AD Term Date Finds employees whose Expected Loss Date falls within a date range.

10. Generating the DD214 Form

Direct Access Component: DD214 Form

Navigation: Main Menu > Separations > DD214 Form

1. The SPO initiates a DD214 by searching by EmplID.
2. The DD214 Worksheet page opens,
3. Data from the saved Separation Order, the member's Job Data, Awards, Education and Personal Data is loaded to the DD214 Form page.
4. Separation specific data begins 'Special Additional Information' in Block 23.
5. SPO Technician completes the remaining editable blocks on the DD214 Form page.
6. SPO may Save the Form, exit, then return to continue updating the DD214 Form until it is ready for Supervisor review.
7. SPO may Print a review version for Supervisor.
8. SPO Supervisor/Approver reviews prepared DD214, communicates any changes needed to the SPO.
9. SPO may continue to update the DD214 Form.
10. (see Note) Once the SPO Supervisor is satisfied with the Form, SPO Sup will check 'Final' on the Form.
11. (see Note) An electronic DD214 will be sent to DMDC upon finalization.

Note: Do not execute steps 10-11 during UVT. PHS should ensure that DMDC is ready to receive DD214s from PHS before PHS Separations goes 'live' in January 2016.