

## E-Mail ALSPO E/11

### Subj: HONORS AND AWARDS DATA ENTRY

Ref: (a) [Coast Guard Servicing Personnel Office \(SPO\) Manual, PPCINST M5231.3, Part III, General Transactions, Chapter 1, Manage Competencies](#)

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**Introduction** As part of the Coast Guard's technology refresh effort to move HR functions from version 8.0 to a supported version of PeopleSoft (version 9.1), CG-631 will be moving Awards data and supporting business processes to PeopleSoft HRMS version 9.1. At the completion of this project, PeopleSoft HRMS version 9.1 will become the source for Coast Guard Awards information, and current data entry access will be terminated within the legacy applications.

Applications which display or report award data (e.g. Self Service (View My Honors and Awards), DD-214, e-resume, Personal Data Information File) are not changing at this time.

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**Effective Date** The target date for system cutover will be the weekend of 18 June 2011. CG-631 plans to conduct project migration, data conversion, and transition of messaging and interfaces during this time, which will make access to Awards applications unavailable between 1700 (CDT) Friday, 17 June 2011 through 1200 (CDT) Monday, 20 June 2011.

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**Individual Awards Data Entry Procedure** Enclosure (1) provides SPO data entry procedures for entering, correcting or deleting an individual honor or award. These procedures supersede the procedures in reference (a) for individual award data entry.

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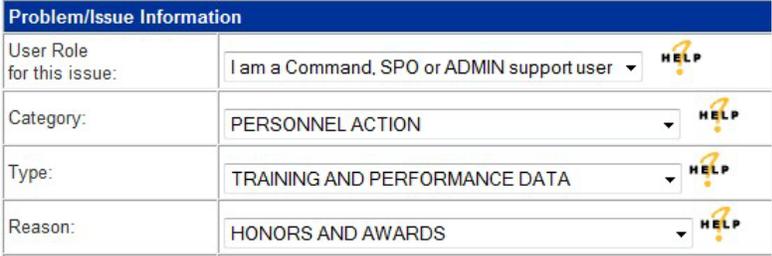
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## E-Mail ALSPO E/11

### Subj: HONORS AND AWARDS DATA ENTRY

**Multiple  
Awards Data  
Entry / Mass  
Update**

The Honors and Awards Multiple data entry application used in PeopleSoft HRMS version 8.0 cannot be migrated to version 9.1. However, PPC will have the ability to perform a mass update of award data when the same award is issued to a group of 25 or more individuals. This is the SPO procedure for requesting a mass update of awards data:

Step	Action
1	Prepare a roster of personnel authorized the award. The roster shall be in Microsoft Excel (spreadsheet) file format and include, at a minimum, the employee IDs and names of personnel authorized the award. The employee IDs must appear in a single column and must be the first column in the spreadsheet.
2	Scan the award citation / authorization.
3	<p>Transmit the roster and award citation/authorization to PPC Customer Care via trouble ticket (<a href="http://cgweb.ppc.uscg.mil/ccb/">http://cgweb.ppc.uscg.mil/ccb/</a>). Complete the Problem/Issue Information section of the trouble ticket as shown below:</p>  <p>Follow the instructions at <a href="http://cgweb.ppc.uscg.mil/ccb/attachment.asp#guide">http://cgweb.ppc.uscg.mil/ccb/attachment.asp#guide</a> to attach the spreadsheet and award citation/authorization to the trouble ticket.</p>
4	PPC (ID) will perform the mass update and inform the SPO when the update is completed.

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**Directives  
affected**

The contents of this E-Mail ALSPO message will be incorporated into the applicable sections of reference (a). This E-Mail ALSPO message provides interim guidance which shall expire one year from the date of issuance unless it is incorporated into an appropriate PPC publication, reissued, or cancelled.

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**Questions**

Questions regarding the content of this E-Mail ALSPO message may be directed to PPC Customer Care at:



(866) 772-8724/(785) 339-2200



<http://cgweb.ppc.uscg.mil/ccb> (Online Trouble Ticket/Inquiry Form)



[PPC-DG-CustomerCare@uscg.mil](mailto:PPC-DG-CustomerCare@uscg.mil) (E-Mail)

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**Released by**

Internet release authorized.

/s/

J. D. PHILLIPS, CAPT, USCG  
Commanding Officer

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Encl: (1) Awards: Adding Individual Awards via the Person Profile

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UNITED STATES COAST GUARD



# Awards (SCP#36519)

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## Adding Individual Awards via the Person Profile

6/6/2011

Prepared by  
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Step-by step instructions on adding, updating and deleting member honors and awards in Direct Access.

Enclosure (1)

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## 1 Introduction

Individual USCG awards are maintained in the Person Profile of Direct Access. Information about a member's ribbons, medals and other honors is stored here. The Servicing Personnel Offices enter and maintain this information. The information is available to the member via self service.

Awards can be entered one at a time directly into the Person Profile or en masse using Mass Update, a bulk load process. There is a separate guide with instructions on how to perform a bulk load. This guide details how to add, update and delete one award at a time on the Person Profile page.

## 2 Portal Navigation

Frequently used links for adding awards are located in the Portal pagelet for Awards. These pagelet links allow a user to quickly navigate to pages without going through a lengthy menu.



1. Add an Honor or Award: This link takes the user to the Person Profile screen. Honors and Awards are recorded on the Person Profile screen.

## 3 Adding an Award

When information about a member's award is received and ready to be entered into Direct Access, navigate to the following page:

**Portal Link:** Add an Honor or Award

**Menu path:** Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Direct Access also remembers recently used pages. If you have used the Person Profile page recently, you can go to Favorites > Recently Used > Person Profiles.

### 3.1 Locating the Member

Use the Search record to pull up the member's Person Profile using the member's EMPLID or name.

#### Person Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Maximum number of rows to return (up to 300):

**Empl ID:**

**Profile Type:**   

**Name:**

**Last Name:**

**Alternate Character Name:**

Include History  Correct History  Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

If the search returns more than one record, be sure to select the correct member's record that has "PERSON" in the Profile Type column.

PERSON	MORGAN	(blank)
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**Note:** If a member has both a Person Profile and an Awards Coordinator Profile, then that member is a PHS officer who is or has been assigned to the Coast Guard for duty. Please coordinate with the member and PHS to ensure that the member's awards are properly approved and recorded.

## 3.2 Entering the Award

### 3.2.1 Viewing Honors and Awards

1. Select the “Qualifications” tab.

The screenshot shows a web application interface for a "Person Profile". The breadcrumb trail is: Favorites > Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles. The profile is for "Morgan" (Empl ID: [redacted]). The "Profile Status" is "Active". The "Description" is "Morgan". The "Profile Actions" dropdown is set to "<Select Action>". A navigation bar contains tabs: Competencies, Responsibilities, Qualifications (selected, with a red arrow pointing to it), Education, NVQ, Projects, Worn Rank, and Mobility. Below the tabs, a message states: "There are currently no Competencies for this profile. Please add one if required." There is a "+ Add New Competencies" button. At the bottom, there are "Save", "Return to Search", "Previous in List", "Next in List", and "Add" buttons.

2. A list of the member’s current honors and awards will display. If a member has more than five honors or awards, they won’t all display unless you click “View All.”

The screenshot shows a table titled "Honors and Awards (Approval Not Required)". The table has three columns: ID, Honor and Award, and View History. There are five rows of awards. At the top right of the table, there are links for "Customize", "Find", "View All", "First", "1-5 of 11", and "Last". The "1-5 of 11" link is circled in red. Below the table is a "+ Add New Honors and Awards" button.

ID	Honor and Award	View History
CGAF	<a href="#">Armed Forces Service Medal</a>	
CGGWOTS	<a href="#">Global War Terror Service Medl</a>	
CGHC	<a href="#">CG Achievement Medal</a>	
CGMB	<a href="#">CG Meritorious Unit Comm Ribbo</a>	
CGML	<a href="#">CG Rifle Marksman Ribbon</a>	

3. Check to see if the member already has an award of the same type. This icon indicates that there are multiple entries for the award type:



Honors and Awards (Approval Not Required)			
ID	Honor and Award	View History	
CGAF	<a href="#">Armed Forces Service Medal</a>		
CGGWOTS	<a href="#">Global War Terror Service Medl</a>		
CGHC	<a href="#">CG Achievement Medal</a>		
CGMB	<a href="#">CG Meritorious Unit Comm Ribbo</a>		
CGML	<a href="#">CG Rifle Marksman Ribbon</a>		
CGMM	<a href="#">CG Pistol Sharpshooter Ribbon</a>		
CGMT	<a href="#">CG Meritorious Team Comm Ribbo</a>		
CGNA	<a href="#">CG Comdt Ltr of Comm Ribbon</a>		
CGNH	<a href="#">National Defense Service Medal</a>		
CGPUC	<a href="#">CG Presidential Unit Citation</a>		
CGSU	<a href="#">CG Port Security Insignia</a>		

[+ Add New Honors and Awards](#)

### 3.2.2 Adding a New, Unique Honor or Award

1. To add a new honor or award to the member's profile, click "+ Add New Honors and Awards." The "Add new Honors and Awards" page appears.

#### Person Profile

### Add New Honors and Awards

**Empl ID:** [REDACTED] Morgan

**Profile Type:** PERSON Person

Add item details. Select OK to apply changes and return. Select Cancel to return. Select Apply and Add to continue adding additional items.

Details		Find	View All	First	1 of 1	Last
*Honor and Award:	<input type="text"/>					
*Issue Date:	05/13/2011					
*Status:	Active					
From Date:	<input type="text"/>					
To Date:	<input type="text"/>					
Grantor:	<input type="text"/>					

2. Enter the data about the award:
  - a. **Honor and Award (Required):** Enter the Award Code or, if the Award Code is unknown, search for the award by clicking the magnifying glass. Users may enter part of the title of the award in the Description field and click “Look Up” and/or use Content Group Type to filter the search. The magnifying glass will bring up the menu options.

Content Group Type allows you to narrow your search to the class of honor, i.e., medal/ribbon/award; pin/badge/insignia; or recognition

Content Group Type	Description
<a href="#">MDL/RBN/AWD</a>	<a href="#">Medal/Ribbon/Award</a>
<a href="#">PIN/BDG/INSG</a>	<a href="#">Pin/Badge/Insignia</a>
<a href="#">RECOGNITION</a>	<a href="#">Recognition</a>

- b. **Issue Date (Required):** Enter the date the award was granted to the member.
  - c. **Status (Required):** This field defaults to “Active.” Do NOT change this field.
  - d. **From Date (Optional):** If the award is for a specific period of time, enter the beginning date for that time frame.
  - e. **To Date (Optional):** If the award is for a specific period of time, enter the ending date for that time frame.
  - f. **Grantor (Optional):** The agency or organization granting the award.
3. Click “OK” to save the record.
4. Click “Save” at the bottom of the Person Profile page to commit the changes.

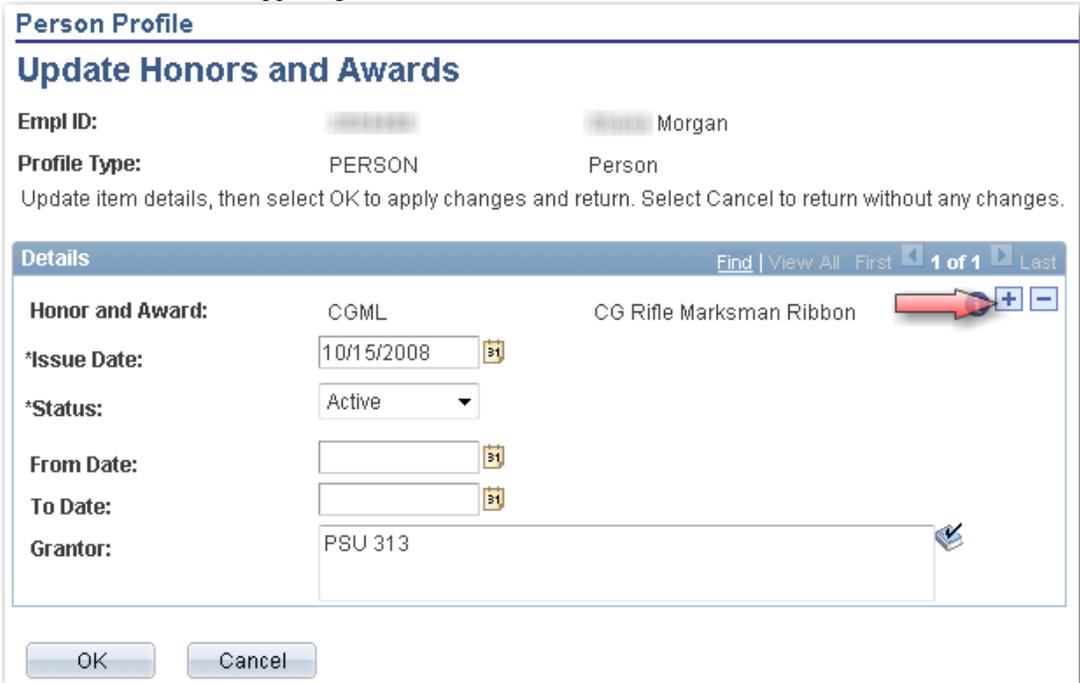
### 3.2.3 Adding an Additional Award of the Same Type

Many awards can be granted to a member multiple times. In these cases, the procedure to add the award to a member's Person Profile is slightly different. To add another instance of the same award, follow these steps:

1. To add a new award that the member has previously, click on the existing award record.



2. Click on the "+" in the upper right-hand corner of the record.

A screenshot of a web application window titled "Person Profile" with a sub-header "Update Honors and Awards". The form displays details for an award. At the top, it shows "Empl ID:" followed by a redacted ID and the name "Morgan". Below that, "Profile Type:" is set to "PERSON" and "Person". A note reads: "Update item details, then select OK to apply changes and return. Select Cancel to return without any changes." The main section is titled "Details" and includes a search bar with "Find | View All | First | 1 of 1 | Last". The award details are as follows: "Honor and Award:" is "CGML" with "CG Rifle Marksman Ribbon" to its right; a red arrow points to a "+" button next to this text. "\*Issue Date:" is "10/15/2008" with a calendar icon. "\*Status:" is "Active" with a dropdown arrow. "From Date:" and "To Date:" are empty with calendar icons. "Grantor:" is "PSU 313" with a document icon. At the bottom are "OK" and "Cancel" buttons.

3. A new award record is created with the current date populated in the Issue Date field. Also, the record will say “1 of x” in the upper right corner of the record.

**Person Profile**

### Update Honors and Awards

Empl ID: [REDACTED] Morgan  
 Profile Type: PERSON Person  
 Update item details, then select OK to apply changes and return. Select Cancel to return without any changes.

**Details** Find | View All First **1 of 2** Last

**Honor and Award:** CGMB CG Meritorious Unit Comm Ribbo [i] [+]

**\*Issue Date:** 05/13/2011 [31]

**\*Status:** Active [v]

**From Date:** [ ] [31]

**To Date:** [ ] [31]

**Grantor:** DOG [ ]

OK Cancel

4. Enter the data in the same manner as “[Adding a New, Unique Honor or Award.](#)”
5. Click “OK” to save.
6. Upon returning to the Qualifications tab, the multiple records icon will be there.
7. Click “Save” at the bottom of the Person Profile page to commit the changes.



## 4 Correcting or Updating an Award Record

### 4.1 Making a Correction

1. From the Qualifications tab, select the award to be updated or corrected. If the member has received the award multiple times, be sure to select the correct award record.
2. Change/correct the appropriate fields.
3. Click “OK” to save.
4. Click “Save” at the bottom of the Person Profile page to commit the changes.

### 4.2 Making an Update

1. From the Qualifications tab, select the award to be updated or corrected. If the member has received the award multiple times, be sure to select the correct award record.
2. Add a row by clicking the “+” sign.

3. Update the appropriate field.
4. Click “OK” to save.
5. Click “Save” at the bottom of the Person Profile page to commit the changes.

## 5 Deleting an Award

As with any delete function, use extreme caution when performing delete transactions. It is possible to delete the wrong record or records, especially if the member has multiple instances of the same award type. If a record is erroneously deleted, it will have to be recreated.

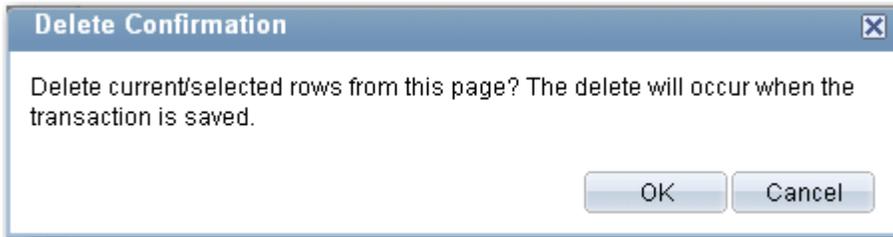
**Note:** If this is an award that has just been added, the “-“ button used to delete some records will not appear until the user leaves the page and returns. The easiest resolution is to click “Return to Search” and then re-enter the member’s profile. This is a nuance of the application.

### 5.1 Deleting a Single Award

1. To delete an award that a member has received only once, click the trash can on the row of that award.



2. Click “OK” to confirm the deletion.



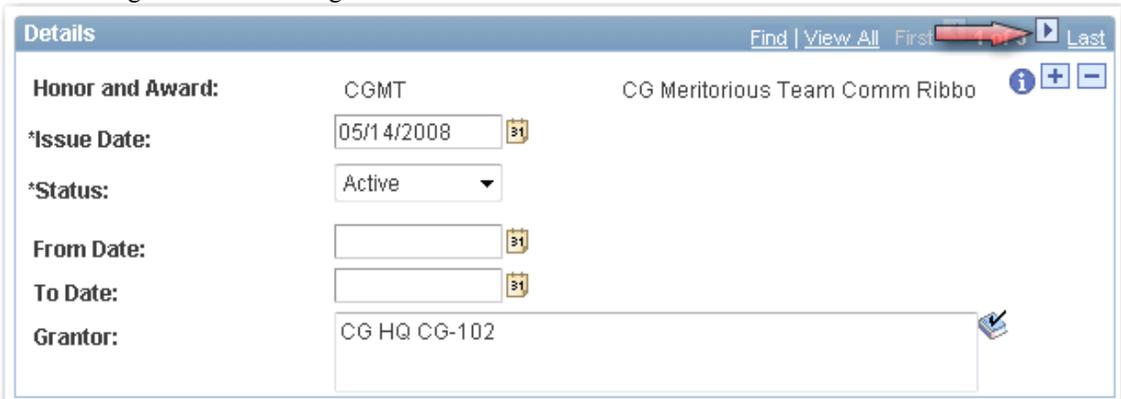
3. Click “Save” at the bottom of the Person Profile page to commit the changes.

### 5.2 Deleting One Award of Many

1. To delete one award of multiple awards of the same type, select the award.



2. Scroll through the records using the arrows to find the correct record to delete.



**Details** Find | View All First [red arrow] Last

**Honor and Award:** CGMT CG Meritorious Team Comm Ribbo ⓘ + -

**\*Issue Date:** 05/14/2008 ⓘ

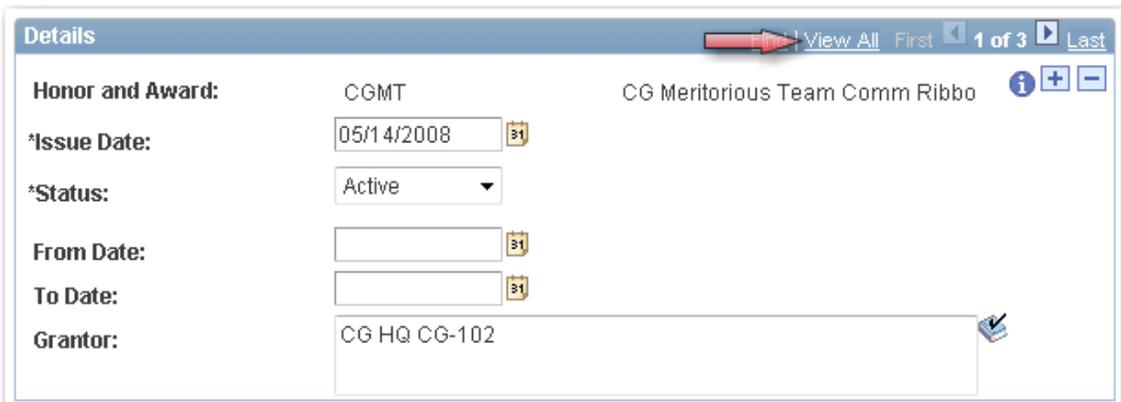
**\*Status:** Active ▾

**From Date:** ⓘ

**To Date:** ⓘ

**Grantor:** CG HQ CG-102 ⓘ

A user can also “View All” records.



**Details** [red arrow] View All First 1 of 3 Last

**Honor and Award:** CGMT CG Meritorious Team Comm Ribbo ⓘ + -

**\*Issue Date:** 05/14/2008 ⓘ

**\*Status:** Active ▾

**From Date:** ⓘ

**To Date:** ⓘ

**Grantor:** CG HQ CG-102 ⓘ

- Once the correct record has been located, click the “-“ button in the upper right-hand corner of the record.

The screenshot shows a 'Details' window with three rows of award information. Each row contains the following fields: Honor and Award, Issue Date, Status, From Date, To Date, and Grantor. The middle row is highlighted, and a red arrow points to the minus button in its top right corner.

Honor and Award:	CGMT	CG Meritorious Team Comm Ribbo
*Issue Date:	05/14/2008	
*Status:	Active	
From Date:		
To Date:		
Grantor:	CG HQ CG-102	
Honor and Award:	CGMT	CG Meritorious Team Comm Ribbo
*Issue Date:	10/15/2007	
*Status:	Active	
From Date:		
To Date:		
Grantor:	CGHQ	
Honor and Award:	CGMT	CG Meritorious Team Comm Ribbo
*Issue Date:	07/12/2007	
*Status:	Active	
From Date:		
To Date:		
Grantor:		

- Click “OK” to confirm the deletion.

The dialog box is titled 'Delete Confirmation' and contains the text: 'Delete current/selected rows from this page? The delete will occur when the transaction is saved.' There are two buttons at the bottom: 'OK' and 'Cancel'.

- Click “Save” at the bottom of the Person Profile page to commit the changes.

### **5.3 Deleting All Records for an Award Type**

This process is the same as deleting only one instance of an award type. Each record must be deleted individually using the steps outlined in the [“Deleting One Award of Many”](#) section. To prevent unintentional deletions of awards, the trash can functionality for multiple awards of one type has been disabled.