

E-Mail ALSPO C/10

**Subj: SPO ACCESS TO ELECTRONICALLY IMAGED PERSONNEL DATA
RECORDS (EI-PDR)**

Ref: (a) COM COGARD PSC Arlington VA 022006Z JUN 10/ [ALCGPSC](#) 045/10

Introduction Per reference (a), this E-Mail ALSPO message transmits procedures to obtain EI-PDR access, scan, forward, and verify EI-PDR documents, and a software user guide.

**WebNow™
Software** EI-PDRs are stored in a document imaging system repository. WebNow is an internet browser-based software application which facilitates access to the repository. As a browser-based application, WebNow does not require installation on the standard workstation; it functions within Internet Explorer.

**WebNow
Account Access
and
Deactivation** Enclosure (1) provides the procedure for requesting WebNow access. It also provides the procedures for WebNow password resets and access terminations.

Note: WebNow account deactivation is currently a manual process. SPOs must notify PPC Customer Care upon a WebNow user's transfer, separation or relief.

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E-Mail ALSPO C/10

**Subj: SPO ACCESS TO ELECTRONICALLY IMAGED PERSONNEL DATA
RECORDS (EI-PDR)**

**Scanning and
Verification
Process**

Enclosure (2) provides the criteria and quality-control procedures to identify, scan, e-mail, and verify updates of documents forwarded to PSC for inclusion in a member's EI PDR.

**Software User
Guide**

Enclosure (3) provides the procedures for accessing, viewing, printing, saving and exporting WebNow records.

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://www.uscg.mil/ppc/ccb/> (Online Trouble Ticket/Inquiry Form)



PPC-DG-CustomerCare@uscg.mil (E-Mail)

Released by

Internet release authorized.

/s/

J. D. PHILLIPS, CAPT, USCG
Commanding Officer

Note: Enclosures to this E-Mail ALSPO are superseded by an update to the **Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3, Part X, Error Feedback, Reports and Queries, Chapter 4, SPO Access to the Electronically Imaged PDR (EI-PDR)**. The chapter is attached to this E-Mail ALSPO in place of the enclosures.

Encl: ~~(1) [WebNow Account Access and Deactivation](#)~~
~~(2) [SPO PDR Scanning and Verification Process Guide](#)~~
~~(3) [Servicing Personnel Office WebNow User Guide](#)~~

Copy: COMDT (CG-634)
CG PSC (bops, psd)

PPC SPO Manual

Part X, Error Feedback, Reports and Queries

Chapter 4, SPO Access to the Electronically Imaged PDR (EI-PDR)

Overview

Introduction This chapter provides procedures to obtain EI-PDR access, scan, forward, and verify EI-PDR documents, and a software user guide.

WebNow™ Software EI-PDRs are stored in a document imaging system repository. WebNow is an internet browser-based software application which facilitates access to the repository. As a browser-based application, WebNow does not require installation on the standard workstation; it functions within Internet Explorer.

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Error Feedback, Reports and Queries

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WebNow Account Access and Deactivation

Introduction This section provides instructions and procedures for a Servicing Personnel Office (SPO) to obtain and deactivate WebNow/ImageNow accounts.

Reference (a) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2A

Responsibilities The Branch Chief in which the SPO is located or the next senior member within the chain of command is the approving authority for WebNow Access and Deactivation requests for the SPO Supervisor.

The SPO Supervisor is the approving authority for WebNow Access and Deactivation requests for other personnel assigned to the SPO.

The Coast Guard Pay & Personnel Center (PPC) Topeka receives and processes WebNow and Direct Access User Authorization and Deactivation forms. PPC will also maintain a list of the SPO Supervisors and “next senior member” to verify requests have been approved at the appropriate level.

PSC-BOPS-C will regularly monitor accounts for proper access and recommend removal.

Discussion The purpose of a SPO WebNow account is for “official business only” access to the EI-PDR in order to comply with COMDTINST M1080.10 (series).
EI-PDR

Once missing documents in the EI-PDR are identified, the SPO will scan and send the documents to PSC-PSD-MR for inclusion in the EI-PDR. This process is identified in the guide “SPO PDR Scanning and Submission Procedures”.

A SPO WebNow account is issued with “read-only” access, and is restricted to only those SPO personnel who perform SPO PDR duties.

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WebNow Account Access and Deactivation, Continued

SPO Procedures to establish a WebNow account

Step	Action	Remarks
1	Ensure member has CGHRS access in Direct Access	See Part I, Chapter 2, DA SPO User Roles and Access (HRS/HRSUP), of this manual.
2	Complete forms CG-7421B and CG-7421D and FAX to PPC.	<p>Both of these required forms can be found on PPC's website located at: http://www.uscg.mil/ppc/forms/. See pages 5 and 6 for samples of completed forms.</p> <p>Forms must be faxed to PPC Topeka at (785) 339-2297.</p> <p>Reminder: When completing form CG-7421B, Direct Access Authorization and Payment Approving Official (PAO) Designation, mark user roles in block 7 that you currently hold and wish to retain. Each new authorization/designation form supersedes previous authorizations and designations. Users at the Academy and TRACEN SPOs may have additional roles. If you are unsure about the roles you currently hold, refer to the user access form you most recently submitted or run the DA User Role Query. For procedures see: http://www.uscg.mil/ppc/ps/self_service/commands/user_role_query.htm</p>
3	Receive confirmation from PPC that your WebNow account has been established.	<p>You will receive an email from PPC stating that your WebNow account has been established and provided a User ID and Password. Your User ID will be your EMPLID.</p> <p>Additionally, the "SPO IPDR" button on the Direct Access "CG Member Info Page" will be enabled (colored vice gray).</p>
4	Properly file the WebNow user access forms.	Each SPO shall file the CG-7421B and the CG-7421D forms for the duration the member has account access. Once requests for deactivation of the account have been completed the original "activation" requests can be destroyed.

Continued on next page

WebNow Account Access and Deactivation, Continued

SPO Procedures to Deactivate a WebNow account

Step	Action	Remarks
1	Complete and submit a PPC Customer Care Trouble Ticket.	<p>It is the member and the member's supervisor responsibility to ensure accounts are deactivated immediately upon transfer/reassignment, or in cases of violation of the official use restriction. Deactivation is required even when transferring to another SPO office.</p> <p>A PPC Customer Care Trouble Ticket can be found on PPC's Website at: http://www.uscg.mil/ppc/ccb/.</p> <p>A sample Trouble Ticket is shown in this section</p>

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WebNow Account Access and Deactivation, Continued

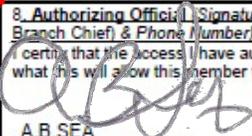
SPO WebNow Help Contacts

Problem	Contact	Remarks
WebNow is not loading after pressing the "DOCS" button	Wait – initial load of WebNow application make take up to two minutes.	The new version of WebNow may take a while to load initially. However, once it loads and you are logged in, your response time should be normal.
Initial WebNow Account Login problem or the "DOCS" button is not enabled.	PPC Customer Care Branch at 866-PPC-USCG (772-8724)	Contact the PPC Customer Care Branch if the WebNow account is not established within 3 days after FAXing the CG-7421B and the CG-7421D forms.
WebNow Password Resets or hard error messages.	Submit a PPC Customer Care Trouble Ticket	<p>PPC will provide password resets for WebNow UserIDs. They will also collect and forward all trouble issues outside of their support level to CG-631 for action.</p> <p>For Password resets or other errors messages, submit a PPC Customer Care Trouble Ticket from PPC's Website at: http://www.uscg.mil/ppc/ccb/.</p> <p>See example in this section for both password and error message issues.</p>

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WebNow Account Access and Deactivation, Continued

CG-7421B Sample – Direct Access User Access Authorization (Add CGSIPDR role)

U.S. DEPARTMENT OF HOMELAND SECURITY U. S. Coast Guard CG-7421B (Rev. 06-10)		DIRECT ACCESS USER ACCESS AUTHORIZATION AND PAYMENT APPROVING OFFICIAL (PAO) DESIGNATION	
1. User's Name (Last, First, MI.) (Please print or type) BOLINSKI, JOSEPH, P		2. Rank/Rate: YN1/E6	3. Employee ID # 1234567
4. Dept ID & Unit Name (Include Staff Symbol) 003406 PSSU MYCITY, US		5. Area Code & Phone Number: 212-555-1212 EXT. 1234	
		6. e-Mail address: joseph.p.bolinski@uscg.mil	
7. User Role Description (Note: See Chapter 1 of the Personnel and Pay Procedures Manual, PPCINST M1000.2(series) for an explanation of user roles common to field units). (Include current roles, this authorization supersedes all of your previous authorizations):		<p>Revocation: Direct Access Roles are automatically terminated upon PCS, separation, retirement, reassignment of duties (Fleet-Ups) and change of organization (inter-office transfer).</p> <p>Users who have been reassigned (PCS, Change of Department IDs) will retain Self-Service access.</p> <p>The user role termination process is kicked off by submission of a PCS departing endorsement. If the member submits a new access form, and it is processed by PPC before the SPO submits the PCS departing endorsement, the system will terminate the new access. Please be sure to submit transactions in a timely manner.</p> <p>If Revocation is due to reasons other than those listed above contact PPC Customer Care via on-line trouble-ticket at http://www.uscg.mil/ppc/ccb or http://cgweb.ppc.uscg.mil/ccb/ or via email at PPC-DG-CustomerCare@uscg.mil</p>	
<input type="checkbox"/> CGSSCMD--Command User (evals, drills, Airport Terminal, etc.) <input type="checkbox"/> CGEMPREV -- Employee Review Only (not needed if you have CGSSCMD or CGHRS) <input type="checkbox"/> CGRSVDRL -- Schedule, Edit and Approve Reserve IDT Drills (Only) <input type="checkbox"/> CGRSVMGR -- Create, review, and endorse requests for reserve orders. <input type="checkbox"/> CGAIRTRM--Airport Terminal Only (Relocation Specialists/Housing Office) <input type="checkbox"/> CGFIELDADM--Unit with access to Member Competencies (Quals, Awards & Schools) (Route request through your Servicing Personnel Office -- Per Pay & Personnel Procedures Manual, PPCINST M1000.2(series), Chap 1.) <input checked="" type="checkbox"/> CGGWIS--Global Workforce Inquiry System (Provides View Only Access to Personal Data) <input checked="" type="checkbox"/> CGHRS -- (SPO) DEPT ID 003406 (See Chapter 1 of the Personnel and Pay Procedures Manual, PPCINST M1000.2(series) for rules) <input type="checkbox"/> CGAPPL -- Applicant Data (Use with CGHRS for accessions. This role is necessary to create applicant IDs. Cannot be selected with CGHRSUP.) <input checked="" type="checkbox"/> CGHRSUP--(SUPERVISOR, Payment Approving Official (PAO)) (Application must be approved by PPC (MAS)). (See Chapter 1 of the Personnel and Pay Procedures Manual, PPCINST M1000.2(series)) <input checked="" type="checkbox"/> CGSIPDR (SPO Supervisor/Auditor Access to the EI-PDR via WebNow - also complete form CG-7421D) PPC (MAS) PAO Designation Approved by (name/signature): _____ Date: _____ <input type="checkbox"/> CGMRS -- Medical Readiness System Clinical Access (Med care providers) <input checked="" type="checkbox"/> CGTRNOFF -- Electronic Training Request (ETR). Unit ESOs. <input type="checkbox"/> CGFTESO -- Unit Educational Services Officer. Unit ESOs. <input type="checkbox"/> CGSECURN--Unit Security Manager (View Only) <input type="checkbox"/> CGSECUVW--Area/Dist Security Manager (View Only). Fax completed form to COMDT (CG-86) at 202-372-3950 for approval. CG-86 will forward to PPC. CG-86 Name/Sign: _____ Date: _____ <input type="checkbox"/> CGTRNFAC--Training Center (TAS Course Sessions) <input type="checkbox"/> CGTRNTQC--TQC/TAS Course Scheduler <input type="checkbox"/> CGASGN--CGPSC (epm/opm/rpm) or District/PSSU Reserve Assignment Officer <input type="checkbox"/> CGRSVISC/CGRSVORD--Reserve Orders Approval/Funding, District (r)/PSSUs only. <input checked="" type="checkbox"/> Others Not Listed. Please describe (in the space below) what you need to access in Direct-Access. CGSIPDR			
8. Authorizing Official: Signature & Typed or printed name, Rank, Title (CO/OIC, XO/XPO or HQ/DCMS/CGPSC/FORCECOM/OPCOM/DIST Branch Chief & Phone Number):  I certify that the access I have authorized is based on an official need. I'm aware of the general functionality I have authorized and I'm aware of what this will allow this member to complete. If this is for a contractor, the Contracting Officer's Technical Representative (COTR) signs as AO.		9 Date: 10 JUN 2010	
A.B. SEA Signature AND PRINTED or TYPED Name,		CW03 SPO Sup. 212-555-1212 1034 Rank, Title, Area Code & Phone (ext)	

Reminder: Mark user roles in block 7 that you currently hold and need to retain. Each new authorization/designation form supersedes previous authorizations and designations. Run the DA User Role Query if you are unsure of the roles you currently hold.

The DA user role for WebNow access is "CGSIPDR". It only appears on versions of the form revised in Jun 2010 or later. If using the Feb 10 version of the form, request the CGSIPDR role by listing the role name in the **Others Not Listed** section

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WebNow Account Access and Deactivation, Continued

CG-7421D Sample - ImageNow User Access Authorization Form

Please fill out online or print neatly! This authorization supercedes previous applications.

U.S. DEPARTMENT OF HOMELAND SECURITY U. S. Coast Guard CG-7421D (Rev. 05-10)		IMAGENOW USER ACCESS AUTHORIZATION	
1. User's Name (Last, First, MI.) (Please print or type) Blonski, Joseph P.		2. Rank/Rate: E6/YN1	3. Employee ID # (Not SSN) 1234567
4. Dept ID & Unit Name (include Staff Symbol) 003406 PSC-bops-c	5. Area Code & Phone Number: 202-555-1212	6. e-Mail address: Joseph.P.Blonski@uscg.mil	
7. User Role Description (Include current roles, this authorization supercedes all of your previous authorizations):			
PPC General:			
RAS: <input type="checkbox"/> Accounting Techs <input type="checkbox"/> Act/Res Pay Techs <input type="checkbox"/> Annuitant Pay Techs <input type="checkbox"/> Admin <input type="checkbox"/> Supervisor/Auditors <input type="checkbox"/> View & Print <input type="checkbox"/> View Only		FAR: <input type="checkbox"/> Records Review – KS <input type="checkbox"/> Member Record Review OTHER: (describe below) _____	
SES: <input type="checkbox"/> ADT <input type="checkbox"/> IDT <input type="checkbox"/> SOCS <input type="checkbox"/> ADT View & Print <input type="checkbox"/> IDT View & Print <input type="checkbox"/> SOCS View & Print <input type="checkbox"/> ADT View Only <input type="checkbox"/> IDT View Only <input type="checkbox"/> SOCS View Only			
TVL: <input type="checkbox"/> Claim Examiners <input type="checkbox"/> System Support <input type="checkbox"/> View & Print <input type="checkbox"/> View Only			
Security Administrators:		Administrators:	
<input type="checkbox"/> CS User Auth – DA & JUMPS User Auth Forms <input type="checkbox"/> ID AIS		<input type="checkbox"/> ImageNow Administrator <input type="checkbox"/> Scanners	
HQs/PSC/SPOs:			
DC Users of the Boardroom Software*		SPO Supervisors and Auditors *	
<input type="checkbox"/> Boardroom Users		<input checked="" type="checkbox"/> SPO IPDR	
DC Scan, Link, QC and Board Administrators *		DC Member Record Review & Audit Remediation *	
<input type="checkbox"/> Delete Capabilities <input type="checkbox"/> HR Document Processors		<input type="checkbox"/> Records Review/Audit	
DC Assignment Officers; Member Info Access*		HQ's DA User Auth Forms	
<input type="checkbox"/> Detailers		<input type="checkbox"/> HRDC USER AUTH	
OPM3 – Employee Review *		* Requires completion of Direct Access User Access Authorization form (CG-7421B). Select 'Other' above and write in 'WEBNOW or IMAGENOW'. Users outside of PPC or PSC need PSC-BOPS approval.	
<input type="checkbox"/> OPM3			
8. Authorizing Official (Signature & Typed or printed name, Rank, Title (CO/DIC, XO/XPO or HQ/DCMS/CGPSC/FORCECOM/OPCOM/DIST Branch Chief) & Phone Number): I certify that the access I have authorized is based on an official need. I'm aware of the general functionality I have authorized and I'm aware of what this will allow this member to complete. If this is for a contractor, the Contracting Officer's Technical Representative (COTR) signs as AO.			
Signature, PRINTED or TYPED Name, Rank, Title (see instructions), Phone <i>I.M. Daboss</i> I.M. Daboss CDR Branch Chief 202-555-1213			9. Date: 5/12/2010
Privacy Act Statement			
AUTHORITY: Executive Order 10450, 9397; and Public Law 99-474, the Computer Fraud and Abuse Act. PRINCIPAL PURPOSE: To record names, signatures, and other identifiers for the purpose of identifying individuals requesting access to U. S. Coast Guard (USCG) systems and information. NOTE: Records may be maintained in both electronic and/or paper form. ROUTINE USES: None. DISCLOSURE: Disclosure of this information is voluntary; however, failure to provide the requested information may impede, delay or prevent further processing of this request.			
Acknowledgment: I understand that I am authorized to access the ImageNow/WebNow system and that accessing it for purposes beyond the Scope of Authorization is a violation of Federal law (18 U.S.C. 1030 et al) (Note: Refer to the Automated Information Systems (AIS) User Acknowledgement Form (CG-5500A), which is required for all U.S. Coast Guard AIS users, it contains the full Scope of Authorization and Acknowledgement.)			
10. User's Signature: <i>Joseph P. Blonski</i>		11. Date: 5/12/2010	Fax to: (785) 339-2297
Revocation Procedure:			
ImageNow access must be terminated upon PCS, separation, retirement, reassignment of duties (Fleet-Ups) and change of organization (inter-office transfer). Contact PPC Customer Care via on-line trouble-ticket at http://www.uscg.mil/ppc/ccb or http://caweb.ppc.uscg.mil/ccb/ or via email at PPC-DG-CustomerCare@uscg.mil for all ImageNow account revocations.			

U.S. DEPT. OF HOMELAND SECURITY, USCG, CG-7421D (Rev. 05-10)

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WebNow Account Access and Deactivation, Continued

Sample PPC Customer Care WebNow Account Deactivation Trouble Ticket

Employee ID #:	<input type="text" value="2345678"/>	
Non-Employees: Contractors and other non-employees should enter the User ID assigned when their account was established.		
E-Mail:	<input type="text" value="lma.N.Charge@uscg.mil"/>	
First Name:	<input type="text" value="lma"/>	
Last Name:	<input type="text" value="Charge"/>	
Title, Rate or Rank:	<input type="text" value="CWO4"/>	
Daytime Telephone: (Include area code & ext.)	<input type="text" value="202-555-1212"/>	
Member/Employee Information Who is this ticket for?		
Employee ID #:	<input type="text" value="123456"/>	
First Name:	<input type="text" value="Joseph"/>	
Last Name:	<input type="text" value="Blonski"/>	
Problem/Issue Information		
User Role for this issue:	<input type="text" value="I am a Command, SPO or ADMIN support user"/>	
Category:	<input type="text" value="PERSONNEL ACTION"/>	
Type:	<input type="text" value="OTHER PERS ACTION NOT LISTED"/>	
Reason:	<input type="text" value="OTHER-NOT LISTED"/>	
Please enter a description of the problem or the requirements for the ADHOC report request For password resets be sure to include your user ID if it's not the same as your employee ID.		
<p>FOR PCS TRANSFERS/SEPARATIONS:</p> <p>Please Deactivate YN1 Joseph Blonski's WebNow account. His WebNow UserID is 1234567.</p> <p>FOR OTHER REASONS (DISCIPLINARY, ETC.)</p> <p>Please Deactivate YN1 Joseph Blonski's WebNow account and Remove his Direct Access role CGSPDR. His WebNow UserID is 1234567 and his Direct AccessUserID is 1234567.</p>		

WebNow Account Access and Deactivation, Continued

Sample PPC Customer Care Password Reset and WebNow Error Trouble Ticket

Employee ID #:	<input type="text" value="1234567"/> 
E-Mail:	<input type="text" value="Joe.P.Blonski@uscg.mil"/> 
First Name:	<input type="text" value="Joe"/> 
Last Name:	<input type="text" value="Blonski"/> 
Title, Rate or Rank:	<input type="text" value="YN3"/> 
Daytime Telephone: (Include area code & ext.)	<input type="text" value="202-555-1212"/> 
Member/Employee Information <small>Who is this ticket for?</small>	
<input checked="" type="checkbox"/> Same as contact information?	
Employee ID #:	<input type="text" value="123456"/> 
First Name:	<input type="text" value="Joe"/> 
Last Name:	<input type="text" value="Blonski"/> 
Problem/Issue Information	
User Role	<input type="text" value="I am the Member/User (self-service issue)"/>
Category:	<input type="text" value="MBR-SS PASSWORD/USER ACCESS"/>
Type:	<input type="text" value="OTHER-NOT LISTED"/>
Reason:	<input type="text" value="OTHER-NOT LISTED"/>
<p>Please enter a description of the problem or the requirements for the ADHOC report request For password resets be sure to include your user ID if it's not the same as your employee ID.</p>	
<p>Password Problem:</p> <p>I cannot access WebNow with my password. Please provide me with a password to login to WebNow. My UserID is 1234567.</p> <p>For Error Message Problems:</p> <p>After logging into WebNow, I receive the following error message: (Write down the exact message you are receiving).</p>	

SPO PDR Scanning and Verification Process

Introduction This section provides a Servicing Personnel Office (SPO) the criteria and quality-control procedures to identify, scan, e-mail, and verify updates of documents forwarded to PSC for inclusion in a member's EI-PDR.

Reference (a) Military Personnel Data Records System, COMDTINST M1080.10(series)

Responsibilities The SPO Supervisor has oversight responsibility to ensure documents contained in the SPO PDR match documents authorized for placement in the Electronically Imaged (EI) PDR.

SPOs will review the EI-PDR to identify missing documents. Missing documents will be scanned and forwarded to PSC-PSD-MR for inclusion in the EI-PDR. SPO Personnel must ensure documents sent to PSC have been added to the EI-PDR within the established timelines.

The SPO will identify equipment capable of scanning all required documents as prescribed in this process guide. If no scanner is currently available it is the SPO's responsibility to procure one for this process.

The PSC-PSD-MR Branch will review documents forwarded by a SPO to ensure proper format and readability prior to adding the document into the EI-PDR.

Discussion This section provides instructions and criteria required to identify, label, scan, e-mail, and follow-up on all documents sent to PSC-PSD-MR for inclusion in the EI-PDR.

Familiarization with the Military PDR System COMDTINST M1080.10(series) is essential to this process. There are documents kept in the SPO PDR that are not required in the EI-PDR and vice versa.

Consequently, any documents sent to PSC-PSD-MR that are not required in the EI-PDR will not be added or returned. Additionally, all documents required in the EI-PDR may not be authorized in the SPO PDR, and therefore may not be visible to the user at the SPO (i.e. OERS, etc).

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SPO PDR Scanning and Verification Process, Continued

SPO Procedures

Step	Action	Remarks																
1	Identify and Label Documents prior to Scanning	<p>Review COMDTINST M1080.10(series) to ensure the document is authorized in the EI-PDR. The PSC-psc-mr Branch constantly receives unauthorized EI-PDR documents that are ultimately shredded.</p> <p>For documents that do not contain an EMPLID, write the EMPLID on the upper right hand corner of the document. All documents relating to a member's dependents (e.g., birth certificates, adoption papers, etc.) must contain the member's EMPLID and relationship such as EMPLID – Spouse, EMPLID – Child, or EMPLID – Parent.</p>																
2	Scan documents	<p>The below criteria applies to scanned documents:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Criteria</th> <th style="width: 70%;">Description</th> </tr> </thead> <tbody> <tr> <td>One member's record per scanned file</td> <td>Multiple documents for the same member are allowed. Do not include documents for more than one member per .pdf file. The scanned file name will be the member's EMPLID (e.g., "1234567.pdf").</td> </tr> <tr> <td>Adobe (.pdf) format</td> <td>This is the required format for documents to ensure they can be opened by PSC-PSD-MR. The Adobe documents must be legible and of good quality.</td> </tr> <tr> <td>Less than 10MB file size</td> <td> <p>Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.</p> <p>Use the guide below to compress Adobe files:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Step</th> <th style="width: 90%;">Action</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>With your file open in Adobe, select "Document" → "Reduce File Size" from the Menu Bar.</td> </tr> <tr> <td style="text-align: center;">2</td> <td>In the "Reduce File Size" Window next to "Make Compatible With", press the "dropdown arrow" and select "Acrobat 8.0 and higher", press "OK"</td> </tr> <tr> <td style="text-align: center;">3</td> <td>When saving the file, give it the member's EMPLID (i.e. 1234567.pdf) as the name.</td> </tr> </tbody> </table> </td> </tr> </tbody> </table>	Criteria	Description	One member's record per scanned file	Multiple documents for the same member are allowed. Do not include documents for more than one member per .pdf file. The scanned file name will be the member's EMPLID (e.g., "1234567.pdf").	Adobe (.pdf) format	This is the required format for documents to ensure they can be opened by PSC-PSD-MR. The Adobe documents must be legible and of good quality.	Less than 10MB file size	<p>Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.</p> <p>Use the guide below to compress Adobe files:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Step</th> <th style="width: 90%;">Action</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>With your file open in Adobe, select "Document" → "Reduce File Size" from the Menu Bar.</td> </tr> <tr> <td style="text-align: center;">2</td> <td>In the "Reduce File Size" Window next to "Make Compatible With", press the "dropdown arrow" and select "Acrobat 8.0 and higher", press "OK"</td> </tr> <tr> <td style="text-align: center;">3</td> <td>When saving the file, give it the member's EMPLID (i.e. 1234567.pdf) as the name.</td> </tr> </tbody> </table>	Step	Action	1	With your file open in Adobe, select "Document" → "Reduce File Size" from the Menu Bar.	2	In the "Reduce File Size" Window next to "Make Compatible With" , press the "dropdown arrow" and select "Acrobat 8.0 and higher" , press "OK"	3	When saving the file , give it the member's EMPLID (i.e. 1234567.pdf) as the name.
Criteria	Description																	
One member's record per scanned file	Multiple documents for the same member are allowed. Do not include documents for more than one member per .pdf file. The scanned file name will be the member's EMPLID (e.g., "1234567.pdf").																	
Adobe (.pdf) format	This is the required format for documents to ensure they can be opened by PSC-PSD-MR. The Adobe documents must be legible and of good quality.																	
Less than 10MB file size	<p>Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.</p> <p>Use the guide below to compress Adobe files:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Step</th> <th style="width: 90%;">Action</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>With your file open in Adobe, select "Document" → "Reduce File Size" from the Menu Bar.</td> </tr> <tr> <td style="text-align: center;">2</td> <td>In the "Reduce File Size" Window next to "Make Compatible With", press the "dropdown arrow" and select "Acrobat 8.0 and higher", press "OK"</td> </tr> <tr> <td style="text-align: center;">3</td> <td>When saving the file, give it the member's EMPLID (i.e. 1234567.pdf) as the name.</td> </tr> </tbody> </table>	Step	Action	1	With your file open in Adobe, select "Document" → "Reduce File Size" from the Menu Bar.	2	In the "Reduce File Size" Window next to "Make Compatible With" , press the "dropdown arrow" and select "Acrobat 8.0 and higher" , press "OK"	3	When saving the file , give it the member's EMPLID (i.e. 1234567.pdf) as the name.									
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SPO PDR Scanning and Verification Process, Continued

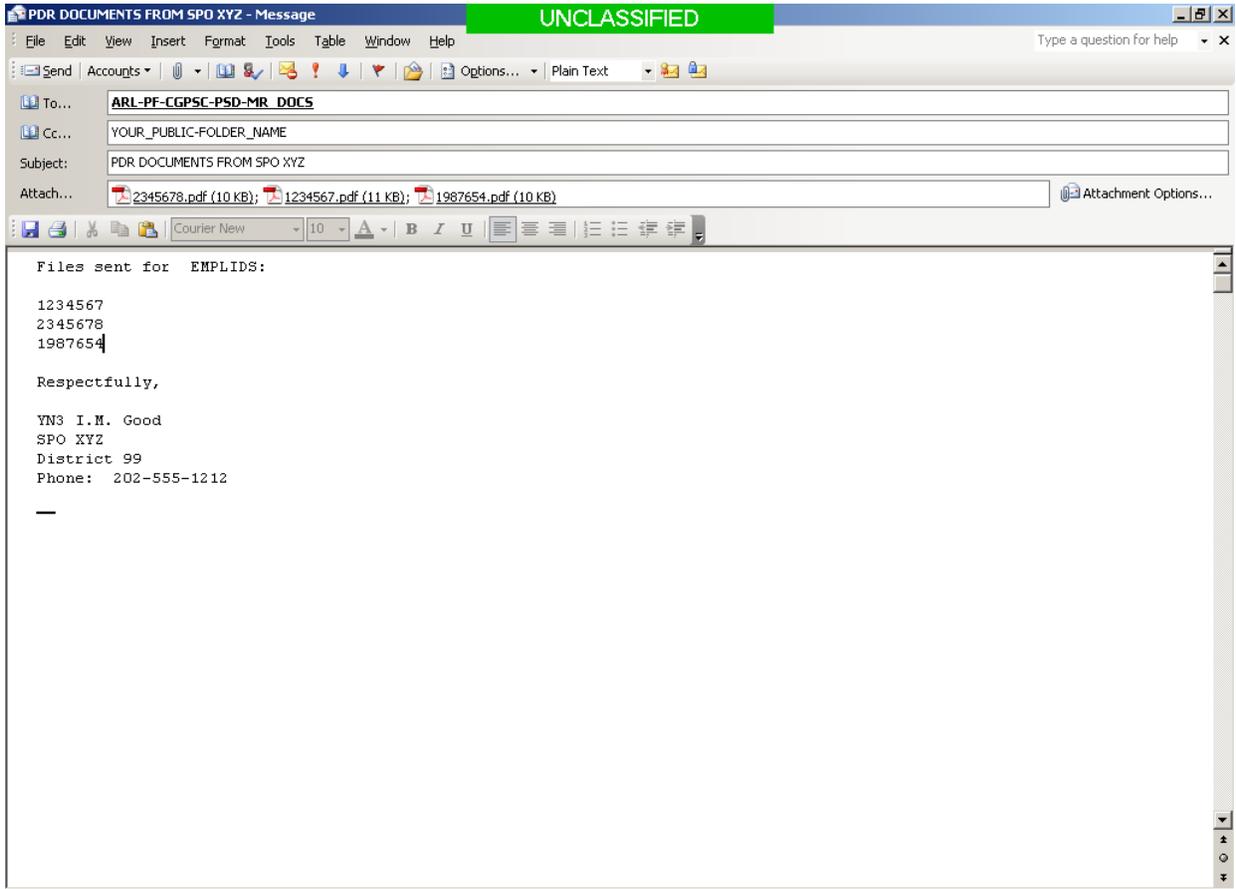
SPO Procedures (continued)

Step	Action	Remarks
3	E-mail documents to ARL-PF-CGPSC-PSD-MR_DOCS	<p>A sample forwarding e-mail is shown on page 4.</p> <p>Read receipt of the forwarding e-mail is strongly encouraged. To request a read receipt, check box under Options for “Request a read receipt for this message” prior to sending.</p> <p>Do not encrypt the message. Encrypted emails cannot be opened once delivered to the PSC folder. Per DHS and Coast Guard Policy, PII information which is considered "Sensitive But Unclassified" (SBU) requires no special handling (encryption/password protection) when sent from/to "uscg.mil" or "dhs.gov" addresses.</p>
4	Save forwarding e-mail to file tracking folder.	<p>Each SPO shall create a centralized “public e-mail” folder to store e-mails sent to the PSC-PSD-MR. You will need to submit a help ticket to your local ESU/ESD IT helpdesk to have this done.</p> <p>The ARL-PF-CGPSC-PSD-MR_DOCS public e-mail folder is a good example of a “public folder e-mail name”. A sample e-mail to PSC-PSD-MR with attachments is shown on the next page.</p>
5	Verify documents were filed in member’s EI-PDR	<p>After 14 days, the SPO must verify that documents forwarded to the PSC-PSD-MR Branch are filed in the member’s EI-PDR. This action requires comparing e-mails and Adobe files stored in the SPO central folder to EI-PDR contents. (See “SPO WebNow User Guide” for information on how to access/use WebNow).</p> <p>Sorting documents in WebNow by the “Date Created” is a good method for doing your comparison. This will move the most recently added documents to the top.</p> <p>Purge your SPO public e-mail folder contents upon verification of EI-PDR inclusion.</p>
6	Contact the PSC-PSD-MR Branch as needed	<p>If 14 days have passed and documents are discovered not properly filed in a member’s EI-PDR as part of the verification process above, send an e-mail to the PSC-PSD-MR Branch, harrison.j.morten@uscg.mil, with a list of documents sent but not filed.</p> <p>Send an e-mail to the PSC-PSD-MR Branch COTR, charles.a.thompson2@uscg.mil, if the problem remains unresolved after 3 business days.</p>

Continued on next page

SPO PDR Scanning and Verification Process, Continued

Sample SPO EI-PDR Forwarding E-mail



SPO WebNow User Guide

Introduction This Guide provides a Servicing Personnel Office (SPO) the information and procedures necessary to access, view, print, and export EI-PDR documents using Direct Access and WebNow.

Prerequisites for Using WebNow The following items are required to access SPO WebNow records;

- A SPO WebNow account with User ID and password
- A Direct Access account with the role(s) for accessing WebNow
- Access to the Coast Guard’s Data Network

Note - If you do not have the above access, see the “SPO WebNow Account Access and Deactivation Guide” to obtain it.

Discussion The purpose of a SPO WebNow account is for “official business only” which is to comply with COMDTINST M1080.10(series). Additionally, the SPO cannot provide a "complete" copy of a member's record due to their limited access. However, members can still obtain a copy of their EI-PDR from PSC-PSD-MR per this link: <http://www.uscg.mil/psd/mr>

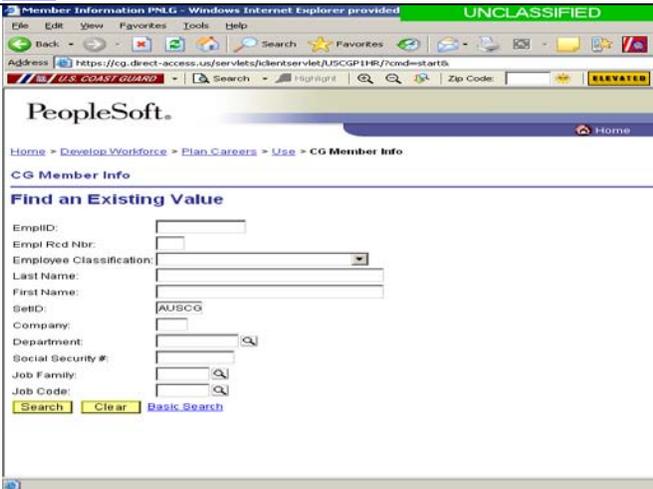
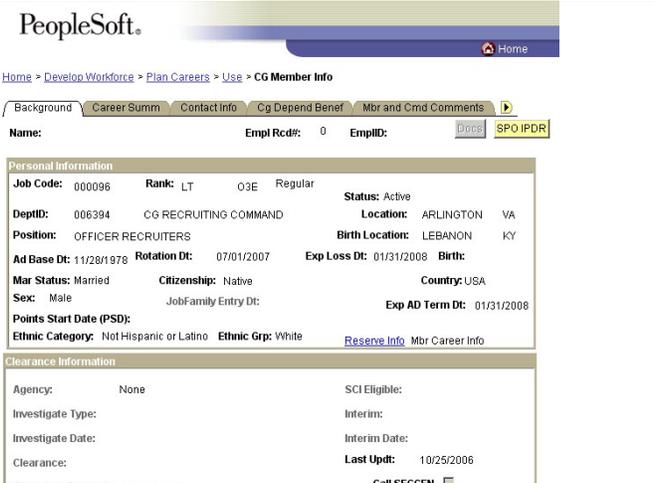
A SPO WebNow account is issued with “read-only” access.

Contents The following topics are covered in this guide:

Topic	See Page
Accessing WebNow Documents	X-4-16
Viewing WebNow Records	X-4-18
Printing WebNow Records	X-4-20
Exporting WebNow Records	X-4-21

SPO WebNow User Guide, Continued

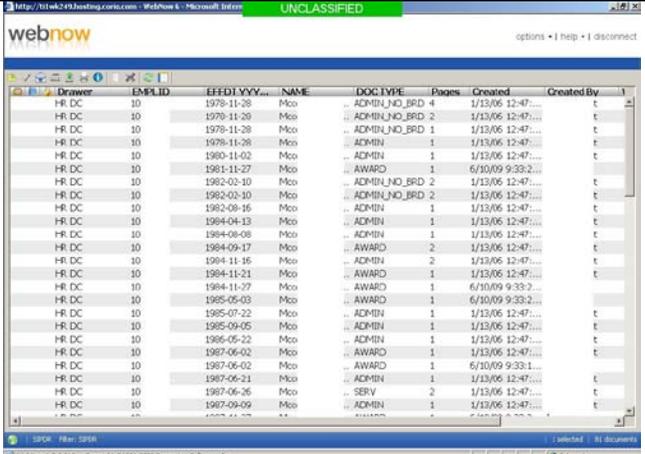
Accessing WebNow Documents

Step	Action	Remarks
1	Login to Direct Access (PeopleSoft) with your User ID and password	Go to https://ep.direct-access.us/
2	Proceed to the CG Member Info Search Page	Go to Direct Access Content > Develop Workforce > Plan Careers > Use > CG Member Info
3	Type the Member's Employee ID in the block marked EmplID and press the "Search" button. This will bring up the members' record in Direct Access.	
4	Press the yellow "SPO IPDR" button located in the upper-right corner of the page. <i>Note – If the "SPO IPDR" button is not enabled (grey vice yellow), you do not have the proper roles in Direct Access to access WebNow. See prerequisites above for using WebNow.</i>	

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SPO WebNow User Guide, Continued

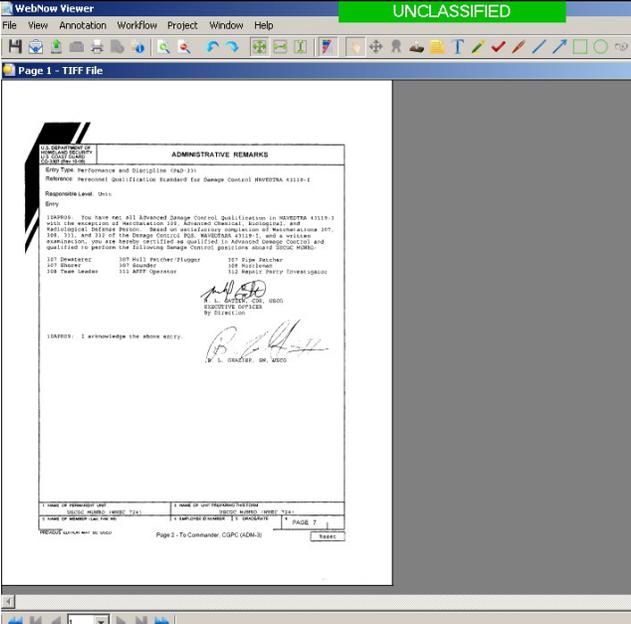
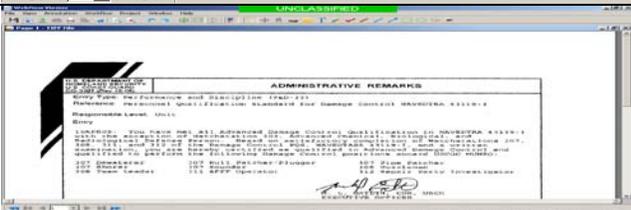
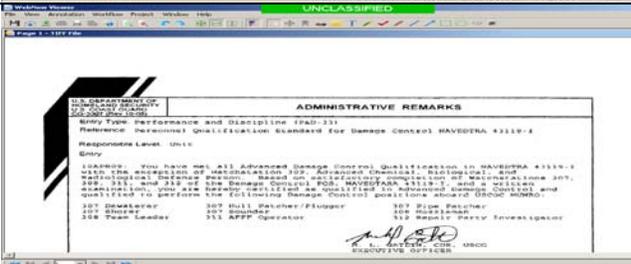
Accessing WebNow Documents (continued)

Step	Action	Remarks
5	<p>After pressing the “DOCS” button, a new window should appear with the WebNow Login Screen (see diagram on right).</p> <p><i>Note - WebNow may take a while to load initially</i></p>	
6	<p>Enter your WebNow User Name and Password and press the “Connect” button.</p>	<p><i>Note – Your User ID is your Employee ID</i></p>
7	<p>You should now see a screen that looks similar to the one at the right.</p>	

Continued on next page

SPO WebNow User Guide, Continued

Viewing WebNow Records

Step	Action	Remarks
1	<p>To view the contents of a member’s document, simply “double-click” the document on the grid list you want to view. (Default view is entire page).</p> <p>Once opened, use the options provided on the Page toolbar (located at the bottom of the screen) to move between pages in your document.</p>	 <p>The screenshot shows the 'WebNow Viewer' application window. The title bar indicates the document is 'UNCLASSIFIED'. The main content area displays a document page titled 'ADMINISTRATIVE REMARKS'. The document text includes a header, a reference to 'Performance and Discipline (PAD-33)', and a list of names and titles. There are two signatures on the page. The bottom of the window shows a toolbar with navigation icons and a page indicator showing 'Page 1 of 1'.</p>
2	<p>To enlarge the viewing size of your document press the “Fit Width” Button on the tool bar (Green ↔ button).</p>	 <p>This screenshot is similar to the first one but shows the 'Fit Width' button in the toolbar highlighted in green. The document content is larger, filling more of the window.</p>
3	<p>To close the document and return to your document list, press the “X” in the upper-most right hand corner of the window.</p> <p>Continue the process above to view the rest of the member’s documents.</p>	 <p>This screenshot shows the 'WebNow Viewer' window with the 'X' button in the upper right corner highlighted. The document content is smaller than in the previous screenshots.</p>

Continued on next page

SPO WebNow User Guide, Continued

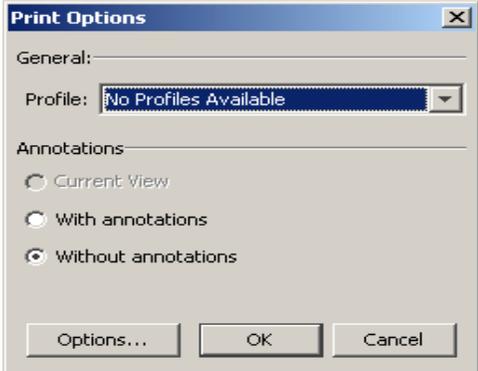
Viewing WebNow Records (continued)

Step	Action	Remarks
4	<p>To view a different member's records, you must go back to the Direct Access CG Member Info area and retrieve the next member's information.</p> <p>Once you have the next member's record up in the CG Member Info Window, press the "SPO IPDR" button and the list of records for the next member will appear in the WebNow window.</p> <p>Repeat process as often as needed.</p>	 <p>The screenshot shows the PeopleSoft interface for 'CG Member Info'. It includes a navigation bar with 'Home', 'Background', 'Career Summ', 'Contact Info', 'Cg Depend Benef', and 'Mbr and Cmd Comments'. A 'Docs' button and an 'SPO IPDR' button are visible. The 'Personal Information' section displays fields for Job Code (000096), Rank (LT O3E Regular), Status (Active), DeptID (006394 CG RECRUITING COMMAND), Location (ARLINGTON VA), Position (OFFICER RECRUITERS), Birth Location (LEBANON KY), Ad Base Dt (11/28/1978), Rotation Dt (07/01/2007), Exp Loss Dt (01/31/2008), Birth, Mar Status (Married), Citizenship (Native), Country (USA), Sex (Male), Job Family Entry Dt, Exp AD Term Dt (01/31/2008), Points Start Date (PSD), Ethnic Category (Not Hispanic or Latino), and Ethnic Grp (White). A 'Reserve Info' link and 'Mbr Career Info' are also present. The 'Clearance Information' section shows Agency (None), SCI Eligible, Investigate Type, Interim, Investigate Date, Interim Date, Clearance, and Last Updt (10/25/2006). A 'Call SECCEN' button is at the bottom right.</p>

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SPO WebNow User Guide, Continued

Printing WebNow Records

Step	Action	Remarks
1	<p>To print a single document, simply select the document you want to print by clicking on it once in the grid list.</p> <p>Once you have the document “highlighted” press the “print” button (looks like a small printer) located on the button toolbar</p>	 <p>The screenshot shows the WebNow interface with a grid of records. The record for 'Bruce L. ADMIN' is highlighted in yellow. The toolbar at the top includes a printer icon.</p>
2	<p>You will then get a print options window like the one at the right.</p> <p>If you want to print the document as it appeared in the system, press the “OK” button.</p> <p>You can add “Options” and/or print “With annotations” to your documents as well.</p>	 <p>The screenshot shows the 'Print Options' dialog box. The 'Profile' dropdown is set to 'No Profiles Available'. Under 'Annotations', the 'Without annotations' radio button is selected. Buttons for 'Options...', 'OK', and 'Cancel' are visible at the bottom.</p>
3	<p>You will then see what appears as a “Normal Windows” Print window. Select your printer and press “OK”.</p> <p>Your document will print to your selected printer.</p>	 <p>The screenshot shows the standard Windows 'Print' dialog box. The printer name is 'Xerox WorkCentre Pro 245'. The 'Print range' is set to 'All' pages from 1 to 3. The 'Number of copies' is set to 1. 'OK' and 'Cancel' buttons are at the bottom.</p>
4	<p>To print all the documents in the Grid, simply; click the document at the top, then hold down your “shift key” and press the document at the bottom. All the documents should be highlighted (selected).</p> <p>Follow the same print process listed above and all highlighted documents will be printed.</p>	 <p>The screenshot shows the WebNow grid with multiple records highlighted in yellow, indicating they are all selected for printing.</p>

Continued on next page

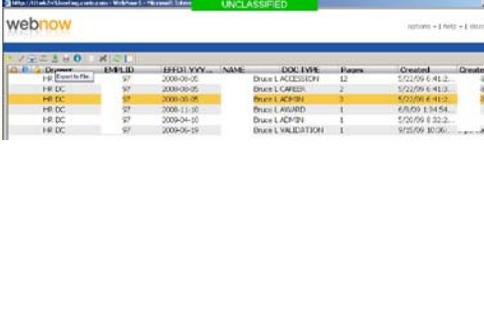
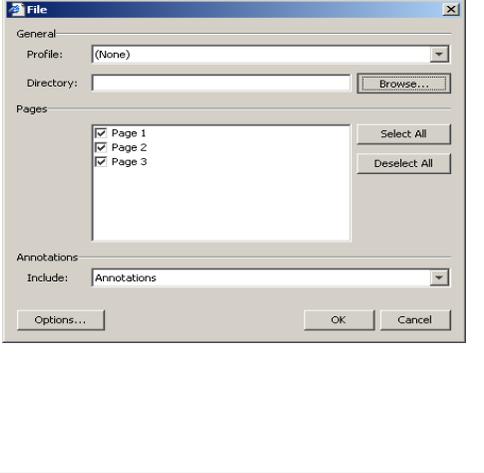
SPO WebNow User Guide, Continued

Exporting WebNow Records

Another way to make electronic copies of WebNow documents is to export them.

This process takes a few “extra steps”, but for large records it is often faster than Adobe printing and reduces the processing impact on the WebNow server.

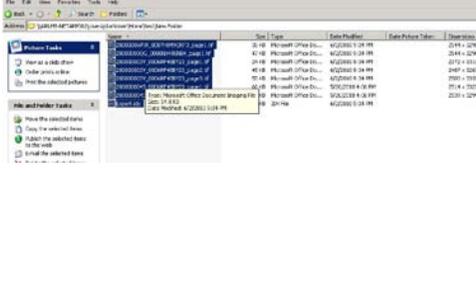
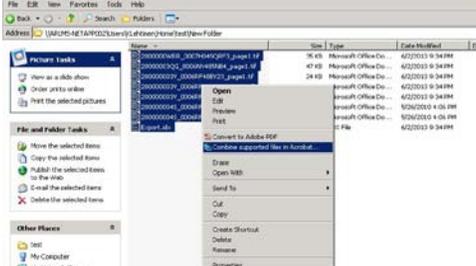
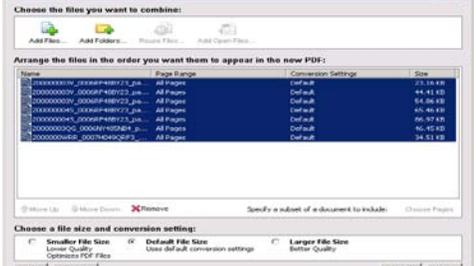
To use this method take the following steps:

Step	Action	Remarks
1	<p>Select the document/documents you want to export from the grid list.</p> <p><i>In this example only one document has been selected.</i></p> <p>Then press the “Export to File” button on the toolbar (located just to the left of the “Print” button).</p>	
2	<p>The following window will appear. The number of pages listed depends on the documents you selected above.</p> <p>You can export “some” or “all” of the pages of any document. <i>By default the window “selects all”.</i> You can de-select any pages you don’t want exported.</p> <p>You must “designate” a location for your files to be exported. You do this by pressing the “Browse” button on the right-hand side of the “Directory:” field.</p>	

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SPO WebNow User Guide, Continued

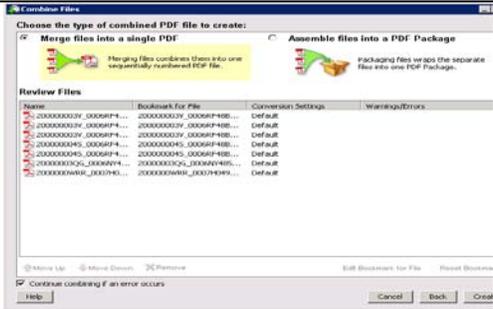
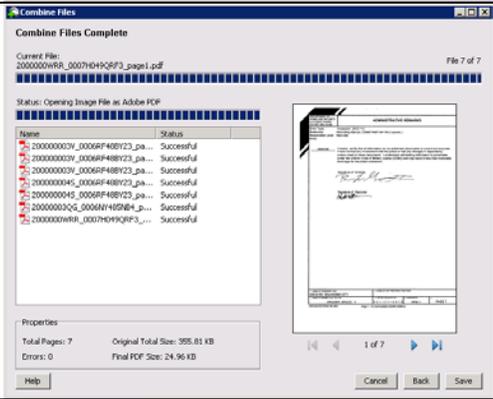
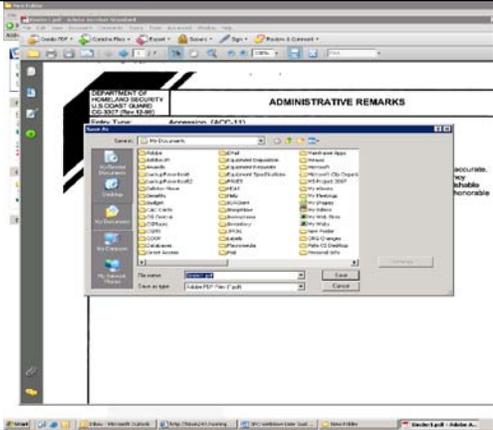
Exporting WebNow Records (continued)

Step	Action	Remarks
3	<p>When the folder menu appears, select or “create” a folder to export your files.</p> <p>To avoid confusion, it is “highly suggested” that the folder you select “is empty”.</p> <p>That way your “exported files” will not be mixed together with previous files in the folder.</p>	
4	<p>When the export function completes, the window will close. <i>You must then go to the folder where you exported your files.</i></p> <p>All files have been exported in TIF format and each TIF file represents one page of a document.</p> <p>To combine all of these files into one Adobe document, proceed to step 5.</p>	
5	<p>Select “all the documents” you exported including the index file (Export.idx).</p> <p>Position your mouse pointer over highlighted area of files and “right click”.</p> <p>From the list of options select “Combine Supported Files in Acrobat”.</p>	
6	<p>You should then see a window that looks like the one on the right.</p> <p>Accept Default settings and Press “Next”.</p>	

Continued on next page

SPO WebNow User Guide, Continued

Exporting WebNow Records (continued)

Step	Action	Remarks
7	<p>New window on right will appear.</p> <p>Accept settings to “Merge files into a single PDF” and press “Create” Button.</p>	
8	<p>You will see the files being merged in the “Combine Files” window.</p> <p>When completed press the “Save” Button.</p>	
9	<p>The “Save As” Window will appear with a default name of Binder1.pdf (with your .pdf document in the background).</p> <p>Change name and save.</p>	
10	<p>This completes the Exporting WebNow Records Function.</p>	

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