

Establishing a Servicing Personnel Office (SPO)

Introduction This guide provides the process and procedures to establish a Servicing Personnel Office (SPO).

Discussion With the approval of Phase I staffing adjustments to Peoplesoft implementation and to meet the overall objective to align the personnel and payroll actions with the decision-makers in Commands, processes and procedures are being established to effectively and timely stand-up new SPOs to ensure a smooth transition.

Reference (a) [ALCOAST 304/03, Returning Admin Support to the Field, 241454 Jun 03](#)

Process Process and timing are critical in standing up a new SPO due to the cycle cut-offs for our military payroll. The following process steps must be followed to stand-up a new SPO.

Stage	Description
1	Ensure adequate staffing at new location. <ul style="list-style-type: none"> ➤ Senior YN (E7, E8, or E9) or CWO (PERS) assigned. ➤ Sufficient number of non-supervisory technicians (civilians or YNs) <ul style="list-style-type: none"> ○ Ratio of technicians to PDRs is 1 to 144.
2	Submit memo request to Commandant (CG-102). <ul style="list-style-type: none"> • Area/District units shall submit requests via chain of command and Commander (p) MLCPAC or MLCLANT. • Headquarters units shall submit requests via chain of command and the appropriate directorate. • All requests shall identify exact OPFACs numbers and Department numbers and the number of personnel that will be serviced.
3	If request is approved: <ul style="list-style-type: none"> 3.a Identify and designate users and access levels for Direct Access per PSCINST M1000.2(series), Personnel and Pay Procedures Manual, Page 1-13. 3.b Identify and designate Payment Authorization Officials (PAO) per PSCINST M1000.2(series), Personnel and Pay Procedures Manual, Page 1-15. 3.c Identify and designate JUMPS/TOPTS users per JUMPS Analysis Manual, PSCINST M5230.3(series), Chapter 1-A. 3.d Identify stand-up date. Stand-up date will always be the 1st of the month and will require 3-update cycles (45 days) prior to stand-up upon written notification to PSC.

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Establishing a Servicing Personnel Office (SPO), Continued

Process (continued)

Stage	Description
3.e	Comply with the procedures in COMDTNOTE 5605 (Para. 5) to add the new SPO to the SDL Distribution Symbol E:b.
3.f	Create an e-mail distribution list or public folder (<i>Example: D11-DG-SectorLALB-SPO</i>). The local SWS III E-mail administrator is the point of contact, ensure senders from outside the unit can send e-mail items to the list or folder.
3.g	Submit list of key personnel, phone numbers and SPO e-mail address to PSC for inclusion on the SPO Contact List (http://cgweb.psc.uscg.mil/spocontactlist.asp).
3.h	Receive PDRs from old SPO

Submission of SPO Stand-up package to PSC (PS&R)

Fax SPO stand-up package to PSC Topeka (PS&R) at (785) 339-3772 at least thirty (30) days prior to stand-up date.

Stand-up date will always be on the 1st of the month.

Package must include:

- Authorization memo from CG-102 to stand-up SPO
 - List of exact OPFACs numbers and Department numbers that will be serviced.
 - [CG PSC-7421/2](#), DA User Authorization/Termination forms
 - [CG PSC-7421/3](#), JUMPS User Access Authorization forms
 - Point of Contact with phone number
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Establishing a Servicing Personnel Office (SPO), Continued

Submission of SPO Stand-up package to PSC (PS&R) (cont'd)

PSC coordinates stand-up by:

- Notifying SPO of new DD-OPFAC-RU
 - Updating JUMPS and DA Unit Files to reflect new organization.
 - Issuing JUMPS logons and updating Direct Access roles
 - Updating e-mail ALSPO distribution list and SPO Contact List to include new SPO
 - Sending e-mail to ALSPO distribution list to notify other SPOs of new SPO standup.
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Transition between SPOs

The old SPO should notify moving units of new SPO and that all personnel and pay actions need to be completed by an established date (Normally end of month update after official stand-up). The old SPO should also provide emergency POC for case-by-case problems.

The old and new SPOs will work Exception Reports on members that arose prior to the stand-up of the new SPO.

Example	Time line and actions	
Process & Procedures	DATE	ACTION
	11 August	Authorization received from CG-102 to stand-up SPO
	12-15 August	Identify users and PAOs. Complete all access forms
	18 August	IT support staff creates e-mail distribution list
	18 Aug – 30 Sep	Prepare/train users in Direct Access
	19 Aug	Identify OPFAC numbers and Department numbers that will be in the new SPO's AOR
	20 Aug	Submit stand-up package to PSC with effective date of 1 Oct
	20 Aug – 20 Sep	Notification to effected units and coordination of transactions between old SPO and new SPO
	14 Sep	Transfer PDRs to new SPO
	15 Sep	PSC transfers/builds new unit files in JUMPS and DA
	15 Sep – 28 Sep	PSC issues JUMPS and Direct Access logons and access levels.
	22 Sep	PSC confirms updates are completed
	30 Sep	PSC updates ALSPO and Contact lists
1 Oct	Stand-up of new SPO	

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ALCOAST 304/03

COMDTNOTE 5000

SUBJ: RETURNING ADMIN SUPPORT TO THE FIELD

1. THE ACQUISITION AND IMPLEMENTATION OF AN AUTOMATED MILITARY PERSONNEL SERVICES AND PAY SYSTEM REQUIRED THE COAST GUARD TO TAKE WORKFORCE SAVINGS (115 YN BILLETS) UPFRONT BETWEEN FY99-02. I RECOGNIZE THAT THIS SOMETIMES PLACED AN ADMINISTRATIVE BURDEN ON THE FIELD BECAUSE PERSONNEL SAVINGS WERE TAKEN BEFORE THE TRUE NATURE OF THE BENEFITS OF AUTOMATION WERE REALIZED OR ACTUALLY KNOWN. I AIM TO CORRECT THESE INBALANCES WHEN AND WHEREVER I CAN.
2. NOW THAT DIRECT ACCESS HAS BEEN FIELDDED, WE HAVE IDENTIFIED SOME YN BILLETS AT THE PERSRUS THAT CAN BE MORE EFFECTIVELY UTILIZED BY OPERATIONAL UNITS. HQ HAS WORKED WITH BOTH MLC COMMANDERS TO IDENTIFY THOSE OPERATIONAL UNIT WHERE ADDITIONAL ADMINISTRATIVE SUPPORT CAN HAVE MAXIMUM IMPACT ON REDUCING THE ADMIN BURDEN IN THE FIELD. I INTEND TO USE A PHASED APPROACH IN DOING THIS. THE FIRST PHASE WILL OCCUR THIS ASSIGNMENT SEASON AND INVOLVES MOVING 35 YN BILLETS BACK TO OPERATIONAL UNITS. THE SECOND AND LIKELY FINAL PHASE WILL OCCUR NEXT ASSIGNMENT SEASON AND LIKELY INVOLVE BETWEEN 30-35 ADDITIONAL BILLETS.
3. QUESTIONS CONCERNING THE CONTENTS OF THIS ALCOAST MAY BE ADDRESED TO YNCM KEN WEIR AT 202-267-2977.
4. INTERNET RELEASE AUTHORIZED.
5. ADM T. H. COLLINS, COMMANDANT, SENDS.

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