

ALSPO G/15 (<https://www.uscg.mil/ppc/alspo/2016/DAuserrolesALLSPOG16.pdf>) announced that DA user role management in DA would be expanded. Several "Functional Roles" have been added to DA, see next page. These functional roles will give you all the roles required to perform in that position. These users no longer need to ask for specific roles. Specific roles required for these "Functional Roles" are handled by PPC.

Functional roles are approved based on the position you are filling. For example, if you are a SPO Auditor, you would request CG SPO Auditor. When PPC receives your request, we verify that you are in a SPO Auditor position and ensure any other criteria is met, and if met, approves the request. If you are not in that position, or the PAL lists your position incorrectly, your request will be denied. For example, you are a SPO Auditor but the PAL lists you as an Admin Yeoman. All positions are verified through the PAL. Do not select multiple functional roles that are related, for example, do NOT select CG SPO Technician and CG SPO Auditor.

When requests are submitted, be sure to remove existing roles on the "Current Roles" section. Remember, the specific roles are imbedded in the "Functional Role". If you have "Current Functions" that are no longer needed, remove those as well.

In order to approve roles at the unit level WITHIN DA, you must have "By direction" authority specifically authorizing this authority. WHEN we get audited requesting if the approver was authorized to approve roles, we will direct the auditors to your unit and your unit will need to supply the "By direction" memo. The paper-based method specifies that only certain individuals are authorized to sign the form. For the DA submitted requests, we are leaving it up to the CO/OIC to determine who at the unit can approve roles at the unit level.

If a user needs a role that is not listed on attached list, they will need to submit the paper-based form.

## DA Functional Roles

### CG Admin Supervisor

YNC and above who are supervisors of Admin (P&A) shops and Personnel Officers

### CG Admin Technician

YNs in Admin (P&A) Offices

### CG CGIS Investigator

Must be approved by CGIS: Mission Support Division Personnel Officer, P&A Division Chief, or Command Security Officer

### CG CO/OIC, XO/XPO, Gold & Silver Badge MC

### CG Educational Services Officer

Requires Designation Memo be submitted via trouble ticket

### CG Enlisted Evaluation Manager

E6 and above that submits/approves EERs on subordinates

### CG Legal Yeoman

### CG PPC DA Helpdesk

### CG Passport Acceptance Agent

Requires designation memo be submitted via trouble ticket and meet training requirements

### CG Recruiter

Must be approved by CG Recruiting Command P&A Branch Chief

### CG Recruiter in Charge

Must be approved by CG Recruiting Command P&A Branch Chief

### CG Reserve Manager

Any member that submits/approves IDT or reserve orders

### CG Reserve Order Funding Approver

CG-1312, DOL-1, PAC-13, and DXRs

### CG SPO Auditor

YNIs and above in a SPO and meet training requirements

### CG SPO Auditor (CG Academy)

YNIs and above at the CG Academy SPO and meet training requirements

### CG SPO Technician

YNs in a SPO

### CG SPO Technician (CG Academy)

YNs at the CG Academy SPO

### CG Training Officer

Requires designation memo be submitted via trouble ticket.

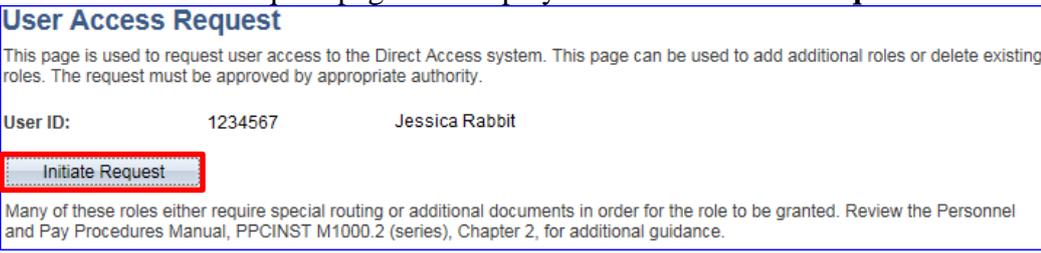
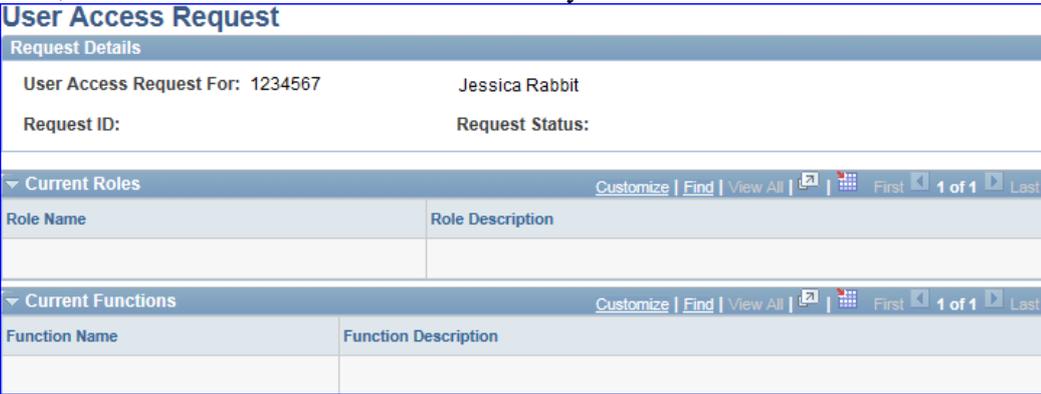
### CG Urinalysis Coordinator

Requires designation memo be submitted via trouble ticket.

# Requesting New User Roles

**Introduction** This guide provides the procedures for requesting new user roles in Direct Access. Please allow 24 hours after PPC approval to see the updated roles in DA.

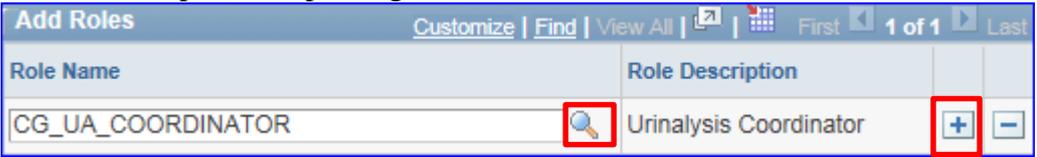
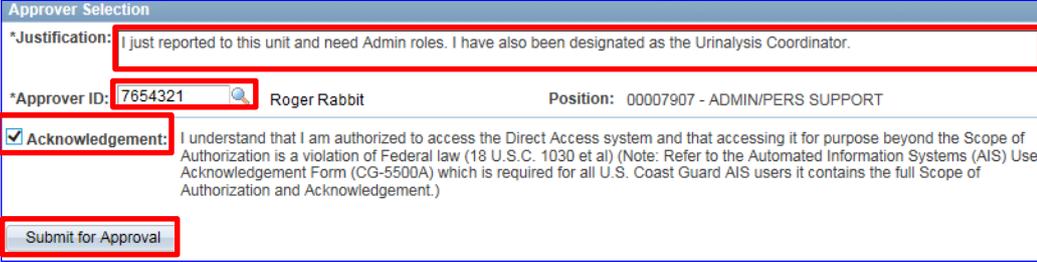
**Procedures** See below.

Step	Action
1	<p>From the Requests tab, click the <b>User Access Request</b> link in the Self Service Requests pagelet.</p> 
2	<p>The User Access Request page will display. Click the <b>Initiate Request</b> button.</p> 
3	<p>The member's current roles and functions (if any) will display. When members PCS, their roles are reset to Self Service only.</p> 

*Continued on next page*

## Requesting New User Roles, Continued

Procedures,  
continued

Step	Action												
4	<p>Select the Functions that the position requires.</p>  <p><b>Add Functions</b> <span>Customize   Find   View 3   First 1-5 of 5 Last</span></p> <table border="1"> <thead> <tr> <th>Add Function</th> <th>Function Name</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>CG Admin Technician</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG CGIS Investigator</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG SPO Auditor</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG SPO Technician</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Training Officer</td> </tr> </tbody> </table>	Add Function	Function Name	<input checked="" type="checkbox"/>	CG Admin Technician	<input type="checkbox"/>	CG CGIS Investigator	<input type="checkbox"/>	CG SPO Auditor	<input type="checkbox"/>	CG SPO Technician	<input type="checkbox"/>	CG Training Officer
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<input type="checkbox"/>	CG SPO Auditor												
<input type="checkbox"/>	CG SPO Technician												
<input type="checkbox"/>	CG Training Officer												
5	<p>Use the lookup and the plus sign to add additional roles.</p>  <p><b>Add Roles</b> <span>Customize   Find   View All   First 1 of 1 Last</span></p> <table border="1"> <thead> <tr> <th>Role Name</th> <th>Role Description</th> </tr> </thead> <tbody> <tr> <td>CG_UA_COORDINATOR</td> <td>Urinalysis Coordinator</td> </tr> </tbody> </table>	Role Name	Role Description	CG_UA_COORDINATOR	Urinalysis Coordinator								
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CG_UA_COORDINATOR	Urinalysis Coordinator												
6	<p>Once all functions and roles have been added, enter the <b>Justification</b> for the request, enter the <b>Approver's Emplid</b> or use the lookup to select it, check the <b>Acknowledgement</b> box and then hit <b>Submit for Approval</b>.</p>  <p><b>Approver Selection</b></p> <p>*Justification: I just reported to this unit and need Admin roles. I have also been designated as the Urinalysis Coordinator.</p> <p>*Approver ID: 7654321 Roger Rabbit Position: 00007907 - ADMIN/PERS SUPPORT</p> <p><input checked="" type="checkbox"/> <b>Acknowledgement:</b> I understand that I am authorized to access the Direct Access system and that accessing it for purpose 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.)</p> <p>Submit for Approval</p>												

*Continued on next page*

## Requesting New User Roles, Continued

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Procedures,  
continued

Step	Action
7	<p>Once submitted, a notification email will be sent to the approver.</p> <div data-bbox="328 524 1193 860" style="border: 1px solid blue; padding: 5px;"><p>From: <a href="mailto:DoNotReply@direct-access.us">DoNotReply@direct-access.us</a> Sent: Tuesday, June 07, 2016 12:48 PM To: Rabbit, Roger Subject: [Non-DoD Source] User Access Request - Waiting Approval</p><p>User access request has been waiting for your approval.</p><p>Requested For : Jessica Rabbit Request ID : 0000032</p></div> <p>Once they approve it, the request is forwarded to PPC for final approval.</p>
8	<p>Upon final approval, this email notification will be sent to the requester:</p> <div data-bbox="328 972 1104 1317" style="border: 1px solid blue; padding: 5px;"><p>From: <a href="mailto:DoNotReply@direct-access.us">DoNotReply@direct-access.us</a> Sent: Tuesday, June 07, 2016 9:55 AM To: Rabbit, Jessica Subject: [Non-DoD Source] User Access Request - Approved</p><p>Your user access request has been approved.</p><p>Requested For : Jessica Rabbit Request ID : 0000025</p></div>
9	<p>If the request is denied by either the first approver or PPC, this email notification will be sent to the requester:</p> <div data-bbox="328 1429 1066 1774" style="border: 1px solid blue; padding: 5px;"><p>From: <a href="mailto:DoNotReply@direct-access.us">DoNotReply@direct-access.us</a> Sent: Tuesday, June 07, 2016 11:06 AM To: Rabbit, Jessica Subject: [Non-DoD Source] User Access Request - Denied</p><p>Your user access request has been denied.</p><p>Requested For : Jessica Rabbit Request ID : 0000029</p></div>

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