

U.S. Coast Guard and U.S. Public Health Service



Commissioned Corps Force Management (CCFM) Integration – Business Procedure Document – Promotion Boards

**Version 1.2
September 11, 2015**

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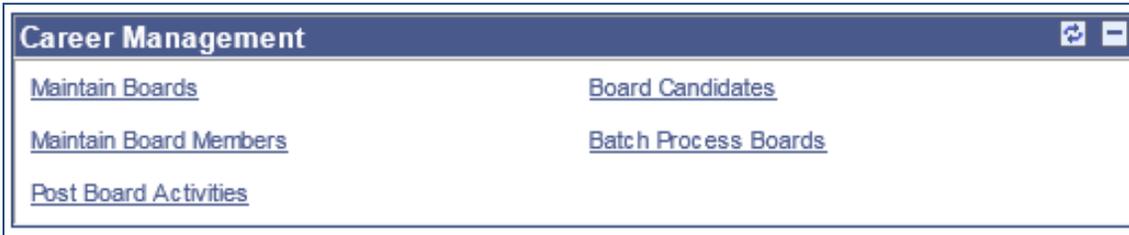
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1 INTRODUCTION

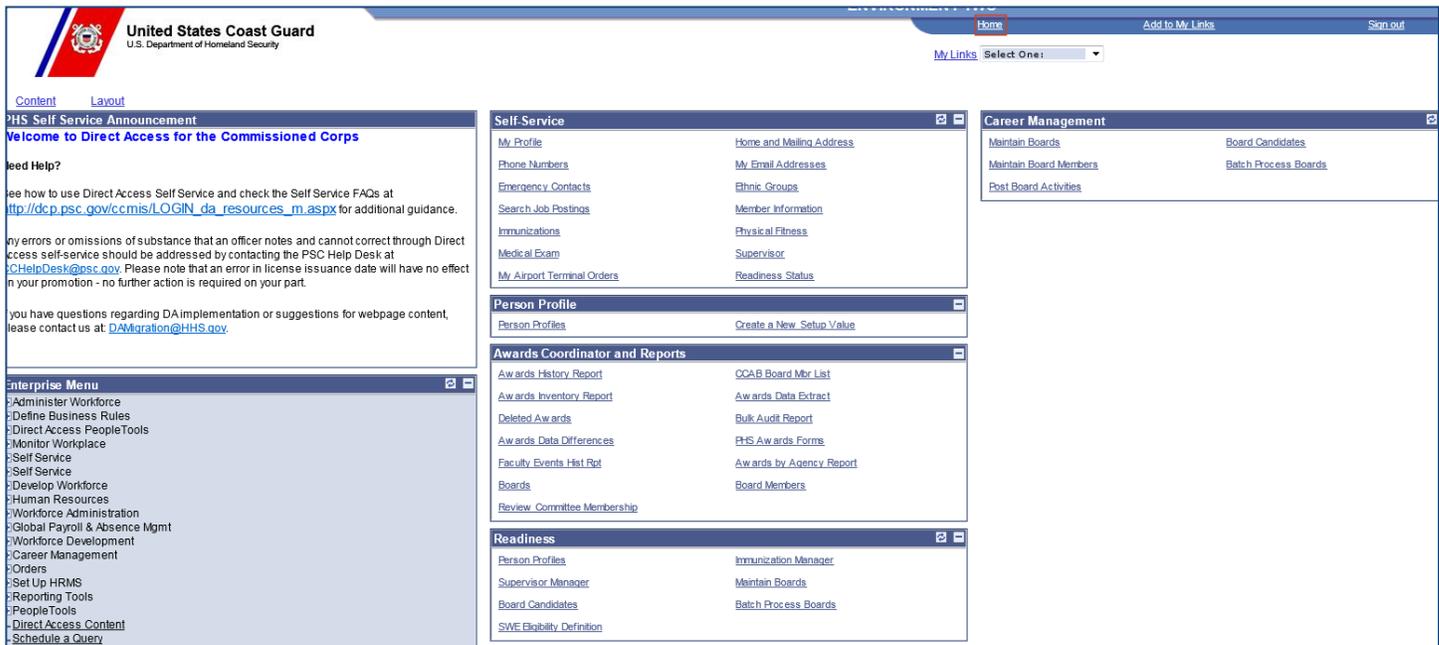
This document is a user guide for the implementation of PHS Promotion Boards in Direct Access 9.1. This guide provides the procedures for creating promotion boards, applying promotion eligibility rules, managing board candidates, and selecting candidates for promotion via the Career Management Boards functionality.

2 PORTAL NAVIGATION

The user can navigate to the component they need to access via the Career Management portal pagelet below.



To return to the home screen at any time, the user can click the [Home](#) link in the upper right-hand corner of the window.



3 WILDCARD SEARCH

Direct Access supports the use of three wildcard features when searching for data. The wildcards can be helpful in finding the exact information that user wants to process. The following are the supported standard wildcard features.

Character	Function
_ (underscore)	Match any single character.
\ (back slash)	Escape character – don't treat the next character as a wildcard.
% (percent sign)	Match one or more characters.

The “wildcard” search feature may be used when searching for a member. One commonly used wildcard is “_”. This sign represents a single letter instead of a group of letters. To see all of the members whose last names contain the letters “C”, “H” and “N”, in that particular order, the “_” wildcard would be used to represent a single letter between the characters in which it is placed.

The screenshot shows a search interface with the following search criteria:

- Maximum number of rows to return (up to 300): 300
- Empl ID: begins with
- Profile Type: begins with
- Name: begins with
- Last Name: begins with CH_N
- Alternate Character Name: begins with
- Include History: Correct History: Case Sensitive:

Buttons: Search, Clear, Basic Search, Save Search Criteria

Search Results
Only the first 300 results of a possible 489 can be displayed. Enter more search key information and search again to re

Empl ID	Profile Type	Name	Last Name	Alternate Character Name
	AWARDS COORD		CHANDLER	(blank)
	PERSON		CHANDLER	(blank)
	PERSON		CHANDRASENA	(blank)
	PERSON		CHANES	(blank)
	PERSON		CHANEY	(blank)
	RETIREE		CHANEY	(blank)
	PERSON		CHANEY	(blank)
	RETIREE		CHANEY	(blank)
	PERSON		CHANEY	(blank)
	PERSON		CHANEY	(blank)
	RETIREE		CHANEY	(blank)
	PERSON		CHANEY	(blank)

Another wildcard that is commonly used is the “%” sign. This wildcard is used to represent multiple characters. For example, to search for members whose last names contain the letters “C”, “H” and “N”, in that particular order the “%” wildcard should be used.

The screenshot shows a search interface with the following search criteria:

- Maximum number of rows to return (up to 300): 300
- Empl ID: begins with
- Profile Type: begins with
- Name: begins with
- Last Name: begins with CH%N
- Alternate Character Name: begins with
- Include History: Correct History: Case Sensitive:

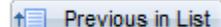
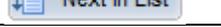
Buttons: Search, Clear, Basic Search, Save Search Criteria

Search Results
Only the first 300 results of a possible 1459 can be displayed. Enter more search key information and sea

Empl ID	Profile Type	Name	Last Name	Alternate Character Name
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	RETIREE		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHACON	(blank)
	AWARDS COORD		CHACON	(blank)
	PERSON		CHACON	(blank)
	PERSON		CHADBAND	(blank)
	PERSON		CHADBOURNE	(blank)

4 FUNCTIONALITY

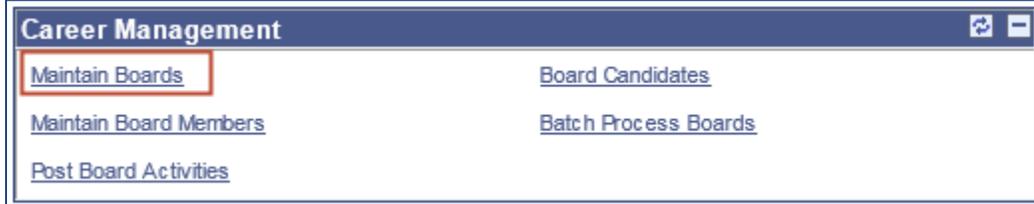
The table below provides a list of icons and their functionality to assist with navigation throughout the different pages.

Field	Description/Instructions
*	This symbol represents a required field.
	Click on this icon to generate a list of values.
	Click on this icon to add a row.
	Click on this icon to remove a row.
	This icon will allow user to customize the grid.
	This icon will allow user to search the grid.
	This icon will show all of the search results on one page.
	This icon will display the grid in a separate window.
	This icon will allow user to download the grid to an Excel spreadsheet.
	This icon will navigate to the previous set of grid rows.
	This icon will navigate to the next set of grid rows.
	This icon will navigate to the first page of the grid rows.
	This icon will navigate to the last page of the grid rows.
	This icon performs spell check.
	This icon will navigate to the previous item in the list of the search results.
	This icon will navigate to the next item in the list of the search results.
	This icon will return to the search results page.
	This icon displays the current page in a modal window.
	The Home link will return the user to the Portal homepage.

5 CREATE A NEW PROMOTION BOARD

Authorized users will have access to create PHS promotion boards in Direct Access via the Maintain Boards and Batch Process Boards components. This section will guide you through the process of creating a new PHS promotion board in Direct Access, populating the boards with candidates, and running eligibility on board candidates.

Portal Link: Career Management > Maintain Boards



Enterprise Menu path: Career Management > Maintain Boards

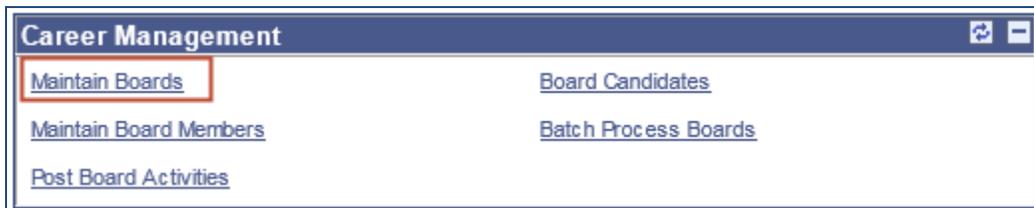
Note: You can also save Maintain Boards as a favorite within Direct Access. To do this navigate to the page, click on the drop down field under My Links, and select "Add to My Links":



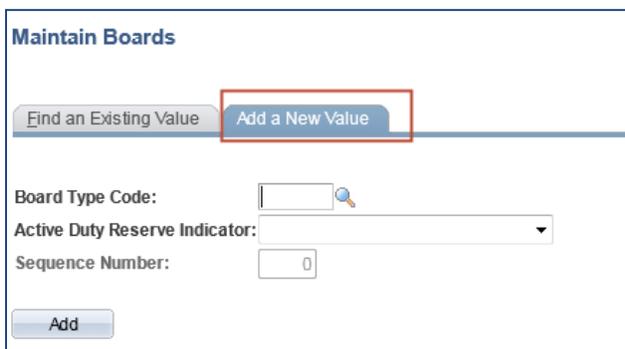
The My Links feature is available for use on any link within Direct Access.

5.1 Create a New PHS Board via Maintain Boards

1. Click the [Maintain Boards](#) link in the Career Management portal pagelet.



2. Click Add New Value.



Board Type	Business Unit	Membership	Group ID	Candidate Job Code	Promo Job Code
PHSMED	OFFPH	PHSMED	PHSPROMO_TG	010098	010097
PHSDEN	OFFPH	PHSDENT	PHSPROMO_TG	020098	020097
PHSNUR	OFFPH	PHSNURS	PHSPROMO_TG	030098	030097
PHSENG	OFFPH	PHSENG	PHSPROMO_TG	040098	040097
PHSSCI	OFFPH	PHSSCI	PHSPROMO_TG	050298	050297
PHSEHO	OFFPH	PHSEHO	PHSPROMO_TG	060098	060097
PHSVET	OFFPH	PHSVET	PHSPROMO_TG	070098	070097
PHSPHA	OFFPH	PHSPHARM	PHSPROMO_TG	080098	080097
PHSDIE	OFFPH	PHSDIET	PHSPROMO_TG	090098	090097
PHSTHE	OFFPH	PHSTHER	PHSPROMO_TG	0T0198	0T0197
PHSHSO	OFFPH	PHSHSO	PHSPROMO_TG	0H1098	0H1097
PHSO2P	OFFCG	N/A	PHSPG_O2	000098	000097
PHSO3P	OFFCG	N/A	PHSPG_O3	000097	000096
PHSO4P	OFFCG	N/A	PHSPG_O4	000096	000095
PHSO5N	OFFCG	N/A	PHSPG_O5N	000095	000094
PHSO5R	OFFCG	N/A	PHSPG_O5R	000095	000094
PHSO6P	OFFCG	N/A	PHSPG_O6	000094	000093
PHSEPP	OFFPH	N/A	PHSPROMO_EP	020098	020097

3. Enter the Board Type Code.
4. Enter “Active Duty” for Active Duty Reserve Indicator.
5. Click Add.
6. Enter the Board Setup Values.

Field	Description/Instructions
*Convene Date	Start Date of Board (3/1 of the promotion year)
*Status	Pre-Board
*Imaging Profile	PROMO
Membership	See Table Above
Business Unit	See Table Above
Group ID	See Table Above
Candidate Job Code	See Table Above
Promo Job Code	See Table Above

***IMPORTANT:** It is very important that these fields are filled in as instructed so that the board will populate with the correct candidates for the specified board type.

The screenshot shows the 'Maintain Boards' application interface. At the top, there are two tabs: 'Maintain Boards' and 'Maintain Panels'. Below the tabs, the 'Brd Type' is set to 'PHSDEN PHS Dental Promo Board', 'AD/Res Ind' is 'Active', and 'Sequence' is '3'. The 'Board Setup' section includes fields for 'Convene Dt' (03/01/2016), 'Status' (Pre-Brd), '*Imaging Profile' (PROMO), '*Security Type' (PHS Promo), and a checkbox for 'Best Qual Board'. The 'Candidates' section includes fields for 'Business Unit' (OFFPH), '*Group ID' (PHSPROMO), '*Cand Job Code' (020098), 'Promo Job Code' (020097), 'Start Sig#', 'Zone Size/Cut', and 'War/E2JG Dor'. There are buttons for 'Pop Brd Cand', 'Compute Final Multiple', and 'Delete Board'.

7. Click Save once all board setup values have been entered. **Be sure to note the Board Type, Sequence, and Convene Date as you will use these throughout the board process to manage board candidates and manage board members.**

5.2 Create a New PHS Board via Batch Process Boards

1. Click the [Batch Process Boards](#) link in the Career Management portal pagelet.

The screenshot shows the 'Career Management' portal pagelet. It contains several links: 'Maintain Boards', 'Maintain Board Members', 'Post Board Activities', 'Board Candidates', and 'Batch Process Boards'. The 'Batch Process Boards' link is highlighted with a red box.

2. Click Add New Value.

The screenshot shows the 'Batch Process Boards' page. It has two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red box. Below the buttons is a text input field labeled 'Run Control ID:' and an 'Add' button.

3. Enter a Run Control ID and click Add.

Note: It is suggested that you use an identifiable name for the process that you are running. Ex. CREATEBRDS16 (Create Boards for 2016 Promotion Year).

4. Enter the Batch Process Boards prompt values.

Field	Description/Instructions
Board Type Code	N/A
*Board Security	PHS Promo
*Start Date	Enter the Convene Date of the new board
*Batch Run Type	0 – Create Boards
Baseline Start Date	Enter the Convene Date of the boards you want to copy from

5. Click Save and Run.

Batch Process

Run Control ID: CREATEBRDS16 [Report Manager](#) [Process Monitor](#)

Board Type Code: **** Enter Board name to run Eligibility for a Single Board.
(Valid only when Applying Eligibility)**

*Board Security: PHS Promc

*Start Date: 03/01/2016

*Batch Run Type: 0 - Create Boards

Baseline Start Date: 03/01/2015

6. Change the Server Name to PSUNX and click OK.

Process Scheduler Request

User ID: Run Control ID: CREATEBRDS16

Server Name: PSUNX Run Date: 08/07/2015

Recurrence: Run Time: 9:38:35AM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Batch Process Boards	CG_EL_BATCH	Application Engine	Web	TXT	Distribution

- Click the Process Monitor link and Refresh. Once the Run Status is “Success” and Distribution Status is “Posted” the new boards have been created and can be viewed via [Maintain Boards](#).

Batch Process

Run Control ID: CREATEBRDS16 [Report Manager](#) [Process Monitor](#)

Process Instance: 268100

Board Type Code: **** Enter Board name to run Eligibility for a Single Board. (Valid only when Applying Eligibility)**

*Board Security: PHS Promc ▼

*Start Date: 03/01/2016 📅

*Batch Run Type: 0 - Create Boards ▼

Baseline Start Date: 03/01/2015 📅

Process List [Server List](#)

View Process Request For

User ID: AOLIVER 🔍 Type: ▼ Last ▼ 90 Days ▼

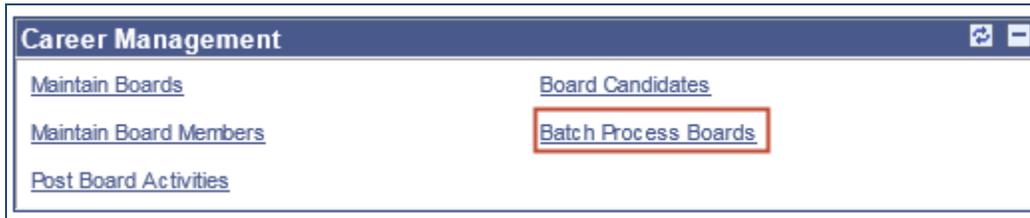
Server: ▼ Name: 🔍 Instance: to

Run Status: ▼ Distribution Status: ▼ Save On Refresh

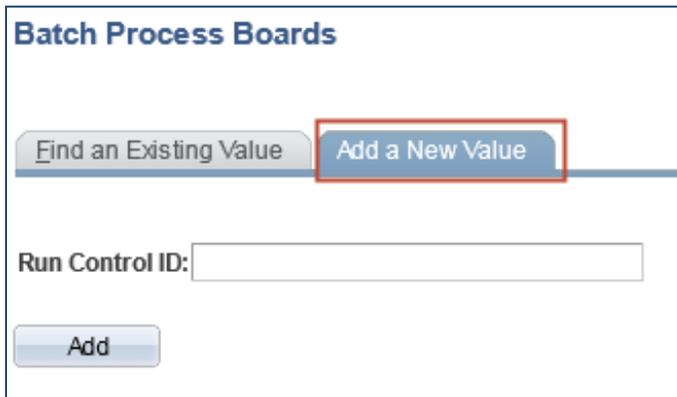
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	268100		Application Engine	CG_EL_BATCH	AOLIVER	08/07/2015 9:38:35AM PDT	Success	Posted	Details

5.3 Populate Boards with Candidates

1. Click the [Batch Process Boards](#) link in the Career Management portal pagelet.



2. Click Add New Value.



3. Enter a Run Control ID and click Add.
Note: It is suggested that you use an identifiable name for the process that you are running. Ex. POPBRDS16 (Populate Boards for 2016 Promotion Year)
4. Enter the Batch Process Boards prompt values.

Field	Description/Instructions
Board Type Code	N/A
*Board Security	PHS Promo
*Start Date	Enter the Convene Date of the boards you are populating with candidates
*Batch Run Type	1 – Populate Boards
Baseline Start Date	N/A

5. Click Save and Run.

Batch Process

Run Control ID: POPBRDS16 [Report Manager](#) [Process Monitor](#)

Board Type Code: **** Enter Board name to run Eligibility for a Single Board. (Valid only when Applying Eligibility)**

*Board Security: PHS Promc

*Start Date: 03/01/2016

*Batch Run Type: 1 - Populate Boards

Baseline Start Date:

6. Change the Server Name to PSUNX and click OK.

Process Scheduler Request

User ID: Run Control ID: CREATEBRDS16

Server Name: PSUNX Run Date: 08/07/2015

Recurrence: Run Time: 9:38:35AM

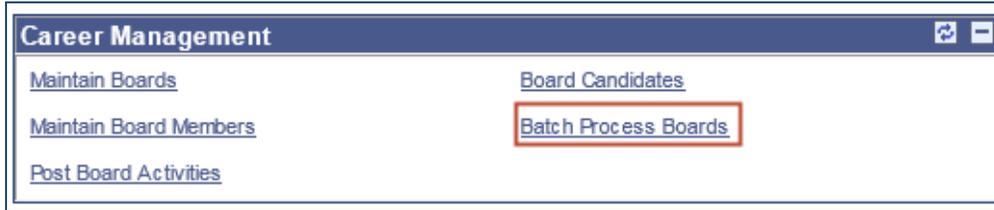
Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Batch Process Boards	CG_EL_BATCH	Application Engine	Web	TXT	Distribution

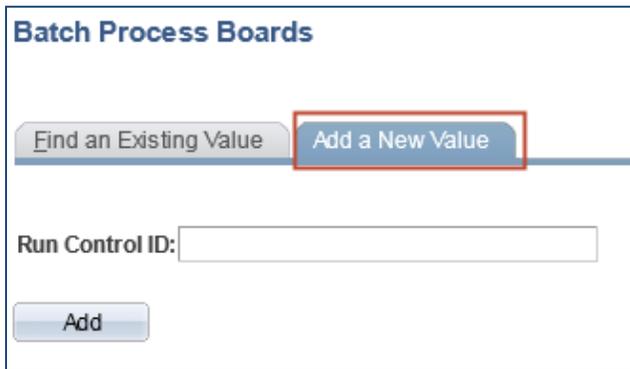
7. Click the Process Monitor link and Refresh. Once the Run Status is “Success” and Distribution Status is “Posted” the boards have been populated and can be viewed via Board Candidates. **Board Candidate status values will now be displayed as “Undecided”.**

5.4 Apply Eligibility to Board Candidates

1. Click the [Batch Process Boards](#) link in the Career Management portal pagelet.



2. Click Add New Value.



3. Enter a Run Control ID and click Add.
Note: It is suggested that you use an identifiable name for the process that you are running. Ex. APPELIG16 (Apply Eligibility for 2016 Promotion Year)
4. Enter the Batch Process Boards prompt values.

Field	Description/Instructions
Board Type Code	N/A
*Board Security	PHS Promo
*Start Date	Enter the Convene Date of the boards you are applying eligibility for
*Batch Run Type	2 – Apply Eligibility
Baseline Start Date	N/A

5. Click Save and Run.

Batch Process

Run Control ID: APPELIG16 [Report Manager](#) [Process Monitor](#) Run

Board Type Code: ** Enter Board name to run Eligibility for a Single Board.
(Valid only when Applying Eligibility)

*Board Security: PHS Promc ▼

*Start Date: 03/01/2016

*Batch Run Type: 2 - Apply Eligibility ▼

Baseline Start Date:

Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display

6. Change the Server Name to PSUNX and click OK.

Process Scheduler Request

User ID: Run Control ID: CREATEBRDS16

Server Name: PSUNX ▼ Run Date: 08/07/2015

Recurrence: Run Time: 9:38:35AM Reset to Current Date/Time

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Batch Process Boards	CG_EL_BATCH	Application Engine	Web ▼	TXT ▼	Distribution

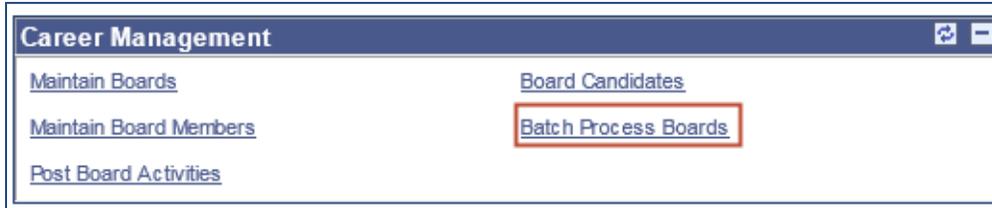
OK
Cancel

7. Click the Process Monitor link and Refresh. Once the Run Status is “Success” and Distribution Status is “Posted” eligibility has been applied to the boards and can be viewed via Board Candidates. **Board Candidates status will now display as “Eligible” or “Not Eligible”.**

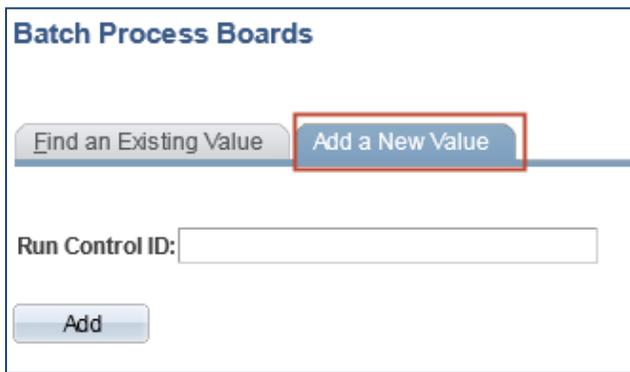
5.5 Apply Eligibility to One Board

Users have the ability to rerun eligibility for one board via the Batch Process component. Follow the steps below of process eligibility for one board.

1. Click the [Batch Process Boards](#) link in the Career Management portal pagelet.



2. Click Add New Value.



3. Enter a Run Control ID and click Add.
Note: It is suggested that you use an identifiable name for the process that you are running. Ex. PHSDEN16 (Apply Eligibility for 2016 PHS Dental Board)
4. Enter the Batch Process Boards prompt values.

Field	Description/Instructions
Board Type Code	Enter the Board Type Code for single board you are processing eligibility for
*Board Security	PHS Promo
*Start Date	Enter the Convene Date of the board you are applying eligibility for
*Batch Run Type	2 – Apply Eligibility
Baseline Start Date	N/A

5. Click Save and Run.

Batch Process

Run Control ID: PHSENGE15 [Report Manager](#) [Process Monitor](#)

Board Type Code: PHSENG **** Enter Board name to run Eligibility for a Single Board.
(Valid only when Applying Eligibility)**

*Board Security: PHS Promc

*Start Date: 03/01/2015

*Batch Run Type: 2 - Apply Eligibility

Baseline Start Date:

6. Change the Server Name to PSUNX and click OK.

Process Scheduler Request

User ID: Run Control ID: CREATEBRDS16

Server Name: PSUNX Run Date: 08/07/2015

Recurrence: Run Time: 9:38:35AM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Batch Process Boards	CG_EL_BATCH	Application Engine	Web	TXT	Distribution

7. Click the Process Monitor link and Refresh. Once the Run Status is “Success” and Distribution Status is “Posted” eligibility has been applied to the board and can be viewed via Board Candidates. **Board Candidates status will now display as “Eligible” or “Not Eligible”.**

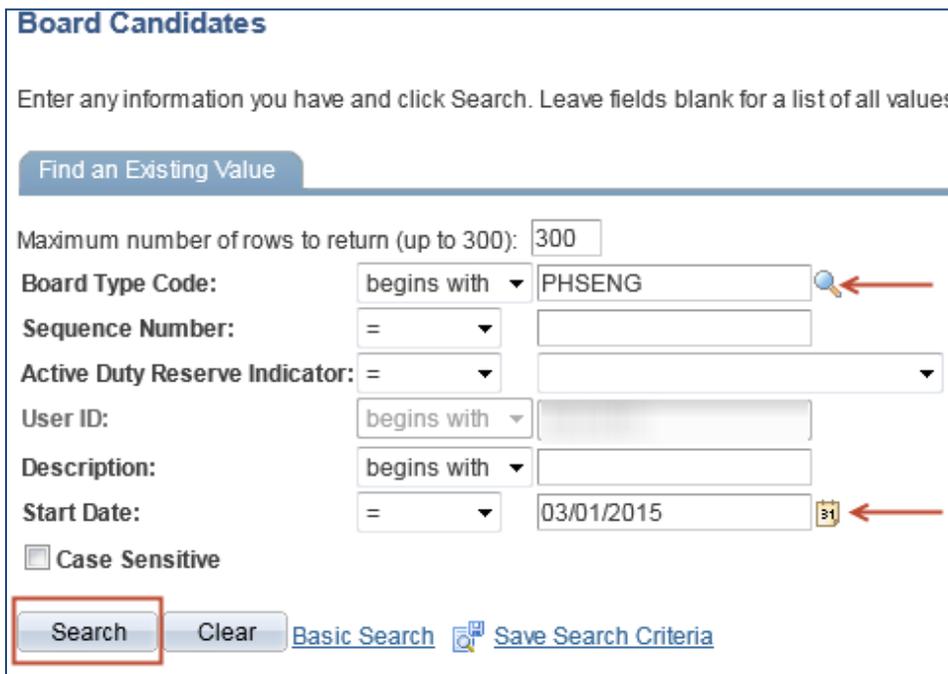
5.6 Apply Eligibility to One Board Candidate

Users have the ability to rerun eligibility for one candidate via the Board Candidates component. This may be necessary when data for an officer has changed which may impact their eligibility results. Follow the steps below to run eligibility for one officer.

1. Click the [Board Candidates](#) link in the Career Management portal pagelet.



2. Enter the Board Type Code and the Start Date of the board. Click Search.

A screenshot of the "Board Candidates" search form. The form has a title "Board Candidates" and a subtitle "Enter any information you have and click Search. Leave fields blank for a list of all values". Below the subtitle is a button labeled "Find an Existing Value". The form contains several search criteria: "Maximum number of rows to return (up to 300):" with a text input field containing "300"; "Board Type Code:" with a dropdown menu set to "begins with" and a text input field containing "PHSENG"; "Sequence Number:" with a dropdown menu set to "=" and an empty text input field; "Active Duty Reserve Indicator:" with a dropdown menu set to "=" and an empty dropdown menu; "User ID:" with a dropdown menu set to "begins with" and an empty text input field; "Description:" with a dropdown menu set to "begins with" and an empty text input field; "Start Date:" with a dropdown menu set to "=" and a date input field containing "03/01/2015". There is a "Case Sensitive" checkbox which is unchecked. At the bottom of the form are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". The "Search" button is highlighted with a red rectangular box. There are also red arrows pointing to the search icon in the "Board Type Code" field and the calendar icon in the "Start Date" field.

3. All candidates will display on the appropriate board.

Temp Grade Board Candidates: All category specific boards (i.e. PHSDEN, PHSNUR, and PHSMED) will contain O1-O5 temp grade officers in the specified board category.

Perm Grade Board Candidates: All grade specific boards (i.e. PHSO2P, PHSO3P, and PHSO5R) will contain O1-O5 perm grade officers that may be eligible for specified grade of the board, regardless of their category.

EPP Board Candidates: All O1-O5 temp grade officers will display on the EPP board.

Board Candidate

Board Type: PHSENG PHS Engineer Promo Board Elig Inelig to Elig

AD/Res Ind: Active Status: In-Session Seq: 2 Cut/Sig#: Del Below Zone

Board/Panel Candidates Customize Find View 100 First 1-50 of 283 Last

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term
1	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	02/24/2026
2	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	12/07/2026
3	In	0	CDR	CDR		Waivers	Eligible	07/01/2015	02/02/2018
4	In	0	CDR	CDR		Waivers	Eligible	07/01/2015	02/03/2032
5	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	01/07/2031
6	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	10/12/2022
7	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	06/24/2025

4. Candidates will appear on the board according to the ‘Cand Status’ values below.

Cand Status Value	Description
Above Cut	Above Cut – Manually set by user
Decile	Lowest Decile – Manually set by user
Defer	Promotion Deferred – Manually set by user
Eligible	Eligible for promotion – Automatically set when eligibility is run
EPP	EPP eligible added to temp grade board – Manually set by user
Not Eligible	Not Eligible for promotion – Automatically set when eligibility is run
Not Selected	Not Selected for promotion – Manually set by user
Not Selected Below	Selected Below the line – Manually set by user
Selected	Selected for promotion – Manually set by user
Quartile	Lowest Quartile – Manually set by user
Undecided	Eligibility has not been run on the board OR Candidate has bad job data that prevents the eligibility program from processing eligibility – Automatically set when boards are popped or eligibility is run. NOTE: An “Undecided” status after eligibility is run indicates that there is bad data in the system for the officer which prevented the eligibility program for running.

5. Use the ‘Find’ link in the top right corner of the Board Candidates grid to search for an officer.

Board Candidate

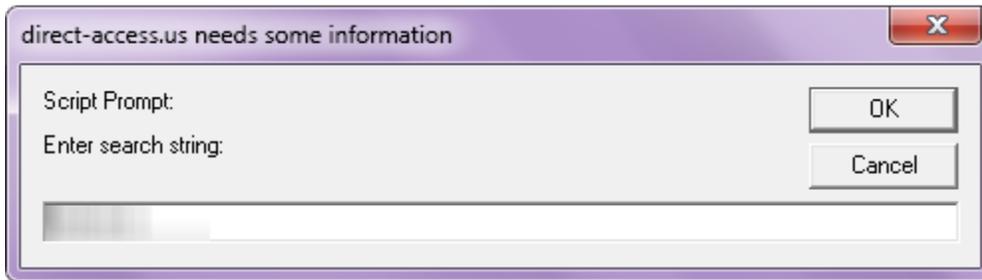
Board Type: PHSENG PHS Engineer Promo Board Elig Inelig to Elig

AD/Res Ind: Active Status: Adjourned Seq: 2 Cut/Sig#: Del Below Zone

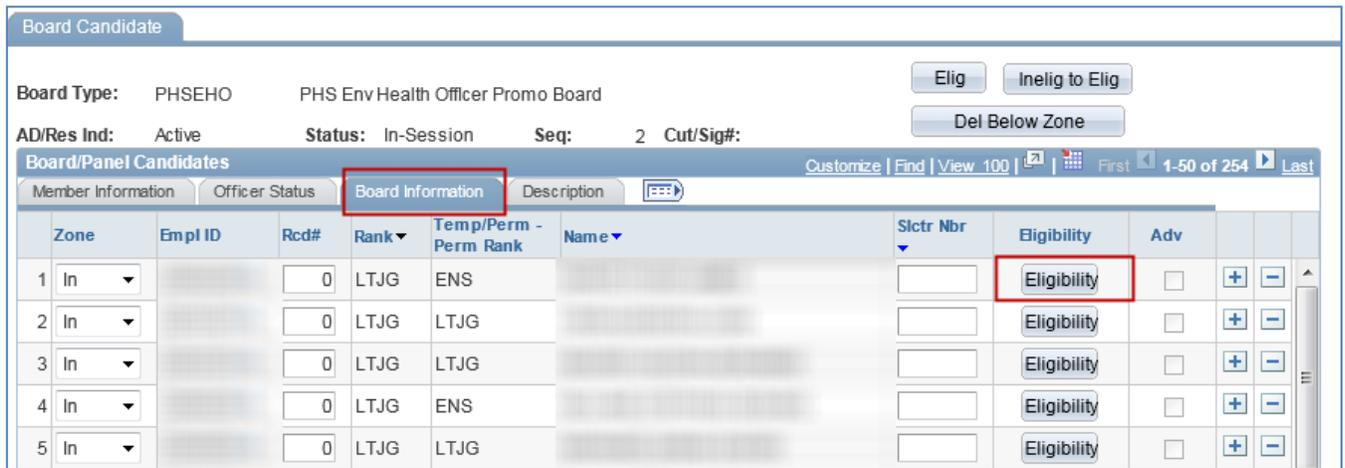
Board/Panel Candidates Customize Find View 100 First 1-50 of 283 Last

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Eligibility	Cand Status	Received Dt	Submitted	Exp AD Term
1	In	0	LTJG	ENS		Eligibility	Not Elig	07/09/2015	09/28/2042	
2	In	0	LTJG	ENS		Eligibility	Not Elig	07/09/2015	08/25/2042	
3	In	0	LTJG	LTJG		Eligibility	Eligible	07/01/2015	07/05/2040	
4	In	0	LTJG	ENS		Eligibility	Not Elig	07/09/2015	06/19/2042	

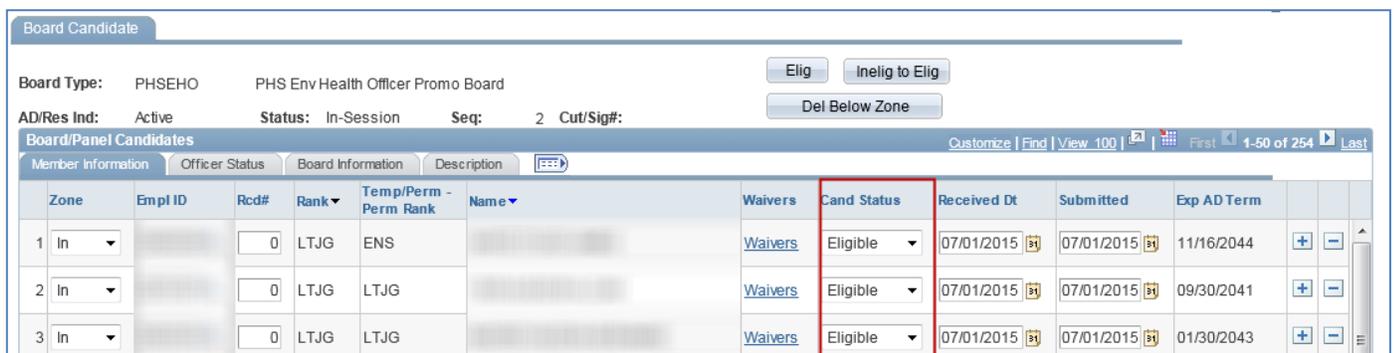
6. Use the Script Prompt to enter the Empl ID of the officer.



7. Click OK.
8. Click the Board Information tab and use the Eligibility button to calculate eligibility.



The system will apply the eligibility rules to the officer's data immediately. If the officer's eligibility has changed, the Cand Status will change accordingly.

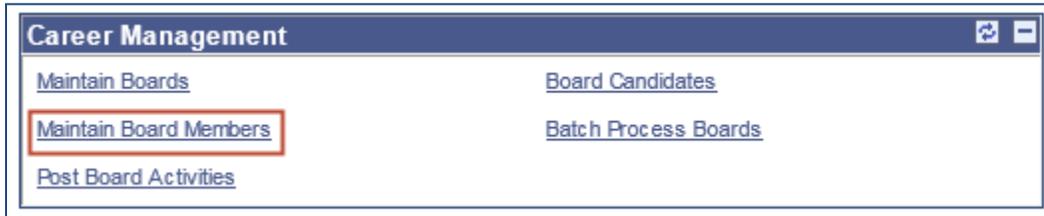


9. Save the Board Candidates page after calculating eligibility.

5.7 Assign Board Members to Boards

Although PHS board members will perform board candidate review and scoring activities outside of Direct Access, board members need to be added to the Maintain Board Members component so that Direct Access can produce a list of eligible board members each promotion year. Follow the steps below to add board members for each PHS temp grade board.

1. Click the [Maintain Board Members](#) link in the Career Management portal pagelet.



2. Enter the Board Type Code, Sequence Number, and Start Date of the board you wish to add members to. Click the Search button.
3. Enter the Board Type Code and the Start Date of the board. Click Search.

Maintain Board Members

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): 300

Board Type Code: begins with PHSENG

Sequence Number: = 2

Active Duty Reserve Indicator: = Active Duty

User ID: begins with

Description: begins with

Start Date: = 03/01/2015

Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

4. Select 'Member' from the Mbr Type field.

Board Members

Brd Type: PHSENG PHS Engineer Promo Board
AD/Res Ind: Active Sequence: 2

Customize | Find | View All | First 1 of 1 Last

	Mbr Type	Empl ID	Rcd #	Name	Rank	OPRID
1	<div style="border: 1px solid black; padding: 2px;"> <ul style="list-style-type: none"> Admin Legal Mbr Med Mbr <li style="background-color: yellow;">Member Other President Presiding Recorder </div>		0			

5. Enter the Empl Id of the board member in the 'Empl ID' field and tab out of the field. The board member's name will appear in the 'Name' field.

Board Members

Brd Type: PHSENG PHS Engineer Promo Board
AD/Res Ind: Active **Sequence:** 2

Customize | Find | View All | First 1 of 1 Last

	Mbr Type	Empl ID	Rcd #	Name	Rank	OPRID		
1	Member		0		CAPT			+ -

6. Use the “+” button to add the next board member to the board.

Board Members

Brd Type: PHSENG PHS Engineer Promo Board
AD/Res Ind: Active **Sequence:** 2

Customize | Find | View All | First 1 of 1 Last

	Mbr Type	Empl ID	Rcd #	Name	Rank	OPRID		
1	Member		0		CAPT			+ -

7. Repeat steps 3-5 to add all board members. Once all board members have been added save the page.

Board Members

Brd Type: PHSENG PHS Engineer Promo Board
AD/Res Ind: Active **Sequence:** 2

Customize | Find | View All | First 1-3 of 3 Last

	Mbr Type	Empl ID	Rcd #	Name	Rank	OPRID		
1	Member		0		CAPT			+ -
2	Member		0		CAPT			+ -
3	Member		0		CAPT			+ -

Save Return to Search Add Update/Display Correct History

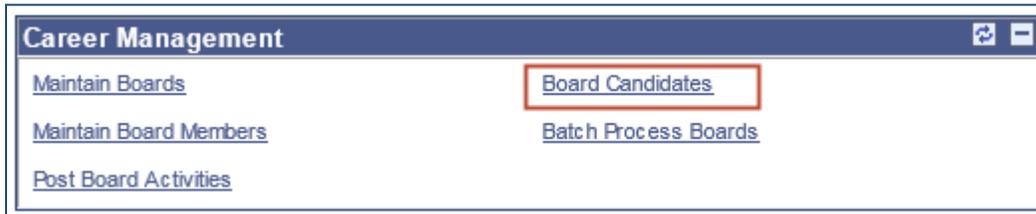
8. Repeat steps 2-6 to add all board members their respective temp grade boards for the promotion year.

6 MANAGE BOARD CANDIDATES

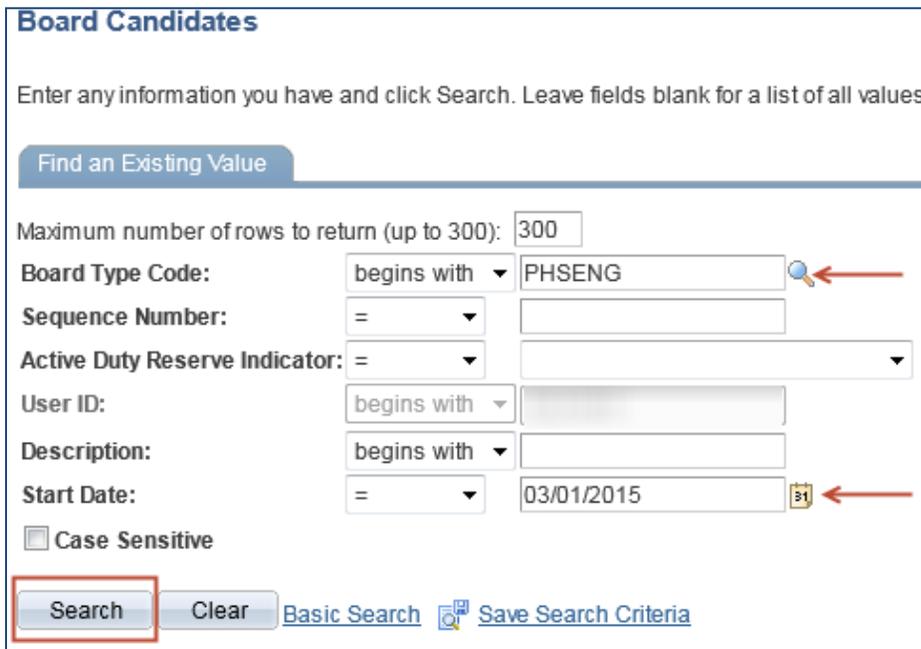
Authorized users will have access to manage candidates via the Board Candidates component. This section of the user guide outlines the steps for adding candidates to a board, deleting candidates from a board, changing board candidate status values.

6.1 Viewing Board Candidates

1. Click the [Board Candidates](#) link in the Career Management portal pagelet.



2. Enter the Board Type Code and the Start Date of the board. Click Search.



The screenshot shows the 'Board Candidates' search form. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values'. Below this is a 'Find an Existing Value' button. The form includes several search criteria: 'Maximum number of rows to return (up to 300): 300', 'Board Type Code: begins with PHSENG', 'Sequence Number: =', 'Active Duty Reserve Indicator: =', 'User ID: begins with', 'Description: begins with', and 'Start Date: = 03/01/2015'. There are red arrows pointing to the search icons in the 'Board Type Code' and 'Start Date' fields. At the bottom, the 'Search' button is highlighted with a red rectangular box. Other buttons include 'Clear', 'Basic Search', and 'Save Search Criteria'.

3. All candidates will display on the appropriate board.

Temp Grade Board Candidates: All category specific boards (i.e. PHSDEN, PHSNUR, and PHSMED) will contain O1-O5 temp grade officers in the specified board category.

Perm Grade Board Candidates: All grade specific boards (i.e. PHSO2P, PHSO3P, and PHSO5R) will contain O1-O5 perm grade officers that may be eligible for specified grade of the board, regardless of their category.

EPP Board Candidates: All O1-O5 temp grade officers will display on the EPP board.

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term
1	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	02/24/2026
2	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	12/07/2026
3	In	0	CDR	CDR		Waivers	Eligible	07/01/2015	02/02/2018
4	In	0	CDR	CDR		Waivers	Eligible	07/01/2015	02/03/2032
5	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	01/07/2031
6	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	10/12/2022
7	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	06/24/2025

4. Candidates will appear on the board according to the ‘Cand Status’ values below.

Cand Status Value	Description
Above Cut	Above Cut – Manually set by user
Decile	Lowest Decile – Manually set by user
Defer	Promotion Deferred – Manually set by user
Eligible	Eligible for promotion – Automatically set when eligibility is run
EPP	EPP eligible added to temp grade board – Manually set by user
Not Eligible	Not Eligible for promotion – Automatically set when eligibility is run
Not Selected	Not Selected for promotion – Manually set by user
Not Selected Below	Selected Below the line – Manually set by user
Selected	Selected for promotion – Manually set by user
Quartile	Lowest Quartile – Manually set by user
Undecided	Eligibility has not been run on the board OR Candidate has bad job data that prevents the eligibility program from processing eligibility – Automatically set when boards are popped or eligibility is run. NOTE: An “Undecided” status after eligibility is run indicates that there is bad data in the system for the officer which prevented the eligibility program from running.

6.2 Managing EPP Candidates List

1. Use the steps in [‘6.1 Viewing Board Candidates’](#) to find and pull up the EPP board candidates list.
2. Click the ‘Download’ icon in the top right hand corner of the Board Candidates grid.

The screenshot shows the 'Board Candidate' interface. At the top, there are buttons for 'Elig', 'Inelig to Elig', and 'Del Below Zone'. Below these are fields for 'Board Type: PHSEPP', 'PHS Exceptional Proficiency Promotions', 'AD/Res Ind: Active', 'Status: In-Session', 'Seq: 2', and 'Cut/Sig#'. The main area is a table titled 'Board/Panel Candidates' with columns: Zone, Empl ID, Rcd#, Rank, Temp/Perm - Perm Rank, Name, Waivers, Cand Status, Received Dt, and Exp AD Term. A red arrow points to a download icon (a grid with a downward arrow) in the top right corner of the table area.

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term
1	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	07/01/2033
2	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	04/12/2027
3	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	11/02/2026
4	In	0	CDR	LT		Waivers	Eligible	07/01/2015	04/29/2032
5	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	08/23/2029
6	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	09/06/2034

3. Click Open or Save to view the downloaded list in an excel format.

If IE indicates your download has been blocked, permit the download by clicking on its Information Bar and selecting "Download File...".

Please close this window after download has completed ...

The screenshot shows a Windows Internet Explorer dialog box titled "What do you want to do with ps.xls?". It provides file details: Size: 858 KB, Type: Microsoft Office Excel 2003, and From: hcenv3.direct-access.us. The dialog offers three options: "Open" (with a note "The file won't be saved automatically."), "Save", and "Save as". A "Cancel" button is at the bottom right.

4. If eligibility has been run, PHSEPP board candidates Cand Status will display as “Eligible” or “Not Eligible”.

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term
In		0	CDR	LCDR		Waivers	Eligible	7/1/2016	6/2/2037
In		0	CDR	LT		Waivers	Eligible	7/1/2016	6/28/2037
In		0	CDR	LT		Waivers	Eligible	7/1/2016	6/29/2037
In		0	CDR	LCDR		Waivers	Eligible	7/1/2016	6/28/2037
In		0	CDR	LT		Waivers	Eligible	7/1/2016	6/30/2037
In		0	LCDR	LT		Waivers	Eligible	7/1/2016	6/30/2041
In		0	LCDR	LT		Waivers	Eligible	7/1/2016	6/27/2041
In		0	LCDR	LT		Waivers	Eligible	7/1/2016	7/6/2038
In		0	LCDR	LT		Waivers	Eligible	7/1/2016	6/28/2041
In		0	LCDR	LCDR		Waivers	Eligible	7/1/2016	11/23/2036
In		0	CAPT	LCDR		Waivers	Not Elig		1/2/2029
In		0	CDR	LCDR		Waivers	Not Elig		7/26/2032
In		0	CDR	LT		Waivers	Not Elig		9/22/2027

6.3 Adding EPP Candidates to Temp Grade Boards

EPP candidates will appear on temp grade boards as “Not Eligible”. Users will add EPP candidates to the board by changing the Cand Status value from “Not Eligible” to “EPP”. The steps below will guide the user through adding EPP candidates a board.

1. Use the steps in [‘6.1 Viewing Board Candidates’](#) to pull up the temp grade boards that EPP candidates will be added to.
2. Use the ‘Find’ link in the top right corner of the Board Candidates grid to search for EPP candidates to add to the temp grade board.

The screenshot shows the 'Board Candidate' interface. At the top, it displays 'Board Type: PHSENG PHS Engineer Promo Board' and 'AD/Res Ind: Active Status: In-Session Seq: 2 Cut/Sig#:'.

Below this is the 'Board/Panel Candidates' section. It features a grid with columns: Zone, Empl ID, Rcd#, Rank, Temp/Perm - Perm Rank, Name, Waivers, Cand Status, Received Dt, and Exp AD Term. The 'Cand Status' column is currently set to 'Eligible' for all four visible candidates.

At the top right of the grid, there are buttons for 'Elig', 'Inelig to Elig', and 'Del Below Zone'. A red arrow points to the 'Find' button in the top right corner of the grid area.

3. Use the Script Prompt to enter the Empl Id of the EPP candidate that needs to be added to the temp grade board.

The screenshot shows a dialog box titled 'direct-access.us needs some information'. It contains a 'Script Prompt:' label and a text input field with the placeholder text 'Enter search string:'. There are 'OK' and 'Cancel' buttons at the bottom right of the dialog.

4. Click OK.

- Use the dropdown on the Cand Status value to change the status from “Not Eligible” to “EPP”.

Board Candidate

Board Type: PHSENG PHS Engineer Promo Board Elig Inelig to Elig

AD/Res Ind: Active Status: In-Session Seq: 2 Cut/Sig#: Del Below Zone

Board/Panel Candidates Customize | Find | View 100 | First 101-150 of

Member Information Officer Status Board Information Description

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term
122	In	0	CDR	LT		Waivers	Not Elig		06/22/2021
123	In	0	CDR	LCDR		Waivers	Not Elig		11/01/2031
124	In	0	CDR	LT		Waivers	Not Elig		08/18/2032

- Repeat steps 2-5 to add all EPP candidates to the temp grade boards.

Board Candidate

Board Type: PHSENG PHS Engineer Promo Board Elig Inelig to Elig

AD/Res Ind: Active Status: In-Session Seq: 2 Cut/Sig#: Del Below Zone

Board/Panel Candidates Customize | Find | View 100 | First 151-200 of 283 Las

Member Information Officer Status Board Information Description

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term
151	In	0	CDR	LT		Waivers	EPP		01/07/2035
152	In	0	CDR	LCDR		Waivers	EPP		04/28/2026
153	In	0	CDR	LCDR		Waivers	EPP		05/08/2030
154	In	0	CDR	LCDR		Waivers	Not Elig		10/23/2030

- Once all EPP candidates have been added to the board, click Save at the bottom of the page to commit the changes. **IMPORTANT:** Please be sure to check EPP adds before saving the changes. Once the page is saved, the EPP candidates will be saved to an EPP record that will be used to manage EPP review history.

163	In	0	CDR	LT		Waivers	Not Elig		02/11/2030	+	-
164	In	0	CDR	LCDR		Waivers	EPP		07/14/2032	+	-
165	In	0	CDR	LT		Waivers	EPP		11/12/2030	+	-

Save Return to Search Previous in List Next in List

6.4 Deleting Board Candidates from the Board

1. Follow the steps in section [‘6.1 Viewing Board Candidates’](#) to search for the board.
2. Follow steps 2-4 in section [‘6.3 Adding EPP Candidates to Temp Grade Boards’](#) to search for candidates to delete
3. Click the “-” button on the candidate row that you want to remove from the board.

Board Candidate

Board Type: PHSENG PHS Engineer Promo Board

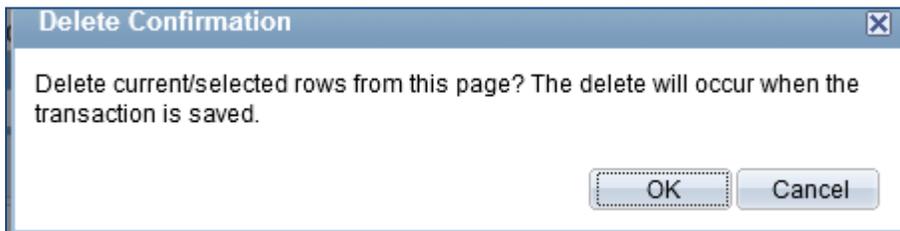
AD/Res Ind: Active Status: In-Session Seq: 2 Cut/Sig#:

Elig Inelig to Elig Del Below Zone

Board/Panel Candidates

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term		
2	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	12/07/2026	+	-
3	In	0	CDR	CDR		Waivers	Eligible	07/01/2015	02/02/2018	+	-
4	In	0	CDR	CDR		Waivers	Eligible	07/01/2015	02/03/2032	+	-
5	In	0	CDR	LCDR		Waivers	Eligible	07/01/2015	01/07/2031	+	-

4. Click the OK button in the Delete Confirmation pop-up box.



5. Repeat steps 2-5 to delete all candidates that need to be removed from the board.
6. Once all candidates that need to be removed have been deleted from the board, click the Save button to commit the changes. **IMPORTANT:** Once candidates have been deleted from the board, they can only be added back by using the “+” sign to manually add or repopulating the entire board.

163	In	0	CDR	LT		Waivers	Not Elig		02/11/2030	+	-
164	In	0	CDR	LCDR		Waivers	EPP		07/14/2032	+	-
165	In	0	CDR	LT		Waivers	EPP		11/12/2030	+	-

Save Return to Search Previous in List Next in List

6.5 Selecting Candidates for Promotion

Posting information such as Job Descriptions, Contact Information, or Posting Dates may need to be updated based upon the needs of the Agency. Follow the steps below to update job posting information.

1. Follow the steps in section [‘6.1 Viewing Board Candidates’](#) to search for the board.
2. Use the Cand Status field to update board candidate status values.

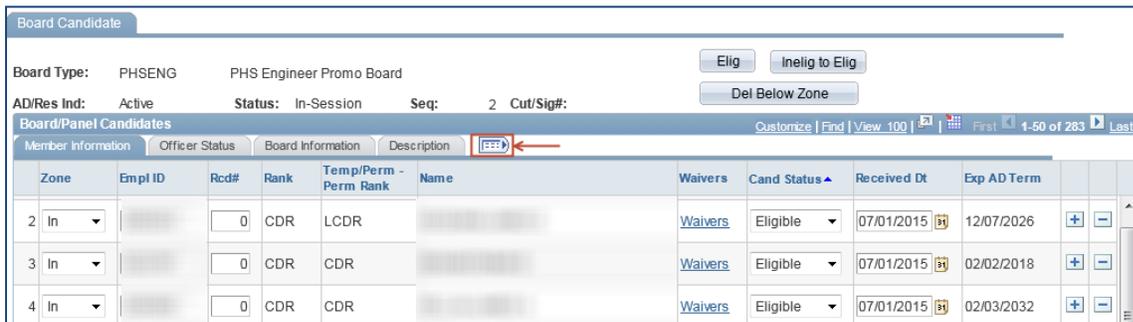
Cand Status Value	Description
Above Cut	Above Cut (Officers who are recommended for promotion AND above the success rate line) – Manually set by user . NOTE: Users will only be able to promote officers selected as Above Cut
Decile	Lowest Decile – Manually set by user
Defer	Promotion Deferred – Manually set by user
Eligible	Eligible for promotion – Automatically set when eligibility is run
EPP	EPP eligible added to temp grade board – Manually set by user
Not Eligible	Not Eligible for promotion – Automatically set when eligibility is run
Not Selected	Not Selected for promotion – Manually set by user
Not Selected Below	Selected Below the line – Manually set by user
Selected	Selected for promotion – Manually set by user
Quartile	Lowest Quartile – Manually set by user
Undecided	Eligibility has not been run on the board OR Candidate has bad job data that prevents the eligibility program from processing eligibility – Automatically set when boards are popped or eligibility is run

The screenshot displays a 'Board Candidate' interface. At the top, it shows 'Board Type: PHSENG PHS Engineer Promo Board' and 'AD/Res Ind: Active Status: In-Session Seq: 2 Cut/Sig#:'.

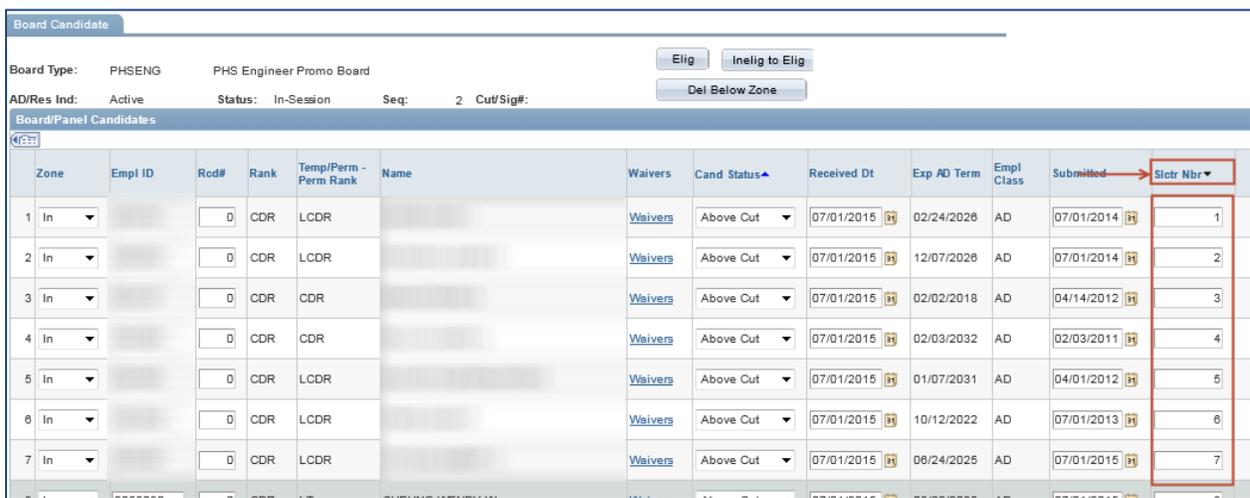
The main area is a table titled 'Board/Panel Candidates' with columns: Zone, Empl ID, Rcd#, Rank, Temp/Perm - Perm Rank, Name, Waivers, Received Dt, and Exp AD Term. There are 7 rows of candidate data.

A dropdown menu is open over the 'Elig' column, showing various status options: 2 yrs Inel, 5 yrs Inel, Above Cut (highlighted), Adv Prev, Alternate, Basic, Decile, Defer, Denied, EPP, Eligible (highlighted), Exempt, Held, No EPQ, Non Sel, Non Sel Be, None, Not Elig (highlighted), Not Qualfd, Primary, Quartile (highlighted), RNA, Refused, Select, Undecided, Unsat Perf, and Eligible.

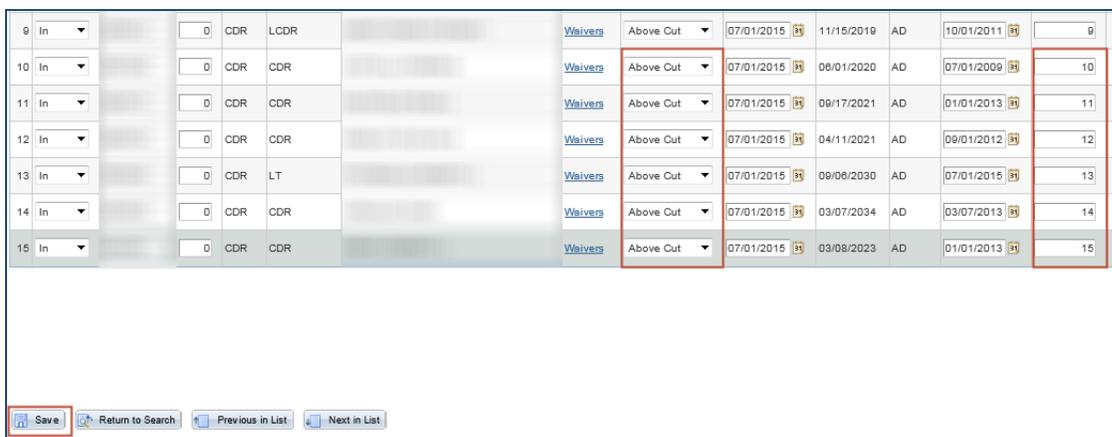
- Use the 'Expand Grid' icon to expand the Board Candidates grid to view the Slctr Nbr field.



- Rank order Above Cut officers using the Slctr Nbr field. NOTE: Officers should be ordered according to their promotion effective date (i.e. all 7/1 promotions ranked first, 7/15 promotions ranked next, 8/1 promotion ranked next...).



- Once all "Above Cut" candidates have been rank ordered, save the page.



- Repeat steps 1-5 for all temp grade and perm grade promotion boards until all promotion candidates have been identified as "Above Cut" and rank ordered on their respective board.

7 PROMOTE OFFICERS

Authorized users will have the ability to promote PHS officers in Direct Access via the Post Board Activities component. This section of the user guide outlines the steps for bringing candidates into Post Board Activities for promotion, promoting officers via Post Board Activities, and validating updates to Board Candidates Job Data as a result of promotions.

7.1 Promote Advance Numbers

1. Navigate to the Promote Advance Numbers via:

Enterprise Menu > Career Management > Post Board – Promote/Advance > Promote/Advance Numbers



2. Click Add New Value.

The screenshot shows the 'Promote/Advance Numbers' search form. It includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red box. Below the buttons is a text input field for 'Maximum number of rows to return (up to 300):' with the value '300'. There are three dropdown menus for 'List ID:', 'Effective Date:', and 'Active Duty Reserve Indicator:'. The 'Effective Date:' dropdown has a calendar icon with the number '31'. At the bottom, there is a checkbox labeled 'Correct History'.

- Enter the List ID, Effective Date, Active Duty Reserve Indicator.

Field	Description/Instruction
List ID	PHS Officer Promotions
Effective Date	Effective date of the promotion
Active Duty Reserve Indicator	Active Duty

- Click Add. The Promote/Advance Numbers list will display.

- Enter the Promote/Advance Number fields as described below. **NOTE:** This page will only need to be setup on the first use. After the initial use, the setup values will carry forward to subsequent promotion lists that are created.

Field	Description/Instruction
Group ID	Enter the Group ID from the board setup via Maintain Boards
Job Code	Enter the Promo Job Code from the board setup via Maintain Boards
Description	Job Code Description. This will populate once the Job Code has been entered
Promo/Adv Nbr	Enter the number of candidates to promote on the effective date of the promotion list.
Nbr Selected	The number of candidates available to promote from each board. This will populate once the Group ID and Job Code have been entered. This number is determined by the number of “Above Cut” candidates on the board that have not been promoted. NOTE: If this number is 0, there are no candidates selected as ‘Above Cut’ OR all ‘Above Cut’ candidates have been promoted

Board Type	Group ID	Promo Job Code
PHSMED	PHSPROMO_TG	010097
PHSDEN	PHSPROMO_TG	020097
PHSNUR	PHSPROMO_TG	030097
PHSENG	PHSPROMO_TG	040097
PHSSCI	PHSPROMO_TG	050297
PHSEHO	PHSPROMO_TG	060097
PHSVET	PHSPROMO_TG	070097
PHSPHA	PHSPROMO_TG	080097
PHSDIE	PHSPROMO_TG	090097
PHSTHE	PHSPROMO_TG	0T0197
PHSHSO	PHSPROMO_TG	0H1097
PHSO2P	PHSPG_O2	000097
PHSO3P	PHSPG_O3	000096
PHSO4P	PHSPG_O4	000095
PHSO5N	PHSPG_O5N	000094
PHSO5R	PHSPG_O5R	000094
PHSO6P	PHSPG_O6	000093

6. After all Group IDs and Promo Job Codes have been entered there should be 17 rows in the promotion list.

Promote/Advance Numbers

List ID: PHS Officer Promotions Eff Date: 07/01/2015 AD/Res Ind: Active

Customize | Find | | First | 1-17 of 17 | Last

	Group ID	Job Code	Description	Promo/Adv Nbr	Nbr Selected		
1	<input type="text" value="PHSPG"/>	<input type="text" value="000093"/>	Captain	<input type="text"/>	3	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="PHSPG"/>	<input type="text" value="000094"/>	Commander	<input type="text" value="1"/>	0	<input type="button" value="+"/>	<input type="button" value="-"/>
3	<input type="text" value="PHSPG"/>	<input type="text" value="000094"/>	Commander	<input type="text"/>	0	<input type="button" value="+"/>	<input type="button" value="-"/>
4	<input type="text" value="PHSPG"/>	<input type="text" value="000095"/>	Lieutenant Commander	<input type="text"/>	5	<input type="button" value="+"/>	<input type="button" value="-"/>
5	<input type="text" value="PHSPG"/>	<input type="text" value="000096"/>	Lieutenant	<input type="text"/>	0	<input type="button" value="+"/>	<input type="button" value="-"/>
6	<input type="text" value="PHSPG"/>	<input type="text" value="000097"/>	Lieutenant Junior Grade	<input type="text"/>	3	<input type="button" value="+"/>	<input type="button" value="-"/>
7	<input type="text" value="PHSPR"/>	<input type="text" value="010097"/>	Asst Surgeon	<input type="text"/>	0	<input type="button" value="+"/>	<input type="button" value="-"/>
8	<input type="text" value="PHSPR"/>	<input type="text" value="020097"/>	Asst Dental Surgeon	<input type="text"/>	0	<input type="button" value="+"/>	<input type="button" value="-"/>
9	<input type="text" value="PHSPR"/>	<input type="text" value="030097"/>	Asst Nurse Officer	<input type="text"/>	0	<input type="button" value="+"/>	<input type="button" value="-"/>

- In the 'Promo/Adv Nbr' field enter the number of officers to promote from each board for the promotion effective date you are working. Ex. If you are working 7/1/2015 promotions, enter the number of officers that should be promoted from each board on the 7/1/2015 effective date. The Promo/Adv Nbr should match the number of officers selected in Board Candidates to be promoted on 7/1/2015.

Promote/Advance Numbers						
List ID: PHS Officer Promotions		Eff Date: 07/01/2015		AD/Res Ind: Active		
Group ID	Job Code	Description	Promo/Adv Nbr	Nbr Selected		
1	PHSPG	000093	Captain	1	3	+ -
2	PHSPG	000094	Commander	1	0	+ -
3	PHSPG	000094	Commander		0	+ -
4	PHSPG	000095	Lieutenant Commander	5	5	+ -
5	PHSPG	000096	Lieutenant		0	+ -
6	PHSPG	000097	Lieutenant Junior Grade	2	3	+ -
7	PHSPR	010097	Asst Surgeon		0	+ -
8	PHSPR	020097	Asst Dental Surgeon		0	+ -
9	PHSPR	030097	Asst Nurse Officer		0	+ -
10	PHSPR	040097	Asst Engineer		0	+ -
11	PHSPR	050297	Asst Scientist		0	+ -

- Once all selections have been made click save at the bottom of the page.

13	PHSPR	070097	Asst Vetrin Off	4	0	+ -
14	PHSPR	080097	Asst Pharmacist		0	+ -
15	PHSPR	090097	Asst Dietitian		0	+ -
16	PHSPR	0H1097	Asst Health Serv Off		4	+ -
17	PHSPR	0T0197	Asst Therapist		2	+ -

Save
Return to Search
Previous in List
Next in List
Add
Update/Display

The candidates will now be available in Post Board Activities for you to promote.

7.2 Download Promote/Advance Numbers List

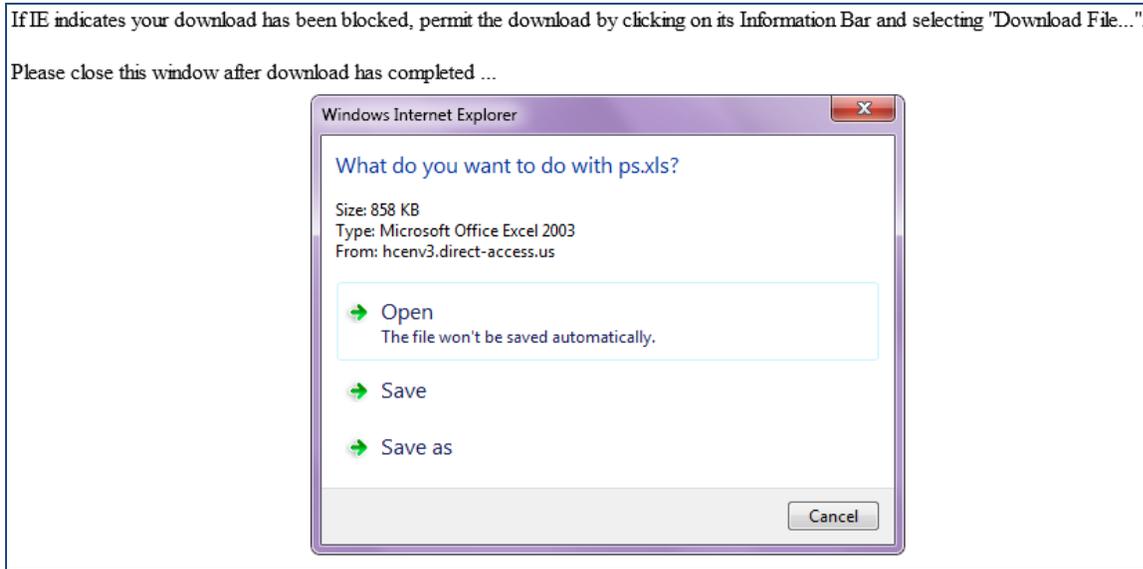
Once officers are promoted, the 'Nbr Selected' value will decrease to show the number of candidates that are still available to be promoted (Officers who are "Above Cut" and NOT promoted in Board Candidates). Users have the option of downloading each Promote/Advance Numbers list to track the number of officers available for promotion and promoted from each list.

Promote/Advance Numbers						
List ID: PHS Officer Promotions		Eff Date: 07/01/2015		AD/Res Ind: Active		
Group ID	Job Code	Description	Promo/Adv Nbr	Nbr Selected		
1	PHSPG	000093	Captain	1	3	+ -
2	PHSPG	000094	Commander	1	0	+ -
3	PHSPG	000094	Commander		0	+ -
4	PHSPG	000095	Lieutenant Commander	5	5	+ -
5	PHSPG	000096	Lieutenant		0	+ -
6	PHSPG	000097	Lieutenant Junior Grade	2	3	+ -
7	PHSPR	010097	Asst Surgeon		0	+ -
8	PHSPR	020097	Asst Dental Surgeon		0	+ -
9	PHSPR	030097	Asst Nurse Officer		0	+ -
10	PHSPR	040097	Asst Engineer		0	+ -
11	PHSPR	050297	Asst Scientist		0	+ -

1. Click the 'Download' icon in the top right corner of the Promote/Advance Numbers grid.

Promote/Advance Numbers						
List ID: PHS Officer Promotions		Eff Date: 07/01/2015		AD/Res Ind: Active		
Group ID	Job Code	Description	Promo/Adv Nbr	Nbr Selected		
1	PHSPG	000093	Captain	1	3	+ -
2	PHSPG	000094	Commander	1	0	+ -
3	PHSPG	000094	Commander		0	+ -
4	PHSPG	000095	Lieutenant Commander	5	5	+ -

- Click Open or Save to view the downloaded list in an excel format.

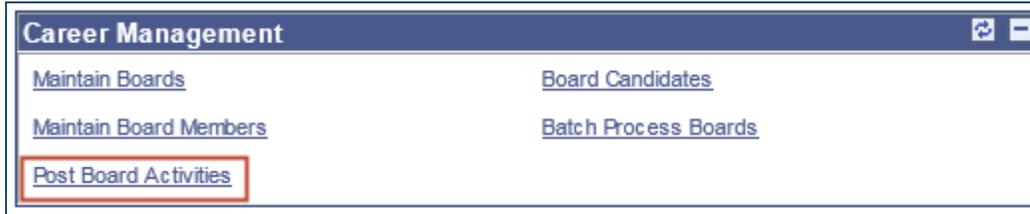


NOTE: It is suggested that you save the list using a distinguishable naming convention (i.e. PromoNumbers07012015 to signify promotion numbers for 07/01/2015, PromoNumber07152015 to signify promotion numbers for 07/15/2015) to help keep track of promotion number changes/counts during the promotion year.

	A	B	C	D	E
1	Group ID	Job Code	Description	Promo/Adv Nbr	Nbr Selected
2	PHSPG_O6	000093	Captain	1	3
3	PHSPG_O5N	000094	Commander	1	0
4	PHSPG_O5R	000094	Commander		0
5	PHSPG_O4	000095	Lieutenant Commander	5	5
6	PHSPG_O3	000096	Lieutenant		0
7	PHSPG_O2	000097	Lieutenant Junior Grade	2	3
8	PHSPROMO_TG	010097	Asst Surgeon		0
9	PHSPROMO_TG	020097	Asst Dental Surgeon		0
10	PHSPROMO_TG	030097	Asst Nurse Officer		0
11	PHSPROMO_TG	040097	Asst Engineer		0
12	PHSPROMO_TG	050297	Asst Scientist		0
13	PHSPROMO_TG	060097	Asst Sanitarian		0
14	PHSPROMO_TG	070097	Asst Vetrin Off	4	0
15	PHSPROMO_TG	080097	Asst Pharmacist		0
16	PHSPROMO_TG	090097	Asst Dietitian		0
17	PHSPROMO_TG	0H1097	Asst Health Serv Off		4
18	PHSPROMO_TG	0T0197	Asst Therapist		2

7.3 Post Board Activities

1. Click the [Post Board Activities](#) link in the Career Management portal pagelet.



2. Enter the List ID, Effective Date, and Active Duty Reserve Indicator. These values should be the same as the values from the Promote/Advance Numbers list that you selected candidates.
3. Click Search.

Post Board Activities

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):

List ID: = ▼ PHS Officer Promotions ▼

Effective Date: = ▼ 07/01/2015 📅

Active Duty Reserve Indicator: = ▼ Active Duty ▼

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

The page will display the number of candidates selected in Promote/Advance Numbers in the Promo/Adv Nbr field.

Cg Prom Adv

List ID: PHS Officer Promotions AD/Res Ind: Active Eff Date: 07/01/2015

Date of Rank: 📅

Promote/Advance Member(s) Customize | Find | View All | 📄 | 📊 First 1-8 of 8 Last

Member Information		DOR/Promote								
Empl ID	Empl Rcd	Zone	Rank	Name	Over Weight	Group ID	Job Code	Grade Entry Date	Selector Number	
1		0 In	CAPT		<input checked="" type="checkbox"/>	PHSPG_O6	000094	07/01/2011	55	
2		0 In	CDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2015	1	
3		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2012	2	
4		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2010	3	
5		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2014	4	
6		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2014	5	

- Use the 'Show all columns' icon to expand the Promote/Advance Members grid to view all information about the candidates to be promoted.

Cg Prom Adv

List ID: PHS Officer Promotions AD/Res Ind: Active Eff Date: 07/01/2015

Date of Rank:

Promote/Advance Member(s) Customize | Find | View All | | First 1-8 of 8 Last

Member Information DOR/Promote ←

	Empl ID	Empl Rcd	Zone	Rank	Name	Over Weight	Group ID	Job Code	Grade Entry Date	Selector Number
1			0 In	CAPT		<input checked="" type="checkbox"/>	PHSPG_O6	000094	07/01/2011	55
2			0 In	CDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2015	1
3			0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2012	2
4			0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2010	3

- Enter the Date of Rank at the top of the page and tab out. Once you tab out the 'Set All' button will become available for you to hit.

Cg Prom Adv

List ID: PHS Officer Promotions AD/Res Ind: Active Eff Date: 07/01/2015

Date of Rank:

Promote/Advance Member(s) Customize | Find | View All | | First

	Empl ID	Empl Rcd	Zone	Rank	Name	Over Weight	Group ID	Job Code	Grade Entry Date	Selector Number	Board Type Code	Active Duty Reserve Indicator	Convene Date	Rank/Contract Begin Date	Contract End Date	Uniform Allowance	Promote
1			0 In	CAPT		<input checked="" type="checkbox"/>	PHSPG_O6	000094	07/01/2011	55	PHSO6P	Active	03/01/2015	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>
2			0 In	CDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2015	1	PHSO4P	Active	03/01/2015	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>
3			0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2012	2	PHSO4P	Active	03/01/2015	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>
4			0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2010	3	PHSO4P	Active	03/01/2015	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>
5			0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_O4	000096	07/01/2014	4	PHSO4P	Active	03/01/2015	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>

Field	Description/Instructions
Date of Rank	This is the officer's promotion effective date. This is the date a new job row will be inserted for the member's promoted temp grade and/or perm grade rank
EmplID	This is the member's employee ID in Direct Access.
Empl Rcd	Employee record number. N/A
Board Type Code	This is the type of board the member is a candidate on.
Active Duty Reserve Indicator	This displays the member's status. Default value for PHS
Convene Date	The convene (start) date of the board
Rank/Contract Begin Date	This is the officer's promotion effective date
Contract End Date	Not used by PHS
Uniform Allowance	Not used by PHS
Promote	This is checked/unchecked

- Click the 'Set All' button. This will set all of the officers Rank/Contract Begin Dates to the 'Date of Rank' that was entered. The Promote check boxes that were grayed out will now display a check in them signifying the officers will be promoted.

List ID: PHS Officer Promotions AD/Res Ind: Active Eff Date: 07/01/2015

Date of Rank: 07/01/2015

Empl ID	Empl Rcd	Zone	Rank	Name	Over Weight	Group ID	Job Code	Grade Entry Date	Selector Number	Board Type Code	Active Duty Reserve Indicator	Convence Date	Rank/Contract Begin Date	Contract End Date	Uniform Allowance	Promote
1		0 In	CAPT		<input checked="" type="checkbox"/>	PHSPG_06	000094	07/01/2011	55	PHSO6P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
2		0 In	CDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	07/01/2015	1	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
3		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	07/01/2012	2	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
4		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	07/01/2010	3	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
5		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	07/01/2014	4	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
6		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	04/01/2014	5	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
7		0 In	LT		<input checked="" type="checkbox"/>	PHSPG_02	000098	09/06/2013	1	PHSO2P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
8		0 In	LT		<input checked="" type="checkbox"/>	PHSPG_02	000098	05/15/2012	2	PHSO2P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>

- Verify all officers have the correct 'Date of Rank' and check in the Promote checkbox.
- Click the 'Download' icon in the top right corner of the Promote/Members grid to download and save a list of the officers that are being promoted.

Promote/Advance Member(s)

Empl ID	Empl Rcd	Zone	Rank	Name	Over Weight	Group ID	Job Code	Grade Entry Date	Selector Number	Board Type Code	Active Duty Reserve Indicator	Convence Date	Rank/Contract Begin Date	Contract End Date	Uniform Allowance	Promote
1		0 In	CAPT		<input checked="" type="checkbox"/>	PHSPG_06	000094	07/01/2011	55	PHSO6P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
2		0 In	CDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	07/01/2015	1	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
3		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	07/01/2012	2	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>
4		0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000096	07/01/2010	3	PHSO4P	Active	03/01/2015	07/01/2015			<input checked="" type="checkbox"/>

- Click Open or Save to view the promotion list in a downloaded excel format.

If IE indicates your download has been blocked, permit the download by clicking on its Information Bar and selecting "Download File...".

Please close this window after download has completed ...

Windows Internet Explorer

What do you want to do with ps.xls?

Size: 858 KB
Type: Microsoft Office Excel 2003
From: hcenv3.direct-access.us

Open
 The file won't be saved automatically.

Save

Save as

NOTE: It is suggested that you save the list using a distinguishable naming convention (i.e. PromoList07012015 to signify promotion list for 07/01/2015, PromoList07152015 to signify promotion list for 07/15/2015) to help keep track of promotion lists during the promotion year.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Empl ID	Empl	Zon	Rank	Name	Over	GroupID	JobCode	Grade Entry	Selector	Board Type	Active Duty Reserve	Corwene	Rank/Contract Begin	Contract End	Uniform	Promote
2		0 In	CAPT			Y	PHSPG_06	94	7/1/2011	55	PHSO6P	Active	3/1/2015	7/1/2015			Y
3		0 In	CDR			Y	PHSPG_04	96	7/1/2015	1	PHSO4P	Active	3/1/2015	7/1/2015			Y
4		0 In	LCDR			Y	PHSPG_04	96	7/1/2012	2	PHSO4P	Active	3/1/2015	7/1/2015			Y
5		0 In	LCDR			Y	PHSPG_04	96	7/1/2010	3	PHSO4P	Active	3/1/2015	7/1/2015			Y
6		0 In	LCDR			Y	PHSPG_04	96	7/1/2014	4	PHSO4P	Active	3/1/2015	7/1/2015			Y
7		0 In	LCDR			Y	PHSPG_04	96	4/1/2014	5	PHSO4P	Active	3/1/2015	7/1/2015			Y
8		0 In	LT			Y	PHSPG_02	98	9/6/2013	1	PHSO2P	Active	3/1/2015	7/1/2015			Y
9		0 In	LT			Y	PHSPG_02	98	5/15/2012	2	PHSO2P	Active	3/1/2015	7/1/2015			Y

10. After saving the excel file, return to the Post Board Activities page and click the ‘Save’ button.

	0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000098	07/01/2014	4	PHSO4P	Active	03/01/2015	07/01/2015	<input type="text"/>	<input type="text"/>
	0 In	LCDR		<input checked="" type="checkbox"/>	PHSPG_04	000098	04/01/2014	5	PHSO4P	Active	03/01/2015	07/01/2015	<input type="text"/>	<input type="text"/>
	0 In	LT		<input checked="" type="checkbox"/>	PHSPG_02	000098	09/06/2013	1	PHSO2P	Active	03/01/2015	07/01/2015	<input type="text"/>	<input type="text"/>
	0 In	LT		<input checked="" type="checkbox"/>	PHSPG_02	000098	05/15/2012	2	PHSO2P	Active	03/01/2015	07/01/2015	<input type="text"/>	<input type="text"/>

[Create OPAL](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

11. You will be taken to the Process Monitor page. Click the Refresh button at the top of the page.

Process List **Server List**

View Process Request For

User ID: Type: Last 90 Days [Refresh](#)

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

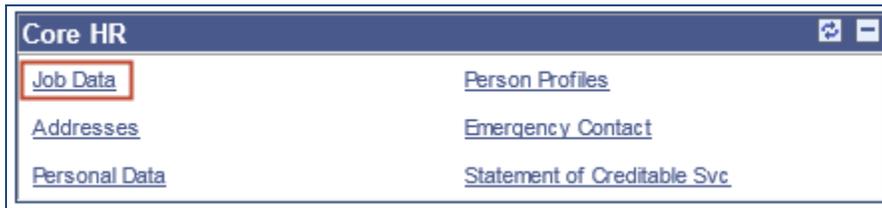
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	268143		Application Engine	CG_BOARDPRCS		08/09/2015 11:28:37AM PDT	Success	Posted	Details

12. Once the ‘Run Status’ is Success and ‘Distribution Status’ Posted:

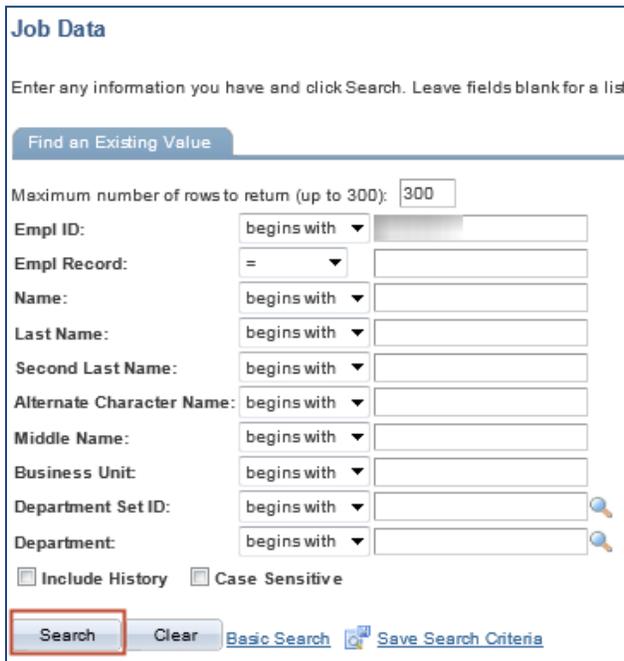
- a. A new job row will appear in Job Data
 - Temp Promotion Action/Reason: Promotion/Advancement
 - Perm Promotion Action/Reason: Promotion/Normal Career Progression
- b. The ADV flag will be checked in Board Candidates

7.4 Validate Promotions in Job Data

1. Click the [Job Data](#) link in the Core HR portal pagelet.

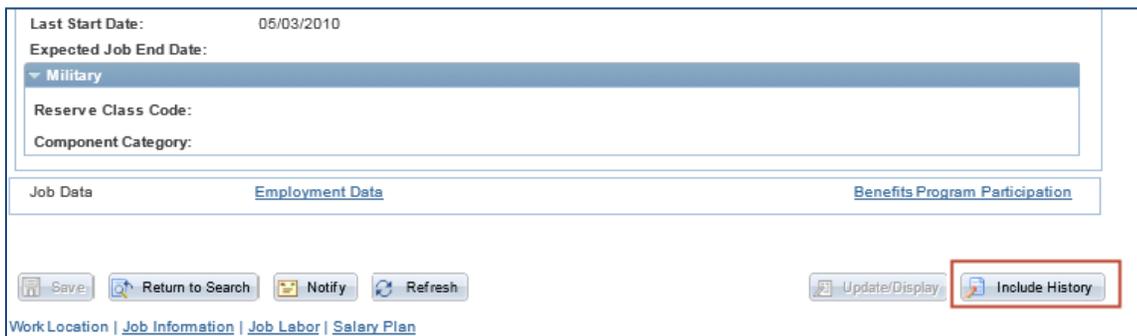


2. Enter the Empl Id of the promoted officer and click 'Search'.



The screenshot shows the "Job Data" search form. It includes a "Find an Existing Value" tab, a "Maximum number of rows to return (up to 300):" field set to 300, and several search criteria fields: "Empl ID:", "Empl Record:", "Name:", "Last Name:", "Second Last Name:", "Alternate Character Name:", "Middle Name:", "Business Unit:", "Department Set ID:", and "Department:". Each field has a "begins with" dropdown menu. There are also checkboxes for "Include History" and "Case Sensitive". The "Search" button is highlighted with a red box. Other buttons include "Clear", "Basic Search", and "Save Search Criteria".

3. Use the 'Include History' button to toggle between the current and prior job row to validate changes to data.



The screenshot shows the "Job Data" details page. It includes fields for "Last Start Date:" (05/03/2010) and "Expected Job End Date:". Below these is a "Military" section with a dropdown menu and fields for "Reserve Class Code:" and "Component Category:". The page has tabs for "Job Data", "Employment Data", and "Benefits Program Participation". At the bottom, there are buttons for "Save", "Return to Search", "Notify", "Refresh", "Update/Display", and "Include History". The "Include History" button is highlighted with a red box. The footer contains links for "Work Location", "Job Information", "Job Labor", and "Salary Plan".

4. Select the **Work Location** tab to view new job row with appropriate Action and Reason values.
 - a. Temp Grade Promotion: Promotion/Advancement
 - b. Perm Grade Promotion: Promotion/Normal Career Progression

Work Location | Job Information | Job Labor | Salary Plan

Employee Empl ID: [redacted] Empl Record: 0

Military Service:

Work Location Find First 1 of 28 Last

Effective Date: 07/01/2015 Go To Row

Effective Sequence: 0 Action: Promotion

HR Status: Active Reason: Normal Career Progression

Payroll Status: Active Job Indicator: Primary Job

Current

- Select the **Job Information** tab to view updated to Job Code and Entry Date for temp grade promotions.
NOTE: There will be no updates to Job Code and Entry Date for perm grade promotions.

Work Location | Job Information | Job Labor | Salary Plan

Employee Empl ID: [redacted] Empl Record: 0

Military Service:

Job Information Find First 1 of 28 Last

Effective Date: 07/01/2015 Go To Row

Effective Sequence: 0 Action: Promotion

HR Status: Active Reason: Normal Career Progression

Payroll Status: Active Job Indicator: Primary Job

Current

Job Code: 030093 Nurse Director

Entry Date: 07/01/2011

Supervisor Level: Y Supervisory Position

- Select the **Job Labor** tab to view updated Labor Agreement Entry Dt and Employee Subcategory 2 data for perm grade promotions.
NOTE: There will be no updates to Labor Agreement Entry Dt and Employee Subcategory 2 data for temp grade promotions.

Work Location | Job Information | Job Labor | Salary Plan

Employee Empl ID: [redacted] Empl Record: 0

Military Service:

Labor Information Find First 1 of 28 Last

Effective Date: 07/01/2015 Go To Row

Effective Sequence: 0 Action: Promotion

HR Status: Active Reason: Normal Career Progression

Payroll Status: Active Job Indicator: Primary Job

Current

Bargaining Unit:

Labor Agreement: PHS PHS

Labor Agreement Entry Dt: 07/01/2015

Employee Category: B Regular

Employee Subcategory: PERM Permanent Officer

Employee Subcategory 2: 000093 CAPT

Position Management Record

7. Select the **Job Labor** tab and scroll to the bottom of the page to view updated Labor Seniority Dates.
8. Click the View All link in the top right corner of the Assigned Seniority Dates grid.

Assigned Seniority Dates				
Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
ACTIVE DUTY BASE DATE		05/14/1990	<input checked="" type="checkbox"/>	
AD PAY SCALE DATE			<input type="checkbox"/>	
COMMISSION DATE		05/14/1990	<input checked="" type="checkbox"/>	
CREDITABLE SERVICE DAT			<input type="checkbox"/>	
CURRENT AD DATE		10/01/1990	<input checked="" type="checkbox"/>	

9. Validate updated seniority dates according to the promotion type
 - a. Temp Grade Promotion updates the following:
 - Date of Rank
 - b. Perm Grade Promotion updates the following:
 - Seniority Credit Date

COMMISSIONED CORPS DATE		07/12/1990	<input checked="" type="checkbox"/>	
PROMOTION CREDIT DATE		07/01/1994	<input checked="" type="checkbox"/>	
PAY BASE DATE		05/14/1990	<input checked="" type="checkbox"/>	
DATE OF RANK	030093	07/01/2011	<input checked="" type="checkbox"/>	
ROTATION DATE			<input type="checkbox"/>	
SENIORITY CREDIT DATE		07/01/2015	<input checked="" type="checkbox"/>	
TRAINING EXPERIENCE DATE		07/01/1987	<input checked="" type="checkbox"/>	

Recalculate Seniority Dates

10. Select the Salary Plan tab to view updated Grade and Grade Entry Date data for temp grade promotions.
NOTE: There will be no updates to Grade and Grade Entry Date for perm grade promotions.

Work Location | Job Information | Job Labor | **Salary Plan**

Employee: [Redacted] Empl Record: 0

Military Service:

Salary Plan

Effective Date: 07/01/2015

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Promotion

Reason: Normal Career Progression

Job Indicator: Primary Job

Current

Military

Rank: [Redacted] Rank Entry Date: [Redacted]

Worn Rank: [Redacted]

Worn Rank Type: [Redacted]

Skill Grade: [Redacted]

Salary Admin Plan: OFF

Grade: O6

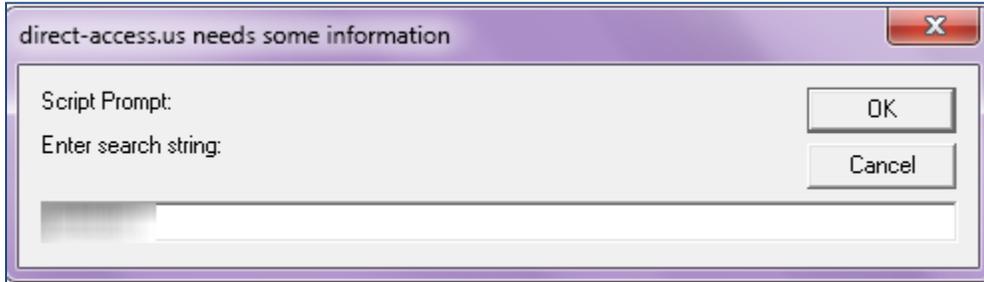
Step: 24

Grade Entry Date: 07/01/2011

Step Entry Date: 05/14/2014

7.5 Validate Promotions in Board Candidates

1. Follow the steps in section [‘6.1 Viewing Board Candidates’](#) to search for the board.
2. Use the ‘Find’ link in the top right corner of the Board Candidates grid to search for the promoted candidates.
3. Use the Script Prompt to enter the Empl Id of the promoted candidate(s) that you want to validate.



4. Click OK.

All promoted candidates will have a check in the ADV checkbox.

Zone	Empl ID	Rcd#	Rank	Temp/Perm - Perm Rank	Name	Waivers	Cand Status	Received Dt	Exp AD Term	Empl Class	Submitted	Sictr Nbr	Eligibility	Adv
3	In	0	CAPT	CDR		Waivers	Above Cut	07/01/2015	07/11/2020	AD	07/10/2015	55	Eligibility	<input checked="" type="checkbox"/>
4	In	0	CAPT	CAPT		Waivers	Above Cut	07/01/2015	08/14/2018	AD	07/10/2015	54	Eligibility	<input checked="" type="checkbox"/>
6	In	0	CAPT	CAPT		Waivers	Above Cut	07/01/2015		AD	07/10/2015	53	Eligibility	<input checked="" type="checkbox"/>
8	In	0	CAPT	CAPT		Waivers	Above Cut	07/01/2015		AD	07/10/2015	52	Eligibility	<input checked="" type="checkbox"/>

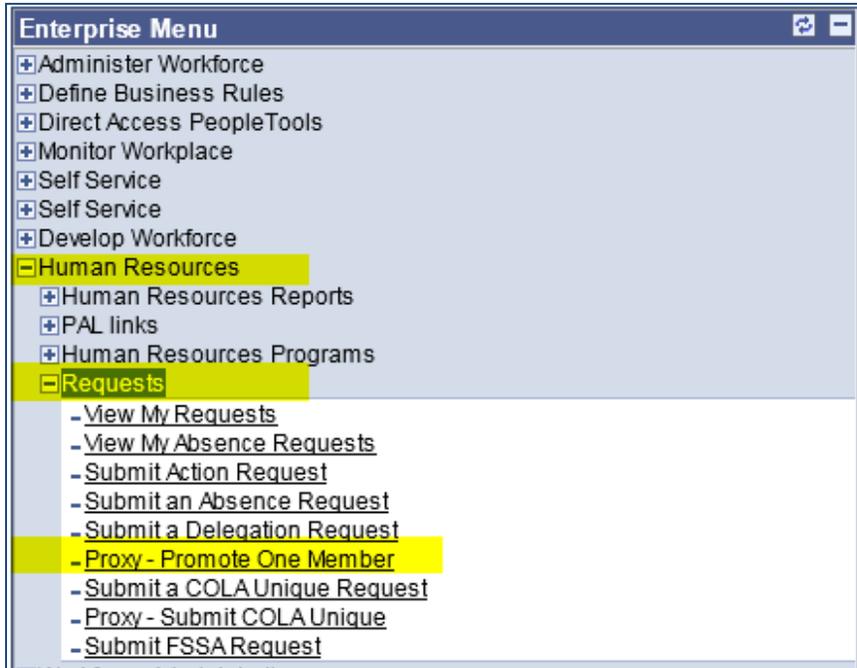
8 ADVANCE PROMOTE ONE MEMBER

Authorized users will have the ability to submit a promotion request and submit a promotion reversion request via Advance Promote One Member (APOM). This section of the user guide outlines the steps for submitting and approving APOM requests.

8.1 Promote One Officer

1. Navigate to Advance Promote One Member page via:

Enterprise Menu > Human Resources > Requests > Proxy – Promote One Member



2. Enter the Empl Id of the officer to promote.
3. Click the Empl Rcd number field to select the correct PHS employment record.
IMPORTANT: This action is important for dual status officers. These are PHS officers that are assigned to Coast Guard. Users must be sure to select the correct Empl Record to avoid submitting a promotion request for an officer's Coast Guard employment row.



4. Click Add.

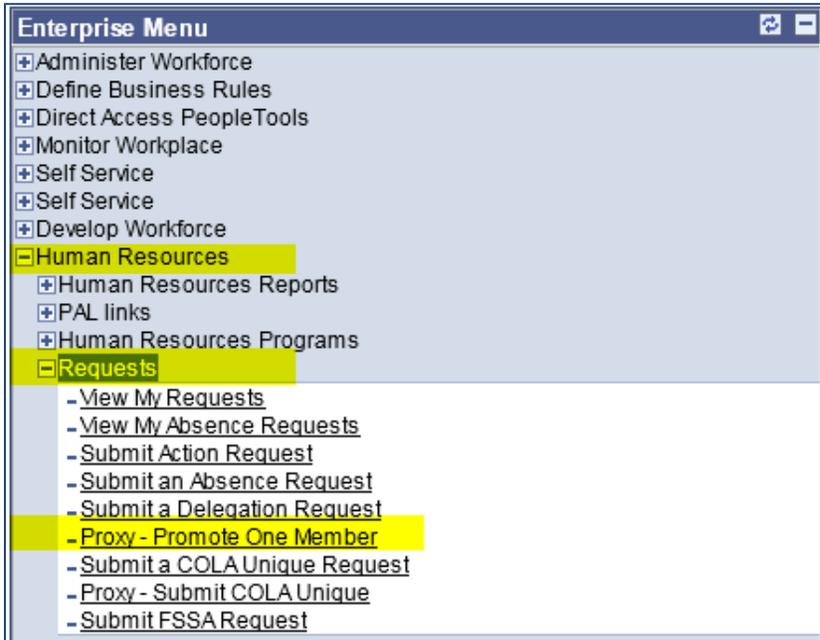
5. Enter the fields as described below. Click the Submit button to route the request for approval.

Field	Description/Instructions
Type	Advanced To
Sal Admin Plan	OFF
Job Code	New Temp Grade or Perm Grade Job Code the officer is being promoted into. NOTE: Users can reference Job Codes provided in section ' 11.1 PHS Job Codes '
Effective Date	Effective Date of the promotion
Date of Rank	New Date of Rank for temp grade promotions. This should ONLY be filled out for a temp grade promotion
Approver	Empl Id of the approver
Comments	Any comments about the request that you would like the approver to see

8.2 Reverse Promotion for One Officer

1. Navigate to Advance Promote One Member page via:

Enterprise Menu > Human Resources > Requests > Proxy – Promote One Member



2. Enter the Empl Id of the officer.
3. Click the Empl Rcd number field to select the correct PHS employment record.
IMPORTANT: This action is important for dual status officers. These are PHS officers that are assigned to Coast Guard. Users must be sure to select the correct Empl Record to avoid submitting a promotion request for an officer's Coast Guard employment row.



4. Click Add.

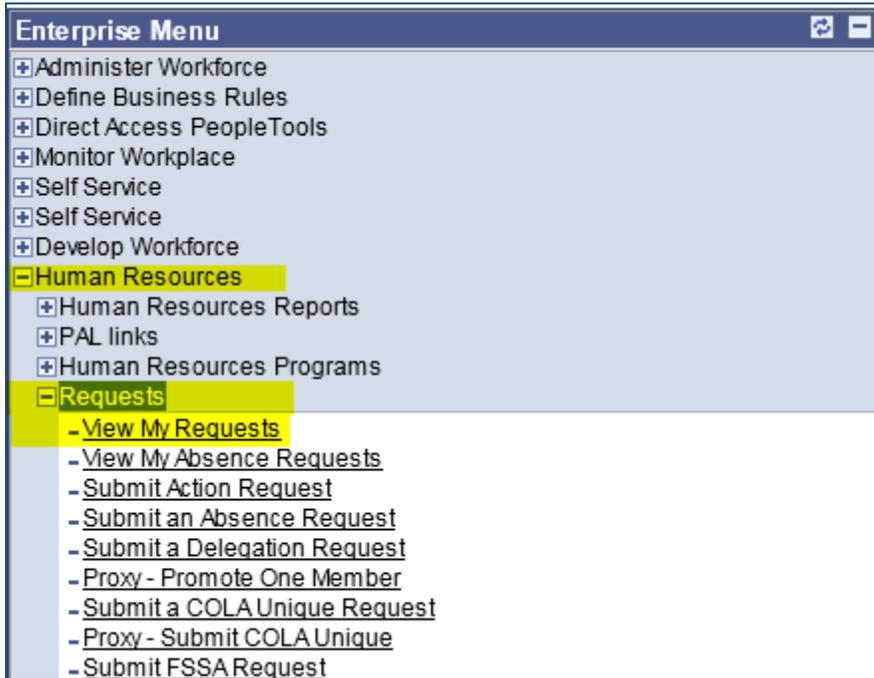
5. Enter the fields as described below. Click the Submit button to route the request for approval.

Field	Description/Instructions
Type	Reduced To
Sal Admin Plan	OFF
Job Code	New Temp Grade or Perm Grade Job Code the officer is being reduced to
Effective Date	Effective Date of the reversion
Date of Rank	N/A
Approver	Empl Id of the approver
Comments	Any comments about the request that you would like the approver to see

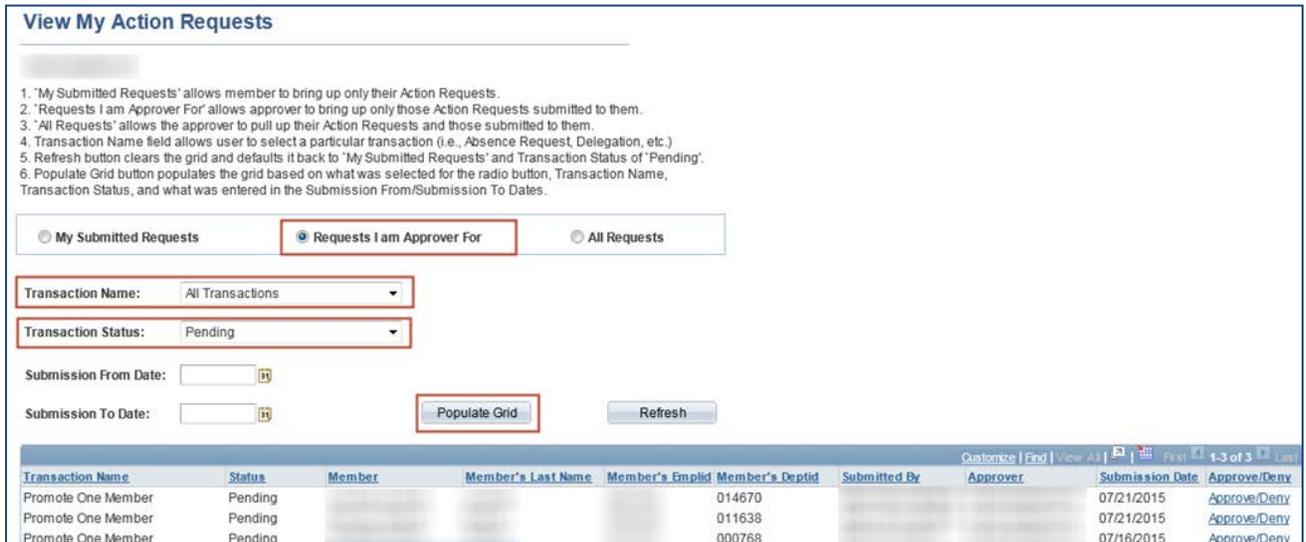
8.3 Approve Advance Promote Request

1. Navigate to the Requests page via:

Enterprise Menu > Human Resources > Requests > View My Requests



2. Click the 'Requests I Am Approver For' radio button and Populate Grid. Make sure the 'Transaction Status' is Pending to see all requests awaiting approval.



3. Select the Promote One Member transaction to approve and click the Approve/Deny link.

View My Action Requests

1. 'My Submitted Requests' allows member to bring up only their Action Requests.
 2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them.
 3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them.
 4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.)
 5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'.
 6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.

My Submitted Requests
 Requests I am Approver For
 All Requests

Transaction Name:

Transaction Status:

Submission From Date:

Submission To Date:

Transaction Name	Status	Member	Member's Last Name	Member's EmpId	Member's DeptId	Submitted By	Approver	Submission Date	Approve/Deny
Promote One Member	Pending			014670				07/21/2015	Approve/Deny
Promote One Member	Pending			011638				07/21/2015	Approve/Deny
Promote One Member	Pending			000768				07/16/2015	Approve/Deny

4. Click Approve or Deny.

Action Request

Promote/Advance Member

Request Details

Type: Advanced To Date of Rank:
 Salary Admin Plan: Expected Loss Date:
 Job Code: 000095 Uniform Allowance:
 Effdt: 07/20/2015 Officer Category:

Request Information

Overweight?: N
 Grade:

Request Approvers

Approver:

Comment:

Approve the One Member Action

Request Status: Pending [View/Hide Comments](#)

Approve Transaction

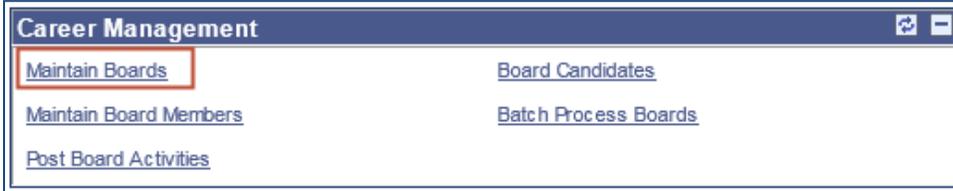
Comments

at 07/21/15 - 7:18 AM
 P GRADE PROMOTION FROM O3 TO O4.
 Current P Grade Job Code is 000096. New P Grade Job Code is 000095.
 Promotion Effective Date is 07/20/2015

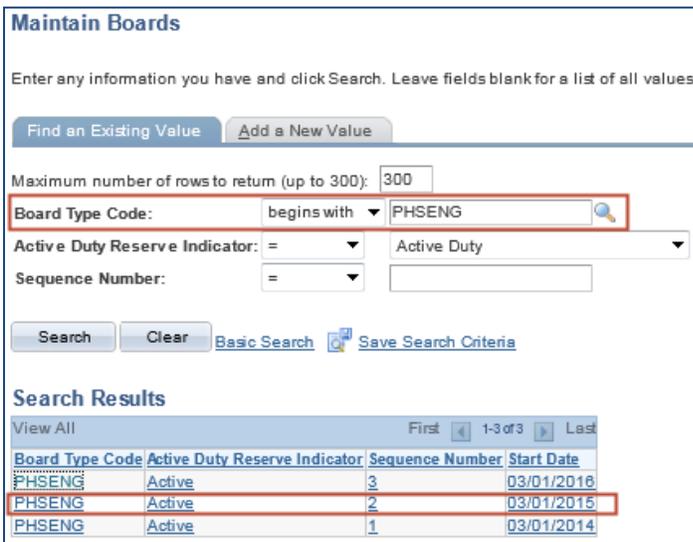
9 ADJOURN BOARDS

Authorized users must adjourn boards in order for board members data to be transferred to Person Profile. The PHS Eligible Boards Members report will be generated based on the board membership data saved in Person Profile.

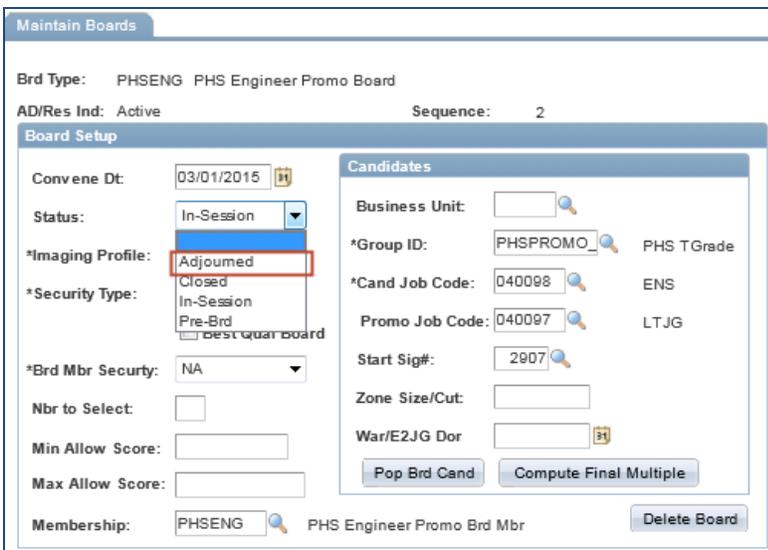
1. Click the [Maintain Boards](#) link in the Career Management pagelet.



2. Enter the Board Type Code and Sequence Number of the board you wish to adjourn. Click 'Search'.
3. Select the board to adjourn.



4. Change the Status from 'In-Session' to 'Adjourned'.



5. Save the page.

AD/Res Ind: Active Sequence: 2

Board Setup

Convene Dt: 03/01/2015

Status: Adjourned

*Imaging Profile: PROMO

*Security Type: PHS Promo

Best Qual Board

*Brd Mbr Securty: NA

Nbr to Select:

Min Allow Score:

Max Allow Score:

Membership: PHSENG PHS Engineer Promo Brd Mbr

Candidates

Business Unit:

*Group ID: PHSPROMO_ PHS TGrade

*Cand Job Code: 040098 ENS

Promo Job Code: 040097 LTJG

Start Sig#: 2907

Zone Size/Cut:

War/E2JG Dor:

Pop Brd Cand Compute Final Multiple

Delete Board

6. Repeat steps 1-5 for all boards that have board members setup in 'Maintain Board Members'.

Once the board is adjourned board members will received a board membership in Person Profile.

10 REPORTS

Five reports have been developed for the PHS Boards functionality in Direct Access. This section of the user guide outlines steps for running the reports.

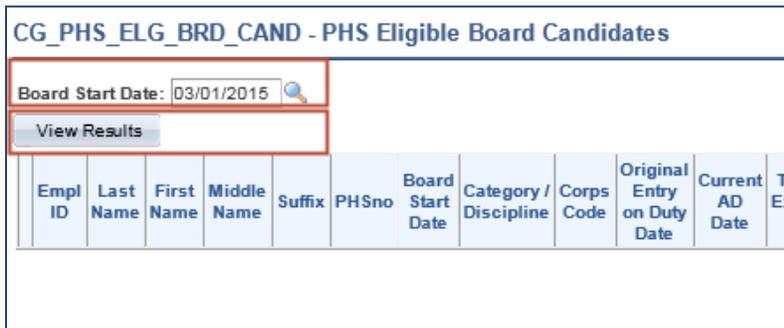
10.1 PHS Eligible Board Candidates

This report is a listing of all promotion eligible candidates with a Cand Status value of “Eligible” on a board.

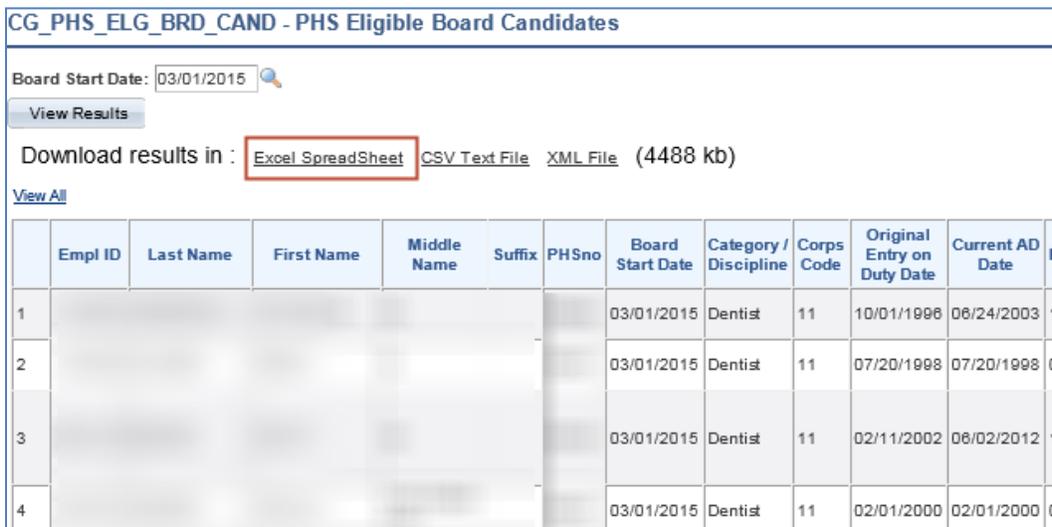
1. Click the [PHS Eligible Board Candidates](#) link in the Reports pagelet.



2. Enter the board Convene Date that you want to run the report for. Click View Results.



3. Click the download results in excel spreadsheet option to review the results in excel.



10.2 PHS Board Candidates with Separations

This report is a listing of all board candidates with a pending or approved separation request.

1. Click the [PHS Board Cand Separations](#) link in the Reports pagelet.



2. Enter the report parameters as listed below.

The screenshot shows the parameter form for the report. The 'Sep Date on or After' field is set to 07/01/2015 and the 'Sep Date on or Before' field is set to 08/30/2016. Both date fields are highlighted with a red box. The 'Board Type' field is empty. A 'View Results' button is also visible and highlighted with a red box.

Field	Description/Instructions
Sep Date on or After	Suggest using the first date of the promotion year i.e. 7/1/2015
Sep Date on or Before	Suggest using the last day of the promotion year i.e. 6/30/2016
Board Type	This can be left blank. Enter a PHS board type value to run the report for one board

3. Click View Results.
4. Click the download results in excel option to view the results in excel.

The screenshot shows the report results page. The 'Download results in' section is highlighted with a red box, showing 'Excel Spreadsheet' as the selected option. Below this, there is a 'View All' link and a table of results.

Empl ID	Name	Category	Job Code	Rank	Board Type	Board Start
1		HSO Genl	0H1795	LCDR	PHSEPP	03/01/2015
2		Medical	010094	CDR	PHSEPP	03/01/2015
3		Pharmacist	080094	CDR	PHSEPP	03/01/2015
4		Pharmacist	080095	LCDR	PHSEPP	03/01/2015

10.3 PHS Eligible Board Members

This report is a listing of all temp grade O6 PHS officers. The report will identify if the officers are eligible or not to be a board member based upon an existing board membership in Person Profile with an effective within the past 3 years.

1. Click the [PHS Eligible Board Members](#) link in the Reports pagelet.



2. Click the download to excel option to view the list of eligible board members in excel format.

CG_PHS_ELG_BRD_MEMS- PHS Eligible Board Members

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1467 kb)

View All First 1-100 of 2021 Last

	Name	Empl ID	Gender	Ethnicity	Job Code	Category / Discipline	Agency	Board Member	Board Membership	Board Year
1			Male	Ethnic Category - Not Hispanic or Latino	080093	Pharmacist	BOP	Y	PHS Pharmacy Promo Brd Mbr	2013
2			Male	White	080093	Pharmacist	BOP	Y	PHS Pharmacy Promo Brd Mbr	2013
3			Female		010093	Medical Officer	CDC			
4			Male		020093	Dentist	IHS			
5			Female	Black or African American	030093	Nurse	FDA			
6			Male	Black or African American	050793	PHS Public Health Scientist	CDC			
7			Male	Ethnic Category - Hispanic or Latino	040093	Engineer	EPA			

10.4 PHS Prior Service

This report is a listing of PHS officers with prior service data in Direct Access. The report will display prior Commissioned Corps, Military, and Civil Service in a From Date and To Date format. It will also report the constructed Commissioned Corps Date and Military Service Date.

1. Click the [PHS Prior Service](#) link in the Reports pagelet.



- Click the download to excel option to view the list of eligible board members in excel format.

CG_PHS_PRIOR_SERVICE- PHS Prior Service

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1115 kb)

View All First 1-100 of 3442 Last

	Name	Empl ID	Current AD Date	CC From Date	CC To Date	Commissioned Corps Date	MS From Date	MS To Date	Military Service Date	CS From Date	CS To Date
1			10/02/1995			10/02/1995	01/01/1910	05/18/1913	05/18/1992		
2			01/30/2014			01/30/2014	01/01/1910	07/07/1910	07/24/2013		
3			07/05/2013	01/01/1900	03/02/1900	05/04/2013	01/01/1910	10/01/1911	08/04/2011		
4			07/19/2010			07/19/2010	01/01/1910	05/11/1910	03/09/2010		
5			04/05/2013			04/05/2013			04/05/2013	01/01/1920	01/01/1925
6			12/25/2013			12/25/2013			12/25/2013	01/01/1920	01/01/1925
7			01/06/2012			01/06/2012	01/01/1910	01/01/1915	01/06/2007		
8			04/01/2005			04/01/2005	01/01/1910	07/10/1917	09/22/1997		
9			02/10/2012			02/10/2012			02/10/2012	01/01/1920	01/08/1924

10.5 Exceptional Proficiency Promo

This report is a listing of officers with EPP review history. The report displays officers' emplids and EPP grade reviewed.

- Click the [Exceptional Proficiency Promo](#) link in the Reports pagelet.

Reports

Exceptional Proficiency Promo	PHS Prior Service
Expiring Licenses	Officer Accomplishments
Requisition Data	Roster
Query: Sermo Lookup	PHS Detail to CG
Vacant Position Inquiry	Position Inquiry
Position Profile Data Inquiry	License Validation
PHS Eligible Board Members	PHS Eligible Board Candidates
PHS Board Cand Separations	

- Click the download to excel option to view the list of eligible board members in excel format.

CG_PHS_PROMO_EPP- Exceptional Promo Proficiency

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (13 kb)

View All

	ID	Elig T Grade
1		5
2		4
3		6
4		6
5		4
6		6
7		5

11 APPENDIX

11.1 PHS Job Codes

Officer Job Code assignment is very important in Direct Access promotion processing. PHS Direct Access job codes determine an officer’s temp grade and perm grade. Incorrect job code assignment will impact an officer’s promotion eligibility as well as salary grade assignment.

Users must be sure to assign officers the correct temp grade and perm grade job codes during promotion processing. The job codes will automatically be assigned during batch promotion processing that takes place via Post Board Activities.

PHS will be required to enter the correct temp grade and perm grade job code during one member promotion processing that takes place via Advance Promote One Member. Advance Promote One Member processing includes promoting one member via the “Advanced To” transaction type and reversing a promotion via the “Reduced To” transaction type.

11.1.1 PHS Temp Grade Job Codes

In Direct Access temp grade job codes are assigned according to the officer’s category and rank. Below is a list of values that will be assigned for temp grade promotions.

PHS DIRECT ACCESS JOB CODES (TEMP GRADE) BY CATEGORY												
JOB FAMILY	Grade/Rank Title DESCRIPTION	Pay	O10	O9	O8	O7	O6	O5 CDR	O4	O3 LT	O2	O1 ENS
			ADM	VADM	RADM	RADM	CAPT	Senior	LCDR	Sr. Asst	LTJG	Asst
			Surgeon General	Asst Surgeon General	Asst Surgeon General	RADM	Director		Full			
DENTAL												
DENT	Dental			020090	020091	020092	020093	020094	020095	020096	020097	020098
DIETITIAN												
DIET	Dietitian			090090	090091	090092	090093	090094	090095	090096	090097	090098
ENGINEER												
ENG	Engineer			040090	040091	040092	040093	040094	040095	040096	040097	040098
ENVIRONMENTAL HEALTH OFFICER												
EHO	Environmental Health Officer			060090	060091	060092	060093	060094	060095	060096	060097	060098
HEALTH SERVICES OFFICER												
HSOCH	Chemist			0H0190	0H0191	0H0192	0H0193	0H0194	0H0195	0H0196	0H0197	0H0198
HSODH	Dental Hygienist			0H0290	0H0291	0H0292	0H0293	0H0294	0H0295	0H0296	0H0297	0H0298
HSOEP1	Epidemiologist			0H1690	0H1691	0H1692	0H1693	0H1694	0H1695	0H1696	0H1697	0H1698
HSOGEN	HSO-General			0H1790	0H1791	0H1792	0H1793	0H1794	0H1795	0H1796	0H1797	0H1798
HSOHCA	Health Care Administrator			0H1590	0H1591	0H1592	0H1593	0H1594	0H1595	0H1596	0H1597	0H1598
HSOHSG	Human Scientist-Gerontologist			0H0590	0H0591	0H0592	0H0593	0H0594	0H0595	0H0596	0H0597	0H0598
HSOIT	Information Technologist			0H0690	0H0691	0H0692	0H0693	0H0694	0H0695	0H0696	0H0697	0H0698
HSOMB	Microbiologist			0H0890	0H0891	0H0892	0H0893	0H0894	0H0895	0H0896	0H0897	0H0898
HSOMPH	Masters in Public Health			0H1490	0H1491	0H1492	0H1493	0H1494	0H1495	0H1496	0H1497	0H1498
HSOMRA	Medical Records Admin			0H1290	0H1291	0H1292	0H1293	0H1294	0H1295	0H1296	0H1297	0H1298
HSOMT	Medical Technologist			0H0790	0H0791	0H0792	0H0793	0H0794	0H0795	0H0796	0H0797	0H0798
HSOOPT	Optometrist			0H0390	0H0391	0H0392	0H0393	0H0394	0H0395	0H0396	0H0397	0H0398
HSOPA	Physician Assistant			0H0490	0H0491	0H0492	0H0493	0H0494	0H0495	0H0496	0H0497	0H0498

PHS DIRECT ACCESS JOB CODES (TEMP GRADE) BY CATEGORY											
JOB FAMILY	Grade/Rank Pay Title DESCRIPTION	O10	O9	O8	O7	O6	O5	O4	O3	O2	O1
		ADM	VADM	RADM	RADM	CAPT	CDR	LCDR	LT	LTJG	ENS
		Surgeon General	Asst Surgeon General	Asst Surgeon General	RADM	Director	Senior	Full	Sr. Asst	Asst	Jr. Asst
HSOPHR	Pharmacologist		0H0990	0H0991	0H0992	0H0993	0H0994	0H0995	0H0996	0H0997	0H0998
HSOPOD	Podiatrist		0H1390	0H1391	0H1392	0H1393	0H1394	0H1395	0H1396	0H1397	0H1398
HSOPSY	Psychologist		0H1090	0H1091	0H1092	0H1093	0H1094	0H1095	0H1096	0H1097	0H1098
HSOSW	Social Worker		0H1190	0H1191	0H1192	0H1193	0H1194	0H1195	0H1196	0H1197	0H1198
MEDICAL											
MED	Surgeon	010089	010090	010091	010092	010093	010094	010095	010096	010097	010098
NURSE											
NURSE	Nurse Officer		030090	030091	030092	030093	030094	030095	030096	030097	030098
PHARMACIST											
PHARM	Pharmacist		080090	080091	080092	080093	080094	080095	080096	080097	080098
RESEARCH OFFICER GROUP											
ROGASS	ROG Associate		0R0190	0R0191	0R0192	0R0193	0R0194	0R0195	0R0196	0R0197	0R0198
ROGFEL	ROG Fellow		0R0290	0R0291	0R0292	0R0293	0R0294	0R0295	0R0296	0R0297	0R0298
ROGTEN	ROG Tenure		0R0490	0R0491	0R0492	0R0493	0R0494	0R0495	0R0496	0R0497	0R0498
ROGTTR	ROG Tenure Track		0R0390	0R0391	0R0392	0R0393	0R0394	0R0395	0R0396	0R0397	0R0398
SCIENTIST											
SCIBEH	Behavioral Scientist		050290	050291	050292	050293	050294	050295	050296	050297	050298
SCIBIO	Biological Scientist		050390	050391	050392	050393	050394	050395	050396	050397	050398
SCICHM	Chemical Scientist		050490	050491	050492	050493	050494	050495	050496	050497	050498
SCIENV	Environmental Health Scientist		050690	050691	050692	050693	050694	050695	050696	050697	050698
SCIEPI	Epidemiological Scientist		051090	051091	051092	051093	051094	051095	051096	051097	051098
SCIGEN	General Health Scientist		050190	050191	050192	050193	050194	050195	050196	050197	050198
SCIMTH	Mathematical Scientist		050990	050991	050992	050993	050994	050995	050996	050997	050998
SCINTR	Nutritional Scientist		050590	050591	050592	050593	050594	050595	050596	050597	050598
SCIPH	Public Health Scientist		050790	050791	050792	050793	050794	050795	050796	050797	050798
SCIPRM	Pharmacological Scientist		050890	050891	050892	050893	050894	050895	050896	050897	050898
THERAPIST											
THRAUD	Audiologist Therapist		0T0390	0T0391	0T0392	0T0393	0T0394	0T0395	0T0396	0T0397	0T0398
THROCC	Occupational Therapist		0T0290	0T0291	0T0292	0T0293	0T0294	0T0295	0T0296	0T0297	0T0298
THRPHY	Physical Therapist		0T0190	0T0191	0T0192	0T0193	0T0194	0T0195	0T0196	0T0197	0T0198
THRRES	Respiratory Therapist		0T0490	0T0491	0T0492	0T0493	0T0494	0T0495	0T0496	0T0497	0T0498
THRSLP	Speech Language Pathology Therapist		0T0590	0T0591	0T0592	0T0593	0T0594	0T0595	0T0596	0T0597	0T0598
VETERINARIAN											
VET	Veterinarian		070090	070091	070092	070093	070094	070095	070096	070097	070098

11.1.2 PHS Perm Grade Job Codes

In Direct Access perm grade job codes are assigned according to the officer's permanent rank. Below is a list of values that will be assigned for perm grade promotions.

PHS DIRECT ACCESS JOB CODES (PERM GRADE) BY RANK									
O10 ADM	O9 VADM	O8 RADM	O7 RADM	O6 CAPT	O5 CDR	O4 LCDR	O3 LT	O2 LTJG	O1 ENS
	000090	000091	000092	000093	000094	000095	000096	000097	000098