

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



Commissioned Corps Force Management (CCFM)

Integration

– Business Procedure Document – Core HR

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INTRODUCTION

PeopleSoft Employee Data

There are three main tables that make up an officer's Core Data record. These three tables must be populated for every officer in Direct Access.

Personal Data

- Describes an officer's personal information
- Some Personal Information has an effective date – name, address, marital status
- Some personal information is not expected to change – Birth Date, Ethnicity, SSN
- Personal Data information (with the exception of name) is closely controlled because it is Privacy Act related.
- Each officer has only one Personal Data record.

Job Data

- Job Data contains a historical record of an officer's assignment related information.
- Job Data is not privacy act related, and the information contained in Job is shared fairly widely.
- Job Data includes an officer's status (Active, Retired, or Terminated).
- Job Data includes an officer's Rank and Title.
- Job Data includes an officer's current Position, Department and Location.
- Job Data includes an officer's current Grade and Compensation.
- Effective Data and Effective Sequence.

NOTE: In Release 1, Direct Access will not have a history of an officer's assignments. It will only have information related to an officer's current assignments and other job rows that are necessary to make the system work efficiently.

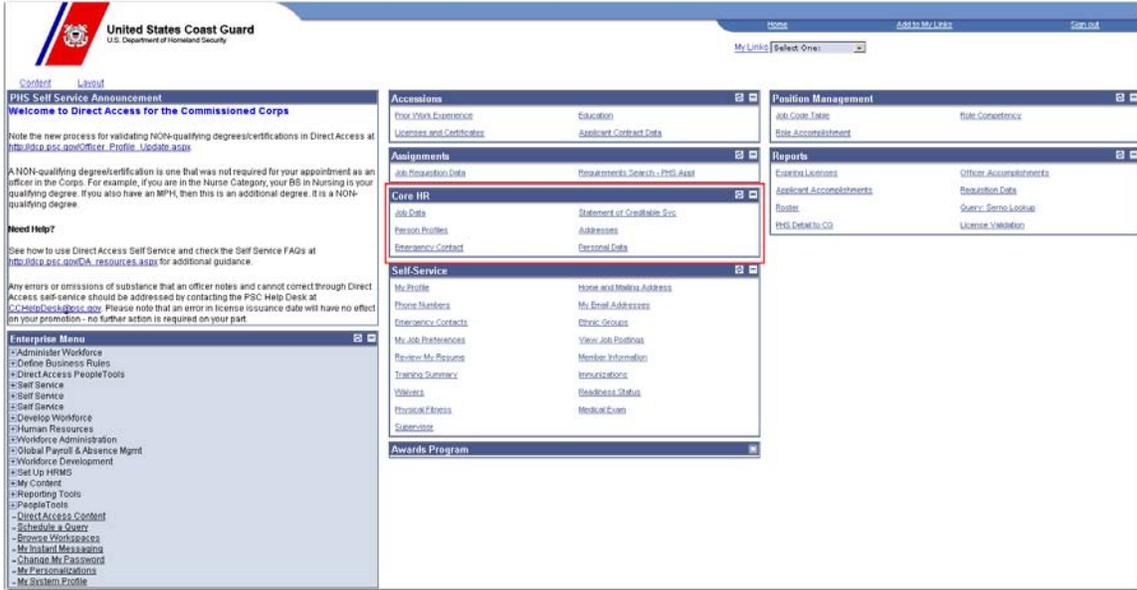
Employment Data

- Contains primarily Employment Dates related to an officer's employment.
- Employment Data has no History
- Employment Data has Employment Record Number as a Key, which allow

There are a number of other tables that also contain data related to an officer. The other tables are optional, and can be used or not used according to the needs of PHS. We will discuss the other tables as we come to them.

1 PORTAL

The Portal gives one click access to each Component. The links under Core HR will take you right to the Component name you are trying to access.



2 PERSONAL DATA – VIEW ONLY ACCESS

Personal Data describes an officer's personal information. Some Personal Information, such as Name and Address, has an effective date. Each officer only has one Personal Data record.

2.1 Personal Data – Name

From the Portal Homepage click inside the PHS Core HR box on the Personal Data hyperlink.

The screenshot displays the 'Personal Data' view for an employee with ID 5003796. The 'Name' tab is selected, showing the following information:

- Effective Date:** 04/02/2009
- Name:** Sam, Yosemite
- Format Using:** USA United States
- First Name:** Yosemite
- Middle:**
- Last Name:** Sam
- Suffix:**

Below the name information, the 'Benefits Information' section shows:

- Marital Status:** Unknown
- As of:** 04/02/2009
- USA** (indicated by a flag icon)

At the bottom of the form, there are navigation buttons: Save, Return to Search, Next in List, Previous in List, Previous tab, Next tab, Update/Display, and Include History. A breadcrumb trail at the very bottom reads: Name | Address | Personal Profile | Eligibility/Identity.

- The original **Personal Data Effective Date** is the date of hire. After the original entry, it is the date of the name change or address change.
- The **Name** is entered separately as First Name, Middle Name, Last Name and Suffix, and is then formatted in the special PeopleSoft name format in the Name field. The USA Format will be used for all PHS names.
- **Marital Status** will be set to the default value of 'Unknown'.

2.2 Personal Data – Address

[Name](#) | [Address](#) | [Personal Profile](#) | [Eligibility/Identity](#)

Sam, Yosemite Employee ID: 5003796

Personal Data View All First 1 of 1 Last

Effective Date: 04/02/2009

Home Address

Country:	USA	United States
Address 1:	114 Main Street	
Address 2:		
Address 3:		
City:	Disney	
County:		Postal: 20852
State:	MD	Maryland

[Mailing Address](#)

[Email](#) | [Phone](#)

[Name](#) | [Address](#) | [Personal Profile](#) | [Eligibility/Identity](#)

- **Home Address** is maintained via self-service.
- For a US address, at least Country, Address 1, City, State and Postal should be populated.
- For an address outside of the US, State and Postal are not used. Instead, this information should be placed on Address 2 or 3.
- The Mailing Address, Email and Phone hyperlinks provide access to the data entry area for those fields.

2.2.1 Personal Data – Address – Mailing Address

From the Personal Data – Addresses page, click on the Mailing Address hyperlink.

Mailing Address

Mailing Address

Country: USA United States

Address 1: 12053 Heather Down Drive

Address 2:

Address 3:

City: Disney

County: Postal: 20852

State: MD Maryland

OK Cancel

- Mailing Address is found under the Email hyperlink.
- Mailing Address is maintained via Self-Service.

2.2.2 Personal Data – Address – Mailing Address

From the Personal Data – Addresses page, click on the Email Address hyperlink.

Email Addresses

Sam,Yosemite Employee ID: 5003796

Email Addresses First ◀ 1-4 of 4 ▶ Last

Email Type	Email Address
Business	sam.yosemite@uscg.mil
Campus	campus@email.com
Home	ysam@gmail.com
Other	trainingdoc@lindsay.com

OK Cancel

- Email Addresses are found under the Email hyperlink. Multiple email addresses can be

entered.

- Email Type 'Business' will be used for Work Email Address.
- Email Type 'Home' will be used for Home Email Address.
- Other Email Addresses can also be entered (Campus, Dorm, Other).
- Email Addresses will be maintained via self-service.

2.2.3 Personal Data – Address – Phone

From the Personal Data – Addresses page, click on the Phone hyperlink.

Sam,Yosemite Employee ID: 5003796

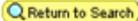
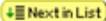
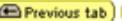
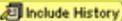
Phone First ◀ 1-4 of 4 ▶ Last

Phone Type	Contact # or Address
Business	444/555-6666
Cellular	305/555-2222
Home	555/666-7777
Home Fax	555/777-8888

OK Cancel

- Phone numbers are entered under the Phone hyperlink. Multiple Phone numbers can be entered.
- Phone Type '**Business**' will be used for Work Phone.
- Phone Type '**Home**' will be used for Home Phone.
- Phone Type '**Work Fax**' will be used for Work Fax number.
- Phone Type '**Home Fax**' will be used for Home Fax number.
- Phone Type '**Pager 1**' and '**Pager 2**' will be used for Pager.
- Phone Type '**Cellular**' will be used for Cell Phone.
- Phone Type '**Work Cell**' will be used for Work Cell Phone.
- Other Phone types can also be entered (Campus, Dormitory, Main, Other, Telex).

2.3 Personal Data – Personal Profile

Name	Address	Personal Profile	Eligibility/Identity
Sam, Yosemite		Employee	ID: 5003796
Gender:	Male	<input type="checkbox"/>	Full-Time Student
Alternate Employee ID:	12345	<input type="checkbox"/>	Waive Data Protection
Original Hire Date:	05/21/1998		
Highest Education Level:	A-Not Indicated		
Referral Source:	Unknown		
Employee Referral ID:			
Specific Referral Source:			
▶  USA			
 Save	 Return to Search	 Next in List	 Previous in List
	 Previous tab	 Next tab	 Update/Display
			 Include History
Name Address Personal Profile Eligibility/Identity			

- Gender can be Male, Female or Unknown.
- The PHS Serial Number will be entered in the **Alternate Emplid** field.
- **Full-Time Student** and **Waive Data Protection** will be left blank.
- **Original Hire Date** will hold the date that an officer first entered active duty in the PHS Commissioned Corps. This is also known as the Original Entry on Duty date.
- **Highest Education Level** will be set to A-Not indicated.
- **Date Entitled to Medicare** will not be used by PHS.
- **Referral Source** will be set to the default value of 'Unknown'.
- **Employee Referral ID** and **Specific Referral Source** will be left blank for PHS.

2.4 Personal Data – Eligibility / Identity

Name
Address
Personal Profile
Eligibility/Identity

Sam, Yosemite Employee ID: 5003796

Birthdate: 04/01/1962 **Birth Country:**

Age: Years 47 Months 0

Date of Death: **Birth Location:**

Language Code:

National ID				
Country	National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	333111001	<input checked="" type="checkbox"/>

USA

Ethnic Group: White

Military Status: Not indicated

Ethnic Category: **Eligible to Work in U.S.**

Employment Eligibility Proof	
1:	2:

Save
Return to Search
Next in List
Previous in List
Previous tab
Next tab
Update/Display
Include History

[Name](#) | [Address](#) | [Personal Profile](#) | [Eligibility/Identity](#)

- Birth Date** will contain the date of Birth.
- Date of Death** will contain an officer's date of death, if appropriate.
- Birth Country, Birth State and Birth Location** will be maintained going forward for offices hired through eCAD.
- Language Code** will be left blank.
- National ID** will contain the US Social Security Number.
- Country** will be 'USA', **National ID Type** will be 'PR – payroll' and **Primary ID** will always be checked 'yes'.
- Ethnic Group** will contain information about an officer's ethnicity. The Coast Guard uses a much larger set of values than those currently used by PHS, which includes all of the various possible combinations of ethnicity in addition to the traditional values.
- Eligible to Work in the United States** will be checked 'yes' for all officers.
- Eligibility Proof 1 and 2** will be left blank.

3 JOB DATA – VIEW ONLY ACCESS

Job Data tracks an officer's Employee Status, Position, Rank, Employee Classification, Grade and Base Compensation. It is maintained via an inbound interface from COPS. In Release 1, the work history will include only the current job row and other rows necessary to make the system work efficiently.

3.1 Job Data – Work Location

From the Portal Homepage click inside the PHS Core HR box on the Job Data hyperlink.

The screenshot displays the 'Work Location' section of the system. At the top, there are navigation tabs: 'Work Location', 'CG Job', 'Job Information', 'Salary Plan', and 'CG Employment'. Below the tabs, the user's name 'Sam, Yosemite' and employee details 'Employee ID: 5003796' and 'Empl Rcd#: 0' are shown. The 'Work Location' section is highlighted in blue and contains the following data:

- Employee Status:** Active
- Effective Date:** 02/27/2008
- Action / Reason:** Transfer
- Date Created:** 02/23/2008
- Effective Sequence:** 0
- Job Indicator:** Primary Job
- Position Number:** 00100584
- Regulatory Region:** USA
- Company:** PHS
- Business Unit:** PHS
- Department:** 064382
- Location:** MD0445
- Supervisor ID:**

Below the data, there are links for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. At the bottom, there are navigation buttons: 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Previous tab', 'Next tab', 'Update/Display', and 'Include History'. A breadcrumb trail at the bottom reads: 'Work Location | CG Job | Job Information | Salary Plan | CG Employment'.

- **Empl Rcd # or Employee Record Number** allows an officer to have different types of Job record. A PHS officer deployed to the Coast Guard will have a separate Job Record and Empl Rcd# for their Coast Guard service.
- **Employee Status** is automatically set by the system based on the action and action reason code that is set. Employee Statuses include Active, Terminated, Retired, and Deceased.
- **Date Created** indicates the date that a job row was first entered into the system.
- **Effective Date** indicates the date that the change on the job row actually takes effect.
- **Effective Sequence** is used if there is more than one change on a given effective date.
- **Job Indicator** will be 'Primary Job' for all assignment job rows.
- **Action and Action Reason** describe the nature of the change on a job row. The Action code gives the general nature of the change – Hire, Transfer, Promotion, Pay Rate Change, Termination, Retirement, etc. and the Action Reason Code gives the specific nature of the change.
- **Position Number** links the officer to a position. Once a position number is selected, the

position description displays. Only the current job row will have a position number. The hire row will not have this field populated.

- **Position Entry Date** is the date that the officer first entered their current position.
- **Regulatory Region** is used to indicate which rules should be applied for regulatory reporting. It will be set to 'USA'.
- **Company** is used to combine groups into reporting entities for payroll purposes. It will be set to 'PHS'.
- **Business Unit** is used to separate the members in the database so that special security, foundation tables and processing rules can be applied to a given group. It will be set to 'PHS'.
- **Department** is used to track an officer's organization or administrative code.
- **Department Entry Date** is the date that the officer first entered into his or her current department.
- **Location** will be used to track an officer's geographic location. This is indicated by a city and state.
- **Supervisor** will be left blank for PHS.
- **The Employment Data, Job Earnings Distribution and Employment** hyperlinks at the bottom of this page access pages that PHS users do not use and do not have security access to. They are not used.

3.2 Job Data – CG Job

From the Portal Homepage click inside the PHS Core HR box on the Job Data hyperlink.

The screenshot shows a web interface for job data. At the top, there are tabs for 'Work Location', 'CG Job', 'Job Information', 'Salary Plan', and 'CG Employment'. Below the tabs, the user's name 'Sam, Yosemite' and employee ID '5003796' are displayed. The 'Empl Rcd#' is 0. A navigation bar includes 'View All', 'First', '1 of 1', and 'Last'. The main content area displays the following information:

Effective Date:	02/27/2008	Current	Effective Sequence:	0
Permanent Job Code:	080095	LCDR Pharmacist		
Position Description:	TRANSFORMATION OFFICER-CC INFO SYSTEMS P			

At the bottom, there are several buttons: 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Previous tab', 'Next tab', 'Update/Display', and 'Include History'. Below the buttons are hyperlinks for 'Work Location', 'CG Job', 'Job Information', 'Salary Plan', and 'CG Employment'.

- **Permanent Job Code** will be used to store the job code associated with an officer's permanent grade.
- **Position Description** will be used for historic position title. Only the current job rows will contain a position number. Historic job rows (those rows happening before the date of conversion), will not have a position number, and therefore will not have the associated position title. In order to preserve the historic position title, it will be converted into this custom position description field.

3.3 Job Data – Job Information

From the Portal Homepage click inside the PHS Core HR box on the Job Data hyperlink.

Work Location	CG Job	Job Information	Salary Plan	CG Employment
Sam, Yosemite	Employee	ID: 5003796	Empl Rcd#: 0	
Job Information				View All First 1 of 1 Last
Effective Date:	02/27/2008	Effective Sequence:	0	Job Indicator: Primary Job
Action / Reason:	Transfer	Permanent Change of Station		Current
Job Code:	080094 CDR Pharmacist	Entry Date:	02/27/2008	
Regular/Temporary:	Regular	Full/Part:	Full-Time	
Empl Class:	Regular	Officer Code:	None	
Regular Shift:	N/A	Shift Rate:	/	
Standard Hours:	40.00	FTE:	1.00	
Work Period:	W Weekly			
Contract Number:	Next Contract Number	Contract Type:		
▶ USA				
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation	

- **Job Code** will be an intelligent key that will reflect an officer's category, discipline and rank.
- The **Job Code Description**, which displays next to the jobcode, will reflect an officer's military rank, Category and Discipline.
- **Job Code Entry Date** is the date that an officer first entered into a Job Code.
- **Regular / Temporary** will reflect whether or not an officer has been assimilated. 'Regular' will be used for assimilated officers, and 'Reserve' will be used for officers that have not been assimilated.
- **Employee Class** will reflect the type of officer. The employee classes are:
 - Retired – Recalled (PHS RetRec)
 - JR Costep (PHS JRCostp)
 - SR Costep (PHS JRCostp)
 - Short Tour (PHS Short)
 - Selected Reserve (SELRES)
 - Regular
 - Inactive Ready Reserve (IRR)

Several fields will not be used by PHS and will be left blank or left at the default value.

- **Full/Part Time** will default to 'Full Time'.
- **Officer Code** is used to identify corporate officers. It will default to 'None'.
- **Regular Shift** will default to 'N/A'.
- **Shift Rate** will be left blank.
- **Standard Hours** will default to '40'.
- **FTE** will default to '1.0'.

- **Work Period** will default to 'Weekly'.
- **Contract Number** will be left blank.
- **FLSA Status, EEO Class and Work Day Hours** will not be used.

3.4 Job Data – Salary Plan

From the Portal Homepage click inside the PHS Core HR box on the Job Data hyperlink.

The screenshot displays the following information:

- Navigation:** Work Location, CG Job, Job Information, **Salary Plan**, CG Employment
- Employee Info:** Sam, Yosemite; Employee ID: 5003796; Empl Rcd#: 0
- Salary Plan Summary:**
 - Effective Date: 02/27/2008
 - Effective Sequence: 0
 - Job Indicator: Primary Job
 - Action / Reason: Transfer
 - Permanent Change of Station
 - Current
- Salary Administration:** OFF
- Grade:** 05
- Grade Entry Date:** 02/27/2008
- Step:** (blank)
- Step Entry Date:** (blank)
- Review Rating:** (blank)
- Review Date:** (blank)
- Rating Scale:** (blank)
- Rating Model:** (blank)
- Matrix:** (blank)

Navigation links at the bottom: Job Data, [Employment Data](#), [Earnings Distribution](#), [Benefits Program Participation](#)

- The Salary Plan page contains information about an officer's salary plan and current grade.
- PHS and the Coast Guard will share a **Salary Administration Plan**. Since all PHS members are Officers, PHS will use the 'OFF' Salary Administration Plan. Officers who have prior enlisted experience will use the 'OFE' Salary Administration Plan for grades O1 to O3.
- **Grade** will be used to reflect an officer's temporary grade.
- **Grade Entry Date** will be used to reflect the date that the officer entered into his or her temporary grade.
- Since the Coast Guard has chosen not to display the actual salary associated with the grade in the system, **Step** and **Step Entry Date** are not used at this time.
- The **Rating Scale, Review Rating, Review Date, Rating Model and Matrix** will not be used.

4 EMPLOYMENT DATA –VIEW ONLY ACCESS

4.1 Employment Data – CG Employment

From the Portal Homepage click inside the PHS Core HR box on the Job Data hyperlink.

Sam, Yosemite Employee ID: 5003796 Empl Rcd#: 0

Expected Loss Date: Active Duty Base Date: 05/21/1998

Rotation Eligibility Date: Seniority Credit Date: 07/01/2000

Anniversary Date: Training & Experience Date: 07/01/1990

Total Qualifying Service: Yr/Mo/Dy Creditable Service Date:

Total IDT Points: Promotion Credit Date: 07/01/1997

AD Base Counter: Date Entered Curr Active Duty: 05/21/1998

Current FYTD Paid Drills:

Total Points:

High 36 Avg Mos:

Save Return to Search Next in List Previous in List Previous tab Next tab Update/Display Include History

[Work Location](#) | [CG Job](#) | [Job Information](#) | [Salary Plan](#) | [CG Employment](#)

- The **Active Duty Base Date** is a constructed date. It is the primary date that is used for determining eligibility for retirement. PHS will use this as the Retirement Credit Date.
- The **Seniority Credit Date** is the starting date for permanent grade and established eligibility of both Regular Corps and Reserve Corps officers to be considered for permanent promotion to the Senior (Commander, O-5) grade for the restricted categories and the Director (Captain, O-6) grade for all categories as follows:
 - For the Regular Corps – Reflects the later of two dates, either the permanent grade credit date established at the time of appointment in the Regular Corps or the date of the most recent permanent grade promotion that took place following appointment in the Regular Corps.
 - For the Reserve Corps – Reflects the later of two dates, either the date the officer was appointed in the Reserve Corps or the date of the most recent permanent grade promotion that took place following appointment in the Reserve Corps.
- The **Training and Experience Date** is the date constructed to reflect the total professionally qualifying collegiate education, postgraduate training, and work experience (established in the applicable appointment standard) as determined by that category’s appointment board for each officer in that category determined upon call to extended active duty or appointment to that category. It also reflects limitations in the amount of time to be credited as set forth in the applicable appointment standards. This date is a key element in determining eligibility to be considered for promotion (other than through the exceptional capability process) as follows:

- Temporary promotion in the Regular Corps and Reserve Corps through Director (Captain, O-6) grade.
- Permanent promotion in the Reserve Corps only for ALL categories though Full (Lieutenant Commander, O-4) grade and to the Senior (Commander, O-5) grade for non-restricted categories.
- The **Creditable Service Date** is a date adjusted to reflect the active duty time after an officer receives their qualifying degree. Medical and Dental officers also receive credit for residencies outside of active duty.
- **Promotion Credit Date** pertains to Regular Corps officers ONLY. This date is only significant in establishing eligibility of a Regular Corps officer for permanent promotions to: Senior Assistant (Lieutenant, O-3) & full (Lieutenant Commander, O-4) grades Senior (Commander, O-5) grade for the non-restricted categories

Several of the dates on this page will not be used by PHS.

- Expected Loss Date
- Rotation Eligibility Date

Several fields on this page are used only for reservists. PHS will not be using these fields:

- Anniversary Date
- Total Qualifying Service
- Total IDT Points
- Current FYTD Paid Drills
- Total Points
- High 36 Avg Mos

5 STATEMENT OF CREDITABLE SERVICE – VIEW ONLY ACCESS

5.1 Statement of Creditable Service

From the Portal Homepage click inside the PHS Core HR box on the Statement of Creditable Service hyperlink.

Statement of Creditable Svc

Sam, Yosemite Employee ID: 5003796 Empl Rcd#: 0

SOCS Date:	Pay Entry Base Date:	05/21/1998
Effective Date	Active Duty	05/21/1998
Pay Allowances:	Base Date:	
Military Obligation		
Military Entry Date:	Anniversary Date:	
Date Entered Current AD: 05/21/1998	Expected	
	Loss Date:	
Date Completed Military	Expected Active	
Obligation:	Duty Term Date:	

- The **Military Entry Date**, also known as the DIEMS date is the date a member was first enlisted, commissioned, appointed or inducted into a regular or reserve component of any Uniformed Service.
- The **Date Entered Current AD**, also known as the Latest Entry on Duty date is the date that the officer was most recently ordered to active duty. This date is set during the Accessions process.
- The **Pay Entry Base Date** is the constructive date of entry for pay purposes (including active and inactive duty). For members in a continuous military status, this date will be the same as the date enlisted or accepted an appointment, unless there is prior service, break in service or deductible time. The date is used for determining longevity pay increases. Adjustments must be made in accordance with HRSICINST M1000.2A, Personnel and Pay Procedures Manual.
- The **Active Duty Base Date** is a constructed date. It is the primary date that is used for determining eligibility for retirement. PHS will use this as the Retirement Credit Date.

Several Dates on this page will not be used by PHS:

- SOCS Date
- Effective Date Pay Allowances
- Date Completed Military Obligation
- Anniversary Date
- Expected Loss Date
- Expected Active Duty Term Date

6 ADDRESSES – VIEW ONLY ACCESS

From the Portal Homepage click inside the PHS Core HR box on the Addresses hyperlink.

Address History

Sam, Yosemite Employee ID: 5003796

Address Type View All First 1 of 3 Last

Address Type: Business

Address History View All First 1 of 1 Last

Effective Date: 04/09/2009 **Status:** Active

Country: USA United States

Address 1: TOWER BLDG/SUITE 100/PLAZA LEVEL

Address 2: 1101 WOOTON PARKWAY

Address 3: ROCKVILLE

City: ROCKVILLE

County: Maryland **Postal:** 20852

State: MD Maryland

Save Return to Search Next in List Previous in List Update/Display Include History

- Work Address can be viewed on the Addresses tab. The Address type will be Business.
- Work Address will be maintained via an inbound interface from COPS
- Home Address and Mailing Address can also be viewed in this component.

7 EMERGENCY CONTACT – VIEW ONLY ACCESS

Emergency Contact is used to track friends and or family members of an officer that should be contacted in case of an emergency.

1. From the Portal Homepage, click on the [Emergency Contacts](#) link located in the Core HR pagelet.



2. Enter the Search Criteria of the officer you would like to view and click on "Search".
3. Emergency Contacts are entered and maintained by officers via self-service.

The screenshot shows the 'Emergency Contact' form for a person with ID 000000. The form includes the following fields and values:

- Contact Name:** Jane Smith
- Primary Contact:**
- Relationship to Employee:** Sister
- Same Address as Employee:**
- Same Phone as Employee:**
- Contact Address:**
 - Country:** USA United States
 - Address:** 1234 PHS WAY, PHS MD 12345
- Contact Phone:**
 - Phone:** 301/123-4567

Field	Description
Contact Name	Name of the Emergency Contact
Relationship to Employee	Indicates the relationship between the contact and the officer.
Primary Contact	Used to mark the person who should be contacted first in case of an emergency
Same Address as Employee	Checked if the emergency contact lives with the officer
Same Phone as Employee	Checked if the emergency contact has the same phone number as the officer

- Click on the "Other Phone Numbers" tab to view any additional phone numbers the officer has listed for each emergency contact.

Person ID: [REDACTED]

Emergency Contact Find | View All First 1 of 1 Last

Contact Name: Jane Smith
Relationship to Employee: Sister Primary Contact

Other Phone Numbers for Emergency Contact Find | View All First 1-2 of 2 Last

Phone Type:	Mobile	Phone:	123/456-7890
	Home		301/123-1234

Multiple phone numbers can be tracked for each emergency contact.

8 PERSON PROFILE

8.1 Locating an Officer

Start Internet Explorer, sign into Direct Access, and follow these steps.

- From the Portal Homepage, click on the Person Profiles link located in the Core HR pagelet.

Core HR

[Job Data](#) [Statement of Creditable Svc](#)

[Person Profiles](#) [Addresses](#)

[Emergency Contact](#) [Personal Data](#)

- Use the Search record to pull up the officer's Person Profile using the officer's EMPLID or name

Person Profiles

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

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

Empl ID: begins with

Profile Type: begins with

Name: begins with

Last Name: begins with

Alternate Character Name: begins with

Include History Correct History Case Sensitive

[Basic Search](#)

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



Note: If an officer has both a Person Profile and an Awards Coordinator Profile, then that member is a PHS officer who is or has been assigned to the Coast Guard for duty. Use the "PERSON" profile to record the data.

8.2 Honors and Awards – View Only Access

Individual PHS officer honors and awards that have been approved are maintained in the Person Profile of Direct Access. Honors and Awards will be used to track information related to an officer's Lower-Level Honor Awards, Service Awards, Badges/Metals, and Non-PHS Awards. The information is available to PHS officers in 'My Current Profile'. This section provides the procedure for viewing Honors and Awards via Person Profile.

Start Internet Explorer, sign into Direct Access, and follow these steps to view Honors and Awards.

Follow steps to [Search for an Officer](#)

1. Click on the Qualifications link. Scroll down to see the Honors and Awards content section

A screenshot of the 'Person Profile' form in a web application. The form has a white background and a blue header. The header contains the text 'Person Profile' in blue. Below the header, there are several fields: 'Empl ID:' with a blurred value and a 'GET INFORMATION' link; 'Profile Type:' with 'PERSON' and 'Person'; '*Profile Status:' with a dropdown menu showing 'Active'; '*Description:' with a text input field containing a blurred value; and 'Profile Actions:' with a dropdown menu showing '<Select Action>' and three icons (a right arrow, an information icon, and a printer icon). Below these fields, there are two rows of links: 'Competencies', 'Qualifications', and 'Education'. The 'Qualifications' link in the first row is highlighted with a red rectangular box. At the bottom of the form, there is a 'Save' button.

- Click on the Award/Certification to view the record

Person Profile

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

*Profile Status: Active

*Description: [REDACTED]

Profile Actions: <Select Action> [Info] [Print]

[Competencies](#) Qualifications [Education](#)

▼ Honors and Awards (Approval Not Required) Customize | Find | View All | First 1-5 of 17 Last

ID	Honor and Award	View History
CG135	PHS Outstanding Service Medal ←	
CG170	PHS Commendation Medal	
CG185	PHS Achievement Medal	
CG2530	PHS Special Assignment Award	
CG2555	PHS Recruitment Service Ribbon	

▶ Licenses & Certifications (Approval Not Required)

▶ Administrative Flags (Approval Not Required)

[Competencies](#) Qualifications [Education](#)

Save

- View the fields as indicated below.

NOTE: The citation of the award will not be entered into this page. The award itself will be scanned into an officer's eOPF and the citation can be read there.

Person Profile

View Honors and Awards

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

This page displays the item details. You are not authorized to update this Content Item.

Details Find | View All First 1 of 1 Last

Issue Date:	06/24/2006	
Honor and Award:	CG135	PHS Outstanding Service Medal
Status:	Active	
From Date:	02/01/2005	
To Date:	02/01/2006	
Grantor:	PHS	

Field	Description/Instructions
Issue Date	Indicates the date the honor or award was issued.
Honor and Award	Indicates the type of honor or award issued. The system will hold multiple awards of the same type, but only one per Issue Date.
Status	Indicates an officer's status.
From Date	The begin date of the period of performance for which the officer/unit was nominated.
To Date	The end date of the period of performance for which the officer/unit was nominated.
Grantor	Indicates the service or organization that granted the award.

- Click **OK** to return to Person Profile page

Person Profile

View Honors and Awards

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

This page displays the item details. You are not authorized to update this Content Item.

Details		Find New All First 1 of 1 Last
Issue Date:	06/24/2006	
Honor and Award:	CG-135	PHS Outstanding Service Medal
Status:	Active	
From Date:	02/01/2005	
To Date:	02/01/2006	
Grantor:	PHS	

OK

8.3 License & Certifications – View Only Access

Individual PHS officer license and certification information is maintained in the Person Profile of Direct Access. Licenses and Certifications will be used to track information related to an officer's licensures, registrations, certifications, Board certifications as well as an officer's National Provider Identifier Number and Drug Enforcement Administration Number. This section provides the procedure for viewing Licenses & Certifications via Person Profile.

Start Internet Explorer, sign into Direct Access, and follow these steps to view License and Certifications.

Follow steps to [Search for an Officer](#)

1. Click on the Qualifications link. Scroll down to see the License & Certifications content section

The screenshot displays the 'Person Profile' interface. At the top, there are fields for 'Empl ID', 'Profile Type' (set to PERSON), '*Profile Status' (set to Active), and '*Description'. Below these is a 'Profile Actions' dropdown menu. A navigation bar contains three links: 'Competencies', 'Qualifications' (highlighted with a red box), and 'Education'. A 'Save' button is located at the bottom left of the profile area.

A list of the officer's current licenses/certifications will be displayed in the Licenses & Certifications content section.

2. Click on the License/Certification to view the record

Person Profile

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

*Profile Status: Active

*Description: [REDACTED]

Profile Actions: <Select Action>

[Competencies](#) [Qualifications](#) [Education](#)

▶ Honors and Awards (Approval Not Required)

▼ Licenses & Certifications (Approval Not Required) [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

ID	License	Qualifying	Expiration Date
NRSRN	Nursing	<input checked="" type="checkbox"/>	12/31/2012

▶ Administrative Flags (Approval Not Required)

[Competencies](#) [Qualifications](#) [Education](#)

3. View the fields as indicated below

Person Profile

View Licenses & Certifications

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

This page displays the item details. You are not authorized to update this Content Item.

Details [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

Issue Date: 08/27/1992

License: NRSRN Nursing

Status: Active

Country: USA United States

State: ND North Dakota

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date: 12/31/2012

Qualifying

License/Certification Number: R25074

Issued By: ND BOARD OF NURSING

Field	Description/Instructions
Issue Date	Indicates the date the license was issued.
License	Indicates the type of license issued. The system will hold multiple licenses of the same type, but only one per Issue Date.
Status	Indicates an officer's status.
Country	Indicates the country that the license was issued in.
State	Indicates the state that the license was issued in.
Type of Restriction	Indicates the type of restriction for the license. The default value is N-None.
Renewal in Progress	N/A
License Verified	N/A
Expiration Date	Indicates the date the License or Certification expires.
Qualifying	Indicates whether or not the license was used to qualify the officer for his or her commission.
License/Certification Number	Indicates the License Number given by the issuing authority.
Issued By	Indicates the license/certification authorizing authority.

- Click **OK** to return to Person Profile page

Person Profile

View Licenses & Certifications

Empl ID: [REDACTED] [REDACTED]

Profile Type: PERSON Person

This page displays the item details. You are not authorized to update this Content Item.

Details Find | View All First 1 of 1 Last

Issue Date: 08/27/1992 i

License: NRSRN Nursing

Status: Active

Country: USA United States

State: ND North Dakota

Type of Restriction: 0-None

Renewal In Progress

License Verified

Expiration Date: 12/31/2012

Qualifying

License/Certification Number: R25074

Issued By: ND BOARD OF NURSING

OK

8.4 Administrative Flags – View Only Access

Administrative flags are flags that can be set by different departments in PHS to indicate that there is something special about an officer that may impact an assignment. When the CAM sees a member flag, he or she goes to the department which set the flag to get additional information. Administrative flags will be maintained via an inbound interface from COPS to DA.

Start Internet Explorer, sign into Direct Access, and follow these steps to view Administrative Flags.

Follow steps to [Search for an Officer](#)

1. Click on the Qualifications link. Scroll down to see the Administrative Flags section

The screenshot shows the 'Person Profile' page. At the top, there are fields for 'Empl ID', 'Profile Type' (PERSON), '*Profile Status' (Active), and '*Description'. Below these is a 'Profile Actions' dropdown menu. A navigation bar contains links for 'Competencies', 'Qualifications', and 'Education'. The 'Qualifications' link is highlighted with a red rectangular box. A 'Save' button is located at the bottom left.

2. Click on the Administrative Flag name to view the record

The screenshot shows the 'Person Profile' page with the 'Administrative Flags' section expanded. The section title is 'Administrative Flags (Approval Not Required)'. Below the title is a table with columns: ID, Administrative Flag, Begin Date, and End Date. A red arrow points to the 'License Limited Tour' flag in the 'Administrative Flag' column.

ID	Administrative Flag	Begin Date	End Date
LLT	License Limited Tour	01/02/2012	01/02/2014

Navigation links: Competencies, Qualifications, Education. A 'Save' button is at the bottom left.

3. View the fields as indicated below

The screenshot shows a web interface for 'Person Profile' with a sub-section 'View Administrative Flags'. It displays fields for 'Empl ID', 'Profile Type' (PERSON), and a message: 'This page displays the item details. You are not authorized to update this Content Item.' Below is a 'Details' table with the following data:

Details		Find View All First 1 of 1 Last
Effective Date:	01/02/2012	
Administrative Flag:	LLT	License Limited Tour
Begin Date:	01/02/2012	
End Date:	01/02/2014	

Field	Description/Instructions
Effective Date	Indicates the date the Administrative Flag was effective
Administrative Flag	Indicates the Administrative Flag
Begin Date	Indicates the Begin Date for the Administrative Flag
End Date	Indicates the End Date for the Administrative Flag

4. Click OK to return to Person Profile page

This screenshot is identical to the previous one, showing the 'View Administrative Flags' details. The 'OK' button at the bottom left of the interface is highlighted with a red rectangular box.

8.5 Education – View Only Access

Education will be used to track information related to an officer's university education as well as their internships, residencies and fellowships.

Start Internet Explorer, sign into Direct Access, and follow these steps to view Education.

Follow steps to [Search for an Officer](#)

1. Click on the Education link to see the Degrees content section



The screenshot shows the 'Person Profile' page. At the top, there are fields for 'Empl ID:', 'Profile Type: PERSON Person', '*Profile Status: Active', and '*Description:'. Below these is a 'Profile Actions:' dropdown menu. A navigation bar contains three links: 'Competencies', 'Qualifications', and 'Education'. The 'Education' link is highlighted with a red rectangular box. A 'Save' button is located at the bottom left of the page.

2. Click on the Degree to view the record



The screenshot shows the 'Person Profile' page with the 'Education' link selected. Below the navigation bar, a table titled 'Degrees (Approval Not Required)' is displayed. The table has columns for 'ID', 'Degree', 'Major Code', and 'Qualifying'. A red arrow points to the 'Bachelors Degree' link in the 'Degree' column of the first row. The 'Major Code' for this record is 'NURSE-STRAIGHT GENERAL DUTY'. A 'Save' button is located at the bottom left of the page.

ID	Degree	Major Code	Qualifying
B	Bachelors Degree	NURSE-STRAIGHT GENERAL DUTY	<input checked="" type="checkbox"/>

3. View the fields as indicated below

Field	Description
Date Acquired	Indicates the date the degree was granted.
Degree	Indicates the type of degree earned. The system will hold multiple degrees of the same type, but only one per Date Acquired.
Major Code	The code and major associated with the degree.
Status	Indicates an officer's status.
Country	Indicates the country that the degree was earned in.
State	Indicates the state for the school where the degree was earned.
School Code	Indicates the code and school where the degree was earned.
Minor Code	If applicable, indicates the code and minor associated with the degree.
Average Grade	Indicates the grade point average.
Graduated Checkbox	Indicates that the degree has been completed.
Terminal Degree for Discipline Checkbox	N/A
Qualifying Checkbox	Indicates whether or not this is a qualifying degree of the officer. Each officer should have one qualifying degree under which he or she was commissioned.
Accredited Checkbox	Indicates that the institution where the degree was obtained has met PHS accreditation standards.
Educator	A free text field. If applicable, indicates the name of the institution if it is a hospital or other facility rather than a school.

4. Click OK to return to Person Profile page

The screenshot shows a web application window titled "Person Profile" with a sub-section "View Degrees". It displays the following information:

- Empl ID: [REDACTED]
- Profile Type: PERSON Person
- Message: This page displays the item details. You are not authorized to update this Content Item.
- Details section with a search bar (Find | View All | First | 1 of 1 | Last) and a help icon.
- Fields and values:
 - Date Acquired: 05/22/1992
 - Degree: B Bachelors Degree
 - Major Code: 1504 NURSE-STRAIGHT GENERAL DUTY
 - Status: Active
 - Country: USA United States
 - State: ND North Dakota
 - School Code: 200253 MINOT STATE UNIVERSITY
 - Minor Code: [Empty]
 - Average Grade: [Empty]
 - Checkboxes:
 - Graduated
 - Terminal Degree for Discipline
 - Qualifying
 - Accredited
 - Educator: [Empty]
- An "OK" button is highlighted with a red box at the bottom left.

9 PHS MEMBER INFORMATION – VIEW ONLY ACCESS

1. From the Portal Homepage, click the [PHS Member Info](#) link located in the Core HR pagelet.



2. Enter the officer's Emplid in the search field.

NOTE: You can click on the magnifying glass to verify that the emplid belongs to the officer you want to run the report for.



3. Click the **Create Report** button to generate the report.



The output of the report will launch in PDF format in the system browser.

PHS OFFICER INFORMATION

Identification			
Name:		Employee ID:	
Status:	A	SERNO:	
Home/Mailing/Business Addresses			
Business Address:		Effective As Of:	02/11/2012
Mailing Address:		Effective As Of:	10/21/2010
Home Address:		Effective As Of:	10/21/2010
Phone Numbers			
Business Phone:			
Home Phone:			
Email Addresses			
Business Email:			
Emergency Contacts			
Name:		Relationship:	Brother
Name:		Relationship:	Spouse
Employee Information			
Birth Location:		Date of Birth:	
Country:	USA	Sex:	F
Marital Status:	Unknown		
Ethnicity			
Ethnic Group/Category:			
Security Clearance			
Agency:	OPM	SCI Eligible:	
Investigate Type:	SSBI	Investigate Date:	
Interim:		Interim Date:	
Clearance:		Clearance Granted:	
Call SECTEAM:::	N		
Agency Granting Clearance:	HHS	Adjudication Status:	Favor 3
Adjudication Date:		SF312 Date:	

PHS OFFICER INFORMATION

Current Employment Information							
Company:	PHS			Hire Date:			
Rank:	CAPT			Component:	PHS		
Employee Class	AD			Job Code:	Vetrinary Director		
Current Location:				Country:	USA		
Career Summary							
Date	Action	Reason	Department	Position	Job	Grade / Rank	Category
02/09/2012	Transfer	Permanent Change of Station		Regional Health Administrator	070093 Vetrinary Director	Ferm: / Temp: O6 / CAPT	Veterinarian
Service Dates							
Active Duty Base Date:							
Creditable Service Date:							
Exp Active Duty Term Date:							
Exp Loss Date:							
Seniority Credit Date:							
Training and Experience Date:							

PHS OFFICER INFORMATION

Basic Life Support Summary						
Rating Model	EMT Level	EMT Expr Date	1 st Responder Expr Date	BLS Expr Date	ATLS Expr Date	ACLS Expr Date
BLS			08/01/2010	11/12/2011		
Readiness Roles Summary						
Effective Date	Code	Readiness Role				Primary
03/16/2012	R00014	Epidemiologist				N
03/16/2012	R00003	Public Health Veterinarian				Y
Readiness Teams Summary						
Effective Date	Code	Readiness Team				
04/16/2009	MC	Mission Critical				
11/23/2009	SOG	Special Operations Group				
05/07/2010	SOG	Special Operations Group				
05/21/2010	SOG	Special Operations Group				
Administrative Flags Summary						
Effective Date	Code	Administrative Flag	Begin Date	End Date		

PHS OFFICER INFORMATION

Education Summary						
Date Acquired	Major Code	Degree	School	Qualifying	Accredited	
Licenses and Certifications Summary						
Issue Date	License	Expiration Date	State	Qualifying	Verified	
06/30/1959	Veterinarian	06/30/2012	MD	Y	N	
07/25/1995	Veterinarian	12/31/2011	VA	Y	N	
Honors and Awards Summary						
Issue Date	Code	Honor and Award	From Date	To Date	Grantor	
02/25/1997	CGPHSUC	Unit Commendation	10/01/1995	10/01/1996	PHS	
01/01/1998	CG2550	Bicentennial Unit Commendation	01/01/1998		PHS	
03/24/1998	CGHE	Army Achievement Medal			USA	
01/20/2000	CGPHSUC	Unit Commendation	07/01/1998	12/01/1999	PHS	
01/07/2002	CG170	Commendation Medal	03/01/2001	09/01/2001	PHS	
03/26/2004	CGPHSUC	Unit Commendation	03/01/2001	12/01/2003	PHS	
07/13/2004	CG185	Achievement Medal	08/01/2003	12/01/2003	PHS	
09/20/2004	CGPHSUN	Outstanding Unit Citation	04/01/2001	10/01/2003	PHS	
06/24/2005	CG4515	Commissioned Corps Training Ribbon			PHS	
11/08/2005	CG170	Commendation Medal	02/01/2004	07/01/2005	PHS	
01/23/2006	CG2545	Crisis Response Service Award	08/01/2005	02/01/2006	PHS	
06/16/2006	CGPHSUC	Unit Commendation	05/01/2005	08/01/2005	PHS	
08/17/2006	CGPHSUC	Unit Commendation	01/01/2005	12/01/2005	PHS	
01/24/2007	CGPHSUN	Outstanding Unit Commendation	08/01/2005	03/01/2006	PHS	
08/13/2007	CGPHSUC	Unit Commendation	01/01/2007	03/01/2007	PHS	
11/27/2007	CG4510	Regular Corps Ribbon			PHS	
01/14/2008	CG2530	Special Assignment Award	01/01/2005	12/01/2007	PHS	
12/15/2008	CG2545	Crisis Response Service Award	08/01/2008	10/01/2008	PHS	
08/06/2009	CG2555	Recruitment Service Ribbon	04/01/2006	08/01/2009	PHS	
12/10/2009	CG170	Commendation Medal	09/01/2008	09/01/2008	PHS	
01/12/2010	CGPHSUC	Unit Commendation	09/01/2008	09/01/2008	PHS	
04/18/2011	CGPHSUN	Outstanding PHS Unit	07/01/2009	01/01/2010	PHS	

PHS OFFICER INFORMATION

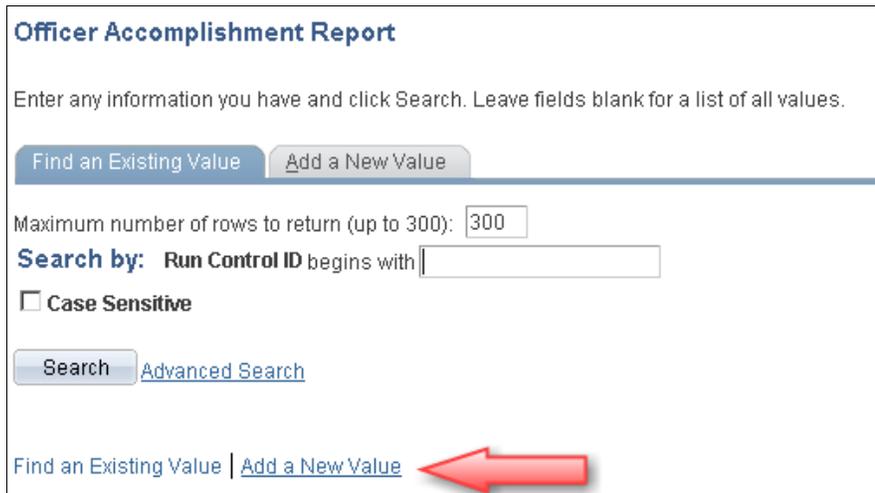
Training Summary				
Course	Title	Status	Start Date	End Date
030002	111 - NDMS in Review	Completed	02/18/2004	02/18/2004
030001	110 - Disaster Response	Completed	02/18/2004	02/18/2004
030009	125 - Occupational Safety	Completed	02/18/2004	02/18/2004
030024	201 - CCRP Overview	Completed	02/18/2004	02/18/2004
030025	202 - PHS History	Completed	02/18/2004	02/18/2004
030029	141 - Hlth Conseq and Response	Completed	02/18/2004	02/18/2004
030004	113 - Vet Issues in Disasters	Completed	02/19/2004	02/19/2004
030003	112 - DMAT Roles and Resp	Completed	02/19/2004	02/19/2004
030011	124 - Team Safety	Completed	02/19/2004	02/19/2004
030005	114 - Dis Mortuary Op Resp Tms	Completed	02/25/2004	02/25/2004
030030	142 - Disaster Triage	Completed	02/25/2004	02/25/2004
030032	147 - Critical Inc Stress Mgmt	Completed	02/25/2004	02/25/2004
030033	180 - Infectious Disease Mgmt	Completed	02/25/2004	02/25/2004
030035	182 - Terrorism	Completed	02/25/2004	02/25/2004
030036	183 - ABCs of Bioterrorism	Completed	02/25/2004	02/25/2004
030006	120 - Pers+Family Preparedness	Completed	02/26/2004	02/26/2004
030028	140 - Prev Med for Field Ops	Completed	02/26/2004	02/26/2004
030040	217 - Safety + Security Aware	Completed	02/26/2004	02/26/2004
030007	121 - Media Rel+Role of PIO	Completed	02/27/2004	02/27/2004
030049	324 - Basic Conc in Epidem	Completed	02/27/2004	02/27/2004
030048	322 - Public and Env Health	Completed	02/27/2004	02/27/2004
030045	216 - Working Effect Overseas	Completed	02/27/2004	02/27/2004
030041	212 - Health System Design	Completed	02/27/2004	02/27/2004
030040	211 - Civil Military Ops	Completed	02/27/2004	02/27/2004
030008	122 - Personal Gear	Completed	02/27/2004	02/27/2004
030026	130 - Incident Management Syst	Completed	02/27/2004	02/27/2004
030027	137 - Outreach Activities	Completed	02/27/2004	02/27/2004
030031	144 - Mass Gathering Medicine	Completed	02/27/2004	02/27/2004
030034	181 - Haz Mat Awar- NDMS Teams	Completed	02/27/2004	02/27/2004
030037	185 - NDMS Tm Ops in Host Env	Completed	02/27/2004	02/27/2004
030038	187 - Refugee Health Care	Completed	02/27/2004	02/27/2004
030039	210 - Cultural Awareness	Completed	02/27/2004	02/27/2004
030043	214 - Staying Healthy Overseas	Completed	03/01/2004	03/01/2004
030042	213 - International Deployment	Completed	03/01/2004	03/01/2004
030047	219 - Incident Command System	Completed	03/02/2004	03/02/2004
030044	215 - The Fog of Relief	Completed	03/02/2004	03/02/2004
030012	126 - Aircraft Safety	Completed	03/10/2004	03/10/2004
030013	131 -Tents and Command Setup	Completed	03/10/2004	03/10/2004
030014	132 - Field Pharmacy	Completed	03/11/2004	03/11/2004
030015	133 - Logistical Issues	Completed	03/11/2004	03/11/2004
030016	134 - Telecommunications	Completed	03/11/2004	03/11/2004
030017	135 - Information Technology	Completed	03/11/2004	03/11/2004
030018	136 - Litter Bearing	Completed	03/11/2004	03/11/2004
030019	143 - Legal Issues And Answers	Completed	03/11/2004	03/11/2004
030023	172 - Intraosseous Infusion	Completed	03/11/2004	03/11/2004
030050	150 - Airway Management	Completed	03/11/2004	03/11/2004
030083	310 - Dealing With Grief	Completed	03/17/2004	03/17/2004

10 OFFICER ACCOMPLISHMENTS – VIEW ONLY ACCESS

1. From the Portal Homepage, click on the [Officer Accomplishments](#) link located in the Reports pagelet.

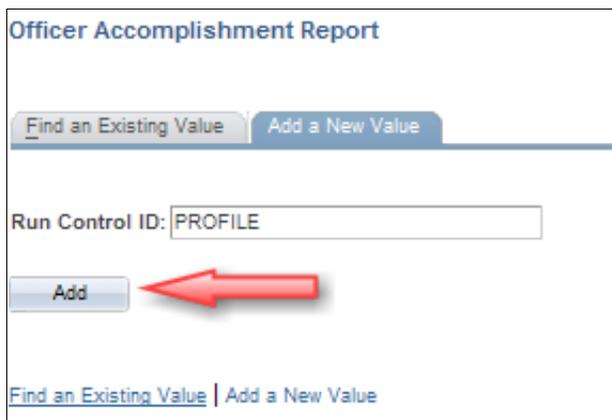


2. If this is the first time you are running the report, click the [Add a New Value](#) link.



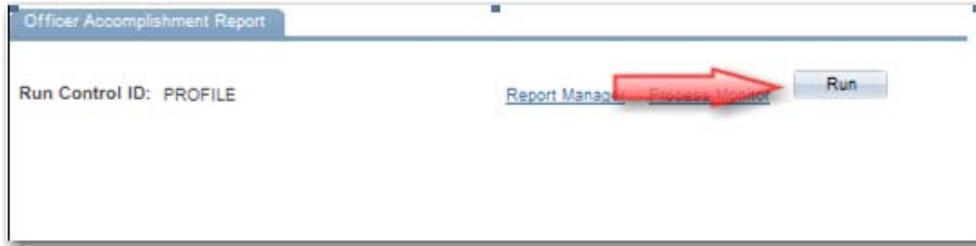
The screenshot shows the 'Officer Accomplishment Report' form. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. A search section includes a text box for 'Maximum number of rows to return (up to 300):' with '300' entered, and a 'Search by:' dropdown set to 'Run Control ID begins with' followed by an empty text box. There is also a 'Case Sensitive' checkbox which is unchecked. Below the search section are 'Search' and 'Advanced Search' buttons. At the bottom of the form, the 'Add a New Value' link is highlighted with a red arrow pointing to it.

3. Enter your Run Control ID. For this example, the Run Control ID will be PROFILE. Click the **Add** button.

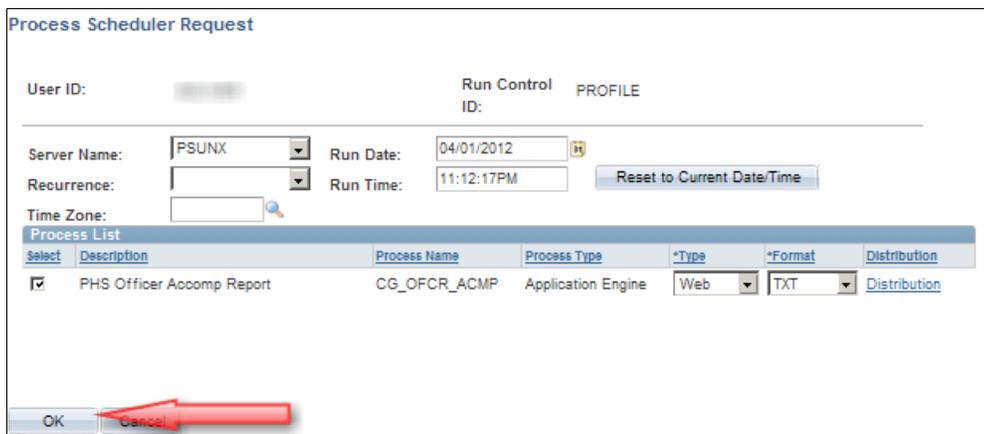


The screenshot shows the 'Officer Accomplishment Report' form with the 'Run Control ID' field filled with the text 'PROFILE'. The 'Add' button is highlighted with a red arrow pointing to it. The 'Find an Existing Value' and 'Add a New Value' buttons are also visible at the top and bottom of the form.

- Click the **Run** button.



- Select the Server Name 'PSUNX', Type 'Web' and Format 'TXT'. After you select the parameters for the process you want to run, click the **OK** button to submit the request.



It will take you back to the Officer Accomplishments page. Note the process Instance Number. This is the number you will use to track your report in the Process Monitor.

- Click the [Process Monitor](#) link located in the top right corner of the page.



Once you have clicked the Process Monitor link the system launches Process Monitor where you can see the status of the job.

NOTE: When you initially submit your job it may have a run status of **Processing**, **Queued** or **Initiated**. At any time, you may click the **Refresh** button. This initiates a screen refresh that will provide you with the most current status of your submitted job. When the job completes, you should see a run status of **Success**.

- Once the status says Success, click the [Details](#) link to view your report.

Process List | Server List

View Process Request For

User ID: [] Type: [] Last: [] 1 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"/>	37331		Application Engine	CG_OFCR_ACMP	[]	04/01/2012 11:12:17PM PDT	Success	Posted	Details

- Click the [View Log/Trace](#) link to view the report you just submitted.

Process

Instance: 37331 Type: Application Engine

Name: CG_OFCR_ACMP Description: PHS Officer Accomp Report

Run Status: Success Distribution Status: Posted

Run Control ID: PROFILE

Location: Server

Server: PSUNX

Recurrence:

Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

Date/Time

Request Created On: 04/01/2012 11:14:11PM PDT

Run Anytime After: 04/01/2012 11:12:17PM PDT

Began Process At: 04/01/2012 11:14:26PM PDT

Ended Process At: 04/01/2012 11:41:04PM PDT

Actions

- [Parameters](#) Transfer
- [Message Log](#) [View Locks](#)
- [Batch Timings](#)
- [View Log/Trace](#)

- A second browser window will appear listing the report you just submitted. Click your report (in this case, Officer Accomplishments Report.csv).

View Log/Trace

Report

Report ID: 37830 Process Instance: 37331 [Message Log](#)

Name: CG_OFCR_ACMP Process Type: Application Engine

Run Status: Success

PHS Officer Accomp Report

Distribution Details

Distribution Node: RPTNODE Expiration Date: 04/08/2012

File List

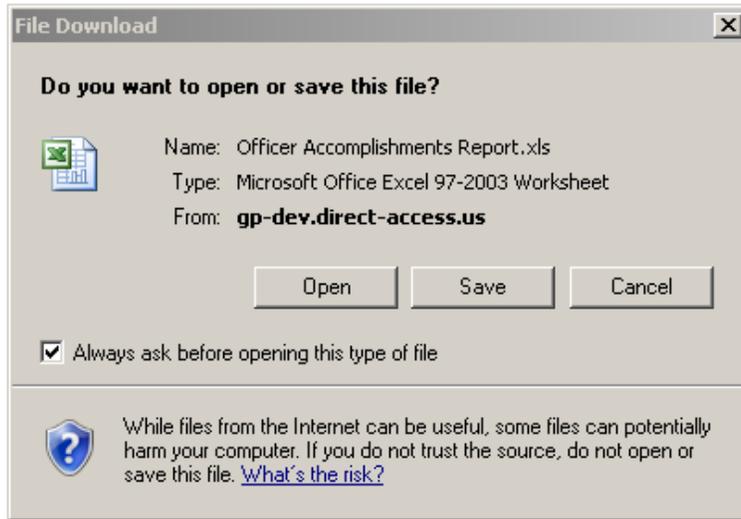
Name	File Size (bytes)	Datetime Created
AE.CG_OFCR_ACMP.37331.stdout	341	04/01/2012 11:41:04.475032PM PDT
Officer Accomplishments Report.csv	2,821,100	04/01/2012 11:41:04.475032PM PDT

Distribute To

Distribution ID Type *Distribution ID

User []

10. Click **Open** to review the output or click **Save** if you would like to save the document and come back to it later.



The system launches Microsoft Excel, which displays your output.

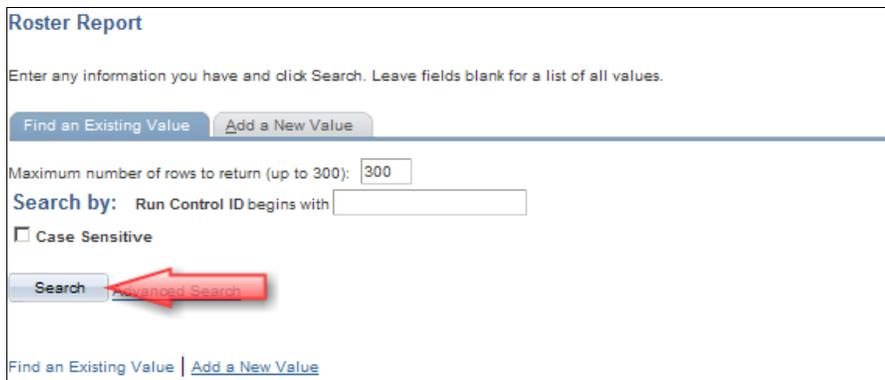
1	Empl Id	Name	Serial Number	Rank	Employee Class	Category Discipline	Business Email	Business Phone
2				CAPT Pharmacist	Regular	Pharmacist		
3				LCDR Nurse Officer	Selected Reserve	Nurse		
4				ENS HSO-General	Inactive Ready Reserve	HSO-General		
5				CDR Pharmacological Scientist	Regular	Pharmacological Scientist		
6				CDR Microbiologist	Regular	Microbiologist		
7				CDR Microbiologist	Regular	Microbiologist		
8				ENS HSO-General	Inactive Ready Reserve	HSO-General		
9				ENS HSO-General	Inactive Ready Reserve	HSO-General		

11 ROSTER - VIEW ONLY ACCESS

1. From the Portal Homepage, click on the [Roster](#) link located in the Reports pagelet



2. If this is the first time you are running a report, follow the instructions above under section [1 Officer Accomplishments Report, step 1.2](#) to add a new Run Control ID. If you have previously run any report through the Process Scheduler, enter the Run Control ID or click the Search button to find the value.



The screenshot shows the 'Roster Report' search interface. At the top, it says 'Roster Report' and 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. There is a text input field for 'Maximum number of rows to return (up to 300):' with the value '300' entered. Below that is a 'Search by:' section with the text 'Run Control ID begins with' followed by an empty text input field. There is a checkbox for 'Case Sensitive' which is unchecked. At the bottom of the search section, there are two buttons: 'Search' and 'Advanced Search'. A red arrow points to the 'Search' button. At the very bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.

3. Select the Run Control ID.

NOTE: The system allows the user to use the same Run Control ID to run any report through the Process Scheduler.

Roster Report

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

Search by: Run Control ID begins with

Case Sensitive

Search | Advanced Search

Search Results

View All | First | 1-2 of 2 | Last

Run Control ID	Language Code
ACCOMP	English
PROFILE	English

Find an Existing Value | Add a New Value

4. Click the **Run** button.

Roster Report

Run Control ID: PROFILE

Report Manager  Run

5. Select the Server Name 'PSUNX', Type 'Web' and Format 'TXT'. After you select the parameters for the process you want to run, click the **OK** button to submit the request.

Process Scheduler Request

User ID: Run Control ID: PROFILE

Server Name: Run Date: 

Recurrence: Run Time:

Time Zone: 

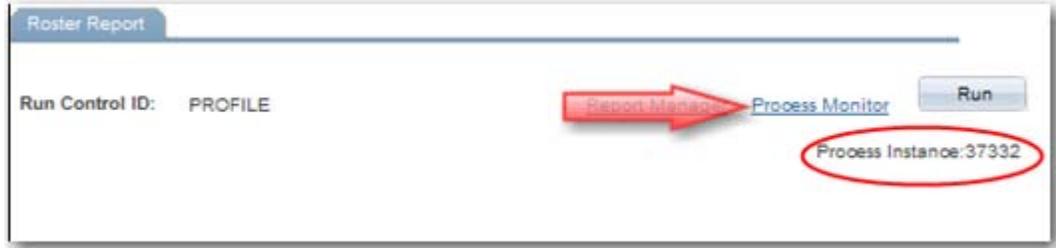
Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PHS Roster report	CG_ROSTERRPT	Application Engine	Web	TXT	Distribution



The system will take you back to the Roster Report page. Note the process Instance Number. This is the number you will use to track your report in the Process Monitor.

6. Click the [Process Monitor](#) link located in the top right corner of the page.



Once you have clicked the Process Monitor link the system launches Process Monitor where you can see the status of the job.

NOTE: When you initially submit your job it may have a run status of **Processing**, **Queued** or **Initiated**. At any time, you may click the **Refresh** button. This initiates a screen refresh that will provide you with the most current status of your submitted job. When the job completes, you should see a run status of **Success**.

7. Once the status says Success, click the [Details](#) link to view your report.

The screenshot shows the 'Process List' page. At the top, there are tabs for 'Process List' and 'Server List'. Below the tabs is a 'View Process Request For' section with various filters and a 'Refresh' button. The main content is a table with the following columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The first row is highlighted in red and contains the following data: Instance 37332, Process Type Application Engine, Process Name CG_ROSTERRPT, Run Date/Time 04/02/2012 12:17:07AM PDT, Run Status Success, and Distribution Status Posted. A red arrow points to the 'Details' link in the last column of this row.

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	37332		Application Engine	CG_ROSTERRPT		04/02/2012 12:17:07AM PDT	Success	Posted	Details
<input type="checkbox"/>	37331		Application Engine	CG_OFCCR_ACOMP		04/01/2012 11:12:17PM PDT	Success	Posted	Details

- Click the [View Log/Trace](#) link to view the report you just submitted.

Process Detail

Process	
Instance:	37332
Type:	Application Engine
Name:	CG_ROSTERRPT
Description:	PHS Roster report
Run Status:	Success
Distribution Status:	Posted

Run	Update Process
Run Control ID: PROFILE	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 04/02/2012 12:19:07AM PDT	Parameters Transfer
Run Anytime After: 04/02/2012 12:17:07AM PDT	Message Log View Locks
Began Process At: 04/02/2012 12:19:12AM PDT	Batch Timings
Ended Process At: 04/02/2012 12:43:31AM PDT	View Log/Trace 

- A second browser window will appear listing the report you just submitted. Click your report (in this case, PHS Roster Report.csv).

View Log/Trace

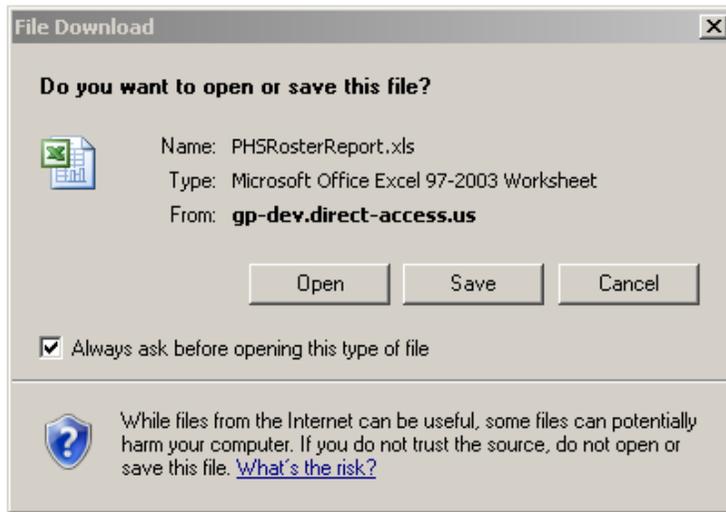
Report	
Report ID: 37831	Process Instance: 37332 Message Log
Name: CG_ROSTERRPT	Process Type: Application Engine
Run Status: Success	
PHS Roster report	

Distribution Details	
Distribution Node: RPTNODE	Expiration Date: 04/09/2012

File List		
Name	File Size (bytes)	Datetime Created
AE.CG_ROSTERRPT_37332.stdout	328	04/02/2012 12:43:31.846222AM PDT
*HSRosterReport.csv	3,618,628	04/02/2012 12:43:31.846222AM PDT

Distribute To	
Distribution ID Type	*Distribution ID
User	

10. Click **Open** to review the output or click **Save** if you would like to save the document and review it later.



The system launches Microsoft Excel, which displays your output.

EmpId	Rank	Temp Grade	Temp Grade Entry Date	Name	Ssnno	Employee Class	DeptId	Dept Name	Retirement Credit Date	Date of Rank	Report Date	Position Nbr
1	RACM	08	8/1/2008			AD	20463	HSAC70898	6/21/1986	8/1/2008	8/1/2008	106506
2	RACM	07	5/24/2010			AD	10913	ACM	1/17/1988	5/24/2010	11/30/2010	102139
3	RACM	08	2/1/2009			AD	21790	RV	3/21/1984	2/1/2009	2/1/2009	102505
4	RACM	07	8/24/2009			AD	36811	RA11	7/19/1986	8/24/2009	5/29/2010	102506
5	CAPT	06	12/31/2008			AD	11630	CO5	5/7/1986	12/31/2008	12/31/2008	102596
6	CAPT	06	11/1/2009			AD	11595	CCA	8/3/1988	11/1/2009	11/1/2009	102647
7	RACM	08	5/31/2009			AD	12398	DAL	7/3/1983	5/31/2009	5/31/2009	102686
8	RACM	08	5/31/2009			AD	12398	DAL	7/3/1983	5/31/2009	5/31/2009	102686

12 EXPIRING LICENSES – VIEW ONLY ACCESS

1. From the Portal Homepage, click on the [Expiring Licenses](#) link located in the Reports pagelet



2. Enter **PHS** in the search field.

The screenshot shows the search interface for the 'CG_PHS_EXPIRINGLICENSES - PHS Expiring Licences Report'. It features a search field labeled 'CG or PHS:' with a red arrow pointing to it. Below the search field is a 'View Results' button. At the bottom, there is a table header with the following columns: EMPLID, Name, PHS Serial Number, Rank, Category Discipline, Empl Class, License and Certificate Code, Descr, Issue Date, License #, Issued By, Expiration Date, Number of days, Type of Restriction, Qualifying, and Email.

3. Click the **View Results** button,

This screenshot is similar to the previous one, but the search field now contains the text 'PHS'. A red arrow points to the 'View Results' button, indicating it should be clicked.

The output of the report will launch in the system browser. If preferred, click Download results in Excel Spreadsheet to view the output in Microsoft Excel.

NOTE: This report will NOT report officer's who are missing an email address on their record.

CG_PHS_EXPIRINGLICENCES - PHS Expiring Licences Report

CG or PHS: PHS

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (5198 kb)

[View All](#) First 1-100 of 2881 Last

	EMPLID	Name	PHS Serial Number	Rank	Category Discipline	Empl Class	License and Certificate Code	Descr	Issue Date	License #	Issued By	Expiration Date	Number of days	Type of Restriction	Qualifying	Email
1				CAPT	HSO-General	AD	CLNPSY	Clinical Psychology	04/21/2011	1174	NM BOARD OF PSYCHOLOGIST EXAM	07/01/2012	90	0-None	Y	
2				LCDR	Medical Officer	RSV	MEDICAL	Medical	11/20/2008	A-1475-08	NM BOARD OF MEDICAL EXAMINERS	07/01/2012	90	0-None	Y	
3				CDR	Medical Officer	RSV	MEDICAL	Medical	09/15/2006	35.088861	OH MEDICAL BOARD	07/01/2012	90	0-None	Y	
4				CDR	Medical Officer	AD	MEDICAL	Medical	07/01/1959	21275	OK MEDICAL LIC AND SUPERVISION	07/01/2012	90	0-None	Y	

13 LICENSE VALIDATION – VIEW ONLY ACCESS

- From the Portal Homepage, click on the [License Validation](#) link located in the Reports pagelet.



- The output of the report will launch in the system browser. If preferred, click Download results in Excel Spreadsheet to view the output in Microsoft Excel.

CG_PHS_LICENSE_VALIDATION- License row validation report

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (150 kb)

[View All](#) First 1-89 of 89 Last

	EMPLID	Rank	Name	SERNO	Empl Class	Email	License/Certificate Code	License Description	Issue Date	License/Certification Number	Issued By	Last Updated By	Last Update Date/Time
1		LCDR			RSV		CLSI	Cardiac Life Support Instruc	02/01/2010				03/20/2012 4:43:52PM
2		LCDR			RSV		CLSI	Cardiac Life Support Instruc	02/16/2012				03/21/2012 1:09:14PM
3		LCDR			RSV		NRSRN	Nursing	06/30/2007				03/21/2012 3:19:26PM
4		LT			RSV		THERPHYS	Therapist Physical	04/01/2009	5638			03/16/2012 3:17:43PM