



PSCINST 5730.1

SEP -4 2009

COAST GUARD PERSONNEL SERVICE CENTER INSTRUCTION 5730.1

Subj: ELECTRONICALLY-ROUTED CORRESPONDENCE PREPARATION AND TRACKING

Ref: (a) Congressional Correspondence Handbook
(b) Coast Guard Correspondence Manual, COMDTINST M5216.4C

1. PURPOSE. This instruction prescribes processes and provides guidelines for Coast Guard Personnel Service Center (CG PSC) and PSC field units drafting responses to electronically-routed¹ Congressional and general correspondence forwarded from the Commandant's office for CG PSC signature.
2. ACTION. CG PSC and PSC field units must ensure compliance with the provisions of this instruction. The goal is to produce high quality, timely, thorough, and discernible replies when drafting responses to correspondence. All correspondence must be cordial, responsive, clear, grammatically correct, and logically formatted in accordance with references (a) and (b). PSC field units must comply only with the applicable portions of this instruction and use this as a guide in managing their own internal processes to ensure consistency.
3. DIRECTIVES AFFECTED. None.
4. PROCEDURES. Enclosure (1) is a quick-reference guide that simplifies and provides step-by-step procedures to assist CG PSC and PSC field units with completing electronically-routed correspondence. Enclosure (2) provides sample letters to members of Congress and includes commonly used inside addresses and salutations.

¹ Electronically-routed correspondence refers to correspondence routed from external offices (i.e., DHS, Commandant) via an electronic database system.

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	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A																										
B																										
C																								1		1
D																										
E																										
F																	1									
G																										
H																										

NON-STANDARD DISTRIBUTION:

SEP - 4 2009

to a routing code, with a designated primary and secondary user. Designated users are required to obtain a standby, with an ECT license, in their absence. Correspondence in ECT will be forwarded from the CG PSC administrative staff to the appropriate division/staff/unit via ECT routing code as designated below:

- (1) USCG-PSC - BOPS, Business Operations Staff
- (2) USCG-PSC - CSC, Community Services Command
- (3) USCG-PSC - EPM, Enlisted Personnel Management Division
- (4) USCG-PSC - HRA, Human Resources and Administration Staff
- (5) USCG-PSC - HSWL, Health, Safety, and Work-Life Support Activity
- (6) USCG-PSC - OPM, Officer Personnel Management Division
- (7) USCG-PSC - PPC, Pay and Personnel Center
- (8) USCG-PSC - PSD, Personnel Services Division
- (9) USCG-PSC - RPM, Reserve Personnel Management Division

6. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. Environmental considerations were examined in the development of this instruction and have been determined not applicable.
7. FORMS/REPORTS. A sample CG Form 4217, Interim Response is included as enclosure (3); form is available in the Adobe forms library located in the U.S. Coast Guard Electronic Forms System.



D. A. NEPTUN

- Encl: (1) Quick Reference Guide for CG PSC Action Divisions/Staffs/Units
(2) Congressional / DHS Tasker example
(3) CG-4217, Interim Response example
(4) PSC ECT/IQ Correspondence User Guide

***The Written Response to
External Correspondence Inquiries
Quick Reference Guide for PSC Action
Divisions/Staff/Units***

Inquiry Arrives

Commandant's administrative staff forwards to the CG PSC administrative staff for proper routing within CG PSC.



Inquiry is staffed by CG PSC's administrative staff

When the inquiry is received by the CG PSC's administrative staff, a word template is attached to the workflow and the workflow is assigned to the appropriate division/staff and a due date is assigned.



Action Office receives tasking

When the tasking is received, the following deadlines may apply:

Three working days to respond for Commandant's signature.

Eight working days to respond for Deputy's signatures.

For congressional inquiries forwarded from DHS, DHS will assign deadlines.



Forward Draft Response to CG PSC's administrative staff

After clearance at the CG PSC division/staff/unit level, save changes in ECT and forward the workflow to the CG PSC administrative staff for format review. CG PSC divisions/staff must forward a hard copy of the response and supporting documents in a green folder. If more information is needed, the CG PSC's administrative staff will return the correspondence to the drafting division/staff/unit for revision/resubmission.

*The Written Response to
External Correspondence Inquiries*
**Quick Reference Guide for
Divisions/Staff/Units**

(Continued):

***Draft Responses Forwarded to CG PSC administrative
staff / CG PSC (cd) signature***

After the CG PSC's administrative staff reviews for format, correspondence is forwarded to the PSC Deputy Commander and some cases CG PSC for signature.



Mailing

When signed, the original response is dated and mailed to the originator by the CG PSC's administrative staff. The CG PSC administrative staff will make two copies: (1) file copy for CG PSC administrative staff and (2) division/staff file.



Monitoring Status

The CG PSC administrative staff is responsible for monitoring timely submission of electronically-tracked correspondence. Every Friday, the CG PSC's administrative staff sends action offices a list detailing the congressional responses that are overdue. Action divisions/staff/unit must submit status of delinquent responses as soon as notified.

Enclosure (2) to PSCINST 5730.1

U.S. Department of
Homeland Security

United States
Coast Guard



Commander
United States Coast Guard
Personnel Service Center

Stop 7200
4200 Wilson Blvd, Suite 1100
Arlington, VA 20598-7200
Phone: (202) 493-1901
Fax: (202) 493-1218

5730
CXXXXXXX ◀ Workflow #

The Honorable (Full Name)
Member, United States House of Representatives
Street Address
City, State ZIP + four

Dear Representative (Last Name):

When responding to a congressional inquiry, always refer to the date of the Representative's letter and use civilian date format and the name of the constituent in the opening sentence. (e.g. *This is in response to your letter dated April 3, 2009 , regarding your constituent, ..*)

When a congressional response is more than one page, a subject line will be included one inch from the top of the second page and succeeding pages of the correspondence. Use the following example:

Subj: RESPONSE TO REPRESENTATIVE (last name) 5730
 INQUIRY OF (date of inquiry) CONCERNING date
 (subject of letter and/or constituent's name)

All responses must close with "The Coast Guard House Liaison Office at (202) 225-4775 would be pleased to respond to any further questions you or your staff may have. Thank You!"

Sincerely,

D. A. NEPTUN
Rear Admiral, U. S. Coast Guard
By direction of the Commandant

U.S. Department of
Homeland Security

United States
Coast Guard



Commander
United States Coast Guard
Personnel Service Center

Stop 7200
4200 Wilson Blvd, Suite 1100
Arlington, VA 20598-7200
Phone: (202) 493-1212
Fax: (202) 493-1223

5730
CXXXXXX

The Honorable (Full Name)
United States Senate
Street Address
City, State ZIP + four

Dear Senator (Last Name):

When responding to a congressional inquiry, always refer to the date of the Senator's letter and use civilian date format e.g. (April 3, 2002) and the name of the constituent in the opening sentence. . (e.g. *This is in response to your letter dated April 3, 2009 , regarding your constituent, ..*)

When a congressional response is more than one page, a subject line will be included one inch from the top of the second page and succeeding pages of the correspondence.

All responses must close with "The Coast Guard Senate Liaison Office at (202) 224-2913 would be pleased to respond to any further questions you or your staff may have. Thank You!"

Sincerely,

D. A. NEPTUN
Rear Admiral, U. S. Coast Guard
By direction of the Commandant

Encl: (1) List enclosure *(if needed)*
(2) List enclosure

Copy: *If the Congress member requests the constituent be responded to directly, type "Copy: The Honorable (Last name)."*

OTHER INSIDE ADDRESSES AND SALUTATIONS

1. If a member of Congress requests the response be directed to his/her Washington Office:

The Honorable (Full Name)
House of Representatives
Washington, DC 20515 + four (Use nine digit zip codes)

Dear Representative _____:

2. All letters addressed to a member of Congress in his/her District Office:

The Honorable (Full Name)
Member, United States House of Representatives
Local Address
City, State ZIP + four

3. If a Senator requests the response to be directed to his/her State Office:

The Honorable (Full Name)
United States Senator
Local Address
City, State ZIP + four

Dear Senator _____:

4. All letters addressed to a Senator in his/her Washington Office:

The Honorable (Full Name)
United States Senate
Washington, DC 20510 + four

Dear Senator _____:

5. Letters to a member of Congress/Senator who is a Chairman of a Committee/Subcommittee will be addressed to the Chairman if they address matters under the purview of the committee/subcommittee or when writing on committee business.

House Committee

The Honorable (Full Name)
Chairman/Madam Chairwoman, Committee on _____
House of Representatives
Washington, DC 20515 + four

Dear Mr. Chairman/Madam Chairwoman:

Senate Committee

The Honorable (Full Name)
Chairman/Madam Chairwoman, Committee on _____
United States Senate
Washington, DC 20510 + four

Dear Mr. Chairman/Madam Chairwoman:

6. Letters to a member of Congress/Senator who is a Chairman of a Subcommittee will be addressed to the Chairman if they address matters under the purview of the subcommittee or when writing on subcommittee business.

House Subcommittee

The Honorable (Full Name)
Chairman/Madam Chairwoman, Subcommittee on _____
House of Representatives
Washington, DC 20515 + four

Dear Mr. Chairman/Madam Chairwoman:

Senate Subcommittee

The Honorable (Full Name)
Chairman/Madam Chairwoman, Subcommittee on _____
United States Senate
Washington, DC 20510 + four

Dear Mr. Chairman/Madam Chairwoman:

7. Replying to Congressional staff members

When a member of Congress/Senator requests that the reply be sent to a member of their staff, the reply shall be addressed to the Congress/Senate member and the envelope shall be marked, "ATTN: (name of staff member)" in the address block, above the street address line. Do not use the "ATTN" on the letter itself, only on the envelope.

8. Replying directly to Constituents

When a member of Congress/Senator requests that the reply be sent directly to the constituent, also send a copy to the member of Congress.

U.S. Department of Homeland Security CG-4217 (05-04)	<h2 style="margin: 0;">Interim Response</h2>						
BLOCK (1) FROM: <i>(Office, Directorate, Command)</i>	BLOCK (3) DATE: <i>(G-ICA Only)</i>						
BLOCK (2) TO: <i>(Inquiry Originator)</i>							
BLOCK (4) This is an interim reply to your inquiry: <i>(Describe: Control number, date, and subject. Attach a copy of inquiry)</i>							
BLOCK (5) REMARKS: Select ONE of the following options <i>(5a or 5b, Not Both)</i>							
BLOCK (5a.) <input type="checkbox"/> We are unable to respond to your inquiry and have forwarded it to:							
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; padding: 2px;">Unit Name</td> <td style="width: 75%;"></td> </tr> <tr> <td style="padding: 2px;">Address</td> <td></td> </tr> <tr> <td style="padding: 2px;">POC Name</td> <td style="padding: 2px;">Telephone</td> </tr> </table>	Unit Name		Address		POC Name	Telephone	
Unit Name							
Address							
POC Name	Telephone						
<input type="checkbox"/> FOR DIRECT REPLY <input type="checkbox"/> TO OBTAIN INFORMATION FOR US <input type="checkbox"/> TO COMPLY WITH YOUR REQUEST <input type="checkbox"/> OTHER <i>(Explain)</i> _____							
OR							
BLOCK (5b) <input type="checkbox"/> We will respond to your inquiry but need more time.							
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> This is the reason for the delay: </td> </tr> <tr> <td style="height: 40px;"></td> </tr> <tr> <td style="padding: 5px;"> Currently, we have this information for you: </td> </tr> <tr> <td style="height: 40px;"></td> </tr> <tr> <td style="padding: 5px;"> We expect to send a final reply on: _____ <div style="text-align: right; margin-left: 150px;"><i>(Date)</i></div> </td> </tr> </table>		This is the reason for the delay:		Currently, we have this information for you:		We expect to send a final reply on: _____ <div style="text-align: right; margin-left: 150px;"><i>(Date)</i></div>	
This is the reason for the delay:							
Currently, we have this information for you:							
We expect to send a final reply on: _____ <div style="text-align: right; margin-left: 150px;"><i>(Date)</i></div>							
BLOCK (6) NAME, GRADE AND TITLE:	BLOCK (7) SIGNATURE: <i>(by direction)</i>						

INSTRUCTIONS FOR COMPLETING CG FORM 4217

1. Responding office, directorate or command.
2. Name or office of inquiry origin.
3. Leave blank, CG-0921 will stamp date before sending form to member of Congress.
4. Reference the inquiry. Provide the control number, date, and subject. Attach a copy of the inquiry.
5. Select one of the following options:
 - 5a. Select if the inquiry will be forwarded to another directorate, command, or unit for further information or assistance.
 - 5b. Select if action office will respond and draft a reply to the inquiry.
 - a. Clearly explain the reason for the delay.

Examples of acceptable reasons are:

- i. We need more time to research facts for a response.
- ii. The subject matter expert is not available now, but will be available (month, day and year).
- iii. We have gathered facts, but due to the complication of the inquiry we have not reached an agreement on how to respond yet.

Examples of unacceptable reasons are:

- i. We misplaced the inquiry.
 - ii. The inquiry sat in my inbox.
 - iii. The inquiry was assigned to the wrong individual.
- b. Provide any current information you have available at this time.
 - c. Ensure the final reply is provided no later than the date listed.
6. Leave blank, CG PSC(c) or PSC (cd) will sign in this block.

PSC ECT/IQ Correspondence



User Guide

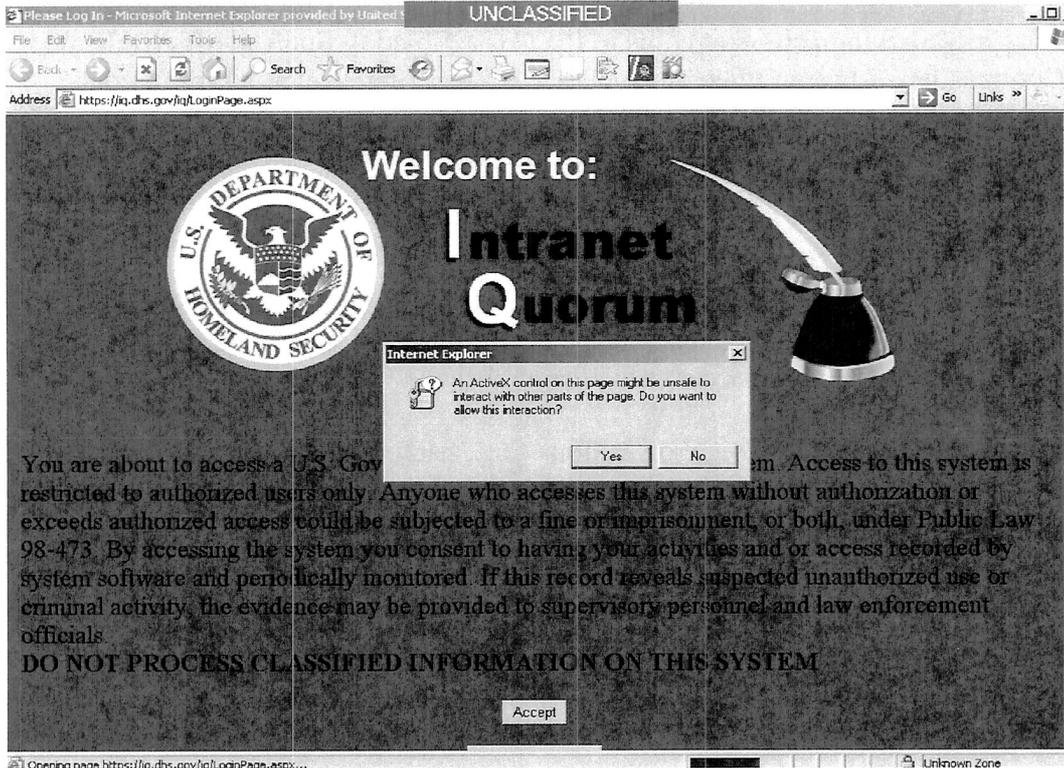
ECT Business Rules

1. The CG PSC administrative staff will determine the letter template format for all ECT correspondence.
2. Keep paper archive records and follow the disposition schedule as outlined in COMDTINST M5112.12A, Information and Life Cycle Management Manual.
3. Congressional Inquiries that come to the Coast Guard through an office other than the Commandant's Front Office, must be sent to the Commandant's Front Office.
4. When reassigning a workflow you must use the "Workflow Routing Note" function to explain why it is being reassigned. Ensure the "Send Alert" box is checked prior to completing the step.
5. All users must set up the "Act As" function for at least one other user in their division/staff/unit. This will enable another ECT user to act on your behalf and keep workflows from being inaccessible in your absence.
6. Standard Microsoft © navigation buttons (e.g., back, next, 'X' to close buttons, etc) should not be used in ECT. Navigate using the "Action Menu" on the left side and the Tabs at the top of the ECT screen. Close ECT windows from the "Action Menu" when necessary.

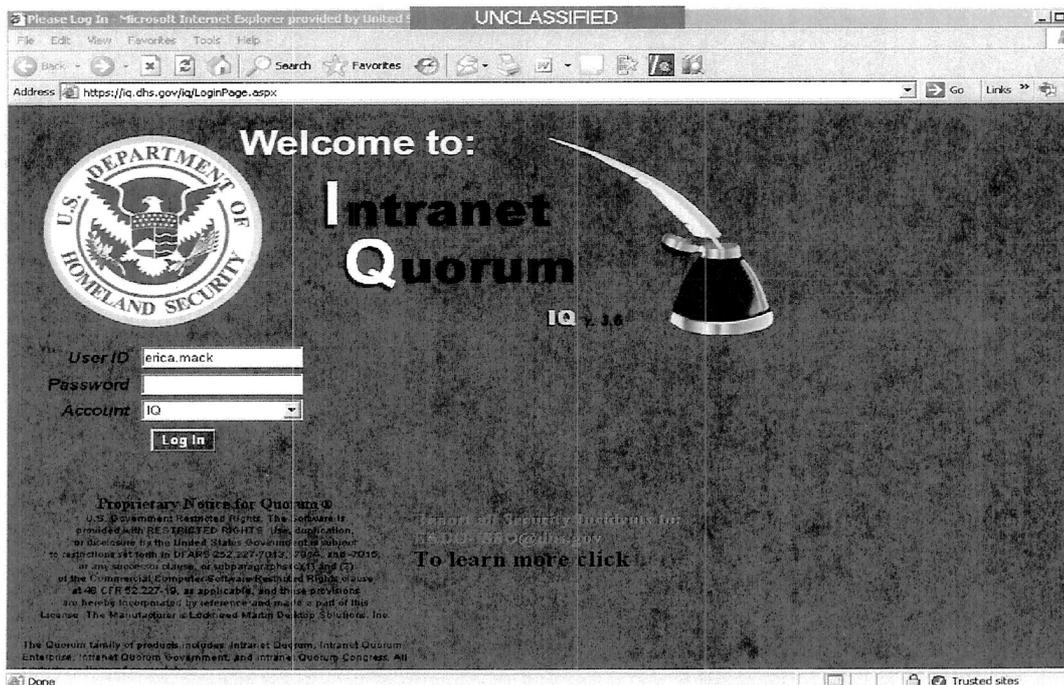
Congressional / General / DHS Tasker ECT Process

Receiving a Workflow Alert

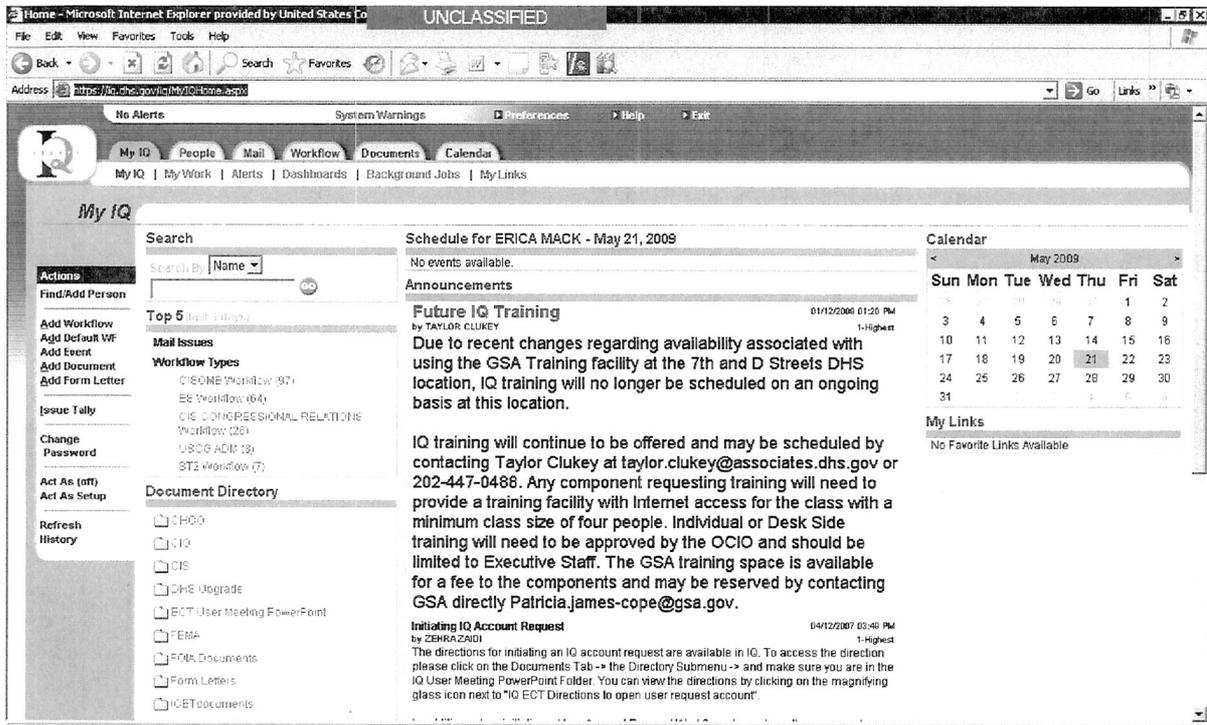
1. The action office (PSC-EPM, PSC-RPM, PSC-OPM, PSC-PSD, PSC-HR&A, PSC-PPC, PSC-BOPS, PSC-HSWL, PSC-CSC) will receive an Outlook alert. Clicking the link in the email will take you to the ECT/IQ log in web page. Select “Yes” to the ActiveX control message, read the DHS IQ user prompt and select “Accept” once completed.



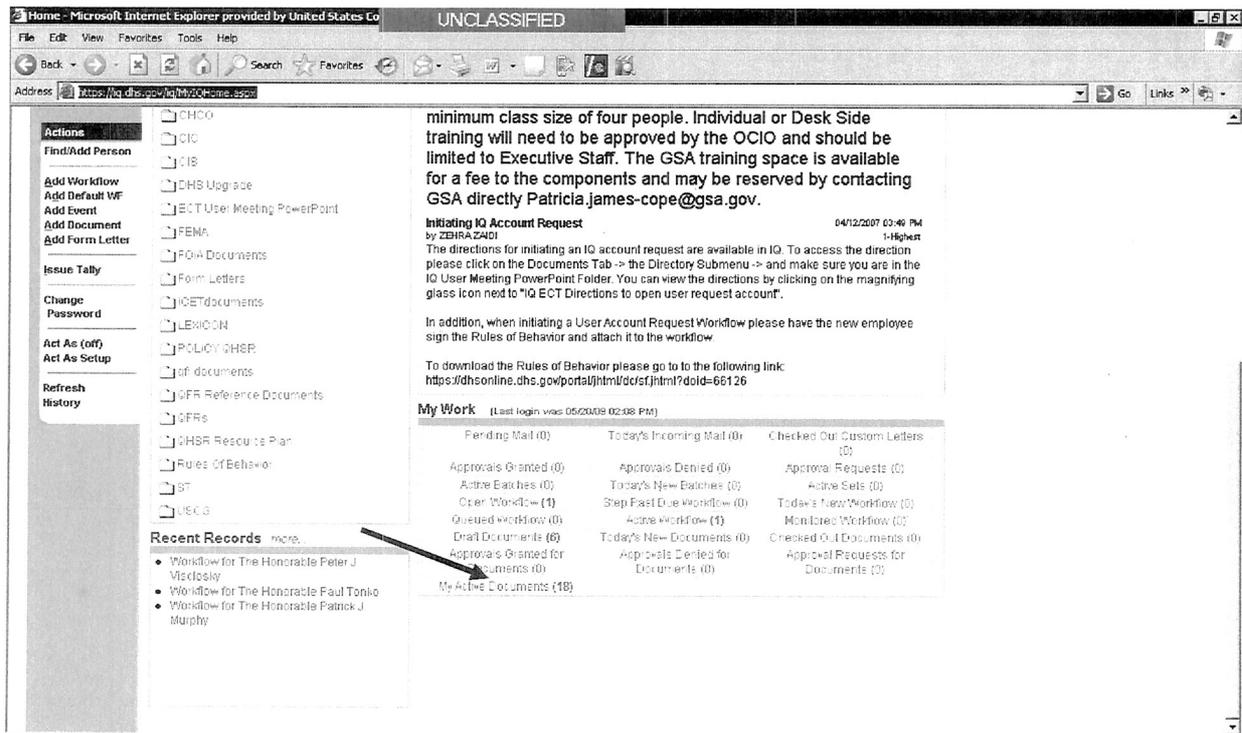
2. Sign in using your user ID and password.



3. Upon signing in you will come to the My IQ home page.



4. From my IQ Home Page, scroll down and select “Queued Workflow”.



Acquiring Ownership of the assigned workflow

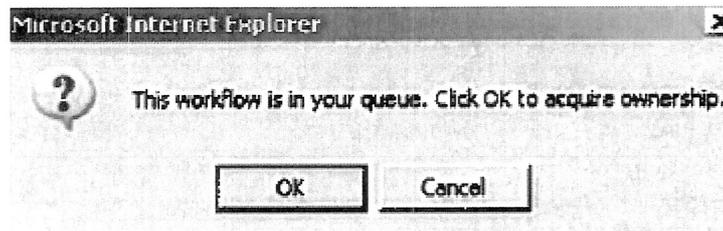
1. Open the workflow by selecting the workflow ID number.

The screenshot shows a web browser window titled "Workflow - Microsoft Internet Explorer provided by United States". The address bar shows a URL from https://iq.dhs.gov/iq/workflow/home.aspx. The page displays "My Queued Workflow - 1" with a table of workflow items. An arrow points to the first row in the table.

#	ID	Primary Person	People	Opened By	Template	Step	Step Status	Assigned To	Remind Date	Workflow Due Date	Workflow Opened	Workflow Closed	Age	Queue Time
1	826543	The Honorable Peter J. Vislosky 108th Members of Congress Democrat 100th Members of Congress HOUSE COMMITTEE ON APPROPRIATIONS 111th Members of Congress	The Honorable Peter J. Vislosky U.S. House of Representatives	MARGARET ANDERSON	USCG Congressional	Divisional Action	Active	ERICA MACK		06/01/2009 04:00 PM	05/15/2009 10:15 AM		6	3

Below the table, there is a detailed view of the selected workflow item, including fields for Source, Originator, Constituent, SSIC#, Subject, Action To, Action Type, Due back to Command by, Command Org, Comments, Attachments, Documents, and Roles.

2. Click "OK" to acquire ownership of the workflow.



3. You have now acquired ownership of this workflow and will come to the following window.

USCG Congressional - 826543 in Divisional Action - The Honorable UNCLASSIFIED Internet Explorer 9

USCG Congressional - 826543 in Divisional Action - The Honorable Peter J. Visclosky (ASSIGNED TO: ERICA MACK)

HOUSE COMMITTEE ON APPROPRIATIONS
 108th Member of Congress
 109th Member of Congress
 110th Member of Congress
 111th Member of Congress
 Democrat

U.S. House of Representatives, 2256 Rayburn House Office Building, Washington, DC 20515 (B)
 2256 Rayburn Hob, Washington, DC 20515-4324 (H)
 (202) 225-2461 (B) (Primary) (202) 225-2493 (FAX) (Primary) 219-795-1844 (H) (Primary)

General Steps People Contacts Attachments Links Documents Discussion

Actions

Search this Record

Sort by Date Asc

Workflow Status: OPH opened by MARGARET ANDERSON on 5/15/2009 at 10:15 AM Assigned to ERICA MACK

Due: 6/1/2009 4:00 PM Step Due: Codes: USCG-CONG, USCG-PSC, USCG-PSC-HRA

Remind: Priority: 9 Closed: Comments: Due to PSC Commander NLT May 28. tib

Data Fields

Letter Information Due Dates Command Due Dates Legal Clearance Cleared & Signed

*Corr. Date: 05/14/2009 *Received Date: 05/15/2009 *Action Date: 05/15/2009

*Source: House *Originator: Peter Visclosky Constituent: Joshua Mosca

External #: C826543 *SSIC #: 5730

*Subject: Constituent is writing regarding her sons discharge and misguidance from the Coast Guard

Keywords:

*Action To: CG-PSC *Action Type: Direct Reply/Comeback Copy Extention Date:

Info To: Coordinate With:

Legal Clearance Needed:

Done Trusted sites

4. The action office should review the attached inquiry to determine if the inquiry was properly assigned or to determine which office the inquiry should be forwarded to (outside of ECT).

- Review the command due date by selecting the “Command Due Dates” tab. The date displayed is the date the action office must complete the response to the inquiry and forward to the front office for review and signature.

5. To view the workflow history scroll down to the bottom of the page.

USCG Congressional - 826543 in Divisional Action - The Honorable Peter J. Visclosky (ASSIGNED to: ERICA MACK)

HOUSE COMMITTEE ON APPROPRIATIONS
108th Members of Congress
109th Members of Congress
110th Members of Congress
111th Members of Congress
Democrat
U.S. House of Representatives, 2256 Rayburn House Office Building, Washington, DC 20515 (B)
2256 Rayburn Hob, Washington, DC 20515-4324 (H)
(202) 225-2461 (B) (Primary) (202) 225-2483 (FAX) (Primary) 219-795-1844 (F) (Primary)

General Steps People Contacts Attachments Links Documents Discussion

Actions

Search this Record

Sort by Date Asc

Workflow Status OPEN Opened by MARGARET ANDERSON on 5/15/2009 at 10:15 AM Assigned to ERICA MACK

Due 5/1/2009 4:00 PM Step Due Codes USCG-CONG
USCG-PSC
HIS/FA-PSC-HRA

Remind Priority 9 Closed

Comments Due to PSC Command NLT May 28 tlb

Data Fields

Letter Information Due Dates **Command Due Dates** Legal Clearance Cleared & Signed

Due back to Command by: 05/28/2009 Command Org: CG-PSC

Due back to Divisional by: Divisional Org:

Due back to Regional/Branch by: Regional/Branch Org:

Workflow Notes

Scan & Initial Entry - Started 05/15/2009 10:15 AM - Completed 05/15/2009 11:30 AM by RAQUEL CONDON

MARGARET ANDERSON 05/15/2009 10:15 AM
Workflow Record Security Automatically Applied by Template.

MARGARET ANDERSON 05/15/2009 10:18 AM
Attached File Visclosky-Mosca PDF

MARGARET ANDERSON 05/15/2009 10:20 AM
Reassigned Ownership to USCG00CONG.

RAQUEL CONDON 05/15/2009 11:29 AM
Due Date changed from '5/1/2009 10:15 AM' to '5/1/2009 4:00 PM'.

RAQUEL CONDON 05/15/2009 11:29 AM
Edited Workflow Record Security

RAQUEL CONDON 05/15/2009 11:30 AM
This Step was Completed on 5/15/2009 11:30 AM by RAQUEL CONDON and Queued to Group(s): USCG_PSC.

Command Action - Started 05/15/2009 11:30 AM - Completed 05/18/2009 03:44 PM by TINA BARBEE

RAQUEL CONDON 05/15/2009 11:30 AM
ROUTING NOTE, with ALERT(s), for Group(s): USCG_PSC: Constituent is writing regarding her sons discharge and misconduct from the Coast Guard

TINA BARBEE 05/15/2009 01:12 PM
Acquired Ownership.

TINA BARBEE 05/18/2009 03:40 PM
Edited Workflow Record Security

TINA BARBEE 05/18/2009 03:42 PM
Attached Document Record - 826543_Visclosky-Mosca.doc.

TINA BARBEE 05/18/2009 03:44 PM
This Step was Completed on 5/18/2009 3:44 PM by TINA BARBEE and Queued to User(s): ERICA MACK, LAWRENCE LAWSON.

Divisional Action - Started 05/18/2009 03:44 PM

ERICA MACK 05/20/2009 02:08 PM
Acquired Ownership.

Reviewing Inquiry attachments

1. Select "Attachment" tab to view the assigned inquiry.

The screenshot shows a web browser window displaying a record for "USCG Congressional - 826543 in Divisional Action - The Honorable Peter J. Visclosky". The page is titled "UNCLASSIFIED" and is assigned to ERICA MACK. The record details include the House Committee on Appropriations, 108th, 109th, 110th, and 111th Members of Congress, and the Democrat party. The address is U.S. House of Representatives, 2256 Rayburn House Office Building, Washington, DC 20515 (B). The phone number is (202) 225-2481 (B) (Primary) and the fax number is (202) 225-2493 (FAX) (Primary). The email number is 219-795-1844 (H) (Primary). The "Attachments" tab is selected, and a table lists one attachment: "1 Visclosky-Mosca.PDF" with a date of 05/15/2009 10:18 AM, scanned and initialed by MARGARET ANDERSON. The "Actions" menu on the left includes options like "Add WF Note", "Add Step Note", "Mail Primary", "Send Info Copy", "Complete Step Release", "Attach File", "Detach File", "Check In as Document", "Scan", "Download Files", "Save", "Close", "Find/Add Person", "History", "Audit Level(2)", "Monitor", "Record Security", and "Step Help".

Drafting the Response: Opening and Editing the Letter: Check In/Check Out

1. Select the "Documents" tab to view the saved template.
2. To complete the document in ECT open the template by clicking the name of the document.

The screenshot shows the same record page as above, but with the "Documents" tab selected. The table lists one document: "1 Document" with version 1, titled "826543_Visclosky-Mosca.doc". The "Actions" menu on the left includes options like "Check In", "Attach Document", "Attach New Document", "Attach New Form Letter", "Detach Document", "Download Files", "Save", "Close", "Find/Add Person", "History", "Attach Mail", "Detach Mail", "Attach Efile", "Scan", "Audit Level(2)", "Monitor", "Record Security", and "Step Help".

- This brings up the Approved Form Letter template window. Click on the “Checked Out letter” link on the action menu on the left. This will take you to the letter template in MS Word.

UNCLASSIFIED

Draft Document - 826543_Visclosky-Mosca.doc (v1)

General | Status Log | Discussion

Actions:
 Add Workflow
 Attach Workflow
 Copy
 Delete
 View Document
 View PDF
 View Pending
 Mail
 Make New Version
 Check Out Document
 Return to Workflow
 Save
 Save and Close
 Close
 Record Security History

Document ID: 827565
 Created By: TINA BARBEE
 Created Date: 5/18/2009 3:42 PM
 Document Name: 826543_Visclosky-Mosca.doc
 Type: Document
 Assigned To: TINA BARBEE

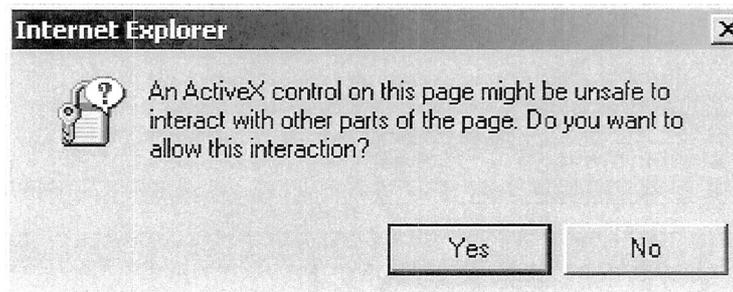
Parent ID: 827565
 Version #: 1 Size: 120920
 Revised Date: 5/18/2009 3:42 PM
 Review Date:
 Expired Date:

Directory: USCG
 Status: Draft Track Change: Manual
 Description:
 Document Codes:

Attached Workflows

#	ID	Step Status	Template	Assigned To	Workflow Due Date	Priority
1	826543	OPEN	USCG Congressional	ERICA MACK	6/1/2009 4:00:00 PM	9

- Click “Yes” to the ActiveX Control message. Make changes to the template as necessary.



Note: When the document is checked out, the “Checked Out by...” will appear at the top of the page.

Documents - Microsoft Internet Explorer provided by United States UNCLASSIFIED

Draft Document - 826543_Visclosky-Mosca.doc (v1)

General | Status Log | Discussion

Checked Out by ERICA MACK

Document ID: 187966
 Created By: TINA BARBEE
 Created Date: 5/18/2009 3:42 PM
 Document Name: 826543_Visclosky-Mosca.doc
 Type: Document
 Assigned To: TINA BARBEE

Parent ID: 187966
 Version #: 1 Size: 120320
 Revised Date: 5/18/2009 3:42 PM
 Review Date:
 Expired Date:

Directory: USCG
 Status: Draft Track Change: Manual
 Description:
 Document Codes:

Attached Workflows

#	ID	Step Status	Template	Assigned To	Workflow Due Date	Priority
1	826543	OPEN	USCG Congressional	ERICA MACK	6/1/2009 4:00:00 PM	9

Note: Upon checking the letter back in the “Checked out by...” will disappear.

Documents - Microsoft Internet Explorer provided by United States UNCLASSIFIED

Draft Document - 826543_Visclosky-Mosca.doc (v1)

General | Status Log | Discussion

Document ID: 187966
 Created By: TINA BARBEE
 Created Date: 5/18/2009 3:42 PM
 Document Name: 826543_Visclosky-Mosca.doc
 Type: Document
 Assigned To: TINA BARBEE

Parent ID: 187966
 Version #: 1 Size: 120320
 Revised Date: 5/18/2009 3:42 PM
 Review Date:
 Expired Date:

Directory: USCG
 Status: Draft Track Change: Manual
 Description:
 Document Codes:

Attached Workflows

#	ID	Step Status	Template	Assigned To	Workflow Due Date	Priority
1	826543	OPEN	USCG Congressional	ERICA MACK	6/1/2009 4:00:00 PM	9

Complete Step and forward for CG PSC Approval

1. Now the drafted response is ready routing up the chain through the approval process. Navigate to the workflow's "General" tab. Review/approval will happen through the Complete Step process.

USCG Congressional - 826543 in Divisional Action - The Honorable Peter J. Visclosky (ASSIGNED to: ERICA MACK)

HOUSE COMMITTEE ON APPROPRIATIONS
109th Members of Congress
109th Members of Congress
110th Members of Congress
111th Members of Congress
Democrat
U.S. House of Representatives, 2256 Rayburn House Office Building, Washington, DC 20515 (B)
2256 Rayburn Hob, Washington, DC 20515-4324 (H)
(202) 225-2461 (B) (Primary) (202) 225-2493 (FAX) (Primary) 219-795-1844 (H) (Primary)

General Steps People Contacts Attachments Links Documents Discussion

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Sort by Date Asc

Workflow Status: OPEN Opened by MARGARET ANDERSON on 5/15/2009 at 10:16 AM Assigned to ERICA MACK

Due	Step Due	Codes
6/1/2009 4:00 PM	5/15/2009	USCG-CONG USCG-PSC USCG-PSC-HRA

Remind Priority 9 Closed

Comments Due to PSC Commander NLT May 29. tlb

Data Fields

Letter Information Due Dates Command Due Dates Legal Clearance Cleared & Signed

*Corr. Date: 05/14/2009 *Received Date: 05/15/2009 *Action Date: 05/15/2009
*Source: House *Originator: Peter Visclosky Constituent: Joshua Mesca
External #: CG26543 *SSIC #: 5730
*Subject: Constituent is writing regarding her sons discharge and misguidance from the Coast Guard
Keywords:
*Action To: CG-PSC *Action Type: Direct Reply/Comeback Copy Extension Date:
Info To: Coordinate With:
Legal Clearance Needed:

2. Select the "Cleared and Signed" tab to record who signed the response. Enter the name of the signing official, organization and date. The name of the signing official must be filled in to be able to complete the step.

USCG Congressional - 826543 in Divisional Action - The Honorable Peter J. Visclosky (ASSIGNED to: ERICA MACK)

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General Steps People Contacts Attachments Links Documents Discussion

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Due	Step Due	Codes
6/1/2009 4:00 PM	5/15/2009	USCG-CONG USCG-PSC USCG-PSC-HRA

Remind Priority 9 Closed

Comments Due to PSC Commander NLT May 29. tlb

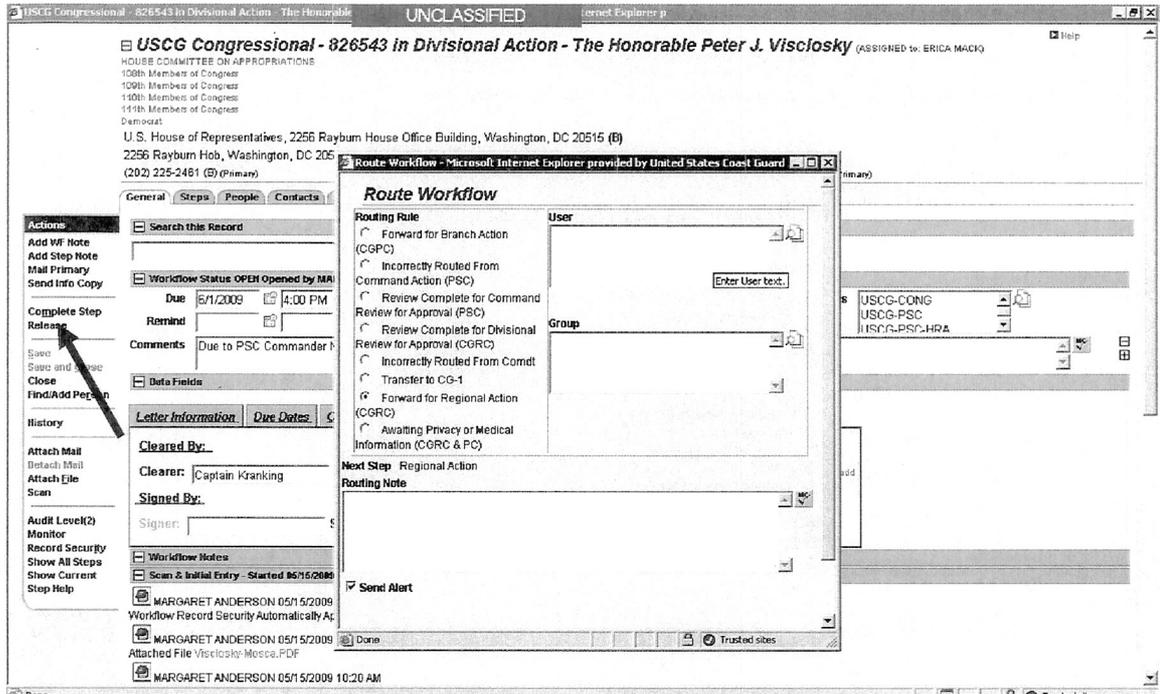
Data Fields

Letter Information Due Dates Command Due Dates Legal Clearance Cleared & Signed

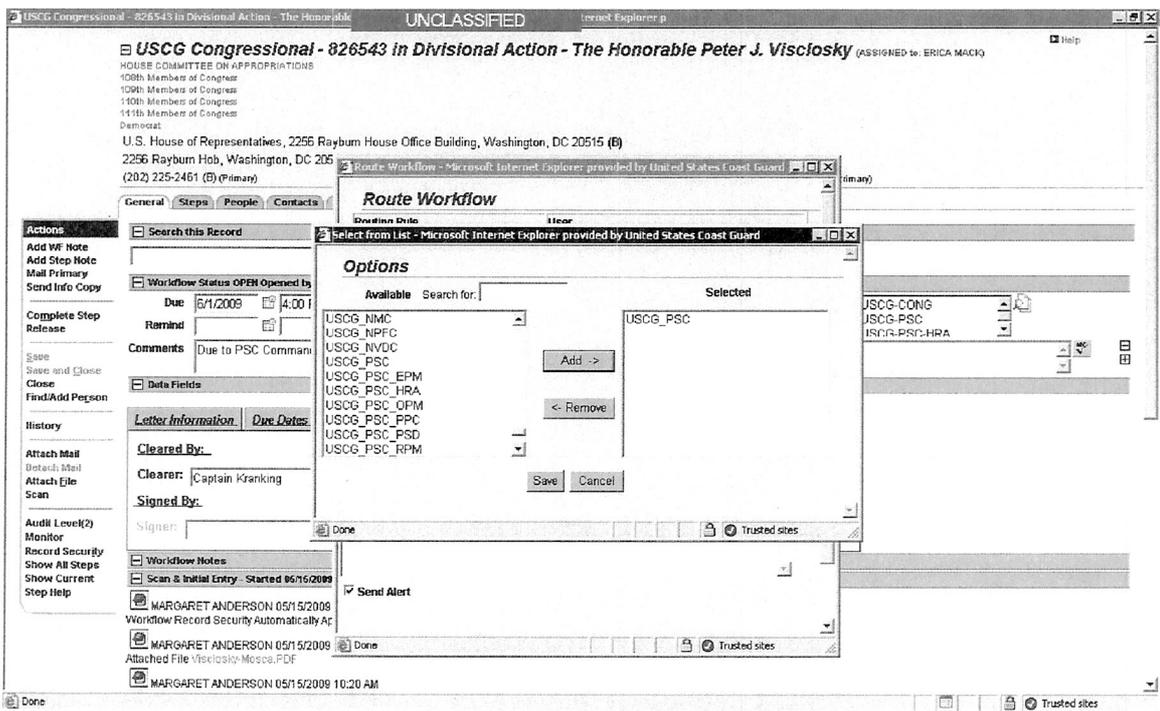
Cleared By:
Clearer: Captain Kranking Clearing Organization: PSC-PSC Date Cleared: 05/21/2009
Signed By:
Signer: Signing Organization Date Signed:

Workflow Notes
Scan & Initial Entry - Started 05/15/2009 10:16 AM - Completed 05/15/2009 11:38 AM by RAQUEL CONDON
MARGARET ANDERSON 05/15/2009 10:15 AM
Workflow Record Security Automatically Applied by Template
MARGARET ANDERSON 05/15/2009 10:18 AM
Attached File Visclosky-Mesca.PDF
MARGARET ANDERSON 05/15/2009 10:20 AM

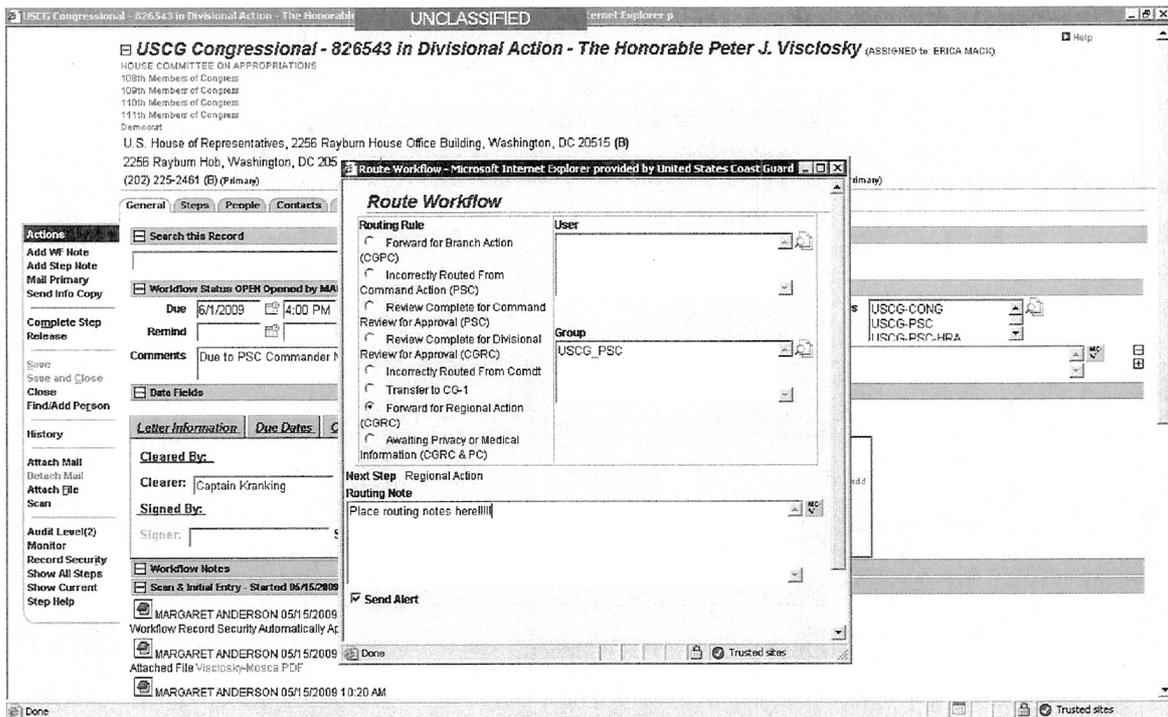
3. Select "Complete Step" to route the workflow to the front office. The "Route Workflow" box will then be displayed.
4. Select the group (click on the icon to the right) and locate USCG-PSC.



5. Add USCG-PSC and save.

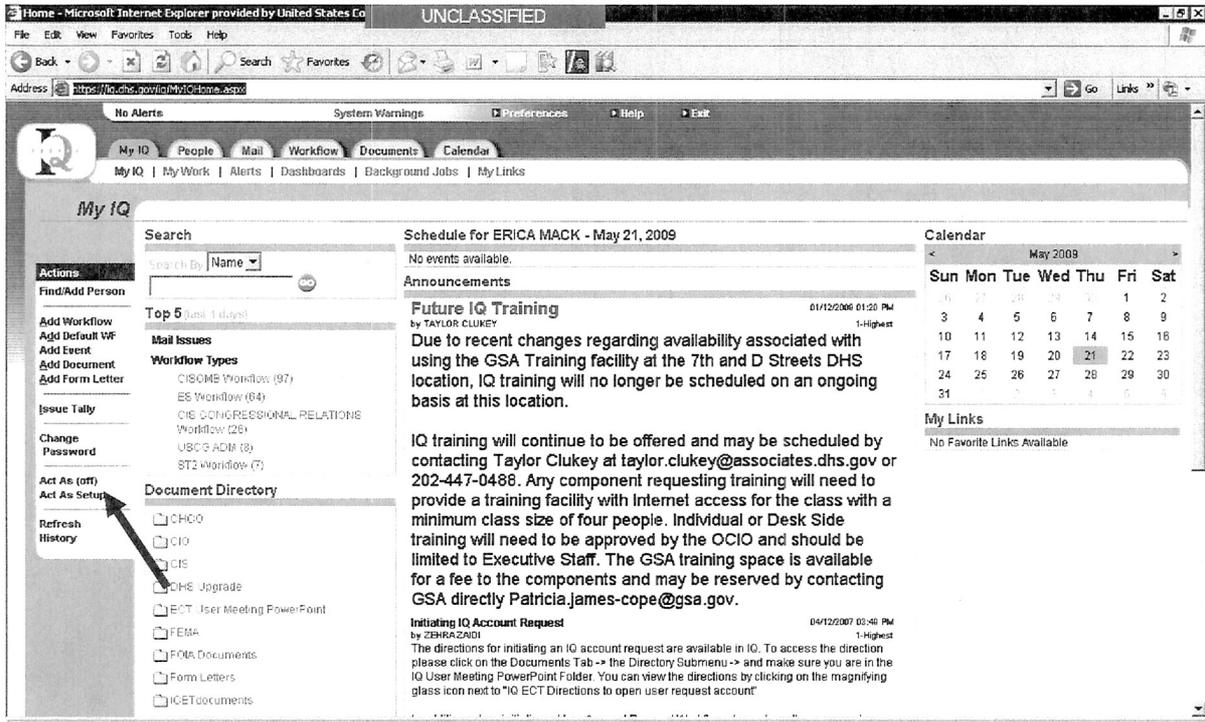


6. Add a note in the “Route Workflow” window specifying desired action. Ensure “Send Alert” box is checked and select the box to the left that reads “Review Complete for Command Review for Approval (PSC)”. Save and you are complete with the workflow (you no longer have ownership of the workflow).

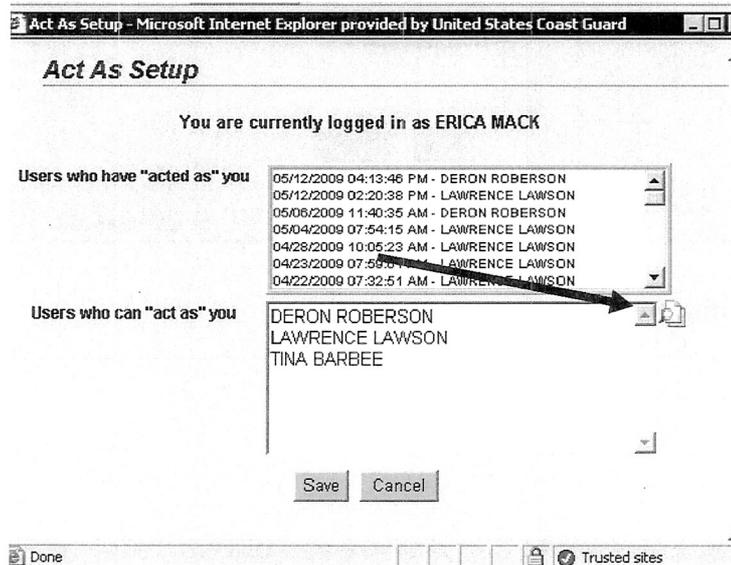


Setting Up “Act As”

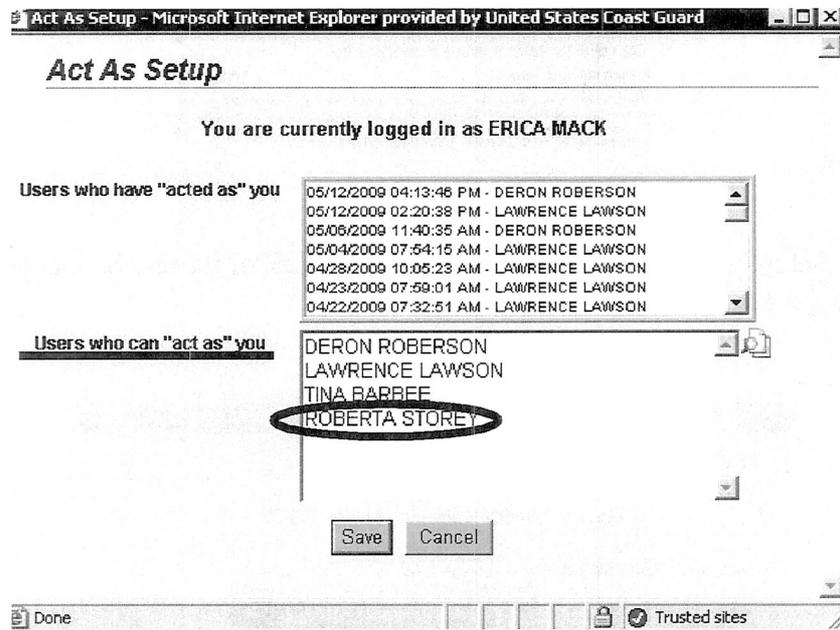
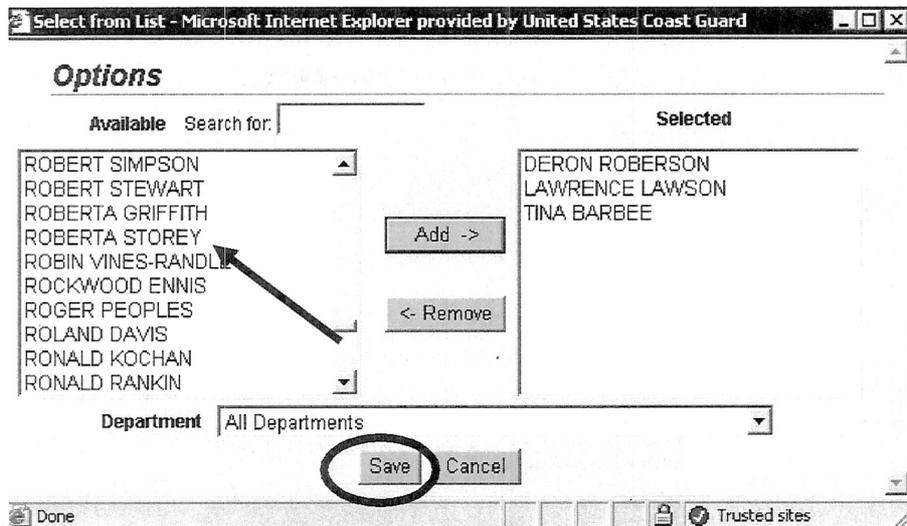
1. From My IQ Home Page, Select “Act As Set Up” from the action menu.



2. In the “Act As Setup” dialog window, enter the user names of those who can act as you or use the search icon to get a list of users.



3. Once you locate the names you want to add to act as you, click "Save".



4. Click "Save" to complete.