

PHS Dual Status Accession User Guide



Version 1.0

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NEW PHS OFFICER: FIRST ASSIGNMENT TO THE COAST GUARD

Introduction This section provides procedures for:

- A new PHS Officer whose first assignment is to the Coast Guard and you need to issue them orders before the start date, and
- The PHS member does not exist in Direct Access

Since PHS CG orders are cut in DA and can only be done for CG employment records, you must manually add the CG employment record in DA. Additionally, the order must be assigned to the member prior to the actual start date. Therefore, you will have to add this CG employment record in DA prior to the new hire's actual start date.

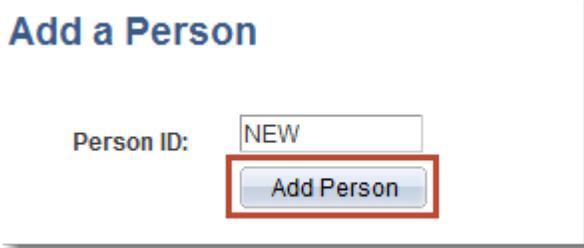
The PHS employment record will automatically be created in DA via the new hire interface. If the interface detects that the new hire already exists in DA, the PHS employment record will be added to the emplID created when you added CG employment record. If the new hire does not already exist in DA, the interface will create a new emplID and PHS employment record in DA for the new hire.

Menu Path(s) Menu Navigation: Workforce Administration > Personal Information > Biographical > Add A Person

Need Help? If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- The web address for support is <http://www.uscg.mil/ppc/ccb/>. There is a link to Customer Care at the bottom of every page of this help file.
 - Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
 - Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)
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Procedure The following steps will show you how to add a Coast Guard employment record in DA.

Step	Action
1	<p>Using the menu navigation, click on Develop Workforce > Personal Information > Biographical > Add a Person</p> 
2	<p>On the Add a Person page, click the Add Person button. DO NOT enter an EmplID or Empl Rcd Nbr. .</p>  <p> The emplID and Empl Rcd Nbr will be automatically generated and assigned to the new hire when the new hire record is saved.</p>
3	<p>On the Biographical Details page, click 'Add Name' in the Name section and enter the new hire's name. Then click 'Ok'. Enter/select any other relevant data. All fields marked with an * are required fields.</p>

Step Action

The screenshot shows a web form for a 'Test Newhire' with the following sections:

- Biographical Details:** Includes tabs for 'Biographical Details', 'Contact Information', 'Regional', and 'Organizational Relationships'. Fields include Name, Effective Date (01/02/2015), Format Type (English), and Display Name (Test Newhire).
- Biographic Information:** Fields include Date of Birth (01/01/1985), Birth Country (USA), Birth State (DC), and Birth Location.
- Biographical History:** Fields include Effective Date (01/02/2015), Gender (Female), Highest Education Level (I-Master's Level Degree), Marital Status (Single), and Language Code.
- National ID:** A table with columns for Country, National ID Type, National ID, and Primary ID. One entry is shown for USA with Social Security Number 376-54-2135.

 All effective dates should be prior to the actual hire date and, in most cases, you should use the date you are doing this hire as the effective date. If the actual hire date is used, the orders will not be able to be created until on or after the hire date.

Click the **Contact Information** tab.

- 4 On the Contact Information page, click 'Add Address Detail' in the Current Addresses section.

The screenshot shows a table titled 'Current Addresses' with columns: Address Type, As Of Date, Status, and Address. A single row is visible with 'Home' in the Address Type column. An 'Add Address Detail' button is highlighted with a red box in the bottom right corner of the table.

On the Address History page, click the 'Add Address'.

The screenshot shows the 'Address History' form with fields for Effective Date (01/02/2015), Country (USA), and Status (A). An 'Add Address' button is highlighted with a red box at the bottom of the form.

Step Action

On the 'Edit Address' page enter the new hire's address then click 'Ok' and again on the Address History page.

Edit Address

Country: United States

Address 1:

Address 2:

Address 3:

City: State: District of Columbia

Postal:

County:

To enter another address, click the + icon to insert a row. In the new row, select the Address Type and follow the steps above to enter address details.

Current Addresses				
Address Type	As Of Date	Status	Address	
Home	01/02/2015	A	Test Street Test City DC 11111	Edit/View Address Detail <input type="button" value="+"/> <input type="button" value="-"/>
<input type="text"/>				Add Address Detail <input type="button" value="+"/> <input type="button" value="-"/>

The system automatically inserts a 'Home' address row. You must indicate an address for this address type. Other address types (e.g. mailing) can be added.

Enter/select any other relevant data. If you enter one or more phone, the 'Preferred' checkbox must be selected for one. Business email address is updated automatically. All others email address types can be added via self-service.

Step Action

Click the **Regional** tab.

5 On the Regional page, select the new hire’s race. Insert a row by clicking the + icon and select the new hire’s ethnicity. Enter/select any other relevant data.

Click the **Organizational Relationships** tab.

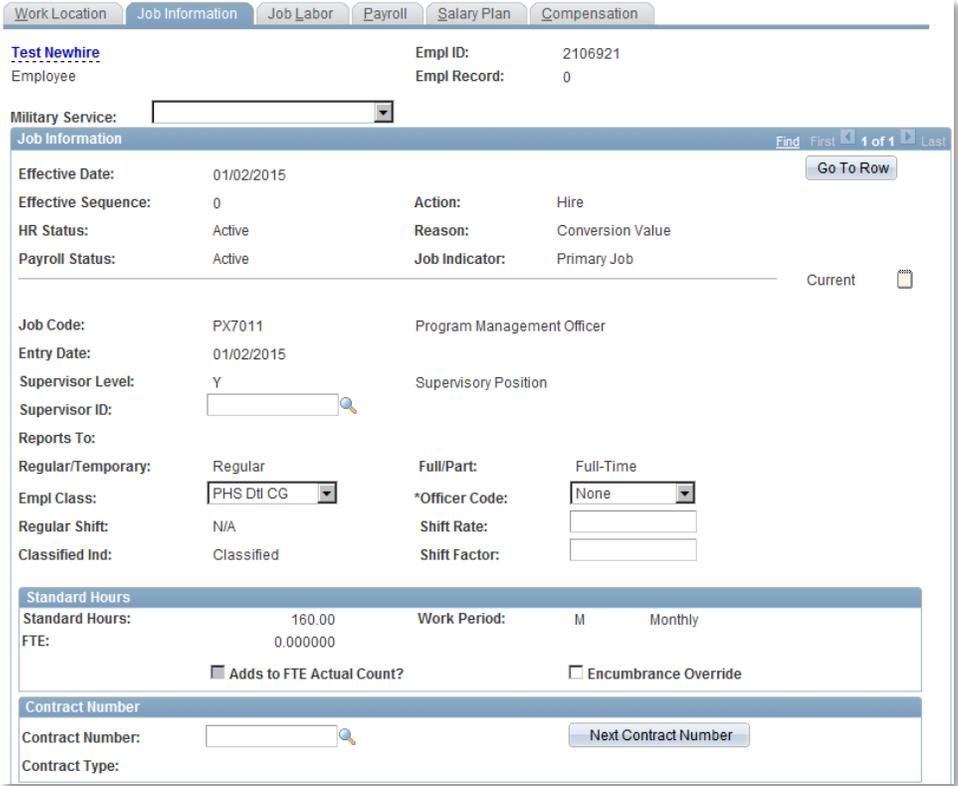
6 On the Organizational Relationships page, select the Employee checkbox and click the Add Relationship button. You will then be taken to the Job Data component.

Step Action

 Do not select any other checkbox. Doing so will prevent orders from being cut for the member.

7 On the Work Location page, select/enter the Effective, Job Indicator, and Position Number. The remaining fields will default after the position number is entered. Leave Action = Hire. Select an Establishment ID if one does not default. If position number is not known, you must enter/select values for each field.

 All effective dates should be prior to the actual hire date and, in most cases, you should use the date you are doing this hire as the effective date. If the actual hire date is used, the orders will not be able to be created until on or after the hire date.

Step	Action
	<p> Click the Override Position Data button if you need to change any of the position default fields (e.g. department, location, etc).</p> <p>Click the Job Information tab.</p>
8	<p>On the Job Information page, select Empl Class = PHS Dtl CG.</p>  <p>The screenshot shows the 'Job Information' tab selected. Key fields include: <ul style="list-style-type: none"> Employee: Test Newhire Empl ID: 2106921 Empl Record: 0 Effective Date: 01/02/2015 Effective Sequence: 0 HR Status: Active Payroll Status: Active Job Code: PX7011 Entry Date: 01/02/2015 Supervisor Level: Y Regular/Temporary: Regular Empl Class: PHS Dtl CG (selected) Regular Shift: N/A Classified Ind: Classified Action: Hire Reason: Conversion Value Job Indicator: Primary Job Program Management Officer Supervisory Position Full/Part: Full-Time *Officer Code: None Shift Rate: [empty] Shift Factor: [empty] Standard Hours: 160.00 FTE: 0.000000 Work Period: M Monthly Contract Number: [empty] </p> <p>Click the Job Labor tab.</p>
9	<p>On the Job Labor page, select a Labor Agreement and enter any relevant dates in the Assigned Seniority Dates section.</p>

Step Action

Bargaining Unit:

Labor Agreement: Officer and Warrant Officer

Labor Agreement Entry Dt:

Employee Category:

Employee Subcategory:

Employee Subcategory 2:

Position Management Record

Union Code: Y

Union Seniority Date:

Works Council ID:

Labor Facility ID:

Entry Date:

Stop Wage Progression

Pay Union Fee

Exempt from Layoff Reason:

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
ACTIVE DUTY BASE DATE		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
AD PAY SCALE DATE		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
DEP DATE		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
CMA DATE		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
COMMISSION DATE		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
CURRENT AD DATE		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Click the **Benefits Program Participation** link. There is nothing to enter on the Payroll, Salary Plan, Compensation, and Employment Data pages. These can be skipped.

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On the Benefits Program Participation page, select Benefits System = Base Benefits. In the Benefits Program Participation section, if the effective date is different than the effective date on the Work Location page, change it to match the Work Location effective date. Select Benefit Program = ACG.

Benefit Status

Benefit Record Number: [Go To Row](#)

Effective Date: 01/02/2015

Effective Sequence: 0 Action: Hire

HR Status: Active Reason: Conversion Value

Payroll Status: Active Job Indicator: Primary Job

*Benefits System: Benefits Employee Status: Active

Annual Benefits Base Rate: USD

Benefits Administration Eligibility

BAS Group ID:

Elig Fld 1: Elig Fld 2: Elig Fld 3:

Elig Fld 4: Elig Fld 5: Elig Fld 6:

Elig Fld 7: Elig Fld 8: Elig Fld 9:

Benefit Program Participation

*Effective Date: Currency Code: USD

*Benefit Program: CG/NOAA Active Deduction Prog

[Job Data](#) [Employment Data](#) [Benefits Program Participation](#)

Step	Action
	Click the Ok button. Upon save, you may receive several warning messages. Click Ok for each message. An emplID will then be assigned.
11	Take note of the Name, emplID, Empl Rcd#, and Position # and email to the Assignments Officer (Detailer).

EXISTING PHS OFFICER: FIRST ASSIGNMENT TO THE COAST GUARD

Introduction This section provides procedures for:

- An existing PHS Officer who is assigned to the Coast Guard for the first time, and
- Already has an emplID in Direct Access (DA) and a PHS employment record but no CG employment record.

In this scenario, the member's PHS employment record already exists in Direct Access (DA), but a CG employment record will have to be added since the member is being assigned to the Coast Guard for the first time. Since CG assignment orders are created in DA and can only be done for CG employment records, the new hire must have a CG employment record DA.

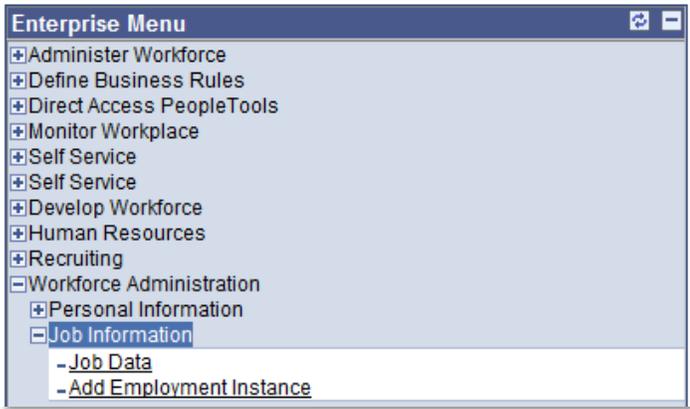
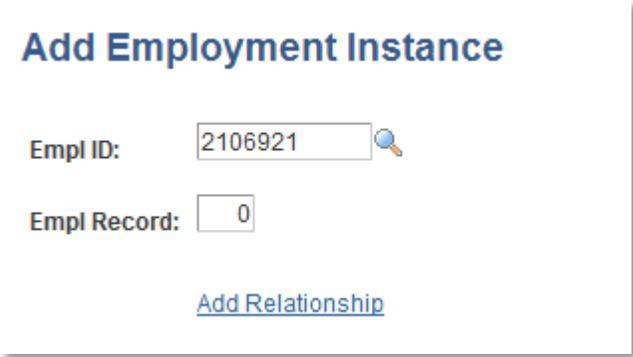
Additionally, the order must be assigned to the member prior to the actual start date. Therefore, you will have to add this CG employment record in DA prior to the new hire's actual start date.

Menu Path(s) Menu Navigation: Workforce Administration > Job Information > Add Employment Instance

Need Help? If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

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Procedure The following steps will show you how to add a CG employment record in DA.

Step	Action
1	<p>Using the menu navigation, click on Workforce Development > Job Information > Add Employment Instance</p> 
2	<p>On the Add A New Value page, enter the member's emplID. DO NOT enter Empl Rcd Nbr. The system will automatically increase the Empl Rcd Nbr accordingly.</p>  <p>Click the Add Relationship button.</p> <p> If the member's emplID is unknown, navigate to Job Data and search for the person to get their emplID. Once you have identified the correct emplID, return to this step.</p>
3	<p>On the Work Location page, select/enter the Effective, Job Indicator, and Position Number. The remaining fields will default after the position number is entered. Leave Action = Hire. Select an Establishment ID if one does not default. If position number is not known, you must enter/select values for each field.</p>

Step	Action
	<div data-bbox="289 275 1230 961" style="border: 1px solid gray; padding: 5px;"> <p>Work Location Job Information Job Labor Payroll Salary Plan Compensation</p> <p>Test Newhire Empl ID: 2106921 Employee Empl Record: 1</p> <p>Military Service: <input type="text"/></p> <p>Work Location: <input type="text"/> Find First 1 of 1 Last Go To Row + -</p> <p>*Effective Date: <input type="text" value="01/02/2015"/> *Action: <input type="text" value="Hire"/> Effective Sequence: <input type="text" value="0"/> Reason: <input type="text" value="Conversion Value"/> HR Status: Active *Job Indicator: <input type="text" value="Primary Job"/> Payroll Status: Active <input type="button" value="Calculate Status and Dates"/></p> <hr/> <p>Position Number: <input type="text" value="00004938"/> USPHS LIAISON Current <input type="button" value="Print"/> <input type="button" value="Override Position Data"/></p> <p>Position Entry Date: 01/02/2015 <input type="checkbox"/> Position Management Record</p> <p>Regulatory Region: AD Active Duty Company: ACG Active CG Business Unit: OFFCG Officer CG Department: 007972 COMMANDANT (CG-1122) Department Entry Date: 01/02/2015 Location: DC0019 COMMANDANT Establishment ID: <input type="text"/> Date Created: 01/02/2015</p> <p>Last Start Date: <input type="text" value="01/02/2015"/> Expected Job End Date: <input type="text"/></p> </div> <p> All effective dates should be prior to the actual hire date and, in most cases, you should use the date you are doing this hire as the effective date. If the actual hire date is used, the orders will not be able to be created until on or after the hire date.</p> <p> Click the Override Position Data button if you need to change any of the position default fields (e.g. department, location, etc).</p> <p>Click the Job Information tab.</p>
4	On the Job Information page, select Empl Class = PHS Dtl CG.

Step Action

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Test Newhire Empl ID: 2106921
Employee Empl Record: 1

Military Service: [Dropdown]

Job Information [End] [First] 1 of 1 [Last] [Go To Row]

Effective Date: 01/02/2015
Effective Sequence: 0 Action: Hire
HR Status: Active Reason: Conversion Value
Payroll Status: Active Job Indicator: Primary Job Current [Icon]

Job Code: 000093 Captain
Entry Date: 01/02/2015
Supervisor Level:
Supervisor ID: [Search]
Reports To:
Regular/Temporary: Regular Full/Part: Full-Time
Empl Class: PHS Dtl CG *Officer Code: None
Regular Shift: N/A Shift Rate: [Field]
Classified Ind: Unclassifd Shift Factor: [Field]

Standard Hours

Standard Hours: 160.00 Work Period: M Monthly

Click the **Job Labor** tab.

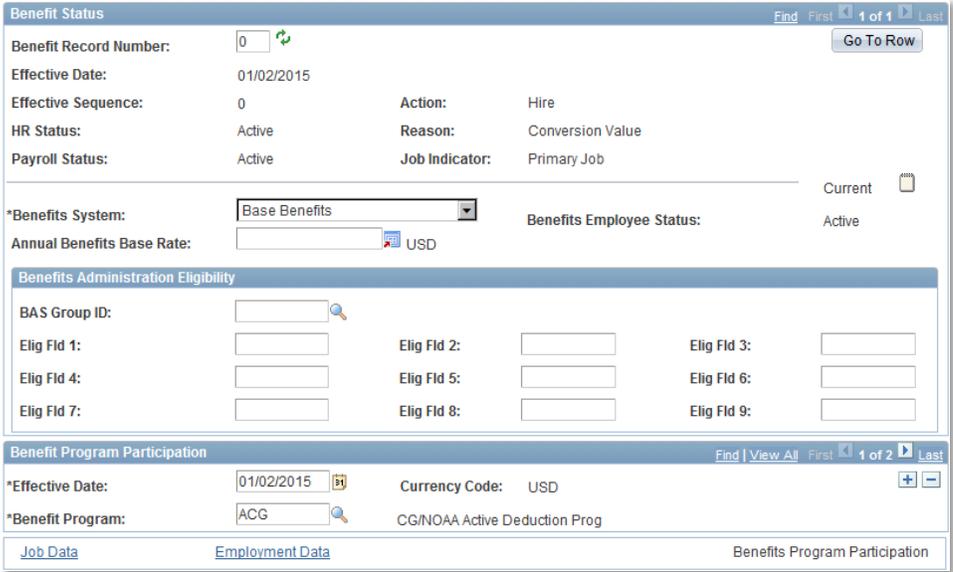
5 On the Job Labor page, select a Labor Agreement and enter any relevant dates in the Assigned Seniority Dates section.

Bargaining Unit: [Search]
Labor Agreement: OFF Officer and Warrant Officer
Labor Agreement Entry Dt: 01/02/2015 [Calendar]
Employee Category: [Search]
Employee Subcategory: [Search]
Employee Subcategory 2: [Search]
 Position Management Record
Union Code: Y
Union Seniority Date: [Calendar]
Works Council ID:
Labor Facility ID: [Search]
Entry Date: [Calendar]
 Stop Wage Progression
 Pay Union Fee
 Exempt from Layoff Reason: [Search]

Assigned Seniority Dates [Customize] [Find] [View 5] [First] 1-15 of 15 [Last]

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
ACTIVE DUTY BASE DATE		[Calendar]	<input type="checkbox"/>	[Field]
AD PAY SCALE DATE		[Calendar]	<input type="checkbox"/>	[Field]
DEP DATE		[Calendar]	<input type="checkbox"/>	[Field]
CMA DATE		[Calendar]	<input type="checkbox"/>	[Field]
COMMISSION DATE		[Calendar]	<input type="checkbox"/>	[Field]
CURRENT AD DATE		[Calendar]	<input type="checkbox"/>	[Field]

Click the **Benefits Program Participation** link. There is nothing to enter on the Payroll,

Step	Action
	Salary Plan, Compensation, and Employment Data pages. These can be skipped.
6	<p>On the Benefits Program Participation page, select Benefits System = Base Benefits. In the Benefits Program Participation section, if the effective date is different than the effective date on the Work Location page, change it to match the Work Location effective date. Select Benefit Program = ACG.</p>  <p>Click the Ok button. Upon save, you may receive several warning messages. Click Ok for each message.</p>
7	Take note of the Name, EmplID, Empl Rcd#, and Position # and email to the Assignments Officer (Detailer).

EXISTING PHS OFFICER: REASSIGNED TO THE COAST GUARD

Introduction This section provides procedures for:

- A PHS Officer whose was formerly assigned to the Coast Guard,
- Is being reassigned to the Coast Guard, and
- Already have a PHS and an inactive CG employment record.

In this scenario, the member has an existing PHS employment with a CG employment record whose status is inactive from a prior CG assignment. If the member is being reassigned to the Coast Guard, a 'rehire' will have to be performed on the member's existing CG employment record. The member must be detached (terminated) from the prior CG assignment and the current status for the CG employment record must be inactive. If this is not the case then please contact Customer Care at <http://www.uscg.mil/ppc/ccb/>.

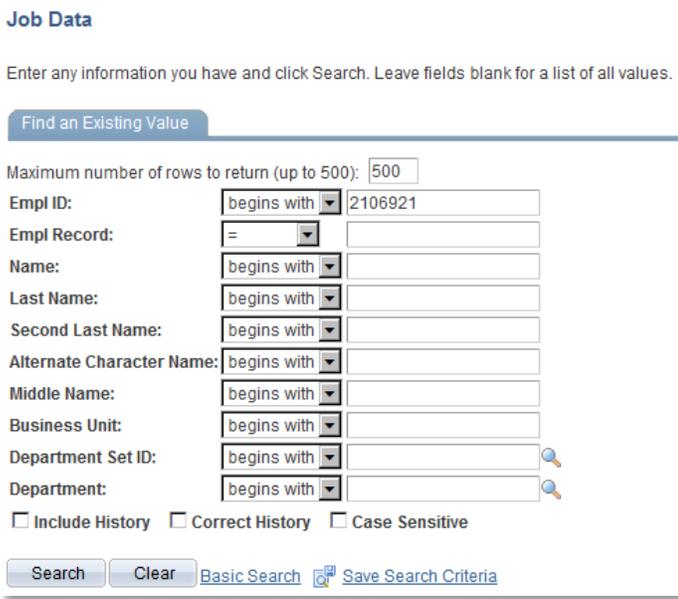
Additionally, the order must be assigned to the member prior to the actual start date. Therefore, you will have to add this 'rehire' row in DA prior to the actual start date.

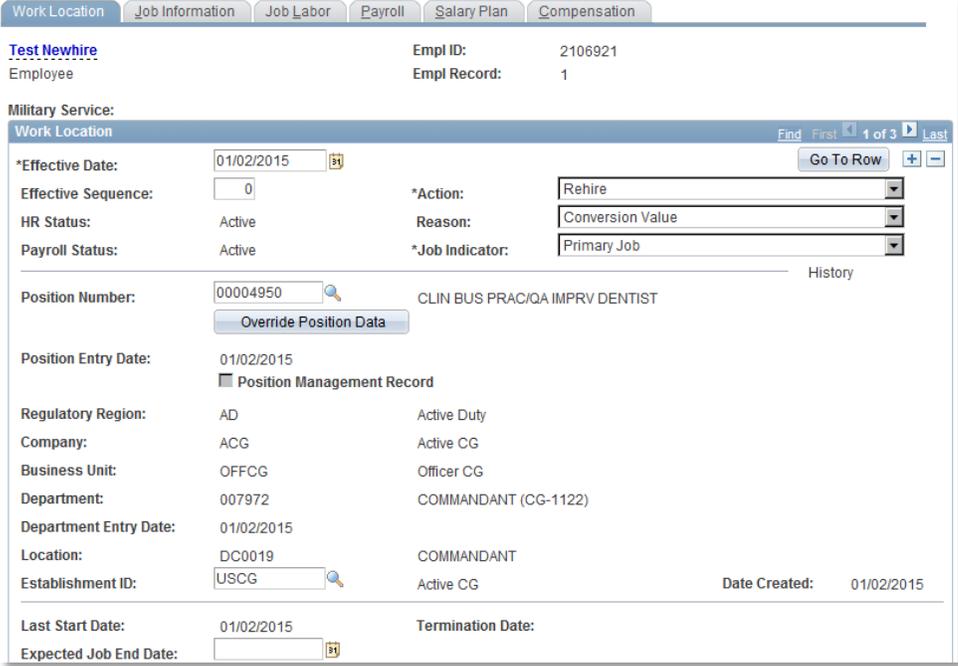
Menu Path(s) Menu Navigation: Workforce Administration > Job Information > Add Employment Instance

Need Help? If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

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 - Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)
-

Procedure The following steps will show you how to 'rehire' a PHS member who was previously assigned and detached from the Coast Guard and is now being reassigned to the Coast Guard.

Step	Action
1	<p>Using the menu navigation, click on Workforce Administration > Job Information > Job Data</p> 
2	<p>On the Find an Existing Value page, search for the member.</p> <p>Job Data</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p>  <p>Click the Search button.</p>
3	<p>The search results will return two employment records: 1) PHS employment record, and 2) CG employment record.</p>  <p>Select the CG employment record (Business Unit = OFFCG).</p>

Step	Action
	<p> The Empl Rcd# for the PHS employment record and CG employment record varies, and depends on when the employment records were entered. In other words, the CG employment record will not always = 0 and the PHS record may not always = 1 as the above screen shot shows.</p>
4	<p>On the Work Location page, insert a row by selecting the  icon.</p> <p>In the new row, select/enter Effective Date, Action = Rehire, Job Indicator, and Position Number. The remaining fields will default after the position number is entered. Select an Establishment ID if one does not default. If position number is not known, you must enter/select values for each field.</p>  <p> All effective dates should be prior to the actual hire date and, in most cases, you should use the date you are doing this hire as the effective date. If the actual hire date is used, the orders will not be able to be created until on or after the hire date.</p> <p> Click the Override Position Data button if you need to change any of the position default fields (e.g. department, location, etc).</p> <p>Click the Job Information tab.</p>
5	<p>On the Job Information page, select Empl Class = PHS Dtl CG.</p>

Step Action

Click the **Job Labor** tab.

6 On the Job Labor page, select a Labor Agreement and enter/update any relevant dates in the Assigned Seniority Dates section.

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
ACTIVE DUTY BASE DATE			<input type="checkbox"/>	
AD PAY SCALE DATE			<input type="checkbox"/>	
DEP DATE			<input type="checkbox"/>	
CMA DATE			<input type="checkbox"/>	
COMMISSION DATE			<input type="checkbox"/>	
CURRENT AD DATE			<input type="checkbox"/>	

Click the **Ok** button. Upon save, you may receive several warning messages. Click Ok for each message. There is nothing to update on the Payroll, Salary Plan, Compensation, Employment Data, and Benefits Program Participation pages. These can be skipped.

Step	Action
7	Take note of the Name, EmplID, Empl Rcd#, and Position # and email to the Assignments Officer (Detailer).