

# **PHS Manually Add/Separate Non-Officer User Guide**



Version 1.0

Prepared by  
Commandant (CG-631)

U.S. Coast Guard  
2703 Martin Luther King Jr. Ave SE  
Washington, DC 20593

**TABLE OF CONTENTS**

---

---

**Manually Add Non-Officer ..... 3**

**Separate Non-Officer ..... 9**

## MANUALLY ADD NON-OFFICER

---

**Introduction** This section provides procedures for adding a PHS non-officer (e.g. civilian) into the Direct Access system. The purpose of adding non-officers into DA is so that they can be assigned a job data record and emplID which are needed for certain functions in Direct Access (e.g. approvals). Non-officer hires do not require approval. However, your DA user ID must have the CG\_PHS\_NONOFF role in order to hire non-officers without approval.

This method cannot be used to hire an officer. Refer to the PHS Officer Accession user guides for officer hires.

---

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

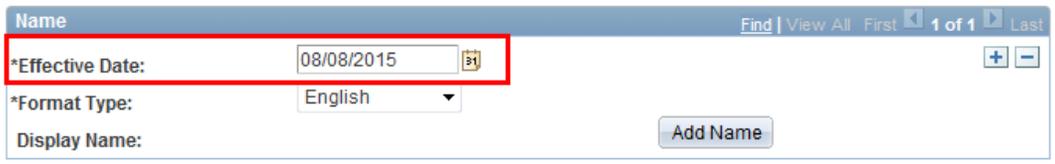
Portal Pagelet: N/A

---

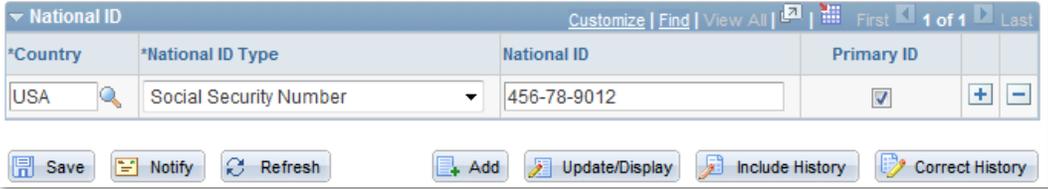
**Need Help?** If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
  - 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/>.)
- 

**Procedure** The following steps will show you how to add a non-officer. All fields with an asterisk (\*) are required fields.

Step	Action
<p>1</p>	<p>In the Enterprise Menu, navigate to: Workforce Administration &gt; Personal Information &gt; <b>Add A Person</b>.</p>  <p><b>i</b> This transaction may be available in the ACCESSIONS portal pagelet based on the level of your access. Both can be used to add a non-officer.</p>
<p>2</p>	<p>On the Add a Person page, click the <b>Add Person</b> button. If needed, use the Search for Matching Persons link to verify if an emplID does or does not already exist for the person.</p>  <p><b>!</b> Do not enter anything in the Person ID field. The system will auto-generate an ID when the non-officer is saved.</p>
<p>3</p>	<p>On the <b>Biographical Details</b> page, enter/select:</p> <ul style="list-style-type: none"> <li>▪ <b>Effective Date</b> = Change default date, if necessary. This date cannot be a future date.</li> <li>▪ <b>Format Type</b> = Select English if it not defaulted.</li> </ul>  <p><b>i</b> All effective dates on the Personal Data pages must match. If one effective date is changed, the system will change all other effective dates to match it.</p>

Step	Action
	Click the <b>Add Name</b> button.
4	<p>On the Edit Name page, enter the person’s name.</p> <div data-bbox="289 380 1333 877" style="border: 1px solid gray; padding: 5px;"> <p><b>English Name Format</b></p> <p>Prefix: <input type="text"/></p> <p>First Name: <input type="text" value="Test"/></p> <p>Middle Name: <input type="text"/></p> <p>Last Name: <input type="text" value="Non-Officer"/></p> <p>Suffix: <input type="text"/></p> <p>Display Name:</p> <p>Formal Name:</p> <p>Name:</p> <p style="text-align: center;"><input type="button" value="Refresh Name"/></p> <p style="text-align: center;"><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/></p> </div> <p> All effective dates on the Personal Data pages must match. If one effective date is changed, the system will change all other effective dates to match it.</p> <p>Click the <b>Ok</b> button.</p>
5	<p>In the Biographical Information section, enter/select:</p> <ul style="list-style-type: none"> <li>▪ <b>Date of Birth</b> = enter the non-officer’s birthdate</li> </ul> <div data-bbox="289 1188 1352 1730" style="border: 1px solid gray; padding: 5px;"> <p><b>Biographic Information</b></p> <p>Date of Birth: <input type="text" value="01/01/1990"/>  25 Years 9 Months</p> <p>Date of Death: <input type="text"/> </p> <p>Birth Country: <input type="text" value="USA"/>  United States</p> <p>Birth State: <input type="text"/> </p> <p>Birth Location: <input type="text"/> <input type="checkbox"/> Waive Data Protection</p> <hr/> <p><b>Biographical History</b> <span style="float: right;">Find   View All First 1 of 1 Last</span></p> <p>*Effective Date: <input type="text" value="10/14/2015"/>  <span style="float: right;">+ -</span></p> <p>*Gender: <input type="text" value="Unknown"/></p> <p>*Highest Education Level: <input type="text" value="A-Not Indicated"/></p> <p>*Marital Status: <input type="text" value="Unknown"/> As of: <input type="text" value="10/14/2015"/> </p> <p>Language Code: <input type="text"/></p> <p>Alternate ID: <input type="text"/></p> <p style="text-align: center;"><input type="checkbox"/> Full-Time Student</p> </div> <p>Birth date is needed for non-officer hires so that a password can be automatically. The auto-generated password includes the birth year of the member. If a birth date is not indicated, a password will not be auto-generated and you must contact PPC to have the</p>

Step	Action
	password set for the non-officer user.
6	<p>In the National ID section, enter/select:</p> <ul style="list-style-type: none"> <li>▪ <b>Country</b> = select USA if not defaulted</li> <li>▪ <b>National ID Type</b> = select Social Security Number</li> <li>▪ <b>National ID</b> = enter the non-officer’s SSN</li> </ul>  <p>SSN is needed for non-officer hires so that a password can be automatically. The auto-generated password includes the last four digits of the member. If an SSN is not indicated, a password will not be auto-generated and you must contact PPC to have the password set for the non-officer user.</p> <p>Click on the <b>Contact Information</b> tab.</p>
7	<p>In the Phone Information section, enter:</p> <ul style="list-style-type: none"> <li>▪ <b>Phone Type</b> = select a value</li> <li>▪ <b>Telephone</b> = enter phone number</li> <li>▪ <b>Extension</b> = enter phone extension, if any</li> <li>▪ <b>Preferred</b> = if multiple phone numbers are entered, one must be selected as preferred.</li> </ul> <p>Click the + icon to add additional phone numbers.</p>  <p>Click the <b>Organizational Relationship</b> tab.</p> <p> No other data is required to save a non-officer. Other data may be indicated at your discretion.</p>
8	<p>On the Organizational Relationships page, select:</p> <ul style="list-style-type: none"> <li>▪ <b>Employee</b> = select checkbox</li> </ul>

**Step Action**

Click the **Add Relationship** button. You will receive warning messages indicating that certain data should be entered for the person you are adding. These are just warning messages and are not required data. Click Ok for each message.

**!** Do not enter or select any other data on this page.

9 On the **Work Location** page, enter/select:

- **Regulatory Region** = NOMIL
- **Company** = PHS
- **Business Unit** = CIVPH
- **Department** = 000001
- **Location** = select 000001 if it did not default after entering the Department
- **Establishment ID** = select 'PHS' if did not default

Click the **Job Information** tab.

**!** Regulatory Regions must be set to 'NOMIL' and Business Unit must be set to 'CIVPH' for a non-officer hire.

**Step Action**

**10** On the **Job Information** page, enter/select:

- **Job Code** = 000001
- **Empl Class** = PHS Civ

The screenshot shows a 'Job Information' form with the following data:

Effective Date:	08/08/2015	Action:	Hire
Effective Sequence:	0	Reason:	Conversion Value
HR Status:	Active	Job Indicator:	Primary Job
Payroll Status:	Active		Current

*Job Code:	000001	Non-Officer Job Code	
Entry Date:	08/08/2015		
Supervisor Level:			
Supervisor ID:			
Reports To:			
*Regular/Temporary:	Regular	*Full/Part:	Full-Time
Empl Class:	PHS Civ	*Officer Code:	None
*Regular Shift:	N/A	Shift Rate:	
		Shift Factor:	

Click the **Ok** button. You will receive warning messages indicating that certain data is missing. These are just warning messages and are not required data. Click Ok for each message.

- No other data is required to save a non-officer. Non-officer hires do not require approval. Therefore, no supervisor ID is required.



- A user ID will be automatically created for the new hire with the following:  
**User ID** = member's emplID  
**Password** = CG<last 4 of SSN>@<birth year> (e.g. CG1234@1990)  
 The new user ID will grant access to non-officer related self-service transactions. Any additional access needed will require a submission of the User Access Request form. If birth year and/or SSN is missing for the non-officer hire, a password will not be auto-generated and you must contact PPC to get the password set.

## SEPARATE NON-OFFICER

---

**Introduction** This section provides procedures for separating a PHS non-officer (e.g civilian) into the Direct Access system. The purpose of separating non-officers in DA is so that their job data record is inactivated which will revoke certain functions in Direct Access (e.g. approvals)

This method cannot be used to separate an officer. Refer to the PHS Separations user guide for officer separations.

---

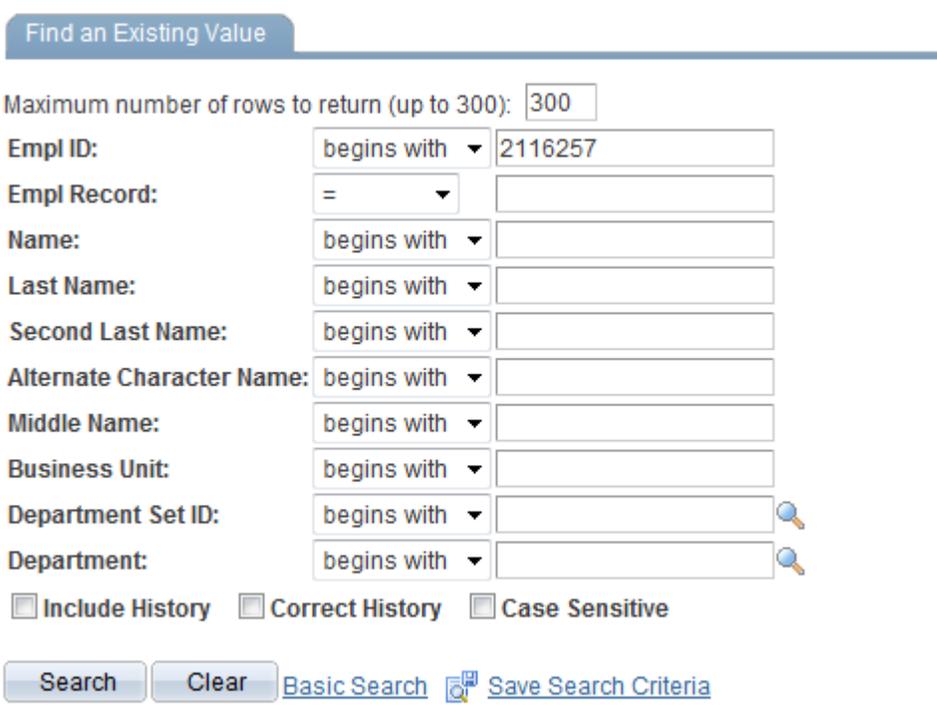
**Menu Path(s)** Menu Navigation: Workforce Administration > Job Information > Job Data  
Portal Pagelet: N/A

---

**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/>.
  - 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/>.)
- 

**Procedure** The following steps will show you how to separate a non-officer. All fields with an asterisk (\*) are required fields.

Step	Action
1	<p>In the Enterprise Menu, navigate to: Workforce Administration &gt; Personal Information &gt; <b>Add A Person</b>.</p>  <p> This transaction may be available in the CORE HR portal pagelet based on the level of your access. Both can be used to separate non-officer.</p>
2	<p>On the Find an Existing Value search page, enter the non-officer’s employee ID in the Empl ID field.</p> 

Step	Action
	Click the <b>Search</b> button.
3	<p>On the Work Location page, click the + icon to insert a new row.</p> 
4	<p>In the new row, select:</p> <ul style="list-style-type: none"> <li>▪ <b>Effective Date</b> = change, if necessary.</li> <li>▪ <b>Action</b> = Termination</li> </ul>  <p>Click the <b>Save</b> button.</p> <p> Upon Save, the non-officer's user ID will be deactivated.</p>