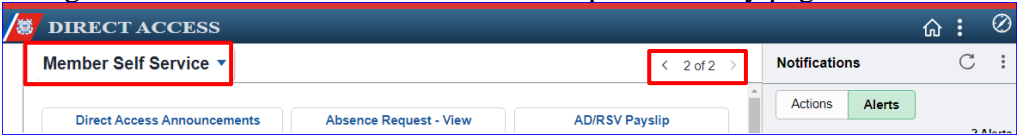



Recertifying DA User Roles and Functions

Introduction This guide provides the procedures for users to recertify their Direct Access (DA) user roles and functions in DA.

- IMPORTANT**
- If a User Role or Function is no longer required or additional roles are needed, STOP. Adding or removing user roles means this is NO LONGER A RECERTIFICATION; a new request must be submitted to add and/or remove user roles.
 - See the [DA Notifications Guide](#) for DA Alerts for Recertifications.
 - For more information on adding or removing user roles, see the [Direct Access User Roles and Functions](#) user guide.

Procedures See below.

Step	Action
1	<p>Navigate to Member Self Service via the drop-down or by page arrows.</p> 
2	<p>Click on the User Access Request tile.</p> 

Continued on next page

Recertifying DA User Roles and Functions, Continued

Procedures,
continued

Step	Action																												
<p>3</p>	<p>The User Access Request page will display. Click Initiate Request.</p> <div data-bbox="331 443 1369 757" style="border: 1px solid blue; padding: 5px;"> <p>User Access Request</p> <p>This page is used to request user access to the Direct Access system. This page can be used to add additional roles or delete existing roles. The request must be approved by appropriate authority.</p> <p>User ID: 1234567 DAVID POWERS</p> <div style="border: 2px solid red; display: inline-block; padding: 2px 10px; margin: 5px 0;">Initiate Request</div> <p>Many of these roles either require special routing or additional documents in order for the role to be granted. Review the Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), Chapter 2, for additional guidance.</p> </div>																												
<p>4</p>	<p>Any Current Roles and Current Functions for the member will display. Click View All (if necessary) to view the entire list of Current Roles and Current Functions.</p> <p>NOTE: When members PCS, their Roles are reset to Self-Service only. See the Direct Access User Roles and Functions user guide for information on how to add Roles and Functions.</p> <div data-bbox="331 1055 1369 1608" style="border: 1px solid blue; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1234567 Hoban Washburne</p> <p>Request ID: Request Status:</p> <div style="border: 2px solid red; display: inline-block; padding: 2px 5px; margin-bottom: 5px;">Current Roles</div> <p style="text-align: right;">Personalize Find View All [Print] [Refresh] First 1-3 of 8 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>CGADMINSUP</td> <td>CG Admin Supervisor</td> <td>Role Details</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>CGDSCPWW</td> <td>Disciplinary Actions View Only</td> <td>Role Details</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>CGFIELDADM</td> <td>Unit ADMIN access to limited HR</td> <td>Role Details</td> </tr> </tbody> </table> <div style="border: 2px solid red; display: inline-block; padding: 2px 5px; margin-bottom: 5px;">Current Functions</div> <p style="text-align: right;">Personalize Find View All [Print] [Refresh] First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)</td> <td>CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)</td> </tr> </tbody> </table> <div style="border: 2px solid red; display: inline-block; padding: 2px 5px; margin-bottom: 5px;">Add Functions</div> <p style="text-align: right;">Personalize Find View All [Print] [Refresh] First 1-3 of 48 Last</p> <p>Add Function: Function Name</p> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGADMINSUP	CG Admin Supervisor	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGDSCPWW	Disciplinary Actions View Only	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGFIELDADM	Unit ADMIN access to limited HR	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)	CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)
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Recertifying DA User Roles and Functions, Continued

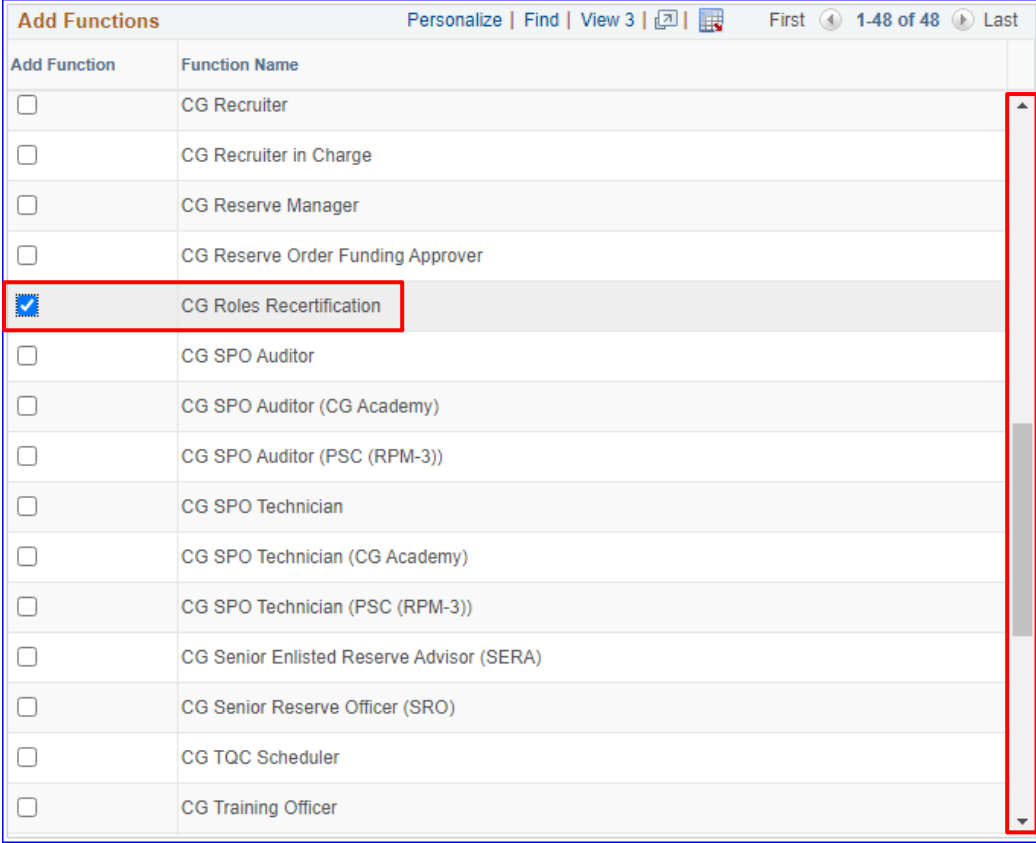
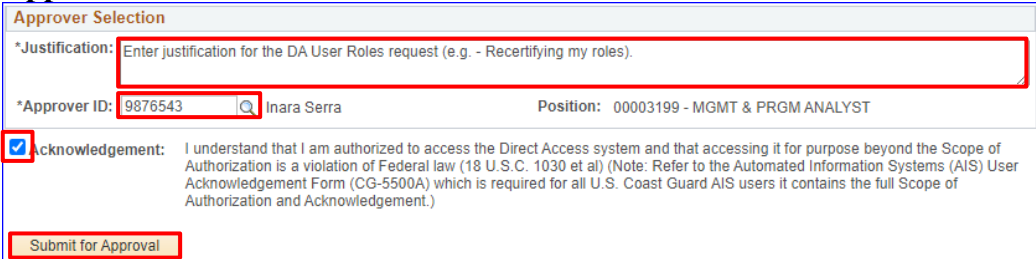
Procedures,
continued

Step	Action																																																					
5	<p>Review each Role and Function to ensure they are still valid. If a Role or Function is no longer required or additional roles are needed, STOP. Adding or removing user roles means this is NO LONGER A RECERTIFICATION; a new request must be submitted to add and/or remove user roles. See the Direct Access User Roles and Functions user guide for procedures to add or remove User Roles and Functions.</p> <p>NOTE: Do NOT remove the CGROWSEC_CGAD role.</p> <div data-bbox="327 730 1369 1547" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1234567 Hoban Washburne</p> <p>Request ID: Request Status:</p> <hr/> <p>Current Roles Personalize Find View 3 [Print] [Refresh] First 1-8 of 8 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGADMINSUP</td><td>CG Admin Supervisor</td><td>Role Details</td></tr> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGDSCPWW</td><td>Disciplinary Actions View Only</td><td>Role Details</td></tr> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGFIELDADM</td><td>Unit ADMIN access to limited HR</td><td>Role Details</td></tr> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGHRS</td><td>Coast Guard HRS/PERSRU</td><td>Role Details</td></tr> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGHRSWW</td><td>HRS/PERSRU Display Only</td><td>Role Details</td></tr> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGROWSEC_CGAD</td><td>CG Active Duty Row Security</td><td>Role Details</td></tr> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGSSCMD</td><td>CG Self Service Command</td><td>Role Details</td></tr> <tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>CGSSMBR</td><td>CG Self Service Member</td><td>Role Details</td></tr> </tbody> </table> <hr/> <p>Current Functions Personalize Find View All [Print] [Refresh] First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)</td> <td>CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)</td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGADMINSUP	CG Admin Supervisor	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGDSCPWW	Disciplinary Actions View Only	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGFIELDADM	Unit ADMIN access to limited HR	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRS	Coast Guard HRS/PERSRU	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRSWW	HRS/PERSRU Display Only	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGROWSEC_CGAD	CG Active Duty Row Security	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSCMD	CG Self Service Command	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSMBR	CG Self Service Member	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)	CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)
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6	<p>If everything is accurate, click View All in the Add Functions section.</p> <div data-bbox="327 1621 1369 1865" style="border: 1px solid black; padding: 5px;"> <p>Add Functions Personalize Find View All [Print] [Refresh] First 1-3 of 48 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Add Function</th> <th>Function Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>CG Admin (PSI Enhanced) (YN3-YN2 Only)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Admin (YN-PERS Only)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Assignment Officer (EPM)</td> </tr> </tbody> </table> </div>	Add Function	Function Name	<input type="checkbox"/>	CG Admin (PSI Enhanced) (YN3-YN2 Only)	<input type="checkbox"/>	CG Admin (YN-PERS Only)	<input type="checkbox"/>	CG Assignment Officer (EPM)																																													
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Recertifying DA User Roles and Functions, Continued




Procedures,
continued

Step	Action
7	<p>Scroll through the list of Functions and select CG Roles Recertification.</p>  <p>The screenshot shows a web interface titled "Add Functions". At the top, there are navigation options: "Personalize", "Find", "View 3", and "First 1-48 of 48 Last". Below this is a table with two columns: "Add Function" (checkboxes) and "Function Name". The "CG Roles Recertification" row is highlighted in grey and has a red box around it. Other roles listed include CG Recruiter, CG Recruiter in Charge, CG Reserve Manager, CG Reserve Order Funding Approver, CG SPO Auditor, CG SPO Auditor (CG Academy), CG SPO Auditor (PSC (RPM-3)), CG SPO Technician, CG SPO Technician (CG Academy), CG SPO Technician (PSC (RPM-3)), CG Senior Enlisted Reserve Advisor (SERA), CG Senior Reserve Officer (SRO), CG TQC Scheduler, and CG Training Officer. A vertical scrollbar is visible on the right side of the table.</p>
8	<p>Scroll to the bottom of the page and enter the Justification for the User Access Request (required). Enter the Approver ID (approver's Employee ID number) or use the Lookup to locate the approver's Employee ID number.</p> <p>Review the statement and check the Acknowledgement box. Click Submit for Approval.</p>  <p>The screenshot shows the "Approver Selection" section of the form. It contains a text box for "Justification" with the placeholder text "Enter justification for the DA User Roles request (e.g. - Recertifying my roles)". Below this is the "Approver ID" field, which contains the value "9876543" and a search icon. To the right of the ID field, the name "Inara Serra" and position "00003199 - MGMT & PRGM ANALYST" are displayed. There is a checked checkbox for "Acknowledgement" with the text: "I understand that I am authorized to access the Direct Access system and that accessing it for purpose beyond the Scope of Authorization is a violation of Federal law (18 U.S.C. 1030 et al) (Note: Refer to the Automated Information Systems (AIS) User Acknowledgement Form (CG-5500A) which is required for all U.S. Coast Guard AIS users it contains the full Scope of Authorization and Acknowledgement.)". At the bottom of the form is a button labeled "Submit for Approval".</p>

Continued on next page

Recertifying DA User Roles and Functions, Continued

Procedures,
continued

Step	Action
9	<p>Once submitted, the request will be placed in a Pending status and email notification will be sent to the Approver. It is important to follow up with the Approver. If the User Access Request is not approved within 30 days, DA will automatically terminate the request and email the submitter to submit a new request.</p> <p>NOTE: Once the Approver approves the request, it will be sent to PPC for final approval.</p> <div data-bbox="328 719 1369 1010" style="border: 1px solid blue; padding: 5px;"> <p>User Access Request</p> <p>Request Status: Pending</p> <p>1</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid gray; padding: 5px; width: 45%;"> <p>Pending</p> <p>Inara Serra Initial Approve Action Request</p>  </div> <div style="font-size: 24px;">→</div> <div style="border: 1px solid gray; padding: 5px; width: 45%;"> <p>Not Routed</p> <p>Multiple Approvers User Access Request Final Appr</p>  </div> </div> </div> <div data-bbox="328 1048 1230 1507" style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <div style="display: flex; align-items: center;">  <div> <p>Wed 8/3/2022 7:22 AM</p> <p>DoNotReply@direct-access.uscg.mil</p> <p>User Access Request - Waiting Approval</p> </div> </div> <p>To: Serra, Inara CIV SERENITY (USA)</p> <hr/> <p>User access request has been waiting for your approval.</p> <p>Requested For : Hoban Washburne Request ID : 0066259</p> </div>