

## Hire – ROCI Overview

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### Introduction

This guide provides the procedures for accessing a member into the Reserve Officer Candidate Indoctrination (ROCI) program in Direct Access (DA).

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### Important Information

- **IMPORTANT: DO NOT** click **OK** or **Apply** unless prompted. It will not allow the pay record of the applicant to update correctly.
  - You **cannot** future date a Hire Transaction Start Date. It will not allow you to save it.
  - Ensure the members paygrade is listed on the DD-4. If missing or there is a discrepancy from what is listed in DA, **please return to originator (Recruiter, RPM, EPM or OPM)** to get corrected before processing the accession.
  - Date of Hire = Date of the Oath of Office
  - It is good practice to IMMEDIATELY enter the contract into DA once the hire portion is complete and Job Data has been verified. The contract should not be approved without first viewing a signed copy of the Oath of Office and Active Duty agreement if applicable.
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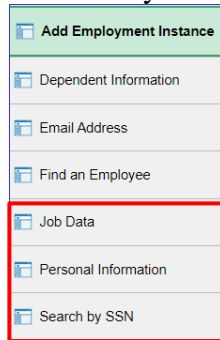
## Before You Begin ANY Hire or Rehire, Continued

### Before You Begin ANY Hire or Rehire

Before starting a hire/rehire, you must first determine whether the member is already in the system. Failure to do so may cause one member to have two Empl Records or even two separate Employee IDs.

There are three places to verify this in the HR Data Shortcuts tile:

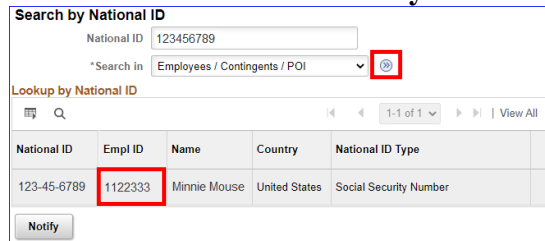
- **Search by SSN** (Social Security Number).
- **Search by full name** in either **Job Data** or **Personal Information**.



When searching by SSN, you may find the member already has an Empl ID in the system.

You **MUST** click the **GO** button to search.

**NOTE: If the member already has an Empl ID, you must do a Rehire.**



**Bad Example:** See [Employee Records](#).

Empl ID	Empl Rec	Name	First Name	Last Name	Sec Name	Alte	Ch	Middle Name	Business Unit	Department Set ID	Department	Location Code	Regulatory Region
1234567	0	Test2 Duplicates	Test2	Duplicates	(bla	(blar	for		CADCG	00010	004311	CT0004	AD
1234567	1	Test2 Duplicates	Test2	Duplicates	(bla	(blar	for		CADCG	00010	004311	CT0004	AD

**Good Example:**

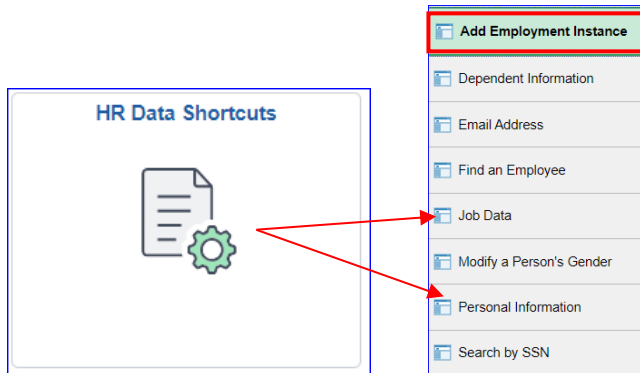
Empl ID	Empl Rec	Name	First Name	Last Name	Sec Name	Alte	Ch	Middle Name	Business Unit	Department Set ID	Department	Location Code	Regulatory Region
1234567	0	Test2 Duplicates	Test2	Duplicates	(bla	(blar	for		CIVCG	00010	007800	KS0001	NOMIL
1234567	1	Test2 Duplicates	Test2	Duplicates	(bla	(blar	for		ENLCG	00010	003333	KS0001	AD
1234567	2	Test2 Duplicates	Test2	Duplicates	(bla	(blar	for		RETCG	00010	CGRETDEF	CGRETLOC	RETCG

## Important Information Regarding Employee Records

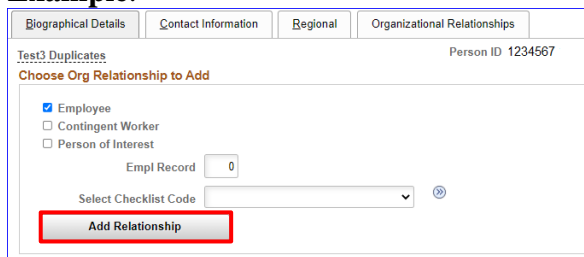
### Employee Records

**NOTE:** If for any reason this Accession is **not completed but an Empl ID was issued and Job data was never entered**, use the **Add Employment Instance** option. All previous unsaved Job Data entries will need to be re-entered.

**NOTE:** **Do not use the Add Employment Instance if you had previously entered and saved anything in Job Data with an EMPL ID given.** Any edits after the initial save **will create a second Empl ID for the member.** See [Before You Begin ANY Hire or Rehire Bad Example](#). Any edits should be made using the Personal Information or Job Data links.

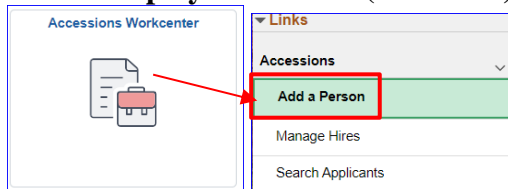


The **Add Relationship** button is the key button that can give one Employee ID **another Employee Record**. See [Before You Begin ANY Hire or Rehire Bad Example](#).

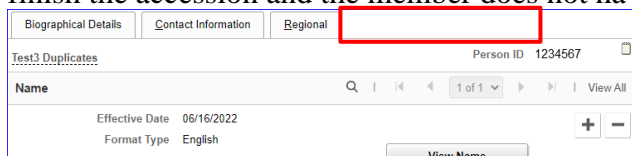


Only persons with the ability to Access someone into DA have the two links that display the **Add Relationship** button.

- **Add a Person**
- **Add Employee Instance (see above)**



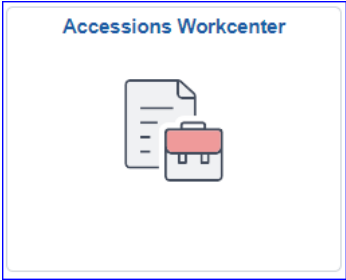
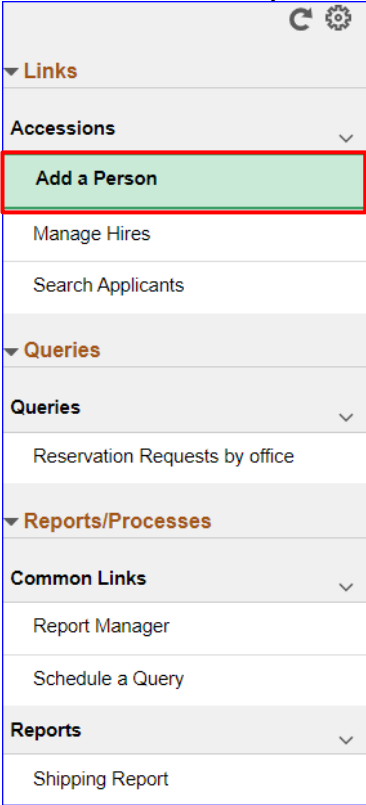
The only time you should use the Add Employee Instance link is if the **Organizational Relationships** tab is missing in Personal Information, you did not finish the accession and the member does not have Job Data.



# Accessing the Member

**Introduction** This section provides the procedures for accessing the member into DA.

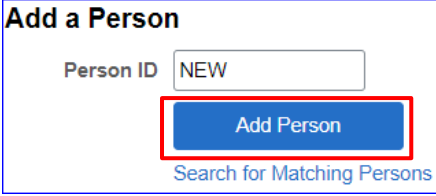
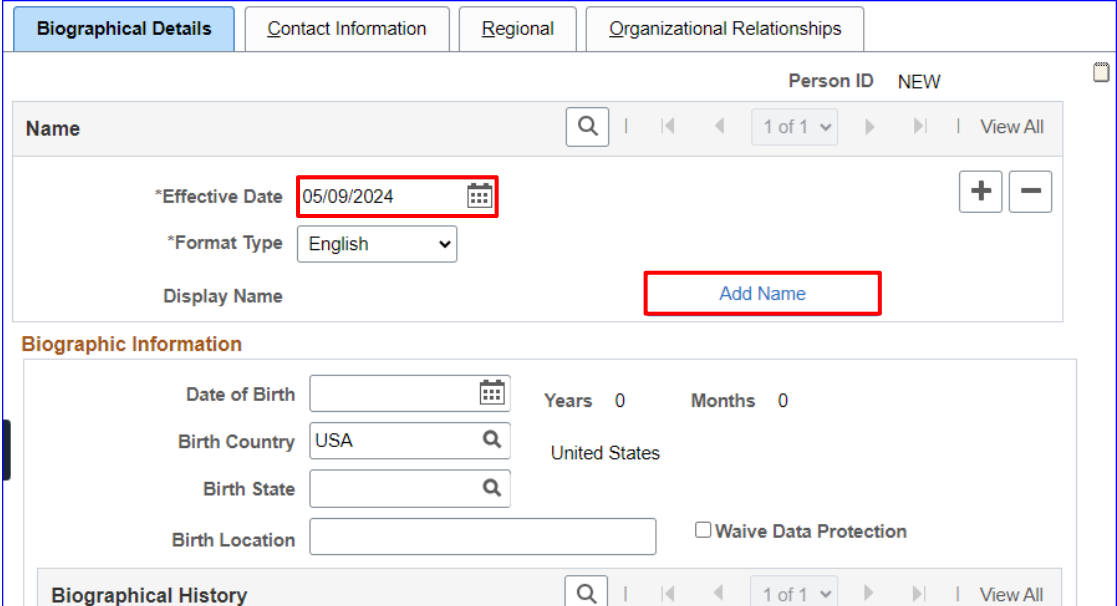
**Procedure** See below.

Step	Action
1	<p>Click on the <b>Accessions Workcenter</b> tile.</p> 
2	<p>The <b>Add a Person</b> option will automatically display.</p> 

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## Accessing the Member, Continued

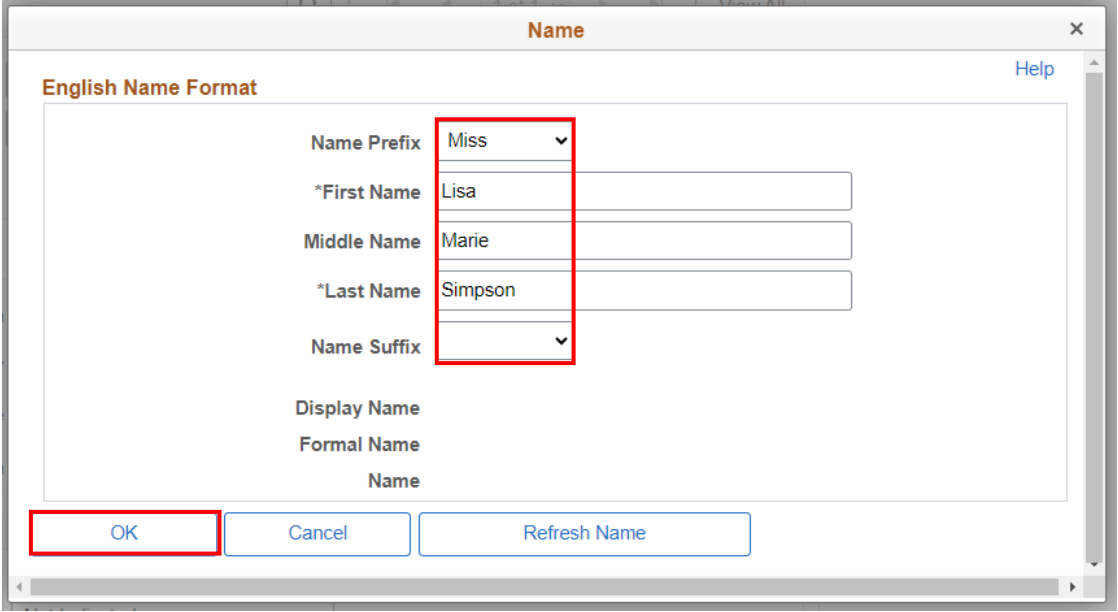
Procedure,  
continued

Step	Action
3	<p>The Person ID field auto-populates with NEW. Click <b>Add Person</b>.</p> 
4	<p>The <b>Effective Date</b> will default to the current date. Enter the appropriate date (cannot be future dated). Click <b>Add Name</b>.</p> 

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## Accessing the Member, Continued

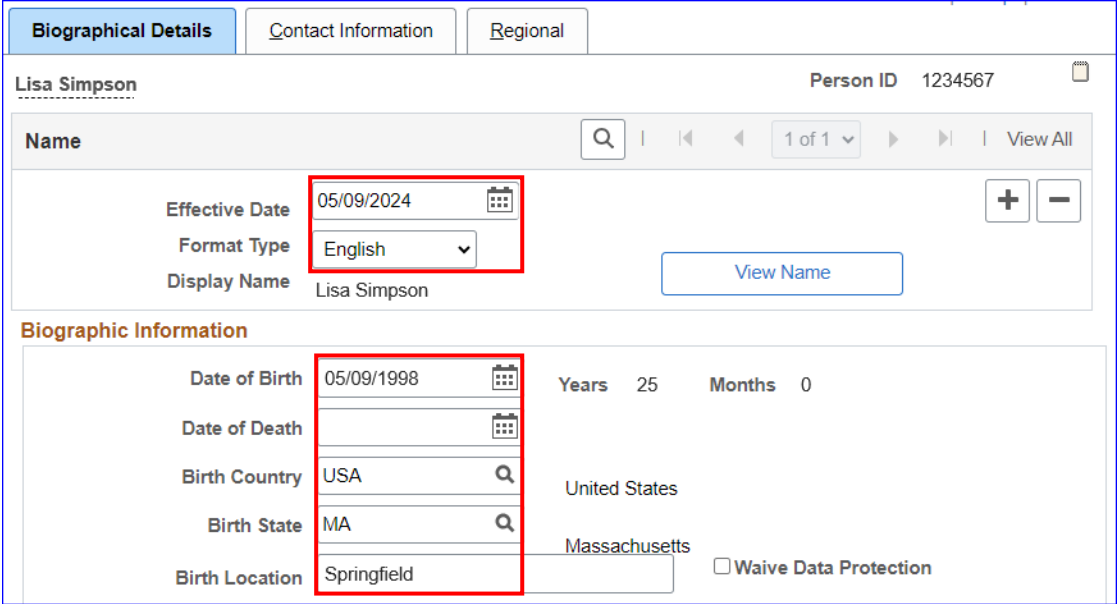
Procedure,  
continued

Step	Action
5	<p>Enter the member's complete <b>Name</b> including the full middle name (failure to enter the full middle name will result in issues by <b>NOT</b> populating on the DD-214). When complete, click <b>OK</b></p> <p><b>NOTE:</b> Do not use NMN for members with "No Middle Name". The government travel card will be issued with a middle name of "N" and cause denial of its use for the member. <b>LEAVE IT BLANK.</b></p> 

*Continued on next page*

## Accessing the Member, Continued

Procedure,  
continued

Step	Action
6	<p>Name section:</p> <ul style="list-style-type: none"> <li>• <b>Effective Date</b> – Defaults to current date. Enter the date of Accession (if necessary).</li> <li>• <b>Format Type</b> – Leave as English.</li> </ul> <p>Biographical information section:</p> <ul style="list-style-type: none"> <li>• <b>Date of Birth</b> – Enter the member’s birth date.</li> <li>• <b>Birth Country</b> – Defaults to USA, if different, use the lookup icon to select the correct birth country (other fields may appear/change).</li> <li>• <b>Birth State</b> – Enter the state where the member was born.</li> <li>• <b>Birth Location</b> – Enter the city/town where the member was born.</li> </ul> 

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## Accessing the Member, Continued

Procedure,  
continued

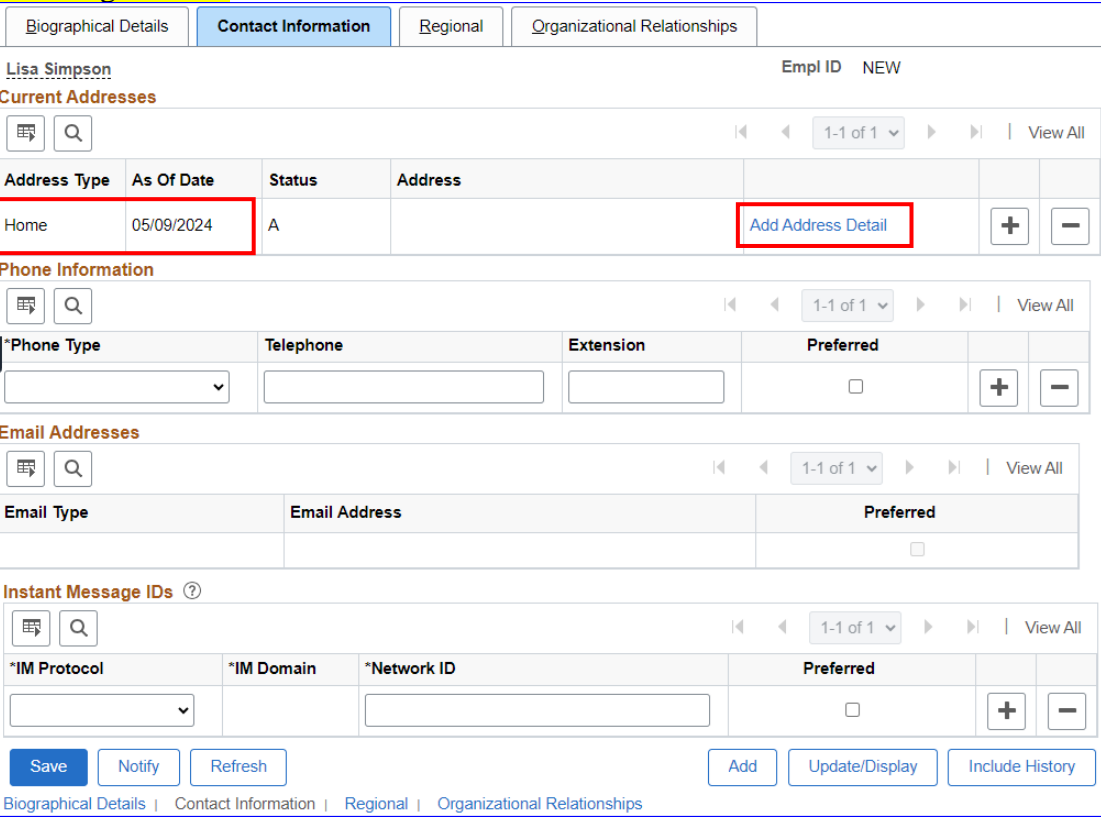
Step	Action																																				
7	<p>Biographical History section:</p> <ul style="list-style-type: none"> <li>• <b>Effective Date</b> – Must match the Effective Date above.</li> <li>• <b>Gender</b> – Not editable.</li> <li>• <b>Highest Education Level</b> – Select the education level from the drop-down.</li> <li>• <b>Marital Status and As of</b> – Select the status from the drop-down and enter the date of marriage (if applicable).</li> <li>• <b>Language Code</b> – Select English from the drop-down.</li> <li>• <b>Alternate ID &amp; Full-Time Student</b> – DO NOT USE.</li> <li>• <b>National ID</b> – Enter the member’s Social Security Number (with hyphens).</li> <li>• <b>Primary ID</b> – Is automatically checked.</li> </ul> <p><b>Biographical History</b></p> <table border="1"> <tr> <td>*Effective Date</td> <td>05/09/2024</td> <td></td> <td></td> </tr> <tr> <td>Gender</td> <td>Unknown</td> <td></td> <td></td> </tr> <tr> <td>*Highest Education Level</td> <td>Not Indicated</td> <td></td> <td></td> </tr> <tr> <td>*Marital Status</td> <td>Married</td> <td>As of</td> <td>05/01/2024</td> </tr> <tr> <td>Language Code</td> <td>English</td> <td></td> <td></td> </tr> <tr> <td>Alternate ID</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Full-Time Student</td> <td></td> <td></td> <td></td> </tr> </table> <p><b>National ID</b></p> <table border="1"> <thead> <tr> <th>*Country</th> <th>*National ID Type</th> <th>National ID</th> <th>Primary ID</th> </tr> </thead> <tbody> <tr> <td>USA</td> <td>Social Security Number</td> <td>123-45-6789</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p>Buttons: Save, Return to Search, Notify, Refresh, Add, Update/Display, Include History, Correct History</p> <p>Navigation: Biographical Details   Contact Information   Regional</p>	*Effective Date	05/09/2024			Gender	Unknown			*Highest Education Level	Not Indicated			*Marital Status	Married	As of	05/01/2024	Language Code	English			Alternate ID				<input type="checkbox"/> Full-Time Student				*Country	*National ID Type	National ID	Primary ID	USA	Social Security Number	123-45-6789	<input checked="" type="checkbox"/>
*Effective Date	05/09/2024																																				
Gender	Unknown																																				
*Highest Education Level	Not Indicated																																				
*Marital Status	Married	As of	05/01/2024																																		
Language Code	English																																				
Alternate ID																																					
<input type="checkbox"/> Full-Time Student																																					
*Country	*National ID Type	National ID	Primary ID																																		
USA	Social Security Number	123-45-6789	<input checked="" type="checkbox"/>																																		
8	<p>Select the <b>Contact Information</b> tab.</p> <p>Biographical Details   <b>Contact Information</b>   Regional   Organizational Relationships</p>																																				

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# Accessing the Member, Continued

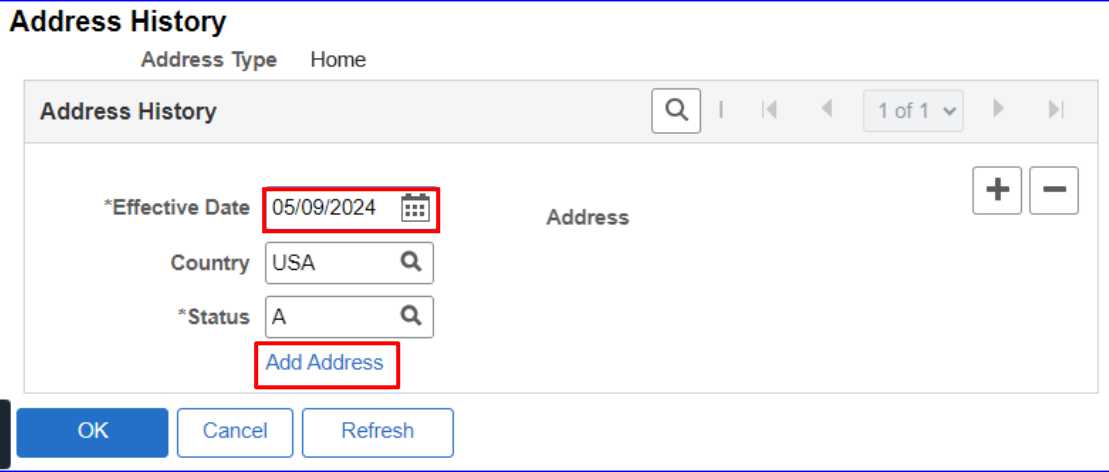
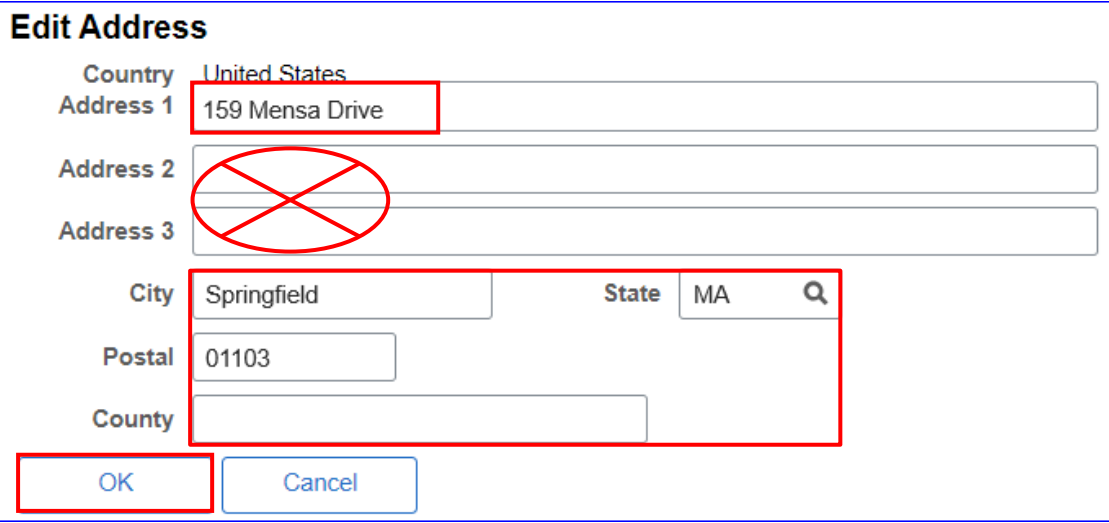
Procedure,  
continued

Step	Action										
9	<p>DA defaults the first <b>Address Type</b> to Home and the <b>As Of Date</b> is the date of hire. Click the <b>Add Address Detail</b> link.</p> <p><b>NOTE: Required Address Types must include:</b></p> <ul style="list-style-type: none"> <li>• Thrift Savings Plan (TSP) address</li> <li>• Home of record address</li> <li>• Mailing Address</li> </ul>  <p>The screenshot shows the 'Contact Information' tab for Lisa Simpson. The 'Current Addresses' section contains a table with the following data:</p> <table border="1"> <thead> <tr> <th>Address Type</th> <th>As Of Date</th> <th>Status</th> <th>Address</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Home</td> <td>05/09/2024</td> <td>A</td> <td></td> <td>Add Address Detail</td> </tr> </tbody> </table> <p>Other sections visible include 'Phone Information', 'Email Addresses', and 'Instant Message IDs'. At the bottom, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Include History'.</p>	Address Type	As Of Date	Status	Address	Action	Home	05/09/2024	A		Add Address Detail
Address Type	As Of Date	Status	Address	Action							
Home	05/09/2024	A		Add Address Detail							

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## Accessing the Member, Continued

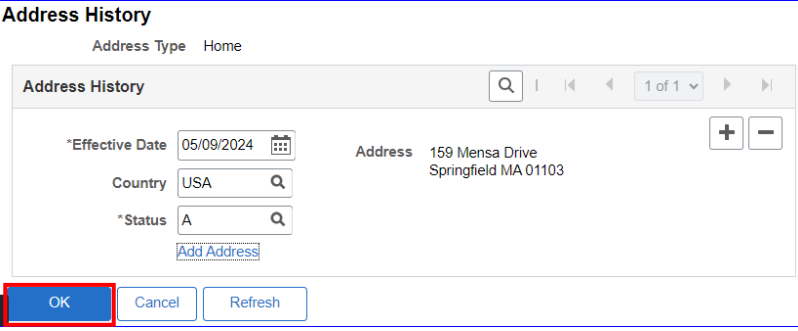
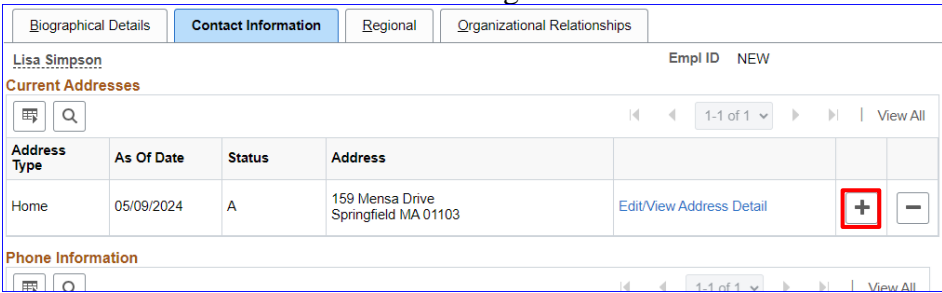
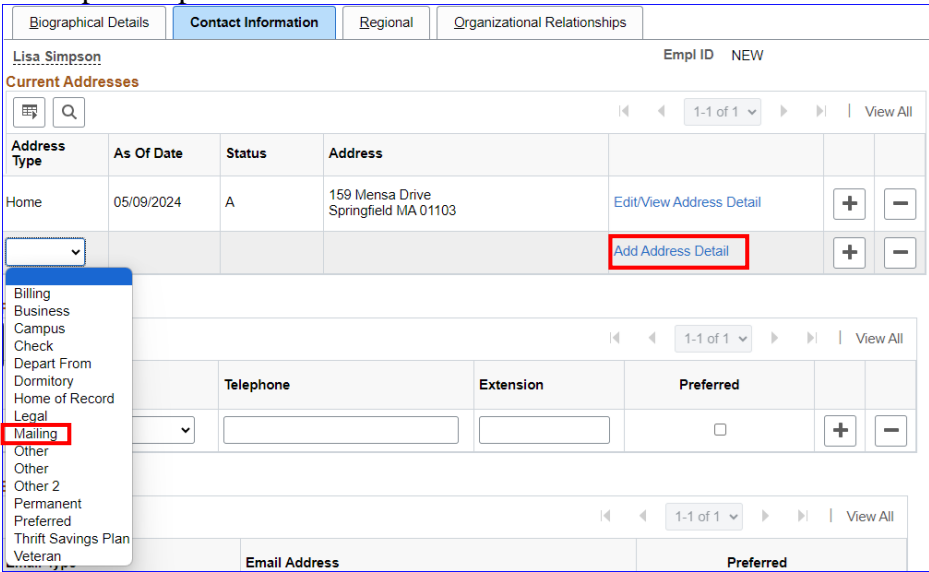
Procedure,  
continued

Step	Action
10	<p>Enter the <b>Effective Date</b> (cannot be future dated). Click <b>Add Address</b>.</p> 
11	<ul style="list-style-type: none"> <li>• <b>Address 1</b> – Enter the number and the street name.</li> <li>• <b>Address 2</b> – Not Used.</li> <li>• <b>Address 3</b> – Not Used.</li> <li>• <b>City</b> – Enter the city.</li> <li>• <b>State</b> – Enter the state.</li> <li>• <b>Postal</b> – Enter the postal zip code.</li> <li>• <b>County</b> – Enter the county (if known).</li> </ul> <p>Click <b>OK</b>.</p> 

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## Accessing the Member, Continued

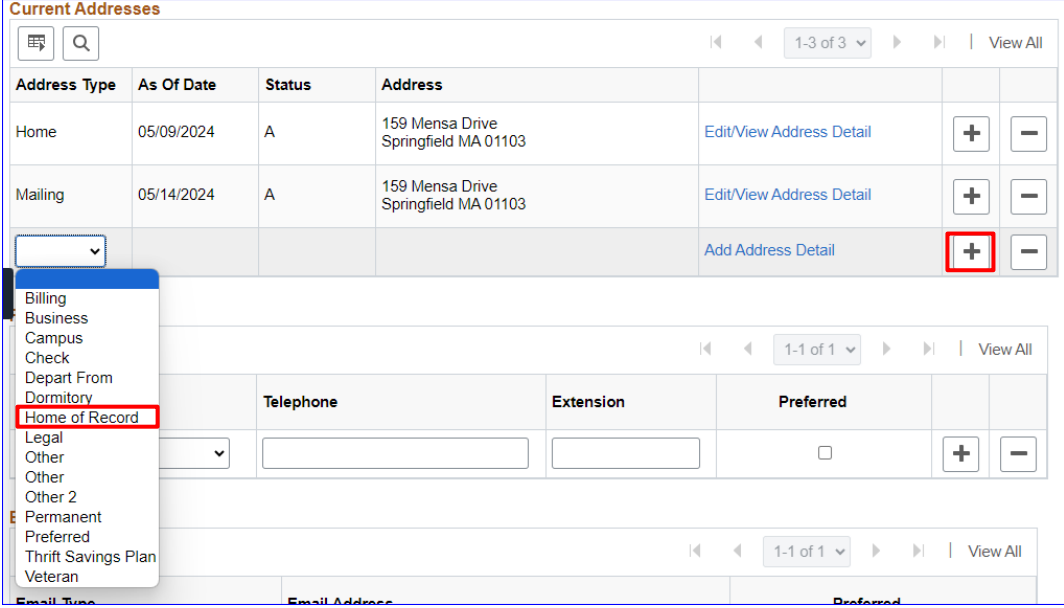
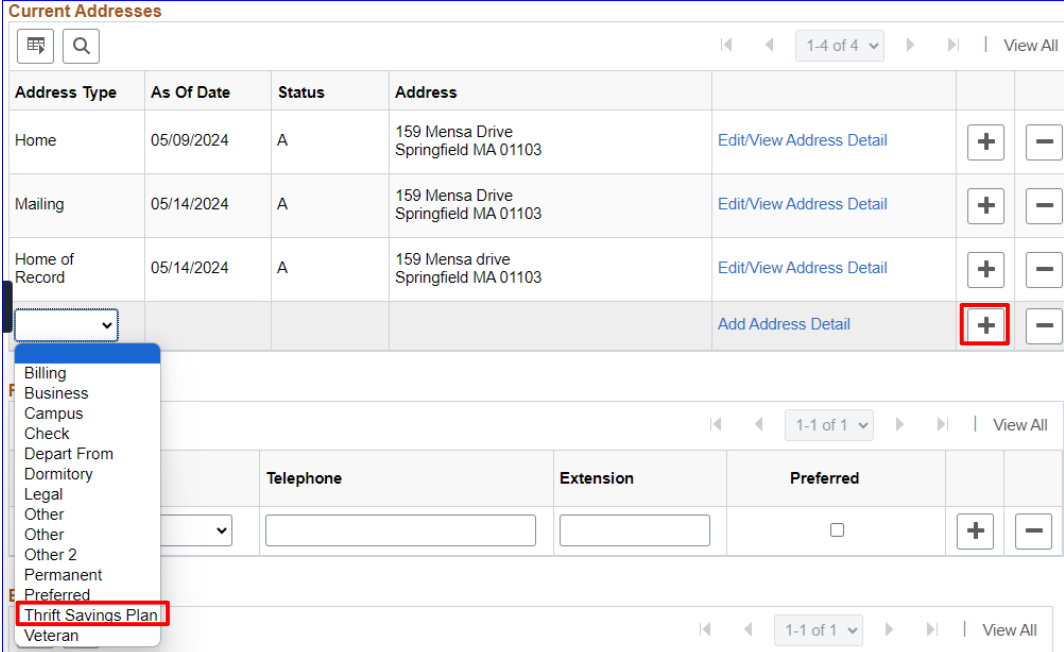
Procedure,  
continued

Step	Action
12	<p>Click <b>OK</b>.</p>  <p>The screenshot shows a dialog box titled "Address History" with a sub-tab "Home". It contains fields for "Effective Date" (05/09/2024), "Country" (USA), and "Status" (A). The address is "159 Mensa Drive, Springfield MA 01103". At the bottom, the "OK" button is highlighted with a red box, along with "Cancel" and "Refresh" buttons.</p>
13	<p>Click the <b>Plus</b> button to add the Mailing Address.</p>  <p>The screenshot shows the "Contact Information" tab of a member profile for Lisa Simpson. Under "Current Addresses", there is a table with one row: Home, 05/09/2024, A, 159 Mensa Drive, Springfield MA 01103. The plus button in the table row is highlighted with a red box.</p>
14	<p>Select Mailing from the <b>Address Type</b> drop-down, click the <b>Add Address Detail</b> link and repeat steps 10 - 13.</p>  <p>The screenshot shows the same member profile page. The "Address Type" dropdown menu is open, and "Mailing" is selected and highlighted with a red box. The "Add Address Detail" link in the table row is also highlighted with a red box.</p>

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# Accessing the Member, Continued

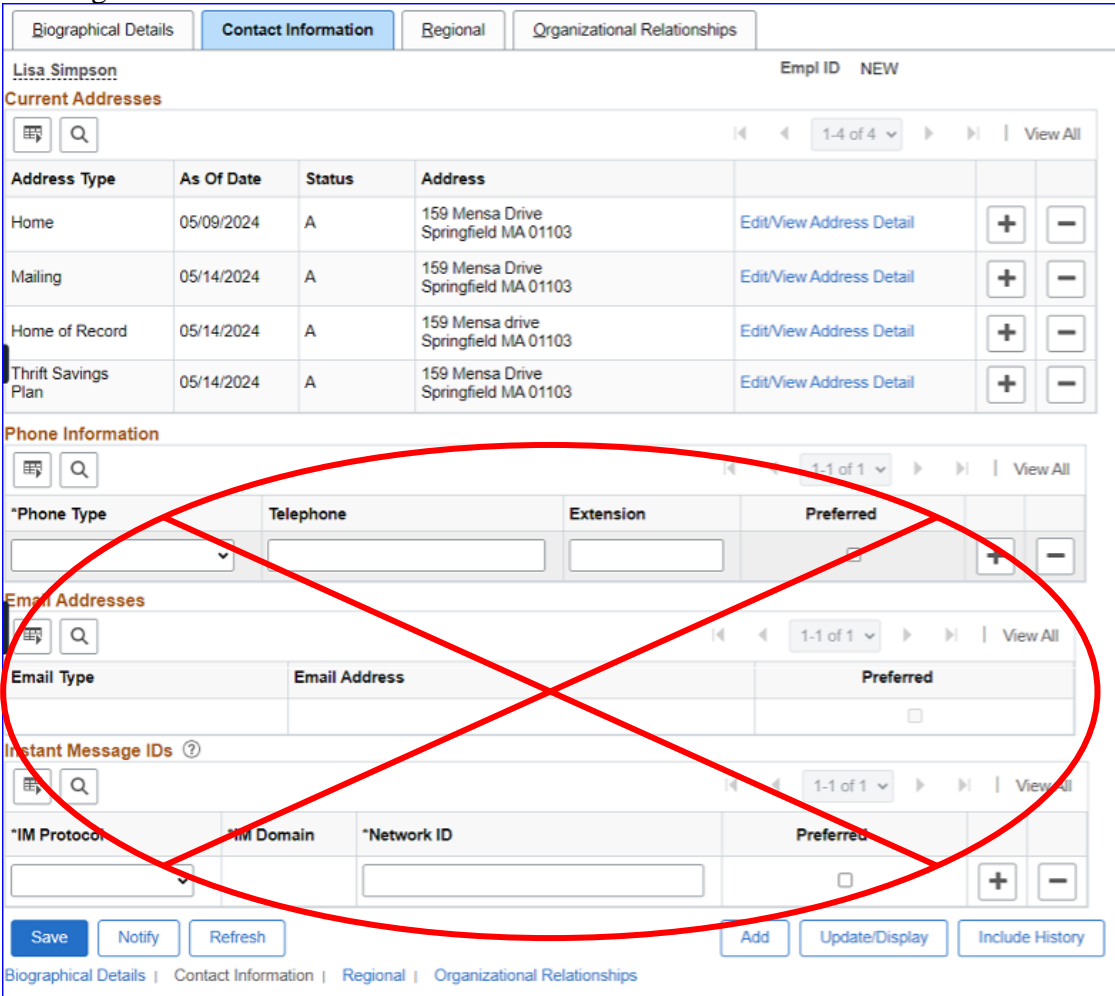

Procedure,  
continued

Step	Action
<p><b>15</b></p>	<p>Click the <b>Plus</b> button and repeat steps 10 - 13 to enter the <b>Home of Record</b> as identified on the DD4.</p> 
<p><b>16</b></p>	<p>Click the <b>Plus</b> button and repeat steps 10 – 13 to enter the <b>Thrift Savings Plan</b> from the Address Type drop-down.</p> 

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## Accessing the Member, Continued

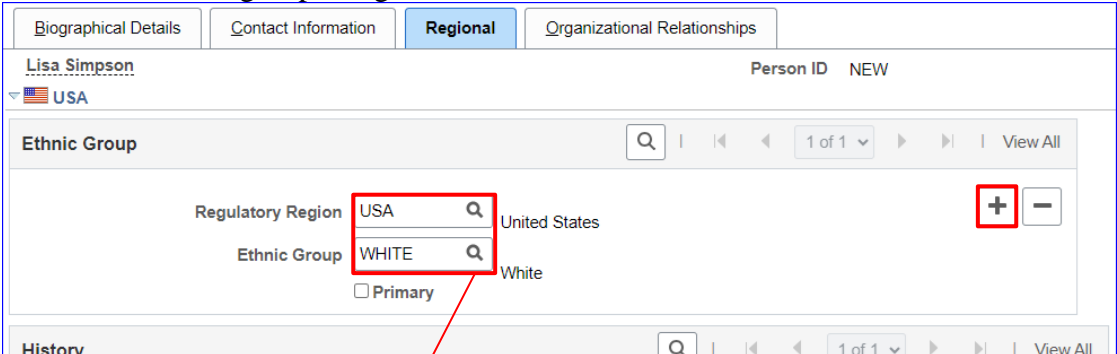
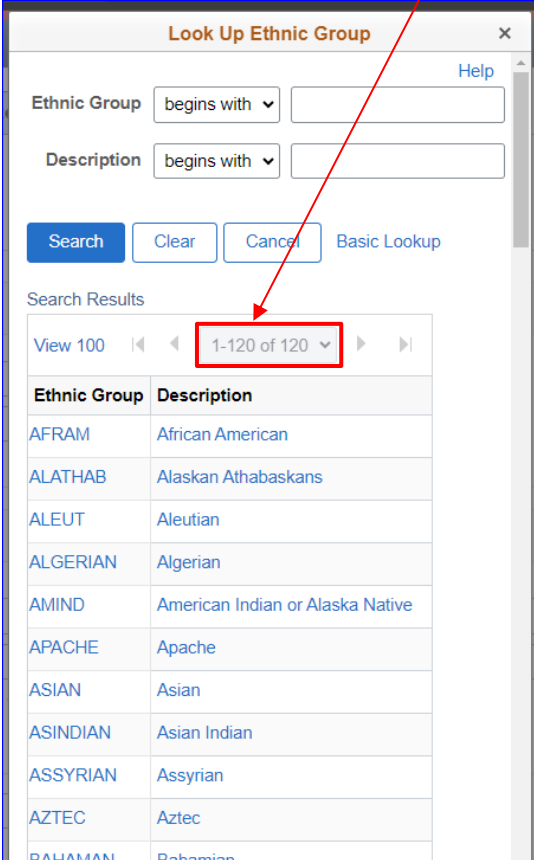
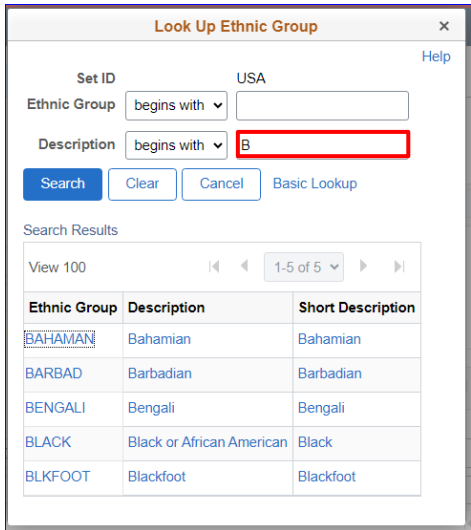
Procedure,  
continued

Step	Action
17	<p>The <b>Phone Information</b>, <b>Email Addresses</b> and <b>Instant Message IDs</b> should be left blank (to be entered/verified by the member before academy graduation).</p> <p><b>NOTE:</b> A <b>Business</b> email address is required to be able to use the forgotten password function in DA. See <a href="#">Personal Data Updates Member Email Address section</a> for entering the USCG.mil address in DA.</p> 
18	<p>Select the <b>Regional</b> tab.</p> 

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## Accessing the Member, Continued


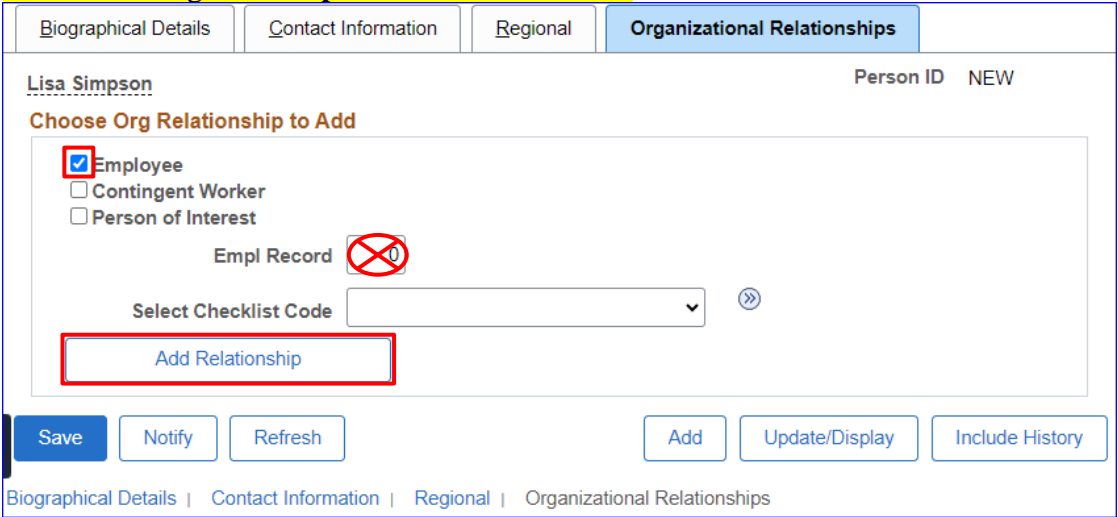
Procedure,  
continued

Step	Action
19	<ul style="list-style-type: none"> <li>• <b>Regulatory Region</b> – Ensure USA is displayed.</li> <li>• <b>Ethnic Group</b> – Click the lookup icon to select the appropriate category. Narrow the search by using the <b>Description</b> field. See below.</li> </ul> <p><b>NOTE:</b> If the member claims more than one ethnic group, click the <b>Plus</b> button, and add the additional group designation.</p>   

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## Accessing the Member, Continued

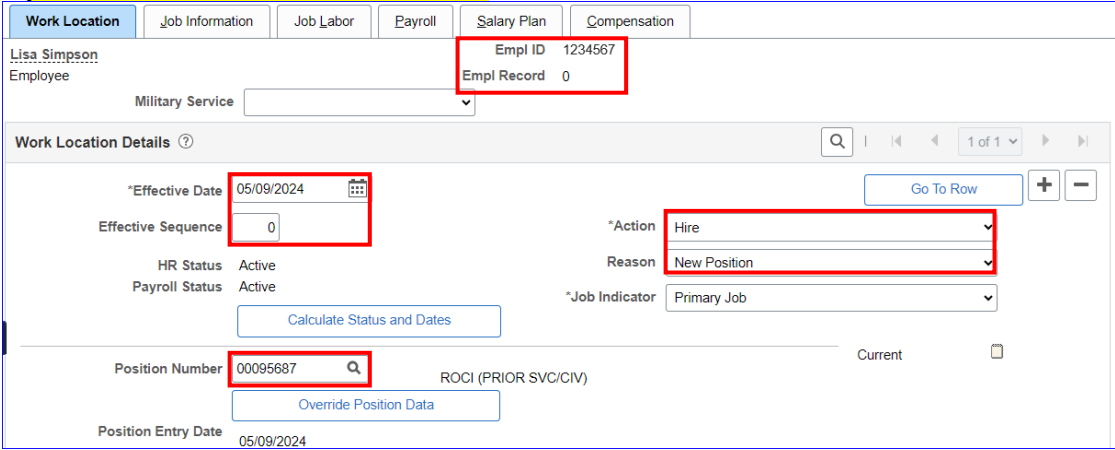
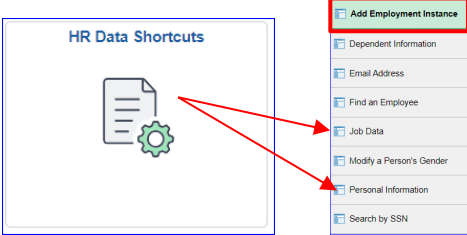
Procedure,  
continued

Step	Action
20	<p>Select the <b>Organizational Relationships</b> tab.</p> 
21	<p>Check the <b>Employee</b> box and click <b>Add Relationship</b>.</p> <p><b>Do NOT change the Empl Record number ever.</b></p> 

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## Accessing the Member, Continued

Procedure,  
continued

Step	Action
22	<p>The Job Data screen displays. The <b>Empl ID</b> and <b>Empl Record</b> will be generated on the Work Location tab (<b>Record this number for future reference.</b>) See NOTES.</p> <ul style="list-style-type: none"> <li>• <b>Effective Date</b> – Defaults to the current date. This date may be future dated to reflect the actual hire date.</li> <li>• <b>Effective Sequence</b> – Do not change.</li> <li>• <b>Action</b> – Defaults to Hire or select from the drop-down.</li> <li>• <b>Reason</b> – Select New Position from the drop-down.</li> <li>• <b>Position Number</b> – Enter 00095687. Click on the lookup icon to search for other position numbers. Hit <b>tab</b> to auto-populate known information. (Ex. A member being hired under ROCI but has prior service as an officer with no break in service, <b>use the position identified on the PCS orders.</b>)</li> </ul>  <p><b>NOTE:</b> If for any reason this Accession is <b>not completed but an Empl ID was issued and Job data was never entered</b>, use the <b>Add Employment Instance</b> option. Enter the Empl ID that was issued, select the Organizational Relationship tab, click Add Relationship &amp; you will be returned to Job Data with the issued Empl ID. All previous unsaved Job Data entries will need to be re-entered.</p> <p><b>NOTE:</b> <b>Do not use the Add Employment Instance if you had previously entered and saved anything in Job Data with an EMPL ID given.</b> Any edits after the initial save <b>will create a second Empl ID for the member.</b> Any edits should be made using the Personal Information or Job Data links. See <a href="#">Employee Records</a>.</p> 

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## Accessing the Member, Continued

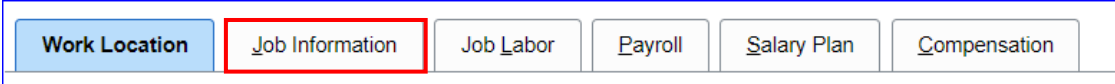
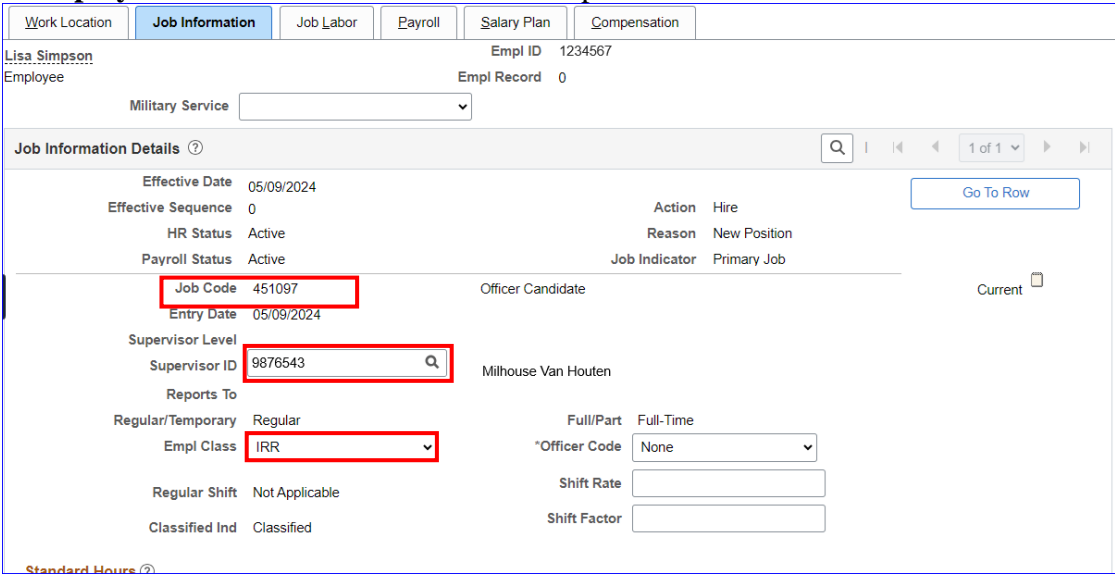

Procedure,  
continued

Step	Action
23	<p>If the auto-populated data needs changed/updated, click the <b>Override Position Data</b> button, and update as necessary. Otherwise enter or select USCG from the <b>Establishment ID</b> lookup icon.</p> <div data-bbox="300 595 1423 992" style="border: 1px solid black; padding: 5px;"> <p>Position Number: 00095687 <input type="text"/> <input type="button" value="Q"/> ROCI (PRIOR SVC/CIV) <span style="float: right;">Current</span></p> <p style="text-align: center;"><a href="#">Override Position Data</a></p> <p>Position Entry Date: 05/09/2024 <input type="text"/> <input type="button" value="Q"/></p> <p><input type="checkbox"/> Position Management Record</p> <p>Regulatory Region: RSV Reservists</p> <p>Company: ACG UNITED STATES COAST GUARD</p> <p>Business Unit: ENLCG Enlisted CG</p> <p>Department: 004750 OFFICER CANDIDATE SCHOOL</p> <p>Department Entry Date: 05/09/2024</p> <p>Location: CT0038 OFFICER CAND SCHOOL</p> <p>Establishment ID: USCG <input type="text"/> <input type="button" value="Q"/> Active CG <span style="float: right;">Date Created 05/14/2024</span></p> </div>
24	<p><b>Reserve Class Code</b> – Select N- w/Svc Oblig in another class.  <b>Members are hired as Seaman Apprentice Officer Candidates (SAOC) and have not yet received Oaths or are classified as Reserve Officers.</b></p> <div data-bbox="300 1126 1423 1406" style="border: 1px solid black; padding: 5px;"> <p>Last Start Date: 05/14/2024 <input type="text"/> <input type="button" value="Q"/></p> <p>Expected Job End Date: <input type="text"/> <input type="button" value="Q"/></p> <p>▼ Military</p> <p>Reserve Class Code: N <input type="text"/> <input type="button" value="Q"/> w/Svc Oblig not in another Cla</p> <p>Component Category: <input type="text"/> <input type="button" value="Q"/></p> <p>Job Data   Employment Data   Benefits Program Participation</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> <input type="button" value="Refresh"/></p> <p><a href="#">Work Location</a>   <a href="#">Job Information</a>   <a href="#">Job Labor</a>   <a href="#">Payroll</a>   <a href="#">Salary Plan</a>   <a href="#">Compensation</a></p> </div>

*Continued on next page*

## Accessing the Member, Continued

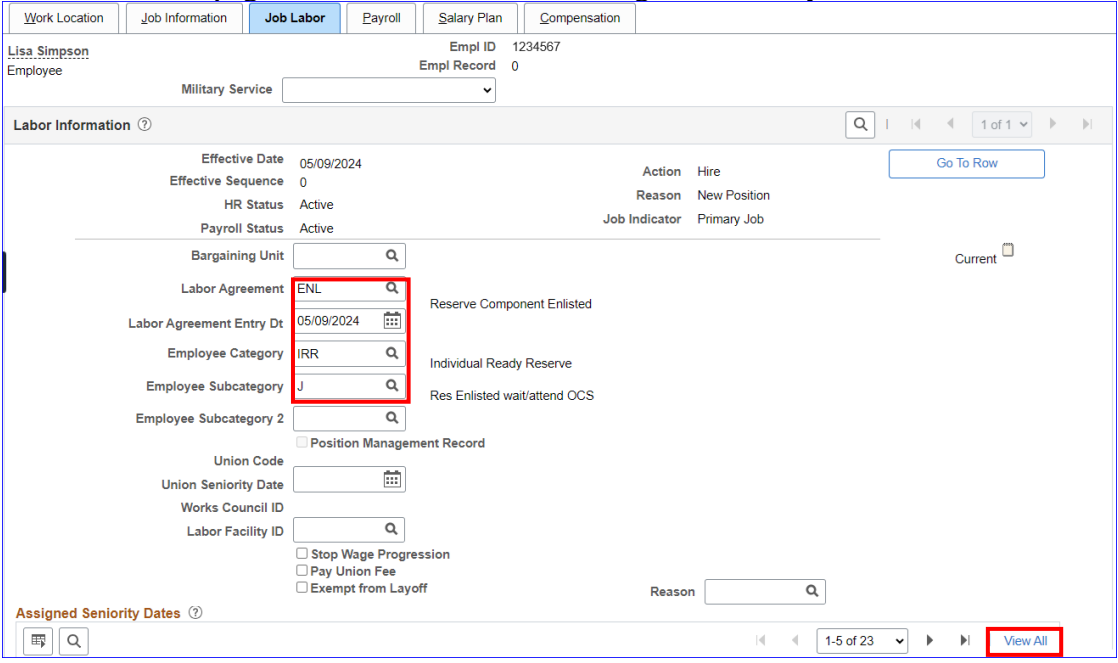
Procedure,  
continued

Step	Action
25	<p>Select the <b>Job Information</b> tab.</p> 
26	<p>Only enter in the two fields indicated below, <b>DO NOT</b> enter any other data fields.</p> <ul style="list-style-type: none"> <li>• <b>Job Code</b> – Verify 451097 is displayed.</li> <li>• <b>Supervisor ID</b> – Enter the CGHR SUP Empl ID that approves Accessions.</li> <li>• <b>Employee Class</b> – Select IRR from the drop-down.</li> </ul> 
27	<p>Select the <b>Job Labor</b> tab.</p> 

*Continued on next page*

## Accessing the Member, Continued

Procedure,  
continued

Step	Action
28	<p>Only enter these fields, <b>DO NOT</b> enter any other data fields.</p> <ul style="list-style-type: none"> <li>• <b>Labor Agreement</b> – Select ENL from the lookup icon.</li> <li>• <b>Labor Agreement Entry Dt</b> – Will default to the date of hire.</li> <li>• <b>Employee Category</b> – Select IRR from the lookup icon.</li> <li>• <b>Employee Subcategory</b> – Enter TRAYPAY Code J.</li> </ul> <p>Scroll down the page and click <b>View All</b> for Assigned Seniority Dates.</p> 

*Continued on next page*

## Accessing the Member, Continued

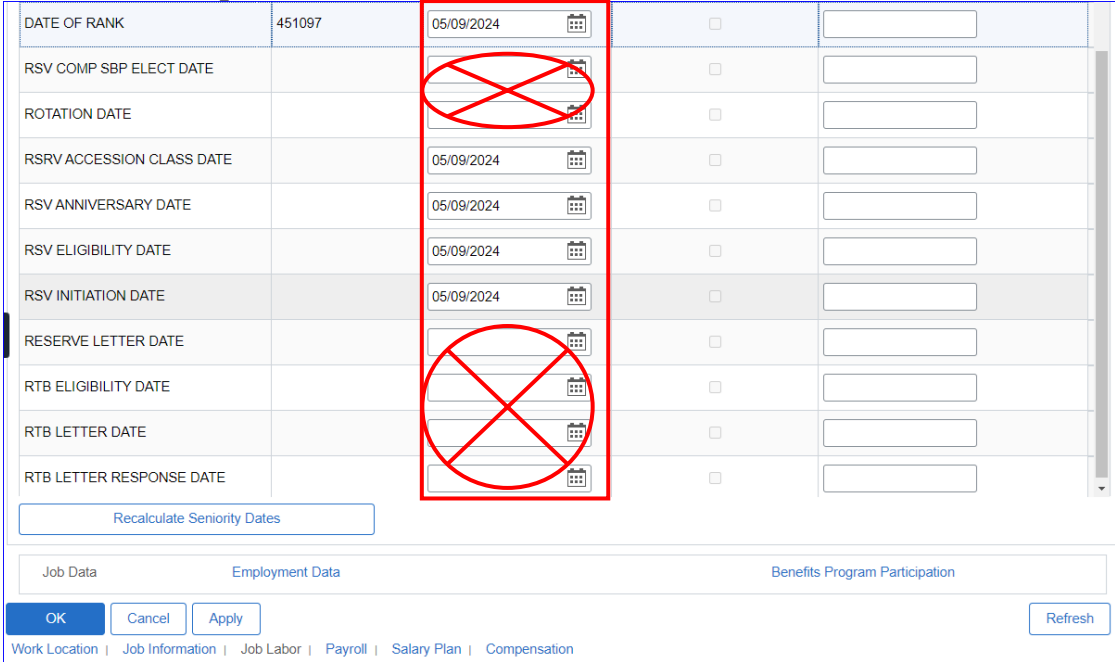
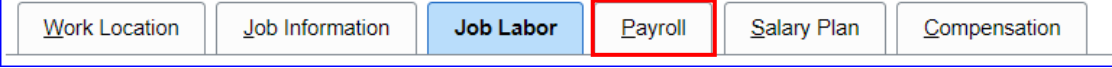
Procedure,  
continued

Step	Action																																																																	
29	<p>Only enter dates as indicated. <b>All other fields must be left blank.</b></p> <ul style="list-style-type: none"> <li>• <b>Active Duty Base Date</b> – Date of IADT Start Date/Report Date.</li> <li>• <b>AD Pay Scale Date</b> – Date of IADT Start Date/Report Date.</li> <li>• <b>DEP Date</b> – Leave blank.</li> <li>• <b>CMA Date</b> – Leave blank.</li> <li>• <b>DIEMS Date</b> – Date of IADT Start Date/Report Date.</li> <li>• <b>RSV Drill Obligation Date</b> – Leave blank.</li> <li>• <b>Expected Loss Date</b> – 8 years from the original DIEMS date (minus 1 day)</li> <li>• <b>Job Family Entry Date</b> – Date of Enlistment Contract.</li> <li>• <b>Mil Obligation Compl Date</b> – 8 years from DIEMS date (minus 1 day) unless prior discharge authorized under an approved program (i.e. VOLSEP).</li> <li>• <b>Pay Allowance Date</b> – Date of IADT Start Date/Report Date.</li> <li>• <b>Point Start Date</b> – Leave blank.</li> <li>• <b>Pay Base Date</b> – Date of IADT Start Date/Report Date.</li> </ul> <p><b>NOTE:</b> Submit a request to PPC Customer Care for a Statement of Creditable Service (SOCS) in the case of prior military service. Any necessary adjustments will take place via the SOCS process (see <a href="#">E-Mail ALSPO B/15</a>).</p> <div data-bbox="300 1173 1420 1910" style="border: 1px solid black; padding: 5px;"> <p>Assigned Seniority Dates <span style="float: right;">1-23 of 23   View 5</span></p> <table border="1"> <thead> <tr> <th>Seniority Date</th> <th>Control Value</th> <th>Labor Seniority Date</th> <th>Override</th> <th>Override Reason</th> </tr> </thead> <tbody> <tr> <td>ACTIVE DUTY BASE DATE</td> <td></td> <td>05/09/2024</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>AD PAY SCALE DATE</td> <td></td> <td>05/09/2024</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>DEP DATE</td> <td></td> <td><del>05/09/2024</del></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>CMA DATE</td> <td></td> <td><del>05/09/2024</del></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>DIEMS DATE</td> <td></td> <td>05/09/2024</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>RSV DRILL OBLIGATION DATE</td> <td></td> <td><del>05/09/2024</del></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>EXPECTED LOSS DATE</td> <td></td> <td>05/08/2032</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>JOB FAMILY ENTRY DATE</td> <td></td> <td>05/09/2024</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>MIL OBLIGATION COMPL DATE</td> <td></td> <td>05/08/2032</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>PAY ALLOWANCE DATE</td> <td></td> <td>05/09/2024</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>POINT START DATE</td> <td></td> <td><del>05/09/2024</del></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>PAY BASE DATE</td> <td></td> <td>05/09/2024</td> <td><input type="checkbox"/></td> <td></td> </tr> </tbody> </table> </div>	Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason	ACTIVE DUTY BASE DATE		05/09/2024	<input checked="" type="checkbox"/>		AD PAY SCALE DATE		05/09/2024	<input checked="" type="checkbox"/>		DEP DATE		<del>05/09/2024</del>	<input type="checkbox"/>		CMA DATE		<del>05/09/2024</del>	<input type="checkbox"/>		DIEMS DATE		05/09/2024	<input checked="" type="checkbox"/>		RSV DRILL OBLIGATION DATE		<del>05/09/2024</del>	<input type="checkbox"/>		EXPECTED LOSS DATE		05/08/2032	<input checked="" type="checkbox"/>		JOB FAMILY ENTRY DATE		05/09/2024	<input checked="" type="checkbox"/>		MIL OBLIGATION COMPL DATE		05/08/2032	<input checked="" type="checkbox"/>		PAY ALLOWANCE DATE		05/09/2024	<input type="checkbox"/>		POINT START DATE		<del>05/09/2024</del>	<input type="checkbox"/>		PAY BASE DATE		05/09/2024	<input type="checkbox"/>	
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## Accessing the Member, Continued

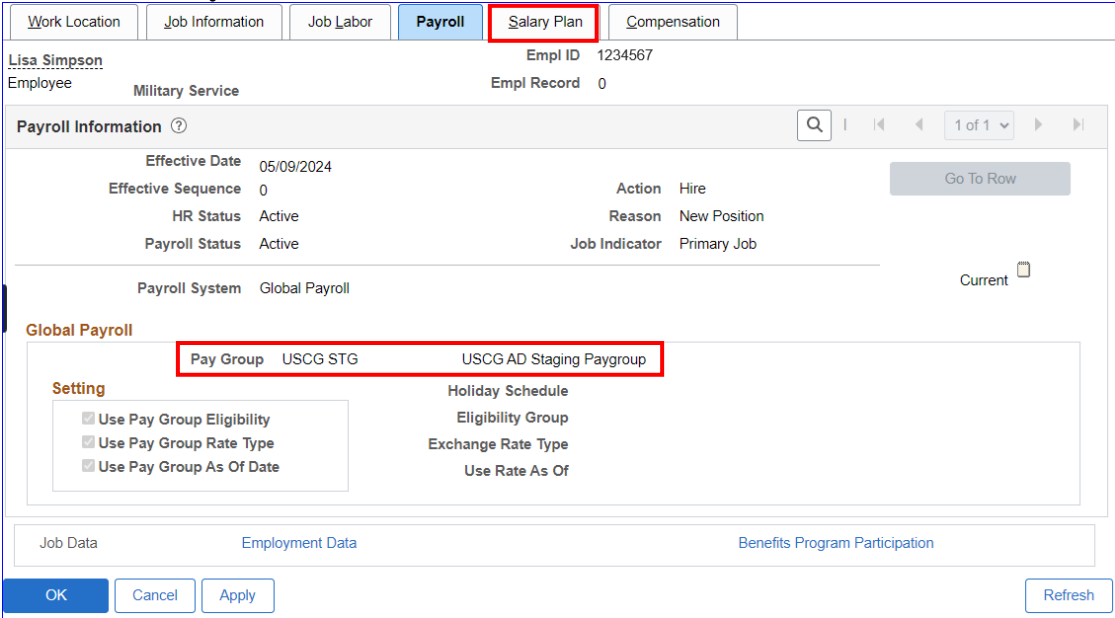
Procedure,  
continued

Step	Action																																																							
<p><b>29</b> <b>Cont.</b></p>	<ul style="list-style-type: none"> <li>• <b>Date of Rank</b> – Auto-populates Date of Enlistment Contract along with the Control Value.</li> <li>• <b>RSV Comp SBP Elect Date</b> – Leave blank.</li> <li>• <b>Rotation Date</b> – Leave blank.</li> <li>• <b>Rsrv Accession Class Date</b> – Date of Enlistment Contract.</li> <li>• <b>RSV Anniversary Date</b> – Date of Enlistment Contract.</li> <li>• <b>RSV Eligibility Date</b> – Date of Enlistment Contract.</li> <li>• <b>RSV Initiation Date</b> – Date of Enlistment Contract.</li> <li>• <b>Reserve Letter Date</b> – Leave blank.</li> <li>• <b>RTB Eligibility Date</b> – Leave blank.</li> <li>• <b>RTB Letter Date</b> – Leave blank.</li> <li>• <b>RTB Letter Response Date</b> – Leave blank</li> </ul>  <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">DATE OF RANK</td> <td style="width: 15%;">451097</td> <td style="width: 15%;">05/09/2024</td> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 35%;"></td> </tr> <tr> <td>RSV COMP SBP ELECT DATE</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>ROTATION DATE</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RSRV ACCESSION CLASS DATE</td> <td></td> <td>05/09/2024</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RSV ANNIVERSARY DATE</td> <td></td> <td>05/09/2024</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RSV ELIGIBILITY DATE</td> <td></td> <td>05/09/2024</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RSV INITIATION DATE</td> <td></td> <td>05/09/2024</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RESERVE LETTER DATE</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RTB ELIGIBILITY DATE</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RTB LETTER DATE</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>RTB LETTER RESPONSE DATE</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> </table> <p style="text-align: center; margin-top: 5px;">Recalculate Seniority Dates</p> <p style="margin-top: 5px;"> <span>Job Data</span>      <span>Employment Data</span>      <span>Benefits Program Participation</span> </p> <p style="margin-top: 5px;"> <input type="button" value="OK"/>    <input type="button" value="Cancel"/>    <input type="button" value="Apply"/>      <input type="button" value="Refresh"/> </p> <p style="font-size: small; margin-top: 5px;"> <a href="#">Work Location</a>   <a href="#">Job Information</a>   <a href="#">Job Labor</a>   <a href="#">Payroll</a>   <a href="#">Salary Plan</a>   <a href="#">Compensation</a> </p>	DATE OF RANK	451097	05/09/2024	<input type="checkbox"/>		RSV COMP SBP ELECT DATE			<input type="checkbox"/>		ROTATION DATE			<input type="checkbox"/>		RSRV ACCESSION CLASS DATE		05/09/2024	<input type="checkbox"/>		RSV ANNIVERSARY DATE		05/09/2024	<input type="checkbox"/>		RSV ELIGIBILITY DATE		05/09/2024	<input type="checkbox"/>		RSV INITIATION DATE		05/09/2024	<input type="checkbox"/>		RESERVE LETTER DATE			<input type="checkbox"/>		RTB ELIGIBILITY DATE			<input type="checkbox"/>		RTB LETTER DATE			<input type="checkbox"/>		RTB LETTER RESPONSE DATE			<input type="checkbox"/>	
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<p><b>30</b></p>	<p>Select the <b>Payroll</b> Tab.</p>  <p style="text-align: center;"> <input type="button" value="Work Location"/>    <input type="button" value="Job Information"/>    <input type="button" value="Job Labor"/>    <input style="border: 2px solid red;" type="button" value="Payroll"/>    <input type="button" value="Salary Plan"/>    <input type="button" value="Compensation"/> </p>																																																							

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# Accessing the Member, Continued

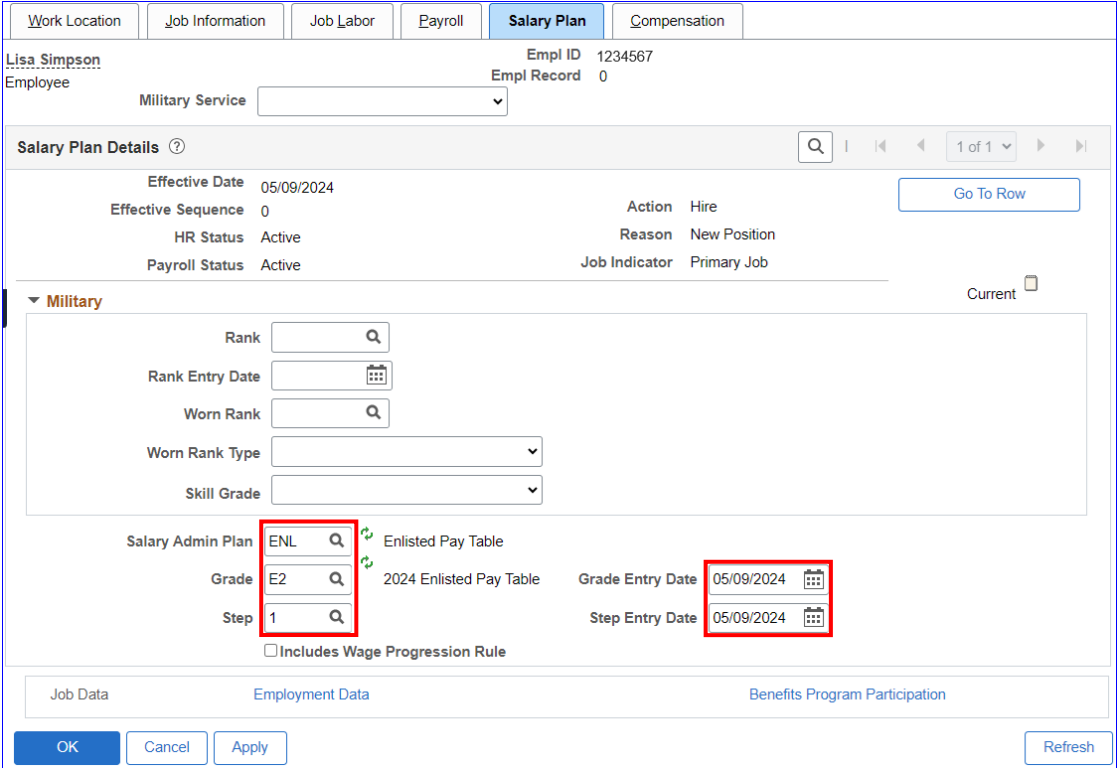
Procedure,  
continued

Step	Action
31	<p><b>Pay Group</b> should default to USCG STG. Once the hire has been approved this will update to USCG RSV (USCG Reservist).</p> <p>Select the <b>Salary Plan</b> tab.</p>  <p>The screenshot shows the 'Salary Plan' tab selected. The 'Pay Group' is 'USCG STG' and the 'USCG AD Staging Paygroup' is highlighted. The 'Global Payroll' section shows settings for 'Use Pay Group Eligibility', 'Use Pay Group Rate Type', and 'Use Pay Group As Of Date'.</p>

*Continued on next page*

## Accessing the Member, Continued

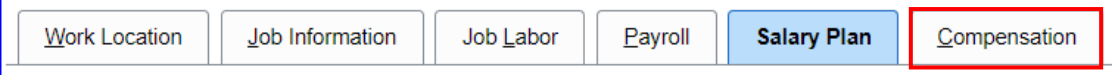
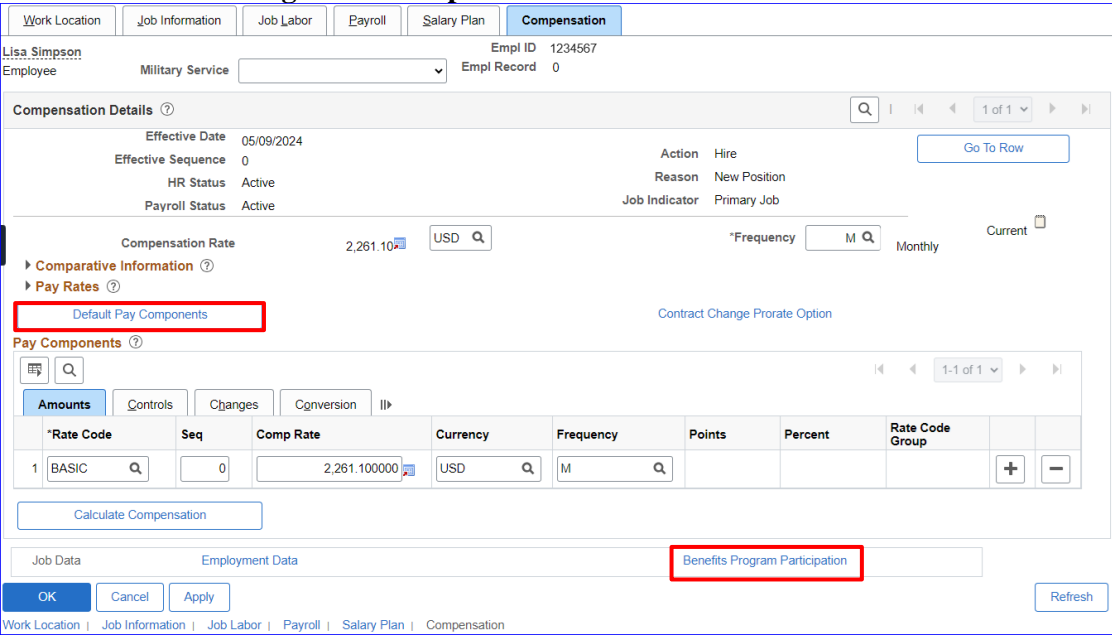
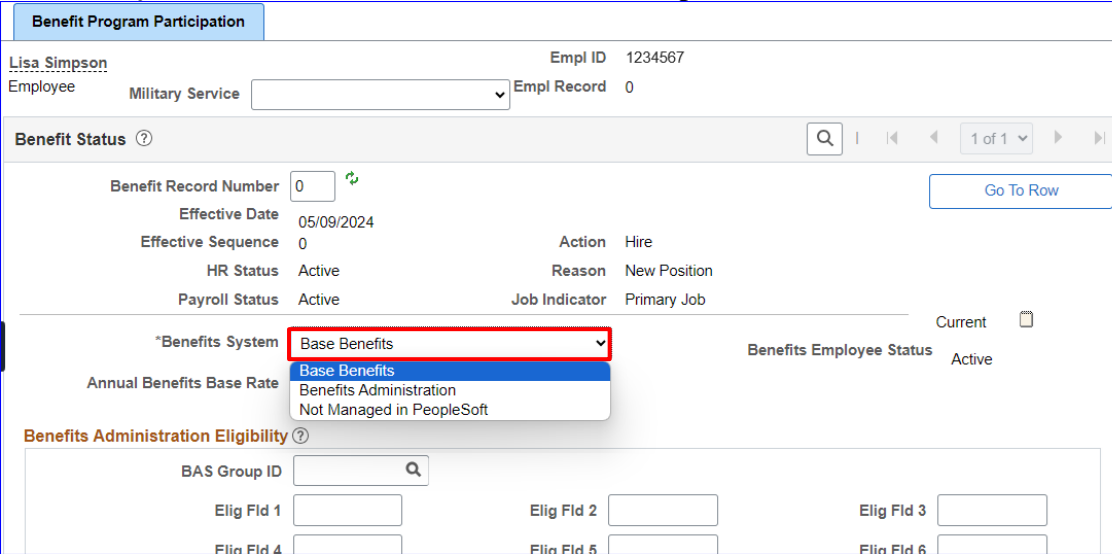
Procedure,  
continued

Step	Action
32	<p>Only enter fields as indicated. <b>All other fields must be left blank.</b></p> <ul style="list-style-type: none"> <li>• <b>Salary Admin Plan</b> – Select ENL from the lookup icon.</li> <li>• <b>Grade</b> – Defaults to the Pay Grade based on the Job Code entered on the Job Information Tab. If the member is being accessed at a different grade, click the lookup icon, and select the appropriate Grade.</li> <li>• <b>Grade Entry Date</b> – Should default to the date of hire.</li> <li>• <b>Step</b> – Enter 1 and hit tab.</li> </ul> <p><b>NOTE:</b> If the Job Code number does not match the Grade and Step – An error message is received during approval and be fixed.</p> <p><b>NOTE: This step is necessary for the information on the Compensation tab to populate.</b></p> <ul style="list-style-type: none"> <li>• <b>Step Entry Date</b> – Needs to be updated to match the same date listed as the Pay Base Date.</li> </ul> 

*Continued on next page*

# Accessing the Member, Continued

Procedure,  
continued

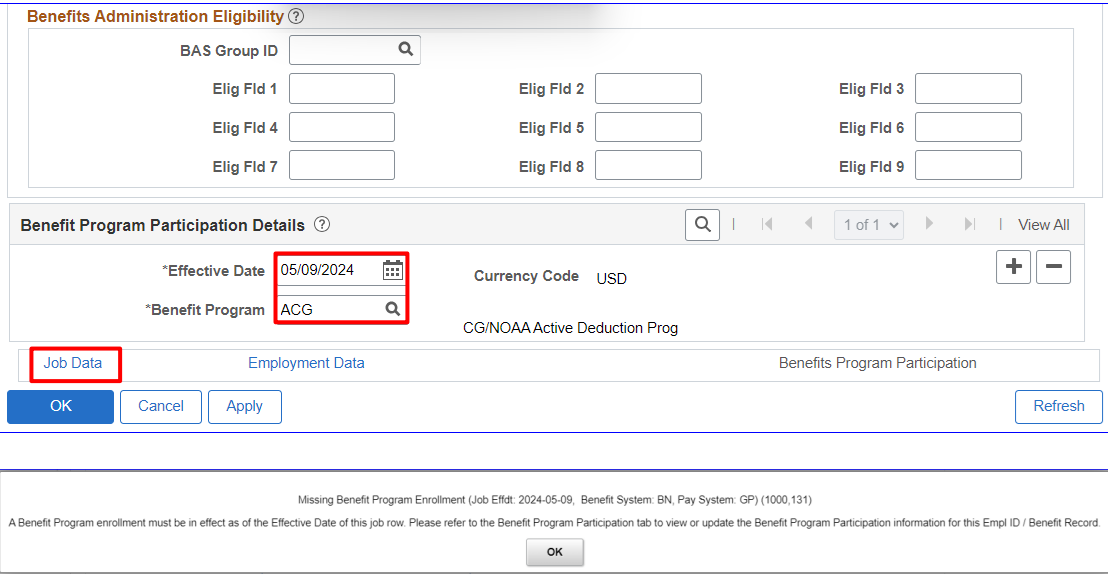
Step	Action
33	<p>Select the <b>Compensation</b> tab.</p> 
34	<p>Click <b>Default Pay Components</b> (this updates the Compensation Rate and Frequency data). Click the <b>Benefits Program Participation</b> link.</p> 
35	<p><b>Benefits System</b> – Select Base Benefits from the drop-down.</p> 

*Continued on next page*



## Accessing the Member, Continued

Procedure,  
continued

Step	Action
<p><b>35 Cont.</b></p>	<ul style="list-style-type: none"> <li>• <b>Effective Date</b> – If completing the Job Data AFTER the effective date of hire, change the date to the date of hire or you will receive the warning shown below when trying to submit for approval.</li> <li>• <b>Benefit Program</b> – Select ACG from the lookup icon.</li> </ul> <p>Click the <b>Job Data</b> link.</p> 

*Continued on next page*

# Accessing the Member, Continued

Procedure,  
continued

Step	Action
<p><b>36</b></p>	<p><b>To submit, click OK.</b></p> <div data-bbox="300 521 1420 1449"> <p> <a href="#">Work Location</a>   <a href="#">Job Information</a>   <a href="#">Job Labor</a>   <a href="#">Payroll</a>   <a href="#">Salary Plan</a>   <a href="#">Compensation</a> </p> <p> <b>Lisa Simpson</b>                      Employee      Empl ID 1234567                      Empl Record 0                 </p> <p>                     Military Service <input type="text"/> </p> <p> <b>Work Location Details</b> <span>?</span> <input type="text"/>   1 of 1   <input type="button" value="Go To Row"/> <input type="button" value="+"/> <input type="button" value="-"/> </p> <p>                     *Effective Date <input type="text" value="05/09/2024"/> <input type="button" value="Go To Row"/> </p> <p>                     Effective Sequence <input type="text" value="0"/>      *Action <input type="text" value="Hire"/> </p> <p>                     HR Status Active      Reason <input type="text" value="New Position"/> </p> <p>                     Payroll Status Active      *Job Indicator <input type="text" value="Primary Job"/> </p> <p> <input type="button" value="Calculate Status and Dates"/> </p> <hr/> <p>                     Position Number <input type="text" value="000956887"/> <input type="button" value="Q"/>      ROCI (PRIOR SVC/CIV)      Current <input type="button" value="Q"/> </p> <p> <input type="button" value="Override Position Data"/> </p> <p>                     Position Entry Date <input type="text" value="05/09/2024"/> <input type="button" value="Q"/> </p> <p> <input type="checkbox"/> Position Management Record                 </p> <p>                     Regulatory Region RSV      Reservists                 </p> <p>                     Company ACG      UNITED STATES COAST GUARD                 </p> <p>                     Business Unit ENLCG      Enlisted CG                 </p> <p>                     Department 004750      OFFICER CANDIDATE SCHOOL                 </p> <p>                     Department Entry Date 05/09/2024                 </p> <p>                     Location CT0038      OFFICER CAND SCHOOL                 </p> <p>                     Establishment ID <input type="text" value="USCG"/> <input type="button" value="Q"/>      Active CG      Date Created 05/14/2024                 </p> <hr/> <p>                     Last Start Date <input type="text" value="05/14/2024"/> <input type="button" value="Q"/> </p> <p>                     Expected Job End Date <input type="text"/> <input type="button" value="Q"/> </p> <p> <input type="checkbox"/> <b>Military</b> </p> <p>                     Reserve Class Code <input type="text" value="N"/> <input type="button" value="Q"/>      w/Svc Oblig not in another Cla                 </p> <p>                     Component Category <input type="text"/> <input type="button" value="Q"/> </p> <hr/> <p> <a href="#">Job Data</a>      <a href="#">Employment Data</a>      <a href="#">Benefits Program Participation</a> </p> <p> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> <input type="button" value="Refresh"/> </p> <p> <a href="#">Work Location</a>   <a href="#">Job Information</a>   <a href="#">Job Labor</a>   <a href="#">Payroll</a>   <a href="#">Salary Plan</a>   <a href="#">Compensation</a> </p> </div>

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## Accessing the Member, Continued

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Procedure,  
continued

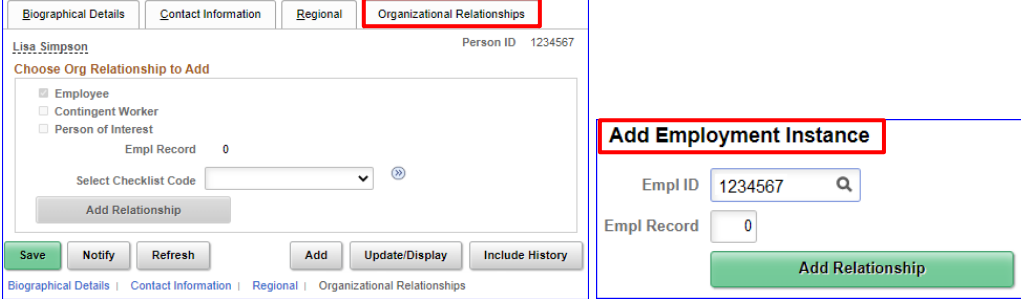
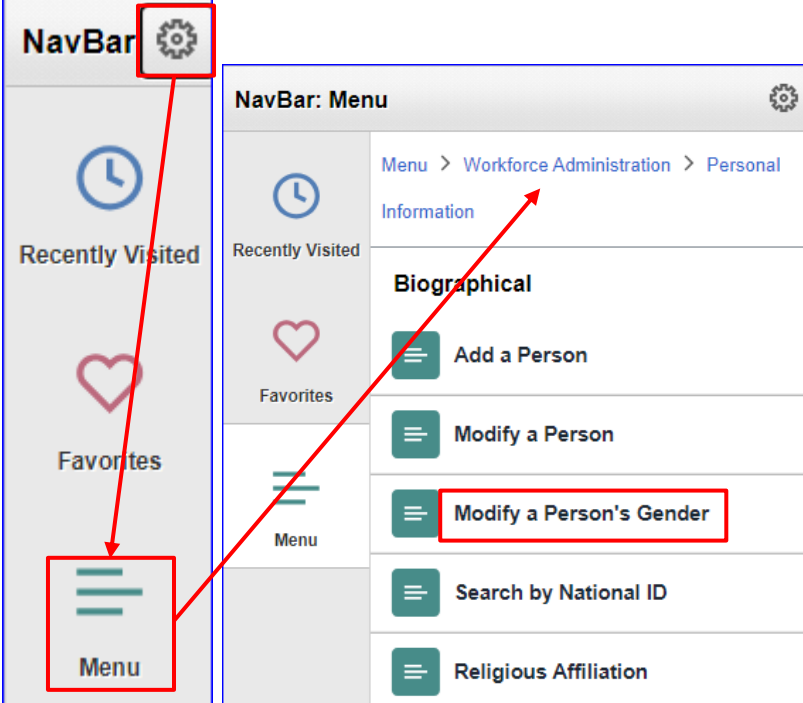
Step	Action
37	<p data-bbox="300 495 1385 562">Several Messages will display (randomly ordered). Click <b>OK</b> for each one (wait for the “processing-circle-of-death” to finish).</p> <div data-bbox="300 562 1422 757"><p data-bbox="320 584 1401 678">Warning -- Hourly Rate is less than the minimum specified in the Salary Grade Table. (1000,32) A minimum hourly rate is specified in the Salary Grade Table, and the hourly rate entered on this panel falls below that minimum. If the specified hourly rate is correct, leave as is. Otherwise, enter the correct hourly rate.</p><p data-bbox="746 689 970 741"><input data-bbox="746 689 858 741" type="button" value="OK"/> <input data-bbox="863 689 970 741" type="button" value="Cancel"/></p></div> <div data-bbox="300 792 1305 1025"><p data-bbox="331 846 1273 880">JOB DATA CMP EMPLID : 1234567 COMPANY ACG ACTION HIR (0,0)</p><p data-bbox="715 913 884 1003"><input data-bbox="715 913 884 1003" type="button" value="OK"/></p></div>

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## Accessing the Member, Continued

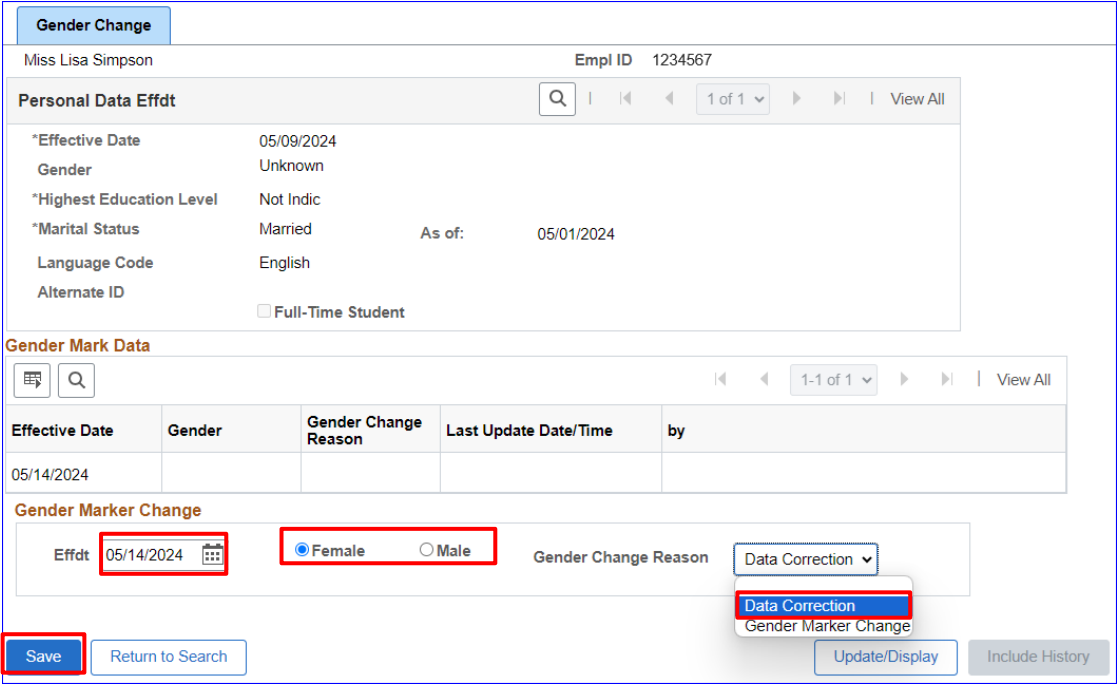
Procedure,  
continued

Step	Action
<p><b>38</b></p>	<p>After a successful completion you will be returned to the <b>Organizational Relationships</b> tab or the <b>Add employee Instance</b> screen. Return to the DA home page.</p> 
<p><b>39</b></p>	<p>If you have the roles to add the member's gender, navigate to the <b>NavBar icon &gt; Menu &gt; Workforce Administration arrow &gt; Personal Information &gt; Biographical &gt; Modify a Person's Gender</b>.</p> <p>If you do not have the roles, a PPC help ticket must be entered to have this information added.</p> 

*Continued on next page*

## Accessing the Member, Continued

Procedure,  
continued

Step	Action
40	<p>The Gender Change tab will display.</p> <p>If entering this on the same day as the Accession, <b>the Gender Marker Change Effdt date must be the day after your date of entry or the current date if entering at a later date. This date cannot be back-dated.</b></p> <p>Select the appropriate <b>Gender</b> radio button and select Data Correction from the <b>Gender Change Reason</b> drop-down (used for entering a new member's gender OR to correct an incorrect gender).</p> <p><b>NOTE: DO NOT USE Gender Marker Change</b> – Used to modify a member who has followed established COMDT Policy and is physically changing genders.</p> <p>Click <b>Save</b>.</p>  <p>The screenshot shows the 'Gender Change' form for Miss Lisa Simpson (Empl ID 1234567). It includes sections for 'Personal Data Effdt' and 'Gender Mark Data'. The 'Gender Marker Change' section has the following fields: Effdt (05/14/2024), Gender (Female selected), Gender Change Reason (Data Correction), and buttons for Save, Return to Search, Update/Display, and Include History.</p>

*Continued on next page*

## Accessing the Member, Continued

Procedure,  
continued

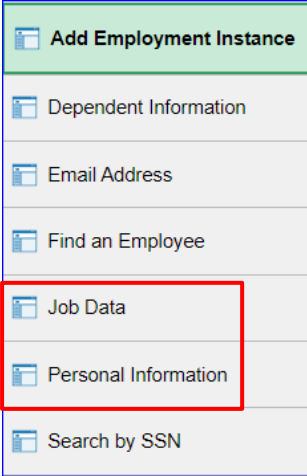
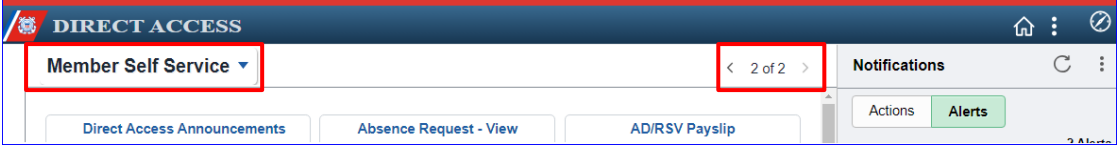
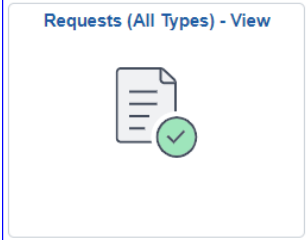
Step	Action										
41	<p>Now showing 1 of 2 rows and <b>Last Updated</b> information.</p> <div data-bbox="304 524 1417 1245"> <p><b>Gender Change</b></p> <p>Miss Lisa Simpson <span style="float: right;">Empl ID 1234567.</span></p> <p><b>Personal Data Effdt</b> <span style="float: right;">1 of 2   View All</span></p> <p>*Effective Date 05/14/2024            Gender Female            *Highest Education Level Not Indic            *Marital Status Married <span style="margin-left: 20px;">As of: 05/01/2024</span>            Language Code English            Alternate ID <input type="checkbox"/> Full-Time Student</p> <p><b>Gender Mark Data</b> <span style="float: right;">1-1 of 1   View All</span></p> <table border="1"> <thead> <tr> <th>Effective Date</th> <th>Gender</th> <th>Gender Change Reason</th> <th>Last Update Date/Time</th> <th>by</th> </tr> </thead> <tbody> <tr> <td>05/14/2024</td> <td>Female</td> <td>Correction</td> <td>05/14/24 11:58:26AM</td> <td>9876543</td> </tr> </tbody> </table> <p><b>Gender Marker Change</b></p> <p>Effdt 05/15/2024 <input type="radio"/> Female <input type="radio"/> Male <span style="margin-left: 20px;">Gender Change Reason</span></p> <p><span>Save</span> <span>Return to Search</span> <span>Update/Display</span> <span>Include History</span></p> </div>	Effective Date	Gender	Gender Change Reason	Last Update Date/Time	by	05/14/2024	Female	Correction	05/14/24 11:58:26AM	9876543
Effective Date	Gender	Gender Change Reason	Last Update Date/Time	by							
05/14/2024	Female	Correction	05/14/24 11:58:26AM	9876543							

# Approving an Accession

**Introduction** This section provides the procedures for approving an Accession in DA.

- Information**
- SPO Auditor/PAO user access is required to approve an accession.
  - The approver cannot be the same person who entered the accession.
  - The member will **NOT be paid** until the accession transaction is approved, the contract is entered and then the contract is approved.

**Procedure** See below.

Step	Action
1	<p>Before approving the accession, review/audit the information by clicking on the <b>Personal Information</b> and the <b>Job Data</b> options.</p> 
2	<p>Navigate to <b>Member Self Service</b> via the drop-down or by page <b>arrows</b>.</p> 
3	<p>Click on the <b>Requests (All Types) - View</b> tile.</p> 

*Continued on next page*

## Approving an Accession, Continued

Procedure,  
continued

Step	Action																				
4	<ul style="list-style-type: none"> <li>• Select the <b>Requests I am Approver For</b> radio button.</li> <li>• <b>Transaction Name</b> – Select Approval/SOD for Accessions option from the drop-down.</li> <li>• <b>Transaction Status</b> – Leave at Pending.</li> </ul> <p>Click <b>Populate Grid</b>.</p> <div data-bbox="300 712 1420 1240" style="border: 1px solid black; padding: 5px;"> <p><b>View My Action Requests</b></p> <p>Milhouse Van Houten</p> <ol style="list-style-type: none"> <li>1. 'My Submitted Requests' allows member to bring up only their Action Requests.</li> <li>2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them.</li> <li>3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them.</li> <li>4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.)</li> <li>5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'.</li> <li>6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.</li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p> <input type="radio"/> My Submitted Requests           <input checked="" type="radio"/> <b>Requests I am Approver For</b> <input type="radio"/> All Requests         </p> <p>Transaction Name: <span style="border: 2px solid red; padding: 2px;">Approval/SOD for Accessions</span></p> <p>Transaction Status: <span style="border: 2px solid red; padding: 2px;">Pending</span></p> <p>Submission From Date: <input type="text"/></p> <p>Submission To Date: <input type="text"/></p> <p style="text-align: right;"> <span style="border: 2px solid red; padding: 2px;">Populate Grid</span> <span style="margin-left: 20px;">Refresh</span> </p> </div> </div>																				
5	<p>Click the <b>Approve/Deny</b> link for the accession you are approving.</p> <div data-bbox="300 1317 1420 1429" style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Transaction Name</th> <th>Status</th> <th>Member</th> <th>Member's Last Name</th> <th>Member's Emplid</th> <th>Member's Deptid</th> <th>Submitted By</th> <th>Approver</th> <th>Submission Date</th> <th>Approve/Deny</th> </tr> </thead> <tbody> <tr> <td>AccessionHire</td> <td>Pending</td> <td>Lisa Simpson</td> <td>Simpson</td> <td>1234567</td> <td>004750</td> <td>Ralph Wiggum</td> <td>Milhouse Van Houten</td> <td>2024/05/14</td> <td style="text-align: center;"><span style="border: 2px solid red; padding: 2px;">Approve/Deny</span></td> </tr> </tbody> </table> </div>	Transaction Name	Status	Member	Member's Last Name	Member's Emplid	Member's Deptid	Submitted By	Approver	Submission Date	Approve/Deny	AccessionHire	Pending	Lisa Simpson	Simpson	1234567	004750	Ralph Wiggum	Milhouse Van Houten	2024/05/14	<span style="border: 2px solid red; padding: 2px;">Approve/Deny</span>
Transaction Name	Status	Member	Member's Last Name	Member's Emplid	Member's Deptid	Submitted By	Approver	Submission Date	Approve/Deny												
AccessionHire	Pending	Lisa Simpson	Simpson	1234567	004750	Ralph Wiggum	Milhouse Van Houten	2024/05/14	<span style="border: 2px solid red; padding: 2px;">Approve/Deny</span>												

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## Approving an Accession, Continued

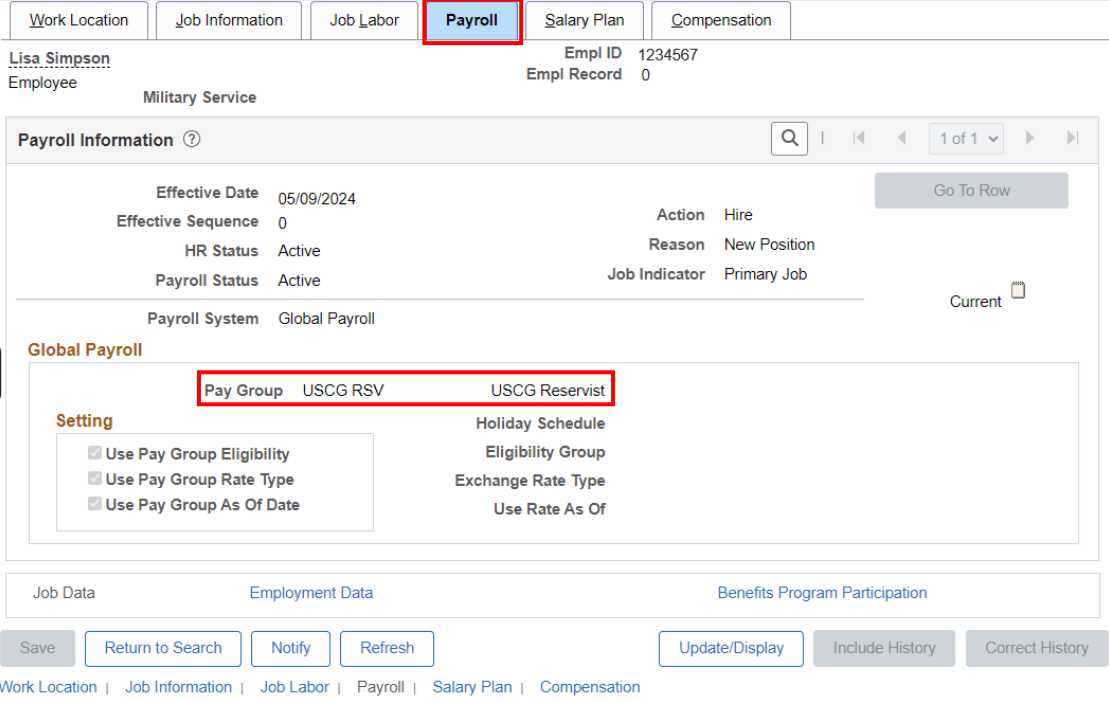
Procedure,  
continued

Step	Action
6	<p>Enter any needed <b>Comments</b> and select either <b>Approve</b> or <b>Deny</b> (deny requires a Comment and returns the accession to the HRS user).</p> <div data-bbox="300 562 1299 1310" style="border: 1px solid black; padding: 5px;"> <p><b>Action Request</b> Approval/SOD for Accessions <u>Simpson,Lisa Marie</u></p> <ul style="list-style-type: none"> <li>Review hire data in the Request Information box.</li> <li>To approve a Hire Request, press the Approve button.</li> <li>To deny a Hire Request, enter a comment and press the Deny button. A Notification will be sent to the originator.</li> <li>After a Hire Request has been approved, data will be pushed to DA 8.0.</li> </ul> <p><b>Request Details</b></p> <p>Employee ID: 1234567</p> <p><b>Request URL</b> <a href="#">Click here to view additional request information.</a></p> <p><b>Request Approvers</b></p> <p>Approver: 9876543 Milhouse Van Houten</p> <p>Comment: <input type="text" value="Approved for hire."/></p> <p><input type="button" value="Approve"/> <input type="button" value="Deny"/></p> <p><b>Accessions Hire Approval</b></p> <div style="border: 1px solid gray; padding: 5px;"> <p>Accession Hire Request: Pending</p> <p>One Approval level</p> <p>Pending</p> <p>Milhouse Van Houten Initial Approve Action Request</p> </div> </div>
7	<p>Once <b>Approved</b>, the buttons will be greyed out. Click the X to close the page.</p> <div data-bbox="300 1370 1420 1870" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"><input type="button" value="Approve"/> <input type="button" value="Deny"/></p> <p><b>Accessions Hire Approval</b></p> <div style="border: 1px solid gray; padding: 5px;"> <p>Accession Hire Request: <b>Approved</b> <span style="float: right;">View/Hide Comments</span></p> <p>One Approval level</p> <div style="border: 1px solid green; padding: 5px; background-color: #e6ffe6;"> <p><b>Approved</b></p> <p>Milhouse Van Houten Initial Approve Action Request 05/14/24 - 12:08 PM</p> </div> <p><b>Comments</b></p> <p>Milhouse Van Houten at 05/14/24 - 12:08 PM Approved for hire.</p> </div> </div>

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# Approving an Accession, Continued


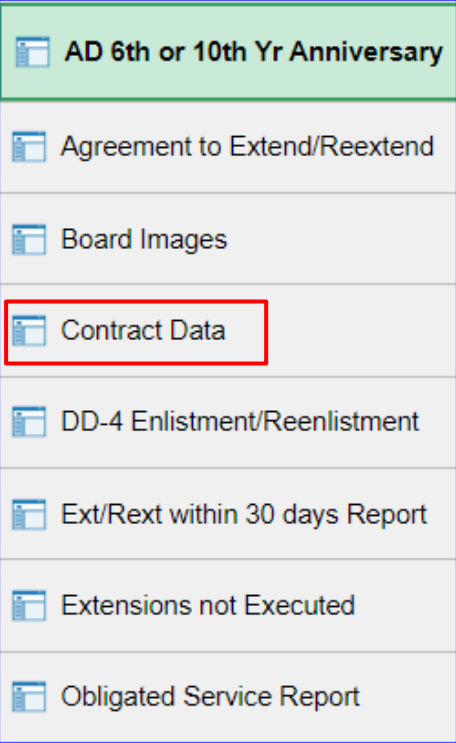
Procedure,  
continued

Step	Action
8	<p>Return to the Job Data <b>Payroll</b> tab to confirm the members <b>Pay Group</b> has changed to USCG RSV and repeat the process for the next accession approval.</p>  <p>The screenshot displays the 'Payroll' tab for employee Lisa Simpson. The 'Pay Group' is set to 'USCG RSV' (USCG Reservist). The interface includes a 'Setting' section with checkboxes for 'Use Pay Group Eligibility', 'Use Pay Group Rate Type', and 'Use Pay Group As Of Date'. The 'Payroll Information' section shows an effective date of 05/09/2024 and a status of 'Active'. The 'Global Payroll' section is also visible.</p>

# Entering Contract Data

**Introduction** This section provides the procedures for completing the contract of a member (in this example with no prior service).

**Procedure** See below.

Step	Action
1	<p>Click on the <b>Career Management</b> tile.</p> 
2	<p>Select the <b>Contract Data</b> option.</p> 

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## Entering Contract Data, Continued

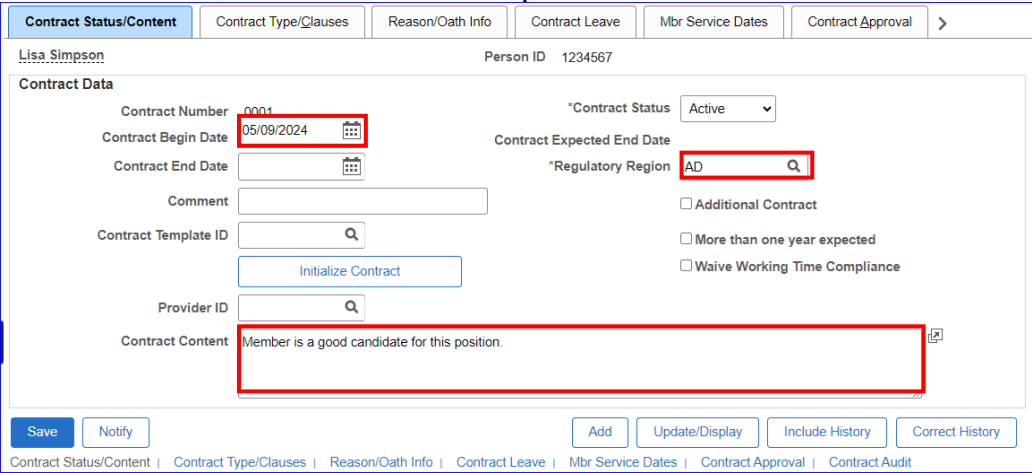
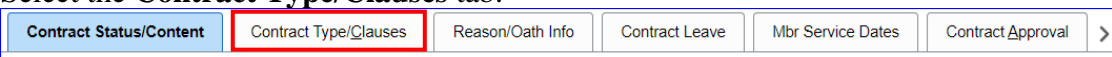
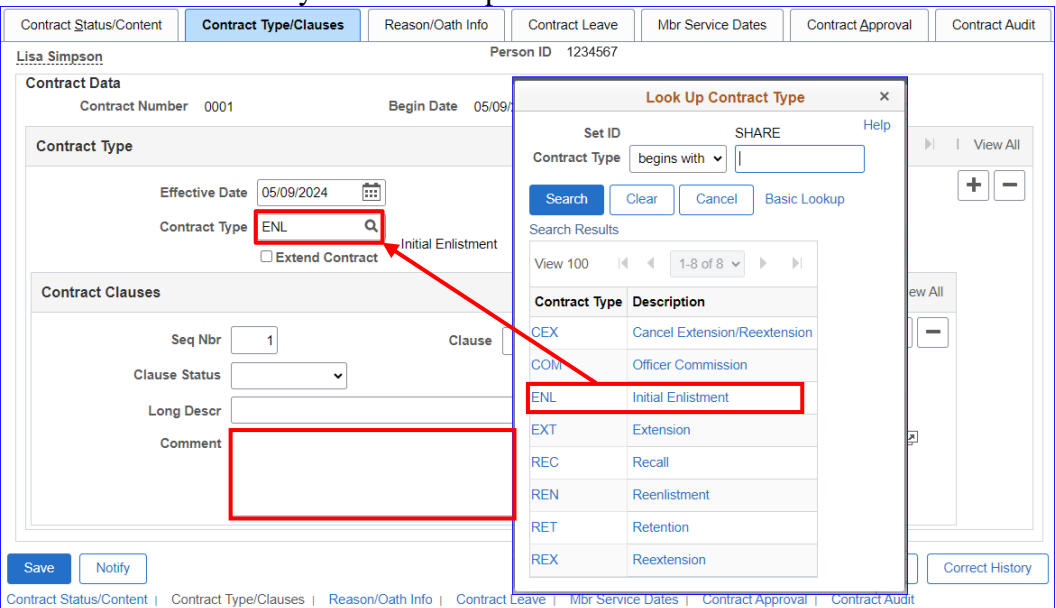
Procedure,  
continued

Step	Action
3	<p>Select the <b>Add a New Value</b> tab.</p> <div data-bbox="304 495 1257 1303" style="border: 1px solid blue; padding: 5px;"> <p><b>Update Contracts</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input style="border: 2px solid red;" type="button" value="Add a New Value"/> </p> <p>▼ <b>Search Criteria</b></p> <p>Empl ID <input type="text" value="begins with"/> <input type="text"/> <input type="button" value="Q"/></p> <p>Contract Number <input type="text" value="begins with"/> <input type="text"/></p> <p>Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Last Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Second Last Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Alternate Character Name <input type="text" value="begins with"/> <input type="text"/></p> <p> <input checked="" type="checkbox"/> Include History           <input type="checkbox"/> Correct History           <input type="checkbox"/> Case Sensitive         </p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/> </p> <p> <a href="#">Find an Existing Value</a>   <a href="#">Add a New Value</a> </p> </div>
4	<p>Enter the <b>Empl ID</b> and the <b>Contract Number</b> (Ex. 001). Click <b>Add</b>.</p> <div data-bbox="304 1368 882 1767" style="border: 1px solid blue; padding: 5px;"> <p><b>Update Contracts</b></p> <p> <input type="button" value="Find an Existing Value"/> <input style="border: 2px solid red;" type="button" value="Add a New Value"/> </p> <p>*Empl ID <input style="border: 2px solid red;" type="text" value="1234567"/> <input type="button" value="Q"/></p> <p>*Contract Number <input style="border: 2px solid red;" type="text" value="001"/></p> <p><input style="border: 2px solid red;" type="button" value="Add"/></p> <p> <a href="#">Find an Existing Value</a>   <a href="#">Add a New Value</a> </p> </div>

*Continued on next page*

# Entering Contract Data, Continued


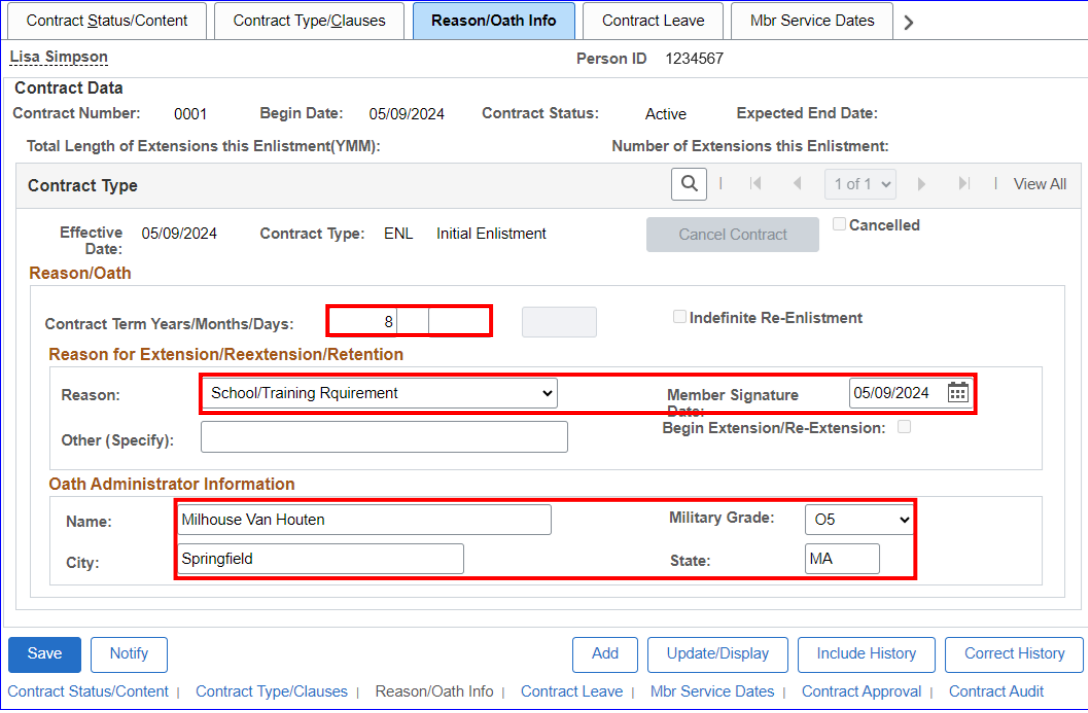

Procedure,  
continued

Step	Action
<p><b>5</b></p>	<p>The Contract Status/Content tab displays with the <b>Contract Number</b> (Ex. 0001).</p> <ul style="list-style-type: none"> <li>• <b>Contract Begin Date</b> – Ensure it is the date of hire.</li> <li>• <b>Regulatory Region</b> – Select AD from the lookup icon.</li> <li>• <b>Contract Content</b> – A statement is required.</li> </ul> 
<p><b>6</b></p>	<p>Select the <b>Contract Type/Clauses</b> tab.</p> 
<p><b>7</b></p>	<ul style="list-style-type: none"> <li>• <b>Contract Type</b> – Select ENL from the lookup icon.</li> <li>• <b>Comment</b> – Enter any contractual specific reasons.</li> </ul> 

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## Entering Contract Data, Continued

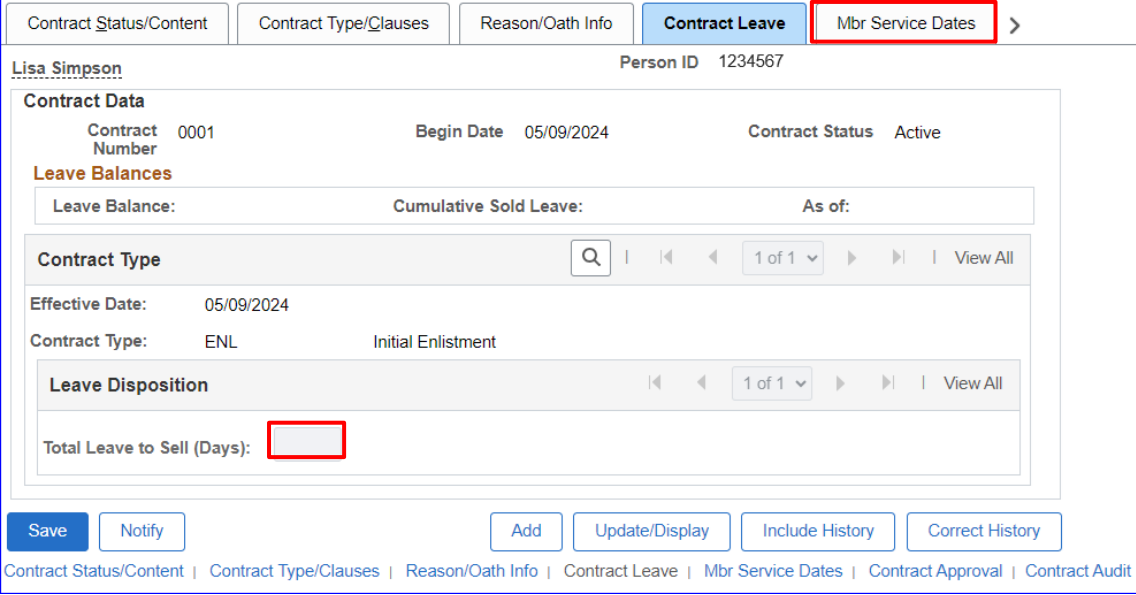
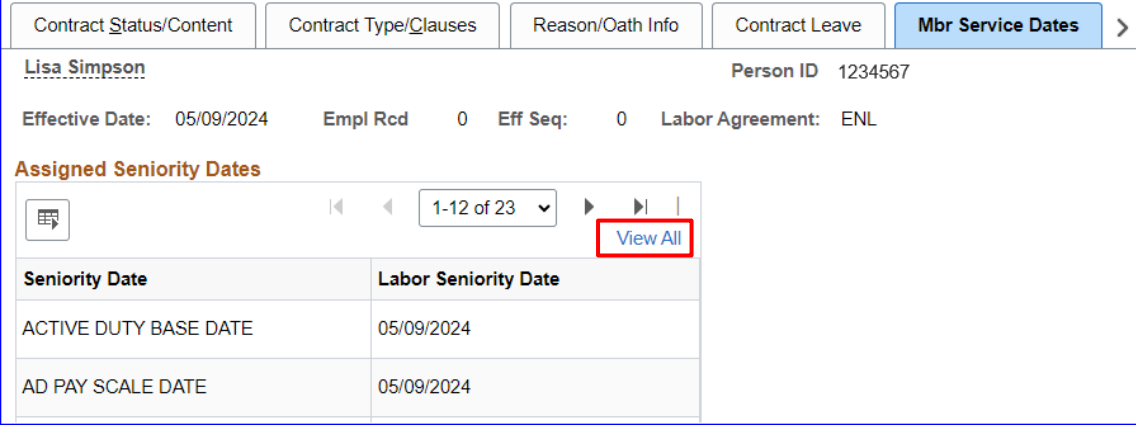
Procedure,  
continued

Step	Action
8	<p>Select the <b>Reason/Oath Info</b> tab.</p> 
9	<ul style="list-style-type: none"> <li>• <b>Contract Term Years/Months/Days</b> – Enter the contract term (in this example 8 years).</li> <li>• <b>Reason</b> – Select from the drop-down IAW Enlistments, Evaluations, and Advancements, COMDTINST M1000.2, Chap 1.F.1.a, <b>this field needs to reflect the actual reason for the service obligation.</b></li> <li>• <b>Member Signature Date</b> – Enter the date the contract was signed.</li> <li>• <b>Name</b> – Enter the name of the Oath Administrator (can be a Notary, Court Clerk or Judge).</li> <li>• <b>Military Grade</b> – Enter the rank of the Oath Administrator (leave blank if non-military).</li> <li>• <b>City</b> – Enter the City in which the contract was signed.</li> <li>• <b>State</b> – Enter the State in which the contract was signed.</li> </ul> 
10	<p>Select the <b>Contract Leave</b> tab.</p> 

Continued on next page

# Entering Contract Data, Continued

Procedure,  
continued

Step	Action
<p><b>11</b></p>	<p><b>Total Leave to Sell (Days) – Greyed out for ROCI hires.</b></p> <p>Select the <b>Mbr Service Dates</b> tab.</p>  <p>The screenshot shows the 'Mbr Service Dates' tab selected. The 'Total Leave to Sell (Days)' field is greyed out and highlighted with a red box. The 'Mbr Service Dates' tab is also highlighted with a red box. The interface includes fields for Contract Number (0001), Begin Date (05/09/2024), and Contract Status (Active). There are also sections for Leave Balances, Contract Type, and Leave Disposition.</p>
<p><b>12</b></p>	<p><b>Click View All on the Assigned Seniority Dates.</b></p>  <p>The screenshot shows the 'Assigned Seniority Dates' tab selected. The 'View All' button is highlighted with a red box. The interface includes fields for Effective Date (05/09/2024), Empl Rcd (0), Eff Seq (0), and Labor Agreement (ENL). There is a table with columns for Seniority Date and Labor Seniority Date, showing ACTIVE DUTY BASE DATE and AD PAY SCALE DATE both set to 05/09/2024.</p>

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# Entering Contract Data, Continued

Procedure,  
continued

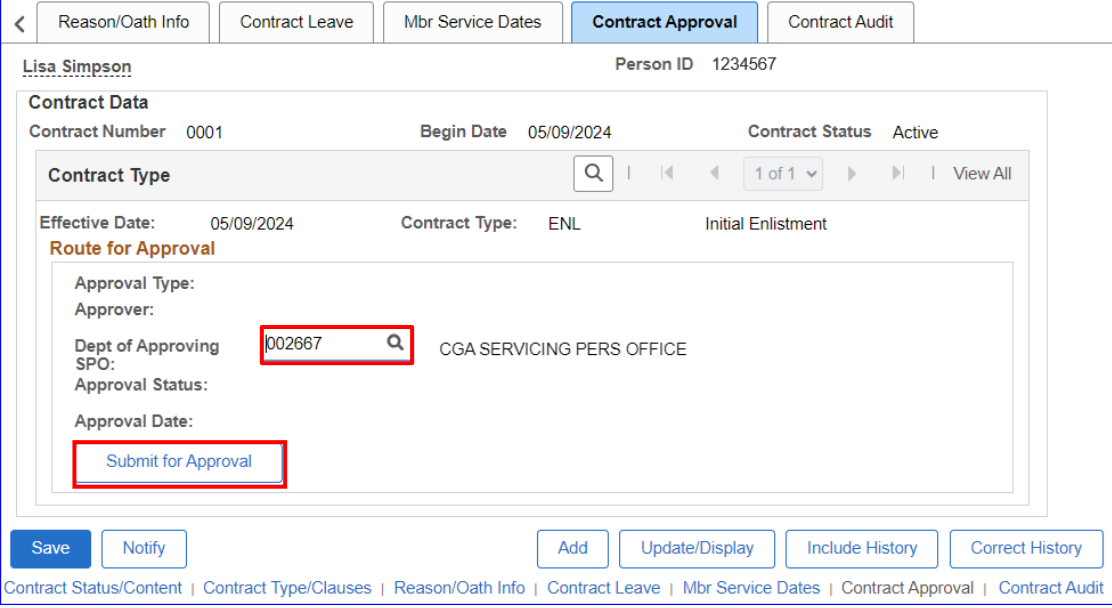
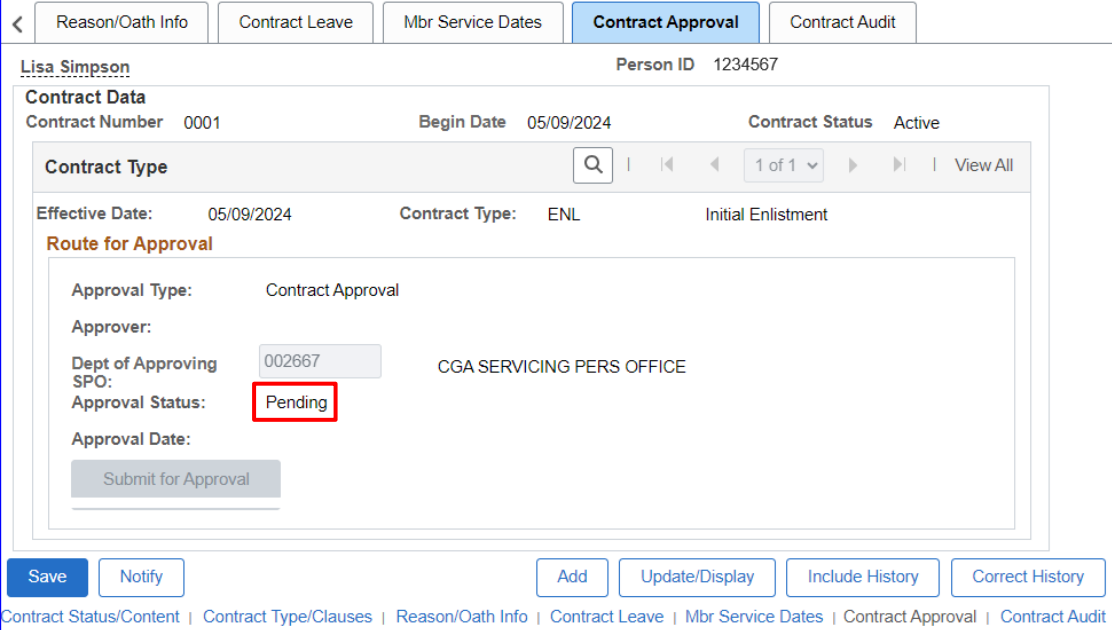
Step	Action																																																
<p><b>13</b></p>	<p>Confirm <b>Labor Seniority Dates</b> set during the Accession process are correct. If not, return to Job Data for corrections before proceeding.</p> <div data-bbox="311 560 880 1444" style="border: 1px solid black; padding: 5px;"> <p><b>Assigned Seniority Dates</b></p> <p>1-23 of 23   View 12</p> <table border="1"> <thead> <tr> <th>Seniority Date</th> <th>Labor Seniority Date</th> </tr> </thead> <tbody> <tr><td>ACTIVE DUTY BASE DATE</td><td>05/09/2024</td></tr> <tr><td>AD PAY SCALE DATE</td><td>05/09/2024</td></tr> <tr><td>DEP DATE</td><td></td></tr> <tr><td>CMA DATE</td><td></td></tr> <tr><td>DIEMS DATE</td><td>05/09/2024</td></tr> <tr><td>RSV DRILL OBLIGATION DATE</td><td></td></tr> <tr><td>EXPECTED LOSS DATE</td><td>05/08/2032</td></tr> <tr><td>JOB FAMILY ENTRY DATE</td><td>05/09/2024</td></tr> <tr><td>MIL OBLIGATION COMPL DATE</td><td>05/08/2032</td></tr> <tr><td>PAY ALLOWANCE DATE</td><td>05/09/2024</td></tr> <tr><td>POINT START DATE</td><td></td></tr> <tr><td>PAY BASE DATE</td><td>05/09/2024</td></tr> <tr><td>DATE OF RANK</td><td>05/09/2024</td></tr> <tr><td>RSV COMP SBP ELECT DATE</td><td></td></tr> <tr><td>ROTATION DATE</td><td></td></tr> <tr><td>RSRV ACCESSION CLASS DATE</td><td>05/09/2024</td></tr> <tr><td>RSV ANNIVERSARY DATE</td><td>05/09/2024</td></tr> <tr><td>RSV ELIGIBILITY DATE</td><td>05/09/2024</td></tr> <tr><td>RSV INITIATION DATE</td><td>05/09/2024</td></tr> <tr><td>RESERVE LETTER DATE</td><td></td></tr> <tr><td>RTB ELIGIBILITY DATE</td><td></td></tr> <tr><td>RTB LETTER DATE</td><td></td></tr> <tr><td>RTB LETTER RESPONSE DATE</td><td></td></tr> </tbody> </table> <p>Save   Notify   Add   Update/Display   Include History   Correct History</p> <p><a href="#">Contract Status/Content</a>   <a href="#">Contract Type/Clauses</a>   <a href="#">Reason/Oath Info</a>   <a href="#">Contract Leave</a>   <a href="#">Mbr Service Dates</a>   <a href="#">Contract Approval</a>   <a href="#">Contract Audit</a></p> </div>	Seniority Date	Labor Seniority Date	ACTIVE DUTY BASE DATE	05/09/2024	AD PAY SCALE DATE	05/09/2024	DEP DATE		CMA DATE		DIEMS DATE	05/09/2024	RSV DRILL OBLIGATION DATE		EXPECTED LOSS DATE	05/08/2032	JOB FAMILY ENTRY DATE	05/09/2024	MIL OBLIGATION COMPL DATE	05/08/2032	PAY ALLOWANCE DATE	05/09/2024	POINT START DATE		PAY BASE DATE	05/09/2024	DATE OF RANK	05/09/2024	RSV COMP SBP ELECT DATE		ROTATION DATE		RSRV ACCESSION CLASS DATE	05/09/2024	RSV ANNIVERSARY DATE	05/09/2024	RSV ELIGIBILITY DATE	05/09/2024	RSV INITIATION DATE	05/09/2024	RESERVE LETTER DATE		RTB ELIGIBILITY DATE		RTB LETTER DATE		RTB LETTER RESPONSE DATE	
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RTB LETTER RESPONSE DATE																																																	
<p><b>14</b></p>	<p>Select the <b>Contract Approval</b> tab.</p> <div data-bbox="300 1608 1420 1675" style="border: 1px solid black; padding: 5px;"> <p>Reason/Oath Info   Contract Leave   <b>Mbr Service Dates</b>   <b>Contract Approval</b>   Contract Audit</p> </div>																																																

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# Entering Contract Data, Continued

Procedure,  
continued

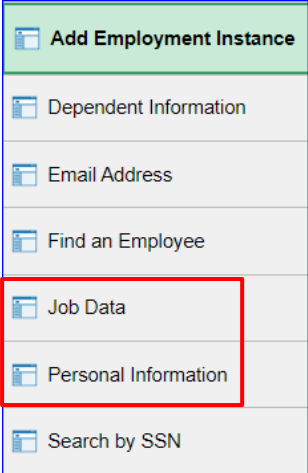
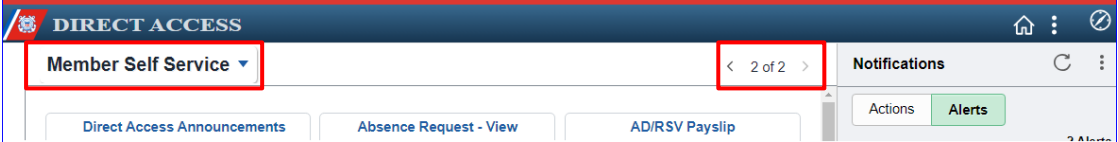
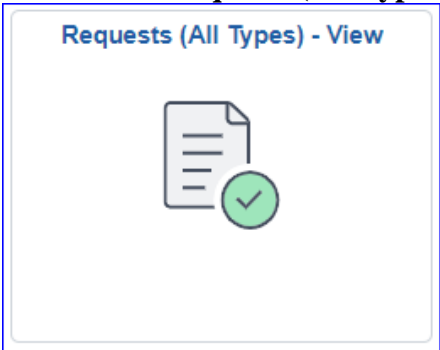
Step	Action
<p><b>15</b></p>	<p><b>Update Dept of Approving SPO (if necessary). Click Submit for Approval.</b></p> 
<p><b>16</b></p>	<p><b>The Approval Status updates to Pending and the contract will be routed to the Approving SPO.</b></p> 

# Approving a Contract

**Introduction** This section provides the procedures for approving a contract.

- Information**
- SPO Auditor/PAO user access is required to approve a contract.
  - The approver cannot be the same person who entered the contract.
  - The member will **NOT be paid** until the contract is entered and then approved.

**Procedure** See below.

Step	Action
1	<p>Before approving the accession, review/audit the information by clicking on the <b>Personal Information</b> and the <b>Job Data</b> options.</p> 
2	<p>Navigate to <b>Member Self Service</b> via the drop-down or by page <b>arrows</b>.</p> 
3	<p>Click on the <b>Requests (All Types) - View</b> tile.</p> 

*Continued on next page*

## Approving a Contract, Continued

Procedure,  
continued

Step	Action																																								
3	<ul style="list-style-type: none"> <li>• Select the <b>Requests I am Approver For</b> radio button.</li> <li>• <b>Transaction Name</b> – Select Contract Approval from the drop-down.</li> <li>• <b>Transaction Status</b> – Leave at Pending.</li> </ul> <p>Click <b>Populate Grid</b>.</p> <div data-bbox="300 645 1422 1167" style="border: 1px solid black; padding: 5px;"> <p><b>View My Action Requests</b></p> <p>Milhouse Van Houten</p> <p>1. 'My Submitted Requests' allows member to bring up only their Action Requests.                  2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them.                  3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them.                  4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.)                  5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'.                  6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.</p> <p> <input type="radio"/> My Submitted Requests                          <input checked="" type="radio"/> Requests I am Approver For                          <input type="radio"/> All Requests                 </p> <p>Transaction Name: <span style="border: 1px solid red; padding: 2px;">Contract Approval</span> ▼</p> <p>Transaction Status: <span style="border: 1px solid red; padding: 2px;">Pending</span> ▼</p> <p>Submission From Date: <input type="text"/> </p> <p>Submission To Date: <input type="text"/> </p> <p style="text-align: right;"> <span style="border: 1px solid red; padding: 2px;">Populate Grid</span>                          <input type="button" value="Refresh"/> </p> </div>																																								
4	<p>Click the <b>Approve/Deny</b> link for the contract you are approving.</p> <div data-bbox="300 1234 1422 1413" style="border: 1px solid black; padding: 5px;"> <p> <input type="text"/> <input type="text"/>                          &lt;&lt; 1-3 of 3 &gt;&gt;   View All                 </p> <table border="1"> <thead> <tr> <th>Transaction Name</th> <th>Status</th> <th>Member</th> <th>Member's Last Name</th> <th>Member's Emplid</th> <th>Member's Deptid</th> <th>Submitted By</th> <th>Approver</th> <th>Submission Date</th> <th>Approve/Deny</th> </tr> </thead> <tbody> <tr> <td>Contract Approval</td> <td>Pending</td> <td>Lisa Simpson</td> <td>Simpson</td> <td>1234567</td> <td>004750</td> <td>Ralph Wiggum</td> <td>Milhouse Van Houten</td> <td>2024/05/14</td> <td style="border: 1px solid red;">Approve/Deny</td> </tr> <tr> <td>Contract Approval</td> <td>Pending</td> <td>Maggie Simpson</td> <td>Simpson</td> <td>1112223</td> <td>002338</td> <td>Rod Flanders</td> <td>Milhouse Van Houten</td> <td>2024/05/09</td> <td>Approve/Deny</td> </tr> <tr> <td>Contract Approval</td> <td>Pending</td> <td>Bart Simpson</td> <td>Simpson</td> <td>1122334</td> <td>044032</td> <td>Rod Flanders</td> <td>Milhouse Van Houten</td> <td>2024/05/09</td> <td>Approve/Deny</td> </tr> </tbody> </table> </div>	Transaction Name	Status	Member	Member's Last Name	Member's Emplid	Member's Deptid	Submitted By	Approver	Submission Date	Approve/Deny	Contract Approval	Pending	Lisa Simpson	Simpson	1234567	004750	Ralph Wiggum	Milhouse Van Houten	2024/05/14	Approve/Deny	Contract Approval	Pending	Maggie Simpson	Simpson	1112223	002338	Rod Flanders	Milhouse Van Houten	2024/05/09	Approve/Deny	Contract Approval	Pending	Bart Simpson	Simpson	1122334	044032	Rod Flanders	Milhouse Van Houten	2024/05/09	Approve/Deny
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# Approving a Contract, Continued

Procedure,  
continued


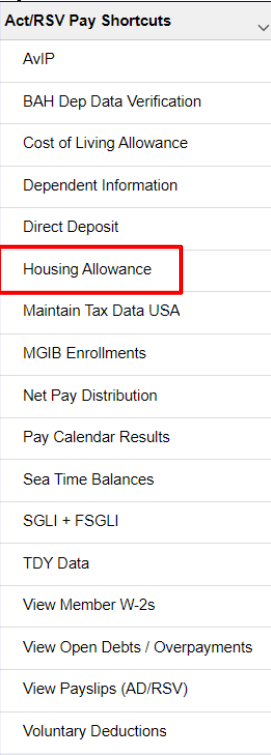
Step	Action																				
5	<p>Enter <b>Comments</b> and click <b>Approve</b> or <b>Deny</b> (deny requires a Comment and returns the contract to the HRS user).</p> <div data-bbox="288 562 1230 1330" style="border: 1px solid blue; padding: 5px;"> <p><b>Action Request</b></p> <p>Contract Approval</p> <p><u>Simpson, Lisa Marie</u></p> <ol style="list-style-type: none"> <li>Please verify the contract data and leave disposition information.</li> <li>If Changes are needed, enter details about changes in the Comments field.</li> <li>Click Approve or Deny button</li> </ol> <p><b>Request Details</b></p> <table border="1" data-bbox="336 748 1222 887"> <tr> <td>Contract Number: 0001</td> <td>Contract Type: ENL</td> </tr> <tr> <td>Contract Status: A</td> <td>Contract Effdt: 05/09/2024</td> </tr> <tr> <td>Contract Begin Dt: 05/09/2024</td> <td></td> </tr> <tr> <td>Expected End Dt: 05/08/2032</td> <td></td> </tr> </table> <p><a href="#">Get Details</a></p> <p><b>Request Information</b></p> <table border="1" data-bbox="336 969 1222 1182"> <tr> <td>Contract Term: 8 Years</td> <td>Mbr Signature Date: 05/09/2024</td> </tr> <tr> <td>Reason: School/Training Requirement</td> <td>SRB Entitlement:</td> </tr> <tr> <td>Num Extensions: 0</td> <td>EXT Tour Length:</td> </tr> <tr> <td>Expect AD TermDt:</td> <td>Expected Loss Date: 05/08/2032</td> </tr> <tr> <td>Leave Balance: 0</td> <td>Cumulative Sold: 0</td> </tr> <tr> <td>Total Leave Sell:</td> <td></td> </tr> </table> <p>Comment: <input style="border: 2px solid red;" type="text"/></p> <p><a href="#">Approve</a> <a href="#">Deny</a></p> </div>	Contract Number: 0001	Contract Type: ENL	Contract Status: A	Contract Effdt: 05/09/2024	Contract Begin Dt: 05/09/2024		Expected End Dt: 05/08/2032		Contract Term: 8 Years	Mbr Signature Date: 05/09/2024	Reason: School/Training Requirement	SRB Entitlement:	Num Extensions: 0	EXT Tour Length:	Expect AD TermDt:	Expected Loss Date: 05/08/2032	Leave Balance: 0	Cumulative Sold: 0	Total Leave Sell:	
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6	<p>The contract is <b>Approved</b>, and the member is fully accessed into the Coast Guard with pay.</p> <div data-bbox="288 1442 1422 1832" style="border: 1px solid blue; padding: 5px;"> <p><b>Contract Approval</b></p> <p>Contract Approval <b>Approved</b> <a href="#">View/Hide Comments</a></p> <p>One Level Approval</p> <div data-bbox="376 1592 842 1704" style="border: 1px solid green; padding: 2px;"> <p><b>Approved</b></p> <p><b>Milhouse Van Houten</b> Contract Approver 05/14/24 - 12:21 PM</p> </div> <p><b>Comments</b></p> <p><b>System at 05/14/24 - 12:17 PM</b></p> </div>																				

# BAH and Direct Deposit

**Introduction** This section provides the procedures for ensuring the member is receiving Basic Allowance for Housing (BAH) and that their direct deposit has been set up to receive pay.

**Information** Once the hire, the contract and the BAH are approved, **then direct deposit must be entered.**

**Procedures** See below.

Step	Action
1	<p>Click on the <b>AD/RSV Payroll Workcenter</b> tile.</p> 
2	<p>Scroll to the Act/RSV Pay Shortcuts section and select the <b>Housing Allowance</b> option.</p> 

*Continued on next page*

## BAH and Direct Deposit, Continued

Procedures,  
continued

Step	Action
3	<p>Enter the <b>Empl ID</b> and click <b>Search</b>. Include History is automatically checked.</p> <div data-bbox="288 521 1190 1458" style="border: 1px solid black; padding: 10px;"> <p><b>Housing Allowance</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p style="text-align: center;"><a href="#">Find an Existing Value</a></p> <p><b>▼ Search Criteria</b></p> <p>Empl ID <input type="text" value="begins with"/> <input style="border: 2px solid red;" type="text" value="1234567"/></p> <p>Empl Record <input type="text" value="="/> <input type="text"/></p> <p>Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Last Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Second Last Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Alternate Character Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Middle Name <input type="text" value="begins with"/> <input type="text"/></p> <p>Business Unit <input type="text" value="begins with"/> <input type="text"/></p> <p>Department Set ID <input type="text" value="begins with"/> <input type="text"/> <input type="button" value="Q"/></p> <p>Department <input type="text" value="begins with"/> <input type="text"/> <input type="button" value="Q"/></p> <p><input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p> <p><input style="border: 2px solid red;" type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">Basic Search</a> <input type="button" value="Save Search Criteria"/></p> </div>

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# BAH and Direct Deposit, Continued

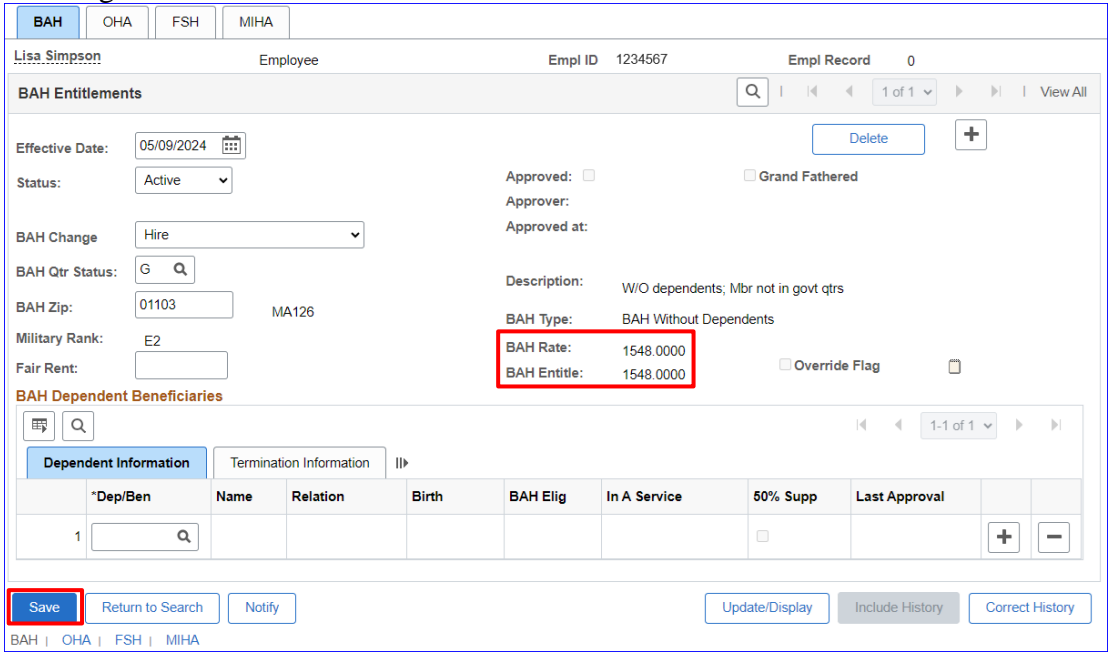
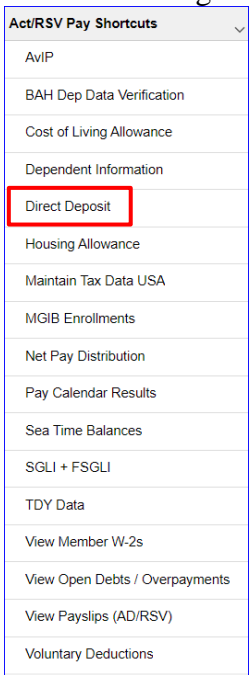
**Procedures,**  
continued

Step	Action																																																																																															
4	<p>Follow the <a href="#">Basic Allowance for Housing (BAH)</a> guide for starting BAH, keeping the following in mind:</p> <ul style="list-style-type: none"> <li>• For married members, ensure <b>dependents</b> are entered in DA prior to starting a BAH row.</li> <li>• BAH With cannot be entered without eligible dependents.</li> <li>• Pay special attention to a recruit that is <b>married member to member</b>, to ensure that BAH With is only being paid as authorized.</li> <li>• For recruits authorized BAH With, utilize the zip code on the dependency worksheet, vice the recruit’s contract.</li> <li>• Recruits are authorized BAH, not OHA.</li> <li>• If dependents live somewhere that <b>BAH does not exist</b>, recruits will receive Unit BAH With.</li> <li>• Check zip codes for CONUS/OCONUS COLA where applicable.</li> <li>• Married reservists are entitled to BAH With.</li> <li>• Single reservists will be authorized BAH Without Depn <b>ONLY if they have a lease agreement</b> in their recruit packet.</li> </ul>																																																																																															
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# BAH and Direct Deposit, Continued

Procedures,  
continued

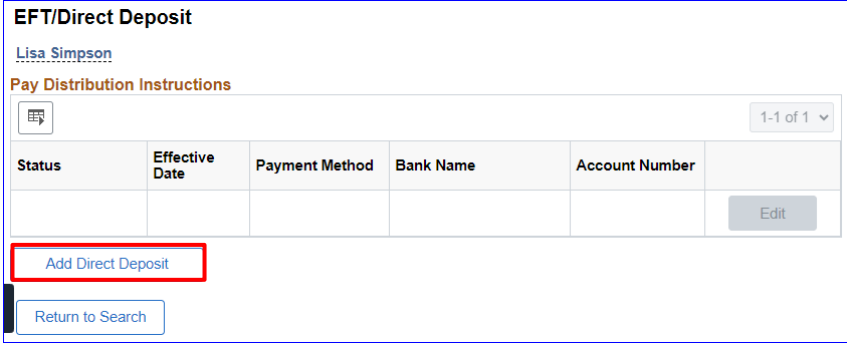
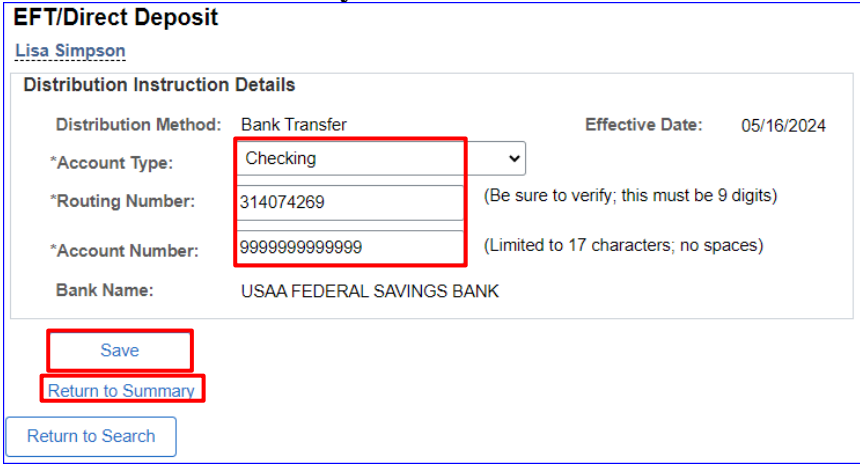
Step	Action
<p><b>5</b></p>	<p>Clicking <b>Save</b> will fill in the <b>BAH Rate</b> and <b>BAH Entitle</b> fields.</p>  <p>The screenshot shows the 'BAH Entitlements' form for Lisa Simpson (Employee ID 1234567). The form includes fields for Effective Date (05/09/2024), Status (Active), BAH Change (Hire), BAH Qtr Status (G), BAH Zip (01103), Military Rank (E2), and Fair Rent. The BAH Type is 'BAH Without Dependents'. The BAH Rate and BAH Entitle fields are both set to 1548.0000 and are highlighted with a red box. The 'Save' button at the bottom left is also highlighted with a red box. Other buttons include 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.</p>
<p><b>6</b></p>	<p>Without leaving the screen, select the <b>Direct Deposit</b> option.</p>  <p>The screenshot shows the 'Act/RSV Pay Shortcuts' dropdown menu. The options listed are: AvIP, BAH Dep Data Verification, Cost of Living Allowance, Dependent Information, Direct Deposit (highlighted with a red box), Housing Allowance, Maintain Tax Data USA, MGIB Enrollments, Net Pay Distribution, Pay Calendar Results, Sea Time Balances, SGLI + FSGLI, TDY Data, View Member W-2s, View Open Debts / Overpayments, View Payslips (AD/RSV), and Voluntary Deductions.</p>

*Continued on next page*



# BAH and Direct Deposit, Continued

Procedures,  
continued

Step	Action
7	<p><b>Click Add Direct Deposit.</b></p> 
8	<p><b>Enter the following:</b></p> <ul style="list-style-type: none"> <li>• <b>Account Type</b> – Select from the drop-down.</li> <li>• <b>Routing Number</b> – Enter the appropriate data.</li> <li>• <b>Account Number</b> – Enter the appropriate data.</li> </ul> <p><b>Click Save.</b> <b>Click Return to Summary.</b></p> 
9	<p><b>The Pay Distributions Instructions will display with the new data.</b></p> 