

Direct Access User Roles and Functions

Overview

Introduction This guide provides the procedures for **requesting, removing, and withdrawing** User Roles and Functions in Direct Access (DA). For procedures to **recertify** Roles, see the **Recertifying DA User Roles and Functions** user guide.

Direct Access Functional User Roles DA Functional User Roles are position based. It is important to **review the requirements** of each User Role and Function to ensure all criteria is met, such as appropriate Approval Authority and/or a Designation Letter uploaded with the request. For a list of DA Functional User Roles and the requirements associated with each role, refer to PPC’s website at: <https://www.dcms.uscg.mil/ppc/da/functionalroles/>.

The below User Roles require a **Designation Letter** that must be uploaded within the User Role request:

- CG Educational Services Officer
 - CG Passport Acceptance Agent
 - CG Recruiter in Charge (see “Recruiter in Charge” on next page)
 - CG Training Officer
 - CG Urinalysis Coordinator
-

Pending Requests

- 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.**
- Once the Approver approves the request, it will be sent to PPC for final approval.
- **Allow 24 hours after PPC approval to see any requested changes to Roles.**

Termination of Roles If a Command requires termination of User Roles prior to transfer or separation, notify PPC Customer Care. Include the member’s Employee ID number and the User Role(s) and Function(s) to be revoked.

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Recruiter In Charge For those requesting the **CG Recruiter In Charge** role and the member's position data in DA does **NOT** indicate Recruiter In Charge, a Designation Memo is required and **MUST** be submitted to PPC Customer Care prior to submitting a User Roles Request (see the [Understanding Job Data](#) user guide for reviewing a member's position data in DA).

Mobilization Roles **CG Mobilization Administration:** Provides access to Mobilization setup tables, components, reports, and the ability to approve and cancel Mobilization requirements. This role is intended only for DOL, AREA, PSC, and District personnel in charge of surge staffing and is approved on a case-by-case basis. This role **requires** the User Roles Request to be sent separately to PSC, with justification listed.

CG Mobilization Approver: Provides access to Mobilization components, reports, and the ability to approve and cancel Mobilization requirements.

CG Mobilization Processor: Provides access to Mobilization components, reports, and the ability to approve Mobilization requirements.

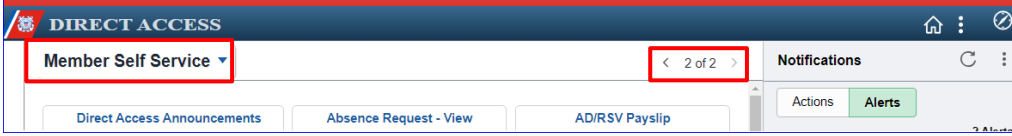
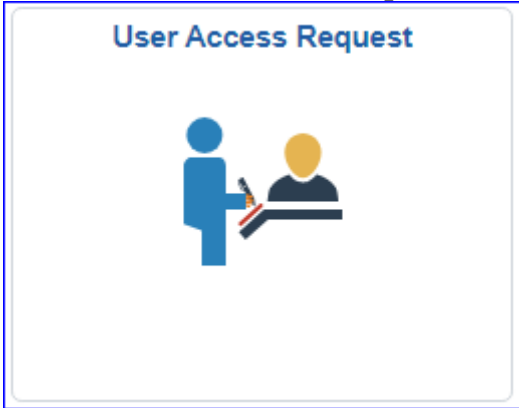
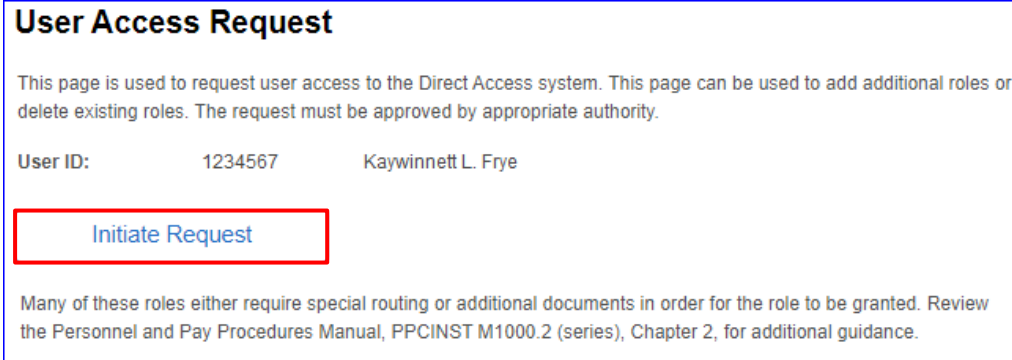
CG Mobilization Resume Endorser: Provides access to endorse Mobilization resumes.

CG Mobilization View Only: Provides view only access to the Mobilization components.

Member: Requesting New User Roles

Introduction This section provides the procedures for requesting new User Roles and Functions in DA.

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> 
3	<p>The User Access Request page will display. Click Initiate Request.</p> 

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Member: Requesting New User Roles, Continued

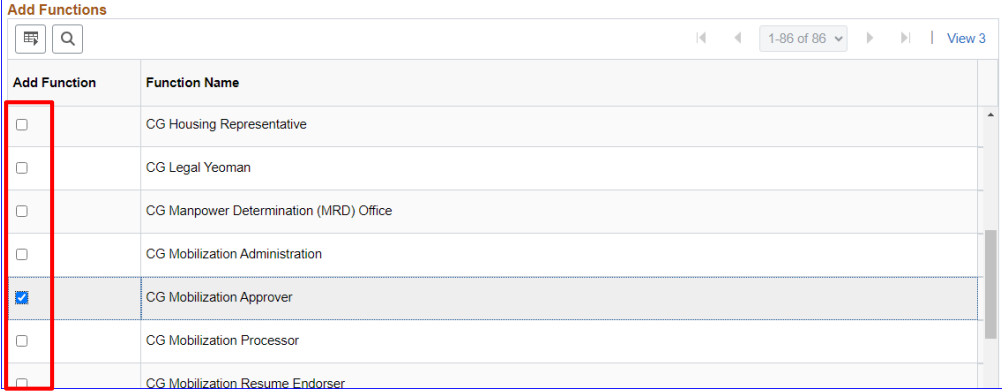
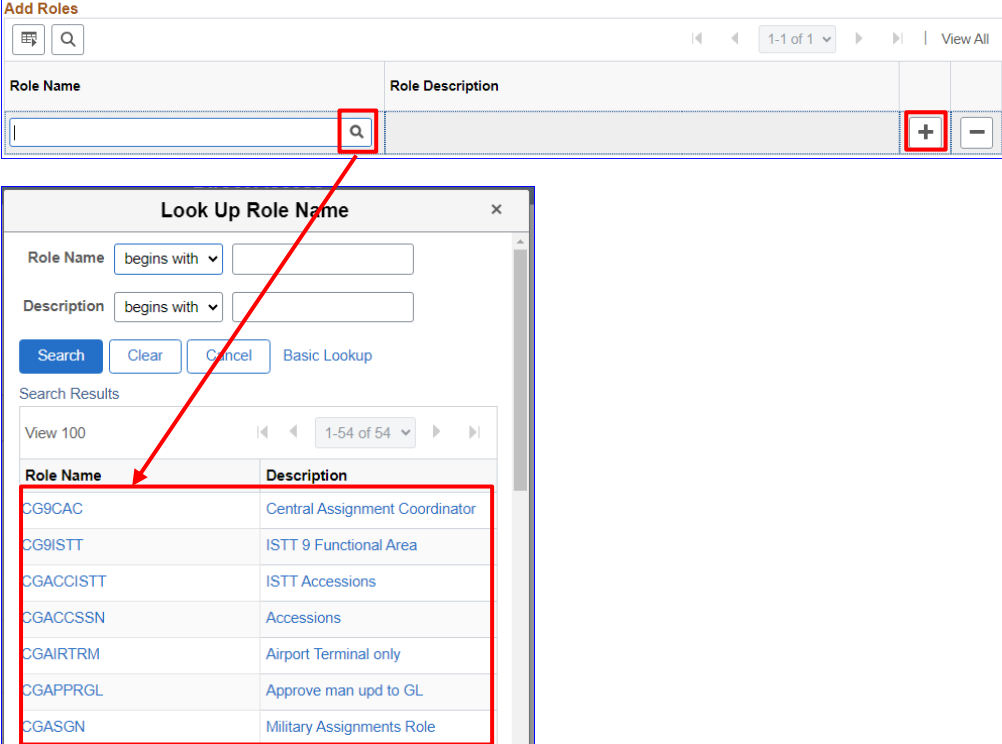
Procedures,
continued

Step	Action																												
<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 User Roles are reset to Self Service only.</p> <div data-bbox="354 618 1362 1189" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1234567 Kaywinnett L. Frye Rank: YNCM Request ID: Request Status:</p> <p>Current Roles</p> <table border="1" data-bbox="354 819 1362 1003"> <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>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>CGHRSUP</td> <td>HRS Supervisor</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> </tbody> </table> <p>Current Functions</p> <table border="1" data-bbox="354 1088 1362 1173"> <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 SPO Auditor</td> <td>CG SPO Auditor</td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRS	Coast Guard HRS/PERSRU	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRSUP	HRS Supervisor	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGROWSEC_CGAD	CG Active Duty Row Security	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG SPO Auditor	CG SPO Auditor
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<p>5</p>	<p>Under the Add Functions section, click View All.</p> <div data-bbox="354 1263 1362 1525" style="border: 1px solid black; padding: 5px;"> <p>Add Functions</p> <table border="1" data-bbox="354 1335 1362 1518"> <thead> <tr> <th>Add Function</th> <th>Function Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)</td> </tr> <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> </tbody> </table> </div>	Add Function	Function Name	<input type="checkbox"/>	CG Admin (PSI Enhanced) (YN2-PERS w/"By Dir" Only)	<input type="checkbox"/>	CG Admin (PSI Enhanced) (YN3-YN2 Only)	<input type="checkbox"/>	CG Admin (YN-PERS Only)																				
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Member: Requesting New User Roles, Continued


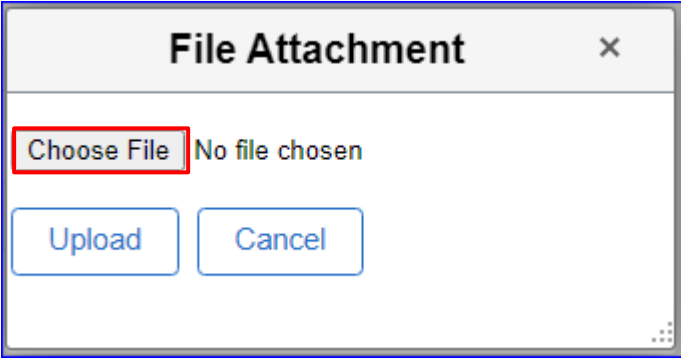
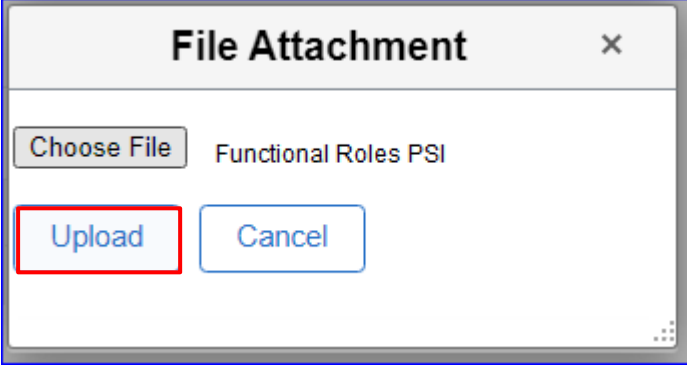
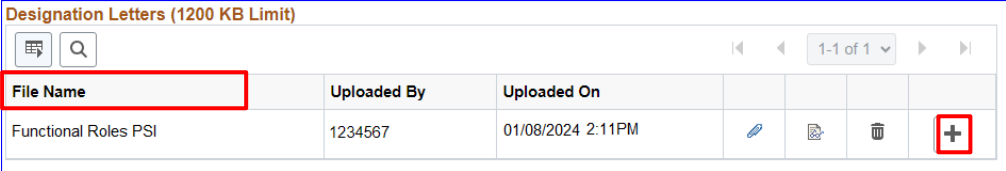
Procedures,
continued

Step	Action																
6	<p>Scroll through and select the Functions the position requires.</p> <p>NOTE: It is important to review the requirements of each User Role and Function to ensure all criteria are met, such as appropriate Approval Authority and/or a Designation Memo provided to PPC. See the DA Functional Roles webpage for a list of requirements.</p>  <p>Add Functions</p> <table border="1"> <thead> <tr> <th>Add Function</th> <th>Function Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>CG Housing Representative</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Legal Yeoman</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Manpower Determination (MRD) Office</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Mobilization Administration</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>CG Mobilization Approver</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Mobilization Processor</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Mobilization Resume Endorser</td> </tr> </tbody> </table>	Add Function	Function Name	<input type="checkbox"/>	CG Housing Representative	<input type="checkbox"/>	CG Legal Yeoman	<input type="checkbox"/>	CG Manpower Determination (MRD) Office	<input type="checkbox"/>	CG Mobilization Administration	<input checked="" type="checkbox"/>	CG Mobilization Approver	<input type="checkbox"/>	CG Mobilization Processor	<input type="checkbox"/>	CG Mobilization Resume Endorser
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7	<p>If a specific User Role or Function is not listed: under Add Roles, use the Lookup to locate the Role Name, then select the appropriate role.</p> <p>Click the Plus button to add additional Roles as appropriate.</p>  <p>Add Roles</p> <p>Role Name: <input type="text"/> <input type="button" value="🔍"/> <input type="button" value="+"/> <input type="button" value="-"/></p> <p>Look Up Role Name</p> <p>Role Name: <input type="text"/> begins with <input type="text"/></p> <p>Description: <input type="text"/> begins with <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> Basic Lookup</p> <p>Search Results</p> <p>View 100 <input type="button" value="1-54 of 54"/> <input type="button" value="View All"/></p> <table border="1"> <thead> <tr> <th>Role Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>CG9CAC</td> <td>Central Assignment Coordinator</td> </tr> <tr> <td>CG9ISTT</td> <td>ISTT 9 Functional Area</td> </tr> <tr> <td>CGACCISTT</td> <td>ISTT Accessions</td> </tr> <tr> <td>CGACCSSN</td> <td>Accessions</td> </tr> <tr> <td>CGAIRTRM</td> <td>Airport Terminal only</td> </tr> <tr> <td>CGAPPRGL</td> <td>Approve man up to GL</td> </tr> <tr> <td>CGASGN</td> <td>Military Assignments Role</td> </tr> </tbody> </table>	Role Name	Description	CG9CAC	Central Assignment Coordinator	CG9ISTT	ISTT 9 Functional Area	CGACCISTT	ISTT Accessions	CGACCSSN	Accessions	CGAIRTRM	Airport Terminal only	CGAPPRGL	Approve man up to GL	CGASGN	Military Assignments Role
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Member: Requesting New User Roles, Continued

Procedures,
continued

Step	Action
8	<p>If a role requires a Designation Letter, you must add it to the request, otherwise you will get an error. Click the Add Attachment icon.</p> 
9	<p>Click Choose File.</p> <p>NOTE: The document cannot be in Excel and it cannot exceed 400 KB.</p> 
10	<p>Navigate to the appropriate document/file and select it. Click Upload.</p> 
11	<p>The uploaded File Name will display. If more Designation Letters are required, click the Plus button, and repeat Steps 8-10, otherwise continue to Step 12.</p> 

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Member: Requesting New User Roles, Continued

Procedures,
continued

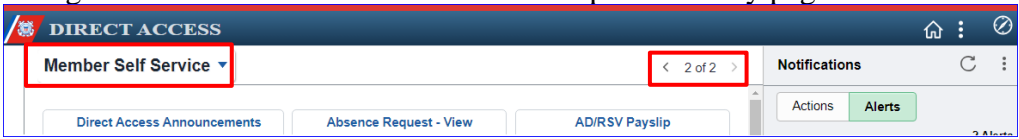
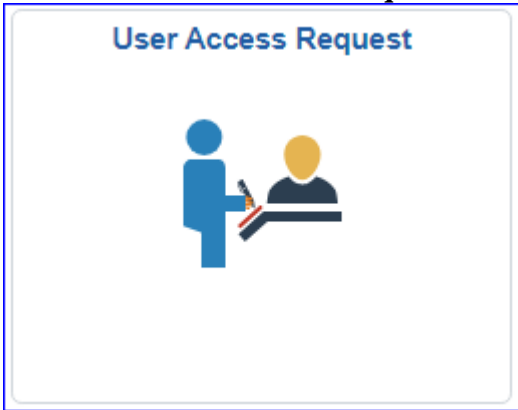
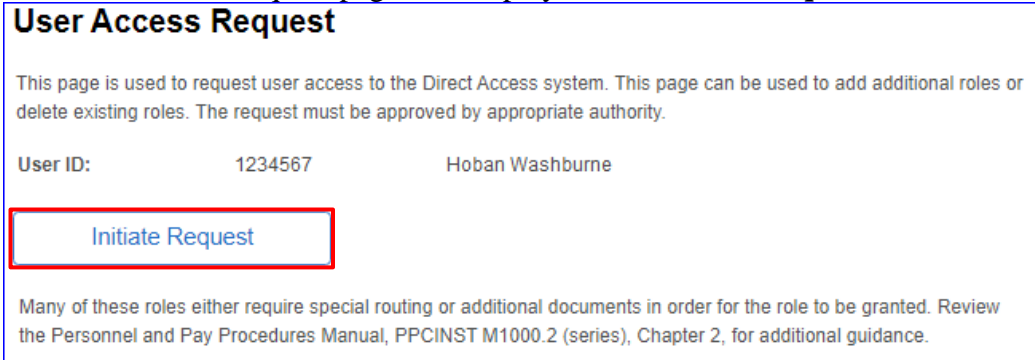
Step	Action
<p>12</p>	<p>In the Approver Section, enter the Justification for requesting the User Role(s)/Function(s) (required). Enter or use the Lookup to locate the Approver ID (approver's Employee ID number).</p> <p>Review the statement and check the Acknowledgement box. Click Submit for Approval.</p> <div data-bbox="357 640 1366 936" style="border: 1px solid black; padding: 5px;"> <p>Approver Selection</p> <p>*Justification: <input type="text" value="Enter a justification for the DA User Role request"/></p> <p>*Approver ID: <input type="text" value="9876543"/> <input type="button" value="Q"/> Malcolm Reynolds Position: 00051974 - ADMIN/PERS SUPPORT Rank: YNC</p> <p><input checked="" type="checkbox"/> Acknowledgement: 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.)</p> <p><input type="button" value="Submit for Approval"/></p> </div>

Member: Removing User Roles

Introduction This section provides the procedures for removing User Roles and Functions in DA.

Termination of Roles If a Command requires termination of User Roles prior to transfer or separation, notify PPC Customer Care. Include the member’s Employee ID number and the User Role(s) and Function(s) to be revoked.

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> 
3	<p>The User Access Request page will display. Click Initiate Request.</p> 

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Member: Removing User Roles, Continued

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continued

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5	<p>Check the Remove Role box for each Role and/or Function to be removed. DO NOT REMOVE THE CGROWSEC_CGAD ROLE.</p> <div data-bbox="331 1223 1369 1928" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1234567 Hoban Washburne Rank: LTJG</p> <p>Request ID: Request Status:</p> <p>▼ Current Roles</p> <p>⌵ 🔍 1-6 of 6 View 3</p> <table border="1"> <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>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>CGEMPREV</td> <td>Employee Review (Standalone)</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> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>CGTRNTQC</td> <td>TQC Scheduler</td> <td>Role Details</td> </tr> </tbody> </table> <p>▼ Current Functions</p> <p>⌵ 🔍 1-1 of 1 View All</p> <table border="1"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>CG Enlisted Evaluation Manager</td> <td>CG Enlisted Evaluation Manager</td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGDSCPWW	Disciplinary Actions View Only	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGEMPREV	Employee Review (Standalone)	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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CGTRNTQC	TQC Scheduler	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CG Enlisted Evaluation Manager	CG Enlisted Evaluation Manager
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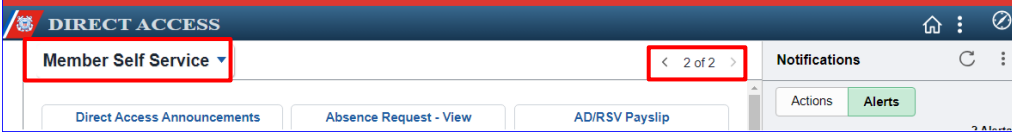
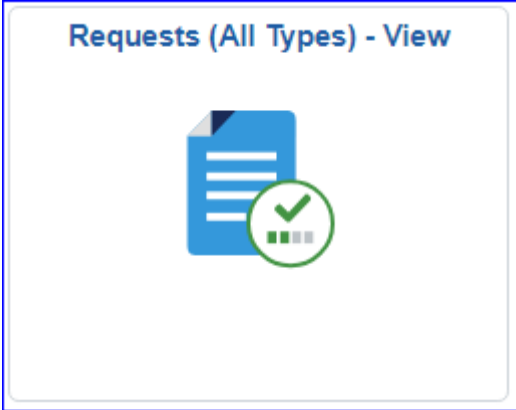
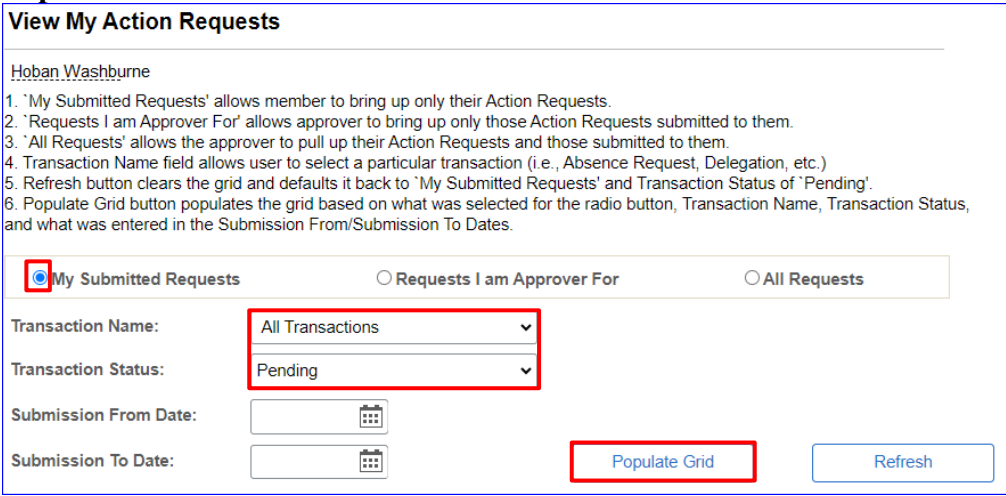
Procedures,
continued

Step	Action
<p>6</p>	<p>Scroll to the bottom of the page and enter the Justification for removing the User Role/Function (required). Enter the Approver ID 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> <div data-bbox="331 656 1369 949" style="border: 1px solid black; padding: 5px;"> <p>Approver Selection</p> <p>*Justification: <input type="text" value="Enter an explanation for the removal request (required)."/></p> <p>*Approver ID: <input type="text" value="9876543"/> <input type="button" value="Q"/> Malcolm Reynolds Position: 00012800 - SPO DIV SUPERVISOR Rank: YNCM</p> <p><input checked="" type="checkbox"/> Acknowledgement: 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.)</p> <p><input type="button" value="Submit for Approval"/></p> </div>
<p>7</p>	<p>Once submitted, the request will be placed in a Pending status and email notification will be sent to the Approver.</p> <div data-bbox="331 1064 1369 1487" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"><input type="button" value="Submit for Approval"/></p> <p>User Access Request</p> <p>Request Status: Pending</p> <p>1</p> <div style="display: flex; align-items: center; gap: 20px;"> <div style="border: 1px solid gray; padding: 5px; width: 45%;"> <p>Pending</p> <p>Malcolm Reynolds</p> <p><input type="button" value="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</p> <p><input type="button" value="User Access Request Final Appr"/></p> </div> </div> </div>

Member: Withdrawing a User Roles Request

Introduction This section provides the procedures for withdrawing a User Roles Request in DA in the event the Approver becomes unavailable (transferred, separated, TDY, etc.).


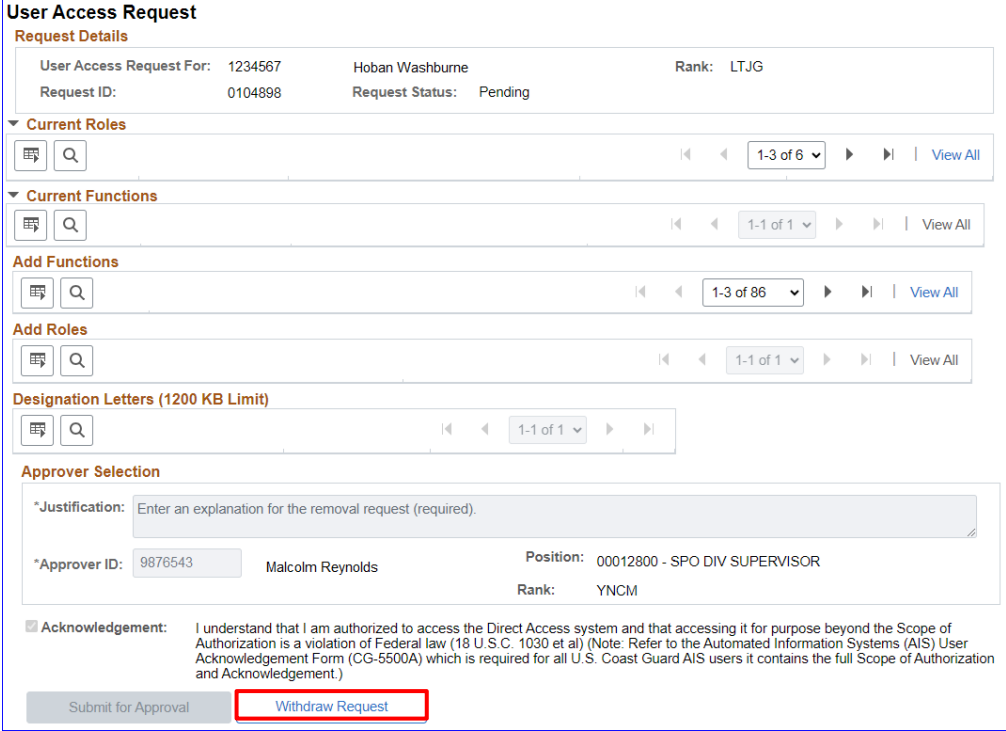
Procedures See below.

Step	Action
1	<p>Navigate to Member Self Service via the drop-down or by page arrows.</p> 
2	<p>Click on the Requests (All Types) - View tile.</p> 
3	<p>The View My Action Requests page will display. Ensure the My Submitted Requests button is selected. The Transaction Name will default to All Transactions and the Transaction Status will default to Pending. Click Populate Grid.</p>  <p>View My Action Requests</p> <p>Hoban Washburne</p> <ol style="list-style-type: none"> 'My Submitted Requests' allows member to bring up only their Action Requests. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.) Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'. 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> <input checked="" type="radio"/> My Submitted Requests <input type="radio"/> Requests I am Approver For <input type="radio"/> All Requests </p> <p>Transaction Name: All Transactions</p> <p>Transaction Status: Pending</p> <p>Submission From Date: <input type="text"/></p> <p>Submission To Date: <input type="text"/></p> <p>Populate Grid Refresh</p>

Continued on next page

Member: Withdrawing a User Roles Request, Continued

Procedures,
continued

Step	Action
4	<p>All pending requests will be listed. It may be necessary to click View All to see all pending requests. Scroll through the list and locate the User Access Request. Click View Details.</p> 
5	<p>The User Access Request will open in a new tab. Click Withdraw Request.</p> 
6	<p>The Request Status will update from Pending to Terminated. 'X' out of the tab to return to the View My Requests (all types) tab.</p> <p>A new User Access Request will need to be submitted.</p> 