

# **PHS Manage HR Date User Guide**



Version 1.0

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2703 Martin Luther King Jr. Ave SE  
Washington, DC 20593

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## PERSONAL AND JOB DATA

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**Introduction** There are two main tables that make up an officer's core HR data record. These two tables must be populated for every officer in Direct Access.

### Personal Data:

- Describes an officer's personal information
- Some Personal Information has an effective date – name, address, marital status
- Some personal information is not expected to change – Birth Date, Ethnicity, SSN
- Personal Data information (with the exception of name) is closely controlled because it is Privacy Act related.
- Each officer has only one Personal Data record.
- Changes can be made to a member's Personal Data record and does not have to be approved.

### Job Data

- Job Data contains current and historical record of an officer's assignment related information based on effective date.
- Job Data is not privacy act related, and the information contained in Job is shared fairly widely.
- Job Data includes an officer's status (Active, Retired, or Terminated).
- Job Data includes an officer's current position, department and location, temp grade and perm grade.
- Job Data includes an officer's current Salary Grade and Compensation.
- An officer can have multiple job data records. This is tracked by the Empl Record field. For example, a PHS officer detailed to the Coast Guard will have 2 job data records (empl records): 1) the PHS job record, empl record 0, and 2) the Detailed to CG empl record, empl record 1.
- Changes can only be made to Hire and Rehire rows. Any changes to these rows will have to be submitted for approval. Only PPC can modify non-hire/rehire rows.

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<b>Menu Path(s)</b>	Menu Navigation: Workforce Administration > Personal Information > Modify a Person  Workforce Administration > Job Information > Job Data
Portal Pagelet:	Core HR

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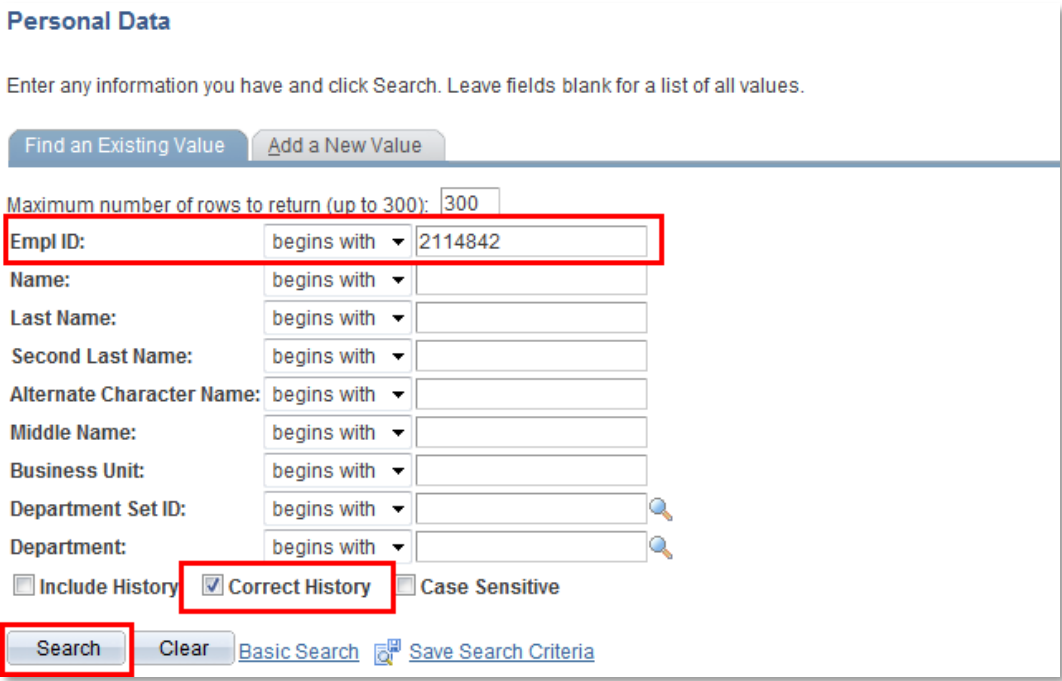
**Need Help?**

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

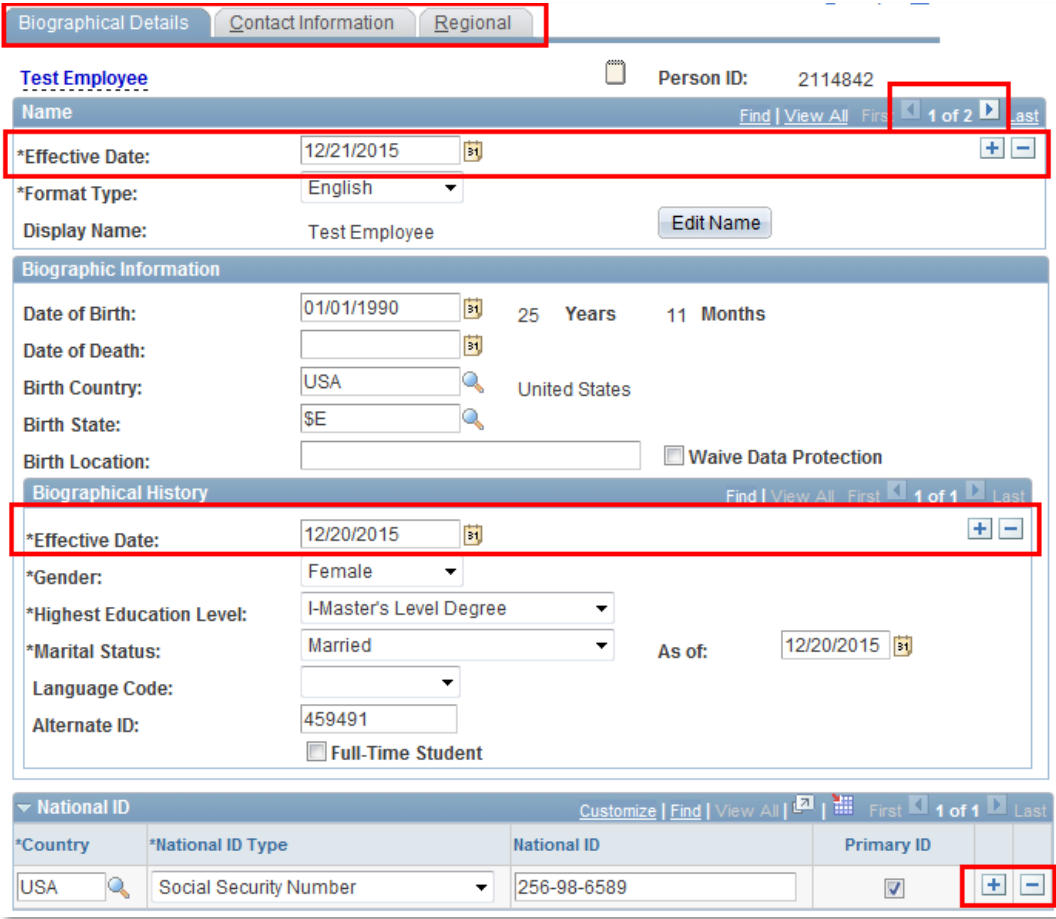
- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
  - Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
  - Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)
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**Procedure**

The following steps will show you how view/update personal and view job data.



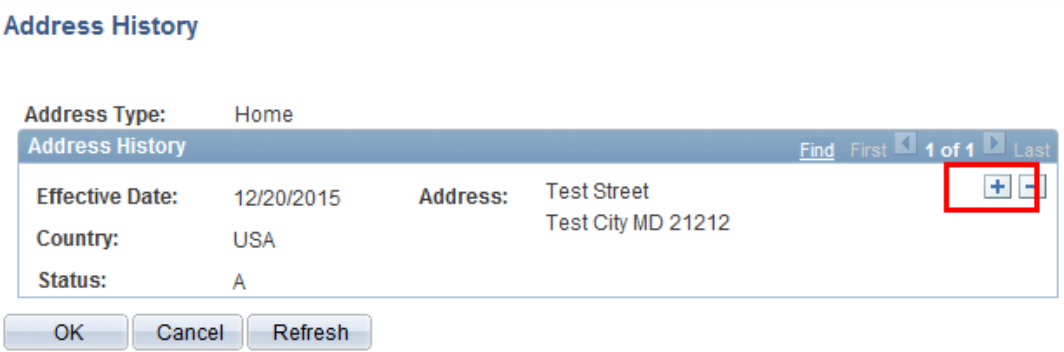
Step	Action
<b>VIEW/UPDATE PERSONAL DATA</b>	
1	<p>Click on the <b>Personal Data</b> link in the Core HR portal pagelet.</p> <p><b>Enterprise Menu</b> navigation: Workforce Administration &gt; Personal Information &gt; Modify a Person</p> 
2	<p>On the Find an Existing Value search page, enter the member's employee ID in the <b>EmplID</b> field,</p> <p>Click the <b>Correct History</b> checkbox if you are correcting existing data. If you are adding new data, the correct history checkbox does not need to be selected. You can also enter correction mode by clicking the Correct History button on the Personal Data pages.</p> <p>Click <b>Search</b>.</p> 
3	<p>The Personal Data component consists of three pages (tabs): Biographical Details, Contact Information, and Regional. Click on the tab to make the appropriate personal</p>

Step	Action
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	<p>data updates.</p> <p>Certain sections of Personal Data allow you to retain history. These are sections that have an 'Effective Date' and have the '+/-' icon (e.g. Names, Biographical History, Current Addresses, etc.). You can retain history data by inserting a new row. To insert a new row, click the '+' icon. When you insert a row, the row counter will increase accordingly. Or, you can choose to overwrite existing data. To overwrite existing data for an effective dated row, you must be in Correction mode (see Step 2 for correction mode)</p> <p>If the section has the '+/-' icon but no effective date or does not have the '+/-' icons, these sections do not retain history (National ID, Phone Numbers, Ethnic Group) and the data can be overwritten. You do not have to be in correction mode for these updates.</p> 
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4	<p>To add <b>Name</b>, click the '+' icon in the Name section (to retain the old name) and then click the Edit Name button. To correct the existing name, click the Edit Name button without inserting a row (you must be in correction mode to do this). Add/correct the name on the Edit Name page and then click the OK button.</p>
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Step	Action
	<div data-bbox="293 283 1344 846"> <p><b>Edit Name</b></p> <p>English Name Format</p> <p>Prefix: <input type="text"/></p> <p>First Name: <input type="text" value="Test"/></p> <p>Middle Name: <input type="text"/></p> <p>Last Name: <input type="text" value="Employee"/></p> <p>Suffix: <input type="text"/></p> <p>Display Name: Test Employee</p> <p>Formal Name: Test Employee</p> <p>Name: Employee,Test</p> <p><input type="button" value="Refresh Name"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/></p> </div>
5	<p>To update <b>Biographic Information</b>, overwrite the existing data. This section is not effective dated and will not retain history. You do not have to be in correction mode to update this data.</p> <div data-bbox="293 1045 1344 1266"> <p><b>Biographic Information</b></p> <p>Date of Birth: <input type="text" value="01/01/1990"/> <input type="button" value="31"/> 25 Years 11 Months</p> <p>Date of Death: <input type="text"/> <input type="button" value="31"/></p> <p>Birth Country: <input type="text" value="USA"/> <input type="button" value="Search"/> United States</p> <p>Birth State: <input type="text" value="\$E"/> <input type="button" value="Search"/></p> <p>Birth Location: <input type="text"/> <input type="checkbox"/> Waive Data Protection</p> </div>
6	<p>To add/update <b>Biographical History</b>, click the '+' icon in the Biographical History section (to retain the old data) and then update the data. To correct the existing data, enter the new data without inserting a row. You must be in Correction mode to correct existing data.</p> <div data-bbox="293 1497 1344 1812"> <p><b>Biographical History</b> Find   View All First 1 of 2 Last</p> <p>*Effective Date: <input type="text" value="12/21/2015"/> <input type="button" value="31"/> <input type="button" value="+"/> <input type="button" value="-"/></p> <p>*Gender: <input type="text" value="Female"/></p> <p>*Highest Education Level: <input type="text" value="I-Master's Level Degree"/></p> <p>*Marital Status: <input type="text" value="Married"/> As of: <input type="text" value="12/20/2015"/> <input type="button" value="31"/></p> <p>Language Code: <input type="text"/></p> <p>Alternate ID: <input type="text" value="459491"/> <input type="checkbox"/> Full-Time Student</p> </div>

Step	Action
	<p><b>Note:</b> Any officer hired after 1/4/16, the Alternate ID field will display their applicant ID.</p>
7	<p>To update SSN, update the data directly. Only insert a row if you are adding a new National ID for a different country.</p> 
8	Click the <b>Contact Information</b> tab.
9	<p>In the <b>Current Addresses</b> section, to <b>add a new address</b> for an existing address type, click the <b>View Address Details</b> link.</p>  <p>Insert a new row on the <b>Address History</b> page.</p>  <p>On the Address History page, changed the Effective Date (if necessary) and click the <b>Add Address</b> link.</p>



Step	Action
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### Address History

Address Type: Home

Address History Find First 1-2 of 2 Last

\*Effective Date: 12/21/2015

Address: Test Street  
Test City MD 21212

Country: USA

\*Status: A

[Add Address](#)

Effective Date: 12/20/2015

Address: Test Street  
Test City MD 21212

Country: USA

Status: A

OK

Cancel

Refresh

On the **Edit Address** page, add the address and click the OK buttons on each of the pages until you return to the Contact Information page.

### Edit Address

Country: United States

Address 1: Test Street

Address 2:

Address 3:

City: Test City State: MD Maryland

Postal: 21212

County:

OK

Cancel

To **correct an existing address**, click the **Edit/View Address Detail** link. You must be in correction mode.

## Step Action

Current Addresses					Customize   Find   View All      First 1-3 of 3 Last	
Address Type	As Of Date	Status	Address			
Home	12/20/2015	A	Test Street Test City MD 21212	<a href="#">Edit/View Address Detail</a>	<a href="#">+</a>	<a href="#">-</a>
Mailing	12/01/2014	A	Test Street Test City MD 21212	<a href="#">Edit/View Address Detail</a>	<a href="#">+</a>	<a href="#">-</a>
Business	12/01/2014	A	123 Test Street Test City DC 10101	<a href="#">Edit/View Address Detail</a>	<a href="#">+</a>	<a href="#">-</a>

Then, click the **Update/View Address** link on the **Address History** page.

**Address History**

Address Type: Home

Address History Find First 1-2 of 2 Last

\*Effective Date: 12/20/2015 Address: 123 Test Street [+](#) [-](#)  
 Test City MD 24211

Country: USA

\*Status: A

[Update/View Address](#)


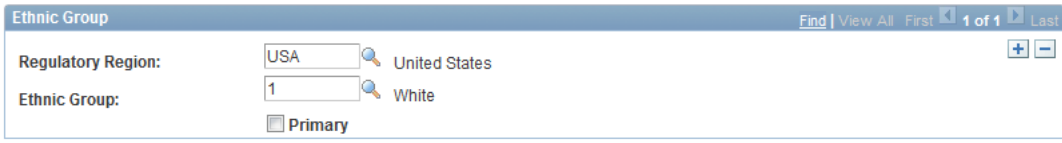

To **add a new address type**, click the '+' icon to insert a row. In the new row, select an **Address Type** from the drop down list and click the **Add Address Detail** link.

Current Addresses					Customize   Find   View All      First 1-4 of 4 Last	
Address Type	As Of Date	Status	Address			
Home	12/20/2015	A	Test Street Test City MD 21212	<a href="#">Edit/View Address Detail</a>	<a href="#">+</a>	<a href="#">-</a>
Mailing	12/01/2014	A	Test Street Test City MD 21212	<a href="#">Edit/View Address Detail</a>	<a href="#">+</a>	<a href="#">-</a>
Business	12/01/2014	A	123 Test Street Test City DC 10101	<a href="#">Edit/View Address Detail</a>	<a href="#">+</a>	<a href="#">-</a>
				<a href="#">Add Address Detail</a>	<a href="#">+</a>	<a href="#">-</a>

**10**

To add/update **Phone Information**, update the phone for the appropriate phone type. Existing phone numbers can be updated without being in correction mode. Additional phones types can be added by clicking the '+' icon.

**Email Addresses** cannot be updated here. Use the Email Address transaction in the HR Data Shortcuts pagelet to update/add member email addresses. Email addresses can also be added/updated via employee self-service.

Step	Action
	
11	<p>Click the <b>Regional</b> tab.</p> <p>To correct <b>Ethnic Group</b>, update the existing ethnic group. Existing ethnicity data can be updated without being in correction mode. Additional ethnicity can be added by clicking the '+' icon.</p>  <p>To designate an ethnicity as Primary, select the Primary checkbox for the row. This is optional.</p>
12	<p>The <b>History</b> section is not used by any downstream processes. You can indicate data in this section but it will be for informational purposes only.</p>
<b>VIEW JOB DATA</b>	
1	<p>Click on the <b>Job Data</b> link in the <b>Core HR</b> pagelet.</p> <p><b>Enterprise Menu</b> navigation: Workforce Administration &gt; Job Information &gt; Job Data</p> 
2	<p>On the search page, enter the member's employee ID in the <b>EmplID</b> field and click <b>Search</b>.</p>

Step	Action
	<div> <p><b>Job Data</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value</p> <p>Maximum number of rows to return (up to 300): <input type="text" value="300"/></p> <p>Empl ID: <input type="text" value="begins with"/> <input type="text" value="2114842"/></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"/></p> <p>Department: <input type="text" value="begins with"/> <input type="text"/></p> <p><input 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"/> <a href="#">Basic Search</a> <a href="#">Save Search Criteria</a></p> </div>
3	<p>Refer to the PHS Accessions – Hire and/or Rehire user guides for Job Data settings.</p> <p>You can only make changes to job data for the Hire and Rehire rows, and only if these rows are top-of-stack. If you need to make updates to these rows when they are not top-of-stack or any other rows, you must contact PPC. Although you can enter the job data pages in Correction mode and the fields are edittable, you will receive an error message upon save if the row you are making changes to is not a top-of-stack hire/rehire row.</p>

## PERSON PROFILE DATA

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**Introduction** This section provides procedures for updating/adding Person Profile data.

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**Menu Path(s)** Menu Navigation: Workforce Development > Profile Management > Profiles > Person Profiles  
Portal Pagelet: Core HR > Person Profiles


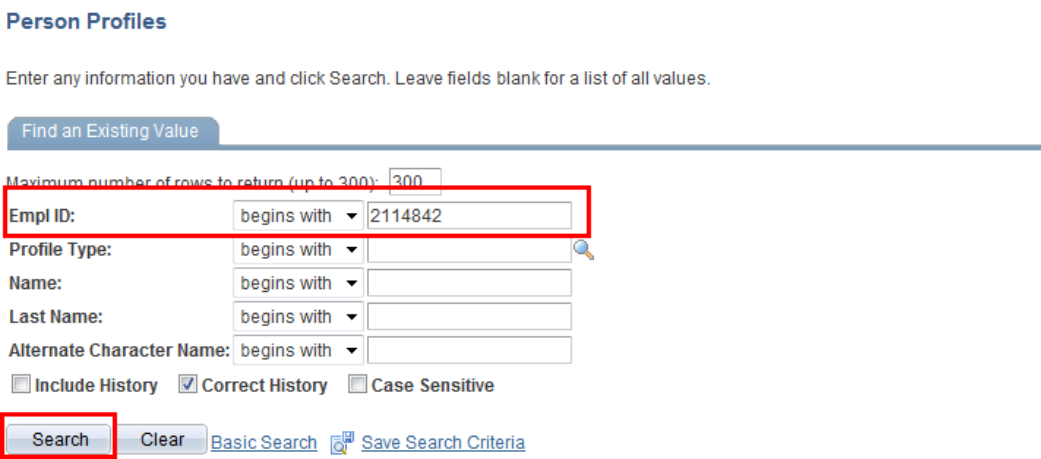
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**Need Help?** If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
- Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
- Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)

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**Procedure** The following steps will show you how to maintain Person Profile data.

Step	Action
1	<p>Click on the <b>Person Profile</b> link in the Core HR or Person Profile portal pagelet.</p> <p><b>Enterprise Menu</b> navigation: Workforce Administration &gt; Personal Information &gt; Modify a Person</p> 
2	<p>Enter the Employee ID in the <b>EmplID</b> field and click <b>Search</b>. The 'Correct History' checkbox will be automatically selected. This can be left checked on.</p> 
3	<p>In the Search Results, select the '<b>Person</b>' row.</p>

Step

Action

Person Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300):

300

Empl ID:

begins with

2114842

Profile Type:

begins with

Name:

begins with

Last Name:

begins with

Alternate Character Name:

begins with

☐ Include History

☒ Correct History

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All

First

1-2 of 2

Last

Empl ID

Profile Type

Name

Last Name

Alternate Character Name

2114842

PERSON

Test Employee

EMPLOYEE

(blank)

2114842

AWARDS COORD

Test Employee

EMPLOYEE

(blank)

4

On the Person Profile page, click on the tab that contains the content section you wish to update.

Person Profile

Empl ID:

2114842

Test Employee

Profile Type:

PERSON

Person

\*Profile Status:

Active

\*Description:

Test Employee

i

print

Profile Actions:

<Select Action>

»

Competencies

Qualifications

Education

Mobility

Waivers

CAN

▼ Honors and Awards

Customize | Find | View All | 

First

1 of 1

Last

ID

Honor and Award

Content Type

CG70

PHS Meritorious Service Medal

HON

trash

+ Add New Honors and Awards

▼ Language Skills

There are currently no Language Skills for this profile. Please add one if required.

5

To add a new content item to the content section (e.g. Honors and Awards), click the ‘Add New...’ link. Add the data on the Add page, click the OK button, and then click the Save button on the Person Profile page.

Step	Action
------	--------

▼ Honors and Awards [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

ID	Honor and Award	Content Type
CG70	<a href="#">PHS Meritorious Service Medal</a>	HON

[+ Add New Honors and Awards](#)

▼ Language Skills

There are currently no Language Skills for this profile. Please add one if required.

To **correct an existing content item**, click on the hyperlink within the summary grid. Update the data, click the OK button, and then click the Save button on the Person Profile page.

▼ Honors and Awards [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

ID	Honor and Award	Content Type
CG70	<a href="#">PHS Meritorious Service Medal</a>	HON

[+ Add New Honors and Awards](#)

▼ Language Skills

There are currently no Language Skills for this profile. Please add one if required.

To **add/delete a row for an existing content item**, click the hyperlink within the summary grid. Then, click the '+' or '-' icon to insert or delete a row. The counter will increase or decrease accordingly.

▼ Honors and Awards [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

ID	Honor and Award	Content Type
CG70	<a href="#">PHS Meritorious Service Medal</a>	HON

[+ Add New Honors and Awards](#)


▼ Language Skills

There are currently no Language Skills for this profile. Please add one if required.





**Step    Action**


**Details** [Find](#) | [View All](#) First 1 of 2 Last + -


\*Issue Date:  

Honor and Award:




\*Status:  

From Date:  

To Date:  

Grantor:  

To **delete a content item** entirely, click on the trash icon in summary grid for the row you wish to delete.

▼ Honors and Awards			Customize   Find   View All     First 1 of 1 Last
ID	Honor and Award	Content Type	
CG70	<a href="#">PHS Meritorious Service Medal</a>	HON	
<a href="#">+ Add New Honors and Awards</a>			
▼ Language Skills			
There are currently no Language Skills for this profile. Please add one if required.			

## EMERGENCY CONTACT

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**Introduction** This section provides procedures for adding/updating emergency contact data for a member.

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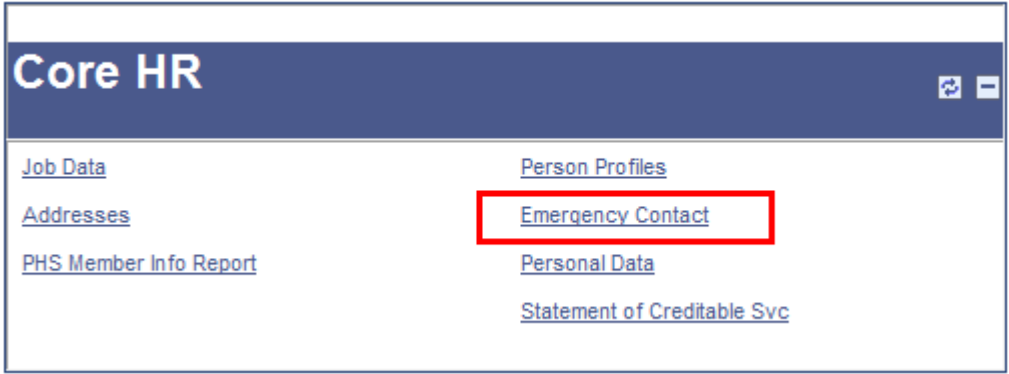
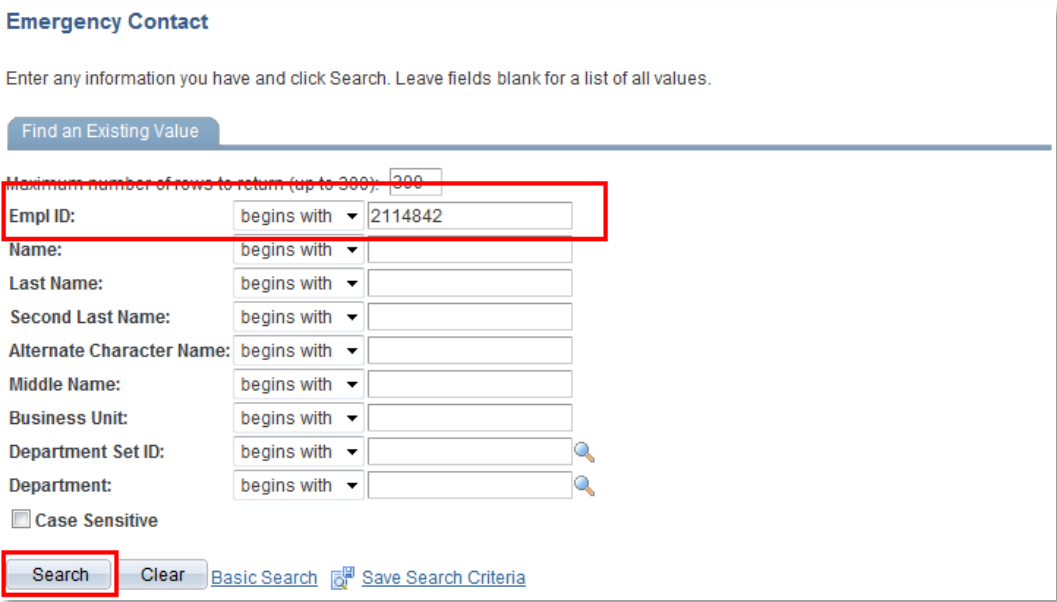
**Menu Path(s)** Menu Navigation: Workforce Administration > Personal Information > Personal Relationships > Emergency Contact  
Portal Pagelet: Core HR > Emergency Contact

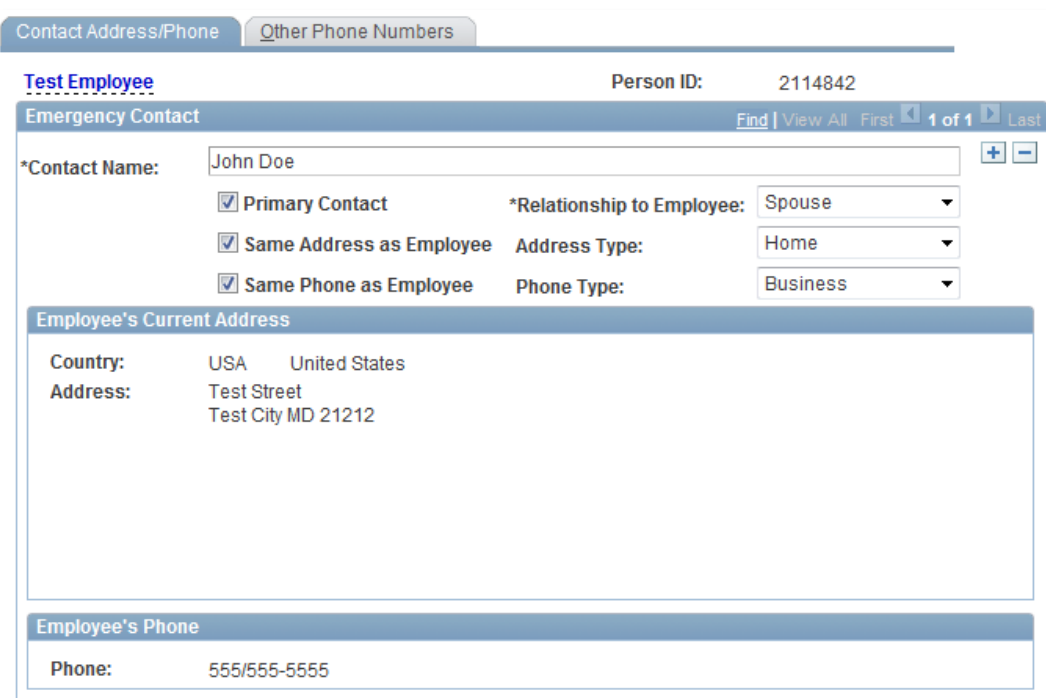
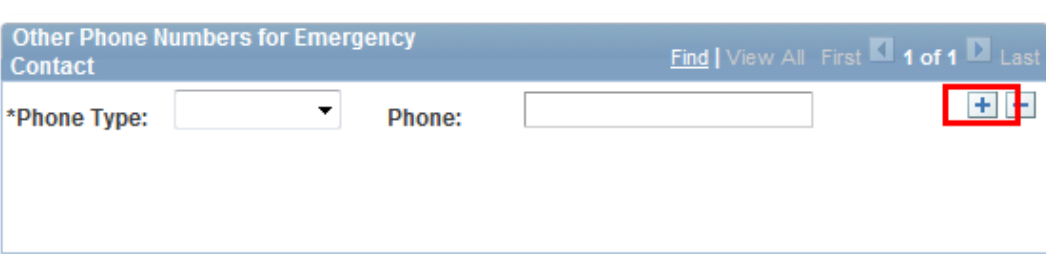
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- 

**Procedure** The following steps will show you how to add/update emergency contact data.

Step	Action
1	<p>Click the <b>Emergency Contact</b> link in the <b>Core HR</b> portal pagelet.</p> <p>Enterprise Menu navigation: Workforce Administration &gt; Personal Information &gt; Personal Relationships &gt; Emergency Contact</p>  <p>The screenshot shows the 'Core HR' portal pagelet. It has a blue header with the text 'Core HR' and two icons on the right. Below the header, there are two columns of links. The left column contains 'Job Data', 'Addresses', and 'PHS Member Info Report'. The right column contains 'Person Profiles', 'Emergency Contact' (highlighted with a red box), 'Personal Data', and 'Statement of Creditable Svc'.</p>
2	<p>On the Find an Existing Value search page, enter the member's employee ID in the <b>EmplID</b> field and click the <b>Search</b> button.</p>  <p>The screenshot shows the 'Emergency Contact' search page. It has a blue header with the text 'Emergency Contact'. Below the header, there is a text box with the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a blue button labeled 'Find an Existing Value'. Below the button is a form with the following fields: 'Maximum number of rows to return (up to 300):' with a value of '300', 'Empl ID:' with a dropdown menu set to 'begins with' and a text box containing '2114842' (highlighted with a red box), 'Name:', 'Last Name:', 'Second Last Name:', 'Alternate Character Name:', 'Middle Name:', 'Business Unit:', 'Department Set ID:', and 'Department:'. Each of these fields has a dropdown menu set to 'begins with' and a text box. At the bottom of the form is a checkbox labeled 'Case Sensitive'. Below the form is a blue button labeled 'Search' (highlighted with a red box), a grey button labeled 'Clear', a blue link labeled 'Basic Search', and a blue link labeled 'Save Search Criteria'.</p>
3	<p>On Contact Address/Phone page, enter the emergency contact name and other info. Click the Edit Address button to add/update the address for the emergency contact.</p> <p>If the 'Same Address as Employee' and/or 'Same Phone as Employee' checkbox is selected, you can select which address type and phone type to default as the emergency contact's.</p>

Step	Action
	 <p>The screenshot shows the 'Emergency Contact' form for a test employee. The form has two tabs: 'Contact Address/Phone' and 'Other Phone Numbers'. The 'Contact Address/Phone' tab is active. The form displays the following information:</p> <ul style="list-style-type: none"> <li><b>Test Employee</b> (Person ID: 2114842)</li> <li><b>Emergency Contact</b> (Find   View All First 1 of 1 Last) <ul style="list-style-type: none"> <li>*Contact Name: John Doe</li> <li><input checked="" type="checkbox"/> Primary Contact</li> <li><input checked="" type="checkbox"/> Same Address as Employee</li> <li><input checked="" type="checkbox"/> Same Phone as Employee</li> <li>*Relationship to Employee: Spouse</li> <li>Address Type: Home</li> <li>Phone Type: Business</li> </ul> </li> <li><b>Employee's Current Address</b> <ul style="list-style-type: none"> <li>Country: USA United States</li> <li>Address: Test Street</li> <li>Test City MD 21212</li> </ul> </li> <li><b>Employee's Phone</b> <ul style="list-style-type: none"> <li>Phone: 555/555-5555</li> </ul> </li> </ul>
4	Click the Other <b>Phone Numbers</b> tab.
5	<p>Enter any other phone numbers you wish to record for the emergency contact. Use the '+' icon in the 'Other Phone Numbers for Emergency Contact' section to insert more phone numbers.</p>  <p>The screenshot shows the 'Other Phone Numbers for Emergency Contact' form. It has a dropdown menu for '*Phone Type:' and a text field for 'Phone:'. A red box highlights the '+' icon in the bottom right corner of the form.</p>
6	Click the <b>Save</b> button.
7	To record additional emergency contacts, click the '+' icon in the Emergency Contact section on either page.

Step	Action
	<div><div><div>Contact Address/PhoneOther Phone Numbers</div><div><div>Test Employee</div><div>Person ID: 2114842</div><div>Emergency Contact<div>Find   View All   First2 of 2Last</div><div>*Contact Name:<div>+ -</div><div><div><input type="checkbox"/> Primary Contact</div><div>*Relationship to Employee: Other</div></div><div><input type="checkbox"/> Same Address as Employee</div><div><input type="checkbox"/> Same Phone as Employee</div></div><div>Contact Address<div>Country: USAUnited States</div></div></div></div></div><div><div>Contact Address/PhoneOther Phone Numbers</div><div><div>Test Employee</div><div>Person ID: 2114842</div><div>Emergency Contact<div>Find   View All   First2 of 2Last</div><div>Contact Name:<div>+ -</div><div>Relationship to Employee: Other<div><input type="checkbox"/> Primary Contact</div></div></div><div>Other Phone Numbers for Emergency Contact<div>Find   View All   First1 of 1Last</div></div></div></div></div></div>

## EMAIL ADDRESS

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**Introduction** This section provides procedures for adding/updating email addresses for a member.

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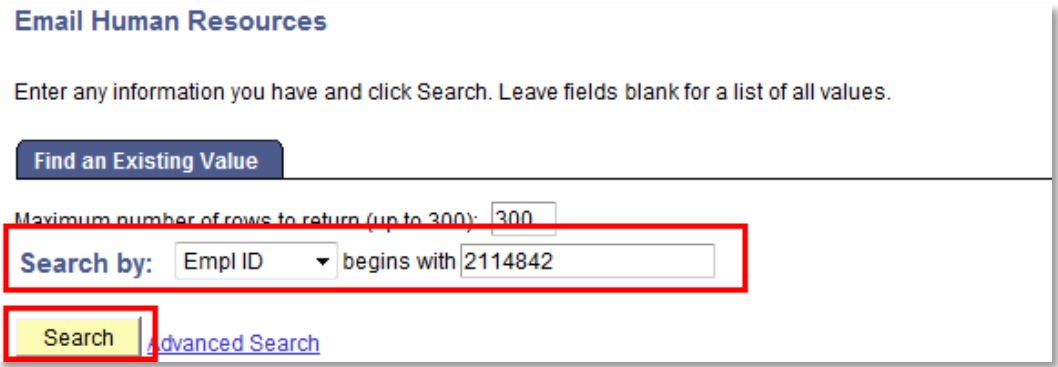
**Menu Path(s)** Menu Navigation: Human Resources > Email Address  
Portal Pagelet: HR Data Shortcuts > Email Address

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

- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
  - Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
  - Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)
- 

**Procedure** The following steps will show you how to add/update email address.

Step	Action
1	<p>Click the <b>Email Address</b> link in the <b>HR Data Shortcuts</b> portal pagelet.</p> <p>Enterprise Menu navigation: Human Resources &gt; Email Address</p> 
2	<p>On the Find an Existing Value search page, change the 'Search by' = Empl ID and enter the member's employee ID in 'begins with' field and click the Search button. You can also search based on User ID.</p>  <p>Click the <b>Search</b> button.</p>
3	<p>To <b>update an email address for an existing email type</b>, simply enter the email in the Email Address field and click the Save button.</p>

**Step Action****Email Address**

Test Employee

Email Addresses			
Email Type	Email Address	Preferred Address?	Delete
Business	test@test.com	<input checked="" type="checkbox"/>	Delete

Add Email Address

Save

To **delete an existing email address type**, click the Delete button and then the Save button.

**Email Address**

Test Employee

Email Addresses			
Email Type	Email Address	Preferred Address?	Delete
Business	test@test.com	<input checked="" type="checkbox"/>	Delete

Add Email Address

Save

To **add a new email address type**, click the Add Email Address button, select an email type, enter the email address, and then click the Save button.



**Step Action****Email Address**

Test Employee

Email Addresses			
Email Type	Email Address	Preferred Address?	Delete
Business	test@test.com	<input checked="" type="checkbox"/>	Delete
		<input type="checkbox"/>	Delete

Add Email Address

Save

At least one email address must always be designated as the **'Preferred Address'**.

**Email Address**

Test Employee

Email Addresses			
Email Type	Email Address	Preferred Address?	Delete
Business	test@test.com	<input checked="" type="checkbox"/>	Delete
Home	test@testhome.com	<input type="checkbox"/>	Delete

Add Email Address

Save

## PHS MEMBER INFO REPORT

---

**Introduction** This section provides procedures for running the PHS Member Info report for another PHS officer.

---

**Menu Path(s)** Menu Navigation: Human Resources > Human Resources Reports > Member Information (If there are two, select the second one. The first one is for self-service)



Portal Pagelet: Core HR > PHS Member Info

---

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

- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
  - Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
  - Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)
- 

**Procedure** The following steps will show you how to run the PHS Member Info report for a PHS Officer.

Step	Action
1	<p>Click on <b>PHS Member Info</b> link in the <b>Core HR</b> pagelet.</p> <p><b>Enterprise Menu</b> navigation: Human Resources &gt; Human Resources Reports &gt; Member Information (If there are two, select the second one. The first one is for self-service)</p>  <p>The screenshot shows the 'Core HR' pagelet with a dark blue header. Below the header, there are two columns of links. The link 'PHS Member Info Report' in the left column is highlighted with a red rectangular box. Other links include 'Job Data', 'Addresses', 'Person Profiles', 'Emergency Contact', 'Personal Data', and 'Statement of Creditable Svc'.</p>
2	<p>Enter the member's employee ID in the <b>Empl ID</b> field and click the <b>Create Report</b> button. The 'SPO IPDR' and 'Docs' links are for USCG use only. These do not pertain to PHS.</p>  <p>The screenshot shows the 'PHS Member Info Report' form. It has a title 'PHS Member Info Report' at the top. Below the title, there are two input fields: 'Empl ID:' with the value '2114842' and a search icon, and 'Empl Record:' with the value '0' and a search icon. Below these fields is a button labeled 'Create Report', which is highlighted with a red rectangular box. At the bottom of the form, there are two links: 'SPO IPDR' and 'Docs'.</p>
3	<p>The report output will display in <b>PDF</b> format.</p>

Step	Action
------	--------

## PHS OFFICER INFORMATION

<b>Identification</b>			
Name:		Employee ID:	
Status:	A	SERNO:	
<b>Home/Mailing/Business Addresses</b>			
Business Address:		Effective As Of:	02/11/2012
Mailing Address:		Effective As Of:	10/21/2010
Home Address:		Effective As Of:	10/21/2010
<b>Phone Numbers</b>			
Business Phone:			
Home Phone:			
<b>Email Addresses</b>			
Business Email:			
<b>Emergency Contacts</b>			
Name:		Relationship:	Brother
Name:		Relationship:	Spouse
<b>Employee Information</b>			
Birth Location:		Date of Birth:	
Country:	USA	Sex:	F
Marital Status:	Unknown		
<b>Ethnicity</b>			
Ethnic Group/Category:			
<b>Security Clearance</b>			
Agency:	OPM	SCI Eligible:	
Investigate Type:	SSBI	Investigate Date:	
Interim:		Interim Date:	
Clearance:		Clearance Granted:	
Call SECTEAM:	N		
Agency Granting Clearance:	HHS	Adjudication Status:	Favor 3
Adjudication Date:		SF312 Date:	

## OFFICER ACCOMPLISHMENT REPORT

---

**Introduction** This section provides procedures for running the Officer Accomplishment report.

---

**Menu Path(s)** Menu Navigation: Human Resources > Human Resources Reports > Profile Reports > Officer Accomplishment Report  
Portal Pagelet: Reports > Officer Accomplishments


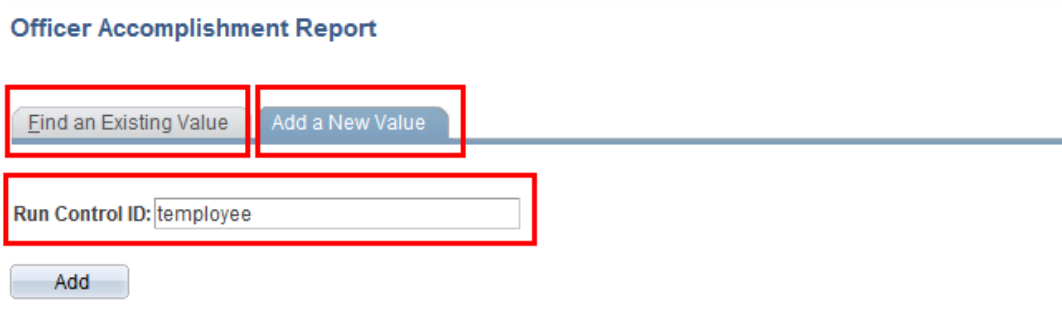
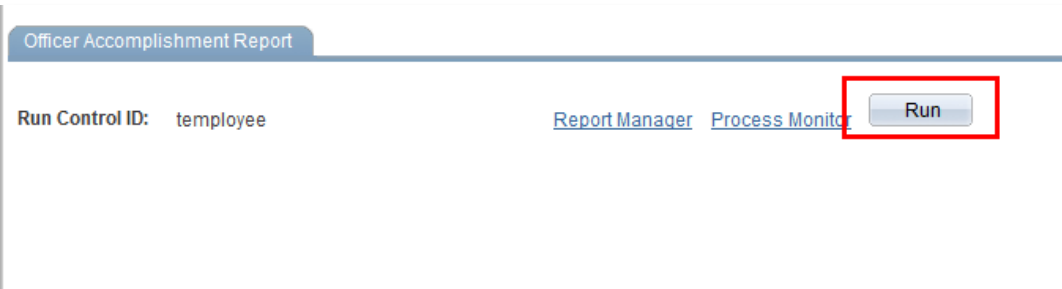
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**Need Help?** If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
- Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
- Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)

---

**Procedure** The following steps will show you how to run the Officer Accomplishments report.

Step	Action
1	<p>Click on the <b>Officer Accomplishments</b> link in the <b>Reports</b> pagelet.</p> <p><b>Enterprise Menu</b> navigation: Human Resources &gt; Human Resources Reports &gt; Profile Reports &gt; Officer Accomplishment Report</p> 
2	<p>Enter your run control ID on the Find an Existing Value tab. If you do not already have a run control ID for this report, click the Add a New Value tab and enter a run control ID.</p> <p><b>Officer Accomplishment Report</b></p> 
3	<p>Click the <b>Add</b> button if you're adding a new run control ID (click the Search button if you're using an existing run control ID).</p>
4	<p>On the <b>Officer Accomplishment Report</b> page, click the <b>Run</b> button.</p> 
5	<p>On the <b>Process Scheduler Request</b> page, click the <b>OK</b> button. You will be returned to the Officer Accomplishment Report page.</p>

Step	Action																				
	<div><div>Process Scheduler Request</div><div><div>User ID:</div><div>Run Control ID: employee</div></div><div><div>Server Name:</div><div>Run Date: 12/21/2015</div><div>Recurrence:</div><div>Run Time: 3:49:19PM</div><div>Reset to Current Date/Time</div></div><div><div>Time Zone:</div></div><div><div>Process List</div><table><tr><th>Select</th><th>Description</th><th>Process Name</th><th>Process Type</th><th>*Type</th><th>*Format</th><th>Distribution</th></tr><tr><td><input checked="" type="checkbox"/></td><td>PHS Officer Accomp Report</td><td>CG_OFCCR_ACOMP</td><td>Application Engine</td><td>Web</td><td>TXT</td><td><a href="#">Distribution</a></td></tr></table></div><div><div>OK</div><div>Cancel</div></div></div>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input checked="" type="checkbox"/>	PHS Officer Accomp Report	CG_OFCCR_ACOMP	Application Engine	Web	TXT	<a href="#">Distribution</a>						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution															
<input checked="" type="checkbox"/>	PHS Officer Accomp Report	CG_OFCCR_ACOMP	Application Engine	Web	TXT	<a href="#">Distribution</a>															
6	<div><div>Click the <b>Process Monitor</b> link.</div><div><div>Officer Accomplishment Report</div><div><div>Run Control ID: employee</div><div><div>Report Manager</div><div>Process Monitor</div><div>Run</div></div></div></div></div>																				
7	<div><div>On the <b>Process List</b> page, click the <b>Refresh</b> button. Keep clicking the button until the <b>Run Status = Success AND Distribution Status = Posted</b>.</div><div><div><div>Process List</div><div>Server List</div></div><div><div>View Process Request For</div><div><div>User ID:</div><div>Type:</div><div>Last</div><div>1</div><div>Days</div><div>Refresh</div></div><div><div>Server:</div><div>Name:</div><div>Instance:</div><div>to</div></div><div><div>Run Status:</div><div>Distribution Status:</div><div>Save On Refresh</div></div></div><div><div>Process List</div><div>Customize   Find   View All   First 1 of 1 Last</div><table><tr><th>Select</th><th>Instance</th><th>Seq.</th><th>Process Type</th><th>Process Name</th><th>User</th><th>Run Date/Time</th><th>Run Status</th><th>Distribution Status</th><th>Details</th></tr><tr><td><input type="checkbox"/></td><td>271610</td><td></td><td>Application Engine</td><td>CG_OFCCR_ACOMP</td><td></td><td>12/21/2015 3:49:19PM PST</td><td>Success</td><td>Posted</td><td><a href="#">Details</a></td></tr></table></div></div></div>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	<input type="checkbox"/>	271610		Application Engine	CG_OFCCR_ACOMP		12/21/2015 3:49:19PM PST	Success	Posted	<a href="#">Details</a>
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details												
<input type="checkbox"/>	271610		Application Engine	CG_OFCCR_ACOMP		12/21/2015 3:49:19PM PST	Success	Posted	<a href="#">Details</a>												
8	<div><div>Once the Run Status = Success and Distribution Status = Posted, click the <b>Details</b> link.</div></div>																				

Step

Action

Process List

Server List

View Process Request For

User ID:

Type:

Last

1

Days

Refresh

Server:

Name:

Instance:

to

Run Status:

Distribution Status:

Save On Refresh

Process List

Customize

Find

View All

First

1 of 1

Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	271610		Application Engine	CG_OFCCR_ACMP		12/21/2015 3:49:19PM PST	Success	Posted	Details

9

On the **Process Detail** page, click the **View Log/Trace** link.

Process Detail

Process

Instance:

271610

Type:

Application Engine

Name:

CG\_OFCCR\_ACMP

Description:

PHS Officer Accomp Report

Run Status:

Success

Distribution Status:

Posted

Run

Update Process

Run Control ID:

employee

Location:

Server

Server:

PSUNX

Recurrence:

Hold Request

Queue Request

Cancel Request

Delete Request

Restart Request

Date/Time

Actions

Request Created On:

12/21/2015 3:51:11PM PST

Run Anytime After:

12/21/2015 3:49:19PM PST

Began Process At:

12/21/2015 3:51:30PM PST

Ended Process At:

12/21/2015 4:05:31PM PST

Parameters

Transfer

Message Log

View Locks

Batch Timings

View Log/Trace

10

On the **View Log/Trace** page, click the **Officer Accomplishments Report.csv** report link.



Step	Action									
	<div><div>View Log/Trace</div><div><div>Report</div><div>Report ID: 227078      Process Instance: 271610      <a href="#">Message Log</a> Name: CG_OFCR_ACMF      Process Type: Application Engine Run Status: Success  PHS Officer Accomp Report</div><div>Distribution Details</div><div>Distribution Node: RPTNODE      Expiration Date: 12/28/2015</div><div>File List</div><table><thead><tr><th>Name</th><th>File Size (bytes)</th><th>Datetime Created</th></tr></thead><tbody><tr><td>AF CG OFCR_ACMF_271610.stdout</td><td>341</td><td>12/21/2015 4:05:31.058686PM PST</td></tr><tr><td>Officer Accomplishments Report.csv</td><td>3,005,722</td><td>12/21/2015 4:05:31.058686PM PST</td></tr></tbody></table></div></div>	Name	File Size (bytes)	Datetime Created	AF CG OFCR_ACMF_271610.stdout	341	12/21/2015 4:05:31.058686PM PST	Officer Accomplishments Report.csv	3,005,722	12/21/2015 4:05:31.058686PM PST
Name	File Size (bytes)	Datetime Created								
AF CG OFCR_ACMF_271610.stdout	341	12/21/2015 4:05:31.058686PM PST								
Officer Accomplishments Report.csv	3,005,722	12/21/2015 4:05:31.058686PM PST								
11	<p>A message box will display.    Select <b>Open</b> to open the report now or <b>Save/Save as</b> to save the document first.</p> <div><div>Windows Internet Explorer</div><div>What do you want to do with Officer Accomplishments Report.xls?  From: hcenv3.direct-access.us</div><div><div>→ Open The file won't be saved automatically.</div><div>→ Save</div><div>→ Save as</div></div><div>Cancel</div></div>									
12	<p>The report will open in <b>Microsoft Excel</b>.</p>									

**Step    Action**

UNCLASSIFIED

Empl Id	Name	Serial Number	Rank	Employee Class	Category Discipline	Business Email	Business Phone
2			CAPT Pharmacist	Regular	Pharmacist		
3			LCDR Nurse Officer	Selected Reserve	Nurse		
4			ENS HSO-General	Inactive Ready Reserve	HSO-General		
5			CDR Pharmacological Scientist	Regular	Pharmacological Scientist		
6			CDR Microbiologist	Regular	Microbiologist		
7			CDR Microbiologist	Regular	Microbiologist		
8			ENS HSO-General	Inactive Ready Reserve	HSO-General		
9			ENS HSO-General	Inactive Ready Reserve	HSO-General		

## ROSTER REPORT

---

**Introduction** This section provides procedures for running the PHS Roster report.

---

**Menu Path(s)** Menu Navigation: Human Resources > Human Resources Reports > Profile Reports > Roster Report  
Portal Pagelet: Reports > Roster


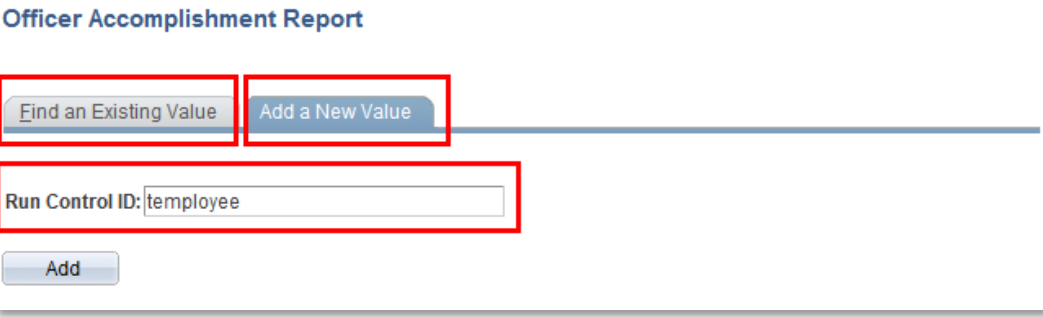
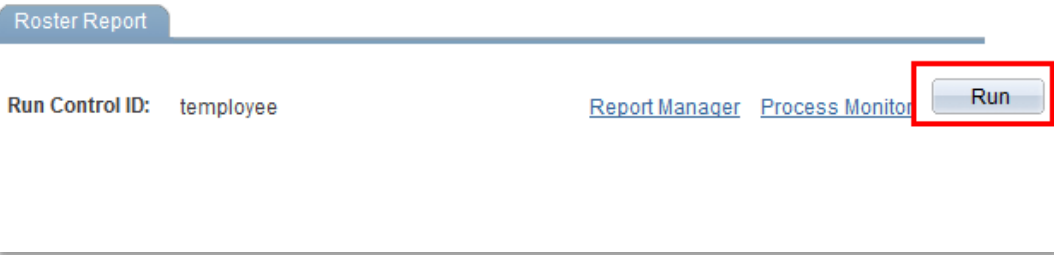
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**Need Help?** If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
- Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
- Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)

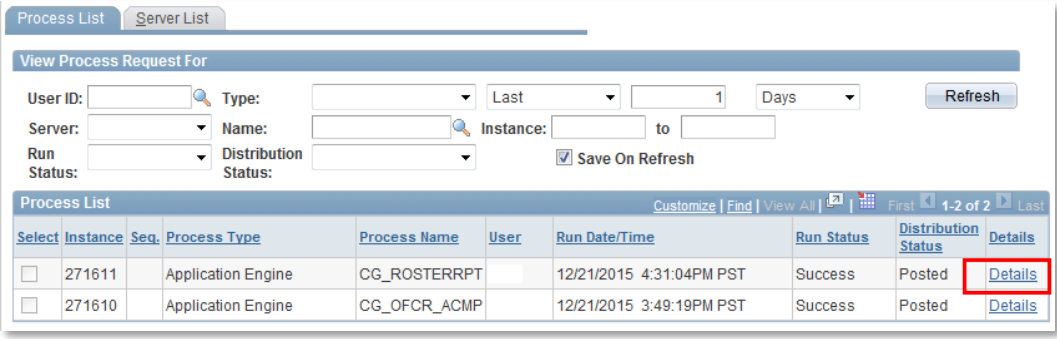
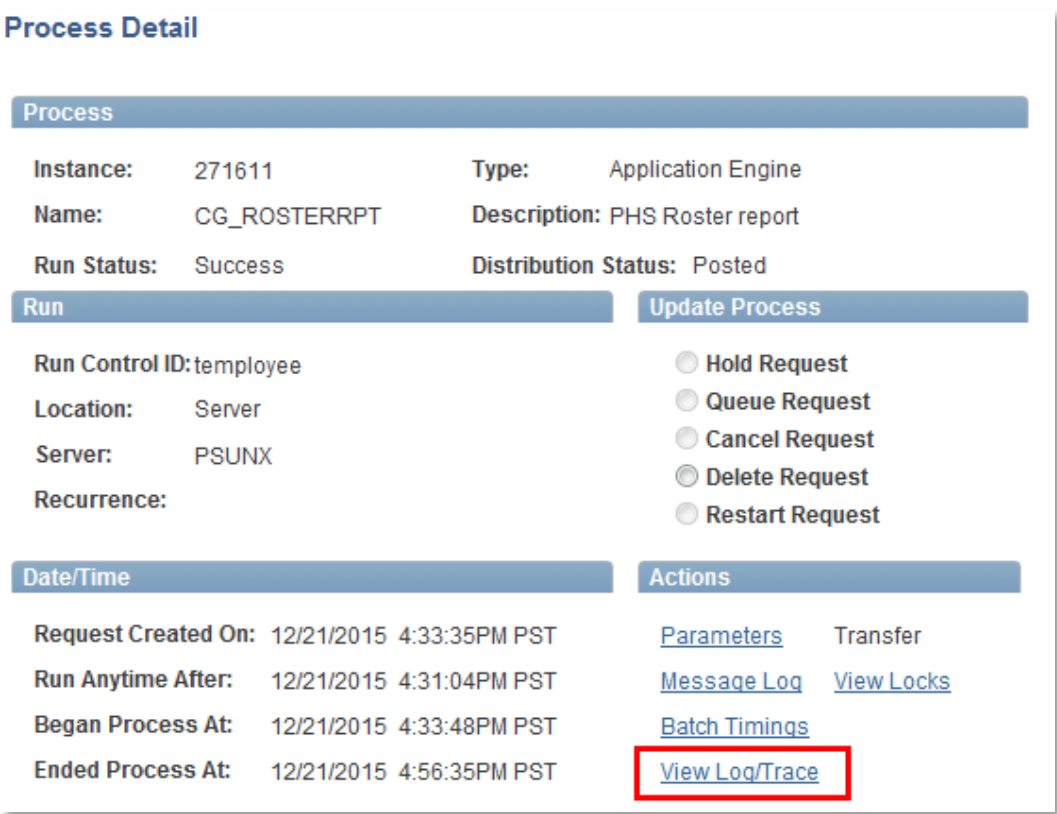
---

**Procedure** The following steps will show you how to run the Roster report.

Step	Action
1	<p>Click on the <b>Roster</b> link in the <b>Reports</b> pagelet.</p> <p><b>Enterprise Menu</b> navigation: Human Resources &gt; Human Resources Reports &gt; Profile Reports &gt; Roster Report</p> 
2	<p>Enter your run control ID on the Find an Existing Value tab. If you do not already have a run control ID for this report, click the Add a New Value tab and enter a run control ID.</p> 
3	<p>Click the <b>Add</b> button if you're adding a new run control ID (click the Search button if you're using an existing run control ID).</p>
4	<p>On the <b>Roster Report</b> page, click the <b>Run</b> button.</p> 
5	<p>On the <b>Process Scheduler Request</b> page, click the <b>OK</b> button. You will be returned to the Roster Report page.</p>

Step	Action																														
	<div><h3>Process Scheduler Request</h3><div><div>User ID:<div></div></div><div>Run Control ID: employee</div></div><div><div>Server Name:<div>PSUNX</div></div><div>Run Date:<div>12/21/2015</div></div><div>Recurrence:<div></div></div><div>Run Time:<div>4:31:04PM</div></div><div>Time Zone:<div></div></div><div>Reset to Current Date/Time</div></div><div><div>Process List</div><table><tr><th>Select</th><th>Description</th><th>Process Name</th><th>Process Type</th><th>*Type</th><th>*Format</th><th>Distribution</th></tr><tr><td><input checked="" type="checkbox"/></td><td>PHS Roster report</td><td>CG_ROSTERRPT</td><td>Application Engine</td><td>Web</td><td>TXT</td><td><a href="#">Distribution</a></td></tr></table></div><div><div>OK</div><div>Cancel</div></div></div>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input checked="" type="checkbox"/>	PHS Roster report	CG_ROSTERRPT	Application Engine	Web	TXT	<a href="#">Distribution</a>																
Select	Description	Process Name	Process Type	*Type	*Format	Distribution																									
<input checked="" type="checkbox"/>	PHS Roster report	CG_ROSTERRPT	Application Engine	Web	TXT	<a href="#">Distribution</a>																									
6	<div><div>Click the <b>Process Monitor</b> link.</div><div><div><div>Roster Report</div></div><div><div>Run Control ID: employee</div><div><a href="#">Report Manager</a> <a href="#">Process Monitor</a> <div>Run</div></div><div>Process Instance:271611</div></div></div></div>																														
7	<div><div>On the <b>Process List</b> page, click the <b>Refresh</b> button. Keep clicking the button until the <b>Run Status = Success AND Distribution Status = Posted</b>.</div><div><div><div>Process List</div><div>Server List</div></div><div><div>View Process Request For</div><div><div>User ID:<div></div></div><div>Type:<div></div></div><div>Last:<div></div></div><div>1</div><div>Days</div></div><div>Refresh</div></div><div><div>Server:<div></div></div><div>Name:<div></div></div><div>Instance:<div></div> to <div></div></div></div><div><div>Run Status:<div></div></div><div>Distribution Status:<div></div></div><div>Save On Refresh</div></div></div><div><div>Process List</div><div>Customize   Find   View All   1-2 of 2   Last</div><table><tr><th>Select</th><th>Instance</th><th>Seq.</th><th>Process Type</th><th>Process Name</th><th>User</th><th>Run Date/Time</th><th>Run Status</th><th>Distribution Status</th><th>Details</th></tr><tr><td><input type="checkbox"/></td><td>271611</td><td></td><td>Application Engine</td><td>CG_ROSTERRPT</td><td></td><td>12/21/2015 4:31:04PM PST</td><td>Success</td><td>Posted</td><td><a href="#">Details</a></td></tr><tr><td><input type="checkbox"/></td><td>271610</td><td></td><td>Application Engine</td><td>CG_OFCCR_ACMF</td><td></td><td>12/21/2015 3:49:19PM PST</td><td>Success</td><td>Posted</td><td><a href="#">Details</a></td></tr></table></div></div>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	<input type="checkbox"/>	271611		Application Engine	CG_ROSTERRPT		12/21/2015 4:31:04PM PST	Success	Posted	<a href="#">Details</a>	<input type="checkbox"/>	271610		Application Engine	CG_OFCCR_ACMF		12/21/2015 3:49:19PM PST	Success	Posted	<a href="#">Details</a>
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details																						
<input type="checkbox"/>	271611		Application Engine	CG_ROSTERRPT		12/21/2015 4:31:04PM PST	Success	Posted	<a href="#">Details</a>																						
<input type="checkbox"/>	271610		Application Engine	CG_OFCCR_ACMF		12/21/2015 3:49:19PM PST	Success	Posted	<a href="#">Details</a>																						

| 8 | Once the Run Status = Success and Distribution Status = Posted, click the **Details** link. |

Step	Action
	
9	<p>On the <b>Process Detail</b> page, click the <b>View Log/Trace</b> link.</p> 
10	<p>On the <b>View Log/Trace</b> page, click the <b>PHSRosterReport.csv</b> report link.</p>

Step	Action									
	<div><div>View Log/Trace</div><div><div>Report</div><div>Report ID: 227079      Process Instance: 271611      <a href="#">Message Log</a> Name: CG_ROSTERRPT      Process Type: Application Engine Run Status: Success  PHS Roster report</div><div>Distribution Details</div><div>Distribution Node: RPTNODE      Expiration Date: 12/28/2015</div><div>File List</div><table><thead><tr><th>Name</th><th>File Size (bytes)</th><th>Datetime Created</th></tr></thead><tbody><tr><td><a href="#">AF_CG_ROSTERRPT_271611_stdout</a></td><td>121,136</td><td>12/21/2015 4:56:35.425270PM PST</td></tr><tr><td><a href="#">PHSRosterReport.csv</a></td><td>3,213,610</td><td>12/21/2015 4:56:35.425270PM PST</td></tr></tbody></table></div></div>	Name	File Size (bytes)	Datetime Created	<a href="#">AF_CG_ROSTERRPT_271611_stdout</a>	121,136	12/21/2015 4:56:35.425270PM PST	<a href="#">PHSRosterReport.csv</a>	3,213,610	12/21/2015 4:56:35.425270PM PST
Name	File Size (bytes)	Datetime Created								
<a href="#">AF_CG_ROSTERRPT_271611_stdout</a>	121,136	12/21/2015 4:56:35.425270PM PST								
<a href="#">PHSRosterReport.csv</a>	3,213,610	12/21/2015 4:56:35.425270PM PST								
11	<p>A message box will display.    Select <b>Open</b> to open the report now or <b>Save/Save as</b> to save the document first.</p> <div><div>Windows Internet Explorer</div><div>What do you want to do with Officer Accomplishments Report.xls?  From: hcenv3.direct-access.us</div><div><div>→ Open The file won't be saved automatically.</div><div>→ Save</div><div>→ Save as</div></div><div>Cancel</div></div>									
12	The report will open in <b>Microsoft Excel</b> .									

**Step    Action**

UNCLASSIFIED

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	EmpId	Rank	Temp Grade	Temp Grade Entry Date	Name	Semo	Employee Class	DeptId	Dept Name	Retirement Credit Date	Date of Rank	Report Date	Position Nbr
2	4	RACM	O8	8/1/2008			AD	20469	HSAC70098	6/22/1986	8/1/2008	8/1/2008	105506
3		RACM	O7	5/14/2010			AD	10913	ACM	1/5/1988	5/14/2010	11/30/2010	102139
4		RACM	O8	2/1/2009			AD	21790	RV	3/21/1984	2/1/2009	2/1/2009	102505
5		RACM	O7	8/24/2009			AD	36911	RA12	7/25/1986	8/24/2009	5/29/2010	102506
6		CAPT	O6	12/31/2008			AD	11630	COG	5/9/1986	12/31/2008	12/31/2008	102594
7		CAPT	O6	11/1/2009			AD	11595	CCA	8/3/1988	11/1/2009	11/1/2009	102647
8		RACM	O8	5/31/2009			AD	12398	DAL	7/3/1983	5/31/2009	5/31/2009	102686
9		RACM	O8	5/31/2009			AD	12398	DAL	7/3/1983	5/31/2009	5/31/2009	102686



## EXPIRING LICENSES REPORT

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**Introduction** This section provides procedures for running the Expiring Licenses report.

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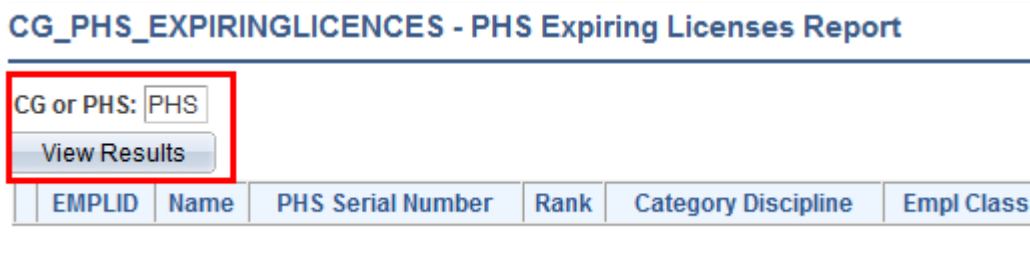
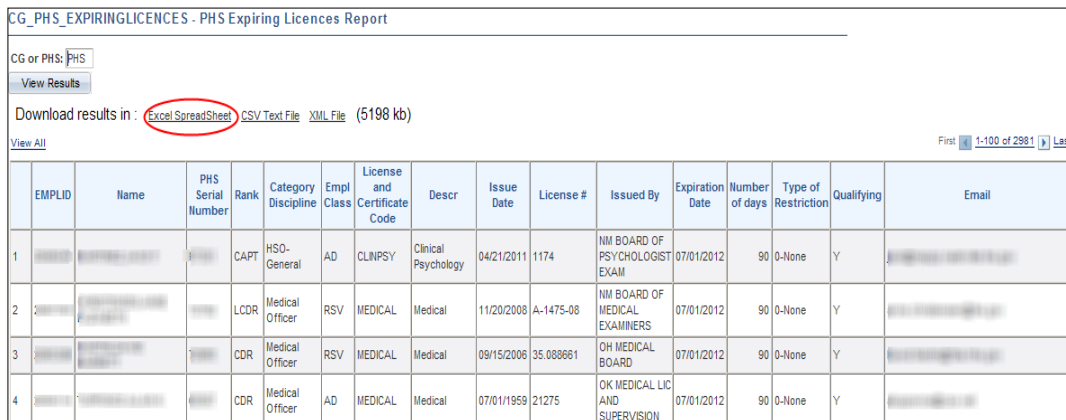
**Menu Path(s)** Menu Navigation: Human Resources > Human Resources Reports > Profile Reports > PHS Expiring Licenses Report  
Portal Pagelet: Core HR > Expiring Licenses

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

- The web address for support is <http://www.uscg.mil/ppc/ccb/>.
  - Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
  - Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)
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**Procedure** The following steps will show you how to run the Expiring Licenses report.

Step	Action
1	<p>Click on <b>Expiring Licenses</b> link in the <b>Reports</b> pagelet.</p> <p><b>Enterprise Menu</b> navigation: Human Resources &gt; Human Resources Reports &gt; Profile Reports &gt; PHS Expiring Licenses Report</p> 
2	<p>Enter <b>PHS</b> in the field and then click the <b>View Results</b> button.</p> 
3	<p>The output of the report will launch in the system browser. If preferred, click Download results in Excel Spreadsheet to view the output in Microsoft Excel.</p>  <p><b>NOTE:</b> This report will NOT report officer's who are missing an email address on their record.</p>

## LICENSE VALIDATION REPORT

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**Introduction** This section provides procedures for running the License Validation report.

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**Menu Path(s)** Menu Navigation: Human Resources > Human Resources Reports > Profile Reports > License rows validation report  
Portal Pagelet: Reports > License Validation

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

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  - Customer Service phone number is: (866) 772-8724 (toll free) or (785) 339-2200.
  - Phone support hours are 0700-1600 (central time) Monday through Friday (and select weekends as posted on <http://www.uscg.mil/ppc/ccb/>.)
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**Procedure** The following steps will show you how to run the License Validation report.

Step	Action
1	<p>Click on <b>License Validation</b> link in the <b>Reports</b> pagelet.</p> <p><b>Enterprise Menu</b> navigation: Human Resources &gt; Human Resources Reports &gt; Profile Reports &gt; License rows validation report</p> 
2	<p>The output of the report will launch in the system browser. If preferred, click Download results in Excel Spreadsheet to view the output in Microsoft Excel.</p> 