PHS PCS Orders
User Guide

Version 1.0

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CREATE ORDER

Introduction   This section provides procedures for creating a PCS order for a PHS member. These orders are considered 'no-cost'. The member must have an EmplID in Direct Access and the order begin and end dates cannot be before a member's hire date on their job data record.
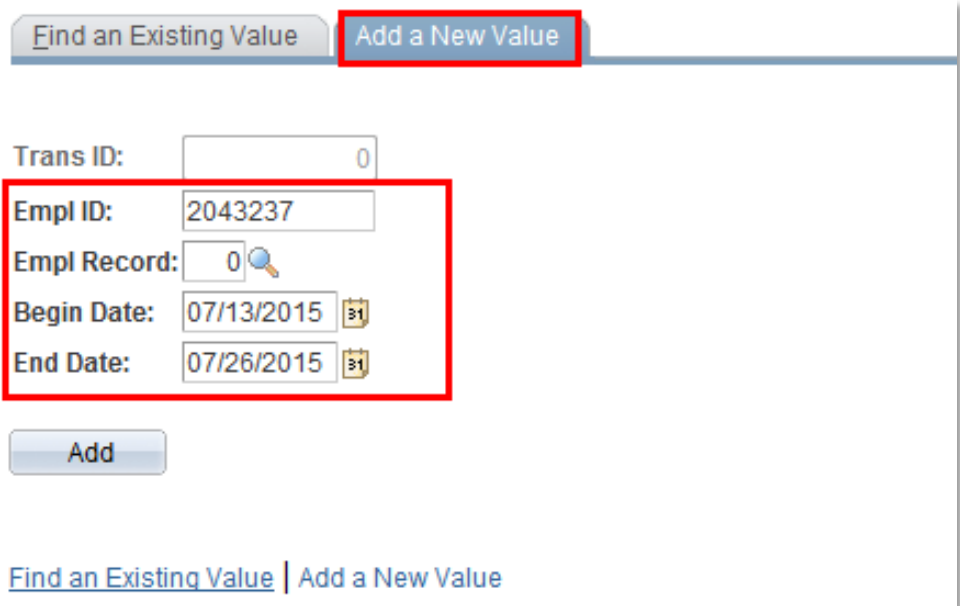
Menu Path(s)   Menu Navigation: Orders > PCS Orders
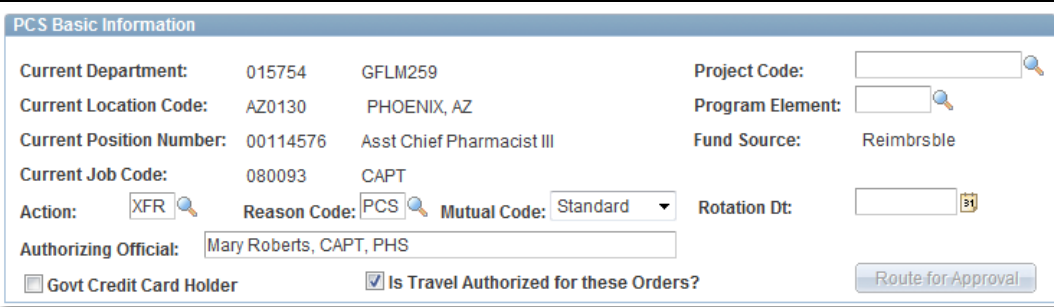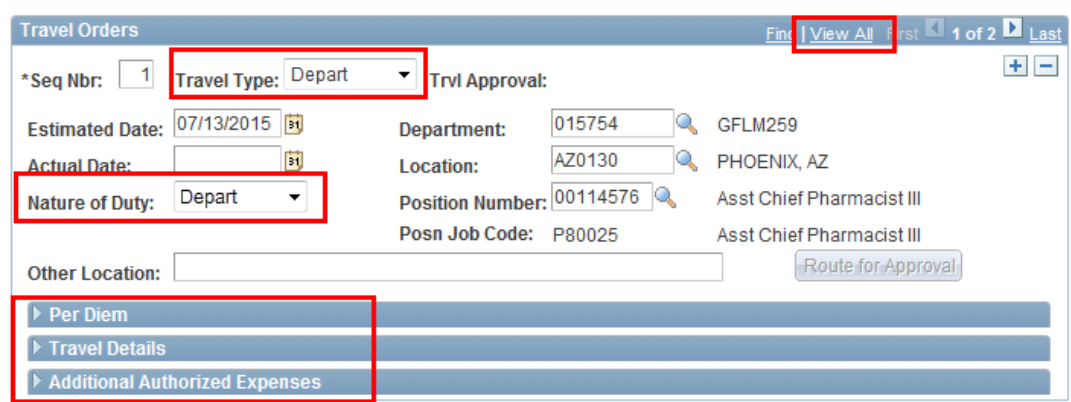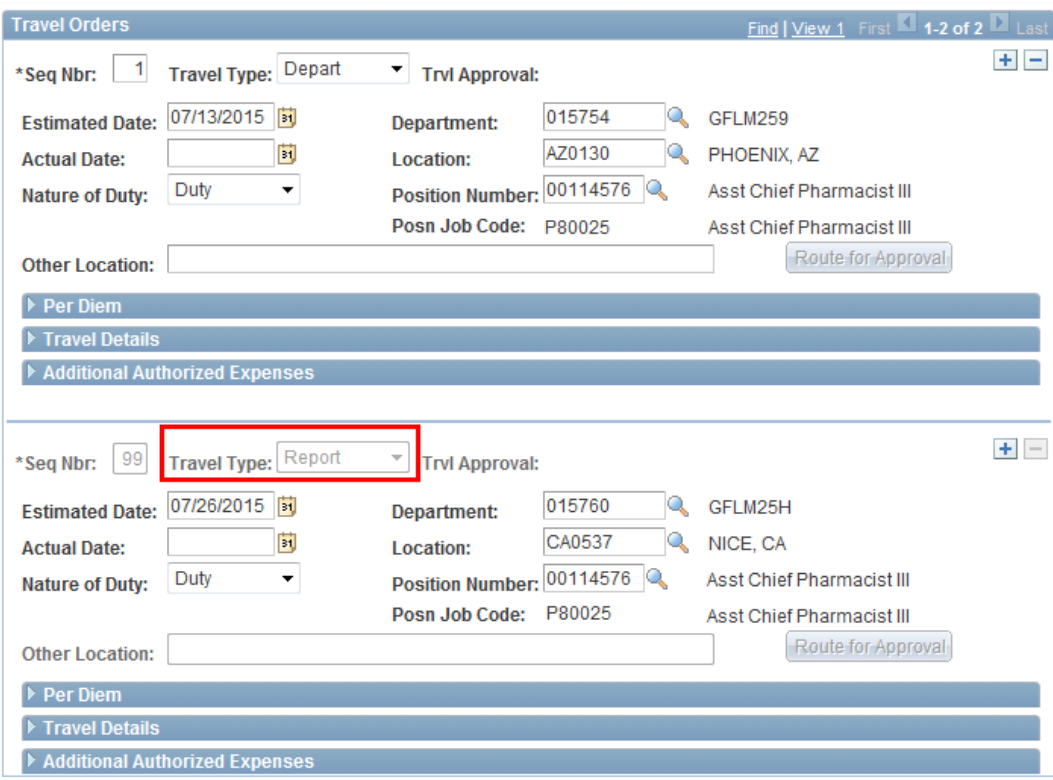
Portal Pagelet: Orders > PCS Orders

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 create and save a PCS order.

Step	Action
1	Click on the **PCS Orders** link in the Orders portal pagelet. Enterprise Menu navigation: Orders > PCS Orders
2	On the PCS Orders search page, click the **Add a New Value** tab. Enter the following: ▪ **Empl ID** = member's employee ID ▪ **Empl Record** = click the look up and then select the row where Regulatory Region = PHS and Business Unit = OFFPH or OFEPH. ▪ **Begin Date/End Date** = enter when the member is expected to depart and report at their new assignment. *i* For PCS orders where the member departs and reports to their new assignment on the same day (e.g. interoffice transfer), enter the same dates as the begin and end dates. Click the **Add** button.
3	In the PCS Basic Information section, enter/select any relevant information. Project Code and Program Element fields are for USCG use only. DO NOT CHANGE THE ACTION AND REASON CODE DEFAULTS.

Step	Action
4	In the Travel Orders section, for the **Depart** travel type, select the following: ▪ **Nature of Duty** = Depart Add additional depart-related information in the **Per Diem**, **Travel Details**, and/or **Additional Authorized Expenses** section. Expand each section by clicking the arrow. Leave the Actual Date field blank. This date is entered when the member departs and the Departing Details is submitted for approval. Then, click the **View All** link. This will display both the Depart and Report travel rows. ℹ️ The Estimated Dates default from the Begin Date and End Date entered on the Add a New Value page.
5	For the **Report** row, enter/select: ▪ **Department** ▪ **Location** ▪ **Position** ▪ **Nature of Duty** Leave the Actual Date field blank. This date is entered when the member reports and the Reporting Details is submitted for approval.

Step	Action
6	In the **Delay En Route** section, enter the member's travel delays (if there are any gaps in the Begin and End dates, these days must be accounted for in the Delay En Route section).
	When entering Delay En Route, the first Begin Date must be the day after the Estimated Date to Depart. The last End Date must be the same as the Estimated Date to Report.

Step	Action

1) These dates cannot overlap each other.
2) These dates cannot overlap an already scheduled leave.
3) If the member has planned TDY en route, use the Formal Training option to account for that delay.   If the member has multiple leave periods, combine the leave into one row and place it before the Formal Training.   Then, break down the Delay En Route in the Order Notes.
4) For orders involving leave only, use the Actual Day of Report value to avoid a system error.

Any leave indicated here will trigger an absence event when the order detail is approved.   This absence event will deduct from the member's leave balance when the begin/end dates are hit.

| 7 | If the member has dependents, click the arrow to open the **Dependents Authorized for Travel** section. |

Step	Action
8	Check the **Auth for Travel** checkbox for each dependent that is authorized to travel. If dependents aren't listed, use the look up to search for each dependent. ⓘ Dependents must be first added as dependents using the Dependent/Beneficiary component to be listed here.
9	Click the **Notes** tab to enter the member's reporting location address and other contract clauses (if applicable).
10	In the Contract Clauses section, enter/select the following: • **Contract Clause** = click the look up and select the '#02' value • **Sequence Number** = 01 • **Show on Printed Order** = checked In the Notes field, 'Reporting Address:' text will display. Enter the reporting address below this text. If other contract clauses are necessary, click the + icon to insert a row and select/enter the contract clause and sequence number. ⓘ The sequence number determines in which order the clause displays on the printed order.
11	Click the **Save** button. Upon save, the Itinerary section will display the travel details

Step	Action

Itinerary								Customize | Find |		First 1-4 of 4 Last
Seq Nbr	Travel Type	Travel Approval	Estimated Date	Actual Date	Nature of Duty	Deptid Description	Position Description	Location Description
1	Depart		07/13/2015		Duty	GFLM259	Asst Chief Pharmacist III	PHOENIX, AZ
			07/14/2015		Leave INCONUS			
			07/23/2015		Travel Time			
99	Report		07/26/2015		Duty	GFLM25H	Asst Chief Pharmacist III	OAKLEY, CA

SUBMIT FOR APPROVALS

Introduction   This section provides procedures for submitting a PCS order for approvals. After an order is created and saved, the following must be routed for approvals:

- Order Details
- Depart Details
- Report Details
- Multiple Details

Menu Path(s)   Menu Navigation: Orders > PCS Orders
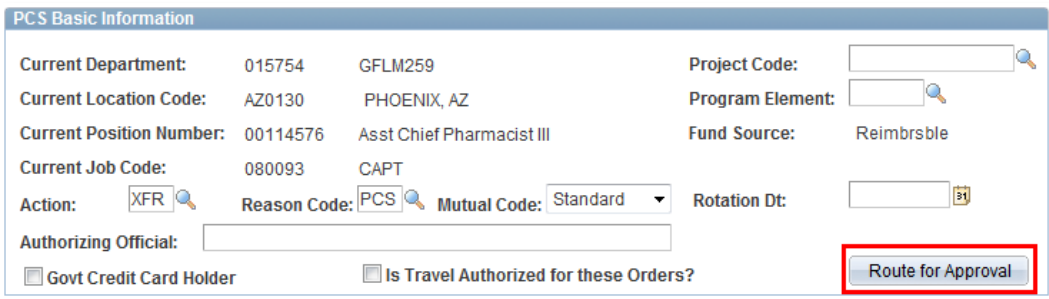
Portal Pagelet: Orders > PCS Orders

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/.
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- 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 submit an order for approval. All fields with an asterisk (*) are required fields.

Step	Action
1	After an order is created and saved, the **Route for Approval** button in the PCS Basic Information section will become active. Click the **Route for Approval** button to route the order details for approval. You must initiate this approval process by clicking this button.
2	In the Route for Approval section, select/enter: ▪ **Approval Type** = PCS Travel Details Approval ▪ **Comment** = enter any comments Click the **Submit** button.
3	After submission, the PCS Travel Details Approval section will display. Click the Multiple Approvers link to view a list of the approvers. Only one of these approvers has to approve the request.

Step	Action
4	After the Order details have been approved, the Request for Approval button becomes active for the Depart and Report row.
5	Repeat these steps to submit the Depart details for approval. Enter the Actual Date for the Depart row and click the Request for Approval button from the Depart row. After the Depart details have been approved, enter the Actual Date for the Report row and click the Request for Approval button from the Report row. **Actual Dates cannot be future dates but can be past dates.** If Actual Dates differ from the Estimated Dates, you will be required to update the Delay En Route data accordingly.

Step	Action
	❗ When the Reporting row is approved, the member's job data record is updated with the Report details. If a message displays indicating that the job data row could not be inserted, this generally means that the member's job data record has another job data row with an effective date that is after the report date. PCS Orders can only insert a job data row when it's top-of-stack. You must contact PPC to insert the job data row.
6	In some cases, depart and report details can be submitted for approvals together. This is known as 'Multiple Trvl Endorsement'.
	In this case, an Actual Date must be indicated for **both** the Depart and Report row and neither date can be after the current date. Then, the Route for Approval button must be selected from the Report row only. When selected, the Approval Type will default to 'Multiple Tvl Endorsements'. This indicates that both depart and report details are being submitted for approval.

Step	Action

APPROVE ORDERS

Introduction   This section provides procedures for approving/denying PCS order approval requests.   The following will require approvals:

- Order Travel Details
- Departing Endorsement
- Reporting Endorsement
- Multiple Trvl Endorsement
- Order Cancellation
- Order Amendment

After each order type has been approved, the order status will change to the following:

- Order Travel Details → Ready
- Departing Endorsement → En route
- Reporting Endorsement → Finished
- Multiple Trvl Endorsement → Finished
- Cancel Order → Cancelled

Menu Path(s)   Menu Navigation: Human Resources > Requests > View My Requests
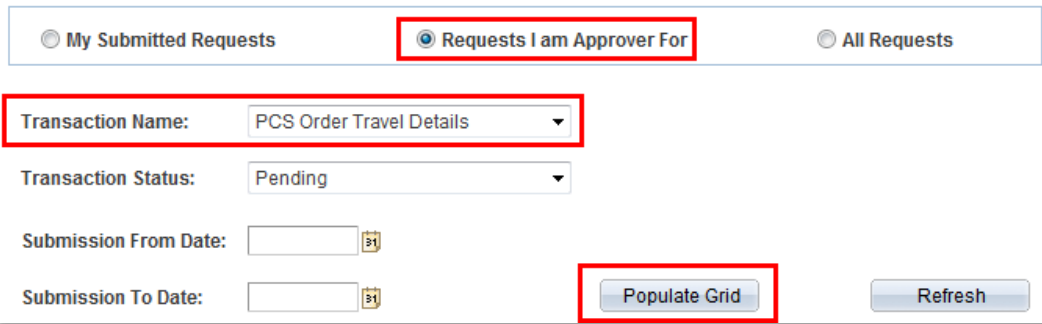
Portal Pagelet: Requests tab > Requests > View My Requests (All Type)
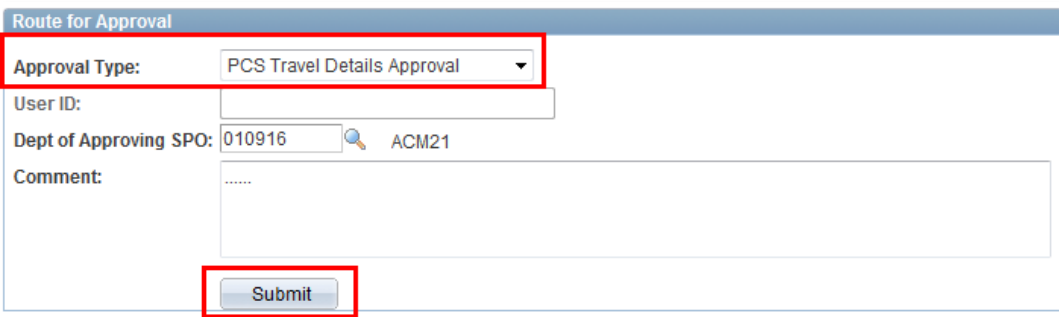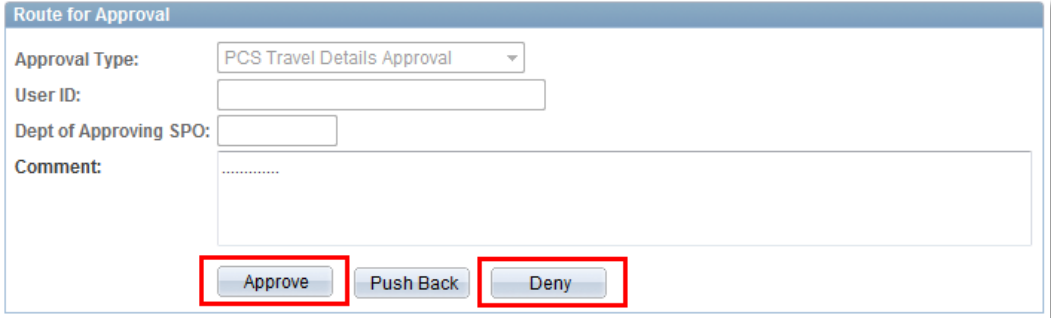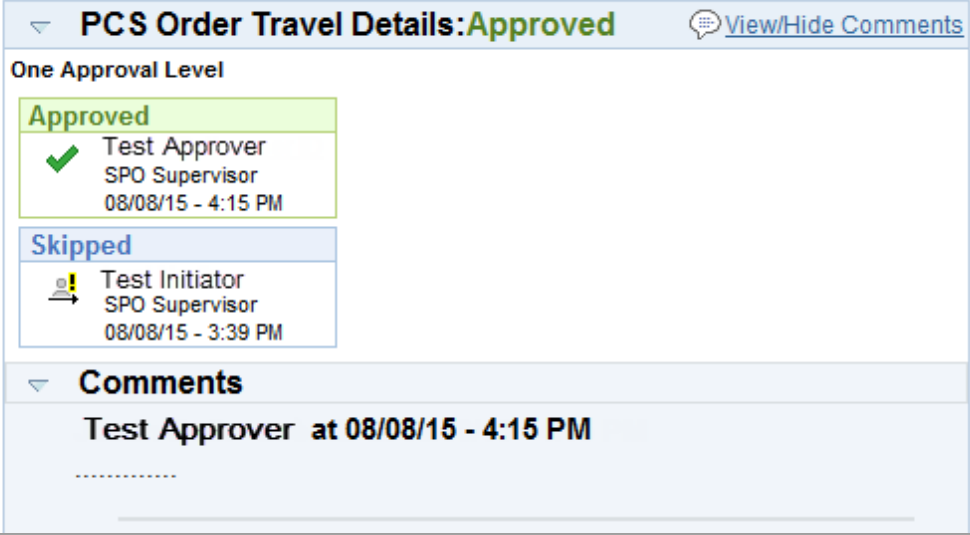
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Procedure   The following steps will show you how to approve PCS order approval requests.

Step	Action
1	Click on the **Requests** tab and select the **View My Requests (all types)** link in the Self Service Requests pagelet. Enterprise Menu navigation: Human Resources > Requests > View My Requests
2	On the View My Action Requests page, select: • **Requests I am Approver For =** Yes • **Transaction Name** = select the type of approval you are approving. For PCS Orders, there are 4 approval types ▸ PCS Order Travel Details ▸ PCS Departing Endorsement ▸ PCS Reporting Endorsement ▸ PCS Multiple Trvl Endorsement To view all approvals, select All Transactions as the Transaction Name. Click the **Populate Grid** button. All approval requests matching the Transaction Name will be listed in the Order Approvals section.
3	In the Order Approvals section, click the **Approve/Deny** link for the order type to be approved. The approval page will display in a new browser tab or window.
4	In the Route for Approval section, enter any comments and click the Approve or Deny

Step	Action
	button.
	For PHS PCS Orders, the Push Back button serves the same function as the Deny button. Push Back is helpful only when there are multiple levels of approvals. PHS does not have multiple level approvals.
	Route for Approval Approval Type: PCS Travel Details Approval User ID: Dept of Approving SPO: Comment: .... [Approve] [Push Back] [Deny]
	As an approver, you must review/audit the order details. Click on the tabs to review the order details. As an approver, these pages will display in read-only mode. PCS Order Notes Funding Approval Audit
5	If the order was approved successfully, a confirmation will display in the PCS Travel Details Approval section. **PCS Travel Details Approval** ▽ **PCS Order Travel Details:Approved** 💬View/Hide Comments **One Approval Level** **Approved** ✔ Test Approver SPO Supervisor 08/08/15 - 4:15 PM **Skipped** 🖻! Test Initiator SPO Supervisor 08/08/15 - 3:39 PM ▽ **Comments** Test Approver at 08/08/15 - 4:15 PM ....
6	Repeat these steps for each order, cancellation, or amendment that was submitted for approvals. If an approval request is denied, the order must be corrected and resubmitted for approval by the initiator.

Step	Action
	❗ When the PCS Reporting Endorsement or PCS Multiple Trvl Endorsement is approved, the member's job data record is updated with the Report details. If a message displays indicating a job data row could not be inserted, you must contact PPC to insert the job data row.
7	If estimated or actual dates were changed when the order type was submitted for approval (or, if actual date does not match the estimated date), the following message will display:

	Message ☒ Warning -- You have changed the Estimated or Actual dates and the Order Begin or End dates will be changed. (30013,48) If you change the Initial depart or the final report estimated or actual dates the related order begin date or the Order end will be adjusted accordingly. OK Cancel

Click the **Ok** button if this message appears.

CANCEL ORDER

Introduction   This section provides procedures for cancelling an order.   Orders can be cancelled during any status: Authorized, Ready, En route, Finished.   However, only approvers can cancel an order in either 'En route' or 'Finished' status which must be submitted for approval.   Orders in 'Authorized' or 'Ready' status can be cancelled by the initiator and do not require an approval.
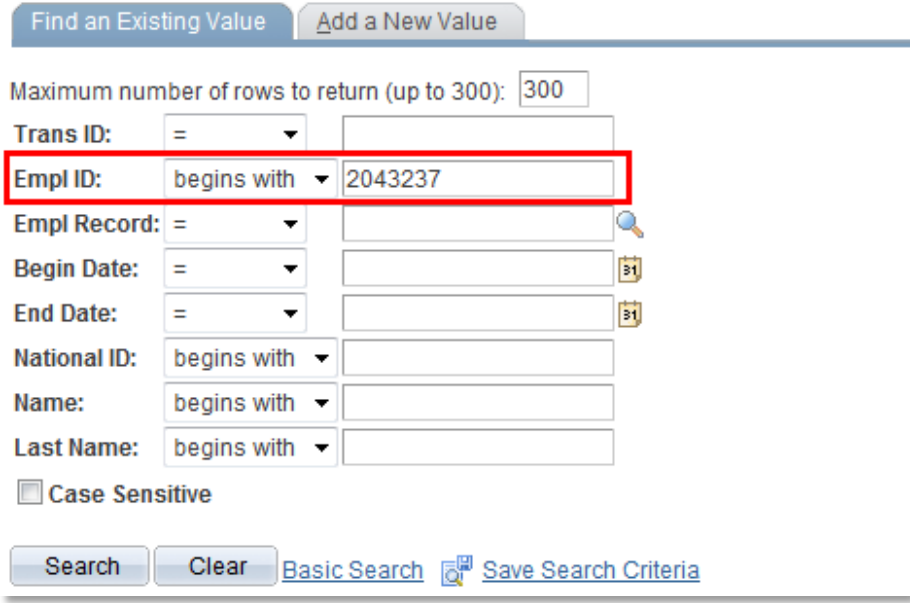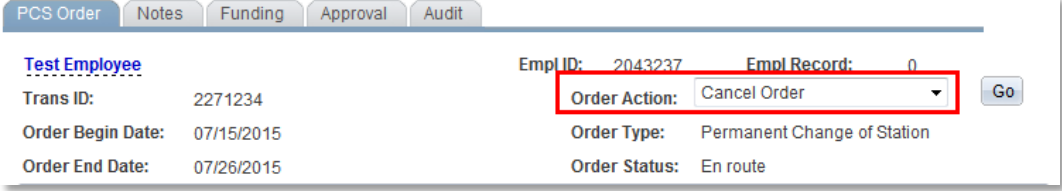
Menu Path(s)   Menu Navigation: Orders > PCS Orders

Portal Pagelet: Orders > PCS Orders

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Procedure   The following steps will show you how to cancel a PCS order.

Step	Action
1	Click the **PCS Orders** link in the Orders portal pagelet. Enterprise Menu navigation: Orders > PCS Orders Orders 🗗 ➖ PCS Orders
2	On the Find an Existing Value search page, enter the member's employee ID in the EmplID field. Find an Existing Value ⎸ Add a New Value Maximum number of rows to return (up to 300): 300 Trans ID: = ▾ Empl ID: begins with ▾ 2043237 Empl Record: = ▾ 🔍 Begin Date: = ▾ 📅 End Date: = ▾ 📅 National ID: begins with ▾ Name: begins with ▾ Last Name: begins with ▾ ☐ Case Sensitive Search Clear Basic Search 🔲 Save Search Criteria Click the **Search** button.
3	In the Order Action field, select **Cancel Order**. Do not select Cancel Order and Tono as this is not a valid action for PHS orders. PCS Order ⎸ Notes ⎸ Funding ⎸ Approval ⎸ Audit **Test Employee** Empl ID: 2043237 Empl Record: 0 Trans ID: 2271234 Order Action: Cancel Order ▾ Go Order Begin Date: 07/15/2015 Order Type: Permanent Change of Station Order End Date: 07/26/2015 Order Status: En route Click the **Go** button. ℹ️ If the order has a pending approval, a message will display indicating that the pending approval must first be resolved.
4	If the order is **En route**, or **Finished** status, the cancellation will require an approval. On the approvals page, enter any comments.

Step	Action
	  Click the **Submit** button. If the order is in **Authorized** or **Ready** status, the cancellation will not require an approval and the order will be cancelled upon Save.
5	The order will be cancelled upon approval (or Save) and the status will automatically update to **Cancelled**.

AMEND ORDER

Introduction   Amending an order is a special process that allows the user to change the order's depart and report information after an order is in 'En route' or 'Finished' status. This can affect the order begin and end dates as well as member pay.   To do this the user must be in 'Amend Mode'.

Amending an order is different from simply editing other data on the order because the fields that become editable are pay impacting and require approval. If the user has appropriate access, they can edit other parts of the order such as notes and travel information without being in 'Amend Mode'.

The following fields can be edited only in Amend Mode when after an order is in 'En route' status:

- Actual Date
- Position
- Department
- Location
- Estimated Date (depart and report rows)

Orders in Authorized and Ready statuses can be edited directly without being in 'Amend Mode'.

Menu Path(s)   Menu Navigation: Orders > PCS Orders

Portal Pagelet: Orders > PCS Orders

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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- 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 amend a PCS Order.

Step	Action
1	Click the **PCS Orders** link in the Orders portal pagelet. Enterprise Menu navigation: Orders > PCS Orders Orders PCS Orders
2	On the Find an Existing Value search page, enter the member's employee ID in the EmplID field. Find an Existing Value Add a New Value Maximum number of rows to return (up to 300): 300 Trans ID: = Empl ID: begins with 2043237 Empl Record: = Begin Date: = End Date: = National ID: begins with Name: begins with Last Name: begins with ☐ Case Sensitive Search Clear Basic Search Save Search Criteria Click the **Search** button.
3	In the Order Action field, select **Amend Order**. Test Employee EmplID: 2043237 Empl Record: 0 Trans ID: 2271238 Order Action: Amend Order Go Order Begin Date: 08/07/2015 Order Type: Permanent Change of Station Order End Date: 08/07/2015 Order Status: Finished Click the **Go** button.
4	The order will display in 'Amend Mode'. The fields that are allowed to be amended are now editable. Make the necessary changes. Test Employee Empl ID: 2043237 Empl Record: 0 Trans ID: 2271238 **Amend Mode** Order Action: Amend Order Go Order Begin Date: 08/07/2015 Order Type: Permanent Change of Station Order End Date: 08/07/2015 Order Status: Finished

Step	Action
5	'Amended' changes must be submitted for approval. To submit an amended order approval, click the Approval Tab. The "Amend Order" approval type will be defaulted. Enter any comments.

Click the **Submit** button.

> The amended data will be saved.   However the order begin/end dates will not be updated and job/payroll integration will not occur until the amended order is approved.   If the amendments are denied, the prior actual dates and location, department and position will be restored to the travel rows.

The amended data will be saved.   However the order begin/end dates will not be updated and job/payroll integration will not occur until the amended order is approved.   If the amendment is denied, the prior actual dates and location, department and position will be restored to the travel rows

Upon approval, the system will update the order Begin and End Dates based on the Actual Dates, recalculate the duration, term and eligibility of the order, and update the member's Job record and payroll eligibility.   It is possible that Amendments may make an order non-compliant due to date and duration changes.   In this case, the order will not be allowed to proceed until the compliance is remedied.

> To exit Amend Mode without submitting for approval, simply exit the page.

> An order will stay in AMEND MODE until it is approved, denied or withdrawn.

PRINT ORDER

Introduction   This section provides procedures for printing an order.   To print an order, the Direct Access website must be allowed to bypass pop-up blocker.
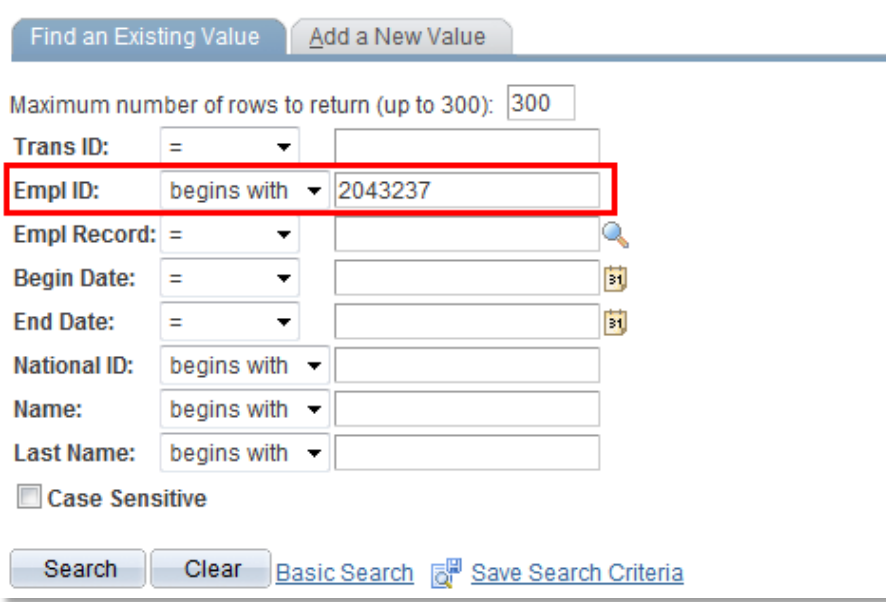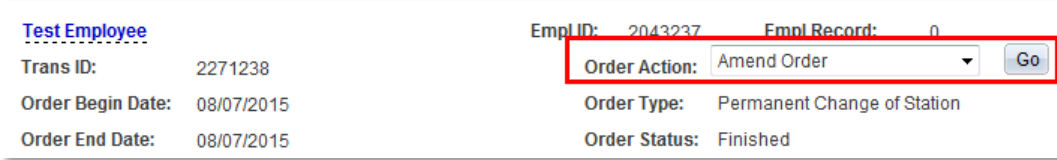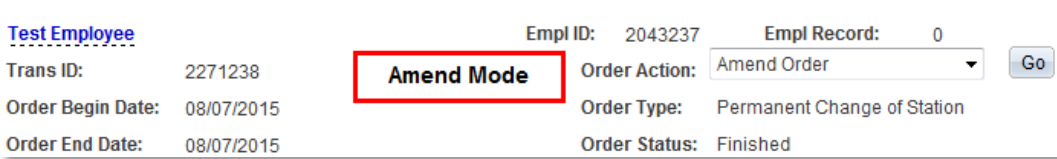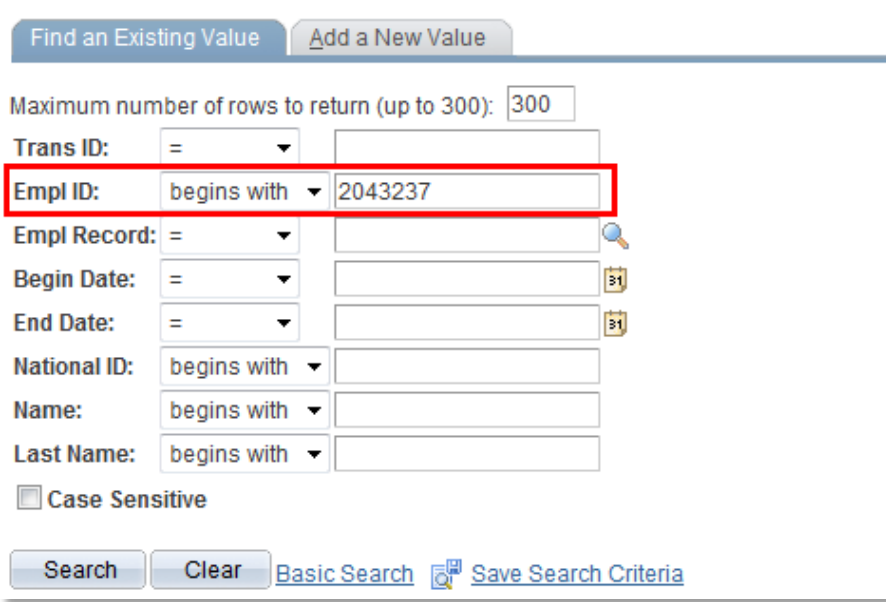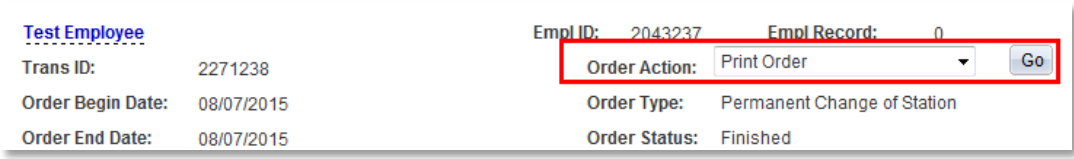
Menu Path(s)   Menu Navigation: Orders > PCS Orders

Portal Pagelet: Orders > PCS Orders

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- 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 print an order.

Step	Action
1	Click the **PCS Orders** link in the Orders portal pagelet. Enterprise Menu navigation: Orders > PCS Orders
2	On the Find an Existing Value search page, enter the member's employee ID in the EmplID field. Click the **Search** button.
3	In the Order Action field, select **Print Order**. Click the **Go** button. If no pop-up blocker message displays, proceed to the next step. If a pop-up blocker message displays select 'Allow Once' or 'Options for this site' to allow the PDF to display. This will reset the page and steps 2-3 must be repeated.
4	After clicking the Go button, a Windows message will display. Select the appropriate

Step	Action
	option. If 'Open' is selected, the PDF will display in a new window.

Do you want to open or save **1NVAXS05RGDEKETUW39Q_CG_RSV_ORDER.pdf** (4.18 KB) from [   ] ?   ✕

[Open] [Save] [▼]   [Cancel]

UPDATE CAN INFORMATION

Introduction   This section provides procedures for adding a Central Accounting Numbers (CANs) for a transfer.

The effective date for a transfer-related CAN update should match the actual date that was indicated for the Depart travel type.

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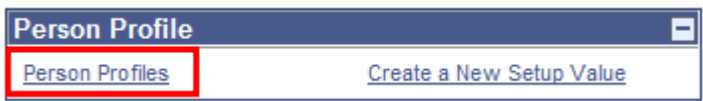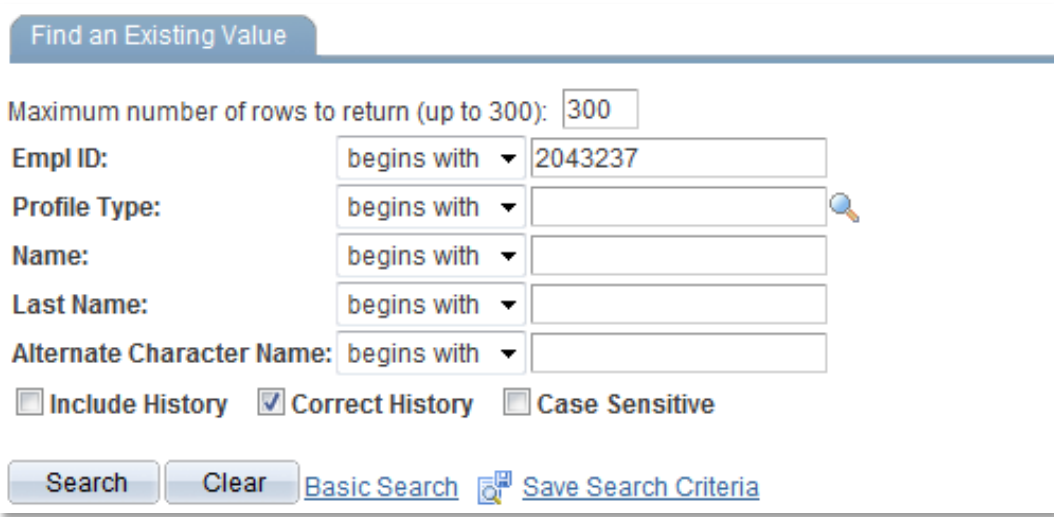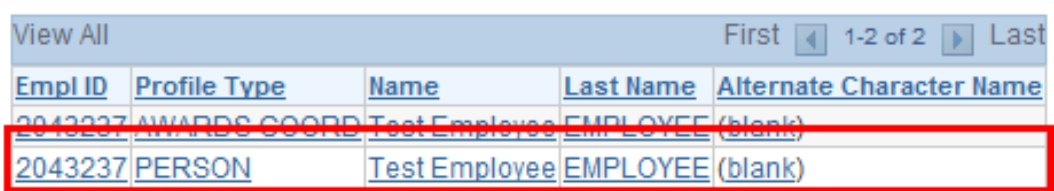
Portal Pagelet: Person Profiles > Person Profiles

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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- 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/modify CAN data for a PHS officer.   All fields with an asterisk (*) are required fields.

Step	Action
1	Click the **Person Profiles** link in the Person Profiles portal pagelet. Enterprise Menu navigation: Workforce Development > Profile Management > Profiles > Person **Person Profile** Person Profiles Create a New Setup Value
2	On the Person Profiles search page, enter the member's employee ID in the EmplID field. Find an Existing Value Maximum number of rows to return (up to 300): 300 Empl ID: begins with ▾ 2043237 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 Click the **Search** button.
3	In the search results, select the **PERSON** row. View All First ◀ 1-2 of 2 ▶ Last Empl ID	Profile Type	Name	Last Name	Alternate Character Name 2043237 AWARDS COORD Test Employee EMPLOYEE (blank) 2043237 PERSON Test Employee EMPLOYEE (blank)
4	On the Person Profile page, select the **CAN** tab and then select the **Add New CAN** link. Competencies Qualifications Education Mobility Waivers CAN ▾ CAN Customize | Find | View All | First 1 of 1 Last ID | Type | Content Type | *Effective Date | CAN (8 characters) CAN | Central Accounting Number | PHS_CAN | 08/08/2015 | 12345678 ➕ Add New CAN
5	On the Add New CAN page, select/enter: ▪ **Effective Date** = this date should match the actual depart date for the order ▪ **Type** = 'CAN'

Step	Action
	▪ **CAN =** enter the CAN number Enter appropriate data in the remaining fields which are optional. **Details** Find | View All First ◄ 1 of 1 ► Last *Effective Date: 07/15/2015 Type: CAN Central Accounting Number *CAN (PAY) #: 12345678 Agency: Acct. Pt. (PAY) #: DA/Timekeeper #: Click the **Ok** button.
6	On the Person Profile page, click the **Save** button. Competencies Qualifications Education Mobility Waivers CAN ▼ CAN Customize | Find | View All | First ◄ 1 of 1 ► Last ID | Type | Content Type | *Effective Date | CAN (PAY) # CAN | Central Accounting Number | PHS_CAN | 07/15/2015 | 12345678 ➕ Add New CAN Save

UPDATE BUSINESS ADDRESS

Introduction   This section provides procedures for updating a business address for a PCS order. Business address is needed for BAH entitlement.

Menu Path(s) Menu Navigation: Workforce Administration > Personal Information > Modify a Person
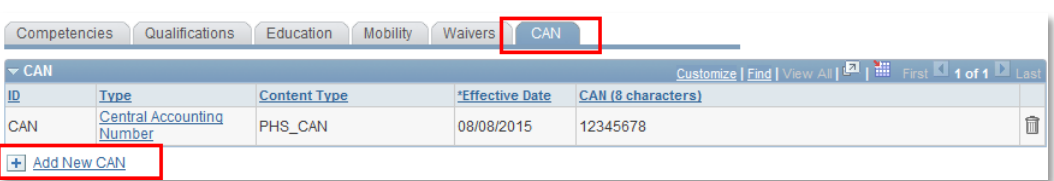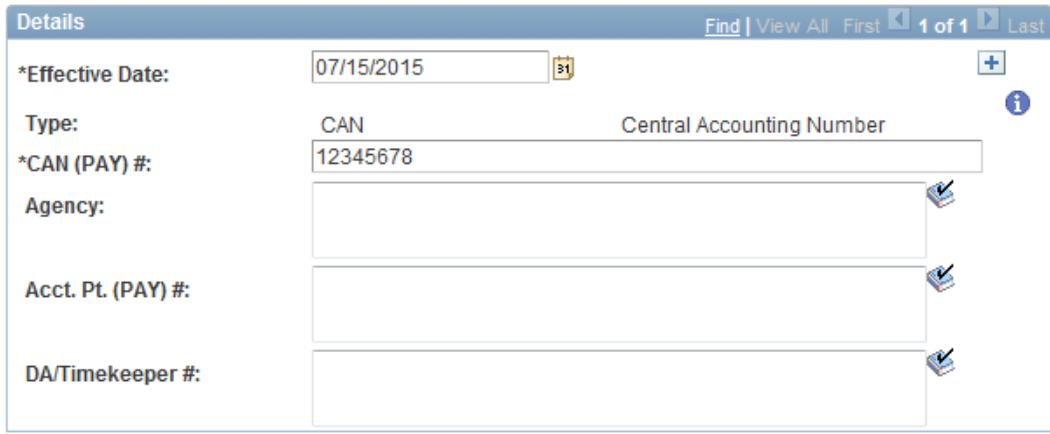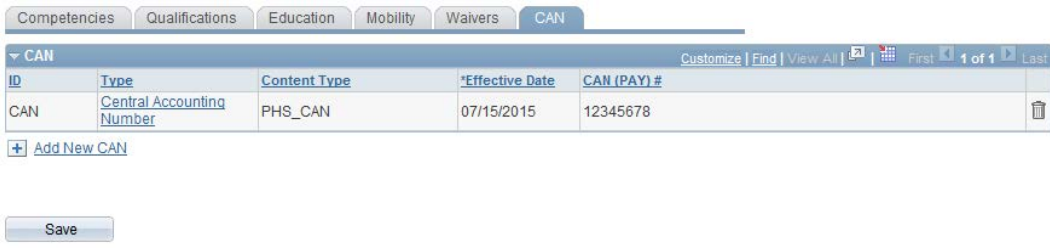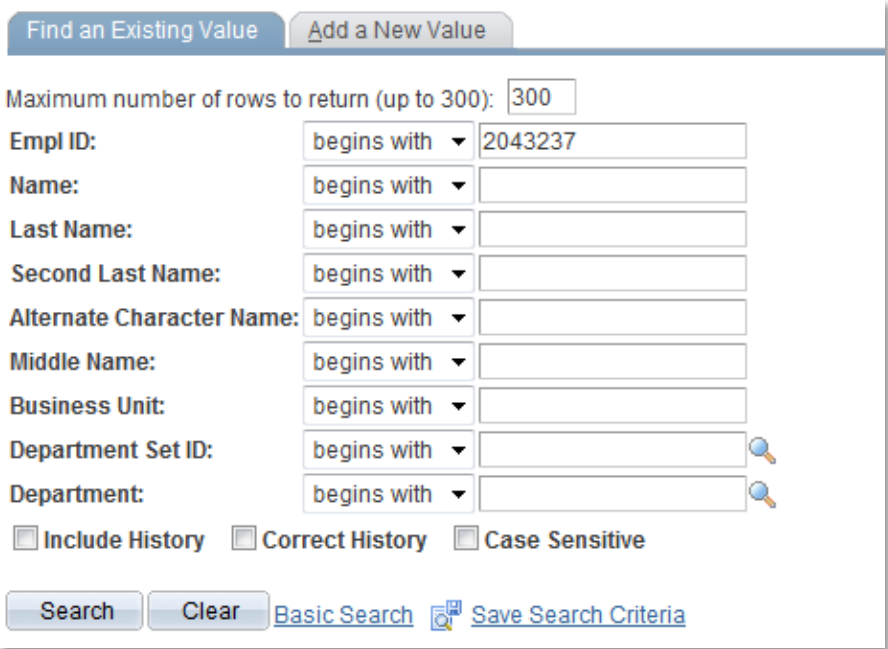
Portal Pagelet: Core HR > Personal Data
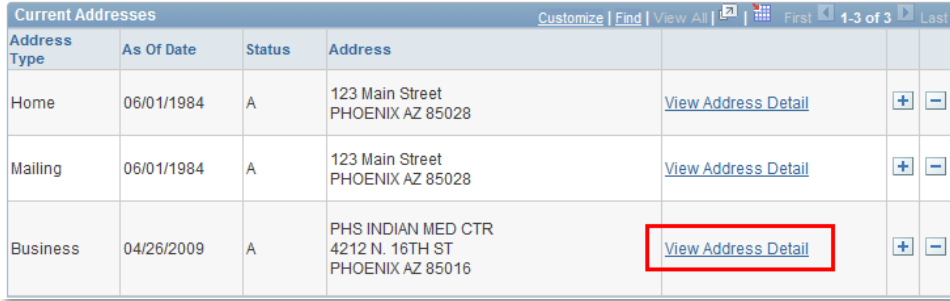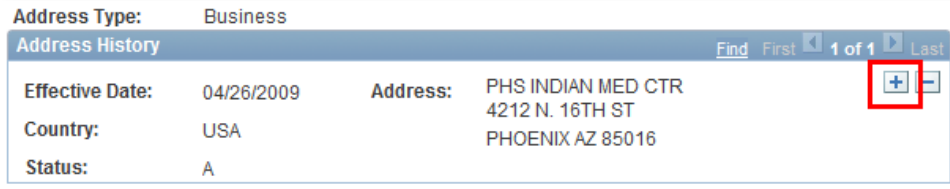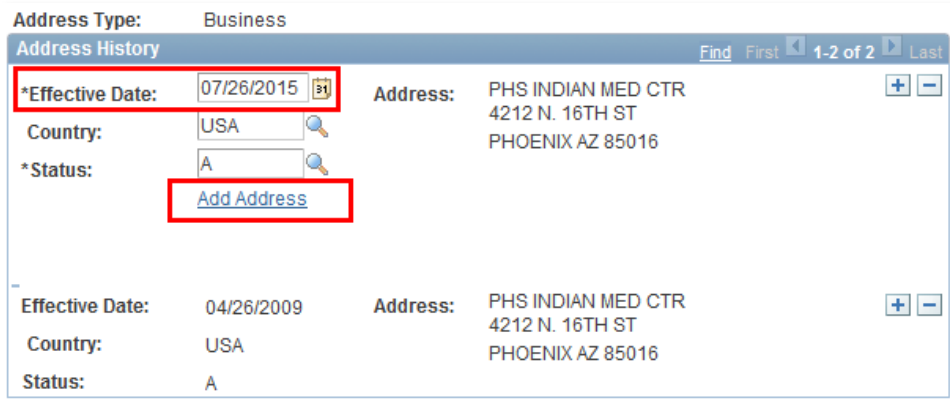
Need Help?   If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- 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 update a member's business address.   All fields with an asterisk (*) are required fields.

Step	Action
1	Click the **Personal Data** link in the **Core HR** portal pagelet. Enterprise Menu navigation: Workforce Administration > Personal Information > Modify a Person **Core HR** Person Profiles Personal Data
2	On the Find an Existing Value search page, enter the members employee ID in the EmplID field. Find an Existing Value Add a New Value Maximum number of rows to return (up to 300): 300 Empl ID: begins with 2043237 Name: begins with Last Name: begins with Second Last Name: begins with Alternate Character Name: begins with Middle Name: begins with Business Unit: begins with Department Set ID: begins with Department: begins with ☐ Include History ☐ Correct History ☐ Case Sensitive Search Clear Basic Search Save Search Criteria Click the **Search** button.
3	Click the Contact Information tab. Biographical Details Contact Information Test Employee Person ID: 2043237 Name Find	View All First 1 of 1 Last Effective Date: 06/01/1984
4	In the Current Addresses section, click the **View Address Detail** link for the **Business** Address Type. If there is not an existing Business address, skip to Step 9.

Step	Action

| 5 | On the Address History page, click the **+** icon. |

| 6 | In the new row, enter the **Effective Date**.   This date should match the actual Report date on the order. |

Click the **Add Address** link.

| 7 | On the Edit Address page, update the address. |

Step	Action
	Click the **Ok** button. Click the **Ok** button again on the Address History page.
8	On the Contact Information page, the new business address is now displayed. Click the **Save** button.
9	If business address is missing, click the + icon to insert a new row. In the new row, select the **Business** Address Type and click **Add Address Detail** link. On the Address History page, enter the **Effective Date**. This date should match the actual Report date on the order. Enter the country and click the **Add Address**.

Step	Action

On the **Edit Address** page enter the business address then click the Ok button.   Click Ok again on the Address History page.

On the Contact Information page, the new business address is now displayed.

Click the **Save** button.

ADD/UPDATE CONTRACT CLAUSE

Introduction   This section provides procedures for adding/updating a contract clause in the contract clause table to be used in a PCS Order or the New Hire Report.
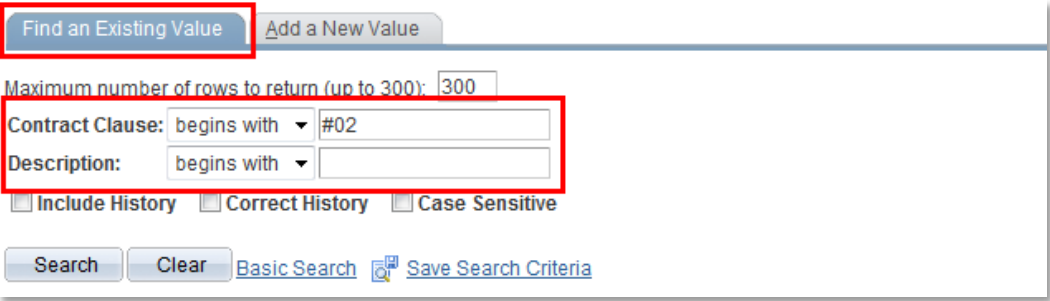
Menu Path(s)   Menu Navigation: Orders > Setup > Contract Clauses

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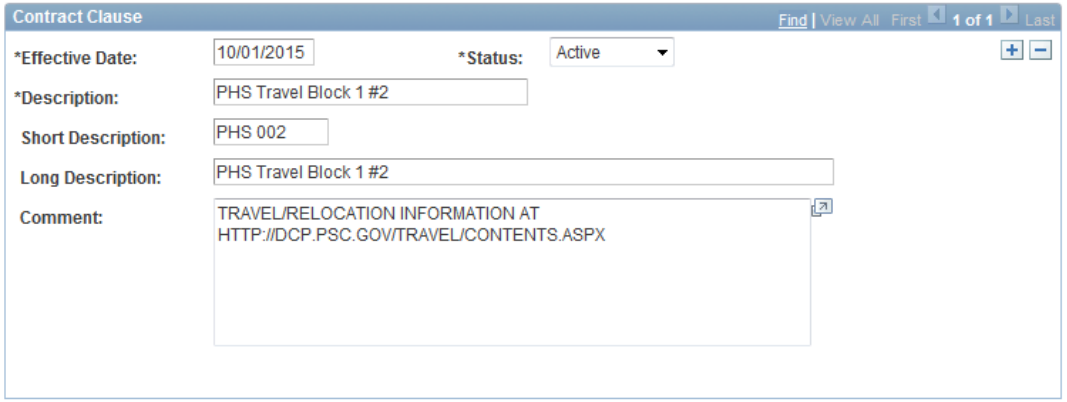
Need Help?   If you do not know what data to enter/select for a certain field or have any questions regarding Direct Access, contact PPC Customer Care:

- 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 contract clauses

Step	Action
1	Click the **Contract Clauses** link in the **Orders** portal pagelet. Enterprise Menu navigation: Orders > Setup > Contract Clauses **Orders** PCS Orders Contract Clauses
2	To **update an existing contract clause**, enter the contract clause ID and/or description on the **Find an Existing** Value page. Click the Correct History checkbox if you are correcting an existing contract clause. Then, click the **Search** button. Find an Existing Value | Add a New Value Maximum number of rows to return (up to 300): 300 Contract Clause: begins with ▾ #02 Description: begins with ▾ ☐ Include History ☐ Correct History ☐ Case Sensitive Search Clear Basic Search Save Search Criteria To **add a new contract clause**, click on the **Add a New Value tab** and enter a Contract Clause ID. This ID must be unique. Then, click the **Add** button. Find an Existing Value | Add a New Value Contract Clause: AA Add
3	On the Contract Clause page, enter the contract clause data. If you are updating an existing contract clause and wish to retain history, click the '+' icon to insert a new row and then make your updates. If you are in correction mode, you can make updates to the existing data without inserting a row. However, this will not retain history. Enter/select the following: ▪ **Effective Date** = Enter when the contract clause should take effect. This date should be before the job data effdt for anyone who will be using this contract clause. For example, if you added a new contract clause with an effective date of 1/1/16 and want to use this contract clause for the new hire order, the member's job data effdt must be after 1/1/16. If it is before, the contract clause will not be selectable. ▪ **Description** = Enter contract clause description ▪ **Short Description** = Enter short description. If left blank, the description will

Step	Action
	default (but truncated if it exceeds 10 characters. ▪ **Long Description** = Enter long description ▪ **Comment** = Enter contract clause text. This is the text that will display on the PCS Order or New Hire Order.
4	Click the **Save** button.

RUN TRANSFER REPORT

Introduction   This section provides procedures for running the PHS Transfer Report.
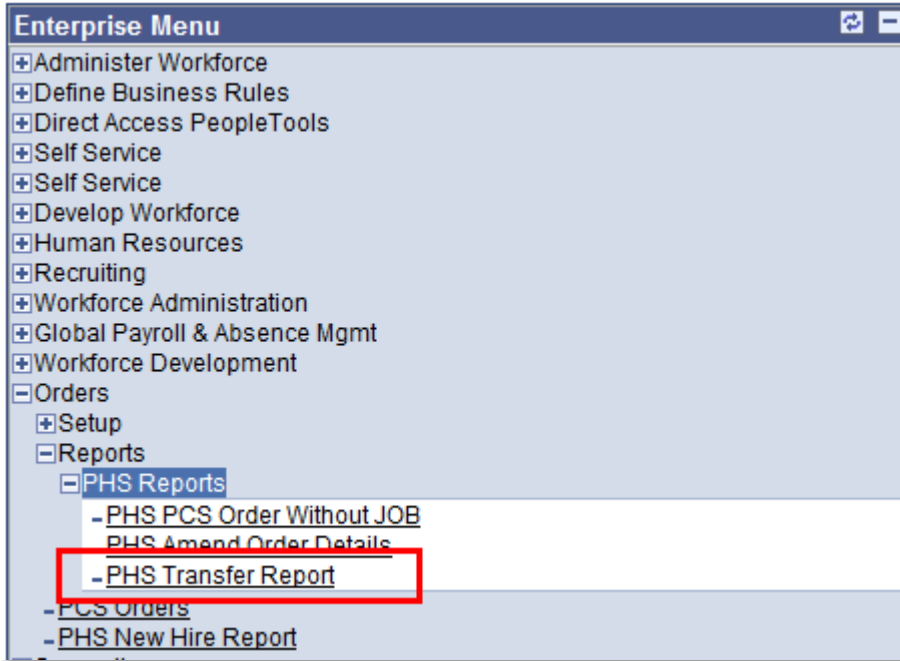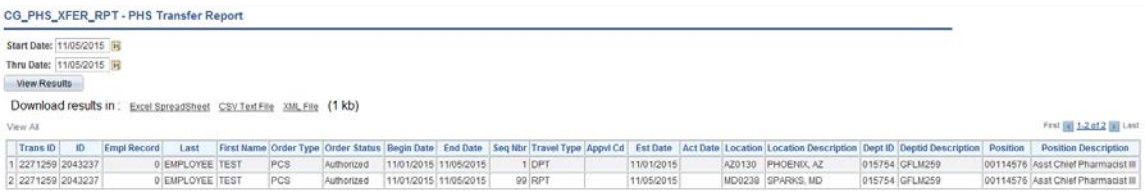
Menu Path(s)   Menu Navigation: Orders > Reports > PHS Reports > PHS Transfer Report

Portal Pagelet: N/A

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

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

Procedure   The following steps will show you how execute the PHS Transfer Report.

Step	Action
1	In the Enterprise Menu, navigate to: Orders > Reports > PHS Reports > PHS Transfer Report
2	On the report criteria page, enter a date range in the Start Date and Thru Date fields. Any members who have either an order begin date or end date that falls within this range will display in the report. If the Report row is fully completed, meaning, the department, location, and position number are populated, the report will display two rows for the member: Depart row and Report row. See **Appendix A** for more information regarding how Order Begin and End Dates are set.

APPENDIX A – UNDERSTANDING ORDER DATES FOR THE TRANSFER REPORT

When an order is created, the dates you designate as the Begin Date and End Date on the Add a New Value page default as the Estimated Depart and Report Dates and as the Order Begin and End Dates. If the Estimated Dates are changed for the Depart and/or Report row, the Order Begin/End Dates will change accordingly.

The Order Begin/End Dates will change as the order is processed.   When the Actual Date for the Depart row or Report row is approved, this then becomes the Order Begin Date.

The PHS Transfer report will display any order that has either the Order Begin Date or Order End Date that falls within the date range.

CG_PHS_XFER_RPT - PHS Transfer Report

Start Date: 11/03/2015

Thru Date: 11/03/2015

[View Results]

***The Order Begin Date from the order above falls within the Start and Thru Date range of the report. As a result, the order was displayed in the report.**

Download results in : Excel SpreadSheet   CSV Text File   XML File   (1 kb)

View All

First   1-2 of 2   Last

	Trans ID	ID	Empl Record	Last	First Name	Order Type	Order Status	Begin Date	End Date	Seq Nbr	Travel Type	Appvl Cd	Est Date	Act Date	Location	Location Description	Dept ID	Deptid Description	Position	Position Description
1	2271259	2043237	0	EMPLOYEE	TEST	PCS	En route	11/03/2015	11/05/2015	1	DPT	Approved	11/01/2015	11/03/2015	AZ0130	PHOENIX, AZ	015754	GFLM259	00114576	Asst Chief Pharmacist III
2	2271259	2043237	0	EMPLOYEE	TEST	PCS	En route	11/03/2015	11/05/2015	99	RPT		11/05/2015		MD0238	SPARKS, MD	015754	GFLM259	00114576	Asst Chief Pharmacist III

CG_PHS_XFER_RPT - PHS Transfer Report

Start Date: 11/04/2015

Thru Date: 11/05/2015

[View Results]

***The Order End Date from the order above falls within the Start and Thru Date range of the report. As a result, the order was displayed in the report.**

Download results in : Excel SpreadSheet   CSV Text File   XML File   (1 kb)

View All

First   1-2 of 2   Last

	Trans ID	ID	Empl Record	Last	First Name	Order Type	Order Status	Begin Date	End Date	Seq Nbr	Travel Type	Appvl Cd	Est Date	Act Date	Location	Location Description	Dept ID	Deptid Description	Position	Position Description
1	2271259	2043237	0	EMPLOYEE	TEST	PCS	En route	11/03/2015	11/05/2015	1	DPT	Approved	11/01/2015	11/03/2015	AZ0130	PHOENIX, AZ	015754	GFLM259	00114576	Asst Chief Pharmacist III
2	2271259	2043237	0	EMPLOYEE	TEST	PCS	En route	11/03/2015	11/05/2015	99	RPT		11/05/2015		MD0238	SPARKS, MD	015754	GFLM259	00114576	Asst Chief Pharmacist III

CG_PHS_XFER_RPT - PHS Transfer Report

Start Date: 11/02/2015

Thru Date: 11/05/2015

[View Results]

***Both the Order Begin Date and Order End Date from the order above fall within the Start and Thru Date range of the report. As a result, the order was displayed in the report.**

Download results in : Excel SpreadSheet   CSV Text File   XML File   (1 kb)

View All

First   1-2 of 2   Last

	Trans ID	ID	Empl Record	Last	First Name	Order Type	Order Status	Begin Date	End Date	Seq Nbr	Travel Type	Appvl Cd	Est Date	Act Date	Location	Location Description	Dept ID	Deptid Description	Position	Position Description
1	2271259	2043237	0	EMPLOYEE	TEST	PCS	En route	11/03/2015	11/05/2015	1	DPT	Approved	11/01/2015	11/03/2015	AZ0130	PHOENIX, AZ	015754	GFLM259	00114576	Asst Chief Pharmacist III
2	2271259	2043237	0	EMPLOYEE	TEST	PCS	En route	11/03/2015	11/05/2015	99	RPT		11/05/2015		MD0238	SPARKS, MD	015754	GFLM259	00114576	Asst Chief Pharmacist III