

OCS – Hire to IRR Overview

Introduction

This guide provides the procedures for accessing a member into Officer Candidate School (OCS). The member must be hired into the Individual Ready Reserve (IRR) before the member's orders can be entered.

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Important Information

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

Important Information Regarding Employee Records

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

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

Personal Information

- Job Data
- Dependent Information
- Search by SSN
- Email Address
- Find an Employee
- Add Employment Instance**

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

Biographical Details | Contact Information | Regional | **Organizational Relationships**

Test3 Duplicates Person ID 1234567

Choose Org Relationship to Add

☒ Employee
☐ Contingent Worker
☐ Person of Interest

Empl Record 0

Select Checklist Code [v] ⓘ

Add Relationship

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

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

Search Applicants

- Hire Applicant
- Add a Person**

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

Biographical Details | Contact Information | **Regional**

Test3 Duplicates Person ID 1234567

Name [v] 1 of 1 View All



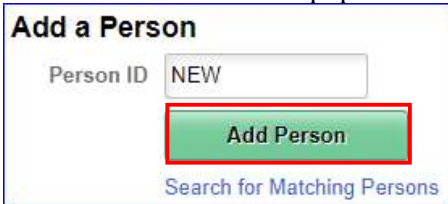
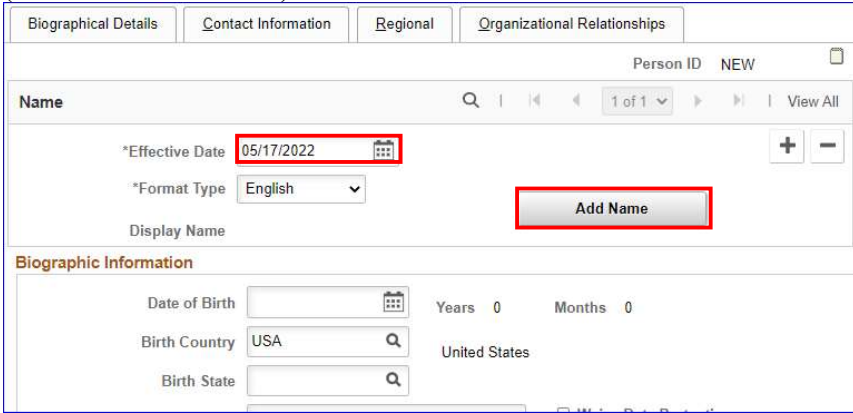
Effective Date 06/16/2022
 Format Type English

View Name

Accessing the Member into Direct Access

Introduction This section provides the procedures for accessing the member into Direct Access (DA).

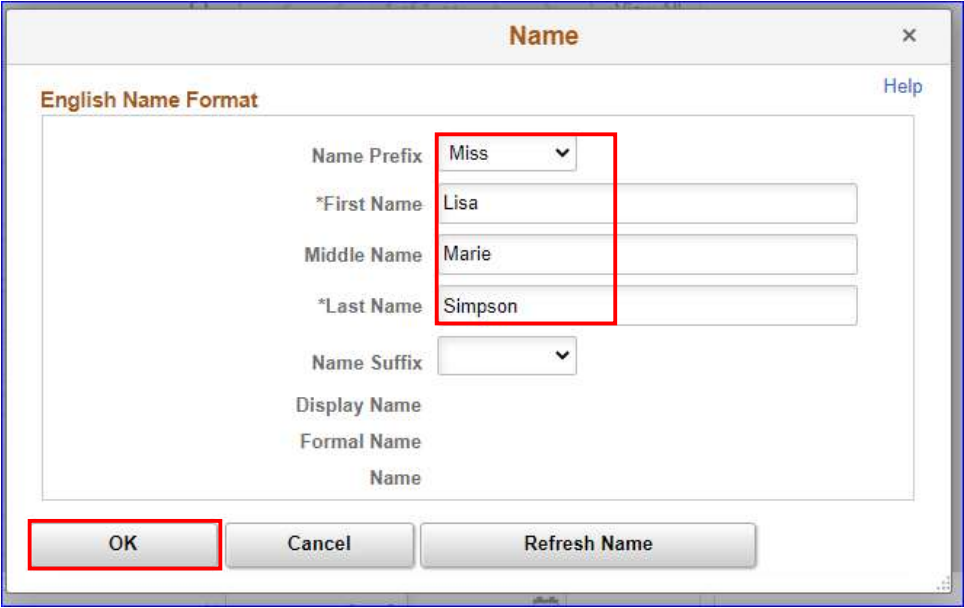
Procedure See below.

Step	Action
1	Click on the Accessions tile. 
1.5	Select the Add a Person option. 
2	The Person ID field auto-populates with NEW. Click Add Person . 
3	The Effective Date will default to the current date. Enter the appropriate date (cannot be future dated). Click Add Name . 

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Accessing the Member into Direct Access, Continued

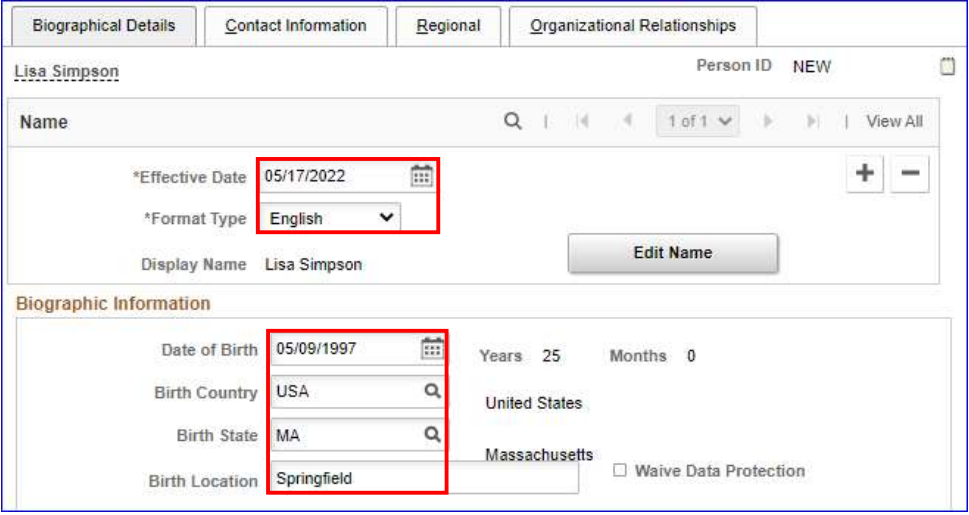
Procedure,
continued

Step	Action
4	<p>Enter the member's complete Name including full middle name. When complete, click OK.</p> <p>NOTE: Do not use NMN for members with "No Middle Name". The government travel card will be issued with a middle name of "N" and cause denial of its use for the member. LEAVE IT BLANK.</p> 

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

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

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Accessing the Member into Direct Access, Continued

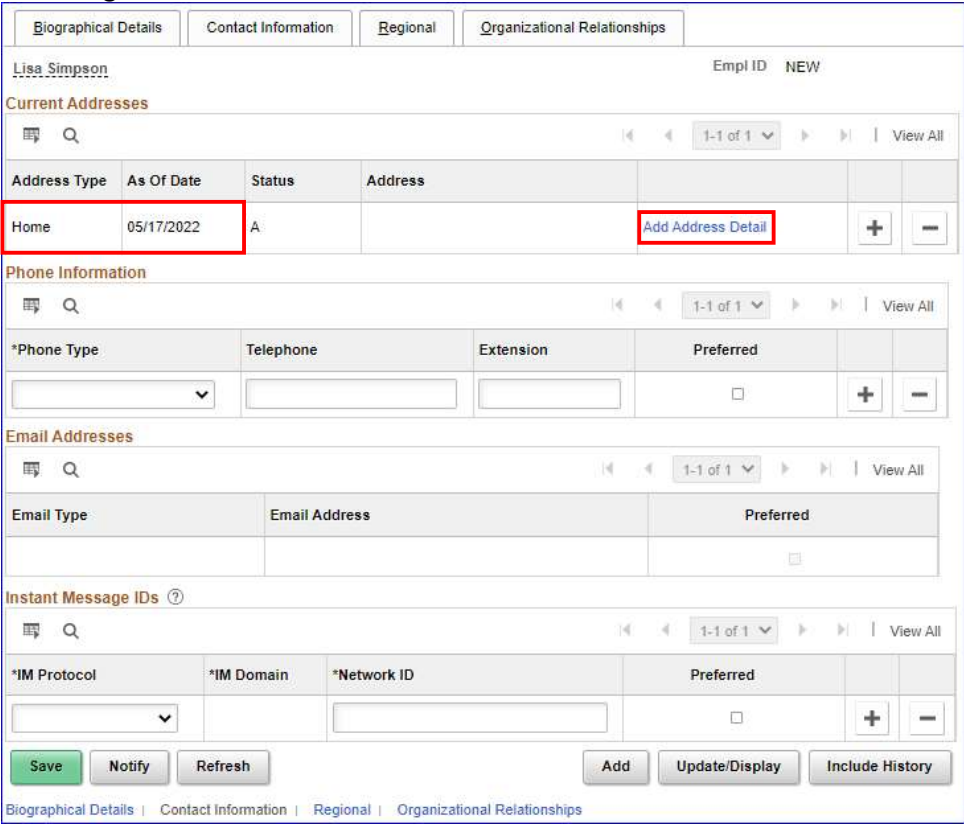
Procedure,
continued

Step	Action												
5.5	<p>Biographical History section:</p> <ul style="list-style-type: none">• Effective Date – Must match the Effective Date above.• Gender – Not editable.• Highest Education Level – Select the education level from the drop-down.• Marital Status and As of – Select the status from the drop-down and enter the date of marriage (if applicable).• Language Code – Select English from the drop-down.• Alternate ID/Waive Data Protection & Full-Time Student – DO NOT USE.• National ID – Enter the member’s Social Security Number (with hyphens).• Primary ID – Is automatically checked. <div><div><div>Biographical History</div><div><div><div><div>*Effective Date</div><div>05/17/2022</div><div></div></div><div><div>Gender</div><div>Unknown</div><div></div></div><div><div>*Highest Education Level</div><div>G-Bachelor's Level Degree</div><div></div></div><div><div>*Marital Status</div><div>Single</div><div></div></div><div><div>Language Code</div><div>English</div><div></div></div><div><div>Alternate ID</div><div><div><div><div></div><div>Full-Time Student</div></div><div></div></div></div></div><div><div>1 of 1</div><div></div><div></div><div>View All</div></div></div></div><div><div><div>▼ National ID</div><div><div></div><div></div><div><div>1-1 of 1</div><div></div><div></div><div>View All</div></div></div></div><table><thead><tr><th>*Country</th><th>*National ID Type</th><th>National ID</th><th>Primary ID</th><th></th><th></th></tr></thead><tbody><tr><td>USA</td><td>Social Security Number</td><td>123-45-6789</td><td><input checked="" type="checkbox"/></td><td></td><td></td></tr></tbody></table><div><div>Save</div><div>Notify</div><div>Refresh</div><div>Add</div><div>Update/Display</div><div>Include History</div></div></div></div></div>	*Country	*National ID Type	National ID	Primary ID			USA	Social Security Number	123-45-6789	<input checked="" type="checkbox"/>		
*Country	*National ID Type	National ID	Primary ID										
USA	Social Security Number	123-45-6789	<input checked="" type="checkbox"/>										
6	<p>Select the Contact Information tab.</p> <div><div>Biographical Details</div><div>Contact Information</div><div>Regional</div><div>Organizational Relationships</div></div> <div>Person ID</div>												

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Accessing the Member into Direct Access, Continued

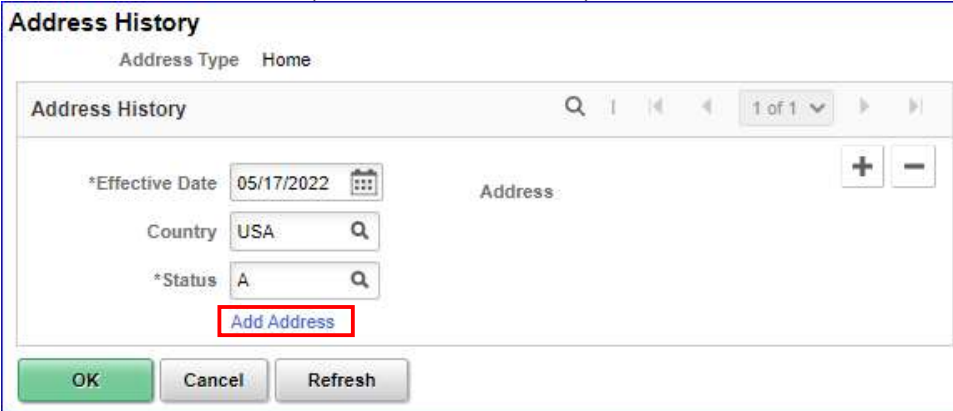
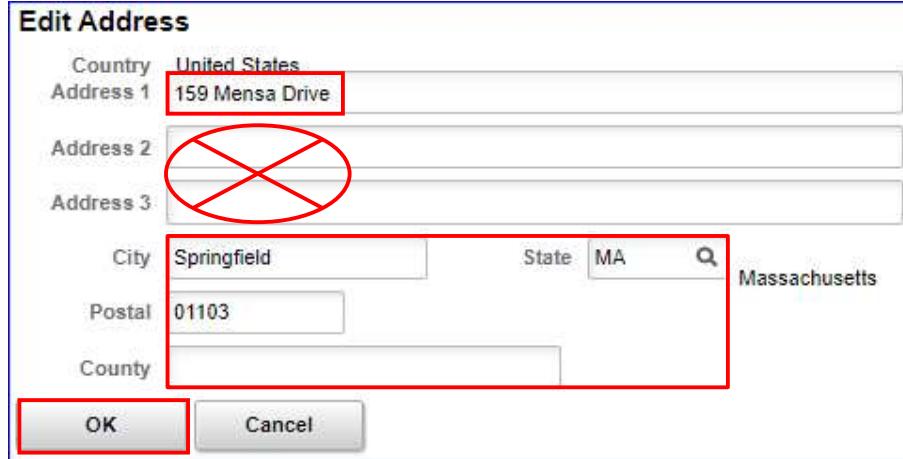
Procedure,
continued

Step	Action
7	<p>DA defaults the first Address Type to Home and the As Of Date is the date of hire. Click the Add Address Detail link.</p> <p>NOTE: Required Address Types must include:</p> <ul style="list-style-type: none"> • Thrift Savings Plan (TSP) address • Home of record address • Mailing Address  <p>The screenshot shows the Direct Access interface for a member named Lisa Simpson. The 'Current Addresses' section is highlighted, showing a table with one row: Home, 05/17/2022, A. The 'Add Address Detail' link is highlighted in red. Below are sections for Phone Information, Email Addresses, and Instant Message IDs.</p>

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Accessing the Member into Direct Access, Continued

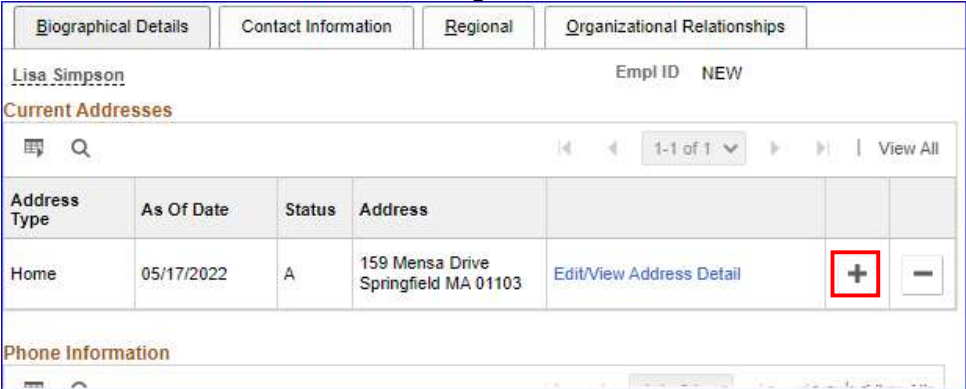
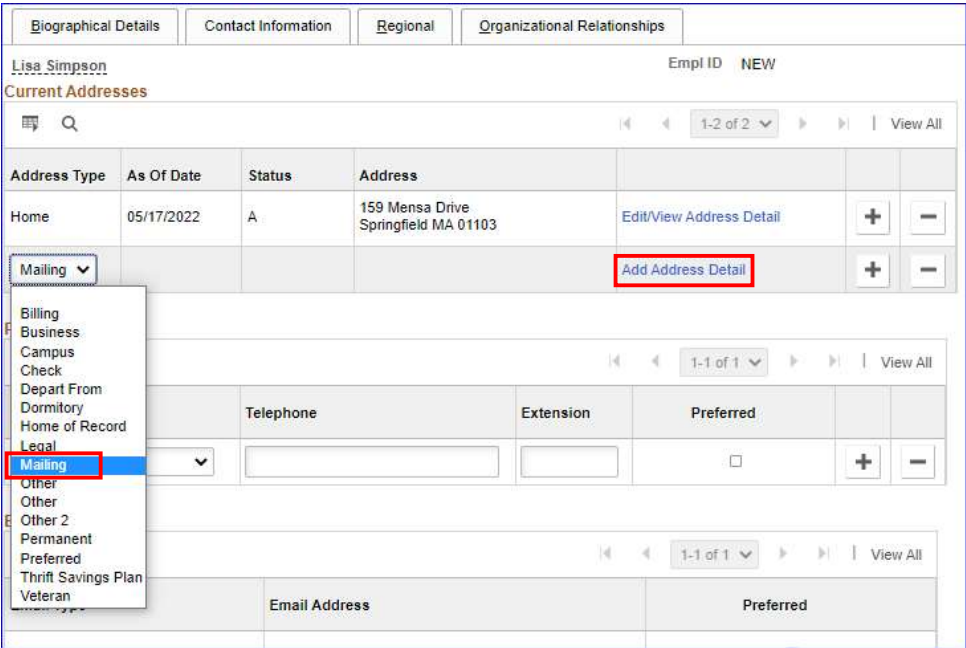
Procedure,
continued

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

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Accessing the Member into Direct Access, Continued

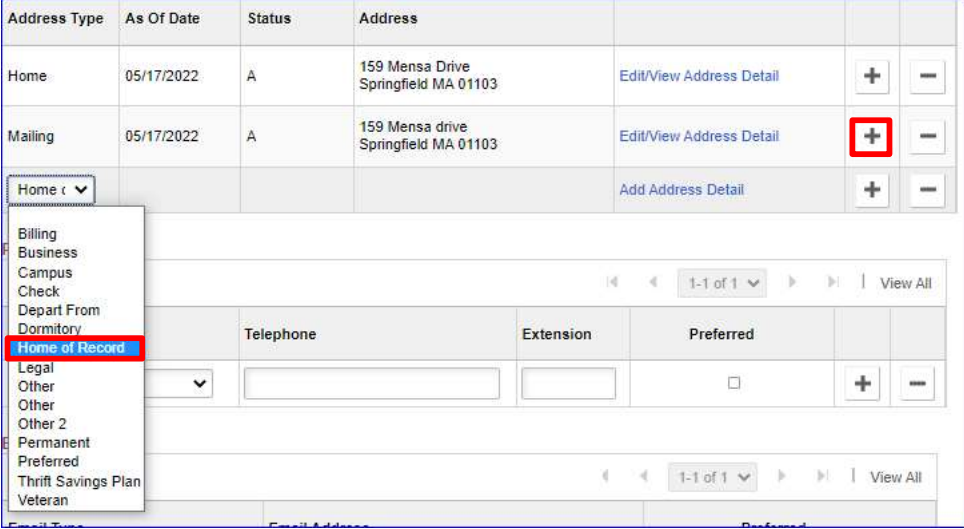
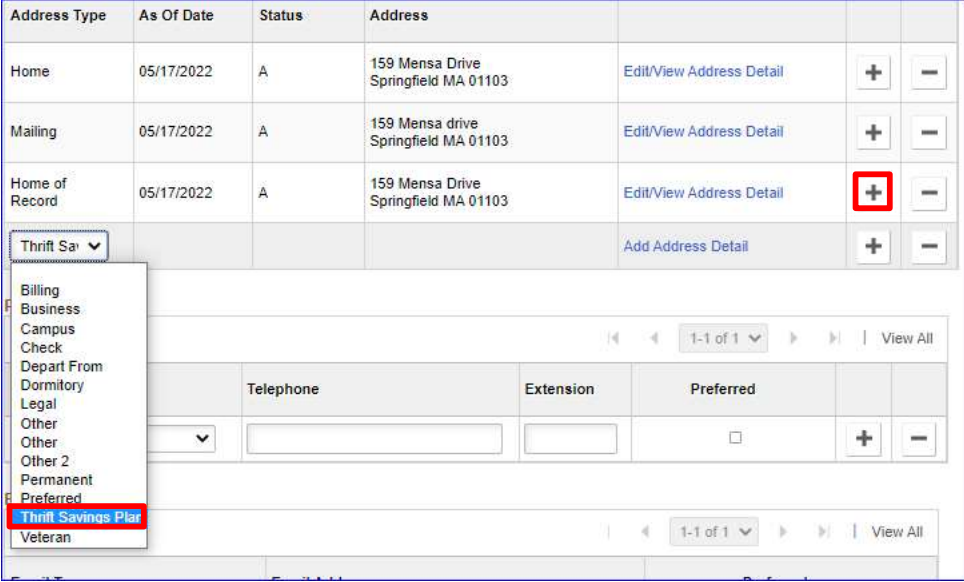
Procedure,
continued

Step	Action
10	<p>Click the Plus button to add the Mailing Address.</p> 
11	<p>Select Mailing from the Address Type drop-down and click the Add Address Detail link.</p> 

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Accessing the Member into Direct Access, Continued

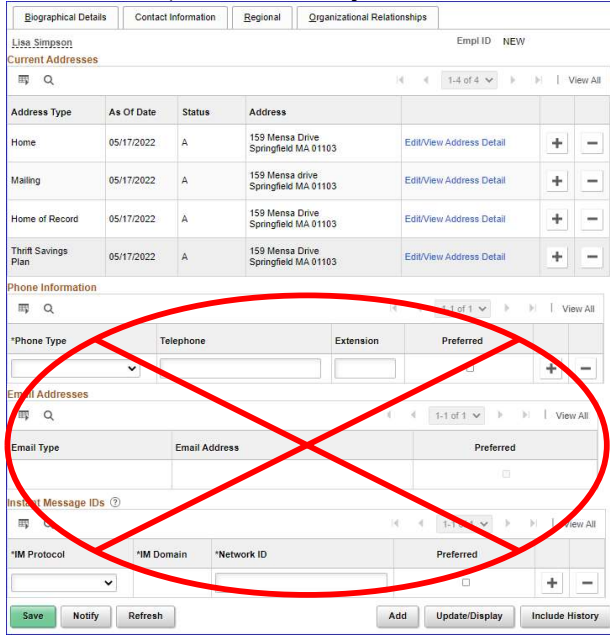

Procedure,
continued

Step	Action
12	<p>Click the Plus button and repeat steps 8 - 10 to enter the Home of Record as identified on the DD4.</p>  <p>The screenshot shows a table with columns: Address Type, As Of Date, Status, Address, Edit/View Address Detail, and action buttons (+/-). The 'Mailing' row is highlighted, and its '+' button is circled in red. The 'Address Type' dropdown is open, showing 'Home of Record' selected. Below the table, there are fields for Telephone, Extension, and Preferred, each with a '+' button.</p>
13	<p>Click the Plus button and repeat steps 8 – 10 to enter the Thrift Savings Plan from the Address Type drop-down.</p>  <p>The screenshot shows the same table as in Step 12, but now the 'Home of Record' row is highlighted, and its '+' button is circled in red. The 'Address Type' dropdown is open, showing 'Thrift Savings Plan' selected. Below the table, there are fields for Telephone, Extension, and Preferred, each with a '+' button.</p>

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Accessing the Member into Direct Access, Continued

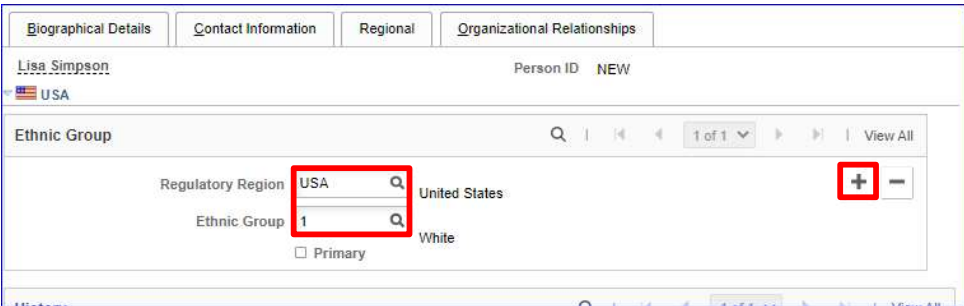
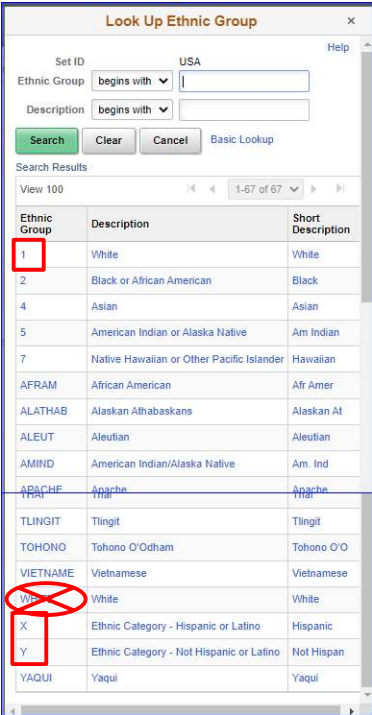
Procedure,
continued

Step	Action
14	<p>The Phone Information, Email Addresses and Instant Message IDs should be left blank (to be entered by the member at a future date).</p> 
15	<p>Select the Regional tab.</p> 

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

Step	Action
16	<p>Ensure the Regulatory Region is USA. Click the lookup icon to select the appropriate Ethnic Group category (If the member claims more than one ethnic group, click the Plus button and add the additional group designation).</p> <p>All other fields on this tab are left blank.</p>   <p>***Do not use the WHITE link for the Ethnic Group, always select the 1 link (per the programmers). Must select the X or Y link for the Hispanic Ethnic Category.</p>

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Accessing the Member into Direct Access, Continued

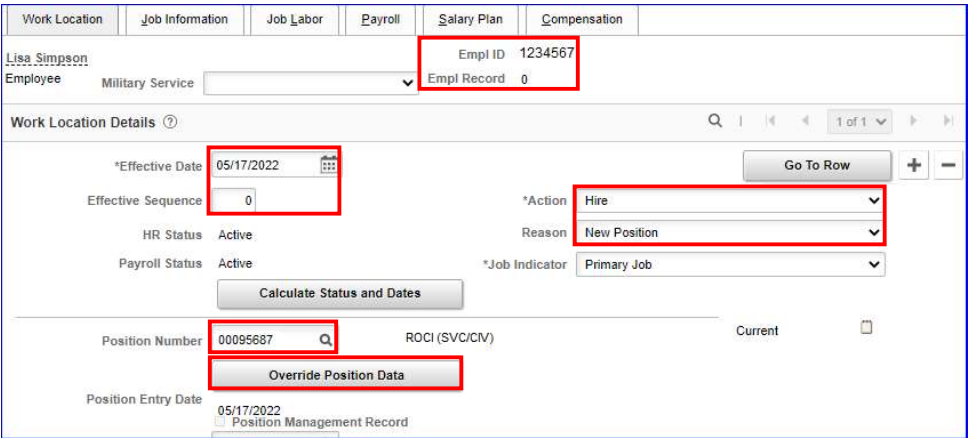
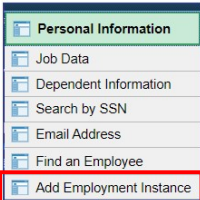
Procedure,
continued

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

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Accessing the Member into Direct Access, Continued

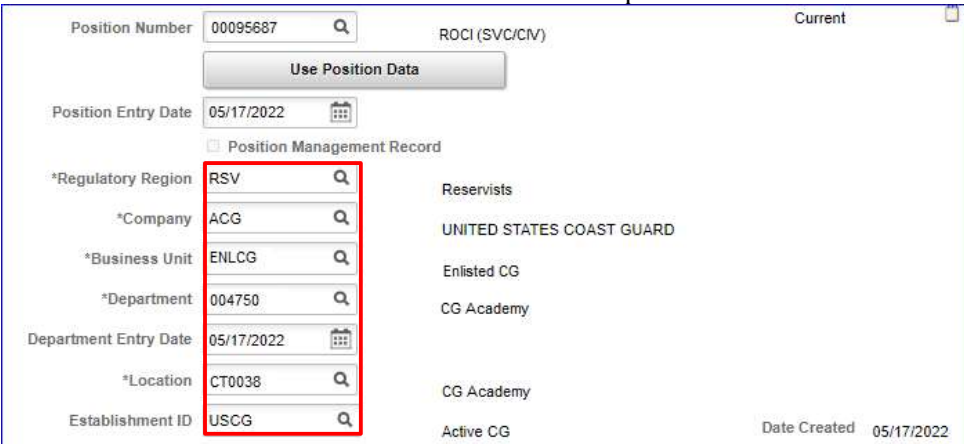
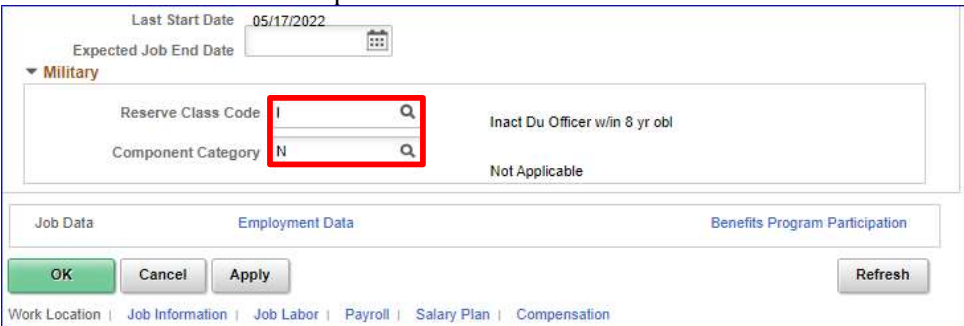
Procedure,
continued

Step	Action
19	<p>The Job Data screen displays. The Empl ID and Empl Record will be generated on the Work Location tab (Record this number for future reference.) See Notes.</p> <ul style="list-style-type: none"> • Effective Date – Defaults to the current date. This date may be future dated to reflect the actual hire date. • Effective Sequence – Do not change. • Action – Select Hire from the drop-down. • Reason – Select New Position from the drop-down. • Position Number – Enter 00095687 currently, for Seaman Apprentice Officer Candidate (SAOC) into the IRR & hit tab. <p>Click the Override Position Data button.</p>  <p>NOTE: If for any reason this Accession is not completed but an Empl ID was issued and Job data was never entered, use the Add Employment Instance link from the HR Data Shortcuts tile. Enter the Empl ID that was issued, select the Organizational Relationship tab, click Add Relationship & you will be returned to Job Data with the issued Empl ID. All previous unsaved Job Data entries will need to be re-entered.</p> <p>NOTE: Do not use the Add Employment Instance if you had previously entered and saved anything in Job Data with an EMPL ID given. Any edits after the initial save will create a second Empl ID for the member. Any edits should be made using the Personal Information or Job Data links. See Employee Records.</p> 

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Accessing the Member into Direct Access, Continued


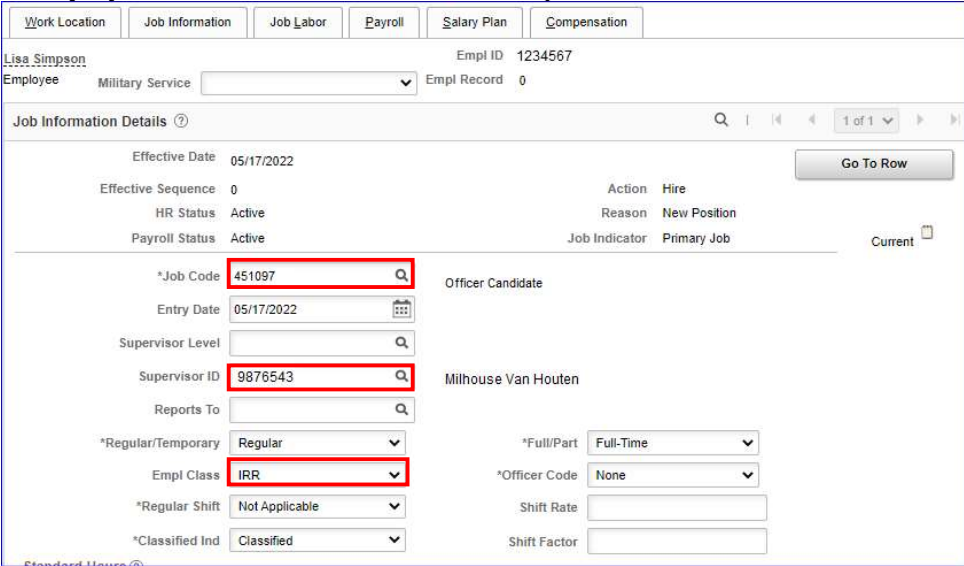

Procedure,
continued

Step	Action
20	<p>Change/update as necessary:</p> <ul style="list-style-type: none"> • Regulatory Region – Select RSV from the lookup icon. • Company – Verify ACG is displayed. • Business Unit – Select ENLCG from the lookup icon. • Department – Enter 004750. • Department Entry Date – Verify the Date of hire. • Location – If not defaulted from the Department entered, enter CT0038. • Establishment ID – Select USCG from the lookup icon. 
21	<p>Military section for Reserve hires only:</p> <ul style="list-style-type: none"> • Reserve Class Code –select the appropriate Code from the lookup icon: <ul style="list-style-type: none"> – Inact Du Officer w/in 8 yr obl – for an Officer with no prior, or less than 8 years prior service – w/Svc Oblig not in another Clas – for a prior service Officer • Component Category <ul style="list-style-type: none"> – Select N from the lookup icon. 

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Accessing the Member into Direct Access, Continued

Procedure,
continued

Step	Action
22	<p>Select the Job Information tab.</p> 
23	<p>Only enter these three fields, DO NOT enter any other data fields.</p> <ul style="list-style-type: none"> • Job Code – Enter 451097 (if not defaulted) and hit tab. • Supervisor ID – Enter the CGHRSUP Empl ID that approves Accessions. • Employee Class – Select IRR from the drop-down. 
24	<p>Select the Job Labor tab.</p> 

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

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

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

Step

26

Action

Only enter dates as indicated. **All other fields must be left blank.**

- **Active Duty Base Date** – Date of the hire or Oath of Office
- **AD Pay Scale Date** – Date of the hire or Oath of Office
- **DEP Date** – Leave blank.
- **Commission Date** – Date of the hire or Oath of Office
- **DIEMS Date** – Date Initial Entry Military Service (any component)
- **RSV Drill Obligation Date** – Leave blank.
- **Expected Loss Date** – 8 years from the original DIEMS date (minus 1 day)
- **Job Family Entry Date** – Date of the hire or Oath of Office
- **Mil Obligation Compl Date** – 8 years from DIEMS date (minus 1 day) unless prior discharge authorized under an approved program (i.e. VOLSEP)
- **Pay Allowance Date** – Date of the hire or Oath of Office
- **Pay Base Date** – Date member departs on RSV IADT orders to OCS.

NOTE: Submit a request to PPC Customer Care for a Statement of Creditable Service (SOCS) in the case of prior military service. Any necessary adjustments will take place via the SOCS process (see [E-Mail ALSPO B/15](#)).

Assigned Seniority Dates ?

Q

1:22 of 22

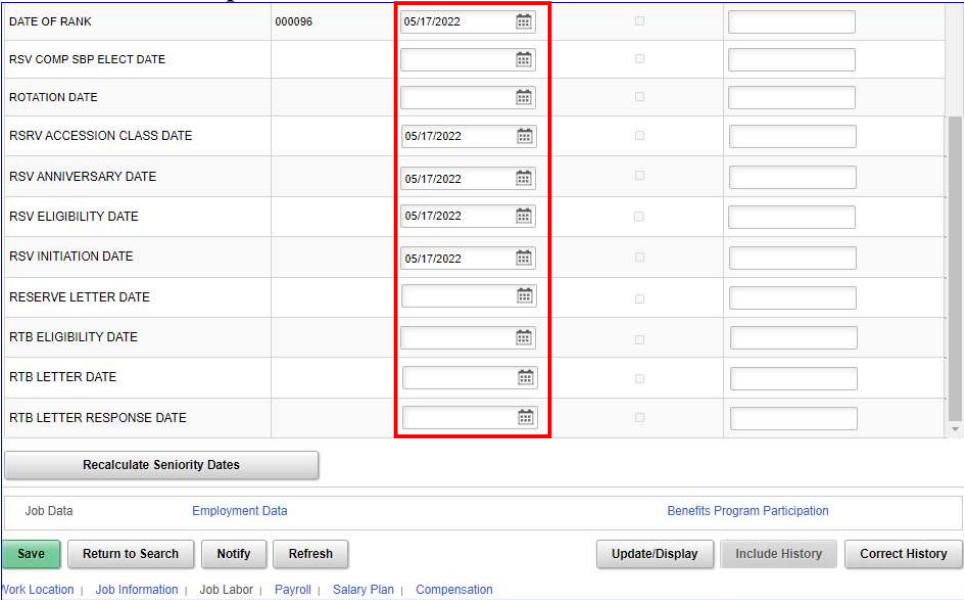

View 5

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
ACTIVE DUTY BASE DATE		05/17/2022	<input type="checkbox"/>	
AD PAY SCALE DATE		05/17/2022	<input type="checkbox"/>	
DEP DATE			<input type="checkbox"/>	
COMMISSION DATE		05/17/2022	<input type="checkbox"/>	
DIEMS DATE		05/17/2022	<input type="checkbox"/>	
RSV DRILL OBLIGATION DATE			<input type="checkbox"/>	
EXPECTED LOSS DATE		05/17/2052	<input type="checkbox"/>	
JOB FAMILY ENTRY DATE		05/17/2022	<input type="checkbox"/>	
MIL OBLIGATION COMPL DATE		05/16/2030	<input type="checkbox"/>	
PAY ALLOWANCE DATE		05/17/2022	<input type="checkbox"/>	
PAY BASE DATE		05/17/2022	<input type="checkbox"/>	

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Accessing the Member into Direct Access, Continued

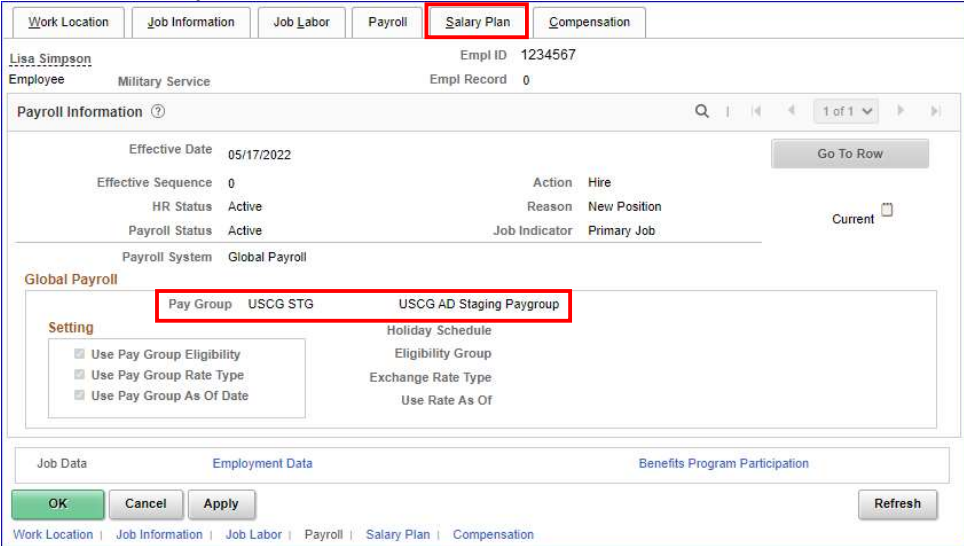
Procedure,
continued

Step	Action
26 Cont.	<ul style="list-style-type: none"> • Date of Rank – Date of the hire or Oath of Office • RSV Comp SBP Elect Date – Leave blank. • Rotation Date – Leave at default. • Reserve Accession Class Date – Date of the hire or Oath of Office/Enlistment Contract • Reserve Anniversary Date – Date of Enlistment Contract or date of initial entry if continuous service • Reserve Eligibility Date – Date of the hire or Oath of Office • Reserve Initiation Date – Date of the hire or Oath of Office • Reserve Letter Date – Leave blank. • RTB Eligibility Date – Leave blank. • RTB Letter Date – Leave blank • RTB Letter Response Date – Leave blank. 
27	<p>Select the Payroll Tab.</p> 

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

Step	Action
28	<p>Pay Group – Should default to USCG STG. Once the hire has been approved this will update to USCG RSV (USCG Reservist).</p> <p>Select the Salary Plan tab.</p>  <p>The screenshot displays the 'Payroll Information' tab for employee Lisa Simpson (Empl ID 1234567). The 'Pay Group' is set to 'USCG STG' and the 'USCG AD Staging Paygroup' is highlighted. The 'Setting' section shows options for 'Use Pay Group Eligibility', 'Use Pay Group Rate Type', and 'Use Pay Group As Of Date'. The 'Global Payroll' section shows 'Payroll System' as 'Global Payroll'.</p>

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Accessing the Member into Direct Access, Continued


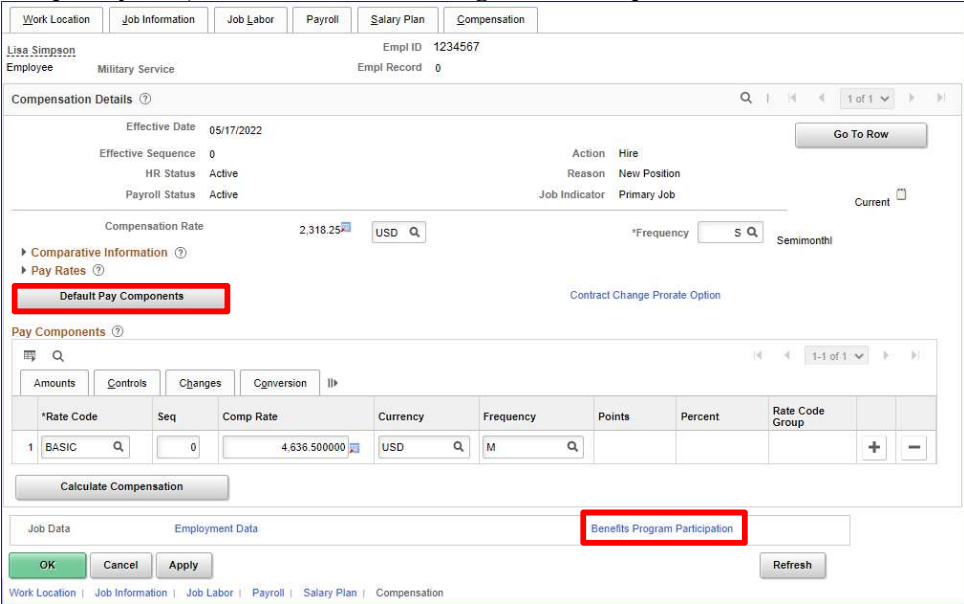
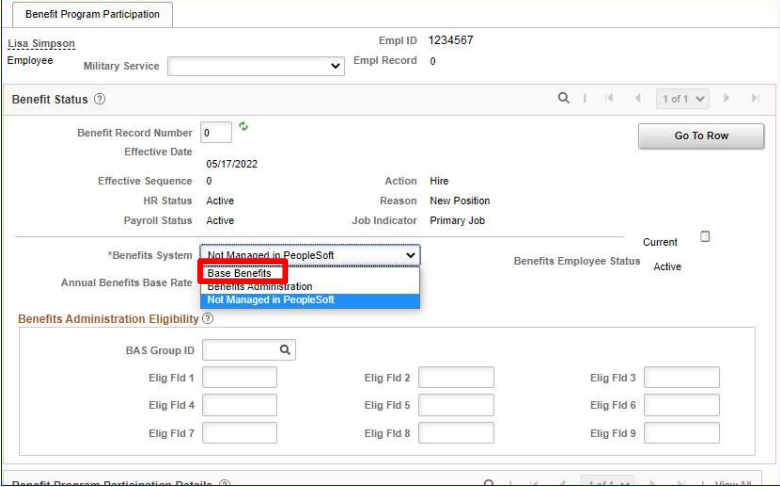
Procedure,
continued

Step	Action
29	<p>Only enter fields as indicated. All other fields must be left blank.</p> <ul style="list-style-type: none"> • Salary Admin Plan – Should default to ENL (If not, select it from the lookup icon). • Grade – Defaults to the Pay Grade based on the Job Code entered on the Job Information Tab. If the member is being accessed at a different grade, click the lookup icon and select the appropriate Grade. In this example E2 based on SAOC Job Code. • Grade Entry Date – Should default to the date of hire. • Step – Enter 1 and hit tab. <p>NOTE: If the Job Code number does not match the Grade Step – An error message is received when the SPO is trying to approve the hire and must be fixed.</p> <p>NOTE: This step is necessary for the information on the Compensation tab to populate.</p> <ul style="list-style-type: none"> • Step Entry Date – Will default to the date of hire. <p>Select the Compensation tab.</p>

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

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

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

Step	Action
33	<p>Only enter fields as indicated. All other fields must be left blank.</p> <ul style="list-style-type: none"> • Effective Date – If completing the Job Data AFTER the effective date of hire, change the date to the date of hire. • Benefit Program – Select ACG from the lookup icon. <p>Click the Job Data link.</p>

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Accessing the Member into Direct Access, Continued

Procedure,
continued

Step	Action
34	<p>To submit, click OK.</p> <div> <div>Work Location Job Information Job Labor Payroll Salary Plan Compensation</div> <div> <div> <div>Lisa Simpson</div> <div>Employee</div> </div> <div> <div>Empl ID 1234567</div> <div>Empl Record 0</div> </div> </div> <div> <div> <div>Military Service</div> <div></div> </div> <div> <div>Go To Row</div> <div>+</div> <div>-</div> </div> </div> <div> <div>Work Location Details</div> <div> <div> <div>*Effective Date</div> <div>05/17/2022</div> </div> <div> <div>Effective Sequence</div> <div>0</div> </div> <div> <div>HR Status</div> <div>Active</div> </div> <div> <div>Payroll Status</div> <div>Active</div> </div> <div> <div>Calculate Status and Dates</div> </div> <div> <div>*Action</div> <div>Hire</div> </div> <div> <div>Reason</div> <div>New Position</div> </div> <div> <div>*Job Indicator</div> <div>Primary Job</div> </div> </div> <div> <div> <div>Position Number</div> <div>00095687</div> <div>ROCI (SVC/CIV)</div> </div> <div> <div>Use Position Data</div> </div> <div> <div>Position Entry Date</div> <div>05/17/2022</div> </div> <div> <div>Position Management Record</div> <div></div> </div> <div> <div>*Regulatory Region</div> <div>RSV</div> <div>Reservists</div> </div> <div> <div>*Company</div> <div>ACG</div> <div>UNITED STATES COAST GUARD</div> </div> <div> <div>*Business Unit</div> <div>OFFCG</div> <div>Enlisted CG</div> </div> <div> <div>*Department</div> <div>004750</div> <div>CG Academy</div> </div> <div> <div>Department Entry Date</div> <div>05/17/2022</div> </div> <div> <div>*Location</div> <div>CT0038</div> <div>CG Academy</div> </div> <div> <div>Establishment ID</div> <div>USCG</div> <div>Active CG</div> </div> <div> <div>Date Created</div> <div>05/17/2022</div> </div> </div> <div> <div>Last Start Date</div> <div>05/17/2022</div> </div> <div> <div>Expected Job End Date</div> <div></div> </div> <div> <div>Military</div> <div> <div>Reserve Class Code</div> <div>I</div> <div>Inact Du Officer w/in 8 yr obl</div> </div> <div> <div>Component Category</div> <div>N</div> <div>Not Applicable</div> </div> </div> <div> <div>Job Data</div> <div>Employment Data</div> <div>Benefits Program Participation</div> </div> <div> <div>OK</div> <div>Cancel</div> <div>Apply</div> <div>Refresh</div> </div> <div> <div>Work Location Job Information Job Labor Payroll Salary Plan Compensation</div> </div> </div></div>

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Accessing the Member into Direct Access, Continued

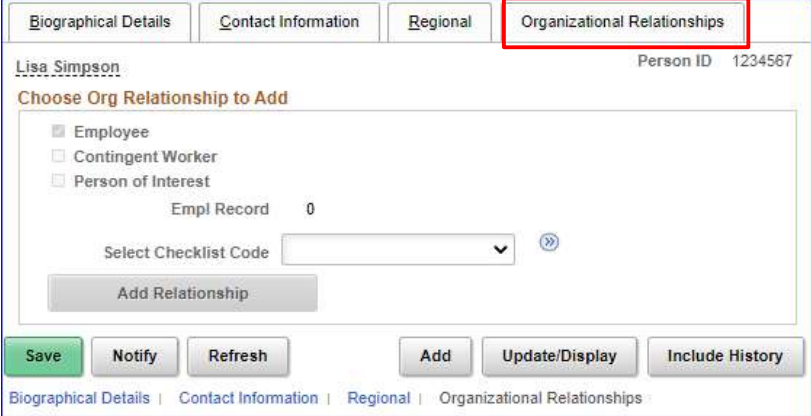
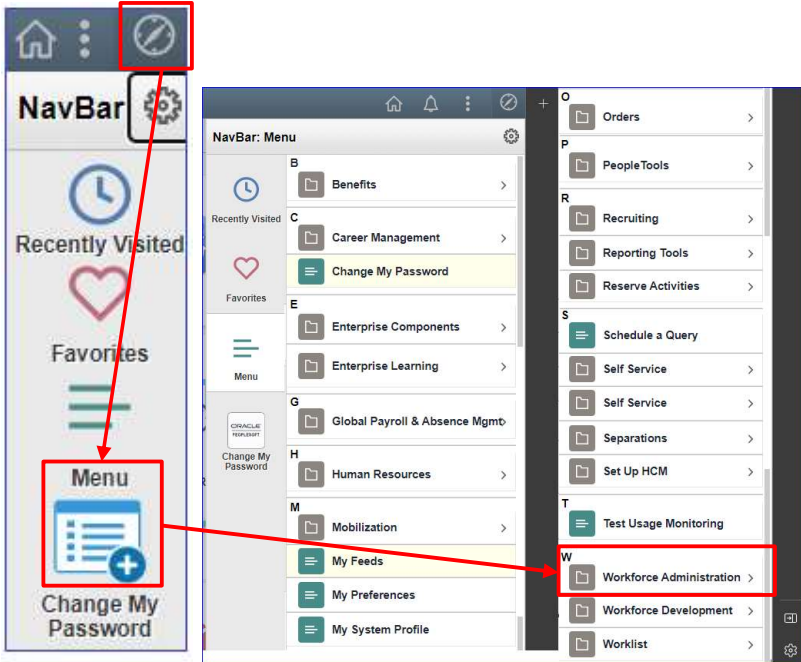
Procedure,
continued

Step	Action
35	<p data-bbox="386 464 1279 527">Several Messages will display (randomly ordered). Click OK for each one (wait for the “processing-circle-of-death” to finish).</p> <div data-bbox="386 527 1344 716"> <p data-bbox="402 558 1052 579">Warning -- Head count of 1366 exceeds maximum head count of 0 for position. (1000,156)</p> <p data-bbox="402 590 1328 632">When Position Management is installed, head counts for each position are compared to the maximum head count on the Specific Information page. Correct position number, change maximum to allow an additional incumbent, or leave as is.</p> <div data-bbox="776 642 1000 684"> <input data-bbox="781 646 898 680" type="button" value="OK"/> <input data-bbox="919 646 997 680" type="button" value="Cancel"/> </div> </div> <div data-bbox="386 747 1073 957"> <p data-bbox="402 779 1032 810">Warning -- Compensation Frequency has been updated. (1010,264)</p> <p data-bbox="402 821 821 852">Compensation Frequency has been updated.</p> <div data-bbox="589 873 873 926"> <input data-bbox="594 877 743 926" type="button" value="OK"/> <input data-bbox="756 877 870 926" type="button" value="Cancel"/> </div> </div> <div data-bbox="386 999 1344 1199"> <p data-bbox="402 1020 1089 1041">Warning -- Hourly Rate is less than the minimum specified in the Salary Grade Table. (1000,32)</p> <p data-bbox="402 1052 1328 1083">A minimum hourly rate is specified in the Salary Grade Table, and the hourly rate entered on this panel falls below that minimum.</p> <p data-bbox="402 1094 1049 1115">If the specified hourly rate is correct, leave as is. Otherwise, enter the correct hourly rate.</p> <div data-bbox="760 1136 984 1178"> <input data-bbox="764 1140 881 1173" type="button" value="OK"/> <input data-bbox="902 1140 980 1173" type="button" value="Cancel"/> </div> </div> <div data-bbox="386 1230 1117 1419"> <p data-bbox="402 1272 1068 1304">JOB DATA CMP EMPLID : 1234567 COMPANY ACG ACTION HIR (0,0)</p> <div data-bbox="667 1325 821 1377"> <input data-bbox="672 1329 808 1371" type="button" value="OK"/> </div> </div>

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

Step	Action
36	<p>After a successful completion you will be returned to the Organizational Relationships tab. Return to the Direct Access home page.</p> 
37	<p>If you have the roles to add the member's gender, navigate to the NavBar icon > Menu > Workforce Administration drop-down arrow > Personal Information > Biographical > Modify a Person's Gender (not shown). If you do not have the roles, a PPC help ticket must be entered to have this information added.</p> 

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Accessing the Member into Direct Access, Continued

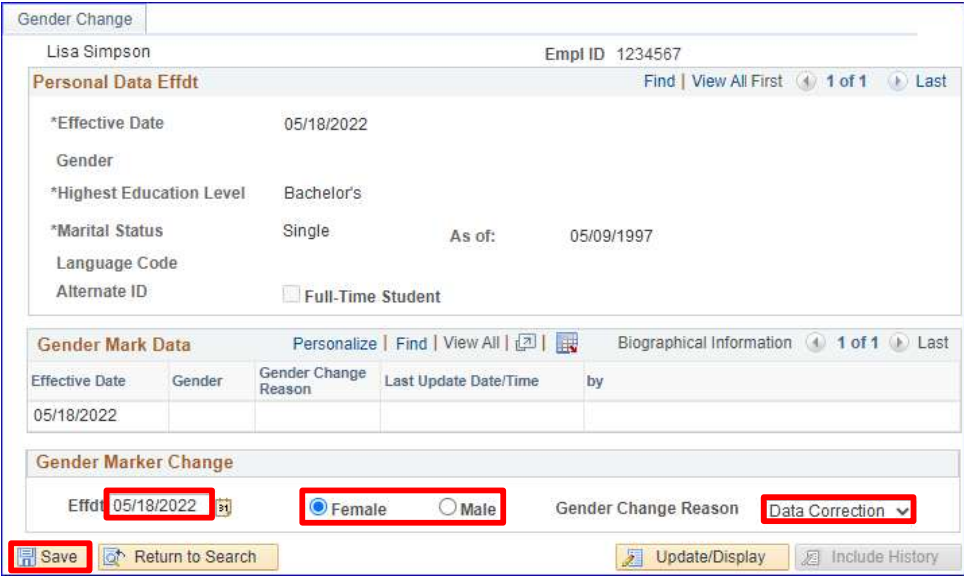
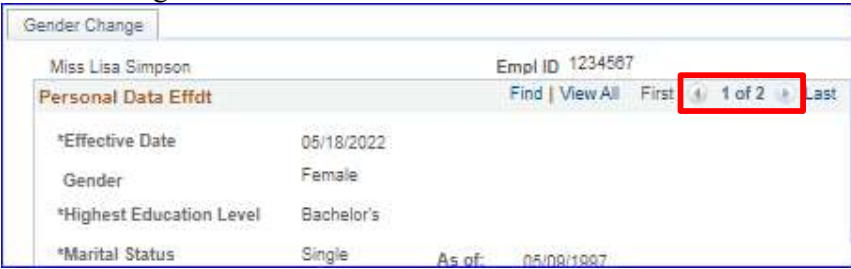
Procedure,
continued

Step	Action
38	<p>Enter the Empl ID and click Search. The Include History box is already checked.</p> <div><p>Personal Gender Change</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>▼ Search Criteria</p><p>Empl ID begins with ▼ 1234567</p><p>Name begins with ▼</p><p>Last Name begins with ▼</p><p>Second Last Name begins with ▼</p><p>Alternate Character Name begins with ▼</p><p>Middle Name begins with ▼</p><p>Business Unit begins with ▼</p><p>Department Set ID begins with ▼</p><p>Department begins with ▼</p><p><input checked="" type="checkbox"/> Include History <input type="checkbox"/> Case Sensitive</p><p>Search Clear Basic Search Save Search Criteria</p></div>

Continued on next page

Accessing the Member into Direct Access, Continued

Procedure,
continued

Step	Action
39	<p>The Gender Change tab will display. The Gender Marker Change Effdt must be the day after your date of entry. This date cannot be backdated.</p> <p>Select the appropriate Gender radio button and select Data Correction from the Gender Change Reason drop-down (used for entering a new member's gender OR to correct an incorrect gender).</p> <p>NOTE: DO NOT USE Gender Marker Change – Used to modify a member who has followed established COMDT Policy and is physically changing genders.</p> <p>Click Save.</p> 
40	<p>Now showing 1 of 2 rows.</p> 

Approving an Accession

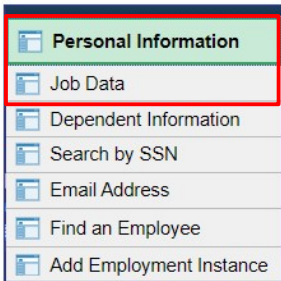
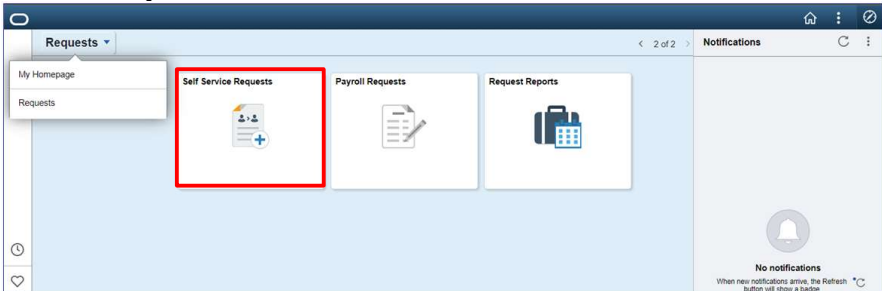
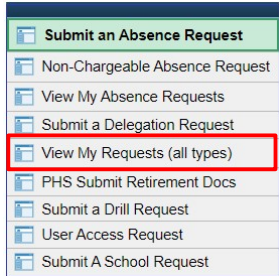
Introduction This section provides the procedures for approving an Accession in DA.

Information

- SPO Auditor/PAO user access is required to approve an accession.
- The approver cannot be the same person who entered the accession.

The member will **NOT be paid** until the accession transaction is approved (remains in the staging Pay Group), the contract is entered and then the contract is approved.

Procedure See below.

Step	Action
1	<p>Before approving the accession, review/audit the information by clicking on the Personal Information and the Job Data options.</p> 
2	<p>After selecting Requests from the My Homepage drop-down, click on the Self Service Requests tile.</p> 
2.5	<p>Select the View My Requests (all types) option.</p> 

Continued on next page

Approving an Accession, Continued

Procedure,
continued

Step	Action
3	Select the Requests I am Approver For radio button. You may narrow the search by filling in the Transaction Name , Status and Dates . Click Populate Grid .

View My Action Requests

Milhouse Van Houten

1. 'My Submitted Requests' allows member to bring up only their Action Requests.
2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them.
3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them.
4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.)
5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'.
6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.

☐ My Submitted Requests

☒ Requests I am Approver For

☐ All Requests

Transaction Name:

All Transactions

Transaction Status:

Pending

Submission From Date:

Submission To Date:

Populate Grid

Refresh

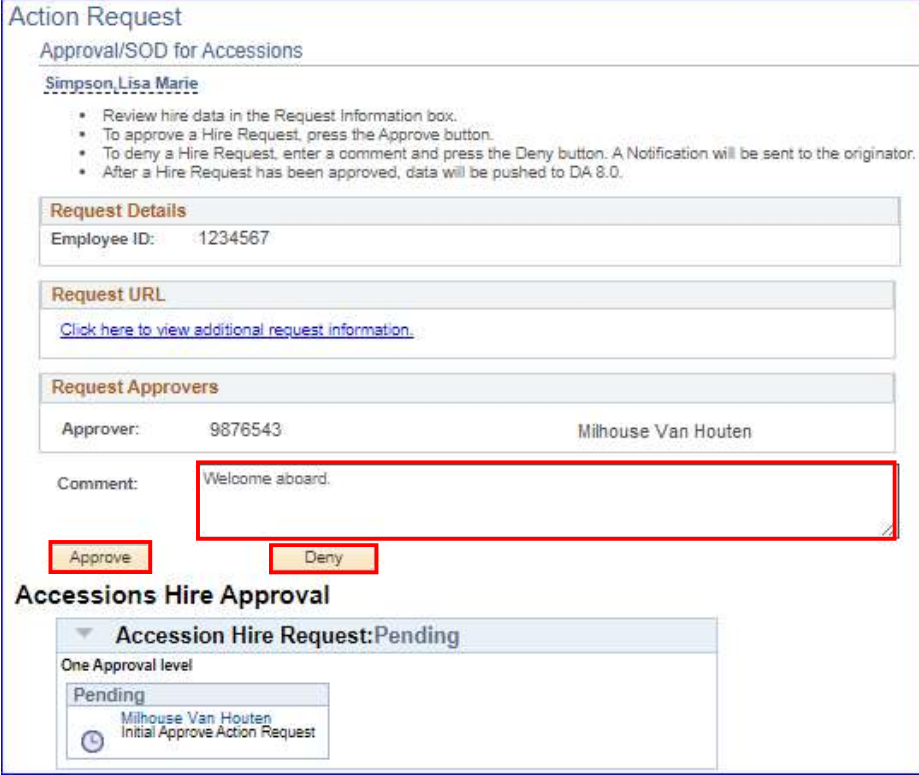
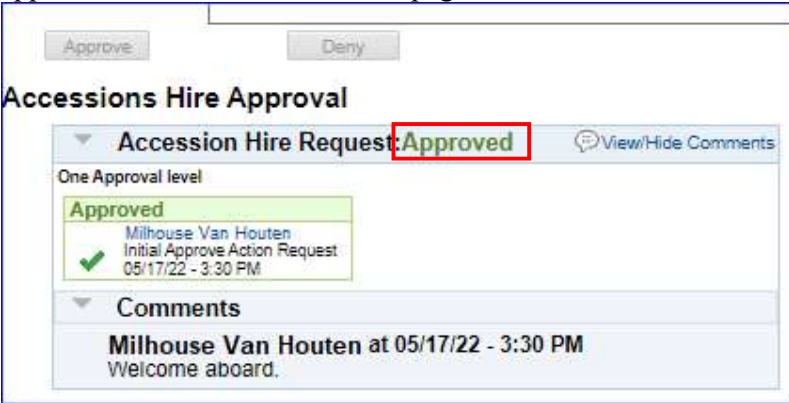
4 Click the **Approve/Deny** link for the accession you are approving.

Transaction Name	Status	Member	Member's Last Name	Member's Emplid	Member's Deptid	Submitted By	Approver	Submission Date	Drill Date	Approve/Deny
AccessionHire	Pending	Lisa Simpson	Simpson	1234567	002817	Ralph Wiggum	Milhouse Van Houten	2022/05/17		Approve/Deny

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Approving an Accession, Continued

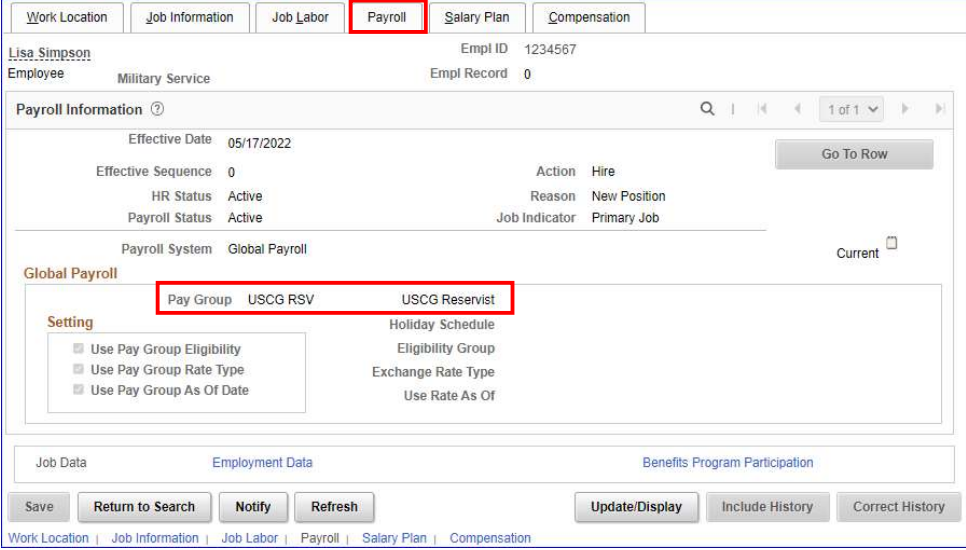
Procedure,
continued

Step	Action
5	<p>Enter any needed Comments and select either Approve or Deny (deny returns the accession to the HRS user).</p>  <p>Action Request</p> <p>Approval/SOD for Accessions</p> <p>Simpson, Lisa Marie</p> <ul style="list-style-type: none"> Review hire data in the Request Information box. To approve a Hire Request, press the Approve button. To deny a Hire Request, enter a comment and press the Deny button. A Notification will be sent to the originator. After a Hire Request has been approved, data will be pushed to DA 8.0. <p>Request Details</p> <p>Employee ID: 1234567</p> <p>Request URL</p> <p>Click here to view additional request information.</p> <p>Request Approvers</p> <p>Approver: 9876543 Milhouse Van Houten</p> <p>Comment: Welcome aboard.</p> <p>Approve Deny</p> <p>Accessions Hire Approval</p> <p>Accession Hire Request: Pending</p> <p>One Approval level</p> <p>Pending</p> <p>Milhouse Van Houten Initial Approve Action Request</p>
6	<p>Once Approved, the buttons will be greyed out after the system saves the approval. Click the X to close the page.</p>  <p>Accessions Hire Approval</p> <p>Approve Deny</p> <p>Accession Hire Request: Approved View/Hide Comments</p> <p>One Approval level</p> <p>Approved</p> <p>Milhouse Van Houten Initial Approve Action Request 05/17/22 - 3:30 PM</p> <p>Comments</p> <p>Milhouse Van Houten at 05/17/22 - 3:30 PM Welcome aboard.</p>

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Approving an Accession, Continued


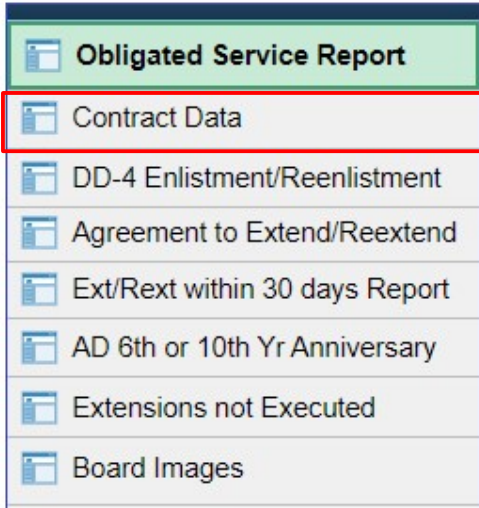
Procedure,
continued

Step	Action
7	<p>Return to the Job Data Payroll tab to confirm the members Pay Group has changed to USCG RSV and repeat the process for the next accession.</p>  <p>The screenshot shows the 'Payroll Information' tab for employee Lisa Simpson (Empl ID 1234567). The 'Payroll' tab is selected. The 'Pay Group' is set to 'USCG RSV' and 'USCG Reservist'. The 'Setting' section shows 'Use Pay Group Eligibility', 'Use Pay Group Rate Type', and 'Use Pay Group As Of Date' all checked. The 'Global Payroll' section shows 'Pay Group' as 'USCG RSV' and 'USCG Reservist'.</p>

Entering Contract Data

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

Procedure See below.

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

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Entering Contract Data, Continued

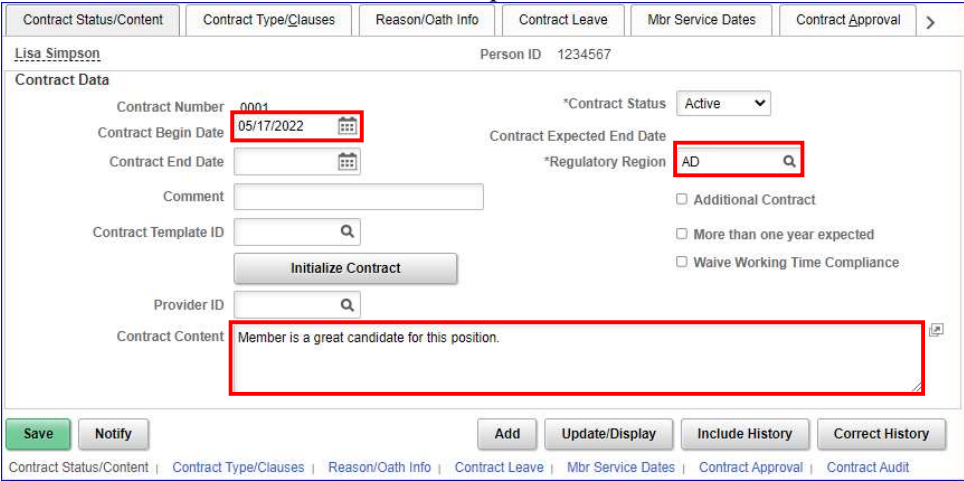
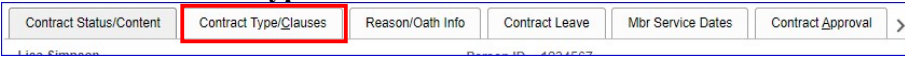
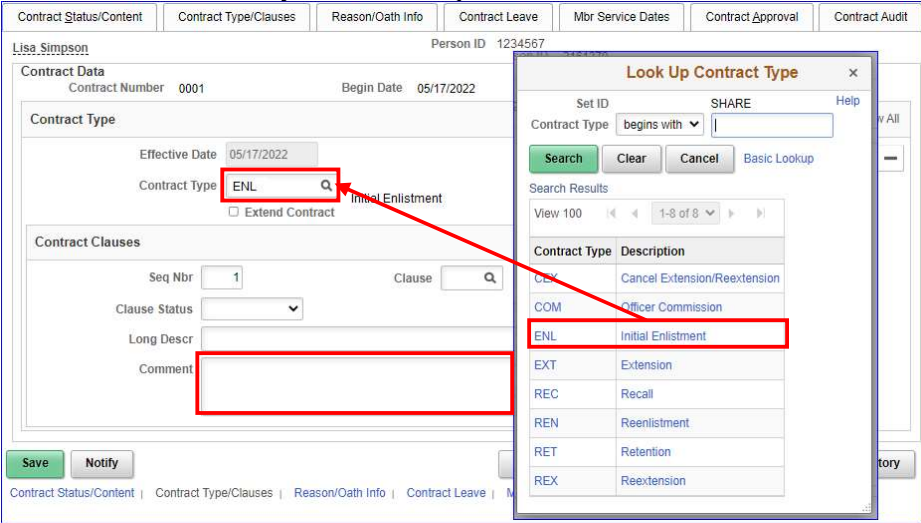
Procedure,
continued

Step	Action
2	<p>Click the Add a New Value tab.</p> <div> <p>Update Contracts Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>▼ Search Criteria</p> <p>Empl ID begins with <input type="text"/></p> <p>Contract Number begins with <input type="text"/></p> <p>Name begins with <input type="text"/></p> <p>Last Name begins with <input type="text"/></p> <p>Second Last Name begins with <input type="text"/></p> <p>Alternate Character Name begins with <input type="text"/></p> <p><input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria</p> <p>Find an Existing Value Add a New Value</p> </div>
3	<p>Enter the Empl ID and the Contract Number (Ex. 0001). Click Add.</p> <div> <p>Update Contracts</p> <p>Find an Existing Value Add a New Value</p> <p>*Empl ID 1234567 <input type="text"/></p> <p>*Contract Number 0001 <input type="text"/></p> <p>Add</p> <p>Find an Existing Value Add a New Value</p> </div>

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Entering Contract Data, Continued

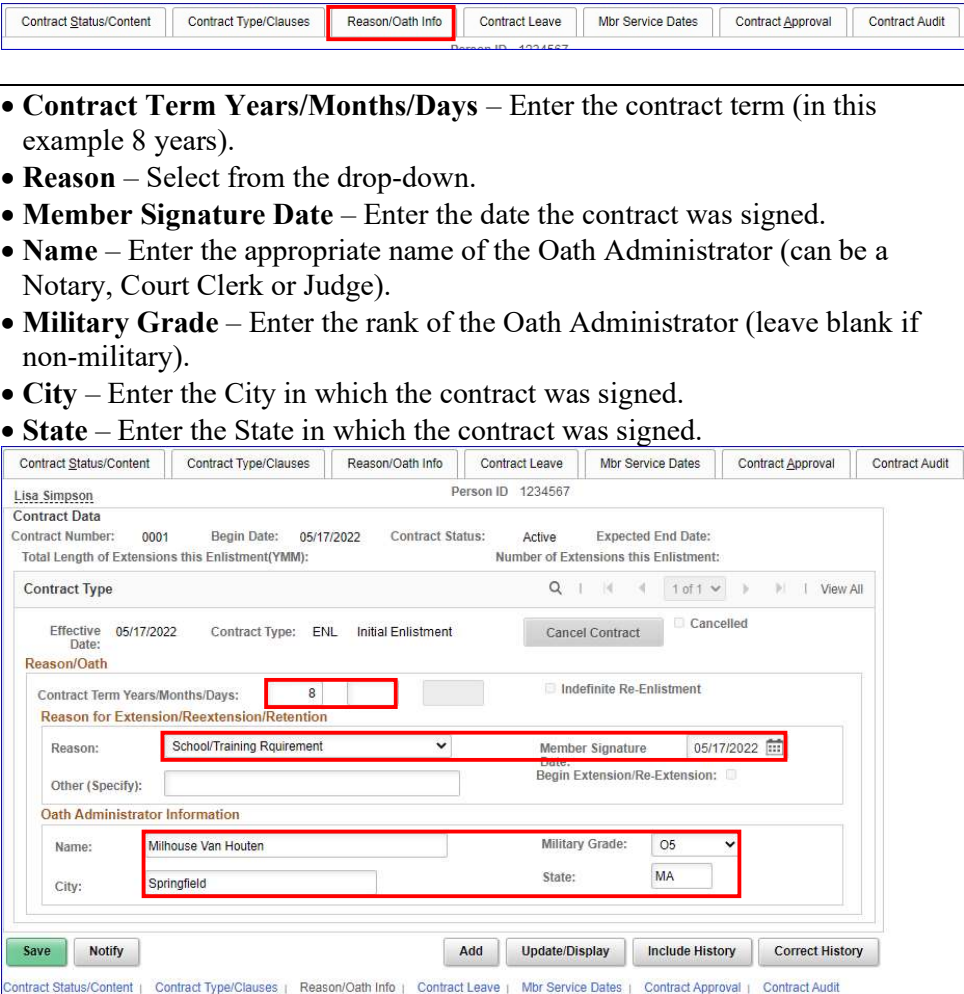

Procedure,
continued

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

Continued on next page

Entering Contract Data, Continued

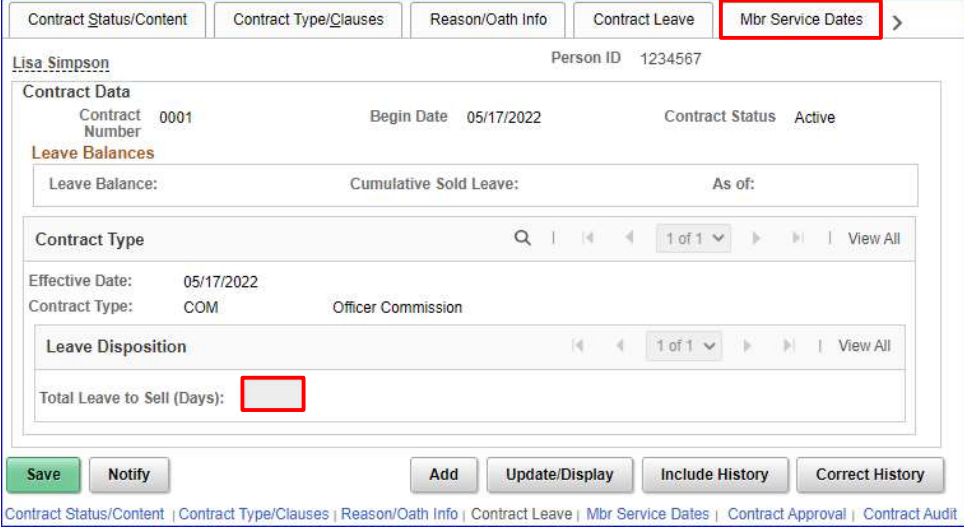

Procedure,
continued

Step	Action
7	<p>Select the Reason/Oath Info tab.</p>  <ul style="list-style-type: none"> • Contract Term Years/Months/Days – Enter the contract term (in this example 8 years). • Reason – Select from the drop-down. • Member Signature Date – Enter the date the contract was signed. • Name – Enter the appropriate name of the Oath Administrator (can be a Notary, Court Clerk or Judge). • Military Grade – Enter the rank of the Oath Administrator (leave blank if non-military). • City – Enter the City in which the contract was signed. • State – Enter the State in which the contract was signed.
8	<p>Select the Contract Leave tab.</p> 

Continued on next page

Entering Contract Data, Continued



Procedure,
continued

Step	Action
9	<p>Total Leave to Sell (Days) – Greyed out for OCS hires.</p> <p>Select the Mbr Service Dates tab.</p>  <p>The screenshot shows the 'Mbr Service Dates' tab selected. It displays contract data for Lisa Simpson (Person ID 1234567). The 'Total Leave to Sell (Days)' field is highlighted with a red box. Other fields include Contract Number 0001, Begin Date 05/17/2022, and Contract Status Active. The 'Leave Balances' section shows Leave Balance, Cumulative Sold Leave, and As of. The 'Contract Type' section shows Effective Date 05/17/2022, Contract Type COM, and Officer Commission. The 'Leave Disposition' section shows 1 of 1. The 'Total Leave to Sell (Days)' field is highlighted with a red box. Buttons at the bottom include Save, Notify, Add, Update/Display, Include History, and Correct History. A breadcrumb trail at the bottom shows Contract Status/Content, Contract Type/Clauses, Reason/Oath Info, Contract Leave, Mbr Service Dates, Contract Approval, and Contract Audit.</p>
10	<p>Click View All on the Assigned Seniority Dates,</p>  <p>The screenshot shows the 'Assigned Seniority Dates' section. It displays a table with columns for Seniority Date and Labor Seniority Date. The 'View All' button is highlighted with a red box. Other fields include Effective Date 05/17/2022, Empl Rcd 0, Eff Seq 0, and Labor Agreement OFF. The 'Assigned Seniority Dates' section shows 1-12 of 22. The 'View All' button is highlighted with a red box. Buttons at the bottom include Save, Notify, Add, Update/Display, Include History, and Correct History. A breadcrumb trail at the bottom shows Contract Status/Content, Contract Type/Clauses, Reason/Oath Info, Contract Leave, Mbr Service Dates, Contract Approval, and Contract Audit.</p>

Continued on next page

Entering Contract Data, Continued

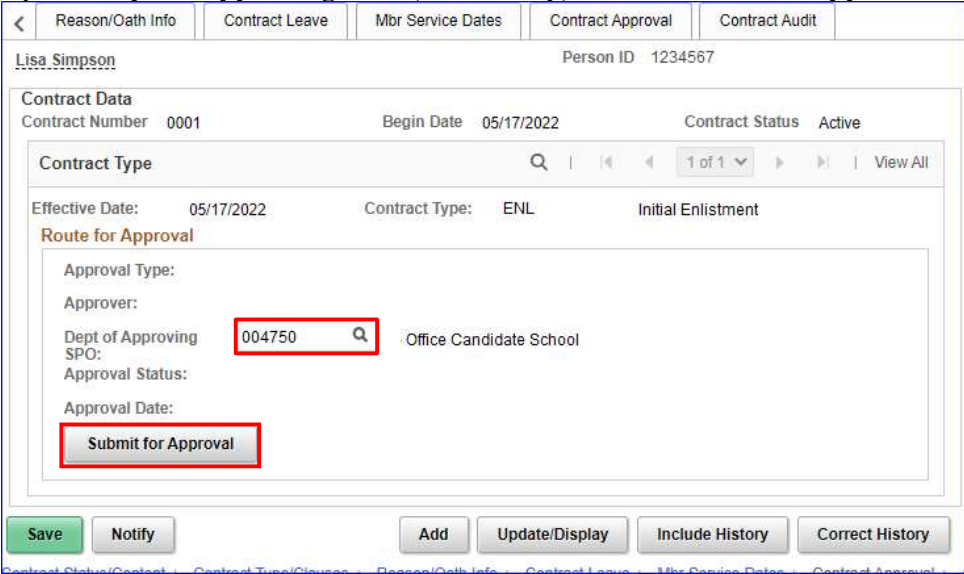
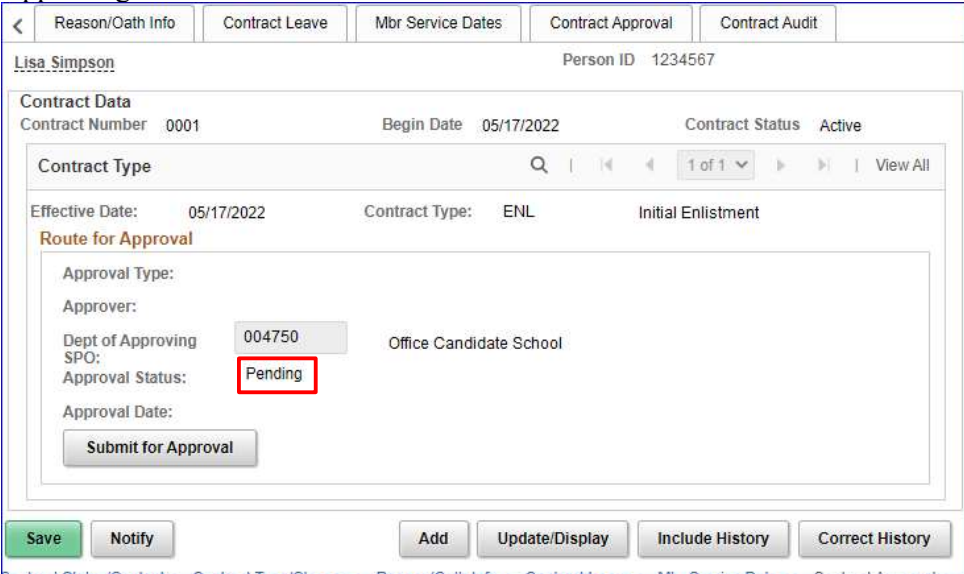
Procedure,
continued

Step	Action
11	<p>Confirm Labor Seniority Dates set during the Accession process are correct. If not, return to Job Data and verify the dates were entered correctly.</p> 
12	<p>Select the Contract Approval tab.</p> 

Continued on next page

Entering Contract Data, Continued

Procedure,
continued

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

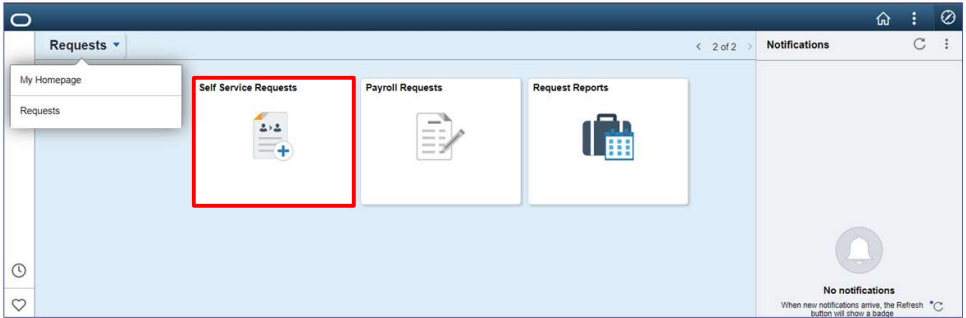
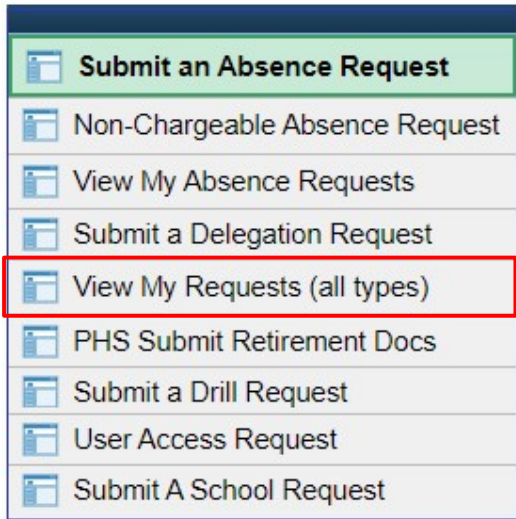
Approving a Contract

Introduction This section provides the procedures for approving a contract in DA.

Information

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

Procedure See below.

Step	Action
1	<p>After selecting Requests from the My Homepage drop-down, click on the Self Service Requests tile.</p> 
1.5	<p>Select the View My Requests (all types) option.</p> 

Continued on next page

Approving a Contract, Continued


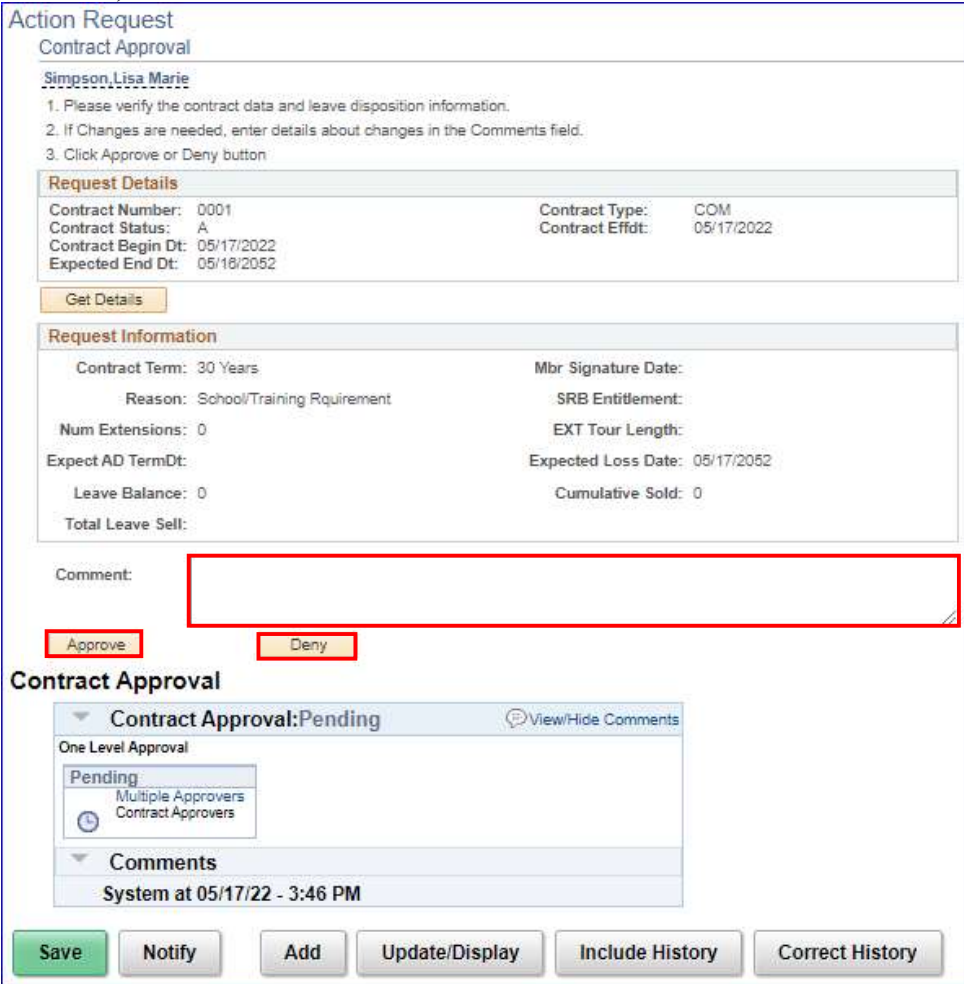
Procedure,
continued

Step	Action
2	<p>Select the Requests I am Approver For radio button. You may narrow the search by filling in the Transaction Name, Status and Dates. Click Populate Grid.</p> <div> <p>View My Action Requests</p> <p><u>Milhouse Van Houten</u></p> <p>1. 'My Submitted Requests' allows member to bring up only their Action Requests. 2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them. 3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them. 4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.) 5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'. 6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.</p> <p> <input type="radio"/> My Submitted Requests <input checked="" type="radio"/> Requests I am Approver For <input type="radio"/> All Requests </p> <p> Transaction Name: All Transactions </p> <p> Transaction Status: Pending </p> <p> Submission From Date: </p> <p> Submission To Date: </p> <p> <input type="button" value="Populate Grid"/> <input type="button" value="Refresh"/> </p> </div>

Continued on next page

Approving a Contract, Continued

Procedure,
continued

Step	Action
3	<p>Click the Approve/Deny link for the contract you are approving.</p>  <p>The screenshot shows a table with columns: Transaction Name, Status, Member, Member's Last Name, Member's Emplid, Member's Deptid, Submitted By, Approver, Submission Date, and Approve/Deny. The row for 'Contract Approval' is highlighted, and the 'Approve/Deny' link is red.</p>
4	<p>Enter Comments and click Approve or Deny (deny returns the contract to the HRS user).</p>  <p>The screenshot shows the 'Action Request' form for 'Contract Approval'. It includes sections for 'Request Details' (Contract Number: 0001, Contract Status: A, Contract Begin Dt: 05/17/2022, Expected End Dt: 05/16/2052), 'Request Information' (Contract Term: 30 Years, Reason: School/Training Requirement, Mbr Signature Date, SRB Entitlement, EXT Tour Length, Expected Loss Date: 05/17/2052, Cumulative Sold: 0), and a 'Comment' field. Below the comment field are 'Approve' and 'Deny' buttons, both highlighted in red. At the bottom, there is a 'Contract Approval' summary box showing 'Contract Approval: Pending' and a 'Comments' section with the text 'System at 05/17/22 - 3:46 PM'. Buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History' are at the bottom.</p>

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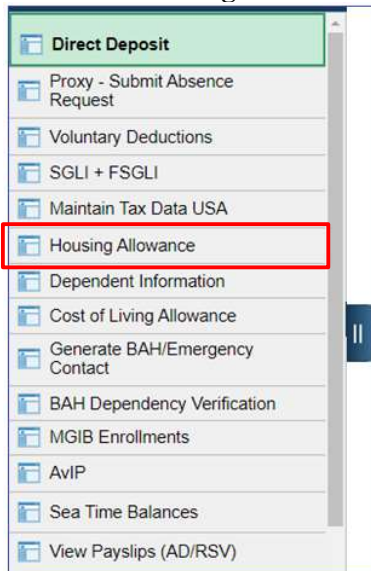
Approving a Contract, Continued

Procedure,
continued

Step	Action
5	<p>The contract is approved, and the member is fully accessed into the Coast Guard with pay.</p>  <p>The screenshot displays a web interface for 'Contract Approval'. At the top, there are 'Approve' and 'Deny' buttons. Below them, the title 'Contract Approval' is followed by a status bar that reads 'Contract Approval: Approved', with the word 'Approved' highlighted in a red box. To the right of the status bar is a 'View/Hide Comments' link. Underneath, a section titled 'One Level Approval' shows a green 'Approved' status, a checkmark, the name 'Milhouse Van Houten', the role 'Contract Approvers', and the timestamp '05/17/22 - 3:51 PM'. A 'Comments' section at the bottom shows a system message: 'System at 05/17/22 - 3:46 PM'.</p>

BAH and Direct Deposit


Introduction	This section provides the procedures for ensuring the member is receiving Basic Allowance for Housing (BAH) and that their direct deposit has been set up to receive pay.
Information	Once the hire, the contract and the BAH are approved, then direct deposit must be entered.
Procedures	See below.

Step	Action
1	Click on the Active/Reserve Pay tile. 
1.5	Select the Housing Allowance option. 

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Approving a Contractand Direct Deposit, Continued

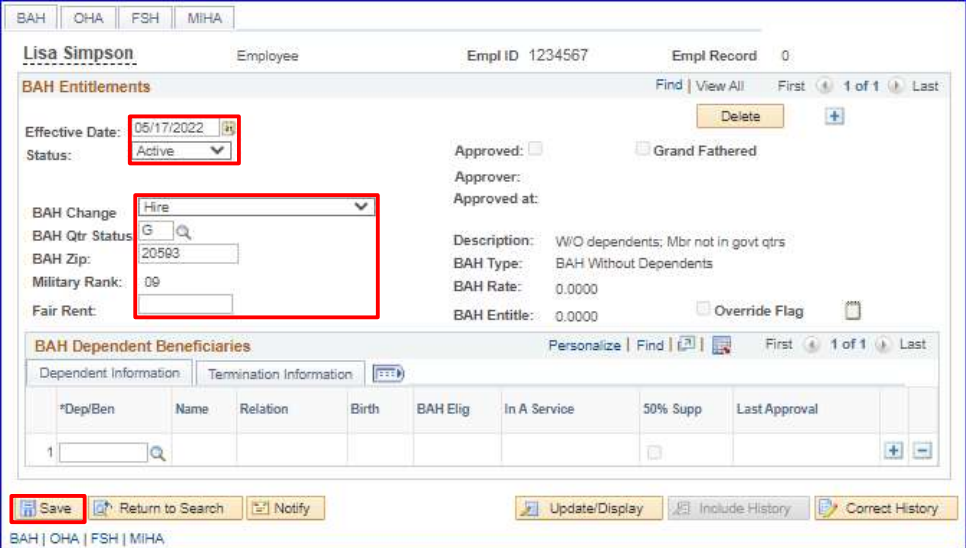
Procedure,
continued

Step	Action
2	<p>Enter the Empl ID and click Search.</p> <div> <p>Housing Allowance</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>▼ Search Criteria</p> <p>Empl ID begins with ▼ 1234567</p> <p>Empl Record = ▼ <input type="text"/></p> <p>Name begins with ▼ <input type="text"/></p> <p>Last Name begins with ▼ <input type="text"/></p> <p>Second Last Name begins with ▼ <input type="text"/></p> <p>Alternate Character Name begins with ▼ <input type="text"/></p> <p>Middle Name begins with ▼ <input type="text"/></p> <p>Business Unit begins with ▼ <input type="text"/></p> <p>Department Set ID begins with ▼ <input type="text"/> 🔍</p> <p>Department begins with ▼ <input type="text"/> 🔍</p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search  Save Search Criteria</p> </div>

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Approving a Contractand Direct Deposit, Continued

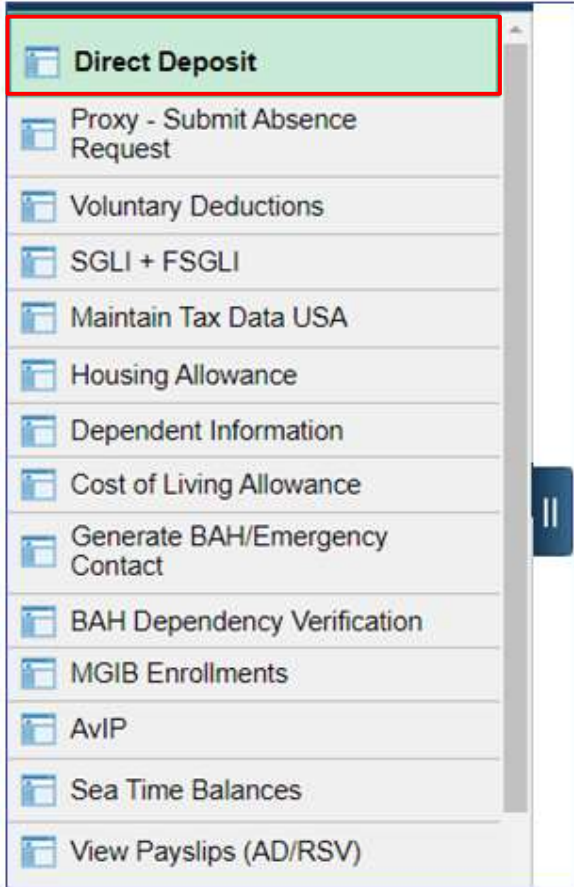
Procedure,
continued

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

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Approving a Contract and Direct Deposit, Continued

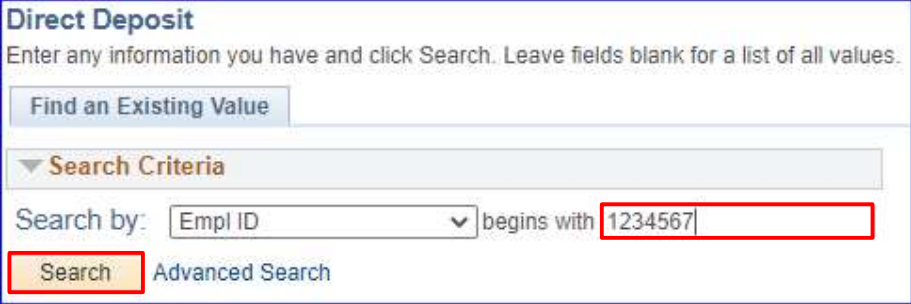
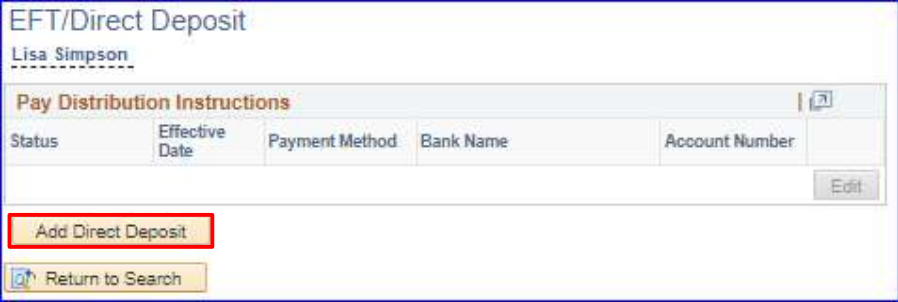
Procedure,
continued

Step	Action
4	<p>Without leaving the screen, select the Direct Deposit option.</p>  <p>The screenshot shows a vertical list of menu items. The first item, 'Direct Deposit', is highlighted with a green background and a red border. The other items are: Proxy - Submit Absence Request, Voluntary Deductions, SGLI + FSGLI, Maintain Tax Data USA, Housing Allowance, Dependent Information, Cost of Living Allowance, Generate BAH/Emergency Contact, BAH Dependency Verification, MGIB Enrollments, AvIP, Sea Time Balances, and View Payslips (AD/RSV). A blue button with two vertical bars is visible on the right side of the menu.</p>

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BAH and Direct Deposit, Continued

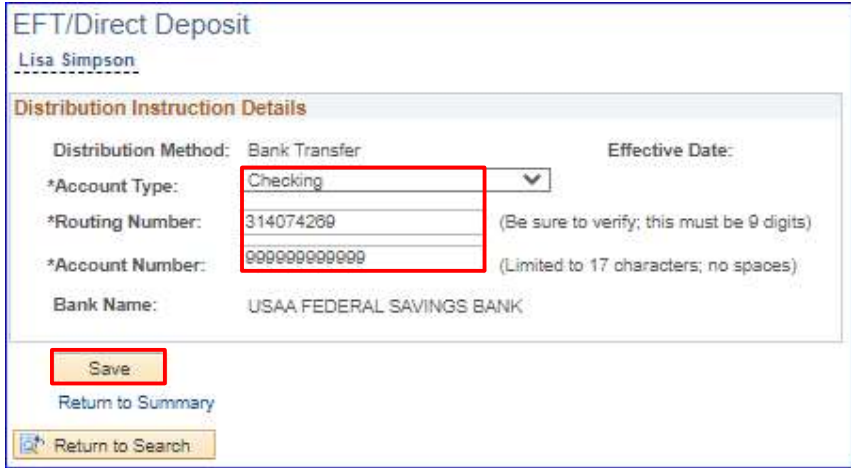
Procedure,
continued

Step	Action
5	<p>Enter the Empl ID and click Search.</p> 
6	<p>Click Add Direct Deposit.</p> 

Continued on next page

Approving a Contract and Direct Deposit, Continued

Procedure,
continued

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