

Recertifying User Roles

Introduction This guide provides the procedures for recertifying user roles in Direct Access.

Procedures See below.

Step	Action
<p>1</p>	<p>From the Requests tab, click the User Access Request link in the Self Service Requests pagelet.</p>  <p>The screenshot shows a navigation bar with 'My Page', 'Self Service', and 'Requests' tabs. Below is a 'Self Service Requests' section with a refresh icon and a settings dropdown. A grid of links includes: 'Submit an Absence Request', 'View My Absence Requests', 'View My Requests (all types)', 'Submit a Drill Request', 'Non Accrued Leave Request', 'Submit a Delegation Request', 'PHS Submit Retirement Docs', and 'User Access Request' (highlighted with a red box).</p>
<p>2</p>	<p>The User Access Request page will display. Click the Initiate Request button.</p>  <p>The screenshot shows the 'User Access Request' page with the following text: 'This page is used to request user access to the Direct Access system. This page can be used to add additional roles or delete existing roles. The request must be approved by appropriate authority.' Below this, it displays 'User ID: 1234567 Princess Moana' and an 'Initiate Request' button (highlighted with a red box). At the bottom, it states: 'Many of these roles either require special routing or additional documents in order for the role to be granted. Review the Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), Chapter 2, for additional guidance.'</p>

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Recertifying User Roles, Continued

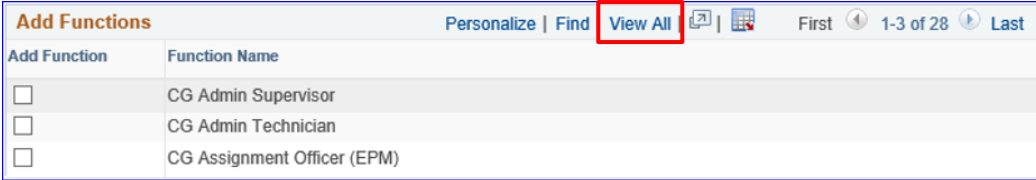
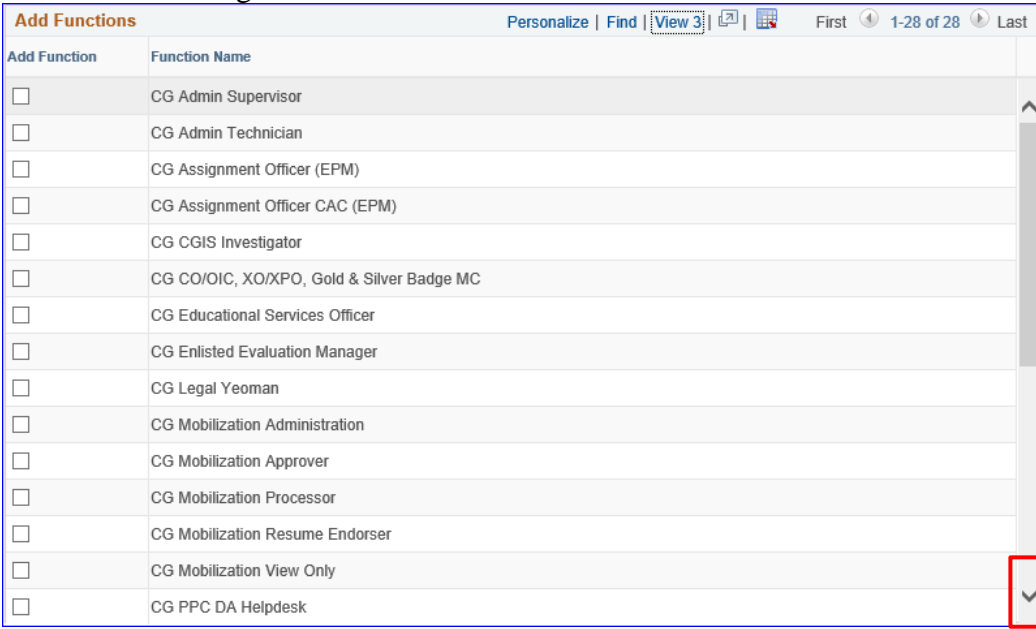
Procedures,
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<p>3</p>	<p>The member's Current Roles and Current Functions (if any) will display. Click View All (if necessary) to see all roles and functions.</p> <p>Note: When members PCS, their roles are reset to Self-Service only.</p> <div data-bbox="341 633 1382 1146" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1367487 Princess Moana</p> <p>Request ID: Request Status:</p> <p>▼ Current Roles Personalize Find View All [Print] [Refresh] First 1-3 of 6 Last</p> <table border="1"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRS</td> <td>Coast Guard HRS/PERSRU</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRSUP</td> <td>HRS Supervisor</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGROWSEC_CGAD</td> <td>CG Active Duty Row Security</td> <td>Role Details</td> </tr> </tbody> </table> <p>▼ Current Functions Personalize Find View All [Print] [Refresh] First 1-2 of 2 Last</p> <table border="1"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG SPO Auditor</td> <td>CG SPO Auditor</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG SPO Technician</td> <td>CG SPO Technician</td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRS	Coast Guard HRS/PERSRU	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRSUP	HRS Supervisor	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGROWSEC_CGAD	CG Active Duty Row Security	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG SPO Auditor	CG SPO Auditor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG SPO Technician	CG SPO Technician															
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<p>4</p>	<p>Review each Function and Role to ensure they are still valid. If the Function or Role is no longer required, select the appropriate Remove Role or Remove Function box.</p> <p>Note: Do not remove/delete the CGROWSEC_CGAD role. It is necessary for your access.</p> <div data-bbox="341 1391 1382 1910" style="border: 1px solid black; padding: 5px;"> <p>▼ Current Roles Personalize Find View All [Print] [Refresh] First 1-6 of 6 Last</p> <table border="1"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRS</td> <td>Coast Guard HRS/PERSRU</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRSUP</td> <td>HRS Supervisor</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGROWSEC_CGAD</td> <td>CG Active Duty Row Security</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSCMD</td> <td>CG Self Service Command</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSMBR</td> <td>CG Self Service Member</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG_CORE_USERS</td> <td>Portal Core User Permissions</td> <td>Role Details</td> </tr> </tbody> </table> <p>▼ Current Functions Personalize Find View All [Print] [Refresh] First 1-2 of 2 Last</p> <table border="1"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG SPO Auditor</td> <td>CG SPO Auditor</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG SPO Technician</td> <td>CG SPO Technician</td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRS	Coast Guard HRS/PERSRU	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRSUP	HRS Supervisor	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGROWSEC_CGAD	CG Active Duty Row Security	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSCMD	CG Self Service Command	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSMBR	CG Self Service Member	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG_CORE_USERS	Portal Core User Permissions	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG SPO Auditor	CG SPO Auditor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG SPO Technician	CG SPO Technician
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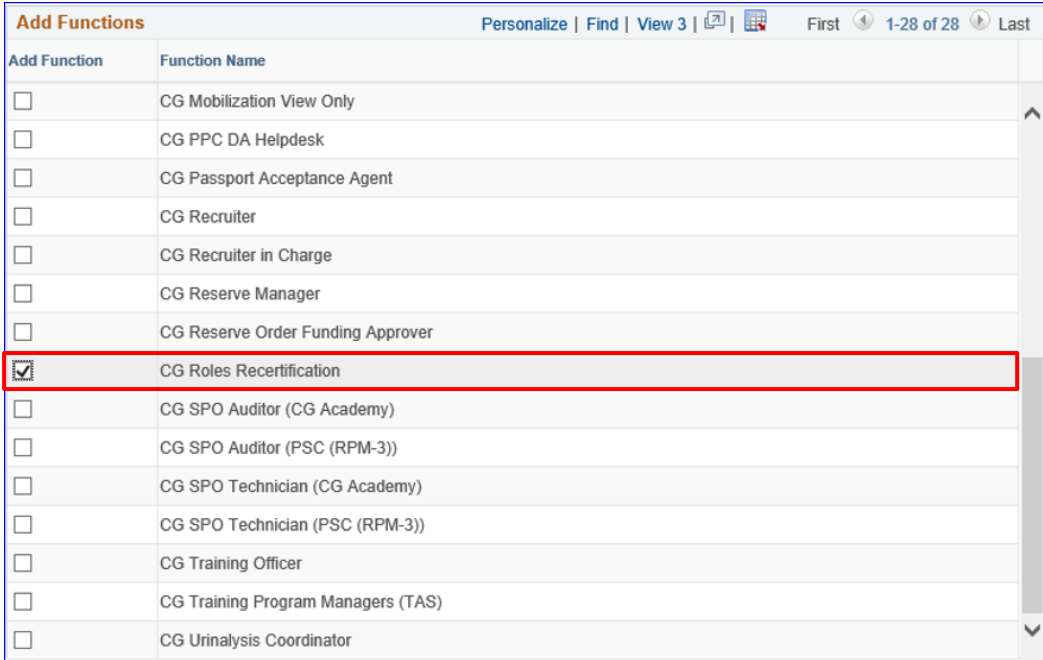
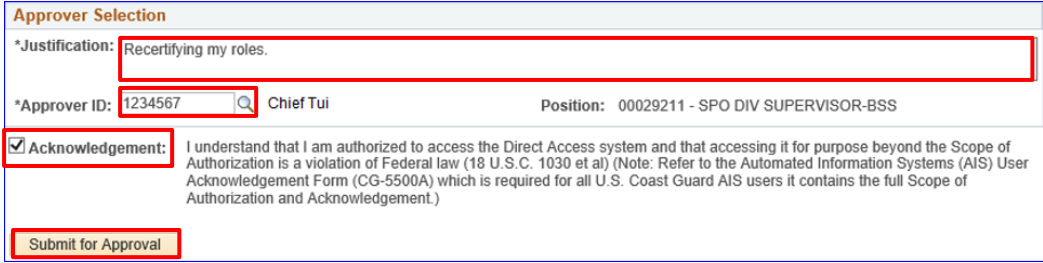
Procedures,
continued

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5	<p>If everything is accurate, click View All in the Add Functions section.</p>  <p>The screenshot shows the 'Add Functions' interface. At the top right, there are buttons for 'Personalize', 'Find', 'View All', and a grid icon. Below these is a table with two columns: 'Add Function' and 'Function Name'. The table contains three rows: 'CG Admin Supervisor', 'CG Admin Technician', and 'CG Assignment Officer (EPM)'. Each row has a checkbox in the 'Add Function' column. The 'View All' button is highlighted with a red box.</p>
6	<p>Scroll down through the list of Functions.</p>  <p>The screenshot shows the 'Add Functions' interface with a scrollable list of functions. The list includes: 'CG Admin Supervisor', 'CG Admin Technician', 'CG Assignment Officer (EPM)', 'CG Assignment Officer CAC (EPM)', 'CG CGIS Investigator', 'CG CO/OIC, XO/XPO, Gold & Silver Badge MC', 'CG Educational Services Officer', 'CG Enlisted Evaluation Manager', 'CG Legal Yeoman', 'CG Mobilization Administration', 'CG Mobilization Approver', 'CG Mobilization Processor', 'CG Mobilization Resume Endorser', 'CG Mobilization View Only', and 'CG PPC DA Helpdesk'. A red box highlights the scroll arrow at the bottom right of the list.</p>

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7	<p>Select the CG Roles Recertification box.</p>  <p>The screenshot shows a table with the following functions:</p> <table border="1"> <thead> <tr> <th>Add Function</th> <th>Function Name</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td>CG Mobilization View Only</td></tr> <tr><td><input type="checkbox"/></td><td>CG PPC DA Helpdesk</td></tr> <tr><td><input type="checkbox"/></td><td>CG Passport Acceptance Agent</td></tr> <tr><td><input type="checkbox"/></td><td>CG Recruiter</td></tr> <tr><td><input type="checkbox"/></td><td>CG Recruiter in Charge</td></tr> <tr><td><input type="checkbox"/></td><td>CG Reserve Manager</td></tr> <tr><td><input type="checkbox"/></td><td>CG Reserve Order Funding Approver</td></tr> <tr style="border: 2px solid red;"><td><input checked="" type="checkbox"/></td><td>CG Roles Recertification</td></tr> <tr><td><input type="checkbox"/></td><td>CG SPO Auditor (CG Academy)</td></tr> <tr><td><input type="checkbox"/></td><td>CG SPO Auditor (PSC (RPM-3))</td></tr> <tr><td><input type="checkbox"/></td><td>CG SPO Technician (CG Academy)</td></tr> <tr><td><input type="checkbox"/></td><td>CG SPO Technician (PSC (RPM-3))</td></tr> <tr><td><input type="checkbox"/></td><td>CG Training Officer</td></tr> <tr><td><input type="checkbox"/></td><td>CG Training Program Managers (TAS)</td></tr> <tr><td><input type="checkbox"/></td><td>CG Urinalysis Coordinator</td></tr> </tbody> </table>	Add Function	Function Name	<input type="checkbox"/>	CG Mobilization View Only	<input type="checkbox"/>	CG PPC DA Helpdesk	<input type="checkbox"/>	CG Passport Acceptance Agent	<input type="checkbox"/>	CG Recruiter	<input type="checkbox"/>	CG Recruiter in Charge	<input type="checkbox"/>	CG Reserve Manager	<input type="checkbox"/>	CG Reserve Order Funding Approver	<input checked="" type="checkbox"/>	CG Roles Recertification	<input type="checkbox"/>	CG SPO Auditor (CG Academy)	<input type="checkbox"/>	CG SPO Auditor (PSC (RPM-3))	<input type="checkbox"/>	CG SPO Technician (CG Academy)	<input type="checkbox"/>	CG SPO Technician (PSC (RPM-3))	<input type="checkbox"/>	CG Training Officer	<input type="checkbox"/>	CG Training Program Managers (TAS)	<input type="checkbox"/>	CG Urinalysis Coordinator
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8	<p>Enter a Justification. Enter the Approver's Emplid or use the Lookup icon to find the Approver ID. Review the statement and check the Acknowledgement box, then click Submit for Approval.</p>  <p>The screenshot shows the following form fields:</p> <ul style="list-style-type: none"> *Justification: Recertifying my roles. *Approver ID: 1234567 (with a search icon) Approver Name: Chief Tui Position: 00029211 - SPO DIV SUPERVISOR-BSS *Acknowledgement: <input checked="" type="checkbox"/> I understand that I am authorized to access the Direct Access system and that accessing it for purpose beyond the Scope of Authorization is a violation of Federal law (18 U.S.C. 1030 et al) (Note: Refer to the Automated Information Systems (AIS) User Acknowledgement Form (CG-5500A) which is required for all U.S. Coast Guard AIS users it contains the full Scope of Authorization and Acknowledgement.) Submit for Approval button 																																
9	<p>Once submitted, a notification email will be sent to the approver. Once they approve it, the request is forwarded to PPC for final approval.</p>																																