Direct Access User Roles and Functions

Overview

Introduction	This guide provides the procedures for **requesting**, **removing**, and **withdrawing** User Roles and Functions in Direct Access (DA). For procedures to **recertify** Roles, see the Recertifying DA User Roles and Functions user guide. **Allow 24 hours after PPC approval to see any requested changes to Roles.**
Direct Access Functional User Roles	DA Functional User Roles are position based. It is important to **review the requirements** of each User Role and Function to ensure all criteria is met, such as appropriate Approval Authority and/or a Designation Letter uploaded with the request. For a list of DA Functional User Roles and the requirements associated with each role, refer to PPC's website at: https://www.dcms.uscg.mil/ppc/da/functionalroles/. The below User Roles require a **Designation Letter** that must be uploaded within the User Role request: • CG Educational Services Officer • CG Passport Acceptance Agent • CG Recruiter in Charge (see "Recruiter in Charge" on next page) • CG Training Officer • CG Urinalysis Coordinator
Pending Requests	It is important to follow up with the Approver. If the User Access Request is not approved within 30 days, **DA will automatically terminate the request and email the submitter to submit a new request**. Once the Approver approves the request, it will be sent to PPC for final approval.
Termination of Roles	If a Command requires termination of User Roles prior to transfer or separation, notify PPC Customer Care. Include the member's Employee ID number and the User Role(s) and Function(s) to be revoked.

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

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

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

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

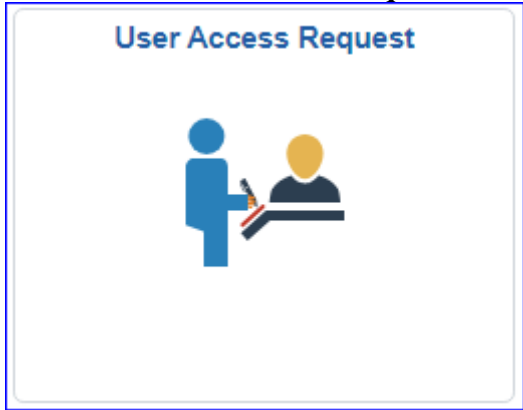**CG Mobilization Resume Endorser:** Provides access to endorse Mobilization resumes.

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

Member: Requesting New User Roles

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

Allow 24 hours after PPC approval to see any requested changes to Roles.

Procedures   See below.

Step	Action
1	Navigate to **Member Self Service** via the drop-down or by page **arrows**.
2	Click on the **User Access Request** tile.

Member: Requesting New User Roles, Continued
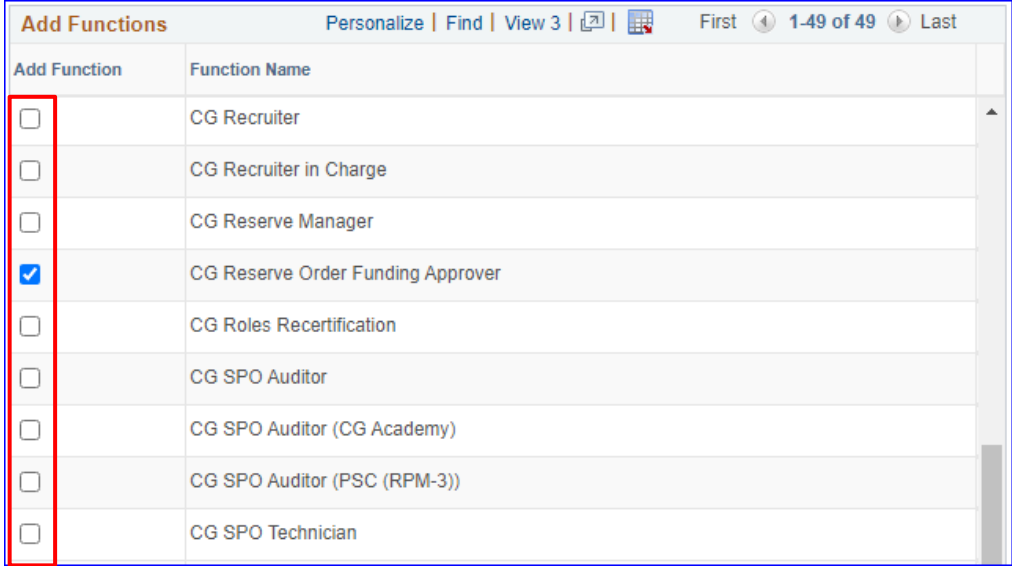
Procedures,
continued

Step	Action
3	The User Access Request page will display. Click **Initiate Request**. **User Access Request** 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. User ID: 1234567 Kaywinnett L. Frye [Initiate Request] 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.
4	Any **Current Roles** and **Current Functions** for the member will display. Click **View All** (if necessary) to view the entire list of Current Roles and Current Functions. **NOTE:** When members PCS, their User Roles are reset to Self Service only. **User Access Request** **Request Details** User Access Request For: 1234567 Kaywinnett L. Frye Request ID: Request Status: ▼ **Current Roles** Personalize | Find | View All | First ◄ 1-3 of 3 ► Last | Keep Role	Remove Role	Role Name	Role Description	Role Details
---	---	---	---	---
☑	☐	CGSSCIV	CG Self Service Civilian	Role Details
☑	☐	CG_SECURITY_ADMIN	CG_SECURITY_ADMIN	Role Details
☑	☐	CG_SS_MBR_RET2	RET2 Member Self Service	Role Details | ▼ **Current Functions** Personalize | Find | View All | First ◄ 1 of 1 ► Last | Function Name	Function Description
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5	Under the **Add Functions** section, click **View All**. **Add Functions** Personalize | Find | View All | First ◄ 1-3 of 40 ► Last 	Add Function	Function Name
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☐	CG Admin Supervisor
☐	CG Admin Technician
☐	CG Assignment Officer (EPM)	

Member: Requesting New User Roles, Continued
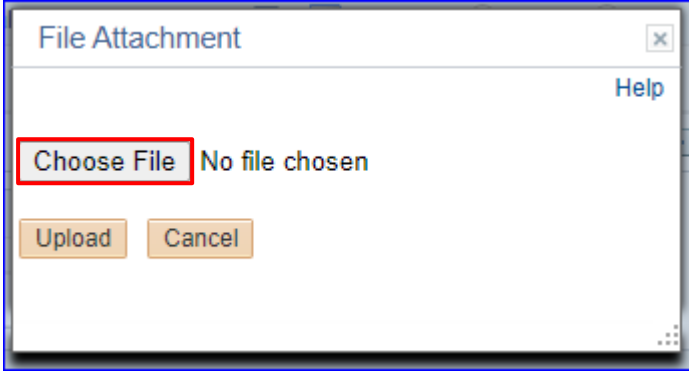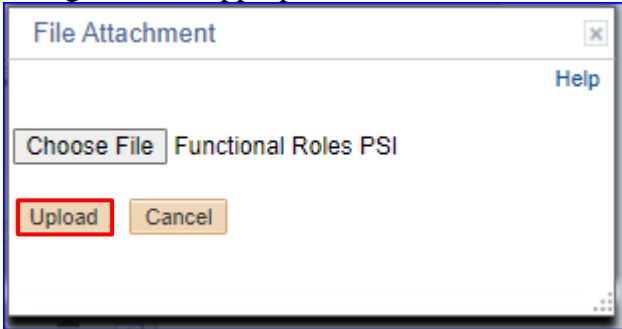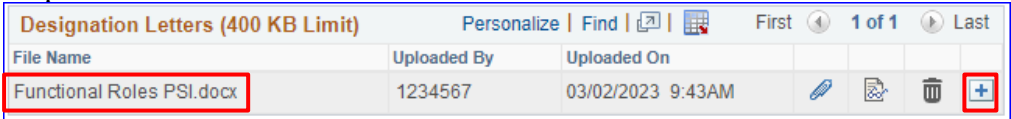
Procedures,
continued

Step	Action
6	Scroll through and **select** the Functions the position requires. **NOTE:** It is important to **review the requirements** of each User Role and Function to ensure all criteria are met, such as appropriate Approval Authority and/or a Designation Memo provided to PPC. See the DA Functional Roles webpage for a list of requirements. **Add Functions** — Personalize | Find | View 3 | 🗗 | 🗒 — First ◀ 1-49 of 49 ▶ Last **Add Function** / **Function Name** ☐ CG Recruiter ☐ CG Recruiter in Charge ☐ CG Reserve Manager ☑ CG Reserve Order Funding Approver ☐ CG Roles Recertification ☐ CG SPO Auditor ☐ CG SPO Auditor (CG Academy) ☐ CG SPO Auditor (PSC (RPM-3)) ☐ CG SPO Technician

Member: Requesting New User Roles, Continued

Procedures, continued

Step	Action
7	If a specific User Role or Function is not listed: under **Add Roles**, use the **Lookup** to locate the **Role Name**, then select the appropriate role. Click the **(+)** button to add additional Roles as appropriate.
8	If a role requires a Designation Letter, you must add it to the request, otherwise you will get an error. Click the **Add Attachment** icon.

Member: Requesting New User Roles, Continued
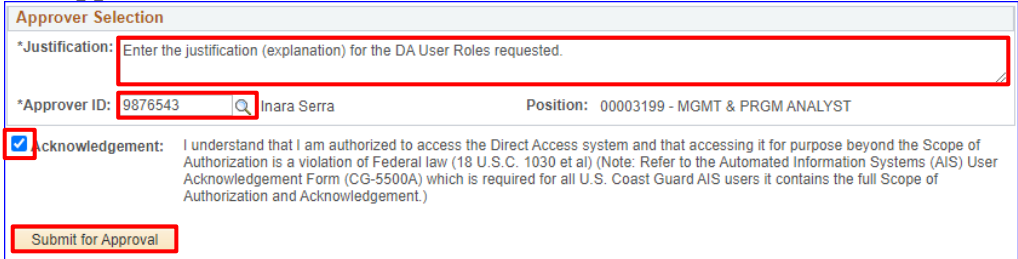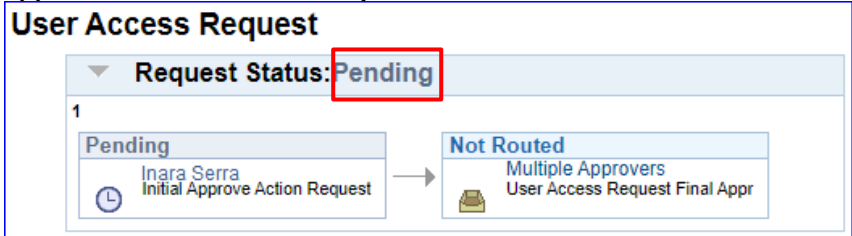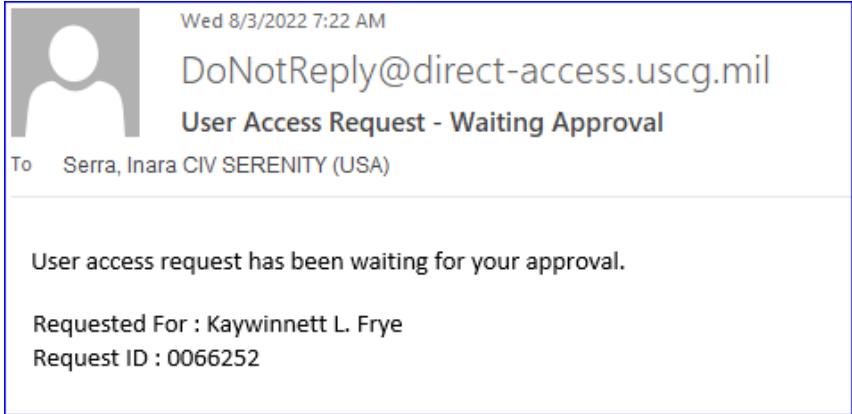
Procedures,
continued

Step	Action
9	Click **Choose File.** **NOTE:** The document cannot be in Excel and it cannot exceed 400 KB. File Attachment Help Choose File No file chosen Upload Cancel
10	Navigate to the appropriate document/file and select it. Click **Upload**. File Attachment Help Choose File Functional Roles PSI Upload Cancel
11	The uploaded **File Name** will display. If more Designation Letters are required, click the **Plus** button and repeat Steps 7-9, otherwise continue to Step 11. Designation Letters (400 KB Limit) Personalize | Find | 🔼 | 📊 First ◀ 1 of 1 ▶ Last File Name | Uploaded By | Uploaded On Functional Roles PSI.docx | 1234567 | 03/02/2023 9:43AM 📎 📄 🗑 ➕

Member: Requesting New User Roles, Continued

Procedures,
continued

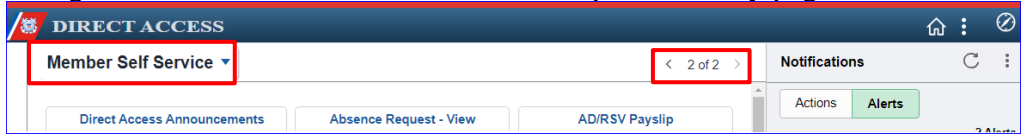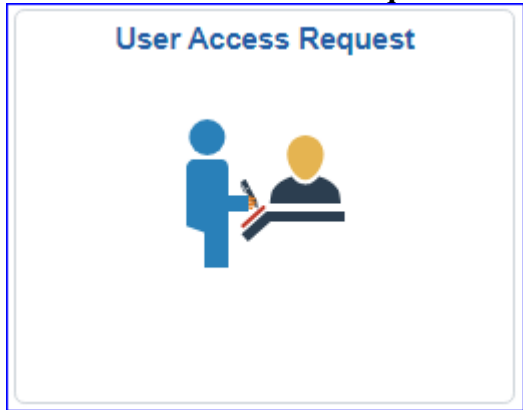| Step	Action
12	In the Approver Section, enter the **Justification** for requesting the User Role(s)/Function(s) (required). Enter the **Approver ID** (approver's Employee ID number) or use the Lookup to locate the approver's Employee ID number. Review the statement and check the **Acknowledgement** box. Click **Submit for Approval**.
13	Once submitted, the request will be placed in a Pending status and email notification will be sent to the Approver. It is important to follow up with the Approver. If the User Roles request is **not approved within 30 days of submission, DA will automatically terminate the request** and email the submitter to submit a new request. **NOTE:** Once the Approver approves the request, it will be sent to PPC for final approval. The submitter will receive email notification upon final approval or denial of the request.

Removing User Roles

Introduction

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

Allow 24 hours after PPC approval to see any requested changes to Roles.

Termination of Roles

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

Procedures

See below.

Step	Action
1	Navigate to **Member Self Service** via the drop-down or by page **arrows**.
2	Click on the **User Access Request** tile.

Removing User Roles, Continued

Procedures,
continued

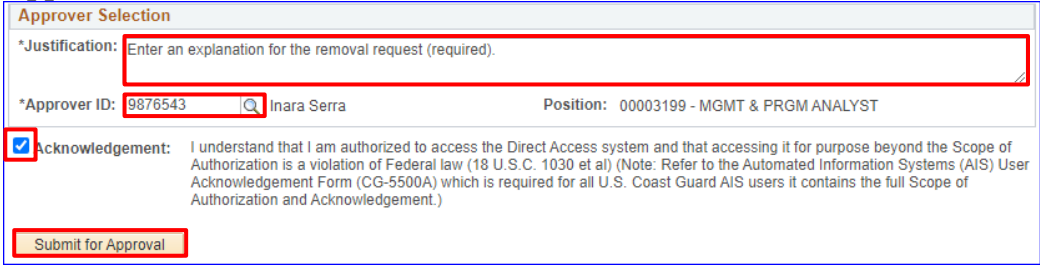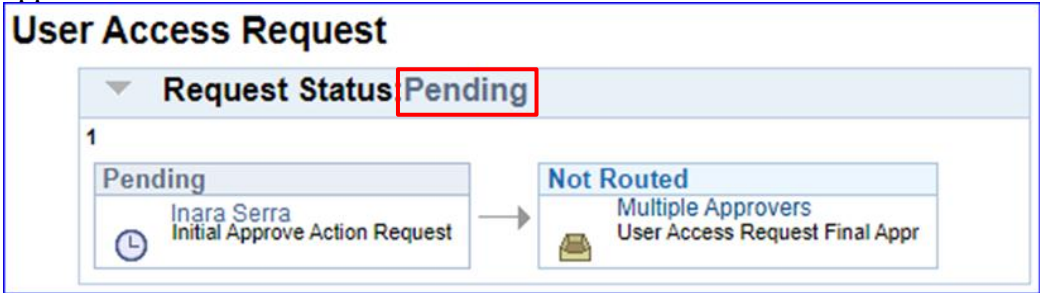| Step	Action
3	The User Access Request page will display. Click **Initiate Request**. **User Access Request** This page is used to request user access to the Direct Access system. This page can be used to add additional roles or delete existing roles. The request must be approved by appropriate authority. User ID: 1234567 Hoban Washburne [Initiate Request] 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.
4	Any **Current Roles** and **Current Functions** for the member will display. Click **View All** (if necessary) to view the entire list of Current Roles and Current Functions. **User Access Request** **Request Details** User Access Request For: 1234567 Hoban Washburne Request ID: Request Status: **Current Roles** Personalize | Find View All First 1-3 of 6 Last 	Keep Role	Remove Role	Role Name	Role Description	Role Details
---	---	---	---	---
☑	☐	CGFIELDADM	Unit ADMIN access to limted HR	Role Details
☑	☐	CGHRS	Coast Guard HRS/PERSRU	Role Details
☑	☐	CGHRSVW	HRS/PERSRU Display Only	Role Details | **Current Functions** Personalize | Find View All First 1 of 1 Last | Keep Function	Remove Function	Function Name	Function Description
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☑	☐	CG SPO Technician	CG SPO Technician	 Add Functions Personalize | Find | View All First 1-3 of 48 Last

Removing User Roles, Continued

Procedures,
continued

Step	Action
5	Check the **Remove Role** box for each Role and/or Function to be removed. **DO NOT REMOVE THE CGROWSEC_CGAD ROLE**. **NOTE:** For information on adding User Roles and Functions, see the Requesting New User Roles section. User Access Request Request Details User Access Request For: 1234567 Hoban Washburne Request ID: Request Status: ▼ Current Roles Personalize | Find | View 3 | ⤢ | ▦ First ◀ 1-6 of 6 ▶ Last 	Keep Role	Remove Role	Role Name	Role Description	Role Details
---	---	---	---	---
☑	☐	CGFIELDADM	Unit ADMIN access to limted HR	Role Details
☐	☑	CGHRS	Coast Guard HRS/PERSRU	Role Details
☑	☐	CGHRSVW	HRS/PERSRU Display Only	Role Details
☑	☐	CGROWSEC_CGAD	CG Active Duty Row Security	Role Details
☑	☐	CGSSCMD	CG Self Service Command	Role Details
☑	☐	CGSSMBR	CG Self Service Member	Role Details | ▼ Current Functions Personalize | Find | View All | ⤢ | ▦ First ◀ 1 of 1 ▶ Last | Keep Function	Remove Function	Function Name	Function Description
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☐	☑	CG SPO Technician	CG SPO Technician	 Add Functions Personalize | Find | View All | ⤢ | ▦ First ◀ 1-3 of 48 ▶ Last

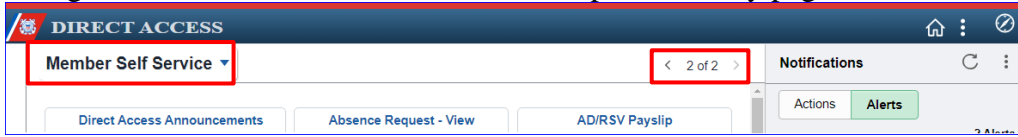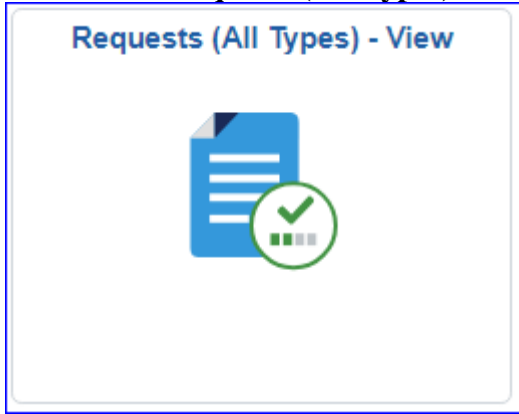# Removing User Roles, Continued

Procedures, continued

Step	Action
6	Scroll to the bottom of the page and enter the **Justification** for removing the User Role/Function (required). Enter the **Approver ID** (approver's Employee ID number) or use the Lookup to locate the approver's Employee ID number. Review the statement and check the **Acknowledgement** box. Click **Submit for Approval**.
7	Once submitted, the request will be placed in a **Pending** status and email notification will be sent to the Approver. It is important to follow up with the Approver. If the User Access Request is **not approved within 30 days, DA will automatically terminate the request** and email the submitted to submit a new request. **NOTE:** Once the Approver approves the request, it will be sent to PPC for final approval.

Member: Withdrawing a User Roles Request

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

Procedures   See below.

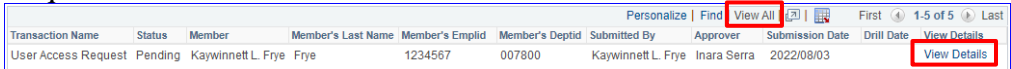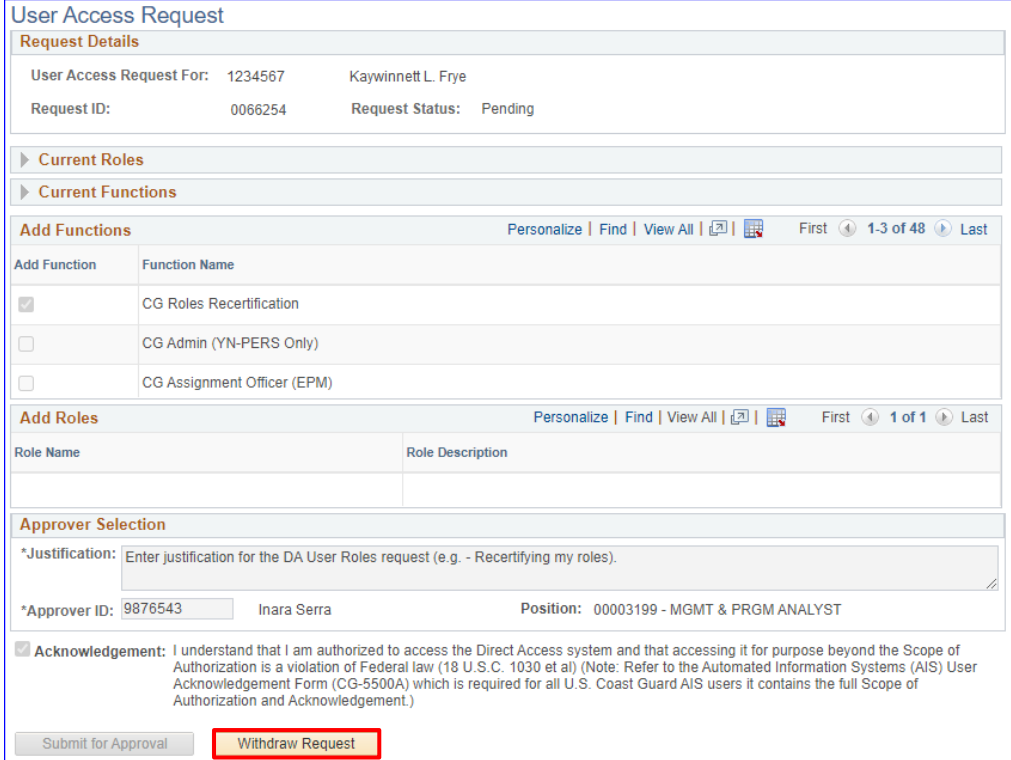| Step	Action
1	Navigate to **Member Self Service** via the drop-down or by page **arrows**.
2	Click on the **Requests (All Types) - View** tile.

Member: Withdrawing a User Roles Request, Continued

Procedures,
continued

Step	Action
3	The View My Action Requests page will display. Ensure the **My Submitted Requests** button is selected. The **Transaction Name** will default to All Transactions and the **Transaction Status** will default to Pending. Click **Populate Grid**. View My Action Requests Kaywinnett L. Frye 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]

Member: Withdrawing a User Roles Request, Continued

Procedures, continued

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