

# FEDHR NAVIGATOR HUMAN RESOURCES REQUEST/CASE TRACKER SUPERVISOR GUIDE

DHS-USCG

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Changes

<b>Date</b>	<b>Description of changes</b>	<b>pages</b>
<b>5/23/17</b>	<b>Updated Links to New CG-1 Webpage &amp; associated documents/grammatical edits</b>	<b>Throughout guide</b>



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## Section 1 – General Information

The Civilian Human Resources Case Management System (FedHR Navigator or FedHR) deployment started in September 2015 with pilot testing focused on usability, customer acceptance, and standardization of processes for case initiation and workflow. Feedback from the pilot deployment was used to establish the [deployment plan](#).

The deployment of FedHR is a significant step forward for the overall management of our civilian human resources system and is in alignment with the Office of Civilian Human Resources (CG-121) initiatives to:

- Standardize the submission and routing of requests submitted to CG-121
- Provide greater transparency of personnel action, recruitment, and classification status
- Improve collaboration between supervisors, civilian resource coordinators (CRCs), and Human Resources (HR)
- Provide stakeholders with easy-to-use reporting capabilities
- Reduce paperwork

Effective June 15, 2017, supervisors of civilian employees will begin submitting personnel, recruitment, and classification requests using FedHR Navigator. The application provides supervisors the ability to:

- Electronically initiate/authorize, digitally sign, and route personnel actions (SF-52s), recruitment requests, and classification requests
- Track workflow routing status
- View case history, generate reports, and receive case notifications.

NOTE: Submission procedures for human resources requests published or distributed prior to 15 Jun 17 referencing submission to AskHR are no longer valid. Please refer to CG121 Portal and webpage for updated guidance (AncHRs and human resources manuals). AskHR helpdesk (uscg.AskHR@uscg.mil) is still available to answer questions.

### 1.1. System Information

FedHR supports and automates strategic Federal human resources functions. Position management and classification, recruiting, hiring and on-boarding are integrated in a single platform to accelerate and streamline the process, while fully supporting human capital initiatives.

FedHR is provided by the cloud service provider (CSP): Economic Systems Inc. (EconSys) and approved by the Federal Risk and Authorization Management Program (FedRAMP). FedRAMP was developed in collaboration with the National Institute of Standards and Technology (NIST), the General Services Administration (GSA), the Department of Defense (DOD), and the Department of Homeland Security (DHS). FedRAMP is a Government-wide program that



provides a standardized approach to security assessment, authorization, and continuous monitoring for cloud-based services.

FedHR enables security authorization using the (PIV and Multi layered authentication), is Federal Information Security Management Act (FISMA) compliant (based on the NIST 800-53), and meets Federal Government Requirements and complies with OPM, DHS and USCG policy and regulations, as well as the requirements of publications identified in USCG PWS section 6.0.

## 1.2. Role Management/Role Requests

Access to the Supervisor Role in FedHR will be granted to civilian and military supervisors of civilian personnel. Prior to receiving access, the supervisory responsibilities must be request via submission of the role request form and the requestor's supervisory responsibilities will be verified by the 2<sup>nd</sup> line supervisor. The Role Request Form is required to be filled out when supervisors are assigned for the first time to a supervisory position, transferring to another supervisory position, or separating from USCG. We have also included a field for CRCs on the form to request changes when they receive a new assignment or are separating.

The Role Request Form is available from the CG-121 webpage:

<https://cg.portal.uscg.mil/units/cg121/Lists/WebTARoleApplication/NewForm.aspx?RootFolder>

## 1.3. FedHR Security Features

- Time Out – FedHR will time out after 30 minutes of inactivity
- Audit Log – updates to include names and dates associated for changes made on SF-52
- Personally identifiable information - masked on SF-52 from Supervisor and CRC roles (date of birth and SSN not visible)

## 1.4. Feedback and Contact Information

Please work with your servicing HR Specialist for inquiries on FedHR cases and suggestions for process or system changes. The name of the HR Specialist assigned to each case will be located in the case history in FedHR.

Contact the FedHR Navigator System Administrator, Donna Basey ([Donna.Basey@uscg.mil](mailto:Donna.Basey@uscg.mil)), if you have questions or suggestions regarding the FedHR application, reports, role administration, or user guides. You may also contact "AskHR" ([uscg.AskHR@uscg.mil](mailto:uscg.AskHR@uscg.mil)) if you need assistance. We are working with the vendor for systems upgrades and changes to enhance the user experience.

Please contact your servicing [HR Specialist](#) if you have any questions about specific HR case related information. Contact information is located on the USCG CG-121 website: (<http://www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-Human-Resources-CG-1/Civilian-Human-Resources-Diversity-and-Leadership-Directorate-CG-12/Civilian-HR/>)





## 1.5. Rules of Behavior

### FHR Navigator Rules of Behavior for Agency Application Users

Revised October 1, 2012

You must conduct only authorized business on the system.

Your level of access to systems owned by Economic Systems Inc. is limited to ensure your access is no more than necessary to perform your legitimate tasks or assigned duties. If you believe you are being granted access that you should not have, you must immediately notify the Economic Systems Support Desk, support@econsys.com.

You must maintain the confidentiality of your authentication credentials such as your password. Do not reveal your authentication credentials to anyone; an Economic Systems employee should never ask you to reveal them.

You must follow proper login/logout procedures. You must manually login to your session; do not store your password locally on your system or utilize any automated login capabilities. You must promptly logout when session access is no longer needed. If a logout function is unavailable, you must close your browser. Never leave your computer unattended while logged into the system.

You must report all security incidents or suspected incidents (e.g., lost passwords, improper or suspicious acts) to your agency's Information System Security Officer (ISSO).

You must not establish any unauthorized interfaces between systems, networks, and applications owned by Economic Systems Inc.

Your access to systems and networks owned by Economic Systems is governed by, and subject to, all Federal laws, including, but not limited to, the Privacy Act, 5 U.S.C. 552a, if the applicable Economic Systems' system maintains individual Privacy Act information. Your access to Economic Systems FHR Navigator constitutes your consent to the retrieval and disclosure of the information within the scope of your authorized access, subject to the Privacy Act, and applicable State and Federal laws.

You must safeguard system resources against waste, loss, abuse, unauthorized use or disclosure, and misappropriation.

You must not process U.S. classified national security information on the system.

You must not browse, search or reveal information hosted by Economic Systems except in accordance with that which is required to perform your legitimate tasks or assigned duties.

You must not retrieve information, or in any other way disclose information, for someone who does not have authority to access that information.

You must ensure that Web browsers use Secure Socket Layer (SSL) version 3.0 (or higher) and Transport Layer Security (TLS) 1.0 (or higher). SSL and TLS must use a minimum of 256-bit encryption.

You must ensure that your web browser is configured to warn about invalid site certificates.

You must ensure that web browsers warn if the user is changing between secure and non-secure mode.

You must ensure that your web browser checks for a publisher's certificate revocation.

You must ensure that your web browser checks for server certificate revocation.

You must ensure that web browser checks for signatures on downloaded files.

By your signature or electronic acceptance (such as by clicking an acceptance button on the screen) you must agree to these rules.

You understand that any person who obtains information from a computer connected to the Internet in violation of her employer's computer-use restrictions is in violation of the Computer Fraud and Abuse Act.

You agree to contact your agency's Information System Security Officer (ISSO) if you do not understand any of these rules.

[Print](#)

[I agree and accept these rules of behavior](#)

[I do not agree to these rules of behavior](#)

During the first time log in process you will be asked to agree to the rules of behavior for agency applicant users. You must make a selection before you can enter the application. You have the option to print before you make your selection that you agree or disagree. By clicking I agree, you are digitally signing that you agree with these rules of behavior. A copy of the rules in effect at the time of the supervisor roles implementation is located in Appendix 10 of this guide.



## Section 2 - Navigating Within FedHR

### 2.1. Logging in for the First Time

1. Visit <https://fhrnavigator.com/client/USCG> (NOTE: Bookmark the site)
2. Click the “Username and Password” tab

**Login**

PIV Card or CAC    **Username and Password**

**Important:** Starting 1/26/2015, the login process using username and password is changing to strengthen security. [More information >](#)

Please enter your username and password.

**Username**

**Password**

**My Agency**

[Register >](#)  
[Reset User Account >](#)

By clicking on the **Login** button, you **acknowledge** that you have read the [general privacy act notice](#) and [licensing agreement](#).

**Login**

[Bookmark this website](#)

After selecting “Register” a screen will appear with the prompt for a validation code. The validation code will be forwarded to the e-mail address in your account profile. Expect a 10 to 20 minute delay for the e-mail to be delivered.

**FedHR Navigator**

**Please Verify Your Email Address**

Your e-mail address must be verified before proceeding to use the system. An e-mail containing a unique code was sent to [donna.basey@uscg.mil](mailto:donna.basey@uscg.mil)

Please check the e-mail inbox for the code and enter it below.

Enter the code:  **Validate Code**


If you do not receive the email with the validation code...

1. Check that your email address is correct. If [donna.basey@uscg.mil](mailto:donna.basey@uscg.mil) is not your current e-mail address or if you'd like to change it, you will need contact your FHR Navigator User Account Administrator.
2. Check your spam or junkmail folder.
3. If the above two options do not work, contact your agency's IT support to find out why you are unable to receive emails from FHR Navigator. You may also email the FHR Navigator support team at [support@uscgnavs.com](mailto:support@uscgnavs.com).

If you do not receive the e-mail:

- a. Check to ensure it was not delivered to your MS Outlook Junk Folder;
- b. If not in Junk folder and not received within 20 minutes contact [USCG.ASKHR@USCG.Mil](mailto:USCG.ASKHR@USCG.Mil) to notify the system administrator of the issue.



FedHR Navigator  Resize text: [A](#) [A](#) [A](#)

### Step 2: Update profile Information

You can use this screen to get your username, reset your password, update your email address , or update your cell phone number .  
Click on each tab to edit each part of your account.

**Username** Password E-mail address Phone number

Enter a username to access FHR Navigator and click Update.

Enter desired username   
The new username must be a minimum of 6 and a maximum of 20 characters.


Confirm username

Username is updated successfully!

[Update Username](#) [Next](#)

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## 2.2. Create New Password

FedHR Navigator  Resize text: [A](#) [A](#) [A](#)

### Step 2: Update profile Information

You can use this screen to get your username, reset your password, update your email address , or update your cell phone number .  
Click on each tab to edit each part of your account.

**Username** Password E-mail address Phone number

Please enter a password and click Update.

Enter new password   
The new password must be a minimum of 12 and a maximum of 20 characters and meet all four of the following security conditions:  
1. It must contain at least two uppercase letters. (Example: ABC)  
2. It must contain at least two lowercase letters. (Example: abc)  
3. It must contain at least two numeric values. (Example: 123)  
4. It must contain at least two non-alphanumeric special characters. (Examples: !@#\$%^&\*()\_+<>{ } , ; : ? )

Confirm new password

[Update password](#) [Next](#)

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Password must be a minimum of 12 and a maximum of 20 characters and meet all four of the following security conditions:

It must contain at least two uppercase letters;

It must contain at least two lowercase letters;

It must contain at least two numeric values;

It must contain at least two non-alphanumeric special characters



Resize text: [A](#) [A](#) [A](#)

### Step 2: Update profile Information

You can use this screen to get your username, reset your password, update your email address , or update your cell phone number .

Click on each tab to edit each part of your account.

Username	Password	E-mail address	Phone number
Please enter a password and click Update.			
Enter new password <input type="password"/>			
<small>The new password must be a minimum of 12 and a maximum of 20 characters and meet all four of the following security conditions:</small>			
<small>1. It must contain at least two uppercase letters. (Example: ABC)</small>			
<small>2. It must contain at least two lowercase letters. (Example: abc)</small>			
<small>3. It must contain at least two numeric values. (Example: 123)</small>			
<small>4. It must contain at least two non-alphanumeric special characters. (Examples: !@#\$%^&amp;*()_+-=&lt;&gt;[{}~ ?])</small>			
Confirm new password <input type="password"/>			
<input type="button" value="Update password"/> <input type="button" value="Next"/>			

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Once the validation for security conditions is complete,

- click update password
- click next

## 2.3. Update or verifying E-mail Address



Resize text: [A](#) [A](#) [A](#)

### Step 2: Update profile Information

You can use this screen to get your username, reset your password, update your email address , or update your cell phone number .

Click on each tab to edit each part of your account.

Username	Password	E-mail address	Phone number
Your email address on record is <b>donna.bassey@uscg.mil</b>			
If you'd like to change it, enter the new e-mail address and click Update.			
New e-mail address <input type="text"/>			
Confirm e-mail address <input type="text"/>			
<input type="button" value="Update e-mail address"/> <input type="button" value="Next"/>			

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If e-mail address showing is not correct:

- type corrected e-mail address and confirm in the fields provided
- click update e-mail address
- click next to continue validation process



## 2.4. Update or verifying Cell Phone Number

**FedHR Navigator**  Resize text: [A](#) [A](#) [A](#)

**Step 2: Update profile Information**

You can use this screen to get your username, reset your password, update your email address , or update your cell phone number .

**Click on each tab to edit each part of your account.**

Username Password E-mail address **Phone number**

Please enter your cell phone number and click Update

Cell phone number +1

Confirm cell phone number +1

By clicking "Update phone number", you agree to receive text messages generated by FHR Navigator. By receiving text messages, you may incur charges. Check with your cell phone carrier to determine what fees or charges may apply.

[Update phone number](#) [Done](#)

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Cell phone number is required when requesting a password reset. Verification codes will be forwarded to this number upon a request for password assistance or to authenticate user when attempting to access FedHR Navigator without using CAC.

- Input and confirm the cell phone number that can receive texts
- Click Update phone number
- Click Done

You will be brought out of FedHR to a screen that requests that you close your browser window.



You must navigate back to the login screen if you are ready to initiate, review or take action on cases. You must register your PIV/CAC to use it as your credentials at the login screen instead of entering the Username and Password each time you use FedHR. The instructions are provided in the next section.

Some 1<sup>st</sup> time users will not have their PIV/CAC yet and will have to continue to log in with the Username and password until the PIV/CAC is received and Registered.



## 2.5. Registering PIV/CAC

Registering the PIV/CAC is required one time only. After registration, you will not need to use your username and password to log into FedHR but that option will still be available to you.

1. Open your Internet Explorer. Enter the web site: (<https://fhnavigator.com/client/USCG>)
2. Activate the Username and Password tab from the login screen. (shown below)
3. Ensure the PIV/CAC is inserted in the computer slot before clicking on the hyperlink labeled Register.
4. When prompted, select your credential (signature) and enter your PIV/CAC Pin.

The screenshot shows the "Login" page of the FedHR Navigator. At the top, there are two tabs: "PIV Card or CAC" and "Username and Password". The "Username and Password" tab is selected. Below the tabs, there is an "Important" notice stating that starting 1/26/2015, the login process using username and password is changing to strengthen security, with a link to "More information". Below this, a prompt asks the user to "Please enter your username and password." There are three input fields: "Username", "Password", and "My Agency" (which is pre-filled with "United States Coast Guard"). Below the input fields, there are two links: "Register >" and "Reset User Account >". These two links are circled in red. Below the links, there is a disclaimer: "By clicking on the Login button, you acknowledge that you have read the general privacy act notice and licensing agreement." At the bottom, there is a "Login" button and a "Bookmark this website" link.

## 2.6. Reset User Account

If you forgot your Username or password, select “Reset User Account” to reset (circled in red above). You will be prompted to answer questions and to create a new password.



## 2.7. Logging in with CAC/PIV

1. Open your Internet Explorer. Enter the web site: <https://fhrnavigator.com/client/USCG>
2. Click “OK” on the Notice and Consent banner page. This will take you to the FedHR Navigator Portal window.
3. If you previously logged in with temporary access while waiting for your PIV/CAC, you should activate the Username and Password tab then select “Register”
4. Make sure the PIV Card or CAC tab active (it will be highlighted in blue).
5. You should then receive a window that contains your CAC certificates. Make sure you select the certificate that is not your E-Mail certificate. Enter your PIV/CAC.

The login page features the FedHR Navigator logo and the U.S. Coast Guard seal. A blue banner says "Welcome, please log in." Below is a "Login" section with two tabs: "PIV Card or CAC" (active) and "Username and Password". The PIV tab shows a sample card for Jane C. Doe and instructions to plug the card into a reader. A "Login" button is at the bottom. A note mentions acknowledging the privacy act notice and licensing agreement.

Note: To log in for the 1<sup>st</sup> time with PIV/CAC click on the Username and Password tab and Select Register.

## 2.8. FedHR Navigator Page Banner

The FedHR Navigator Banner is viewable from any page within FedHR. The banner provides the option to change roles, change the text size, search for an employee and log out



### 2.8(a) Supervisor Home Page; Resize Text

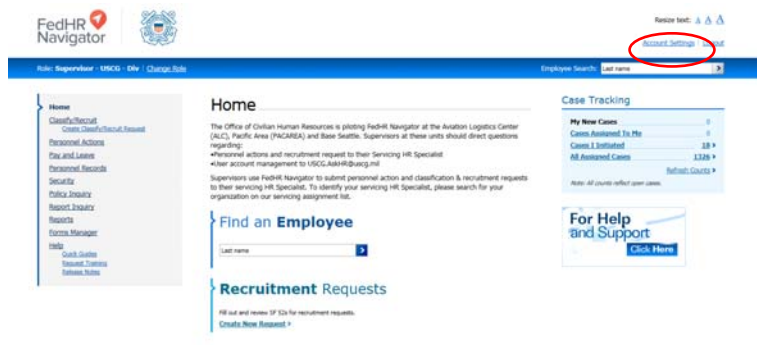


Navigation Menu – Resize Text  
Selecting options from Resize Text will increase or decrease the screen display in relation to the size of the “A” that you select, small, medium or large





## 2.8(b) Account Settings: Change Password



Follow the request to fill in your password information. Select 'Update Password' to save the password or 'Cancel' to return to previous screen.

Passwords must meet the FedHR security validation criteria (provided below).

Password must be a minimum of 12 and a maximum of 20 characters and meet all four of the following security conditions:

- It must contain at least two uppercase letters;
- It must contain at least two lowercase letters;
- It must contain at least two numeric values;
- It must contain at least two non-alphanumeric special characters

### Change Password

This screen allows you to change the password used to access the Federal Human Resources Navigator system. Please change your password by

The new password must be a minimum of 12 and a maximum of 20 characters and meet all four of the following security conditions:

1. It must contain at least two uppercase letters. (Example: ABC)
2. It must contain at least two lowercase letters. (Example: abc)
3. It must contain at least two numeric values. (Example: 123)
4. It must contain at least two non-alphanumeric special characters. (Examples: !@#\$%^&\*()~+\_-<>{ } . : ; [ ] )

Type in your **current** password:

Type in your **new** password:

Verify your **new** password:

**Update Password** **Cancel**

### Account Settings – Change Password

To change your password select Account Settings at the top of your screen.

This option is available from any page in FedHR.

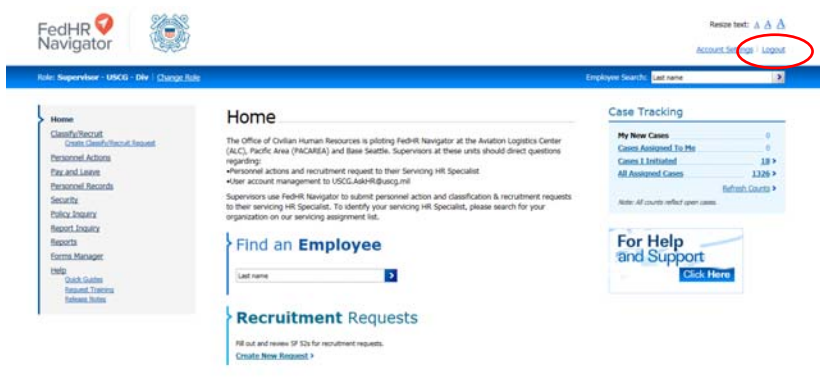




## 2.8(c) Search for Employee



## 2.8(d) How to Exit from FEDHR



To logout of FedHR, select the link at the top of the screen.

This option is available from any page in FedHR.

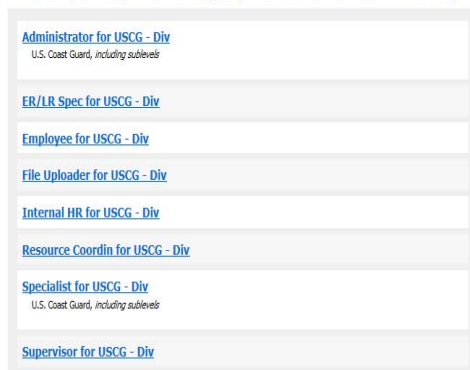
## 2.8(e) Changing Roles between Employee and Supervisor

Civilian supervisors will have more than one “role” responsibility. If you have more than one “role” assigned to your user ID, you can switch between the roles by selecting “Change Role” in the blue tool bar under the FedHR Navigator header.



### Select a Role

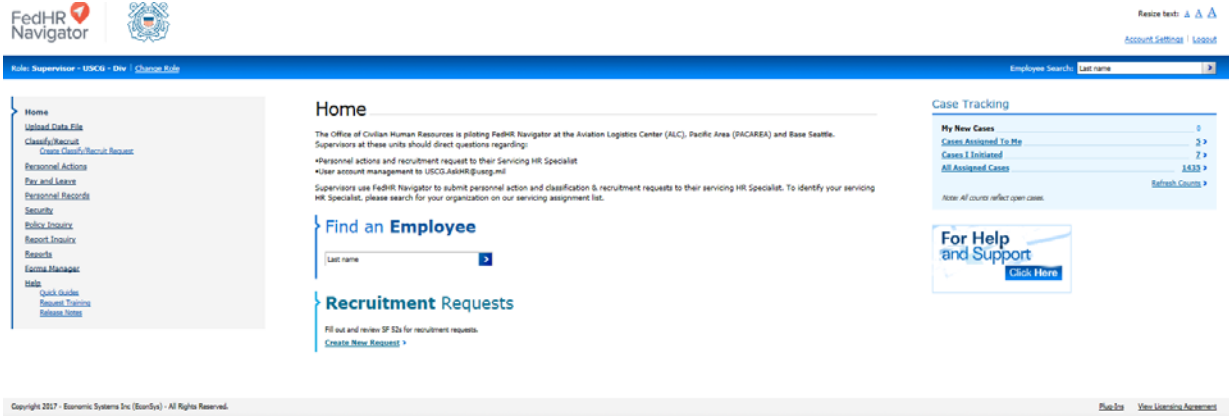
You have multiple roles assigned in the FHR Navigator system. Please select the desired role. You can change the role later by selecting "Change Role" from the top menu bar.



Note: Military Supervisors of civilian personnel will only have the “supervisor” role assigned to them; therefore, the first screen that will open is the supervisor “Home” screen.



## 2.9. Supervisor Home Page



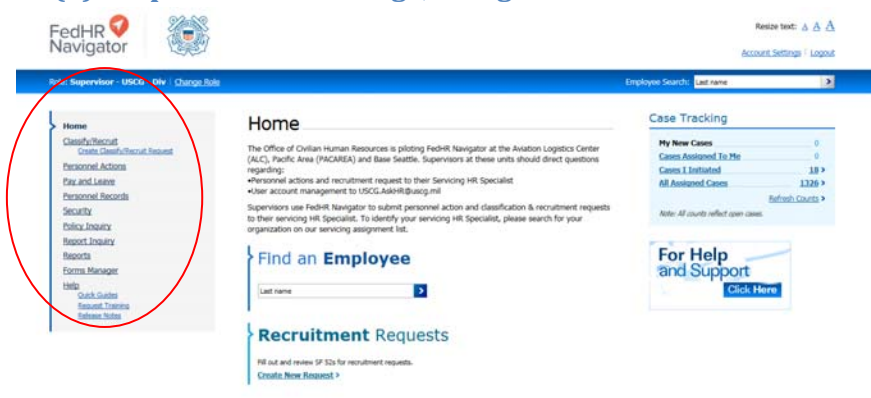
The sections of the Supervisor Home Page include:

- (a) Home Page Notices (top center)
- (b) Navigation Menu (Left)
- (c) Case Tracking Section (Right)
- (d) Find an Employee search field (center)
- (e) Recruitment Requests Link to Initiate (this hyperlink will also initiate classification requests)
- (f) For Help and Support – Please do not use this link, it will generate an e-mail to the EconSys vendor. We prefer that you contact the AskHR Helpdesk ([uscg.ASKHR@uscg.mil](mailto:uscg.ASKHR@uscg.mil)) for assistance.

### 2.9(a) Home Page Notices:

The information on the Supervisor Home Page is updated by the FedHR administrator and is intended to provide you with current information (such as the location of references and guides) and any changes related to FedHR and Civilian Personnel.

### 2.9(b) - Supervisor Home Page; Navigation Menu



#### Navigation Menu - Case Types

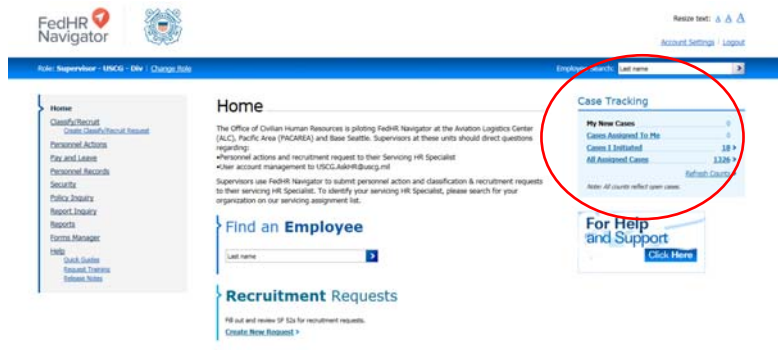
- Classify/Recruit Request
- Pay and Leave
- Personnel Action
- Security
- Policy Inquiry
- Report Inquiry
- Reports
- Help

Additional information on the case types within the navigation menu is provided in the sections of the guide which correspond with the case type labels. Refer to the appendices for associated tables for activities and Detail/Step descriptions available for each case type.



[Note: The user guides available from the Help section of the navigation menu do not reflect customized features created for the USCG. The guides available on CG121 portal/website page will reflect the USCG custom features and processes)

## 2.9(c) Supervisor Home Page; Case Tracking



### Navigation Menu – Case Tracking

Provides view to workflow and case history information.

- Cases Assigned to Me
- Cases I Initiated
- All Assigned Cases

Refer to Section 4 for more information on Case Tracking, workflow, and reassigning cases.

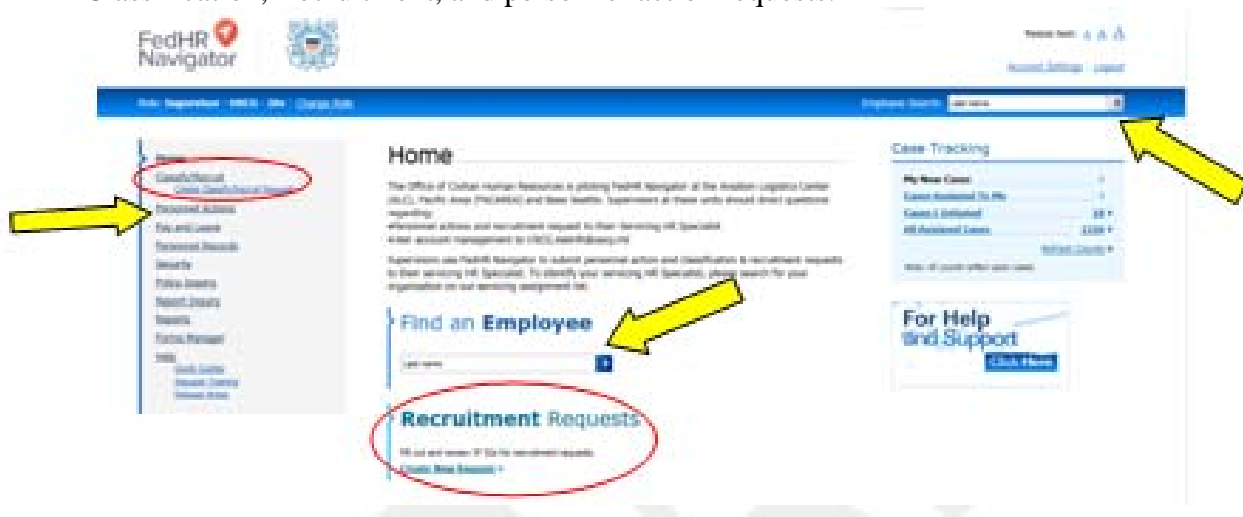


## Section 3 - Initiating and Managing Requests

### 3.1. Introduction

FedHR generates an interactive electronic SF-52 form that automates the creating, editing, approving, coordinating, and tracking of personnel actions. It provides a single, integrated process to supervisors, managers, and HR personnel to manage personnel actions electronically, coordinate to the appropriate officials, and provide reports.

This section of the guide explains how to use FedHR Navigator to automated SF-52s to initiate Classification, Recruitment, and personnel action requests.



There are alternate ways to create cases depending on the case type you are initiating. Classification and Recruitment can be initiated 2 ways (circled in red above);

1. click the hyperlink bottom center of supervisor homepage;
2. or click the hyperlink in the navigation menu

Personnel Action Requests and Pay and Leave cases can be created by (identified by the arrows above) :

1. using the navigation menu (left side of the screen); or
2. searching the employee name in either of the 2 search fields provided on the home page.



## 3.2. Outline of Steps for Managing FedHR Cases

### *I. Initiating a Request/Case - Steps*

- a. Log in and select a role
- b. Create a request
- c. Fill out the form and save
- d. Open SF-52 and e-sign it before saving
- e. Update detail/step
- f. Select distribution for e-mail notifications
- g. Attach supporting documentation
- h. Reassign to the next person in the process (updates owner information & generates the e-mail notifications)

### *II. Editing a Request/Case – Steps*

If you are the recipient of a case for which you need to take action (e.g., approve, e-sign):

- a. Log in and select a role
- b. Search for the request through case tracking (details in Section Two)
- c. Make changes to the form, if necessary
- d. Open, e-sign, and save SF-52
- e. Update detail/step (provide additional comments, if necessary)
- f. Select distribution for e-mail notifications
- g. Attach supporting documentation, if necessary
- h. Reassign to the next person in the process (updates owner information & generates the e-mail notifications)

### *III. Reviewing the Status of a Request/Case – Steps*

To check the status of the case:

- a. Log in and select a role
- b. Search for the recruitment request through case tracking (details in Section Two)
- c. You can view the case information, SF-52, and case 'history' records which include rows for each step and reassignment completed, comments, links to attachments, and information on who received the e-mail notifications at each step.
- d. You also have the option to run and download reports (Section 8)

To view instructions for initiating specific case types (Personnel Action, Recruitment, Classification, Pay and Leave, etc.) refer to the section associated with each case type.



### 3.3. Editing and Digitally Signing the SF-52

Click on the appropriate **e-Sign** button(s) to digitally sign the SF-52 before routing/reassigning to the next person in the approval chain.

Note: Block 1 will have to be revised to indicate the specific type of Personnel Action you are requesting. Type in the action you are requesting (See Appendix 5 for additional information).

All other requests will auto-populate Block 1 of the SF-52 based on the information you provide on the case information page.

After clicking the **e-Sign** button, you will be asked to confirm your intent to sign. Click on the **Yes** button.

Enter your CAC PIN or FedHR Navigator password if you are not using the CAC then click on the **Submit** button.

Click **Save** at the top right of the screen then select 'Previous Screen' to return to case information page.



### 3.4. Case Status Email Notifications

FedHR Navigator will be used to notify stakeholders of the status of ‘cases’ they are working on. The contents of the emails are customized for each agency. FedHR Navigator will send e-mail notifications in the following situations:

- **When reassigning a case** – FedHR Navigator will auto-generate an e-mail to the owner of the case to let recipient know that the case has been assigned to him/her.
- **When reassigning a case you do not own**- When a case is reassigned and the previous owner is not the person doing the reassign action, the previous owner will receive an auto-generated email notification to let him/her know that the case is no longer assigned to him/her.
- **When updating a case - to the employee** – FedHR will send an e-mail to the employee then the case is updated if the person who updates the case chooses “Yes” to “send an email to the employee” field. The notification will include the comments from the regular comments section but not from the HR Comments section
- **When updating a case – to the “To Be Notified” list** –FedHR Navigator will send emails to all recipients on the “To Be Notified” list when a case is updated. Anyone who has access to a case can add any email addresses to the “To Be Notified” list; however, when the case is updated, the user has a choice of which email addresses should be notified. That is, email addresses on the “To Be Notified” list can be considered a list of recipients who wish to receive updates, but the person who makes the update still has discretion over which email addresses are sent the update notification.





## Section 4 – Case Tracking

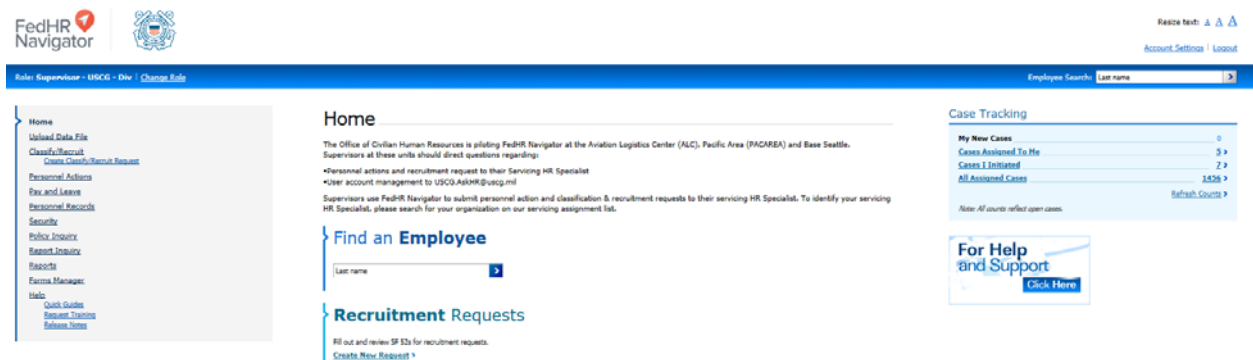
### 4.1. Case Tracking Introduction

The *Case Tracking* functionality in FedHR enables HR users, Civilian Resource Coordinators (CRCs), Supervisors, and employees to track the progress of an action or request being processed. This feature also allows tracking of workload, types of work being performed, and time spent on each case. In a sense, Case Tracking is similar to a specialized email system, including the ability to attach documents to messages.

Supervisors and CRCs have the ability to open any case within their assigned organization level, view the case history, reassign the case as necessary, add comments, add a step, or upload attachments.

Different *roles* within USCG FedHR have different *access* to case types. Agency case types are displayed in the left menu, and at this time, case types available to Supervisors and CRCs are: Classification/Recruitment, Personnel Actions, Pay and Leave, Security, Policy Inquiry, Report Inquiry, Reports and Help. Appendix 2 provides additional information and descriptions of these case types.

[Note: The user guides available from the Help section of the navigation menu do not reflect customized features created for the USCG. The guides available on CG121 portal/website page will reflect the USCG custom features and processes]



The “Case Tracking” section is located on the right side of the home page (displayed above). This section provides a count of all ‘open’ case work within the organization codes you have been provided access for, regardless of the case type. It also displays the number of cases pending action by you (Cases Assigned to Me) and a count of the open cases that you have initiated and routed through your organizations approval authorization process (Cases I initiated), and All Cases Assigned within your assigned organization level. These headings are hyperlinked to the case tracking page and will bring up the tabbed ‘workspace views’ associated with the headings.





The screenshot provided below displays the result after selecting the Case Tracking hyperlink for All Assigned Cases:

The screenshot shows the 'Case Tracking' interface. At the top, there are tabs for 'Assigned to Me', 'Initiated by Me', and 'All Cases'. The 'All Cases' tab is selected and circled in red. Below the tabs is a table of cases. The table has columns for 'Tracking Number', 'Activity', 'Date & Time', 'Owner', 'PCNs', 'Title', 'Series', 'Grade', 'Prop. Eff. Date', and 'Vacancy Announcement #'. The table displays several cases, including '3021', '3017', '3016', '3015', '3010', and '3009\*'. The '3009\*' case is marked with a red asterisk, indicating it is a new case that has not been updated by the owner.

Each of the Tabs displayed above (circled in red) provide case tracking views that correspond with the hyperlinks provided in the case tracking section located on the home page. You can toggle between views by clicking on the tabs. An individual detail or step of each case is called a “Case Tracking Item” and is assigned to an "owner" to be worked on. To view cases that have been assigned to you, select the tab with the heading Assigned to Me.

The Assigned to Me case tracking view should be viewed on a regular basis to ensure that you review and take appropriate action in a timely manner. You will receive e-mail notifications when a case is reassigned to you pending action as the owner of the case. The “Owner” of the case is listed in all case tracking views and is updated in ‘real-time’ as cases are reassigned.

To view cases by Case Type, click on the case type listed on the Navigation Menu on the left side of the home page. For example, clicking on “Classification/Recruitment” displays all Classification/Recruitment case tracking items open for your organization, you will have to select the “Assigned to Me” tab to view all classification/recruitment cases assigned to you for action.

The “All Cases” tab will bring you back to view all cases assigned at you organization level.

The screenshot shows the 'Case Tracking' interface. At the top, there are tabs for 'Assigned to Me', 'Initiated by Me', and 'All Cases'. The 'All Cases' tab is selected and circled in red. Below the tabs is a table of cases. The table has columns for 'Tracking Number', 'Activity', 'Date & Time', 'Owner', 'PCNs', 'Title', 'Series', 'Grade', 'Prop. Eff. Date', and 'Vacancy Announcement #'. The table displays several cases, including '3021', '3017', '3016', '3015', '3010', and '3009\*'. The '3009\*' case is marked with a red asterisk, indicating it is a new case that has not been updated by the owner.

The red asterisk(\*) next to the case tracking number implies a new case that has not been updated by the owner.



## 4.2. Search, Open, Review, and Edit Cases

To view and search for cases, click the appropriate Case Type in the left menu **or** select "All Assigned Cases" from the Case Tracking Menu on the Right side of your home screen; the Case Tracking view will open.

### 4.2(a) Search Criteria

In the search criteria fields below the column headings, enter a key word under Tracking Number, Activity, Detail/Step, HR Comments, Date and Time, Employee, and/or Owner. Then click the "Submit Search Query" button (see white arrow/red outline).

**Case Tracking**

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

**Assigned to Me** **Initiated by Me** **All Cases**

**Tracking**

Tracking Number	Case Type	Activity	Detail/Step	HR Comments	Date & Time	Employee	Owner
<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter Name</a>
<input checked="" type="checkbox"/> Open Cases Only	<a href="#">Submit Search Query</a>	<a href="#">Clear Search Form</a>	<a href="#">Expanded View</a>	<a href="#">Reset Page</a>	Displaying page 4 of 27		
1555	Benefits	Forms Submitted	06/16/2014 09:42:54 AM	DARWIN, CHUCK	ALGOMINO, FRED		
1532 *	Retirement	Package Deleted	04/25/2014 01:36:43 PM	DARWIN, CHUCK	ALGOMINO, FRED		
1533	On-boarding	Forms Reviewed	04/24/2014 06:14:17 PM	PERCCA, ELIZABETH	ALGOMINO, FRED		

**Search Criteria;** you may input more than one fields but only one is required to filter your search

For example, if you input an employee's name in the search criteria field below (last\_name, first\_name) then click submit search query, only records for Robert Jones will display in your screen (see below).

**Case Tracking**

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

**Assigned to Me** **Initiated by Me** **All Cases**

**Tracking**

Tracking Number	Case Type	Activity	Detail/Step	HR Comments	Date & Time	Employee	Owner
<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter keyword</a>	<a href="#">Enter Name</a>
<input checked="" type="checkbox"/> Open Cases Only	<a href="#">Submit Search Query</a>	<a href="#">Clear Search Form</a>					
5020	Personnel Actions	Process Action in the Personnel/Payroll System	Process Action in the Personnel/Payroll System		04/12/2017 02:23:52 PM	Jones, Robert	BASEY, TEST

Your search returned 1 cases.



#### 4.2(b) View All Cases (Open and Closed)

To view all cases, open and closed, go to the appropriate case listing page (e.g., Classify/ Recruitment), and then uncheck the “Open Cases Only” checkbox and press “Submit Search Query”.

### Case Tracking

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

#### Selected Employee

No employee selected.

[New Case](#)

[Assigned to Me](#)
[Initiated by Me](#)
[All Cases](#)

Tracking Number	Case Type	Activity	Detail/Step	HR Comments	Date & Time	Employee	Owner
<input type="text" value="Enter keyw"/>	<input type="text" value="Activity"/>	<input type="text" value="Detail/Step"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Jones, Robert"/>	<input type="text" value="Enter Name"/>	
<input checked="" type="checkbox"/> Open Cases Only <a href="#">Submit Search Query</a> <a href="#">Clear Search Form</a> <a href="#">Expand View</a> <a href="#">Previous Page</a> <a href="#">Next Page</a> Displaying page 1 of 27							
<a href="#">1555</a>	Benefits	Military	Forms Submitted		06/16/2014 09:42:54 AM	<a href="#">DARWIN, CHUCK</a> <small>Org: Budget Ofc (01-01-0000-00-00-00-00)</small>	ALGOMINO, FRED
<a href="#">1532</a> *	Retirement	Miscellaneous	Package Deleted		04/25/2014 01:36:43 PM	<a href="#">DARWIN, CHUCK</a> <small>Org: Budget Ofc (01-01-0000-00-00-00-00)</small>	ALGOMINO, FRED
<a href="#">1533</a>	On-boarding	New Appointment Temporary	Forms Reviewed	sdfgdsfg	04/24/2014 06:14:17 PM	<a href="#">FERCCA, ELIZABETH Type 2</a> <small>Org: Staffing Ofc (01-02-0000-00-00-00-00)</small>	ALGOMINO, FRED

#### 4.2(c) Sorting Actions in the Workflow Inbox

To sort items in your inbox, click on the column heading above the search criteria field and the column will resort in ascending descending order.

### Case Tracking

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

#### Selected Employee

No employee selected.

[New](#)

[Assigned to Me](#)
[Initiated by Me](#)
[All Cases](#)

Tracking Number	Case Type	Activity	Detail/Step	HR Comments	Date & Time	Employee	Owner
<input type="text" value="Enter keyw"/>	<input type="text" value="Activity"/>	<input type="text" value="Detail/Step"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Jones, Robert"/>	<input type="text" value="Enter Name"/>	
<input checked="" type="checkbox"/> Open Cases Only <a href="#">Submit Search Query</a> <a href="#">Clear Search Form</a> <a href="#">Expand View</a> <a href="#">Previous Page</a> <a href="#">Next Page</a> Displaying page 1 of 27							
<a href="#">1555</a>	Benefits	Military	Forms Submitted		06/16/2014 09:42:54 AM	<a href="#">DARWIN, CHUCK</a> <small>Org: Budget Ofc (01-01-0000-00-00-00-00)</small>	ALGOMINO, FRED
<a href="#">1532</a> *	Retirement	Miscellaneous	Package Deleted		04/25/2014 01:36:43 PM	<a href="#">DARWIN, CHUCK</a> <small>Org: Budget Ofc (01-01-0000-00-00-00-00)</small>	ALGOMINO, FRED
<a href="#">1533</a>	On-boarding	New Appointment Temporary	Forms Reviewed	sdfgdsfg	04/24/2014 06:14:17 PM	<a href="#">FERCCA, ELIZABETH Type 2</a> <small>Org: Staffing Ofc (01-02-0000-00-00-00-00)</small>	ALGOMINO, FRED



### 4.3. Case History

1. After open a case by clicking on the blue “Tracking Number” displayed in the first column the “Case Information” screen appears (illustration below).
2. Click on the "View History" button to open the Case History window.

#### Classify/Recruit

# CG-2017-00060

The following information will automatically flow to all attached forms. Please upload additional attachments using 'Upload New Document'.

**NOTE:** Before the request is approved, the bold fields should be completed.

You are viewing this request in read-only mode. This request must be assigned to you and open in order to edit it.

[Reassign](#) [View History](#) [Back](#)

#### Case #4966

**Owner:** KEMP, KATHERINE

**Case Type:** Classify/Recruit

**Case Activity:** Classification

**Last Detail/Step:** Submitted

**Last Updated By:** KEMP, KATHERINE  
10/19/2016 11:15 AM

**HR Comments:**

#### Case Information

**Vacancy  
Announcement #:**

#### Position Information

**Position Title**

Test

**Position Description  
Number**

Test23

**Pay Plan**

ES ☒

**Occupational Series  
Code**

2200

**Grade(s)**

01 ☒ to 05 ☒

**Name of Position's  
Organization**

U.S. Coast Guard  
(00-00-0000-00-00-00)

**Duty Station**

Alexandria, Virginia

**POI**

USCG (POI 2783) ☒

#### Documentation

##### Recruitment

• [SF 52](#)

#### To Be Notified List

The following email addresses will receive a email when this case is updated:



3. The Case History window will display a row for each Detail/Step that was added to the case. Use the scroll bars at the bottom and on the right side of the window to see all the rows and columns (to include attachments added and who was notified during each step).

Case History							
Case Type	Activity	Detail/Step	Tracking Number	Comments	Date & Time	Performed By	Attachment
Classify/Recruit	Classification	PD Classified	4962	Reassigned by TEST BASEY to TEST BASEY.	10/17/2016 4:00 PM	BASEY, TEST	
Classify/Recruit	Classification	PD Classified	4962	Reassigned by TEST BASEY to Test Thayer.	10/7/2016 2:41 PM	BASEY, TEST	<ul style="list-style-type: none"> <li>Final PD.doc</li> <li>TEST OFB mock.doc</li> </ul>
Classify/Recruit	Classification	PD Review	4962		10/3/2016 12:38 PM	BASEY, TEST	
Classify/Recruit	Classification	PD Review	4962		10/3/2016 12:29 PM	BASEY, TEST	
Classify/Recruit	Classification	PD Review	4962	Reassigned by COURTNEY MCGOWAN to Test Thayer.	9/28/2016 1:50 PM	MCGOWAN, COURTNEY	

4. To view forms associated with the case, look in the Attachment column on the right side of the screen (use scroll bar to view more of the attachment column and the Notified Column).

Case History								
	Detail/Step	Tracking Number	Comments	HR Only Comments	Date & Time	Performed By	Attachment	Notified
ation	PD Classified	4962	Reassigned by TEST BASEY to TEST BASEY.		10/17/2016 4:00 PM	BASEY, TEST		thayer.n.leque@uscg.mil
ation	PD Classified	4962	Reassigned by TEST BASEY to Test Thayer.		10/7/2016 2:41 PM	BASEY, TEST	<ul style="list-style-type: none"> <li>Final PD.doc</li> <li>TEST OFB mock.doc</li> </ul>	thayer.n.leque@uscg.mil
ation	PD Review	4962			10/3/2016 12:38 PM	BASEY, TEST		
ation	PD Review	4962			10/3/2016 12:29 PM	BASEY, TEST		Amy.K.Laughter@uscg.mil
ation	PD Review	4962	Reassigned by COURTNEY MCGOWAN to Test Basey.		9/28/2016 1:50 PM	MCGOWAN, COURTNEY		Amy.K.Laughter@uscg.mil
			Donna,					

5. To close the history window click the "X" in the top right side of the pop-up window(s). You will be returned to the case information page.





6. You have two options to exit the case or view another case:
- Click on the blue “Back” button to return to the case tracking view: or
  - Click on "Home" or a case type on the left of the screen. (Do not hit the 'back arrow')

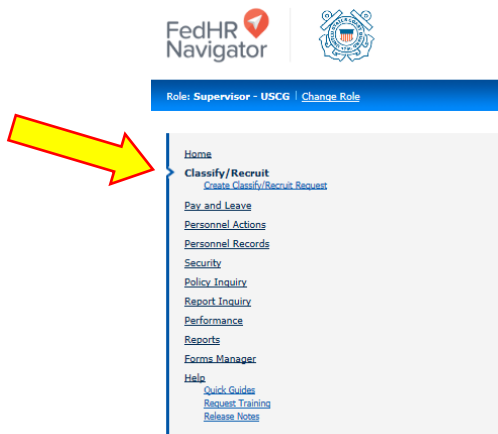
## Classify/Recruit

# CG-2017-00072

The following information will automatically flow to all attached forms. Please upload additional attachments using 'Upload New Document'.

**NOTE:** Before the request can be approved, the bold fields should be completed.

[Add Step/Comments/Reassign](#) [Close Case](#) [View History](#) [Back](#)



To Exit from a Case:

Blue Back Button

Or

Click on a case type in the  
Navigator Menu

## 4.4 Forms in Read Only Mode

**You must be the owner of the case in order to edit any forms attached to a case.**

If you do not own the case and associated forms, you will see a red message “You are viewing this form in read only mode.” If you notice an error or need to make an update to the forms associated with a specific case, contact the Servicing Specialist or Owner assigned to the case to request a correction.

## Classify/Recruit

# CG-2017-00075

The following information will automatically flow to all attached forms. Please upload additional attachments using 'Upload New Document'.

**NOTE:** Before the request can be approved, the bold fields should be completed.

You are viewing this request in read-only mode. This request must be assigned to you and open in order to edit it.

[View History](#) [Back](#)

Case #5021



## Section 5 - Classification Request/Case Information

### 5.1. Classification Request Introduction

Title 5, United States Code, governs the classification of positions in the Federal service. The law states that positions shall be classified based on the duties and responsibilities assigned and the qualifications required to do the work. As such, a position description (PD), or job description (JD) for a wage-determined position, may be the single most important document for a civilian employee and the employee's supervisor. It is the basis for a number of action items by management. Generally, a new position description is required when:

- A new position is established.
- The major duties of a position changed since the last official classification decision.
- The position duties and responsibilities are modified as a result of a proposed reprogramming, position upgrade request, or other management action.

Upon receipt, submissions will be checked for completeness. A complete classification request consists of a signed Optional Form 8 (OF-8) with the position description and a copy of the organization chart. A copy of the request memo should be attached if the classification request is tied to an OMR.

- Receipt of complete packages will be acknowledged by the servicing HR Specialist or Field HR Specialist with an e-mail notification generated from within our case management system (FedHR). The certifying official from block 20a on the Optional Form 8 will be added to the case notification. Status updates will be sent via FedHR to the certifying official throughout the classification process
- Incomplete packages will be returned to the certifying official listed in block 20a on the Optional Form 8.

Ensuring complete packages will avoid delays in the classification process within CG-1211 and centralizing the receipt of the packages will ensure all requests are thoroughly tracked.

The link to the **PD library** on the portal is:

<https://cg.portal.uscg.mil/units/cg121/Position%20Descriptions/Forms/AllItems.aspx>

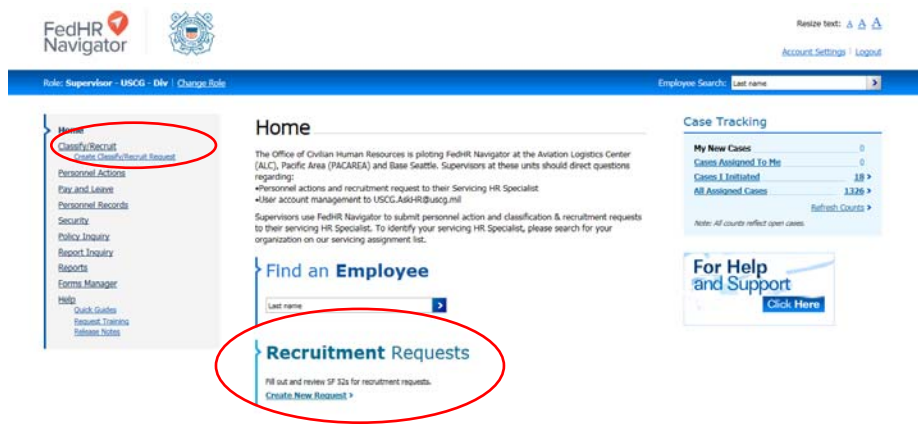
*The Manager's Guide to Position Classification* provides more detailed information on the classification process. A copy is provided on the portal in the instructions folder of the PD Library and can also be accessed at the address provided for the USCG website:

[http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Classification/Managers\\_Classification\\_Guide.pdf?ver=2017-04-21-113637-623](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Classification/Managers_Classification_Guide.pdf?ver=2017-04-21-113637-623)

Please contact your servicing [HR Specialist](#) if you have any questions related to classifying a position. The list for the servicing Assignment Representatives (<http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/service.docx?ver=2017-03-23-143648-310>).



## 5.2. How to initiate a Classification Request/Case in FedHR



1. First Line Supervisor initiates the Classification Request and submits a complete classification package (OF8 and PD) via FedHR. The requester can initiate the classification requests by clicking on either of the hyperlinks provided on the Supervisor Home Page (the options are circled in red above):
  - a. click the hyperlink bottom center of supervisor homepage; or
  - b. click the hyperlink in the navigation menu
2. The case creation page will open. Type in all position information (mandatory fields are in bold font)
  - a. Position Information

**Create Classify/Recruit**

Please enter the new recruitment request information below. Once complete click "Save and Next Screen" to continue.  
**NOTE:** Before the request can be approved, the bold fields should be completed.

Position Information	
<b>Case Activity</b>	Classification
<b>Position Title</b>	Accountant
<b>Position Description Number</b>	000001
<b>Pay Plan</b>	GS
<b>Occupational Series Code</b>	0501 <a href="#">Lookup...</a>
<b>Grade(s)</b>	09 to 12
<b>Name of Position's Organization</b>	COMMANDANT (CG-8) / DEPUTY CMDT (CG-8D) - ASST COMMANDANT FOR RESOURCES - CPO DIR OF FINANCIAL OPERATIONS - COMPTROLLER (CG-8C) OFF OF FINANCIAL POLICY, REPORTING & PROPERTY (CG-84) (64-10-0001-00-00-00-00) <a href="#">Lookup...</a>

- i. **Case Activity** (Mandatory) Select Classification from drop down menu
- ii. **Position Title** (Mandatory)
- iii. **Position Description Number** (Mandatory)
- iv. **Pay Plan** (Mandatory)





v. **Occupational Series Code (Mandatory)**

**Search Occupational Series Code**
✕

Enter the Series code or Code Description or Group Family Description and click Search.

Search

Search result(s). Please click the link to select the value.

Code	Description	Group Family Description
<a href="#" style="color: #0070C0;">0501</a>	Financial Administrator	

- vi. **Grades (Mandatory):** Select the Lowest Grade that is expected for classification and the Highest Grade if this position has promotion potential
- vii. **Name of Position's Organization (Mandatory)**

**Select an organization**
✕

Please select an organization.

Search

Include inactive organizations

Organization	Org Code	Level	Select
COMMANDANT (CG-8) / DEPUTY CMDT (CG-8D) - ASST COMMANDANT FOR RESOURCES - CFO	64-00-0000-00-00-00-00	2	<a href="#" style="color: #0070C0;">Select</a>
DIR OF FINANCIAL OPERATIONS - COMPTROLLER (CG-8C)	64-10-0000-00-00-00-00	3	<a href="#" style="color: #0070C0;">Select</a>
OFF OF FINANCIAL POLICY, REPORTING & PROPERTY (CG-84)	64-10-0001-00-00-00-00	4	<a href="#" style="color: #0070C0;">Select</a>
AUDIT REMEDIATION DIV (CG-845)	64-10-0001-01-00-00-00	5	<a href="#" style="color: #0070C0;">Select</a>
FINANCIAL MGMT POLICY DIV (CG-843)	64-10-0001-02-00-00-00	5	<a href="#" style="color: #0070C0;">Select</a>
FINANCIAL REPORTING & ANALYSIS DIV (CG-842)	64-10-0001-03-00-00-00	5	<a href="#" style="color: #0070C0;">Select</a>
PERSONNEL PROPERTY ACCOUNTABILITY DIV (FINCEN) (CG-844)	64-10-0001-04-00-00-00	5	<a href="#" style="color: #0070C0;">Select</a>
OFF OF FINANCIAL SYS BUSINESS REQUIREMENTS (CG-86)	64-10-0002-00-00-00-00	4	<a href="#" style="color: #0070C0;">Select</a>
OFF OF INTERNAL CONTROLS (CG-85)	64-10-0003-00-00-00-00	4	<a href="#" style="color: #0070C0;">Select</a>
OFF OF BUDGET & PROGRAMS (CG-82)	64-02-0000-00-00-00-00	3	<a href="#" style="color: #0070C0;">Select</a>
BUDGET FORMULATION DIV (CG-822)	64-02-0001-00-00-00-00	4	<a href="#" style="color: #0070C0;">Select</a>

Click **Select** when you locate the organization level you are searching for.

Use the right scroll bar if the search returns results than are visible

1. Select the Organization Level the position is located in; there are two ways to make this selection
  - a. Type in the Search Field to apply a filter
  - b. Use the scroll bar located on the right side of the pop up window until the Organization title is visible
2. Once the Organization you are searching for is visible, click the blue hyperlink **Select** associated with that organization level



viii. **Duty Station (Mandatory)**

3. Select State from drop down
4. Type in City then click on 'Search' to activate the pop-up window with options related to your search request then
5. Select the station from the options provided

Station Name	Country/State	Duty Station Code	Type	County
<a href="#">Kodiak</a>	Alaska	021340150	City	Kodiak Island
<a href="#">Kodiak Island</a>	Alaska	020000150	County	Kodiak Island
<a href="#">Kodiak Station</a>	Alaska	021342150	City	Kodiak Island

ix. **POI** defaults to USCG – Div (POI 2783); no action is required

3. Requesting Office Information

- i. **Action Requested** (Mandatory)
  1. this field defaults to Recruitment
  2. type in Classification
- ii. **Vice** (Optional)
- iii. **Proposed Effective Date** (Mandatory) insert a date approximately 3 months from submission date, HR Specialist can adjust after receipt
- iv. **Requester Comments** (Optional) use this block to notify management, resource coordinators, and HR specialists of specific information related to the classification request (SARR/OMR/..., etc., )



#### 4. Budget Information

A screenshot of the "Budgeting Information" form. It has a blue header with the title. Below the header, there are three main sections: "Appropriation Code" with a text input field, "Number of Positions" with a numeric input field containing the value "2", and "PCN(s)" with a text input field containing "00001" and a blue "Add PCN" button. Below the PCN input, there are two small blue buttons with "x" icons, one next to "00001" and one next to "00002". At the bottom of the form, there are two buttons: "Save and Next Screen" and "Cancel".

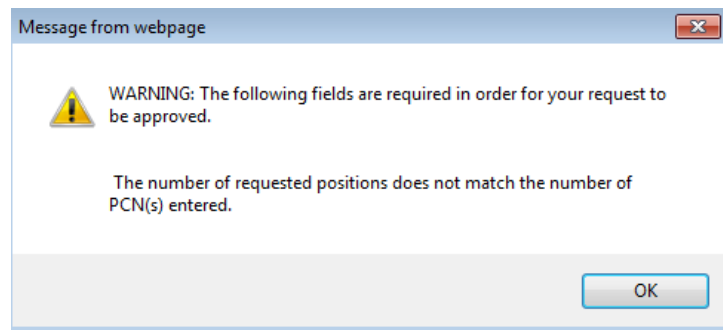
- i. Appropriation Code (Optional)
- ii. Number of Positions (Mandatory)
- iii. **PCN(s)** (Mandatory by USCG procedures but system will not generate an error. Ensure this field is filled in)
  1. Type in the PCN
  2. If more than one position number than select "Add PCN" after typing in the 1<sup>st</sup> number.

#### 5. Select **Save and Next Screen** if you are ready to move forward.

NOTE: Cancel will bring you back to the beginning without saving your work.

#### 6. You will receive warning messages if you:

- i. Did not fill out ALL of the Mandatory fields
- ii. The number of requested positions does not match the number of the PCN(s) you entered



- iii. Resolve the warning messages by clicking "OK" and correcting the corresponding fields (blank mandatory field, Number of Positions, or add or remove additional PCN(s)).
  1. Fill in missing mandatory information then re-click save;
  2. Add additional PCN(s) as necessary to match number of positions indicated; or
  3. Delete erroneous PCNs click on the blue 'x' next to the number then re-select save.



- After saving your work, the case information page will open (see screenshot below) and you should proceed to reassign the case. If you chose to close FedHR at this point the information you input has been saved and you will be able to retrieve through case tracking at a later time.

## Classify/Recruit

# CG-2017-00072

The following information will automatically flow to all attached forms. Please upload additional attachments using 'Upload New Document'.

**NOTE:** Before the request can be approved, the bold fields should be completed.

[Add Step/Comments/Reassign](#) [Close Case](#) [View History](#) [Back](#)

### Case #5015

Owner:	BASEV, TEST
Case Type:	Classify/Recruit
Case Activity:	Classification
Last Detail/Step:	Submitted
Last Updated By:	BASEV, TEST
	4/10/2017 11:01 AM
HR Comments:	
HR Only Comments:	

### Case Information

Vacancy Announcement #:

### Position Information

Position Title	<input type="text" value="Accountant"/>
Position Description Number	<input type="text" value="00001"/>
Pay Plan	<input type="text" value="GS"/>
Occupational Series Code	<input type="text" value="0301"/> <a href="#">Lookup...</a>
Grade(s)	<input type="text" value="GS"/> to <input type="text" value="12"/>
Name of Position's Organization	<input #"="" type="text" value="COMMANCANT (CG-E) - ASST&lt;br/&gt;COMMANCANT FOR RESOURCES - CFO&lt;br/&gt;DIR OF FINANCIAL OPERATIONS -&lt;br/&gt;COMPTROLLER (CG-SC)&lt;br/&gt;DIR OF FINANCIAL POLICY, REPORTING &amp;&lt;br/&gt;PROPERTY (CG-PA)&lt;br/&gt;(S4-10-0001-00-00-00-00)&lt;br/&gt;&lt;a href="/> Lookup...
Duty Station	<input type="text" value="Kodiak, Alaska"/> <a href="#">Lookup...</a>
POI	<input type="text" value="USCG (POI 2782)"/>

### Requesting Office Information

Request Number :	CG-2017-00072
Contact	<input type="text" value="TEST BASEV"/>
Contact Phone	<input type="text"/>
Action Requested	<input type="text" value="Classification"/>
Vice	<input type="text"/>
Proposed Effective Date	<input type="text" value="01/10/2017"/>
Requester Comments	<input type="text"/>

### Budgeting Information

Appropriation Code	<input type="text"/>
Number of Positions	<input type="text" value="2"/>
PCN(s)	<input type="text" value="00002"/> <a href="#">Add PCN</a>
<small>Add as many PCNs as needed. Remove using the 'X' icon.</small> <input type="text" value="00002"/> <input type="text" value="000001"/>	
<a href="#">Save</a> <a href="#">Back</a>	

### Documentation

#### Recruitment

[SE 52](#) [Audit Log](#)

### Attachments

[Upload New Document](#)

### To Be Notified List

The following email addresses will receive a email when this case is updated:

[Add/Edit Notify List](#)

**U.S. Coast Guard  
Office of Civilian Human Resources  
FedHR Navigator  
Supervisor Guide**



**NOTE:** Although the case detail/step will show as 'submitted' at this point, the case has not been routed and it is still assigned to you as the owner. The SF-52 will need to be digitally signed in Block 5 and the case will need to be 'reassigned' to the 2<sup>nd</sup> line supervisor for concurrence and signature in Block 6 then forwarded through reassignments within the chain of approval.

## Classify/Recruit

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

### Selected Employee

No employee selected.

[New Case](#)

Assigned to Me Initiated by Me All Cases											
Tracking Number	Activity	Detail/Step	HR Comments	Date & Time	Owner	PCNs	Title	Series	Grade	Prop. Eff. Date	Vacancy Announcement #
<input type="text" value="Enter keyw"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Enter Name"/>						<input type="text" value="Enter keyword"/>
<a href="#">Expand View</a>	<input checked="" type="checkbox"/> Open Cases Only	<a href="#">Submit Search Query</a>	<a href="#">Clear Search Form</a>	<a href="#">Previous Page</a>	<a href="#">Next Page</a>	Displaying page 1 of 2					
<a href="#">5021</a>	Recruitment Request	Submitted		04/12/2017 03:15:41 PM	JOHNSON, CARNITTA	00008558	Criminal Investigator	1811	13	01/09/2017	1
<a href="#">5017</a>	Recruitment Request	Submitted		04/11/2017 01:48:43 PM	TATE, BARRY	00110011	Training Specialist	1712	11	01/15/2017	
<a href="#">5016</a>	Recruitment Request	Submitted		04/11/2017 12:49:34 PM	SULLARD, THOMAS		CSM Program Manager	0343	13	01/16/2017	
<a href="#">5015</a>	Classification	Submitted		04/10/2017 11:01:29 AM	BASEY, TEST	000001, 000002	Accountant	0501	09	01/10/2017	
<a href="#">5010</a>	Recruitment Request	Resource Coordinator Approval		04/03/2017 10:18:12 AM	SHIELDS, SHARON		tst	0301	01	01/02/2017	
<a href="#">5009 *</a>	Recruitment Request	Management Approval		04/03/2017 10:05:24 AM	BASEY, TEST	0000000	test	0301	01	01/02/2017	

Classification Requests do not require SF-52 so you will not need to e-sign; the next step is to reassign the case.

## Classify/Recruit

# CG-2017-00072

The following information will automatically flow to all attached forms. Please upload additional attachments using 'Upload New Document'.

**NOTE:** Before the request can be approved, the bold fields should be completed.

[Add Step/Comments/Reassign](#) [Close Case](#) [View History](#) [Back](#)

### Case #5015

Owner:	BASEY, TEST
Case Type:	Classify/Recruit
Case Activity:	Classification
Last Detail/Step:	Submitted
Last Updated By:	BASEY, TEST
	4/10/2017 11:01 AM
HR Comments:	
HR Only Comments:	

**Case Information**

Vacancy Announcement #:

### Documentation

#### Recruitment

• [SF 52](#) [Audit Log](#)

### Attachments

[Upload New Document](#)

### To Be Notified List

The following email addresses will receive a email when this case is updated:

[Add/Edit Notify List](#)



### 5.3. Reassigning Classification Request

1. **New PD Requested**: 1<sup>st</sup> Line Supervisor routes to 2<sup>nd</sup> Line Supervisor after signing SF-52 and selecting new Detail/Step from the drop down menu. (Refer to Appendix 5 for guidance on Detail/Step selection).

**Classify/Recruit**  
# CG-2017-00072

The following information will automatically flow to all attached forms. Please upload

**NOTE:** Before the request can be approved, the bold fields should be completed.

**Add Step/Comments/Reassign** **Close Case** **View History** **Back**

**Case #5015**

Owner: BASEY, TEST  
Case Type: Classify/Recruit  
Case Activity: Classification  
Last Detail/Step: Submitted  
Last Updated By: BASEY, TEST  
4/10/2017 11:01 AM  
HR Comments:

- a. Select new detail/step option: **New PD Requested**

**Add Detail/Step**

Detail/Step: **Select**

Comments:

HR Only Comments:

Send an Email to Requester?

Notify By Email:

Assign this case to:

Attachment, if any

**New PD Requested**

Resource Coordinator Review

Resource Coordinator to HR Specialist

PD Review

Additional Documentation Needed

Management (Supv) Resubmit

Management (Supv) Approval Needed

Management (Supv) Approval to HR Specialist

PAL Approval Needed

PAL Updated

PD Classified

HR Management Review

HR Management Review Completed

Tentatively Classified

Union Notification

Union Review Complete

Branch Chief Review

Branch Chief Approval

HR Director Review

HR Director Approval

Contractor Review Complete

Override Requested

Browse...

Position Information



- b. Insert comments to provide additional information regarding the specific information related to this case

- c. Select your preference for sending e-mail to Requestor (Yes or No)  
d. Update the Notify by Email field to designate the stakeholders that should receive e-mails related to the status of the case.

The contacts added to the 'Notify By E-mail' field will be notified each time the status of the case is updated unless you 'uncheck' the box next to their e-mail address

- e. Assign this Case to:

Note: The "Assign this case to" field will remain as "Myself" until you finish attaching documents if required and "save" your work.





- f. Add Attachments: *Upload all required documents (PD, OF-8, org chart, etc.)*



- g. Click on Save; you will be returned to the case information page.

Attachments that were added will display on the case information page and can be viewed by clicking on the hyperlink labeled open

2. **Request Returned to HR:** 2<sup>nd</sup> Line Supervisor routes to HR Servicing Specialist (follow steps above 1a through 1f) and updating the Step:
  - a. Select new Detail/Step from case information page: **Request Returned to HR**
  - b. Insert comments (optional)
  - c. Send an Email to Requester: select “Yes” from drop down
  - d. Add additional e-mail notification if necessary
  - e. Send an Email to Requester: select “Yes” from drop down
  - f. Add additional e-mail notification if necessary
  - g. Assign this case to: HR Specialist’s e-mail information
  - h. Add additional attachments if necessary
  - i. Click on Save; you will be returned to the case information page.
3. HR Servicing Specialist reviews package for completeness and compare the information to PAL to confirm position is authorized...
  - a. **PD Review:** If complete, HR Specialist will forward a notification that complete package has been received and the classification process has begun.





- i. Case Activity Detail/Step will be updated to: **PD Review**
  - ii. Comments will be updated to include confirmation of receipt and additional information as necessary
- b. **Additional Documentation Needed:** If changes to the PD are required or additional documentation is needed, the HR case owner (HR servicing specialist or contractor who is evaluating the PD) will:
  - i. Reassign the case back to the 1<sup>st</sup> line supervisor;
  - ii. Changes activity to: **Additional Documentation Needed**; and
  - iii. Updates the comments section to include the specifics of what is needed

4. **Request Returned to HR:** Supervisor re-routes case to HR Specialist with requested information or additional supporting documentation or forms (see upload instructions in previous section 3f);
  - a. Upload additional documentation if requested;
  - b. Include corrected information or notes in comments section
  - c. Once response is received from the requesting management official the HR Specialist changes activity back to **Request Returned to HR**



Add Detail/Step	
Detail/Step	Select
Comments	Request Created/ Vacancy Identified Management Approval Resource Coordinator Approval Request Returned to HR ←
HR Only Comments	Servicing Branch Chief Approval Job Analysis Completed Job Opportunity Announcement (JOA) Drafted JOA - Management Approval JOA - Opened JOA - Closed Applications Reviewed Certificate(s) Created Certificate(s) Sent to Hiring Official Certificate(s) Returned from Hiring Official Tentative Selection/Offer Personnel Security Physical/Drug Testing Selectee Requesting Recruitment/Relocation Recruitment/Relocation Sent to Hiring Official Recruitment/Relocation Returned by Hiring Official
Send an Email to Requester?	Recruitment/Relocation Adjudicated by HR
Notify By Email:	Entry on Duty Date Set Initiate Onboarding
Assign this case to:	

- d. **PD Review:** HR Specialist or contractor reviews submission and updates the status to **PD review** and confirms receipt with notification to supervisors, resource coordinator, and additional personnel as appropriate.
4. If case is reassigned within HR or returned for any reason e-mail notifications will be forwarded from the HR specialist to all stakeholder identified in the e-mail notification fields in previous steps in case history.

#### 5.4. Classification Complete

HR Specialist will notify Supervisor and CRC when PD is fully classified

- a. Case status will be changed by HR Specialist to **PD Classified**; and
- b. Notifications will be generated based on HR Specialist notification selections (Supervisors, Resource Coordinators, and all stakeholder identified )
- c. FedHR case status will be changed to Closed (status notification e-mail will be generated to case requestor).



## Section 6 - Recruitment Request Information

### 6.1. Recruitment Request Introduction

The [Civilian Hiring Guide for Supervisors and Managers](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Staffing/Civilian_Hiring_Guide_Revised.pdf) is a resource to help supervisors and managers understand the civilian hiring process and the important role they have in the process. The guide provides additional information on the hiring process and a sample SF-52 and is located on the Office of Civilian Human Resources (CG-121) website at:

[http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Staffing/Civilian\\_Hiring\\_Guide\\_Revised.pdf](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Staffing/Civilian_Hiring_Guide_Revised.pdf).

See Appendix 6 of this guide for information on the Recruitment phases, detail/steps and definitions.

### 6.2. Recruitment Package

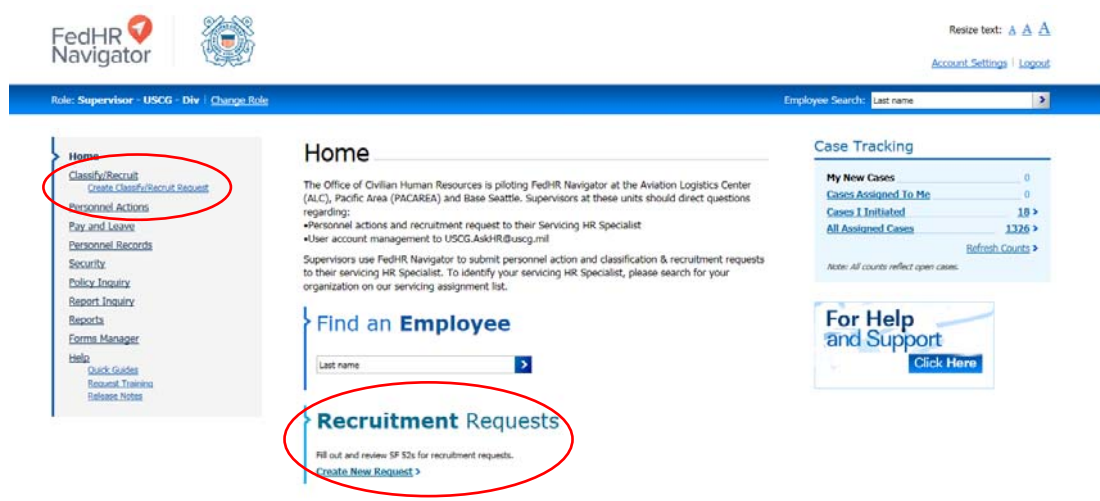
A complete recruitment package consists of:

- Request For Personnel Action (SF-52) reflecting:
  - Name and signature (digital signatures are acceptable) of the first level supervisor in block 5 (Action Requested By)
  - Name and signature (digital signatures are acceptable) of the second level supervisor in block 6 (Action Authorized By)
  - Name and signature (digital signatures are acceptable) of the unit's Civilian Resource Coordinator (CRC) in Part C (Reviews and Approvals)
- Classified Position Description (including signed OF8). The hiring process timeline does not begin until the position description is classified.
- Recruitment Checklist – Complete PART A only –

Note: If you are recruiting multiple positions/multiple locations using the same PD, submit one recruitment request (title, series, grades, etc., are the same) and include ALL PCNs. If you are recruiting for more than one position with different position descriptions, you must submit a separate recruitment case for each PD.



### 6.3. Initiating a Recruitment Request



1. First Line Supervisor initiates the Classification Request and submits a complete classification package (OF8 and PD) via FedHR.
  - a. The 1<sup>st</sup> line supervisor can initiate the recruitment requests by clicking on either of the hyperlinks provided on the Supervisor Home Page (the options are circled in red above):
    - i. click the hyperlink bottom center of supervisor homepage; or
    - ii. click the hyperlink in the navigation menu
2. The case creation page will open. Type in all position information (mandatory fields are in bold font)
  - a. Position Information

**Create Classify/Recruit**

Please enter the new recruitment request information below. Once complete click "Save and Next Screen" to continue.  
**NOTE:** Before the request can be approved, the bold fields should be completed.

Position Information	
<b>Case Activity</b>	Classification
<b>Position Title</b>	Accountant
<b>Position Description Number</b>	000001
<b>Pay Plan</b>	GS
<b>Occupational Series Code</b>	0501 <a href="#">Lookup...</a>
<b>Grade(s)</b>	09 to 12
<b>Name of Position's Organization</b>	COMMANDANT (CG-8) / DEPUTY CMDT (CG-8D) - ASST COMMANDANT FOR RESOURCES - CFO DIR OF FINANCIAL OPERATIONS - COMPTROLLER (CG-8C) OFF OF FINANCIAL POLICY, REPORTING & PROPERTY (CG-84) (64-10-0001-00-00-00-00) <a href="#">Lookup...</a>

- i. **Case Activity** (Mandatory) Pre-populates with Recruitment
- ii. **Position Title** (Mandatory)



- iii. **Position Description** Number (Mandatory)
- iv. **Pay Plan** (Mandatory)
- v. **Occupational Series Code** (Mandatory)

**Search Occupational Series Code**

Enter the Series code or Code Description or Group Family Description and click Search.

0501 [Search](#)

Search result(s). Please click the link to select the value.

Code	Description	Group Family Description
<a href="#">0501</a>	Financial Administrator	

- vi. **Grades** (Mandatory) Select the Lowest Grade that is expected for classification and the Highest Grade if this position has promotion potential
- vii. **Name of Position's Organization** (Mandatory)
  1. Select the Organization Level the position is located in; there are two ways to make this selection
    - a. Type in the Search Field to apply a filter
    - b. Use the scroll bar located on the right side of the pop up window until the Organization title is visible
  2. Once the Organization you are searching for is visible, click the blue hyperlink Select associated with that organization level

**Select an organization**

Please select an organization.

Search for CG-8 [Search](#) [Include inactive organizations](#)

Organization	Org Code	Level	Select
COMMANDANT (CG-8) / DEPUTY CMDT (CG-8D) - ASST COMMANDANT FOR RESOURCES - CFO	64-00-0000-00-00-00-00	2	<a href="#">Select</a>
DIR OF FINANCIAL OPERATIONS - COMPTROLLER (CG-8C)	64-10-0000-00-00-00-00	3	<a href="#">Select</a>
OFF OF FINANCIAL POLICY, REPORTING & PROPERTY (CG-84)	64-10-0001-00-00-00-00	4	<a href="#">Select</a>
AUDIT REMEDIATION DIV (CG-845)	64-10-0001-01-00-00-00	5	<a href="#">Select</a>
FINANCIAL MGMT POLICY DIV (CG-843)	64-10-0001-02-00-00-00	5	<a href="#">Select</a>
FINANCIAL REPORTING & ANALYSIS DIV (CG-842)	64-10-0001-03-00-00-00	5	<a href="#">Select</a>
PERSONNEL PROPERTY ACCOUNTABILITY DIV (FINCEN) (CG-844)	64-10-0001-04-00-00-00	5	<a href="#">Select</a>
OFF OF FINANCIAL SYS BUSINESS REQUIREMENTS (CG-86)	64-10-0002-00-00-00-00	4	<a href="#">Select</a>
OFF OF INTERNAL CONTROLS (CG-85)	64-10-0003-00-00-00-00	4	<a href="#">Select</a>
OFF OF BUDGET & PROGRAMS (CG-82)	64-02-0000-00-00-00-00	3	<a href="#">Select</a>
BUDGET FORMULATION DIV (CG-822)	64-02-0001-00-00-00-00	4	<a href="#">Select</a>

Use the right scroll bar if the search returns more results than are visible in window. Click Select when you locate the organization level you are searching for.



viii. **Duty Station (Mandatory)**

1. Select State from drop down

2. Type in City then click on 'Search' to activate the pop-up window with options related to your search request

Station Name	Country/State	Duty Station Code	Type	County
<a href="#">Kodiak</a>	Alaska	021340150	City	Kodiak Island
<a href="#">Kodiak Island</a>	Alaska	020000150	County	Kodiak Island
<a href="#">Kodiak Station</a>	Alaska	021342150	City	Kodiak Island

3. Then select the station from the hyperlink options provided
4. The POI defaults to USCG – Div (POI 2783); no action is required

b. **Requesting Office Information**

- i. **Action Requested (Mandatory)**
  1. this field defaults to Recruitment
  2. type in Classification
- ii. **Vice (Optional)** If backfilling for an employee that has vacated the position, input the previous incumbent's name
- iii. **Proposed Effective Date (Mandatory)**
- iv. **Requester Comments (Optional)** use this block to notify management, resource coordinators, and HR specialists of specific information related to the recruitment request (i.e. Multiple Position, Multiple Locations, etc.)



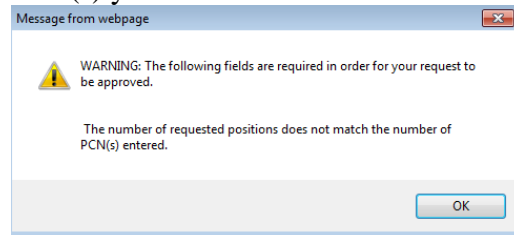


c. Budget Information

A screenshot of the "Budgeting Information" form. It has a blue header with the title. Below the header, there are three input fields: "Appropriation Code" (empty), "Number of Positions" (containing the number 2), and "PCN(s)" (empty). To the right of the "PCN(s)" field is a blue button labeled "Add PCN". Below the "PCN(s)" field, there are two small blue buttons with "x" icons, labeled "00001" and "00002". At the bottom of the form are two blue buttons: "Save and Next Screen" and "Cancel".

- i. Appropriation Code (Optional)
  - ii. Number of Positions (Mandatory)
  - iii. PCN(s) (Mandatory)
    1. Type in the PCN
    2. If more than one position number than select "Add PCN" after typing in the 1<sup>st</sup> number.
- d. Select Save and Next Screen if you are ready to move forward.  
NOTE: Cancel will bring you back to the beginning without saving your work.

- e. You will receive warning messages if you:
- i. Did not fill out ALL of the Mandatory fields
  - ii. The number of requested positions does not match the number of the PCN(s) you entered



- f. Resolve the warning messages by clicking "OK" and correcting the corresponding fields (blank mandatory field, Number of Positions, or add or remove additional PCN(s)).
1. Fill in missing mandatory information then re-click save;
  2. Add additional PCN(s) as necessary to match number of positions indicated; or
  3. Delete erroneous PCNs click on the blue 'x' next to the number then re-select save.





- g. After saving your work, the case information page will open (see screenshot below) and you should proceed to reassign the case. If you chose to close the case at this point the information you input has been saved and you will be able to retrieve through case tracking at a later time.

## Classify/Recruit

# CG-2017-00072

The following information will automatically flow to all attached forms. Please upload additional attachments using 'Upload New Doc'  
**NOTE:** Before the request can be approved, the bold fields should be completed.

[Add Step/Comments/Reassign](#) [Close Case](#) [View History](#) [Back](#)

### Case #5015

Owner:	BASEY, TEST
Case Type:	Classify/Recruit
Case Activity:	Classification
Last Detail/Step:	Submitted
Last Updated By:	BASEY, TEST
	4/10/2017 11:01 AM
HR Comments:	
HR Only Comments:	

### Case Information

Vacancy Announcement #:

### Position Information

Position Title	<input type="text" value="Accountant"/>
Position Description Number	<input type="text" value="00001"/>
Pay Plan	<input type="text" value="GS"/>
Occupational Series Code	<input type="text" value="GS01"/> <a href="#">Lookup...</a>
Grade(s)	<input type="text" value="GS"/> to <input type="text" value="12"/>
Name of Position's Organization	<input type="text" value="COMMANDANT (CG-6) - ASST"/> <input type="text" value="COMMANDANT FOR RESOURCES - CPO"/> <input type="text" value="DIR OF FINANCIAL OPERATIONS - CPO"/> <input type="text" value="COMPTROLLER (CG-6C)"/> <input type="text" value="CPO OF FINANCIAL POLICY, REPORTING &amp; PROPERTY (CG-64)"/> <input type="text" value="(84-10-0001-00-00-00-00)"/>
	<a href="#">Lookup...</a>
Duty Station	<input type="text" value="Kodiak, Alaska"/> <a href="#">Lookup...</a>
POI	<input type="text" value="USCG (POI 2785)"/>

### Requesting Office Information

Request Number :	CG-2017-00072
Contact	<input type="text" value="TEST BASEY"/>
Contact Phone	<input type="text"/>
Action Requested	<input type="text" value="Classification"/>
Vice	<input type="text"/>
Proposed Effective Date	<input type="text" value="01/10/2017"/>
Requester Comments	<input type="text"/>

### Budgeting Information

Appropriation Code	<input type="text"/>
Number of Positions	<input type="text" value="2"/>
PCI(s)	<input type="text" value="00002"/> <a href="#">Add PCI</a>
<small>Add as many PCIs as needed. Remove using the 'X' icon.</small>	
	<input type="text" value="000001"/>

[Save](#) [Back](#)

### Documentation

#### Recruitment

[SE 52](#) [Audit Log](#)

### Attachments

[Upload New Document](#)

### To Be Notified List

The following email addresses will receive a email when this case is updated:

[Add/Edit Notify List](#)



**NOTE:** Although the case detail/step will show as 'submitted' at this point, the case has not been routed and it is still assigned to you as the owner. The SF-52 will need to be digitally signed in Block 5 and the case will need to be 'reassigned' to the 2<sup>nd</sup> line supervisor for concurrence and signature in Block 6a then forwarded through reassignments within the chain of approval.

## Classify/Recruit

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

### Selected Employee

No employee selected.

[New Case](#)

Assigned to Me

Initiated by Me

All Cases

Tracking Number	Activity	Detail/Step	HR Comments	Date & Time	Owner	PCNs	Title	Series	Grade	Prop. Eff. Date	Vacancy Announcement #
<input type="text" value="Enter keyw"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Enter Name"/>						<input type="text" value="Enter keyword"/>
<a href="#">Expand View</a>	<input checked="" type="checkbox"/> Open Cases Only	<a href="#">Submit Search Query</a>	<a href="#">Clear Search Form</a>	<a href="#">Previous Page</a>	<a href="#">Next Page</a>	Displaying page 1 of 2					
<a href="#">5021</a>	Recruitment Request	Submitted		04/12/2017 03:15:41 PM	JOHNSON, CARNITTA	00008558	Criminal Investigator	1811	13	01/09/2017	1
<a href="#">5017</a>	Recruitment Request	Submitted		04/11/2017 01:48:43 PM	TATE, BARRY	00110011	Training Specialist	1712	11	01/15/2017	
<a href="#">5016</a>	Recruitment Request	Submitted		04/11/2017 12:49:34 PM	SULLARD, THOMAS		CSM Program Manager	0343	13	01/16/2017	
<a href="#">5015</a>	Classification	Submitted		04/10/2017 11:01:29 AM	BASEY, TEST	000001, 00002	Accountant	0501	09	01/10/2017	
<a href="#">5010</a>	Recruitment Request	Resource Coordinator Approval		04/03/2017 10:18:12 AM	SHIELDS, SHARON		tst	0301	01	01/02/2017	
<a href="#">5009</a> *	Recruitment Request	Management Approval		04/03/2017 10:05:24 AM	BASEY, TEST	0000000	test	0301	01	01/02/2017	

Details for e-signing and reassigning Recruitment Requests are provided in the next section.

## Classify/Recruit

# CG-2017-00072

The following information will automatically flow to all attached forms. Please upload additional attachments using 'Upload New Document'.

**NOTE:** Before the request can be approved, the bold fields should be completed.

[Add Step/Comments/Reassign](#) [Close Case](#) [View History](#) [Back](#)

### Case #5015

Owner:	BASEY, TEST
Case Type:	Classify/Recruit
Case Activity:	Classification
Last Detail/Step:	Submitted
Last Updated By:	BASEY, TEST
	4/10/2017 11:01 AM
HR Comments:	
HR Only Comments:	
<b>Case Information</b>	
Vacancy Announcement #:	<input type="text"/>

### Documentation

[Recruitment](#)  
• [SF 52](#) [Audit Log?](#)

### Attachments

[Upload New Document](#)

### To Be Notified List

The following email addresses will receive a email when this case is updated:

[Add/Edit Notify List](#)

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- iv. Enter your CAC PIN or FedHR Navigator password if you are not using the CAC then click on the **Submit** button.

- v. Click **Save** at the top right of the screen then select 'Previous Screen' to return to case information page so it can be reassigned for 2<sup>nd</sup> line supervisor's concurrence and signature.
2. **Request Created/Vacancy Identified:** 1<sup>st</sup> Line Supervisor routes to 2<sup>nd</sup> Line Supervisor after signing SF-52 and selecting new Detail/Step from the drop down menu:
    - a. Click Add Step/Comments/Reassign



- b. Select new detail/step option: **Request Created/ Vacancy Identified**

- c. Insert comments to provide additional information regarding the specific information related to this case
- d. Select your preference for sending e-mail to Requestor (Yes or No)
- e. Update the Notify by Email field to designate the stakeholders that should receive e-mails related to the status of the case.
- f. Assign this Case to: 2<sup>nd</sup> line supervisor

The contacts added to the 'Notify By E-mail' field will be notified each time the status of the case is updated unless you 'uncheck' the box next to their e-mail address

Note: The "Assign this case to" field will remain as "Myself" until you finish attaching documents, if required, and "save" your work.



- g. Add Attachments: *Upload all required documents (PD with OF-8, Recruitment Checklist, etc.)*



- h. Save you work; E-mail notifications will be sent, Owner information will be updated in case tracking view, and case information page will be updated with attachments or new e-mail notification contacts that were added (see screenshot below)

The same contacts can be notified each time the status of the case is updated. Add contact emails here using the "Add/Edit Notify List."

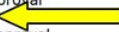
3. **Management Approval:** 2<sup>nd</sup> Line Supervisor routes to Resource Coordinator for review and authorization to proceed (using same steps as 1<sup>st</sup> line supervisor);
  - a. Open and digitally sign SF-52 in Block 6; save & click previous screen
  - b. Select new Detail/Step from case information page: **Resource Coordinator Approval**
  - c. Insert comments (optional)
  - d. Send an Email to Requester: select "Yes" from drop down
  - e. Add additional e-mail notification if necessary
  - f. Assign this case to: insert CRC's e-mail information
  - g. Add additional attachments if necessary




4. **Resource Coordinator Approval:** CRC forwards by reassigning to HR Servicing Specialist (follow steps above 1a through 1f) and updating the Step:
  - a. Open and digitally sign SF-52 in Part C, Block A; save & click previous screen
  - b. Select new Detail/Step from case information page: **Request Returned to HR**
  - c. Insert comments (optional)
  - d. Send an Email to Requester: select “Yes” from drop down
  - e. Add additional e-mail notification if necessary
  - f. Assign this case to: insert HR Specialist’s e-mail information
  - g. Add additional attachments if necessary
5. **Request Returned to HR:** HR Servicing Specialist reviews package for completeness...
  - a. If complete, HR Specialist will forward a notification that complete package has been received and the recruitment process has begun.
  - b. Case Activity Detail/Step will remain the same until package is ready for Servicing Branch Chief Approval
  - c. HR Specialist will review the position against the PAL to confirm the position is authorized and vacant. Comments will be updated to include confirmation of receipt and additional information as necessary
  - d. If changes are required or additional documentation is needed, the HR case owner will:
    - i. Reassign the case back to the 1<sup>st</sup> line supervisor;
    - ii. Changes activity to: **Request Create/Vacancy Initiated**; and
    - iii. Update the comments section to include the specifics of what is needed
    - iv. E-mail notification will be generated when work is saved.
6. **Request Create/Vacancy Initiated:** HR returned to requestor for additional information or documentation.
7. **Request Returned to HR:** provides requested information or documentation and resubmits to HR Specialist from case information page
  - a. Select Add Step/Comments/Reassign
  - b. Select new detail/step option: **Request Returned to HR.**





Add Detail/Step	
<b>Detail/Step</b>	Select
<b>Comments</b>	Request Created/ Vacancy Identified Management Approval Resource Coordinator Approval Request Returned to HR  Servicing Branch Chief Approval Job Analysis Completed Job Opportunity Announcement (JOA) Drafted JOA - Management Approval JOA - Opened JOA - Closed
<b>HR Only Comments</b>	Applications Reviewed Certificate(s) Created Certificate(s) Sent to Hiring Official Certificate(s) Returned from Hiring Official Tentative Selection/Offer Personnel Security Physical/Drug Testing
<b>Send an Email to Requester?</b>	Selectee Requesting Recruitment/Relocation Recruitment/Relocation Sent to Hiring Official Recruitment/Relocation Returned by Hiring Official
<b>Notify By Email:</b>	Recruitment/Relocation Adjudicated by HR Entry on Duty Date Set Initiate Onboarding
Assign this case to:	

- c. Send an Email to Requester: select “Yes” from drop down
  - d. Add additional e-mail notification names if necessary
  - e. Assign this case to: insert CRC’s e-mail information
  - f. Add additional attachments if necessary
  - g. Save; e-mail notification will be generated; Owner information will be updated
8. **Request Returned to HR:** HR Servicing Specialist reviews package for completeness...
- a. HR Specialist will forward a notification that complete package has been received and the recruitment process has begun.
  - b. Comments will be added confirming receipt by HR and indicating who the point of contact is.

Add Detail/Step	
<b>Detail/Step</b>	Select
<b>Comments</b>	Request Created/ Vacancy Identified Management Approval Resource Coordinator Approval Request Returned to HR  Servicing Branch Chief Approval Job Analysis Completed Job Opportunity Announcement (JOA) Drafted JOA - Management Approval JOA - Opened JOA - Closed
<b>HR Only Comments</b>	Applications Reviewed Certificate(s) Created Certificate(s) Sent to Hiring Official Certificate(s) Returned from Hiring Official Tentative Selection/Offer Personnel Security Physical/Drug Testing
<b>Send an Email to Requester?</b>	Selectee Requesting Recruitment/Relocation Recruitment/Relocation Sent to Hiring Official Recruitment/Relocation Returned by Hiring Official
<b>Notify By Email:</b>	Recruitment/Relocation Adjudicated by HR Entry on Duty Date Set Initiate Onboarding
Assign this case to:	

- e. HR Specialist or contractor reviews submission and confirms receipt with notification to supervisors, resource coordinator, and additional personnel as appropriate. Case Activity Detail/Step will remain the same until package is ready for Servicing Branch Chief Approval



9. If the case is reassigned within HR or returned for any reason a status e-mail notification will be forwarded from the HR Specialist to all stakeholder identified in the e-mail notification fields in previous steps in case history. Notifications will be provided as the case progresses through the recruitment process. Additional information on the detail/steps and definitions are provided in Appendix 6.

### **6.5. Recruitment Request Complete**

HR Specialist will close the case and notify Stakeholders when the applicant reports for duty or it is determined that vacancy will not be filled.

- a. Notifications will be generated based on HR Specialist notification selections (Supervisors, Resource Coordinators, and all stakeholders)
- b. FedHR case status will be changed to Closed (status notification e-mail will be generated to case requestor).

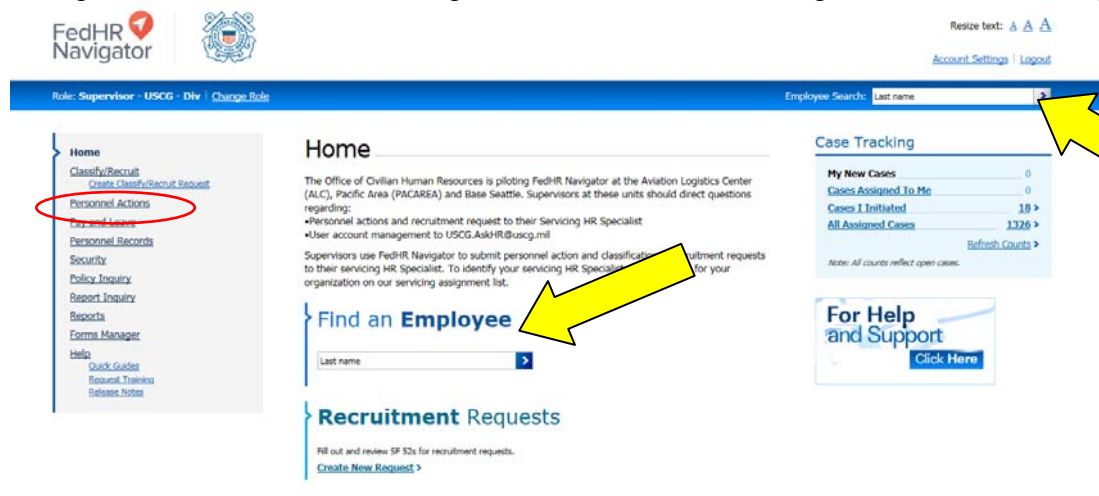


## Section 7 - Personnel Action Requests

### 7.1. Personnel Action Request Introduction

This section provides instruction for requesting and tracking the most common nature of actions used for Personnel Action Requests including Awards, Position Changes (Promotion, Reassignments, Detail, Temporary Assignments, etc.), and resignations.

It is important to note that Personnel Action Requests must be received in HR on or before the last day of the pay period prior to the proposed effective date. Links to Pay Period calendars are provided on the CG-121 webpage. Additional guidance related to Personnel Action Requests is located in Chapter 4 of the the Guide to Personnel Processing on the Office of Personnel Management website (www.OPM.gov ) and The Civilian Hiring Guide (CG-121 webpage)



Personnel Action Request cases can be created using the navigation menu (left side of the screen) or by searching the employee name in either of the two search fields provided on the home page (identified by the arrows above).

Contact your servicing specialist for specific guidance if you are unsure of which type of action to request.

### 7.2. Search by Employee Name to Track Existing Cases or Initiate New Case

To search all cases by employee name or initiate a new Personnel Action associated with a specific employee there are two options (identified by yellow arrows above):

- 1) type last name in the **Employee Search** field located in the blue banner at the top of page;
- 2) enter the employee's Last Name in the **Find an Employee** field and enter to begin the search filter. Type in Employee Name (name will populate in Case View and will be saved for use when selecting case types from navigation screen)



## Find an Employee

Test, test x >

### Employee Search

You may search for an employee by Name or POI. To perform a search, enter the search criterion, select the type of search from the list, and click on the Search button. Click on the employee's name that you want.

Search  for

Name	POI	Request Date / SVC History	SCD	Quick Actions
<a href="#">TEST, TEST</a>	2783	03/18/2008		<a href="#">View Cases</a> <a href="#">New Case</a>
<a href="#">TEST, TEST</a>	2783			<a href="#">View Cases</a> <a href="#">New Case</a>
<a href="#">TEST, TEST</a>	2783			<a href="#">View Cases</a> <a href="#">New Case</a>

Selected **View Cases** from the corresponding row to view all cases associated with the employee list in the Name column or select the **New Case** to initiate a personnel action.

The employee search page opens with rows of employee names that match what was entered in the employee search field. Locate the employee name you are searching for and select either **view cases** or **open new** cases from the Quick Actions column. (If you click on the employee name the hyperlink will open to the employee profile but you cannot initiate or view the cases from the profile.)

The screenshot shows the FedHR Navigator interface. On the left is a sidebar with navigation links. The main content area is titled 'Employee Search'. Below the title is a search bar and a table of results. The table has five columns: Name, POI, Request Date / SVC History, SCD, and Quick Actions. The first row of results is for 'TEST, TEST' with POI 2783 and a request date of 03/18/2008. The 'Quick Actions' column for this row contains two links: 'View Cases' and 'New Case'. A yellow arrow points to the 'View Cases' link.



## 7.2(a) View Cases for specific employee

### Test, Test - Case Tracking

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

#### Selected Employee

Test, Test  
(00-00-0000-00-00-00-00)

[New Case](#)

Assigned to Me	Initiated by Me	All Cases					Employee - Assigned to Me	Employee - All Cases
Tracking Number	Case Type	Activity	Detail/Step	HR Comments	Date & Time			
<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="mm/dd/yyyy"/>		<input type="text" value="Enter Name"/>	
<a href="#">Expand View</a>	<input type="checkbox"/> Open Cases Only	<a href="#">Submit Search Query</a>	<a href="#">Clear Search Form</a>					
<a href="#">7597</a>	Personnel Actions	Process Forms <a href="#">View Forms</a>	Closed		06/13/2016 06:43:03 AM		<a href="#">Test, Test</a>	
<a href="#">5490</a>	Personnel Actions	Process Forms <a href="#">View Forms</a>	Closed		10/02/2014 03:00:17 PM		<a href="#">Test, Test</a>	

Your search returned 2 cases.

After selecting **view cases** the case tracking page associated with the employee opens to the Employee All Cases view. You can search, sort, and filter the case displayed (see case tracking section for additional information). To open a specific case, click on the blue case tracking number hyperlink. You also have the option to select the hyperlink to view forms for a specific case.

## 7.2(b) Create New Case window opens after selecting the “New Case” link.

Click on ‘**New Case**’ on the corresponding row of the employee you searched for. The Create New Case window will open with several mandatory fields to populate (identified by bold font).

[Home](#)  
[Classify/Recruit](#)  
[Create Classify/Recruit Request](#)  
[Personnel Actions](#)  
[Pay and Leave](#)  
[Personnel Records](#)  
[Security](#)  
[Policy Inquiry](#)  
[Report Inquiry](#)  
[Reports](#)  
[Forms Manager](#)  
[Help](#)  
[Quick Guides](#)  
[Request Training](#)  
[Release Notes](#)

### Create New Case

Selected Employee: **Test, Test**  
[Personal Info Page >](#)

Send an Email to Employee?

Notify By Email:

[Add](#)

Case Type

Activity

Detail/Step

Select the form(s) for this case

There are no forms to be included for case type **Select** and activity: **(select Activity)**

Comments

(Entries here are visible to the employee)

HR Comments

(Entries here are NOT visible to the employee)

HR Only Comments

(Entries here are visible to the HR only)

Date & Time

03/13/2017 09:03:15 EDT

Employee

Test, Test

Organization

(00-00-0000-00-00-00-00)

Attachment, if any

For security reasons, the user must log in to FHR Navigator to view the attachment. The attachment is NOT sent along with the email.

[Add another file](#)

[Browse...](#)

Assign this case to

**Myself**

To assign case to another person, enter name here...

[Save and Next Screen](#)

[Cancel](#)

- Send an E-mail to Employee** (Mandatory) Select No (in this case you are the requestor).
- Notify by E-mail:** Add additional emails addresses in the Notify By Email field.




- iii. Select the “**Case Type**”, “
- iv. Select the **Activity** from the drop-down menu (**Mandatory**)
- v. Select the **Detail/Step**” from the drop-down menu (**Mandatory**). NOTE: If you create the new case from the Navigation Menu>Personnel Action instead of the name search field instead of the you will not have to select case type Personnel Action)
- vi. **Comments: (Mandatory)** Enter any instructions or comments for the person to whom you are assigning the case.
- vii. If applicable you may attach any document by browsing. Resignation requests will require a copy of the written
- viii. **Assign this Case to:** Leave as **Myself** until after you have updated the SF-52 and digitally signed it.
- ix. Click ‘**Save and Next Screen**’
- x. Once the Case has been created and saved, proceed to the Form Folder section (on upper right side of case information page) to populate block 1 and sign the SF 52.

## Personnel Actions

This page lists the details of the case. From here, you can view the case history and any forms that are associated with the case.

[Add Step/Comment/Reassign](#) [Close Case](#) [View History](#) [Back](#)

### Case #18371

<b>Employee:</b>	<a href="#">Test, Test</a>
<b>Owner:</b>	LECQUE, THAYER
<b>Case Type, Activity:</b>	Personnel Actions, Process Action in the Personnel/Payroll System
<b>Last Detail/Step:</b>	Process Action in the Personnel/Payroll System
<b>Last Updated By:</b>	LECQUE, THAYER 3/13/2017 10:45 AM
<b>Comments for Employee:</b>	
<b>HR Comments:</b>	
<b>HR Only Comments:</b>	
<b>Hidden from Employee:</b>	<b>No</b> 

**Case Information**

**Effective Date:**

[Save](#) [Back](#)

### Forms Folder

PersonnelActions0313171003

• [SF 52](#)

[Manage/Edit Forms >](#)

### Attachments

[Upload New Document](#)

### To Be Notified List

The following email addresses will receive an email when this case is updated:

*The list is empty.*

[Add/Edit Notify List](#)

Note: The default for the **Hidden from Employee** field is currently set to No, meaning the employee will be able to search actions by their name and see the cases in progress. Most personnel action requests should be hidden until they have been approved and processed by human resources.





### 7.3. Signing SF-52 and Reassigning Personnel Action Request/Case

Click on the appropriate **e-Sign** button(s) to digitally sign the SF-52 before routing/reassigning to the next person in the approval chain.

Note: Block 1 will not auto-populate in Part A of the Personnel Action Requests. 1<sup>st</sup> level supervisor will have to type in the specific nature of action being requested.

The screenshot shows the SF-52 form with several key areas highlighted for signing:

- Part A - Requesting Office:** Includes fields for 1. Action Requested (Recruitment), 2. Request Number (2010-00018), 3. For Additional Information Call (Name and Telephone Number), 4. Proposed Effective Date (07/01/2011), 5. Action Requested By (Typed Name, Title, Signature, and Request Date), and 6. Action Authorized By (Typed Name, Title, Signature, and Concurrence Date).
- Part B - For Preparation of SF50 (Do not enter in FPM Supplement 292-1. Show all dates in month-day-year order.):** Includes fields for 1. Name (Last, First, Middle), 2. Social Security Number, 3. Date of Birth, and 4. Effective Date.
- Part C - Reviews and Approvals (Not to be used by requesting office.):** Includes a table for approvals with columns for Office Function, Initials, Signature, and Date. The table is divided into two sections: 1. Office Function and 2. Approval. The 1st Line Supervisor and 2nd Line Supervisor are indicated for the first section.
- Part D - Remarks by Requesting Office:** Includes a section for "Remarks by Requesting Office" with a text area for providing details about the action requested.
- Part E - Employee Resignation/Retirement:** Includes a section for "Remarks by Requesting Office" with a text area for providing details about the resignation or retirement.

If you are unsure of the nature of action to request in Part 1 Block 1 contact your servicing HR Specialist.

**Awards Requests** require award amounts to be typed in for block 20 and justification to be included in Part D – Remarks by Requesting Office (see below). Only **On-The-Spot** and **Special Act** awards are processed in FedHR; follow the performance management guidance for year-end performance award submission.

The screenshot shows the SF 52 sample 3.pdf in Adobe Acrobat Standard. The form is titled "UNCLASSIFIED". The main content area displays the following sections:

- PART D - Remarks by Requesting Office:** Includes a section for "Remarks by Requesting Office" with a text area for providing details about the action requested. The text area contains a sample recommendation for a Special Act Award/On the Spot for an employee named Mr./Ms. (Group).
- PART E - Employee Resignation/Retirement:** Includes a section for "Remarks by Requesting Office" with a text area for providing details about the resignation or retirement.





Resignation personnel action requests will also require information in Part D for the reason the employee is resigning.

After clicking the **e-Sign** button, you will be asked to confirm your intent to sign. Click on the **Yes** button.

A screenshot of the FedHR Navigator interface showing a confirmation dialog box. The dialog box has a blue header with the text "Do you want to e-Sign here?" and a "Close" button. The main content area asks "Do you want to e-Sign here?" with "No" and "Yes" buttons. The background shows a form titled "Standard Form 12" with fields for "PART A - Requesting Office (Also complete Part B, Items 1-4)" and "PART B - Requesting Office (Also complete Part A, Items 1-4)".

Enter your CAC PIN or FedHR Navigator password if you are not using the CAC then click on the **Submit** button.

A screenshot of the FedHR Navigator interface showing a confirmation dialog box. The dialog box has a blue header with the text "e-Sign Confirmation" and a "Close" button. The main content area asks "Please enter your password used to login to the FHR Navigator for security purposes." with a password field and a "SUBMIT" button. The background shows the same form as the previous screenshot.

Click **Save** at the top right of the screen then select 'Previous Screen' to return to case information page.



## 7.4 Routing/Reassigning Personnel Action Request

After creating the case, saving your changes, and updating/signing the SF-52, you will be returned to the case information page.

The screenshot shows the FedHR Navigator interface. The main heading is 'Personnel Actions'. Below it, a sub-heading says 'This page lists the details of the case. From here, you can view the case history and any forms that are associated with this case.' A red circle highlights the 'Add Step/Comment/Reassign' button. To the right of this button are links for 'New Case', 'View History', and 'Back'. Below these links, the case details for Case #19404 are displayed. The details include Employee: Test, Test2; Owner: BASEY, DONNA; Case Type, Activity: Personnel Actions, Personnel Action Inquiry; Last Detail/Step: Personnel Action Inquiry; Last Updated By: BASEY, DONNA; and Comments for Employee: Reassignment to PCN: #####, proposed effective date #####, Organization Name/Level: #####. There is also a section for HR Comments and a 'Case Information' section with an 'Effective Date' field. On the right side of the page, there are sections for 'Forms Folder' (showing SF 52), 'Attachments' (with an 'Upload New Document' button), and 'To Be Notified List'.

The next steps to route for signature and submit to human resources office are:

1. 1<sup>st</sup> Line Supervisor routes to 2<sup>nd</sup> Line Supervisor after signing SF-52 and selecting new Detail/Step from the drop down menu:
  - a. Click Add Step/Comments/Reassign (circled in red above)
  - b. **Send an Email to Employee? (Mandatory)** Yes or No
  - c. **Notify by Email:** include stakeholder e-mail address
  - d. Select new **Detail/Step** option: **Process Action in the Personnel/Payroll System**
  - e. **Comments:** insert comments to provide additional information regarding the details related to this case (**Mandatory**) (for instance, if this is a reassignment include new division/branch organization level, PCN, etc., related to the new position the employee is being reassigned to)



f. Assign this Case to: type in 2<sup>nd</sup> line supervisor e-mail information

The contacts added to the 'Notify By E-mail' field will be notified each time the status of the case is updated unless you 'uncheck' the box next to their e-mail address

Note: The “Assign this case to” field will remain as “Myself” until you finish attaching documents if required and “save” your work



- g. Add Attachments: *Upload all required documents (PD with OF-8, Recruitment Checklist, etc.)*

- h. Save you work; E-mail notifications will be sent, Owner information will be updated in case tracking view, and case information page will be updated with attachments or new e-mail notification contacts that were added (see screenshot below)

The same contacts can be notified each time the status of the case is updated. Add contact emails here using the "Add/Edit Notify List."

2. **Management Approval:** 2<sup>nd</sup> Line Supervisor routes to Resource Coordinator for review and authorization to proceed (using same steps as 1<sup>st</sup> line supervisor);
- Open and digitally sign SF-52 in Block 6; save & click previous screen (refer to Section 7.2 for more detailed instructions)
  - Add additional e-mail notification if necessary **Send an Email to Employee? (Mandatory)** Yes or No
  - Select new Detail/Step from case information page: **Process Action in the Personnel/Payroll System**
  - Insert comments (optional)



- e. **Assign this case to:** insert CRC's e-mail information for Awards or other actions requiring CRC review (refer to your organizational processes); if CRC review is not required at this assign to the HR servicing specialist
- f. Add additional attachments if necessary
- g. **Save**

3. HR Servicing Specialist reviews package:

- f. If complete, HR Specialist will forward a notification that complete package has been received and the classification process has begun.
- g. Case Activity Detail/Step will remain the same
- h. Comments will be updated to include confirmation of receipt and additional information as necessary
- i. If changes are required or additional documentation is needed, the HR case owner will communicate within FedHR by adding steps and updating comments until final notification that action has been processed and applied at NFC.



## **7.5. Personnel Action Request Complete**

After the personnel action has been input and processed within the personnel action database and confirms that action applied correctly with the National Finance Center, the HR Specialist will update the cases status and notify the Supervisor and CRC:

- a. Notifications will be generated based on HR Specialist notification selections (Supervisors, Resource Coordinators, and other stakeholders including employee if appropriate);
- b. FedHR case status will be changed to Closed.



## Section 8 - Pay and Leave [Future Release]

### Pay and Leave

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

#### Selected Employee

Test, Test  
(00-00-0000-00-00-00-00)  
[New Case](#)

Assigned to Me		Initiated by Me		All Cases		Employee - Assigned to Me		Employee - All Cases	
Tracking Number		Activity		Detail/Step		HR Comments		Date & Time	
<input type="text" value="Enter keyword"/>		<input type="text" value="Enter keyword"/>		<input type="text" value="Enter keyword"/>		<input type="text" value="Enter keyword"/>		<input type="text" value="mm/dd/yyyy"/>	
<input type="button" value="Expand View"/>		<input type="checkbox"/> Open Cases Only		<input type="button" value="Submit Search Query"/>		<input type="button" value="Clear Search Form"/>		<input type="text" value="Enter Name"/>	
No cases to track.									





## **Section 9 - Policy Inquiry [Future Release]**



## Section 10 - Security [Future Release]

### Security

Open a case by clicking on the tracking number to see case history, comments, and other information. Click a column label to sort records by it. Enter multiple keywords to search multiple columns at the same time. New cases are marked with an asterisk \*.

### Selected Employee

Test, Test  
(00-00-0000-00-00-00-00)  
[New Case](#)

Assigned to Me	Initiated by Me	All Cases					Employee - Assigned to Me	Employee - All Cases
Tracking Number	Activity	Detail/Step	HR Comments	Date & Time	Employee			
<input type="text" value="Enter keyw"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="Enter keyword"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Enter Name"/>			
<a href="#">Expand View</a>	<input type="checkbox"/> Open Cases Only	<a href="#">Submit Search Query</a>	<a href="#">Clear Search Form</a>					
No cases to track.								



## Section 11 – Reports

### 11.1. Reports Introduction

The FedHR reports module provide standard and ad hoc reports to meet management reporting requirements. It provides data views and report summary outputs in either PDF or downloadable excel formats. FHR Navigator has a variety of different reports that are associated with certain modules for which customers need management information. This document describes how to use the Reports Functions of FHR Navigator to efficiently access these valuable accessory tools. Note: If your agency does not subscribe to particular modules (for example, Case Tracking) those reports will not be available to you. However, all FHR Navigator customers have access to the “Users” Report. A link to the Reports function will be found on the left-side menu

### 11.2. Reports Available in the Reports Function

The list below is illustrative, since management reports continue to be developed and modified. It represents typical report titles and descriptions available to FHR Navigator users, depending on the modules their agency subscribes to, and on the viewing privileges afforded to their “role” by their agency.

**Case Tracking**

<a href="#">Cases and Details Grouped by Status</a>	This report lists all history for each case tracking item that matches your search criteria. Cases are ordered by open or closed status.
<a href="#">Cases Assigned to Me</a>	This report lists all cases assigned to the user running the report. The cases are grouped by type and open or closed status.
<a href="#">Cases Grouped by Activity</a>	This report lists cases grouped by activity (e.g., process forms)
<a href="#">Cases Grouped by Case Detail/Step</a>	This report lists cases grouped by case detail/step (e.g., Process Forms).
<a href="#">Cases Grouped by Case Owner</a>	This report lists all cases grouped case owner.
<a href="#">Cases Grouped by Case Type</a>	This report lists all cases grouped by their case type (e.g., Retirement).
<a href="#">Step Duration Report</a>	Shows the progress of cases by listing how many days the case spent in each step.

**Hiring**

<a href="#">USCG Recruitment Requests Grouped by Case Owner</a>	This report lists Recruitment Requests grouped by current owner of the Recruitment Request.
<a href="#">USCG Recruitment Requests Grouped by Organization</a>	This report lists Recruitment Requests grouped by organization.

**Cases and Details Grouped by Status:** This report lists cases grouped by the current status of the case and within a specified date range. The date range tells the program to select all cases that have been edited within the specified date range. This report also displays all the details of a case

**Cases Assigned to Me:** This report lists the cases that are assigned to the user running the report. The cases are grouped by type and open or closed status.



**Cases Grouped by Activity:** This report lists cases grouped by activity (e.g., process forms).

**Cases Grouped by Activity with all Case History:** This report lists all case history grouped by activity. This report includes all case history

**Cases Grouped by Case Detail/Step:** This report lists cases grouped by case detail/step (e.g., Process Forms).

**Cases Grouped by Case Owner:** This report lists all cases grouped by their owners for a specific role (e.g., HR Specialist). For each case, the report shall display only the last detail/step of the case.

**Cases Grouped by Case Type:** This report lists all cases grouped by their case type (e.g., Retirement).

**Cases with Specific Step:** This report lists cases that have a particular combination of case type, activity, and detail/step. For each case, the report shall display only the last occurrence of the detail/step indicated in the parameter.

### 11.3. Filtering FedHR Navigator Case Tracking Reports

The largest group of FedHR Navigator reports pertain to the Case Tracking module. Depending on the needs of the manager, reports can be filtered in different ways. Here are some highlights:

Cases Grouped by... - These basic reports list all assigned cases grouped by case type, owner, step, and other information. Each report has a summary based on the grouping that shows the number of cases in each group that meet your search criteria.

- Cases Grouped by Case Type
- Cases Grouped by Activity
- Cases Grouped by Step
- Cases Grouped by Owner
- Cases Assigned to Me
- Cases with Specific Step – Requires a case type, activity and step, and returns a list of all occurrences of the step for all cases in the selected activity



Most reports can be filtered by the following search parameters:

- Case Type – Identifies the type of work performed
- Activity – Identifies the type of work performed at a more detailed level than Case Type
- Detail/Step – The step a case is currently in. Most cases flow through several steps before closing
- Status – Whether the case is open or closed
- Last Edit Date – When the case was last updated
- Case Created Date
- Owner – The owner of the case
- Performance Metrics – Ability to flag cases that do not meet performance standards
- Open longer than a certain number of days
- Not updated in more than a certain number of days but still open

#### 11.4. Report Formats

Reports can be downloaded in several different formats. The preview always shows the PDF format. The available formats include:

- PDF – Includes graphics and summary information. Non editable and printer friendly.
- MS Word – Similar to the PDF format, but in an editable format
- Excel – includes just the data without any graphics to make it easy to work with in Excel.
- CSV – this is a text format that may be useful if you need to plug your data into a different system or process

##### **Report Example #1: Cases Grouped by Case Type**

This report lists case information for all cases that meet the search criteria and provides a summary at the end of the report that is broken down by Case Type. Some examples of ways to filter the report include:

- Created in the past month
- Last edited in the past month
- Closed in the past month
- Assigned to one or more selected individuals
- Flag or highlight cases that took longer than 30 days to complete
- Flag cases that have not been worked on in more than a week



**Cases Grouped by Case Type** This report lists all cases grouped by their case type (e.g., Retirement).

\* Case Status: All

Last Edit Date: to

Create Date: 10/24/2012 to

Owner Name: ☒ CONTRACTOR, KIMBERLY <kimberly+first@econsys.com>  
*Last name, First name* ☒ KETTNER, KIMBERLY <kimberly+1@econsys.com>  
 To add another case owner, enter name here...

Flag Cases: ☒ Open longer than 70 days  
*Highlight cases that do not meet a selected performance metric* ☒ Not updated in more than 30 days but still open

Download Report As: PDF  
☐ Summary Only

Required fields are marked with an asterisk \*.

[Preview Report](#) [Download Report](#) [Cancel](#)

Figure 1 - Search criteria for the Cases Grouped by Case Type Report

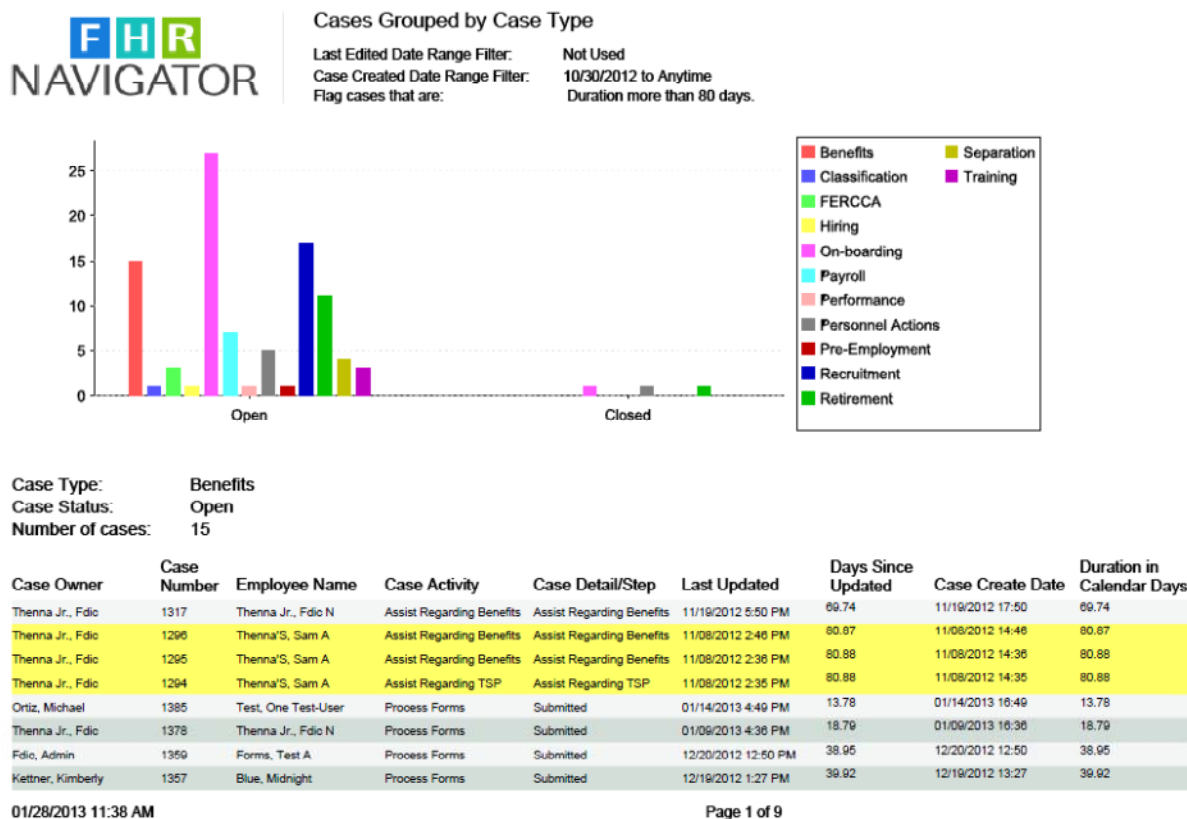


Figure 2 – Cases Grouped by Case Type report in PDF format.



The report includes a bar graph that shows the workload broken down by case type, followed by detailed information about each case, and a summary at the end that includes statistics broken down by case type. The detailed listing of the cases highlights cases that are flagged. Flagged cases do not meet performance criteria that are part of the parameters for the report.

If desired, you can run the report in summary-only mode which will produce the graph and the summary statistics. The summary statistics include the following information for each case type and open or closed status:

- Number of cases
- Average duration – number of days between when the case was created to today or when the case was closed
- Number of cases flagged – number of cases that do not meet performance criteria
- Percent of cases flagged – percent of cases that do not meet performance criteria
- Percent performance met – percent of cases that meet performance criteria

The screenshot shows a web-based form titled "Cases Grouped by Case Type (#304)". A subtitle reads: "This report lists all cases grouped by their case type (e.g., Retirement)." The form contains several sections: a "Case Status" dropdown set to "All"; "Last Edit Date" and "Create Date" (pre-filled with "10/30/2012") range selectors; an "Owner Name" text box with the placeholder "Last name, First name"; a "Flag Cases" section with two checkboxes: "Open longer than 80 days" (checked) and "Not updated in more than [ ] days but still open" (unchecked); a "Download Report As:" dropdown set to "PDF"; and a "Summary Only" checkbox which is checked and circled in red. A note at the bottom states: "Required fields are marked with an asterisk \*." At the very bottom are three buttons: "Preview Report", "Download Report", and "Cancel".

Figure 3 - The 'Summary Only' flag will result in summary statistics of the data without listing information about each case individually



**U.S. Coast Guard  
Office of Civilian Human Resources  
FedHR Navigator  
Supervisor Guide**



Cases-Grouped-by-Case-Type (-304)-23.pdf - Adobe Reader

File Edit View Document Tools Window Help

2 / 3 76.8%

	Open					Closed					Total				
	Number of Cases	Average Duration	Number of Flagged Cases	% Cases Flagged	% Performance Met	Number of Cases	Average Duration	Number of Flagged Cases	% Cases Flagged	% Performance Met	Number of Cases	Average Duration	Number of Flagged Cases	% Cases Flagged	% Performance Met
Benefits	15	59.44	3	20.00%	80.00%	0	N/A	N/A	N/A	N/A	15	59.44	3	20.00%	80.00%
Classification	1	58.93	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	58.93	0	0.00%	100.00%
FERCCA	3	37.73	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	3	37.73	0	0.00%	100.00%
Hiring	1	62.07	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	62.07	0	0.00%	100.00%
On-boarding	27	45.17	3	11.11%	88.89%	1	8.88	0	0.00%	100.00%	28	43.87	3	10.71%	89.29%
Payroll	7	36.53	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	7	36.53	0	0.00%	100.00%
Performance	1	75.97	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	75.97	0	0.00%	100.00%
Personnel Actions	5	52.28	0	0.00%	100.00%	1	9.00	0	0.00%	100.00%	6	45.06	0	0.00%	100.00%
Pre-Employment	1	67.93	0	0.00%	100.00%	0	N/A	N/A	N/A	N/A	1	67.93	0	0.00%	100.00%

Figure 4 – Summary statistics broken down by cases type. For each case type, the summary shows the number of cases, average duration, number of cases flagged, and percent of cases that meet performance standards.



## **Section 12 – Appendices**

Appendix 1 – Definitions (Future Release)

Appendix 2 - Case Types Available in FedHR Navigator

Appendix 3 - HR References and Links

Appendix 4 - Editing and Digitally Signing the SF-52

Appendix 5 – Classification Request Detail/Steps

Appendix 6 - Recruitment Phases/Activity Step Definitions

Appendix 7 - Personnel Action Request Types/Case Step

Appendix 8 – Pay and Leave Request Types/Case Step Matrix

Appendix 9 - Editing and Digitally Signing the SF-52

Appendix 10 - Rules of Behavior



## **Appendix 1 – Definitions (Future Release)**



## Appendix 2 - Case Type

Case Type	Activity	Detail/Step
Classify		Refer to Appendix 5
Recruit		Refer to Appendix 6
Pay and Leave	Activity	Detail/Step
	Change of Employee Address	Change of Employee Address
	Debt	Court Order Establish Bill Garnishment Deposit Waiver Request Place on Hold Other Debt
	Leave	Leave Inquiry Leave Audit
	LES	Submission of Prior LES LES Inquiry
	Pay Inquiry	Pay Inquiry COLA Incentives Correction Required
	Earning and Leave Questions	Respond to Earnings and Leave Questions
	Tax	Federal Tax State/Local Tax Correction required
	Union Dues	Union Dues Withhold Union Dues Cancel Union Dues Inquiry
	W-2	W-2 Inquiry
	WebTA	WebTA Password reset WebTA Supervisor account request WebA Inquiry Corrected timecard needed
	Comp Time Payment	Prepare Review Process
	Lump Sum Pay	Prepare Review Process
	Quick Service Request	Prepare Transfer to NFC Process
	Settlement	Prepare Review Process

**U.S. Coast Guard**  
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	Salary (Faculty)	Prepare Review Process
	VLTP	VLTP Application Review Application Decision VLTP Donations – Within Agency VLTP Donations – Not in Agency
	Disabled Vet Leave/Wounded Warrior FLA	Obtain VBA Documentation Adjudicate VBA Eligibility Process Personnel Action WebTA Team Action Notify Employee/TimeKeeper/Supv Other
<b>Personnel Actions</b>		
	Process action in the Personnel/Payroll System	Review action and supporting documentation
		Need Information/Correction
		Compute New Rate of Pay
		Determine NOA, Authority, OPM Remarks,
		Process Action in the Personnel/Payroll System
	Request Appointment	Request Appointment
	Personnel Action Inquiry	Personnel Action Inquiry
<b>Personnel Records</b>		
	Employee Data Inquiry	SF-50 Inquiry Data Integrity Fix/Inquiry Veterans Preference Service Computation Date Verify Employee data Correct employee data Employment Verification Other
	eOPF	eOPF Inquiry Add document(s) Review documents(s) Remove documents(s) Obtain eOPF Review transferred eOPF Other
	Organization/Assignment Inquiry	Verify organization assignment Correct Organizational assignment Inactivate an organization Other



## Appendix 3 – Human Resource References and Links

The Human Resource references and links provided in this appendix are accessible from the CG-Office of Civilian Hiring (CG-121) webpage: <http://www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-Human-Resources-CG-1/Civilian-Human-Resources-Diversity-and-Leadership-Directorate-CG-12/Civilian-HR/>

Please note - references to submission of HR requests through [uscg.ASKHR@uscg.mil](mailto:uscg.ASKHR@uscg.mil) in CG-121 HR references published prior to 15 June 17 are no longer valid; however, the AskHR help desk is still available to answer questions.

- Advisory Notices for Civilian HR (AnCHRs):
  1. Advisory Notices to All Personnel:  
<https://cg.portal.uscg.mil/units/cg121/SitePages/Home.aspx>
  2. Supervisory AnCHRs:  
<https://cg.portal.uscg.mil/units/cg121/ANCHR%20Supervisory/Forms/AllItems.aspx>
- Civilian Hiring Guide for Supervisors and Managers:  
[http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/Civilian\\_Hiring\\_Guide.pdf?ver=2017-03-06-111659-403](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/Civilian_Hiring_Guide.pdf?ver=2017-03-06-111659-403)
- FedHR and WebTA Role Management Request  
<https://cg.portal.uscg.mil/units/cg121/Lists/WebTARoleApplication/NewForm.aspx?RootFolder>
- FedHR Summary Page on CG-121 webpage: <http://www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-Human-Resources-CG-1/Civilian-Human-Resources-Diversity-and-Leadership-Directorate-CG-12/Civilian-HR/Other-HR-Topics/FedHR/>
- FedHR Supervisor Guide (CG-121 webpage>FedHR)  
<http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Other%20HR/FedHR-Supervisor-Guide.pdf>
- FedHR Navigator Home page (External Log in Screen):  
<https://fhrnavigator.com/frbweb/logon.do?operation=index&client=USCG>
- Guide to Processing Chapter 4 – Requesting and Documenting Personnel Action:  
<https://www.opm.gov/policy-data-oversight/data-analysis-documentation/personnel-documentation/processing-personnel-actions/gppa04.pdf>
- Manager's Guide to Position Classification: [http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Classification/Managers\\_Classification\\_Guide.pdf?ver=2017-04-21-113637-623](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/Classification/Managers_Classification_Guide.pdf?ver=2017-04-21-113637-623)
- SharePoint site for **Positions Descriptions** containing generic and standard civilian position descriptions (PDs).  
<https://cg.portal.uscg.mil/units/cg121/Position%20Descriptions/Forms/AllItems.aspx>,



- Office of Personnel Management: [www.OPM.gov](http://www.OPM.gov)
- Pay Period Calendar: [http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/pay\\_calendar2017.pdf?ver=2017-03-06-111713-653](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/pay_calendar2017.pdf?ver=2017-03-06-111713-653)
- Recruitment Action Checklist: [https://www.uscg.mil/civilianhr/staffing/docs/Recruitment Action Checklist Final.docx](https://www.uscg.mil/civilianhr/staffing/docs/Recruitment_Action_Checklist_Final.docx)
- Servicing HR Specialist Assignment: <http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/service.docx?ver=2017-03-23-143648-310>





## Appendix 4 - Frequently Asked Questions

- Are there user guides for FedHR Navigator?
- How do I logon to FedHR Navigator?
- What steps should I take if I do not receive my Validation Code for initial log in?
- Do I have to use the system to contact the HR office?
- What should I submit using FedHR Navigator?
- Where can I find a link to FedHR?
- How do new civilian employees obtain access to FedHR Navigator?
- Do military supervisors have access to FedHR Navigator?
- What should I do if I do not have a CAC card or I left my CAC card at home?
- Who do I contact if I have problems logging into FedHR Navigator?
- Where can I locate the completed Position Description and OF-8 to upload with Classification/Recruitment Requests?
- Can CRCs initiate HR Requests (cases) in FedHR?
- Why am I receiving so many e-mails
- Do I need to submit more than one recruitment request if I am going to fill more than one position in multiple locations

**Question:** Are there user guides for FedHR Navigator?

**Answer:** The [user guide](#) is available at [http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/FedHR\\_user\\_guide.pdf?ver=2017-03-06-111659-307](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/FedHR_user_guide.pdf?ver=2017-03-06-111659-307). After logging into FedHR, employees also have access to quick guides on the left-hand navigation bar. Customized USCG user guides are accessible from the CG-121 web pages.

**Question:** How do I logon to FedHR Navigator?

Login

The login page for FedHR Navigator. It features two tabs: "PIV Card or CAC" (selected) and "Username and Password". Under the "PIV Card or CAC" tab, there is a section for card readers with a "Please make sure your card is plugged into the reader." instruction. Below this, it says "Please insert your card and press the Login button below. If you do not have a card, please click the 'Username and Password' tab." A "Login" button is present. At the bottom, there is a "Bookmark this website" link. A small disclaimer at the bottom states: "By clicking on the Login button, you acknowledge that you have read the privacy act notice and licensing agreement."

**Answer:** Detailed logon procedures are found on page 2 of the user guide. An abbreviated set of logon instructions follows:

1. Visit <https://fhrnavigator.com/client/USCG> (remember to Bookmark the site)
2. Click the "Username and Password" tab



Login

PIV Card or CAC    Username and Password

**Important:** Starting 1/26/2015, the login process using username and password is changing to strengthen security. [More information >](#)

Please enter your username and password.

Username

Password

My Agency

[Register >](#)  
[Reset User Account >](#)  
[Click here if you are a first time user to this](#)

By clicking on the **Login** button, you **acknowledge** that you have read the [privacy act notice](#) and [licensing agreement](#).

**Login**

[Bookmark this website](#)

3. Then click the link titled “Register”
4. Follow the prompts to complete registration
5. After you have registered, your account will be automatically enabled for CAC logon. The next time you use the system, click the “PIV Card or CAC” tab and click “Login”

**Question:** What steps should I take if I do not receive my Validation Code for initial log in?

**Answer:** If you do not receive the validation code e-mail within 20 minutes of your initial log in session, check your junk mail folder in Microsoft Outlook before contacting AskHR Helpdesk at [uscg.AskHR@uscg.mil](mailto:uscg.AskHR@uscg.mil).

**Question:** Do I have to use the system to contact the HR office?

**Answer:** While we prefer to receive your engagement via FedHR, we will receive and respond to walk-in, phone, and email inquiries.

**Question:** What should I submit using FedHR Navigator?

**Answer:** A listing of case types and activities employees can initiate is found in the [user guide](#) (pages 10-11). Guidance initiating and tracking HR requests for Supervisors is provided in the FedHR Supervisor Guide accessible from the CG-121 Web page.

**Question:** Where can I find a link to FedHR?

**Answer:** If you bookmarked the system upon logon, check your favorites within the browser. FedHR is also linked from the [Office of Civilian Human Resources Portal Page](#) and the CG Portal main page. A link to FedHR, and various other systems, is also included in the standard email signatures for all Office of Civilian Human Resources staff.

**Question:** How do new civilian employees obtain access to FedHR Navigator?

**Answer:** For the time being, new civilian employee accounts are established in FedHR Navigator when their employment record is created in the National Finance Center database. This occurs during the same week that new employees receive their first pay-check (e.g. 3-weeks after entry on duty).



Upon completion of the FedHR On-boarding deployment plan (Electronic onboarding or eOnboarding), selectees for Coast Guard positions will gain access to FedHR Navigator during the hiring process.

**Question:** Do military supervisors have access to FedHR Navigator?

**Answer:** Military personnel that supervisor civilian employees will have supervisor roles in FedHR. Roles were created for Phase 4 implementation based on Supervisor Profiles in WebTA. Future access and profile changes will be completed based on the submission of role request form certified and digitally signed by the line supervisor or the requestor. (Additional information regarding the role management and the online request will be provided by HR prior to 15 June 17.)

**Question:** What should I do if I do not have a CAC card or I left my CAC card at home?

**Answer:** Access to FedHR Navigator requires multi-factor authentication. If you do not have a CAC card, you may use the “Username and Password” tab to access the system. The system will prompt you for information and will provide a time-sensitive code to complete your logon.

**Question:** Who do I contact if I have problems logging into FedHR Navigator?

**Answer:** Send an email to the AskHR helpdesk at: [USCG.AskHR@uscg.mil](mailto:USCG.AskHR@uscg.mil)

**Question:** Where can I locate the completed Position Description and OF-8 to upload with Classification/Recruitment Requests?

**Answer:** If the 1<sup>st</sup> line, 2<sup>nd</sup> line or Civilian Resource Coordinator do not have access to the signed OF-8 and PDs contact your servicing HR specialists for assistance.

Advisory Notice from Civilian HR (ANCHR) 17-11-S-2017 introduces the SharePoint site for Positions Descriptions containing generic and standard civilian position descriptions (PDs). Generic/standard ([Position Descriptions](https://cg.portal.uscg.mil/units/cg121/Position%20Descriptions/Forms/AllItems.aspx) <https://cg.portal.uscg.mil/units/cg121/Position%20Descriptions/Forms/AllItems.aspx>,

The SharePoint site contains over 60 generic PDs covering over 3,000 civilian positions across the U.S. Coast Guard and four standard PDs. Additional generic and standard PDs will be added to the SharePoint site as they are developed and classified. Organizations are encouraged to contact your servicing HR Specialist (field or HQ) to request assistance in developing additional generic or standard PDs.



**Question:** Can CRCs initiate HR Request in FedHR?

**Answer:** CRCs will have the ability to initiate inquiries and generate reports. CRCs will NOT have access to initiate Classification, Recruitment or Personnel Action Requests. If a CRC is also a certified supervisor of civilian employees then that CRC would select the supervisor role to initiate actions for positions and personnel that are located in the organization level they manage. The civilian hiring guide provides guidance for this policy ([http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/Civilian\\_Hiring\\_Guide.pdf?ver=2017-03-06-111659-403](http://www.dcms.uscg.mil/Portals/10/CG-1/cg121/docs/pdf/Civilian_Hiring_Guide.pdf?ver=2017-03-06-111659-403)).

**Question:** Why am I receiving so many e-mails

**Answer:** The policy for HR Specialists working on FedHR cases is to notify stakeholders are all steps of the process. If you would like to limit the number notification you receive please contact your servicing specialist to discuss.

**Question:** Do I need to submit more than one recruitment request if I am going to fill more than one position in multiple locations.

**Answer:** If you are recruiting multiple positions/multiple locations using the same PD, submit one recruitment request (title, series, grades, etc., are the same) and include ALL PCNs. If you are recruiting for more than one position with different position descriptions, you must submit a separate recruitment case for each PD.



## Appendix 5- Classification Request Detail/Steps

Detail/Step	Who Initiates Step	Additional information
New PD Requested	1 <sup>st</sup> Line Supervisor forward to 2 <sup>nd</sup> Line for concurrence and signature	
Resource Coordinator Review	2 <sup>nd</sup> Line Supervisor forwards to CRC	
Resource Coordinator to HR Specialist	CRC forwards to HR	
PD Review	HR if Package Complete	
Additional Documentation Needed	HR if Package Incomplete	
Management (Supv) Resubmit	Supv. Updates and returns To HR	
Management (Supv) Approval Needed	HR to Supv. for Review	
Management (Supv) Approval to HR Specialist	Supv Approves/Returns to HR	
PAL Approval Needed	HR	
PAL Update	HR or CRC	
PD Classified	HR	
HR Management Review	HR	
HR Management Review Completed	HR	
Tentatively Classified	HR	
Union Notification	HR	
Union Review Complete	HR	
Branch Chief Review	HR	
Branch Chief Approval	HR	
HR Director Review	HR	
HR Director Approval	HR	
Contractor Review Complete	HR	
Override Requested	HR	



## Appendix 6 - Recruitment Phases/Activity Step Definitions

Phase	Step Sequence	Step Name	Who Selects this Step to Reassign Case
Pre-recruit	Step 1	Request Created/ Vacancy Identified	1st Line Supervisor
	Step 2	Management Approval	2nd Line Supervisor to approve
	Step 3	Resource Coordinator Approval	1st line Supv. Reassigned to Civilian Resource Coordinator (CRC); CRC approves and reassigned to HR Specialist
	Step 4	Request Returned to HR	HR Specialist
	Step 5	Servicing Branch Chief Approval	HR Specialist – HR Branch Chief
	Step 6	Job Analysis Completed	Branch Chief - HR Specialist
	Step 7	Job Opportunity Announcement (JOA) Drafted	HR Specialist - Customer
	Step 8	JOA - Management Approval Requested	Customer - HR Specialist
Recruit	Step 9	JOA – Opened	HR Specialist
	Step 10	JOA - Closed	HR Specialist
	Step 11	Applications Reviewed	HR Specialist
	Step 12	Certificate(s) Created/Sent to Hiring Official	HR Specialist - Customer
	Step 13	Certificates(s) Sent to Hiring Official	HR Specialist
Selection	Step 14	Certificate(s) Returned from Hiring Official	Customer – HR Specialist
	Step 15	Tentative Selection/Offer	HR Specialist to Selectee (using On-boarding)
	Step 16	Personnel Security	HR Specialist (using eQIP)
	Step 16.1	Physical/Drug Testing	HR Specialist
	Step 17	Selectee Requesting Recruitment/Relocation	Selectee to HR Specialist (if applicable)
	Step 18	Recruitment/Relocation Sent to Hiring Official	HR Specialist to Customer (if applicable)
	Step 19	Recruitment/Relocation Returned by Hiring Official	Customer HR Specialist (if applicable)
	Step 20	Recruitment/Relocation Adjudicated by HR	HR Specialist to HR Branch Chief (if applicable)
On-boarding	Step 21	Entry on Duty Date Set	HR Specialist
	Step 22	Initiate On-boarding	documents to selectee
	Step 23		docs returned from selectee with digital signatures



## Appendix 7 – Personnel Action Request Detail/Steps Matrix

Personnel Actions	Activity	Detail/Step
	Process action in the Personnel/Payroll System	Review action and supporting documentation
		Need Information/Correction
		Compute New Rate of Pay
		Determine NOA, Authority, OPM Remarks,
		Process Action in the Personnel/Payroll System
	Request Appointment	
	Personnel Action Inquiry	

At the time of release of the supervisor guide, the Personnel Action activity and detail/steps are limited for the supervisor to “Process action in the Personnel/Payroll System” highlighted above. CG-121 personnel are in the process of working with the FedHR developers to provide additional selections based on the nature of action for the request.

The requested changes would include selections to include Awards, promotion, detail, reassignment, resignations, etc. The supervisor guide will be updated and notification will be forwarded to supervisors and CRCs when this upgrade is made available for use by USCG personnel.





## Appendix 8 – Pay and Leave Requests Activity Matrix

Pay and Leave	Activity	Detail/Step
	Change of Employee Address	Change of Employee Address
	Debt	Court Order Establish Bill Garnishment Deposit Waiver Request Place on Hold Other Debt
	Leave	Leave Inquiry Leave Audit
	LES	Submission of Prior LES LES Inquiry
	Pay Inquiry	Pay Inquiry COLA Incentives Correction Required
	Earning and Leave Questions	Respond to Earnings and Leave Questions
	Tax	Federal Tax State/Local Tax Correction required
	Union Dues	Union Dues Withhold Union Dues Cancel Union Dues Inquiry
	W-2	W-2 Inquiry
	WebTA	WebTA Password reset WebTA Supervisor account request WebA Inquiry Corrected timecard needed
	Comp Time Payment	Prepare Review Process
	Lump Sum Pay	Prepare Review Process
	Quick Service Request	Prepare Transfer to NFC Process
	Settlement	Prepare Review Process
	Salary (Faculty)	Prepare Review Process

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	VLTP	VLTP Application Review Application Decision VLTP Donations – Within Agency VLTP Donations – Not in Agency
	Disabled Vet Leave/Wounded Warrior FLA	Obtain VBA Documentation Adjudicate VBA Eligibility Process Personnel Action WebTA Team Action Notify Employee/TimeKeeper/Supv Other

At the time of release of the supervisor guide, the selections available for Pay and Leave activity and detail/steps would generally be initiated by employees or HR Specialists. CG-121 personnel are in the process of reviewing the supervisor role for these pay and leave activities, updates to the supervisor guide will be incorporated at a later date, as necessary.



## Appendix 9 - Editing and Digitally Signing the SF-52

Personnel Action Requests and Pay and Leave Requests will require editing on Block 1 to provide details of the personnel action requested.

Click on the appropriate **e-Sign** button(s) to digitally sign the SF-52 before routing/reassigning to the next person in the approval chain.

The screenshot displays the 'REQUEST FOR PERSONNEL ACTION' form (SF-52). Key areas are highlighted with red circles and yellow callouts:

- 1st Line Supervisor:** A yellow callout points to the 'e-Sign' button next to the 'Action Requested By' field.
- 2nd Line Supervisor:** A yellow callout points to the 'e-Sign' button next to the 'Action Authorized by' field.
- Civilian Resource Coordinator:** A yellow callout points to the 'e-Sign' button next to the 'Office Function' field in the 'PART C - Reviews and Approvals' section.

Other visible fields include 'Request Number', 'Proposed Effective Date', 'Name', 'Social Security Number', 'Date of Birth', 'Effective Date', and 'Supervisory Status'.

After clicking the **e-Sign** button, you will be asked to confirm your intent to sign. Click on the **Yes** button.

This screenshot shows the same SF-52 form with a confirmation dialog box overlaid. The dialog box asks: 'Do you want to e-Sign here?' with 'No' and 'Yes' buttons. The 'Yes' button is highlighted.

Enter your CAC/PIV PIN or FedHR Navigator password if you are not using the CAC/PIV then click on the **Submit** button.

This screenshot shows the SF-52 form with an 'e-Sign Confirmation' dialog box. The dialog box prompts the user to 'Please enter your password used to login to the FHR Navigator for security purposes.' and includes a password input field and a 'SUBMIT' button.

Click **Save** at the top right of the screen then select 'Previous Screen' to return to case information page.



## Appendix 10 Rules of Behavior

### FHR Navigator Rules of Behavior for Agency Application Users

- You must conduct only authorized business on the system.
- Your level of access to systems owned by Economic Systems Inc. is limited to ensure your access is no more than necessary to perform your legitimate tasks or assigned duties. If you believe you are being granted access that you should not have, you must immediately notify the Economic Systems Support Desk, support@econsys.com.
- You must maintain the confidentiality of your authentication credentials such as your password. Do not reveal your authentication credentials to anyone; an Economic Systems employee should never ask you to reveal them.
- You must follow proper logon/logoff procedures. You must manually logon to your session; do not store your password locally on your system or utilize any automated logon capabilities. You must promptly logoff when session access is no longer needed. If a logoff function is unavailable, you must close your browser.
- Never leave your computer unattended while logged into the system.
- You must report all security incidents or suspected incidents (e.g., lost passwords, improper or suspicious acts) to your agency's Information System Security Officer (ISSO).
- You must not establish any unauthorized interfaces between systems, networks, and applications owned by Economic Systems Inc.
- Your access to systems and networks owned by Economic Systems is governed by, and subject to, all Federal laws, including, but not limited to, the Privacy Act, 5 U.S.C. 552a, if the applicable Economic Systems' system maintains individual Privacy Act information. Your access to Economic Systems FHR Navigator constitutes your consent to the retrieval and disclosure of the information within the scope of your authorized access, subject to the Privacy Act, and applicable State and Federal laws.
- You must safeguard system resources against waste, loss, abuse, unauthorized use or disclosure, and misappropriation.
- You must not process U.S. classified national security information on the system.
- You must not browse, search or reveal information hosted by Economic Systems except in accordance with that which is required to perform your legitimate tasks or assigned duties.
- You must not retrieve information, or in any other way disclose information, for someone who does not have authority to access that information.
- You must ensure that Web browsers use Secure Socket Layer (SSL) version 3.0 (or higher) and Transport Layer Security (TLS) 1.0 (or higher). SSL and TLS must use a minimum of 256-bit, encryption.
- You must ensure that your web browser is configured to warn about invalid site certificates.
- You must ensure that web browsers warn if the user is changing between secure and non-secure mode.



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FHR Navigator Rules of Behavior for Agency Application Users (cont'd)

- You must ensure that your web browser checks for a publisher's certificate revocation.
- You must ensure that your web browser checks for server certificate revocation.
- You must ensure that web browser checks for signatures on downloaded files.
- By your signature or electronic acceptance (such as by clicking an acceptance button on the screen) you must agree to these rules.
- You understand that any person who obtains information from a computer connected to the Internet in violation of her employer's computer-use restrictions is in violation of the Computer Fraud and Abuse Act.
- You agree to contact your agency's Information System Security Officer (ISSO) if you do not understand any of these rules.

**ACCEPTANCE AND SIGNATURE**

I have read the above Rules of Behavior for External Users of Economic Systems FHR Navigator. By my electronic acceptance and/or signature below, I acknowledge and agree that my access to the Economic Systems FHR Navigator is covered by, and subject to, such Rules. Further, I acknowledge and accept that any violation by me of these Rules may subject me to civil and/or criminal actions and that Economic Systems retains the right, at its sole discretion, to terminate, cancel or suspend my access rights to the FHR Navigator system at any time, without notice.

User's Legal Name: \_\_\_\_\_ (printed)

User's Signature: \_\_\_\_\_ (signature)