



CPPA MNCC eCRM

User Guide v 3.0

Effective Date: June 23, 2023

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REFACTOR

The MNCC Refactoring of Personnel and Pay (PERSPAY) and the Human Resource Service Center (HRSC) into a single application (MNCC). The refactor has also resulted in:

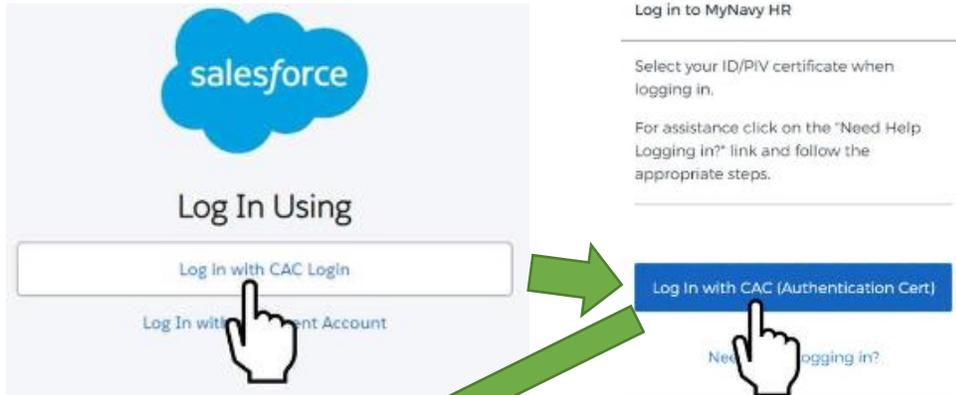
- Consolidated 445 queues down to 33.
- The approval process was removed.
- New process to submit a case to the queue using RT/PC/Routed to fields.
- The new Case tracker provides the functionality to move the case through the process.
- Status –
 - Some statuses have been removed.
 - The matrix for who can use what status has been updated.
- The case layout out has been updated with some fields being removed.
- Updating the Case Team to only include CPPAs.
- Removing Approval History from the case layout.

The “22 June 2023 Go Live” is the first of three refactor increments.

LOGGING ON TO MNCC eCRM

Navigate to <https://navynpc.my.salesforce.com/>

Preferred browsers are still Microsoft **Edge** and Google **Chrome** (Mozilla Firefox also works).

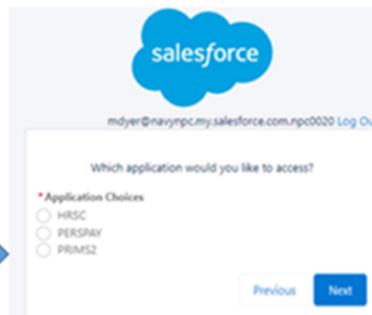


Enter your PIN if requested...click "OK".

Click the radio button if you agree. Click "Next".



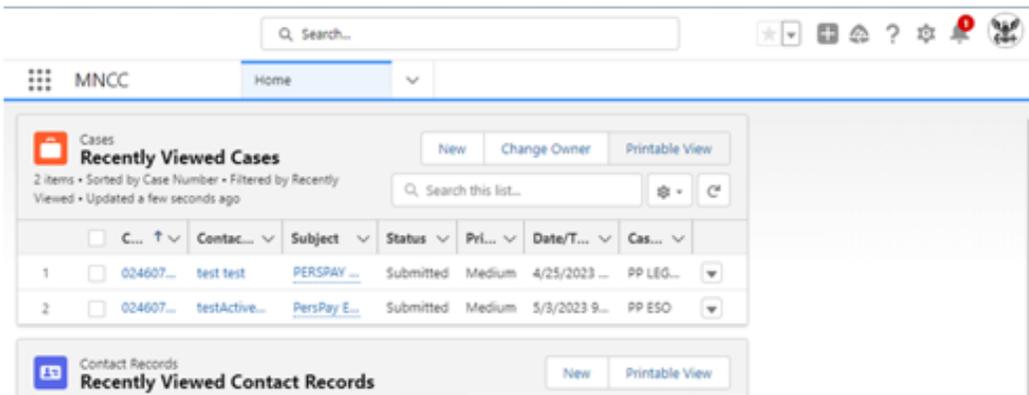
WAS



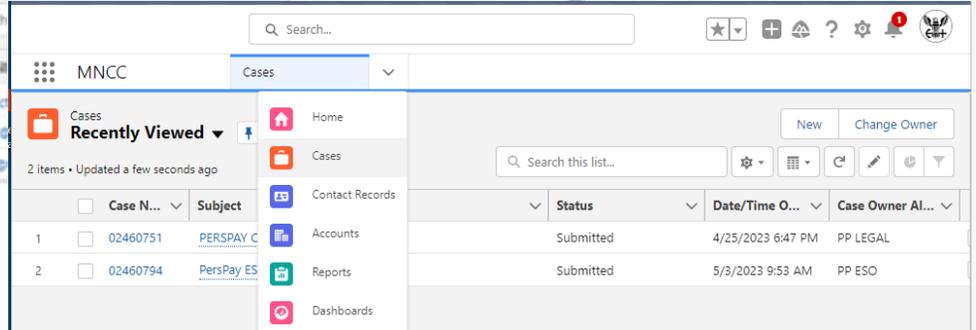
REFACTOR

Directly to the **Home Tab** unless you have both **MNCC & PRIMS2**.

NAVIGATING eCRM



You will log onto the same tab where you logged off.
To move between functional tabs use the drop down and select the desired tab.



Favorites – - Add contact records or cases to your favorites list.

Global Actions – - Quick access to start a New Contact, New Case, New Note.

Guidance Center – - If you were assigned learning it would be located here.

Salesforce Help & Training – - Another source for system help.

Setup – - (Reserved for Salesforce administrators)

Notifications – - Bell icon, for any cases you have submitted.

View Profile – - Your specific customizations. Use to get to Account Settings.



ACCOUNT SETTINGS

- Step 1: Click your “Avatar” in the upper right-hand corner
- Step 2: Click the word “Settings”
- Step 3: On the left-hand side of the screen, click “Advanced User Details”. If prompted to “view in classic mode” click the link to do so which will open up a new tab.
- Step 4: Review key items such as Queue Membership, Role, and Email to ensure you have the correct information listed. Remember to switch back to the Lightning Experience when done. If something appears wrong, you can edit certain parts of your account, but other parts will require a new SAAR or an administrator to fix.



CREATING A CASE

To create a case, add members, upload documents, and route to the appropriate processing center follow these steps.

On the “Cases” screen/tab, click the “New” button.

The screenshot shows the MNCC Cases interface. At the top, there is a search bar and navigation icons. Below that, the 'Cases' tab is selected. The main area displays a list of cases with columns for Case Number, Subject, Status, Date/Time, and Case Owner. A 'New' button is circled in red, indicating where to click to create a new case.

Case N...	Subject	Status	Date/Time O...	Case Owner AI...
1	02460751 PERSPAY Case RM	Submitted	4/25/2023 6:47 PM	PP LEGAL
2	02460764 PersPay ESC	Submitted	5/2/2023 9:52 AM	PP ESC

New Case: PersPay Case

Description * Required Information

Internal Comments

Case Status Comment

* Subject

* Description

Case Information

Case Number

Date Submitted

* Effective Date

Case Origin

Priority

Web Email

* Request Type

Problem Code

Routed To

* Status

* CPA LIC

* Contact Name

Case Owner

Related Users

Supervisor

CPA Alternate Email

Cancel Save & New Save

Fill in case details in the appropriate fields within the “Description”.

(Examples on next page)

Subject Line format: **LASTNAME FIRSTNAME**

Use the drop down menus to select required options. Depending on the choice in the “Request Type” options may be limited in the “Problem Code” or the “Routed To”; some may auto-populate.

Set “Status” to “Initiated”

Enter your UIC in the “CPPA UIC” field.

Locate and fill in the “Contact Name” for the Service Member requesting the case. You can search by SSN, DODID (preferred), or Name (not preferred). Again, this is the Member’s info NOT the CPPAs.

“Effective Date” click the Calendar icon and enter the effective date of pay. Identifies when this transaction took/takes effect. (i.e. – Separation – date must reflect date member starting PTDY/Terminal Leave)

The “Submitted Date” is auto-populated.

“Priority” default is “Medium”, follow appropriate guidance if considering a change.

Use the “Related Users” section to add additional CPPAs.

Once you have entered the required information click the “Save” button.



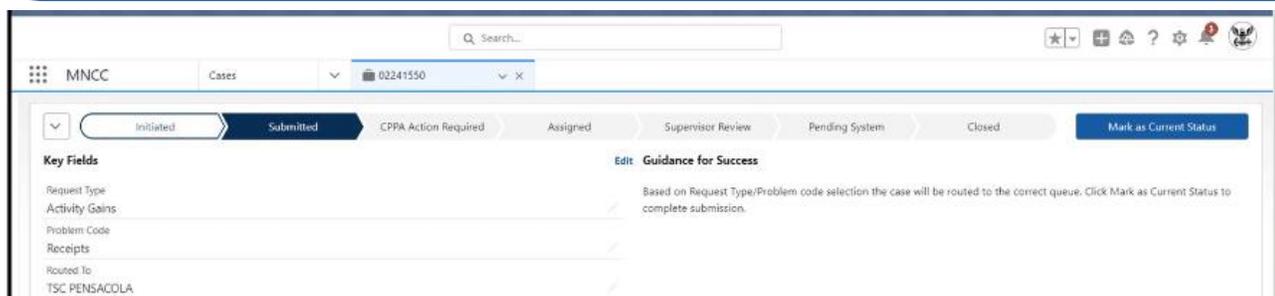
The case is now initiated. Before you submit the case to the TSC, attach the required supporting documents by clicking the “Upload Files” or dragging and dropping the files in the Files section.

Naming convention for docs: **LastFirst_DODID_Request_Type** (ex. LastFirst_1111111111_BAH)

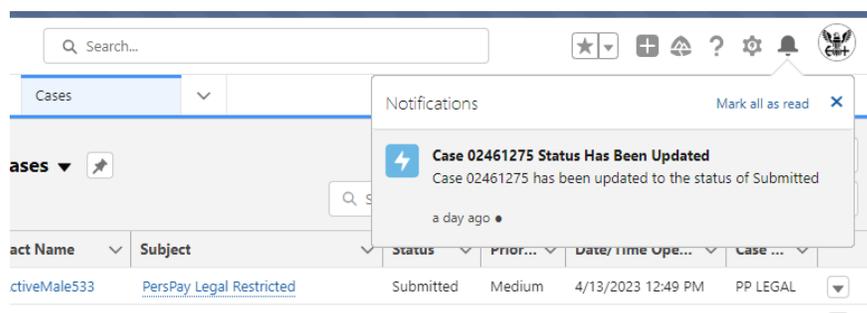
When file has completed uploading click “Done”.

SUBMITTING A CASE TO TSC

Verify all information is correct, click “Submitted” in the case tracker, then click “Mark as Current Status”; the case is submitted to the queue.



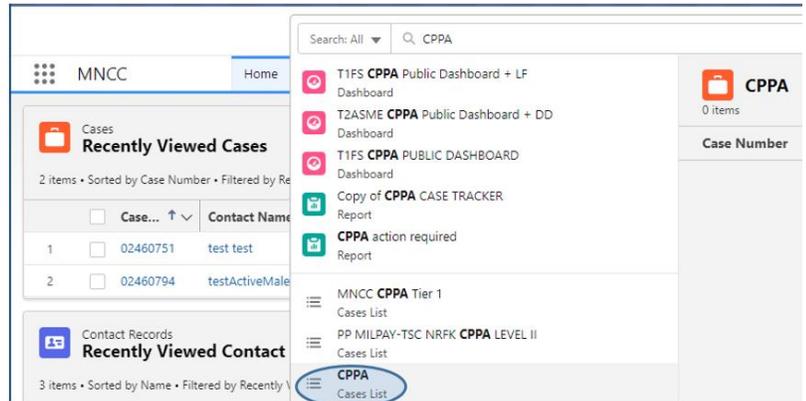
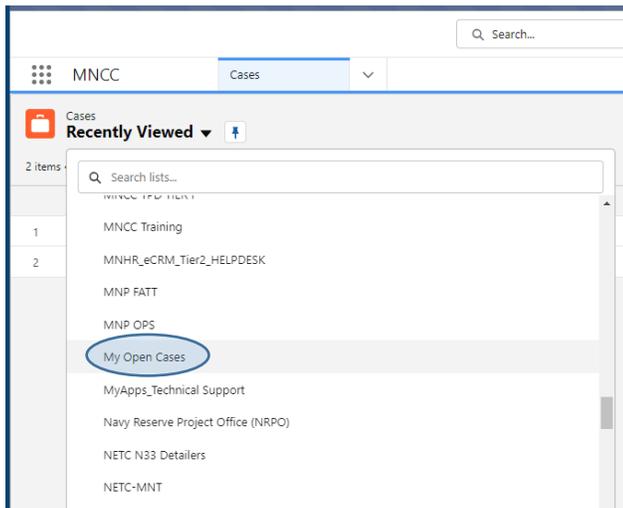
If the status changes or comments are made you will receive a “bell” notification in eCRM as well as an email.



TRACKING YOUR CASES

CPPAs are only able to see cases they have created **or** cases where they were added as a team member.

There are two preferred ways for CPPAs to find cases to which they are assigned:



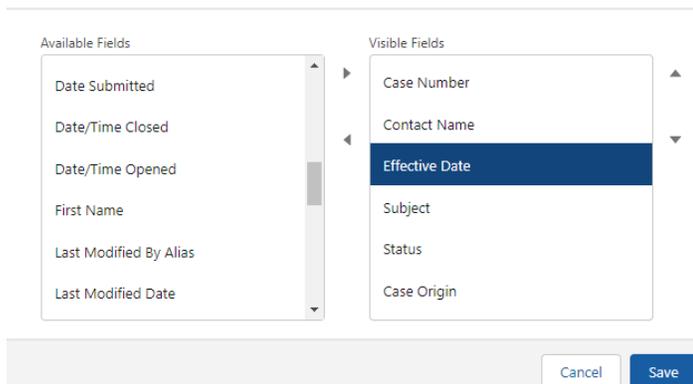
You can pin “📌” the list to keep it available and then select the case you want to process:

(If you know the Sailor’s name or case number, you can use the search field.)

CREATE A CUSTOM CASE LIST

1. On the “CASES” tab, click the “Gear” icon for the LIST VIEW CONTROLS.
2. Select “New” or “Clone”.
3. Give your list a name and select who can see your list.
4. Click the “Gear” icon for the LIST VIEW CONTROLS again.
5. Click “Select Fields to Display”. Highlight the field to be added (from left field) or removed (from the right field) use the middle triangles to make the move. Visible fields can be rearranged by highlighting then moving up/down using the triangles on the right. Click “Save”.

Select Fields to Display



6. Filters can be added. Click “Add Filter”. In the pop-up under “Field” select the column that is to be filtered, followed by the operator and the Value (may be more than one value). Click “Done”. May add multiple filters, once complete select “Save”. You may remove any filters later by clicking the “x” to the right of the particular filter.

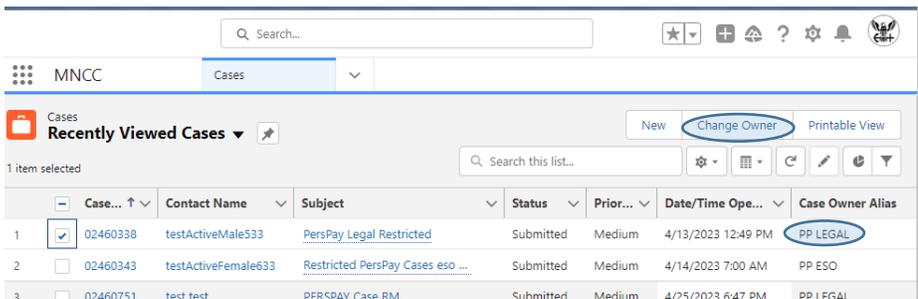
ADDING OTHER CPPAS TO A CASE

To add a Case Team Member use the “CPPA” field in the “Related Users” section on the Details tab for that particular case.

- Click on the pencil icon.
- Search for the CPPA in the box.
- Select the CPPA’s name to add.

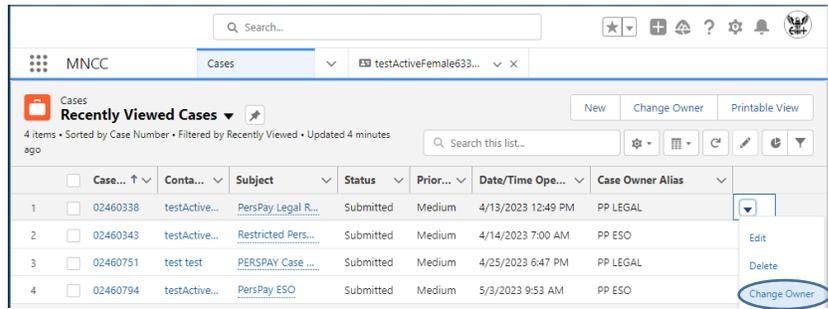
To delete a current Case Team Member, click the CASE TEAM MEMBERS, click the next button at the end...find the number of the CPPA you wish to remove, enter the number in the box at the bottom and click Next.

HOW TO CHANGE OWNERSHIP



If you are the Case Owner (currently PP LEGAL), you select the case by clicking inside the case’s box on the left (places the check mark) then select Change Owner.

Or,
You can click the down arrow box at the right side of the case line and select “Change Owner” (must still have been the current case owner).



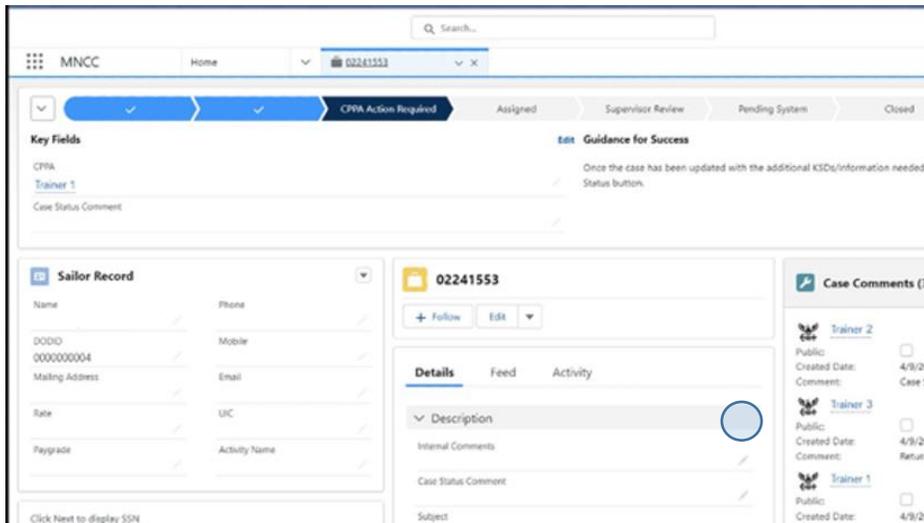
CPPA ACTION REQUIRED

Any case returned with a status of “CPPA Action Required” will generate a notification (bell icon). Click the bell icon and select the case to open.

Review all the case comments to be sure what is being requested. Provide additional/updated documents or required comments; review the Guidance for Success then add a comment in the “Case Status Comment” field. Clear comments save time. Click “Save”.

Click “Submitted” status, and then click “Mark as Current Status”. The case is now back in the queue.

HOW TO ADD INTERNAL COMMENTS



Open the case and select the “Details” tab and click on the “✎” pencil icon in the “Internal Comments” field and enter your comments and save.

DOCUMENTING CASE RESOLUTION

As a CPPA, it may be rare for you to close a case it, but if you do, adding a Case Resolution is mandatory in MNCC. This clearly states the end state of the ticket and can show why you made your decision. Even the most basic case may be reviewed at some time in the future to answer a question. A clear resolution comment is the key. Additionally, after a case is closed the Key Supporting Documents and comments are locked.

EMAIL AND eCRM

Always remember the email function within eCRM is **NOT** as secure as NMCI’s Outlook email (always encrypt emails containing PII). You may **NOT** send any PII through the eCRM email tool.

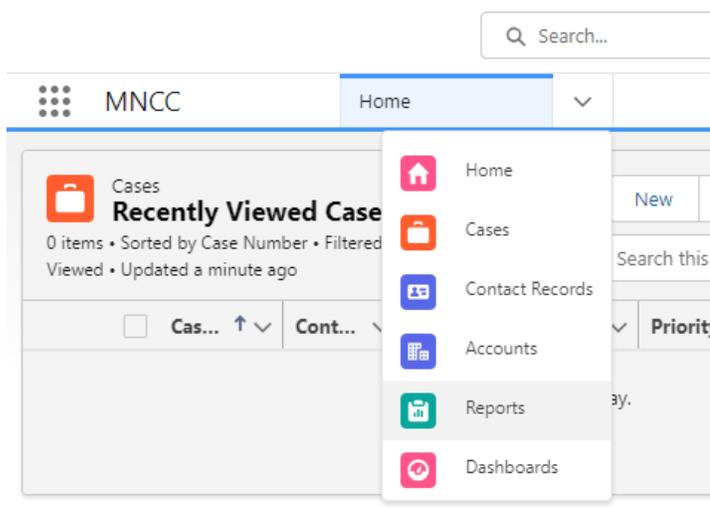
NOTE: Document any emails you send using Outlook within the case’s internal comments, (cut and paste).

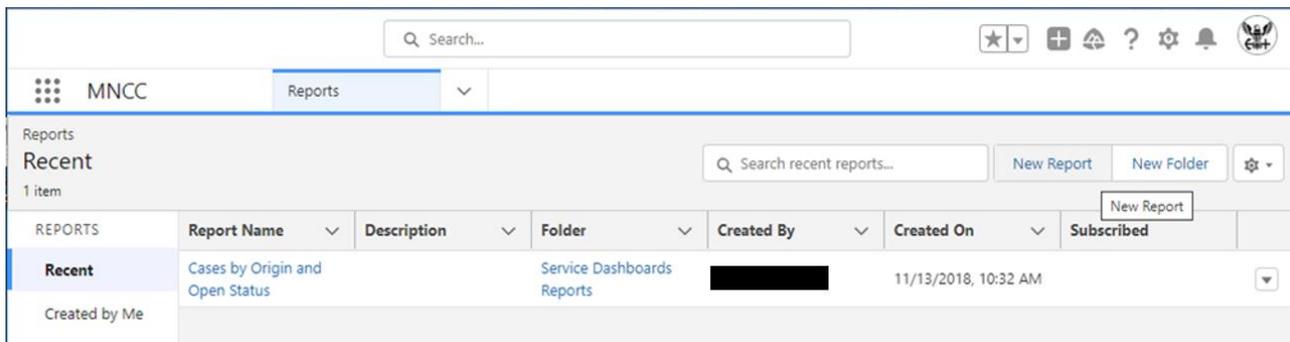
NOTE: If using eCRM email, MNCC will check that the email address is still valid before sending.

NOTE: If corresponding with someone who has MNCC eCRM access in another office about a case use the case number to minimize the amount of PII being sent

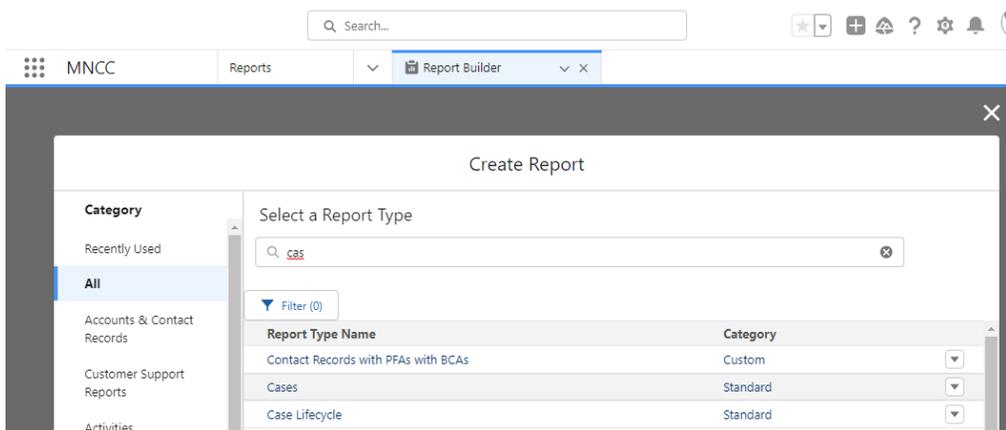
BUILD, VIEW, AND PRINT A REPORT

There are already over 120 reports and 40 report types.



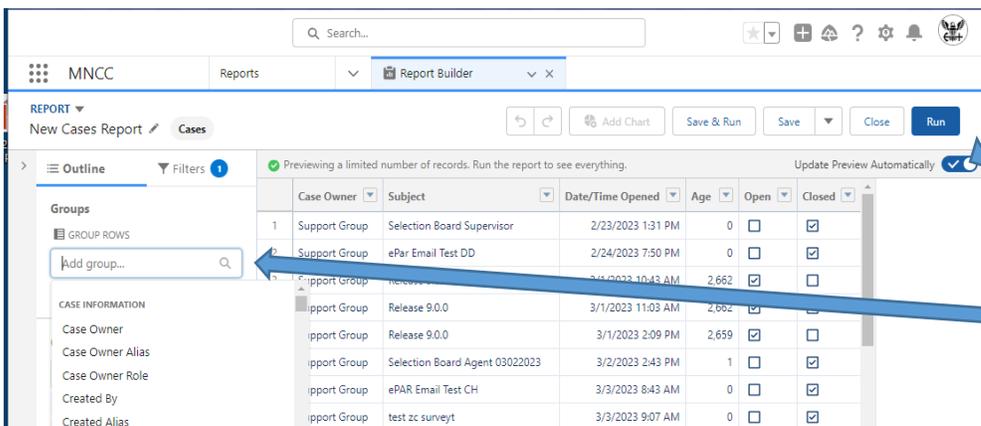
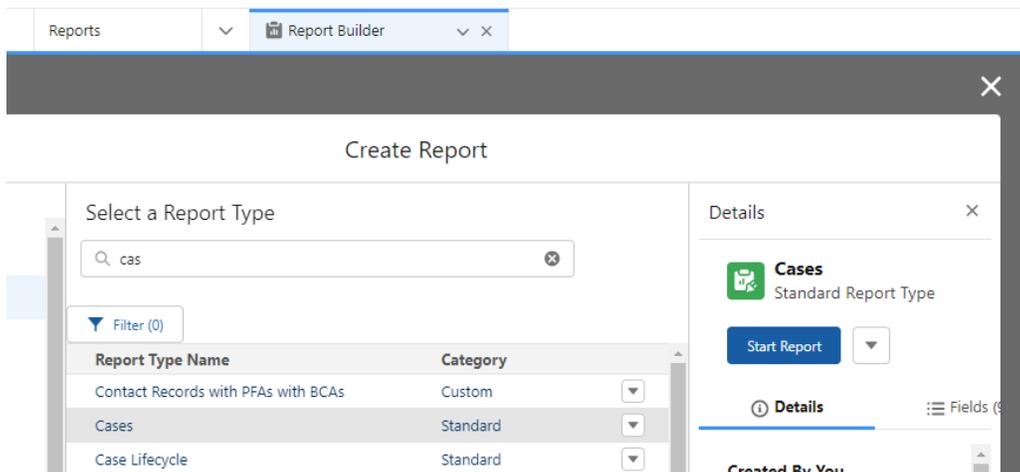


Click "New Report".



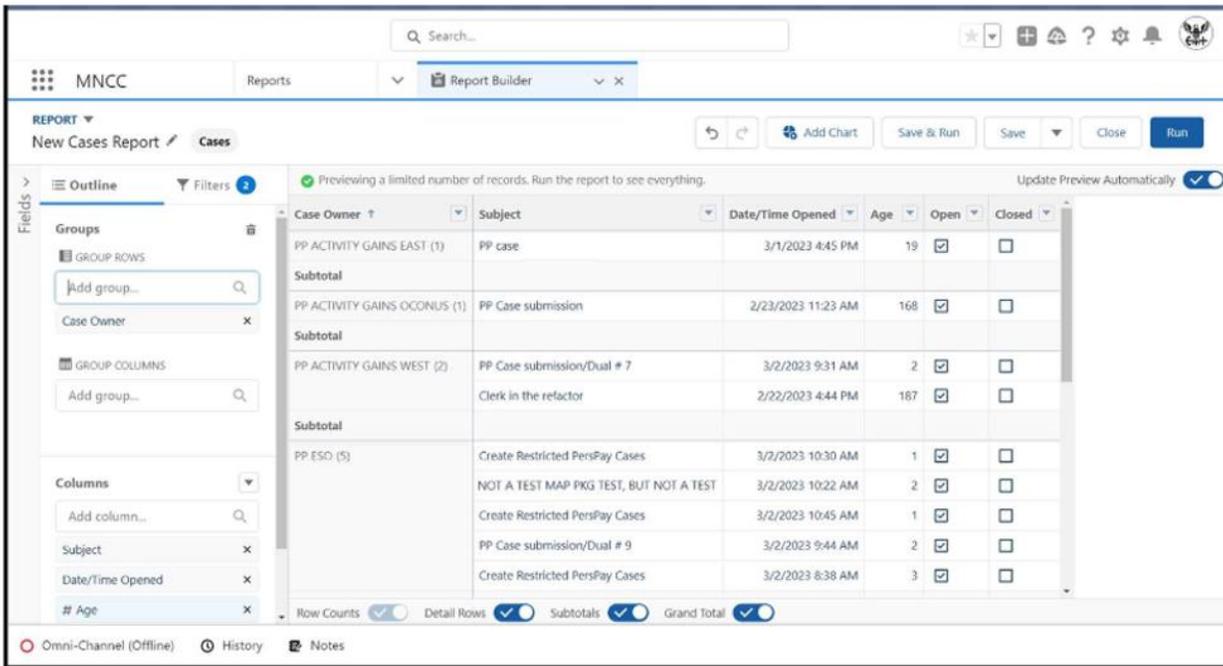
You can search through all available reports or search by report name.

Once you locate the needed report click the "Start Report" button.

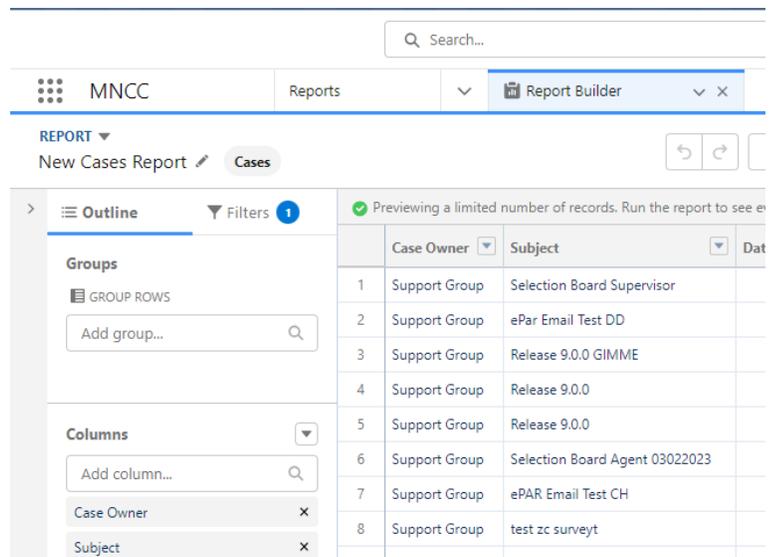


With "Update Preview Automatically" selected, the list will update in real-time.

You can group rows by case information. Select the "CASE INFORMATION" dropdown to set the criteria.



i.e. – Cases grouped by Case Owner.



You can add columns to your report by selecting “Add Column” under Columns section.

Available items can be added to your report.

Items already within your report can be removed by clicking the “x” after the item below the “Add Column...” box.

-Filters:

Adding Filters sets the report to display only the requested info.

Click **"Filters"**, Click **"Add Filter..."** select needed filters.

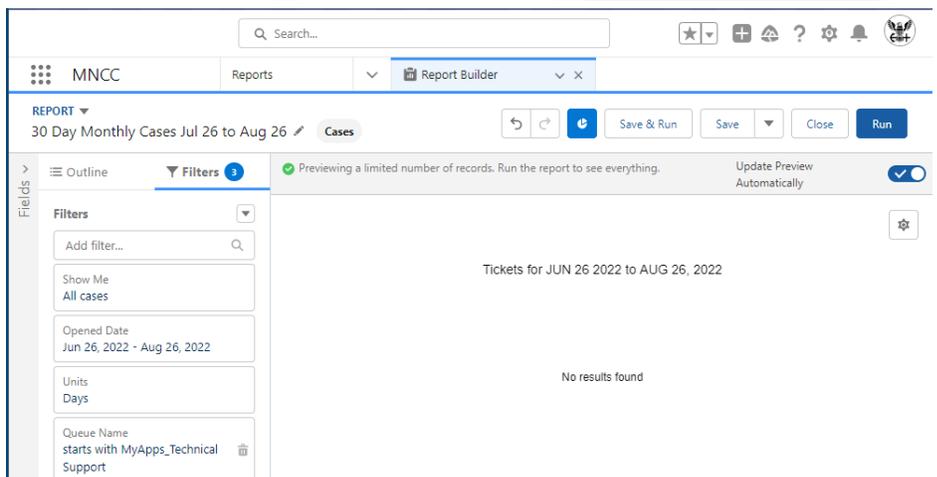
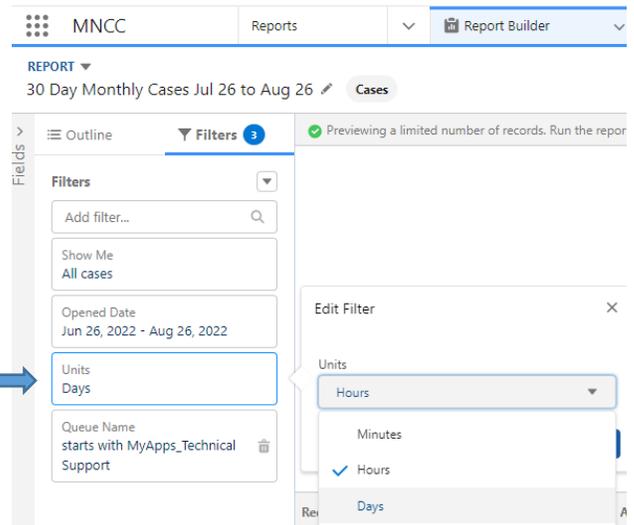
(Note: The default Units is in hours.)

Once parameters are set click the **"Run"** button in top right of the area.

Report should display.

To save the report, to be run later, click the drop down arrow (top right) next to **"Edit"**. Then click **"Save"**. Update report name, also advisable to add a thorough description, and where you want to look for it next time; can create your own folder (button bottom left of select area).

If you want to save a copy of the report click **"Export"** vice **"Save"**.



QUICK LINKS

MNCC Website

https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/

CPPA Resources

<https://www.mynavyhr.navy.mil/Support-Services/MyNavy-Career-Center/Pers-Pay-Support/CPPA-Resources/>

CPPA Pro-to-Pro Cell can be reached Mon-Fri from 0700-1900 Central Time by calling 1-833-330-6622 and pressing 2 when prompted.

eCRM **Refactor Training** for CPPAs:

<https://rise.articulate.com/share/3XU1GWwraDqJtsXnNUCRrjPreIJ6pLAO#/>