## PERS/PAY Workflow Quick Start Guide

## Training Quick Start Guide (QSG)

How to Manage a Case as a CPPA



The following steps will help you effectively initiate and manage your Salesforce cases as a CPPA.

Part 1: Create a New Case	Pers-Pay Service C Home 🗸
Once logged into Salesforce, select <b>Cases</b> from the home drop-down menu.	Cases Recently Viewed Cases 6+ Items • Sorted by Case Number • Filtered Cases
From the Cases page, select <b>New</b> from	Case N 1 V Contact Nam
the top right corner to create a case.	1 00200181 B Reports WB Submitted
	2 00200219 JOHNY JOE S cb Closed-Complete (Closed)
	3 00200245 Dashboards CPPA Action Required
Pers-Pay Service C Cases ~	4 00200413 JOHNY JOE S Approval Requests Assigned
Cases 2 New	5 00200458 JOHNY JOE S Submitted
Case Num         Subject         Date/Time Opened           1         00200761         TEST TEST         10/20/2020.1           2         00200760         GAIN, RPT 10/01/2020, PSSN BROCKMAN         10           3         00200758         GAIN, RPT 10/01/2020, PSSN BROCKMAN         10           4         00200757         GAIN, PSSN BROCKMAN, Pr         10	<ul> <li>of case you want to initiate and then select Next.</li> <li>The New Case page will appear. In this example, we will go through a <i>PersPay Case</i> type. Enter all</li> </ul>
<ul> <li>New Case</li> <li>PersPay Case This case type is used to process standard PersPay cases.</li> <li>PersPay ESO Restricted This case type is used to process cases that contain sensitive ESO information</li> <li>PersPay Legal Restricted This case type is used to process cases that contain sensitive legal information</li> <li>PersPay Medical Restricted</li> </ul>	<ul> <li>case details. The below items marked with a red asterisk are required in order to save.</li> <li>Subject</li> <li>Description</li> <li>Request Type</li> <li>Problem Code</li> <li>Status: Enter <i>Initiated</i></li> <li>Routed PSD</li> <li>Contact Name</li> </ul>
This case type is used to process cases that contain sensitive medical information <ul> <li>PersPay PayOps Restricted</li> <li>This case type is used to process cases that contain sensitive pay information</li> </ul>	5 To upload all relevant files, select <b>Upload File</b> under the Files section on the right-hand column.
Cancel Next 3	<i>Reminder:</i> Always review and confirm all required information is provided and signatures are in place prior to uploading files to the case.

Case PersPay Case Test - Training		+ Follow Edit •	Case Comments (0)		
Details Feed Activity			🕒 Files (0)		
Description     Case Information	4			Lupload Files Or drop files	
Case Number	Request Type				
00200765 Case Origin	Activity Gains Problem Code	/	📋 Case Team (1)		
Case Origin	Receipts	/	-		
Priority	Status		NAVY CPPAUser-4	•	
Medlum	Initiated	/	Memb CPPA		
Needed By			Case Read/Write Visible		
Section Category				View All	
Routed PSD					
AFLOAT EAST			Approval History (0)		•

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Submit for Approval

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How to Manage a Case as a CPPA

Please follow the steps below to ensure you can perform your role as a CPPA in Salesforce.

## Part 2: Submit Case for Approval

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Choose Next Approver

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Once all of the case information has been populated and all documents have been uploaded, you are now ready to submit the case to a TSC/PSD for processing. To do so, select Submit for Approval from the Edit drop-down menu on the upper right-hand corner.



Case PersPay Case Test - Training...

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Details

Activity

When you submit a case for approval, you will lock the case from any further edits. ALWAYS double check that you have all required information and paperwork included in your case before submitting and locking the case.

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