

MNCC RSC Muster Link



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https://usnavy.gov1.qualtrics.com/jfe/form/SV_oTgIQYZg67NX9pY



Personnel and Pay enterprise Customer Relationship Management (PERSPAY eCRM)

Presenter:
Date:

Objectives



- Properly access the PERSPAY eCRM.
- Utilize PERSPAY eCRM to
 - Create cases
 - Submit documentation
 - Update information to satisfy Sailors' requests

Introduction



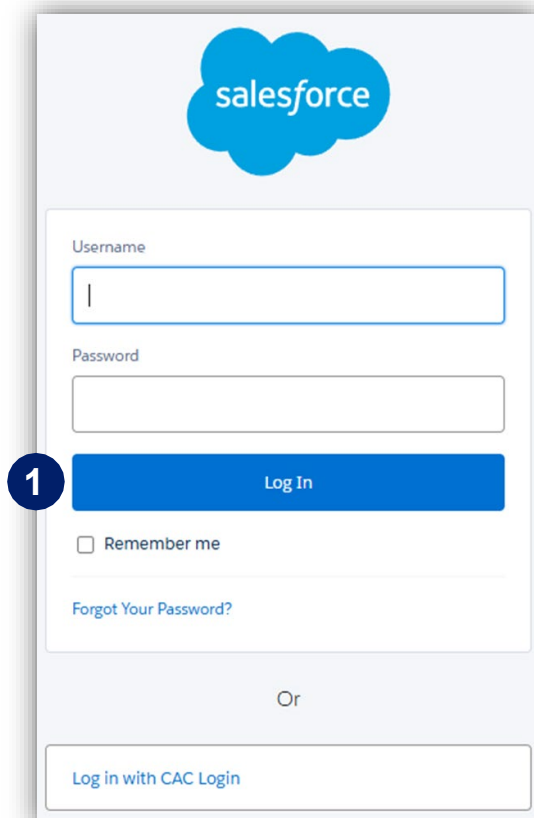
In this lesson we will cover:

- PERSPAY eCRM Logon
- Basic familiarization
- Creating a case
- Uploading & viewing documents, comments, and history
- Personally Identifiable Information (PII)
- FAQs

Log In

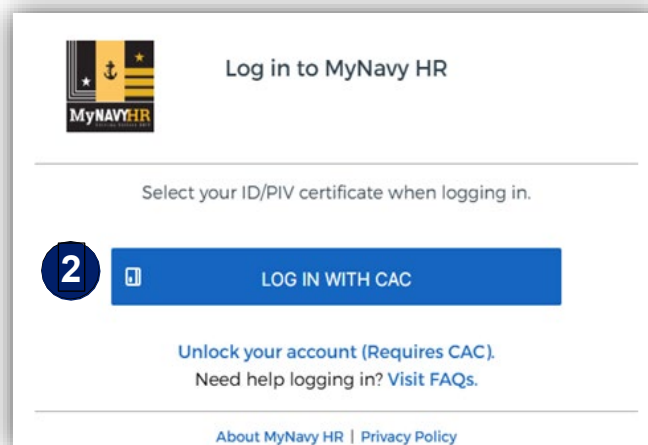


Access eCRM using: <https://navynpc.my.salesforce.mil>

The image shows the Salesforce login page. At the top is the Salesforce logo. Below it are two input fields: "Username" and "Password". A blue "Log In" button is positioned below the password field. Below the button is a "Remember me" checkbox and a "Forgot Your Password?" link. At the bottom, there is an "Or" separator and a "Log in with CAC Login" button.

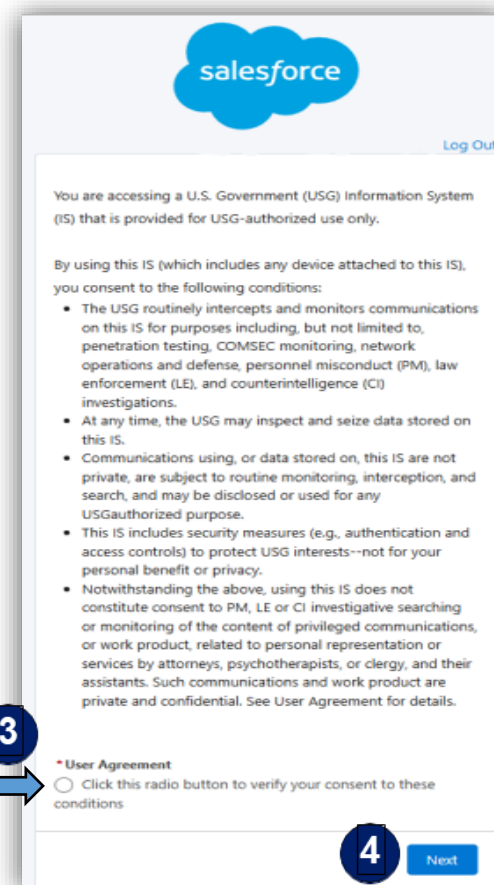
1

Click CAC Login

The image shows the MyNavy HR login page. It has the MyNavy HR logo at the top left. The main heading is "Log in to MyNavy HR". Below this is a instruction: "Select your ID/PIV certificate when logging in." A blue button with a radio button icon and the text "LOG IN WITH CAC" is highlighted with a blue circle and the number "2". Below the button, there is a link to "Unlock your account (Requires CAC)." and another link for "Need help logging in? Visit FAQs." At the bottom, there are links for "About MyNavy HR" and "Privacy Policy".

2

Click Radio Button

The image shows the Salesforce user agreement page. It has the Salesforce logo at the top. Below the logo is a "Log Out" link. The main text states: "You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only." This is followed by a paragraph about consent and a list of conditions. At the bottom, there is a "User Agreement" section with a radio button and the text "Click this radio button to verify your consent to these conditions". A blue circle with the number "3" and an arrow points to this radio button. At the bottom right, there is a blue "Next" button highlighted with a blue circle and the number "4".

3

4

Click Next

Navigating PERSPAY eCRM



1 Navigation Tab

2 Search

3 ? - Help Function

4 - Notifications

5 - Avatar: User customizations

Home

Cases

Contact Records

Accounts

Reports

Dashboards

Knowledge

NAVY PSDUser-14
navynpc--test.my.s...ce.com

A Log Out

B Settings: Personalize

C Display Density: How much info is shown

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

Switch to Salesforce Classic ⓘ

Add Username

A Log Out

B Settings: Personalize

C Display Density: How much info is shown

Home Menu



AMERICA'S NAVY

MNCC Home

00200762 Case 1

Recently Viewed Cases

6+ items • Sorted by Status • Filtered by Recently Viewed • Updated an hour ago

New Change Owner Printable View

Search this list...

<input type="checkbox"/>	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
1	<input type="checkbox"/> 00200762	John Doe	Test test	Medium	2/3/2025 4:45 PM		

Recently Viewed Contact Records

6+ items • Sorted by Name • Filtered by Recently Viewed • Updated an hour ago

New Printable View

Search this list...

Name	Account Name	Phone	Email	Contact Owner Alias
------	--------------	-------	-------	---------------------

Links To Training

[CPPA Resource](#)

① *Case Tabs:* Your open cases appear as tabs

② *Recently Viewed Cases*

③ *Recently Viewed Contacts*

④ *Link to CPPA Resources in MyNavyHR*

Sorting Information



The screenshot shows the Mynavy HR system interface. At the top, there is a search bar and navigation icons. Below the search bar, the "MNCC" logo is visible. The main content area is titled "Cases" and "Recently Viewed Cases". It shows a list of 6+ items, sorted by Case Number, filtered by Recently Viewed, and updated 4 minutes ago. The table has columns for Case Number, Contact Name, Subject, Status, Priority, and Date/T... . Three callouts are present: 1 points to the sorting arrow in the Case Number column header, 2 points to the drop-down arrows in the Subject and Status column headers, and 3 points to the refresh icon in the top right corner of the table.

Case Number	Contact Name	Subject	Status	Pri...	Date/T...	C
1	WILLIAM SHANE PI...	N000221...	New	Medium	9/22/2020 ...	M
2	JOSHUA LEAKE	AN LEAK...	Closed	Medium	12/10/202...	M

- 1 **Sorting Arrow:** Change sorting for the list
- 2 **Drop-down:** Change the view of content
- 3 **Refresh:** Refreshes selected list

Creating a case



AMERICA'S NAVY

Search...

MNCC Home Case

Cases **Recently Viewed Cases**

6+ items • Sorted by Status • Filtered by Recently Viewed • Updated an hour ago

New Change Owner Printable View

Search this list...

	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
1	05318212	John Doe	Test	Assigned	Medium	2/3/2025 4:45 PM	pfigu

- 1 Select “Cases” from the Navigation Tab
- 2 Select ”New”

Creating a case (cont.)



The screenshot shows the Mynavy Career Center (MNCC) interface. At the top, there is a search bar and a navigation bar with the MNCC logo, a "Cases" dropdown menu, and a "New Case" button. The "New Case" button is highlighted, and a modal window titled "New Case" is open. This modal contains four radio button options for selecting the type of case. The first option, "PersPay Case", is selected. Each option includes a brief description of its use.

New Case

- ☒ PersPay Case
This case type is used to process standard PersPay cases.
- ☐ PersPay ESO Restricted
This case type is used to process cases that contain sensitive ESO information
- ☐ PersPay Legal Restricted
This case type is used to process cases that contain sensitive legal information
- ☐ PersPay Medical Restricted
This case type is used to process cases that contain sensitive medical information

- 1 Select “Type of Case”
- 2 Select “Next”

Creating a case (cont.)



* Subject

* Description

Case Information

Case Number

* Request Type
--None--
View all dependencies

Date Submitted

Problem Code
--None--
View all dependencies

* Effective Date

Routed To
--None--
View all dependencies

Case Origin
--None--

* Status
Initiated
View all dependencies

Priority
Medium

Sub-Status
--None--
View all dependencies

CPPA compiles, verifies, and submits the package to servicing TSC via PERSPAY eCRM.

See eCRM Library in CPPA Resources for Routing Guidance

If you do not put it in submitted it will not be routed.

- 3 Make entries for: **Subject, Description, Request Type, Effective Date, and Status**

NOTE: *Don't include PII in the **Subject** or **Description***

Creating a case (cont.)



* Subject

* Description

Case Information

Case Number

* Request Type

--None--

Date Submitted

Problem Code

--None--

* Effective Date

Routed To

--None--

Case Origin

--None--

* Status

Initiated

Priority

Medium

Sub-Status

--None--

CPPA compiles, verifies, and submits the package to servicing TSC via PERSPAY eCRM.

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NOTE: *Don't include PII in the **Subject** or **Description***

Creating a case (cont.)



Needed By

Web Email

Mass Upload ID

RED/DA validated ☐

Sailor DODID/SSN

Trouble Ticket #

Trouble Ticket Date ⓘ
Date Time

* CPPA UIC

* Contact Name ⓘ

Disposition
--None--

[View all dependencies](#)

No Sailor DODID/SSN ☐

- 4 Make entries for: **CPPA UIC, Contact Name (Sailor's name, not CPPA), and Sailor's DODID/SSN**
- 5 Verify all information is correct. Click "Save"

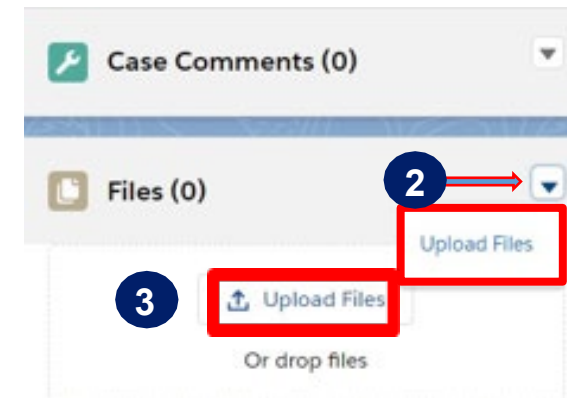
Uploading Documents



The screenshot shows the Mynavy HR system interface. At the top, there's a navigation bar with "Pers-Pay Service C..." and "Home". Below that, a "Cases" section is visible with a "Recently Viewed" filter. A table lists 30 items, sorted by Case Number. The first item, with Case Number 00200102, is highlighted with a red box and a blue circle with the number 1. The table has columns for Case Number, Subject, Status, Date/Time Opened, and Case Owner Alias.

	Case Number ↑	Subject ↑	Status	Date/Time Opened	Case Owner Alias
1	00200102	smoketest1	Submitted	10/7/2020 12:53 PM	cpha-16
2	00200110	AN test Approval Process	Closed-Complete (Closed)	10/7/2020 3:21 PM	cpha-20

- 1 Select the case to attach documents
- 2 Click arrow -- select **Upload Files**
- 3 Upload Files or Drag and Drop



Note: All Pay, Personnel, and Travel cases impacting pay NOT certified by the CO, must include an approved DD Form 577 for the “certifying officer”.

Viewing Documents



The screenshot shows the Mynavy HR system interface. At the top, there is a search bar and a navigation menu with "Home" and "00200762". Below the navigation bar, the "Cases" section is visible, showing a list of "Recently Viewed" cases. The list has columns for "Case Number", "Subject", and "Status". The first case is "00200102" with subject "smoketest1" and status "Submitted". The second case is "00200110" with subject "AN test Approval Process" and status "Closed-C".

On the right side of the interface, there is a sidebar with sections for "Case Comments (0)", "Files (1)", and "Case Team (1)". The "Files (1)" section shows a file named "Test test best" with a date of "Oct 18, 2020" and a size of "12KB". A red box highlights this file. Below the file list, there is a "View All" link.

At the bottom right, there is a preview window for the selected file. It shows the file name "Test test best" and a "Download" button. A red box highlights the "Download" button.

- 1 Select the case to view
- 2 On the right click on the File to be downloaded
- 3 Click *Download* and select *Save As* or *Open*

Internal Comments



- 1 Find the **Details** tab
- 2 Select the **Internal Comments** pencil

This screenshot shows the "Case TEST TEST" details page. The "Details" tab is selected and highlighted with a red box and a blue circle with the number "1". Below the tabs, the "Description" section is expanded. Within this section, the "Internal Comments" field is highlighted with a red box and a blue circle with the number "2". A small pencil icon is visible next to the "Internal Comments" label, indicating it can be edited. Other fields like "Case Status Comment", "Subject", and "Case Information" are also visible.This screenshot shows the "Case TEST TEST" details page, similar to the previous one, but with the "Internal Comments" field expanded. The field contains the text: "Internal comments are NOT visible to the customer. All comments must be clear and professional." The field is highlighted with a red box and a blue circle with the number "3". A pencil icon is visible next to the text, indicating it can be edited. The "Case Information" section is also visible below.

- 3 Add comments then click **Save**

Feed

A screenshot of the MyNAVYHR interface showing the "Feed" tab. At the top, there are three tabs: "Details", "Feed" (which is selected and underlined), and "Activity". Below these tabs is a horizontal menu with five options: "Post", "New Task", "Log a Call", "New Event", and "Email". The "Email" option is highlighted with a blue circle and the number "2". Below the menu is a text input field with the placeholder text "Share an update..." and a blue "Share" button. The input field is highlighted with a blue circle and the number "1". Below the input field, there is a section titled "Most Recent Activity" with a dropdown arrow. It shows a list of activities, including one from a user profile with a blue square icon, labeled "To: Internal" and "Please attach KSD.". Below this activity is a "Comment" button. To the right of the activity list, there is a search bar with the placeholder text "feed..." and a magnifying glass icon. Below the search bar is a "Just now" dropdown menu.

- 1 Select the “**Feed**” tab, this is where most of the “conversation” or “feedback” will be located in regard to the case.
- 2 The email option will allow an email to be sent to the TSC, CPPA, or Member for notifications outside of Salesforce. Most emails will come in the form of a MNCC email.

View Case History



The screenshot shows the "My Cases" interface. At the top, it says "Cases My Cases" with a filter icon. Below that, it says "50+ Items • Sorted by Date/Time Opened • Filtered by My cases • Updated a few seconds ago". There is a table with columns: Case Number, Contact Name, Subject, and Status. The first row is highlighted with a red box and a blue circle with the number 1. The second row is also highlighted with a red box. The third row is not highlighted. Below the table, there is a detailed view of a case titled "Case test". It has tabs for "Details", "Feed", and "Activity". The "Activity" tab is selected and highlighted with a red box and a blue circle with the number 2. Below the tabs, there is a section titled "Case History (1)" with a table showing the history of the case. The table has columns: Date, Field, User, Original Value, and New Value. The first row shows a date of "10/18/2020 5:29 ...", a field of "Created", and a user of "NAVY CPPAUser-1". There is a "View All" link below the table. A red box and a blue circle with the number 3 highlight the "Case History (1)" section.

Case Number	Contact Name	Subject	Status
00200755	JEDY NAVAL SMITH	test	Initiated
00200754	JEDY NAVAL SMITH	1871 Test Stand	
00200692	ED Corporate Role Test	test	

Date	Field	User	Original Value	New Value
10/18/2020 5:29 ...	Created	NAVY CPPAUser-1		

- 1 Select the case to be viewed
- 2 Select the **Activity** tab
- 3 The Case History box will appear

Why should the Case History be reviewed before starting to work on a case?

CPPA PERSPAY eCRM Command Dashboard



The "CPPA Command" Dashboard is available in PERSPAY eCRM as of 1 Nov 22.

CPPAs are encouraged to familiarize themselves with dashboard functionality to support command leadership in providing case information and additional case reports, as needed.

The instruction guide identifies essential information to help CPPAs understand access to the elements of the dashboard and system access requirements.

CPPA PERSPAY eCRM Command Dashboard guide can be found on the CPPA resources page.

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

Standard Operating Procedure



Start

Service member requires a pay or personnel case.

Step 1

CPPA verifies, gathers docs, and uploads to PERSPAY eCRM.

Step 2

Supervisor assigns case to Clerk.

Step 3

Assigned Clerk processes the case.

Step 4

Assigned PS marks case complete.

End

Customer verifies case is complete.

Step 6

CPPA informs customer the case is complete.

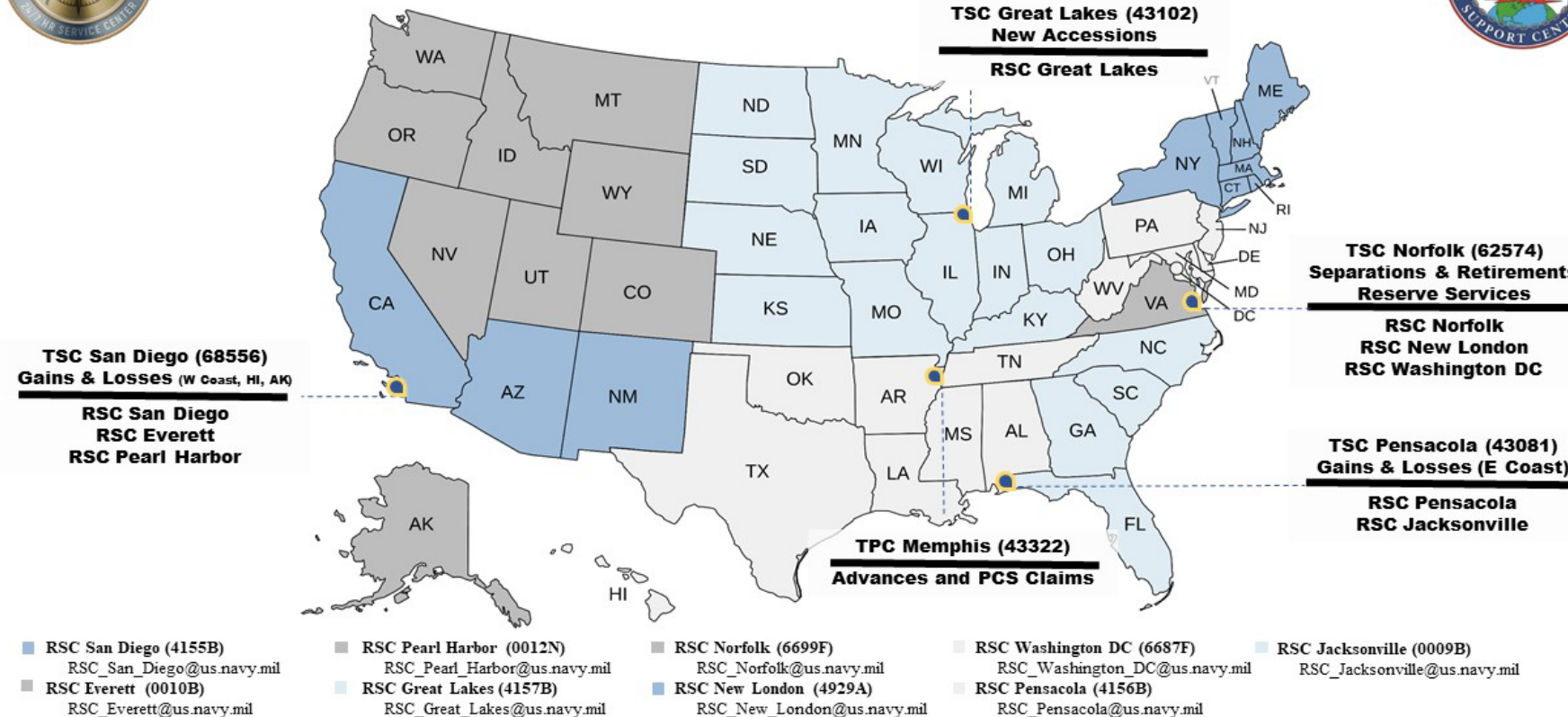
Step 5

CPPA receives an e-mail that case is complete.

Transaction Service Center and Regional Support Center Locations



Transaction Service Centers & Regional Support Centers (CONUS)

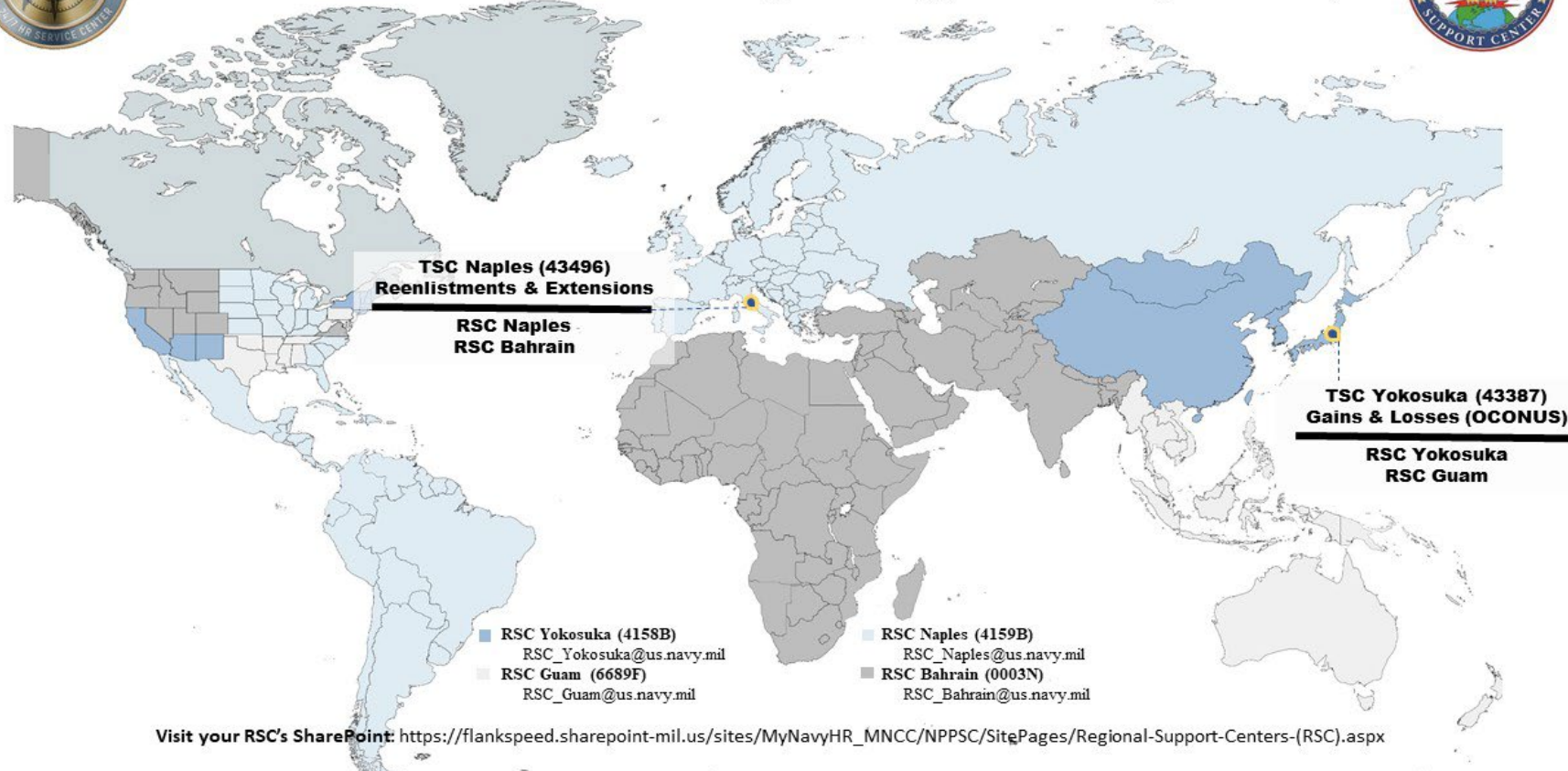


Visit your RSC's SharePoint: [https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/NPPSC/SitePages/Regional-Support-Centers-\(RSC\).aspx](https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/NPPSC/SitePages/Regional-Support-Centers-(RSC).aspx)

Transaction Service Center and Regional Support Center Locations OCONUS



Transaction Service Centers & Regional Support Centers (OCONUS)



Visit your RSC's SharePoint: [https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/NPPSC/SitePages/Regional-Support-Centers-\(RSC\).aspx](https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/NPPSC/SitePages/Regional-Support-Centers-(RSC).aspx)

PII on PERSPAY eCRM



- eCRM can store and transfer PII but its email tool is **NOT** cleared to send PII material
 - **NEVER** put PII into the case 'Subject', 'Description', or any field automatically included in eCRM emails
 - Use NMCI Outlook if sending emails containing PII to Sailors or DoD
- *Ensure emails are encrypted
- Make an 'Internal Comment' in eCRM about any customer emails sent using Outlook

Resources



- CPPA Resources Web Page

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

- MNCC PERSPAY eCRM SharePoint site

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

- Functional mailbox for account issues:
askmncc.fct@navy.mil

FAQs



1. Can cases be edited or modified once submitted in PERSPAY eCRM?

Yes, cases can be edited after creation. Any PERSPAY eCRM user, assigned to the case, can edit the case.

Cases can not be deleted once created. If information is incorrect or missing the TSC can return it to the CPPA to be corrected.

FAQs



2. Do email notifications reference the Sailor's name and case ID number?

Yes, if the case contains the Sailor's and CPPA's contact information. The CPPA and Sailor will receive automated email notifications. These notifications will reference the Sailor's name, case ID, subject, and description.

NOTE: Do **NOT** include PII in a case's subject or description field since the automatic email function employed by eCRM is not accredited to protect PII.

FAQs



3. Can cases be created without internet connectivity?

No, internet connectivity is required to access PERSPAY eCRM. Sailors in a disconnected environment will need to work through their supporting shore activity.

FAQs



4. Where can I find more information on creating cases in PERSPAY eCRM?

Quick Start Guides (QSGs) on how to create, update, resolve cases can be found on the CPPA Resources page.

FAQs



5. What are some common issues with PERSPAY eCRM accounts?

1. SAARs – attention to detail. Instructions are long but the process isn't fast and having a SAAR returned will only delay the process.
2. Loss of access:
 1. When the account is created users have a very limited time to access their account.
 2. Users who don't use their account for 30 days will lose their access.
 3. Waiting for an account to be reestablished can cause unnecessary delays.

FAQs



6. Why check PERSPAY eCRM on a daily basis?

If the TSC needs more information and the system isn't checked the Sailor's case is being delayed.



Questions?

Summary and Review



In this lesson we covered:

- PERSPAY eCRM Logon
- Basic familiarization
- Creating a case
- Uploading & viewing documents, comments, and history
- Personally Identifiable Information (PII)
- FAQs

Conclusion



You have reached the end of the PERSPAY eCRM training.

Thank you for your participation!

THE SAILOR WINS TODAY

MNCC RSC Muster Link



Scan QR Code to record your attendance
at any RSC PERSPAY Training!

https://usnavy.gov1.qualtrics.com/jfe/form/SV_oTgIQYZg67NX9pY