

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



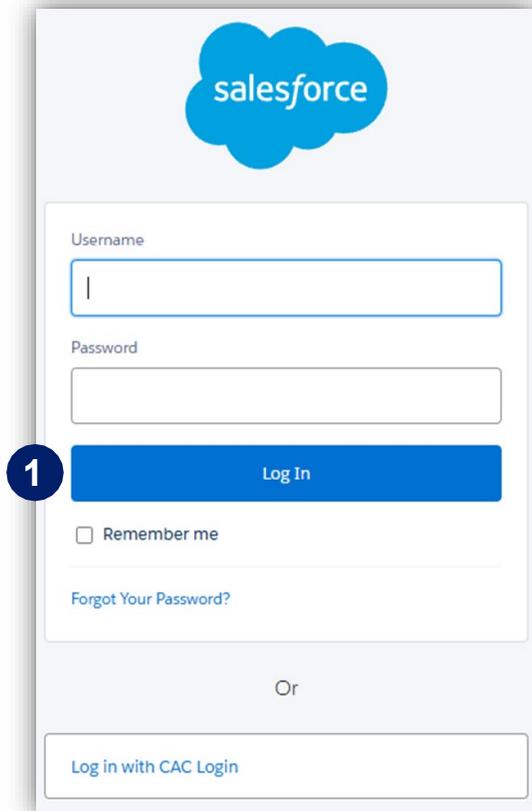
In this lesson we will cover:

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

Log In

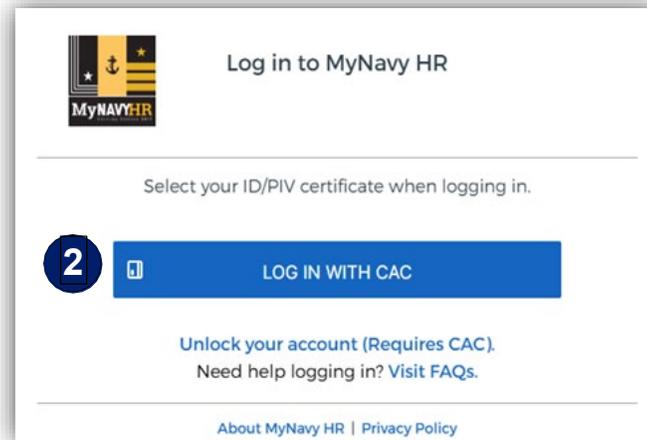


Access eCRM using: <https://navynpc.my.salesforce.mil>



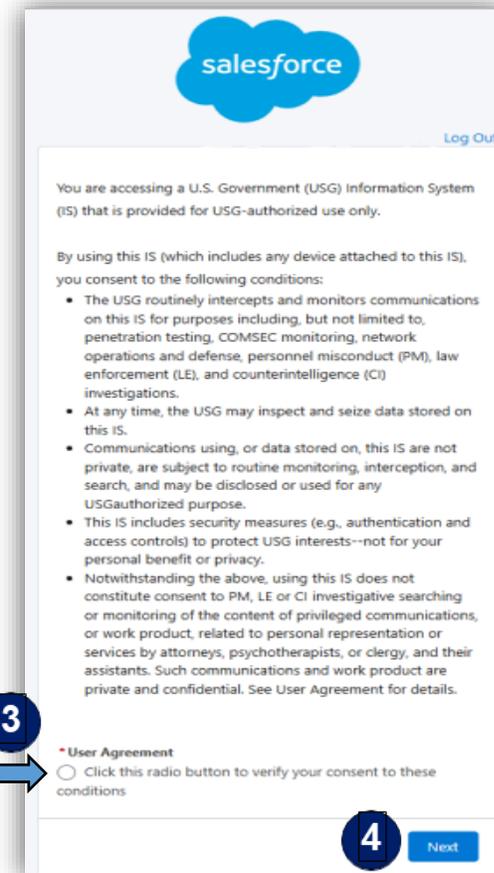
The first screenshot shows the Salesforce login page. At the top is the Salesforce logo. Below it are two input fields: "Username" and "Password". A blue "Log In" button is highlighted with a circled "1". Below the button is a "Remember me" checkbox and a "Forgot Your Password?" link. At the bottom, there is an "Or" separator and a "Log in with CAC Login" button.

Click CAC Login



The second screenshot shows the MyNavy HR login page. It features the MyNavy HR logo and the text "Log in to MyNavy HR". Below this is a heading "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 circled "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".

Click Radio Button



The third screenshot shows the Salesforce user agreement page. It features the Salesforce logo and a "Log Out" link. The main content is a user agreement with several bullet points. A radio button next to the heading "User Agreement" is highlighted with a circled "3". At the bottom right, a blue "Next" button is highlighted with a circled "4".

Click Next



Navigating PERSPAY eCRM



A screenshot of the PERSPAY eCRM interface. At the top left is the "NAVY" logo and "MNCC" text. Below it is a "Home" navigation tab. To the right is a search bar labeled "Q Search...". Further right are icons for help (a question mark), notifications (a bell), and an avatar. A red box highlights the "Home" tab (1), the search bar (2), the help icon (3), the notification icon (4), and the avatar (5). A callout box for the avatar (5) shows a user profile for "NAVY PSDUser-14" with "Settings" (B) and "Log Out" (A) buttons. A red box highlights the "Settings" button (B) and the "Display Density" section (C), which includes "Comfy" (checked) and "Compact" options.

1 Navigation Tab

2 Search

3 ? - Help Function

4 - Notifications

5 - Avatar: User customizations

A Log Out

B Settings: Personalize

C Display Density: How much info is shown

Home Menu



The screenshot shows the MyNavyHR Home Menu interface. At the top left is the "AMERICA'S NAVY" logo. Below it is the "MNCC" logo and a "Home" tab. A search bar is located at the top right. A red box labeled "1" highlights a case tab for "00200762 Case". Below the tabs, there are two main sections: "Cases Recently Viewed Cases" (labeled "2") and "Contact Records Recently Viewed Contact Records" (labeled "3"). The "Cases" section includes a table with columns for Case Number, Contact Name, Subject, Status, Priority, Date/Time Opened, and Case Owner Alias. The "Contact Records" section includes a table with columns for Name, Account Name, Phone, Email, and Contact Owner Alias. A red box labeled "4" highlights a "Links To Training" section on the right side of the interface, which contains a "CPPA Resource" link.

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 left is the "AMERICA'S NAVY" logo and "MNCC" text. A search bar is located at the top center. Below the search bar is a navigation menu with "Home" selected. The main content area displays a "Cases" section titled "Recently Viewed Cases". Below the title, it indicates "6+ items • Sorted by Case Number • Filtered by Recently Viewed • Updated 4 minutes ago". A table of cases is shown with columns: Case Number, Contact Name, Subject, Status, Pri..., Date/T..., and C. The table contains two rows of data. Three annotations are present: a red box with a blue circle containing the number "1" around the sorting arrow in the "Case Number" column header; a red box with a blue circle containing the number "2" around the drop-down arrow in the "Subject" column header; and a red box with a blue circle containing the number "3" around the refresh icon in the top right corner of the table area.

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



The screenshot shows the Mynavy HR system interface. At the top left is the "AMERICA'S NAVY" logo. To its right is a search bar labeled "Search...". Below the logo is a navigation bar with "MNCC" and "Home" tabs. A red box highlights the "Case" tab, which has a dropdown arrow and an "X" icon. Below the navigation bar is a section titled "Cases" with a sub-header "Recently Viewed Cases". To the right of this section are three buttons: "New" (highlighted with a red box), "Change Owner", and "Printable View". Below these buttons is a search bar labeled "Search this list...". At the bottom is a table with columns: Case Number, Contact Name, Subject, Status, Priority, Date/Time Opened, and Case Owner Alias. The first row of the table contains the following data: 1, 05318212, John Doe, Test, Assigned, Medium, 2/3/2025 4:45 PM, and pfigu.

	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.)

A screenshot of the Mynavy HR system interface. The top navigation bar includes the "AMERICA'S NAVY" logo, a search bar, and a "New Case" button. Below the navigation bar, the "New Case" form is displayed, enclosed in a red rectangular box. The form has a title "New Case" and four radio button options for selecting the type of case. The first option, "PersPay Case", is selected.

AMERICA'S NAVY

Search...

MNCC Cases New Case

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--

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.

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

Date Submitted

Problem Code

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Case Origin

* Status

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Sub-Status

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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

[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 is a search bar and navigation tabs for "Pers-Pay Service C..." and "Home". Below this, a "Cases" section is visible, showing a list of 30 items. The list is sorted by Case Number and updated a few seconds ago. The first case, with Case Number 00200102, is highlighted with a red box and a blue circle containing the number 1. The second case, with Case Number 00200110, is also visible. 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	cppa-16
2	00200110	AN test Approval Process	Closed-Complete (Closed)	10/7/2020 3:21 PM	cppa-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 left is the "AMERICA'S NAVY" logo and "MNCC" navigation. A search bar and a case number "00200762" are visible. Below is a "Cases" section with a "Recently Viewed" filter. A table lists cases with columns for Case Number, Subject, and Status. The first case, "00200102" with subject "smoketest1", is selected. A right-hand panel shows "Case Comments (0)", "Files (1)", and "Case Team (1)". The file "Test test best" (12KB docx) is highlighted with a red box and a blue circle labeled "2". A smaller inset shows a mobile view of the file details with a "Download" button highlighted by a red box and a blue circle labeled "3".

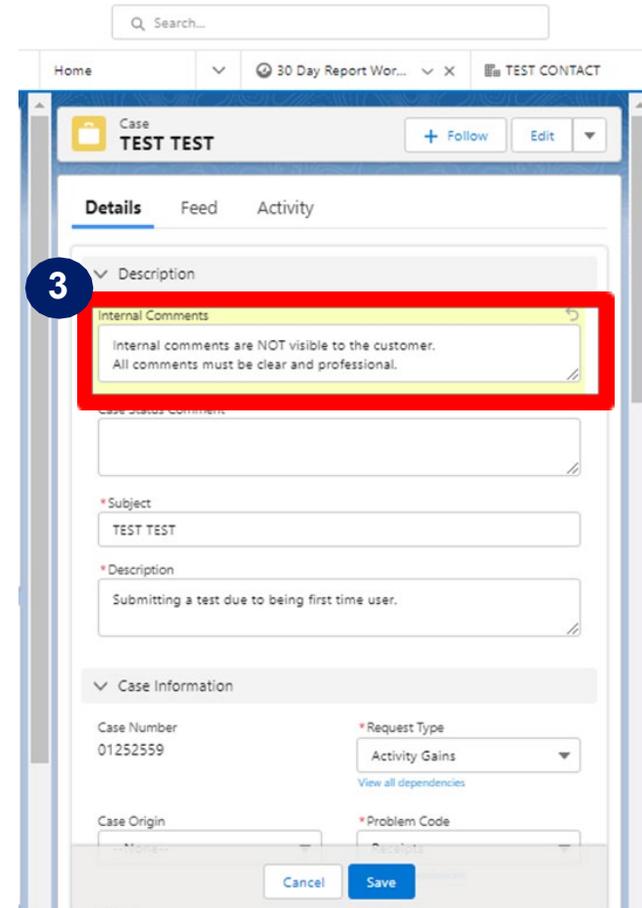
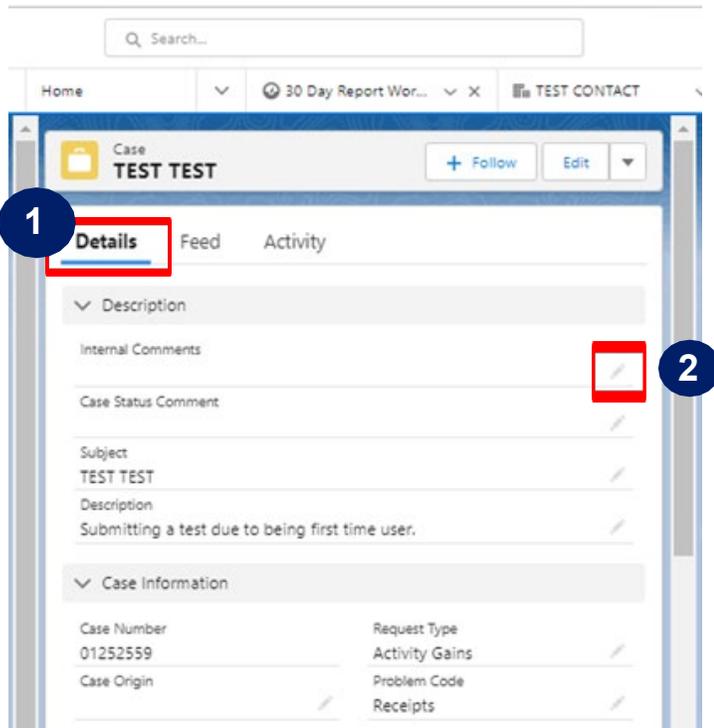
Case Number	Subject	Status
1 00200102	smoketest1	Submitte
2 00200110	AN test Approval Process	Closed-C

- 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

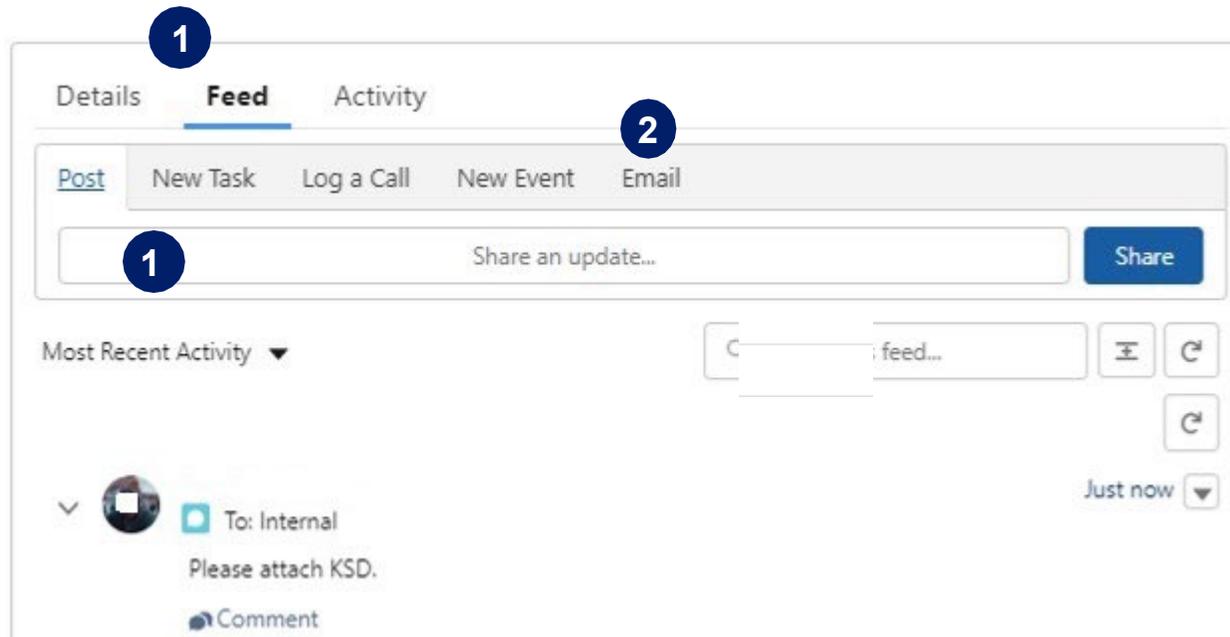


- 1 Find the **Details** tab
- 2 Select the **Internal Comments** pencil



- 3 Add comments then click **Save**

Feed



- 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. The first step highlights the selection of a case number (00200755) in a table. The second step highlights the "Activity" tab in the case details view. The third step highlights the "Case History (1)" table, which contains one entry: a case created on 10/18/2020 5:29 ... by NAVY CPPAUser-1.

Case Number	Contact Name	Subject	Status
00200755	JEDY NAVAL SMITH	test	[Initiated]
00200754	JEDY NAVAL SMITH	1871 Test Standar	
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



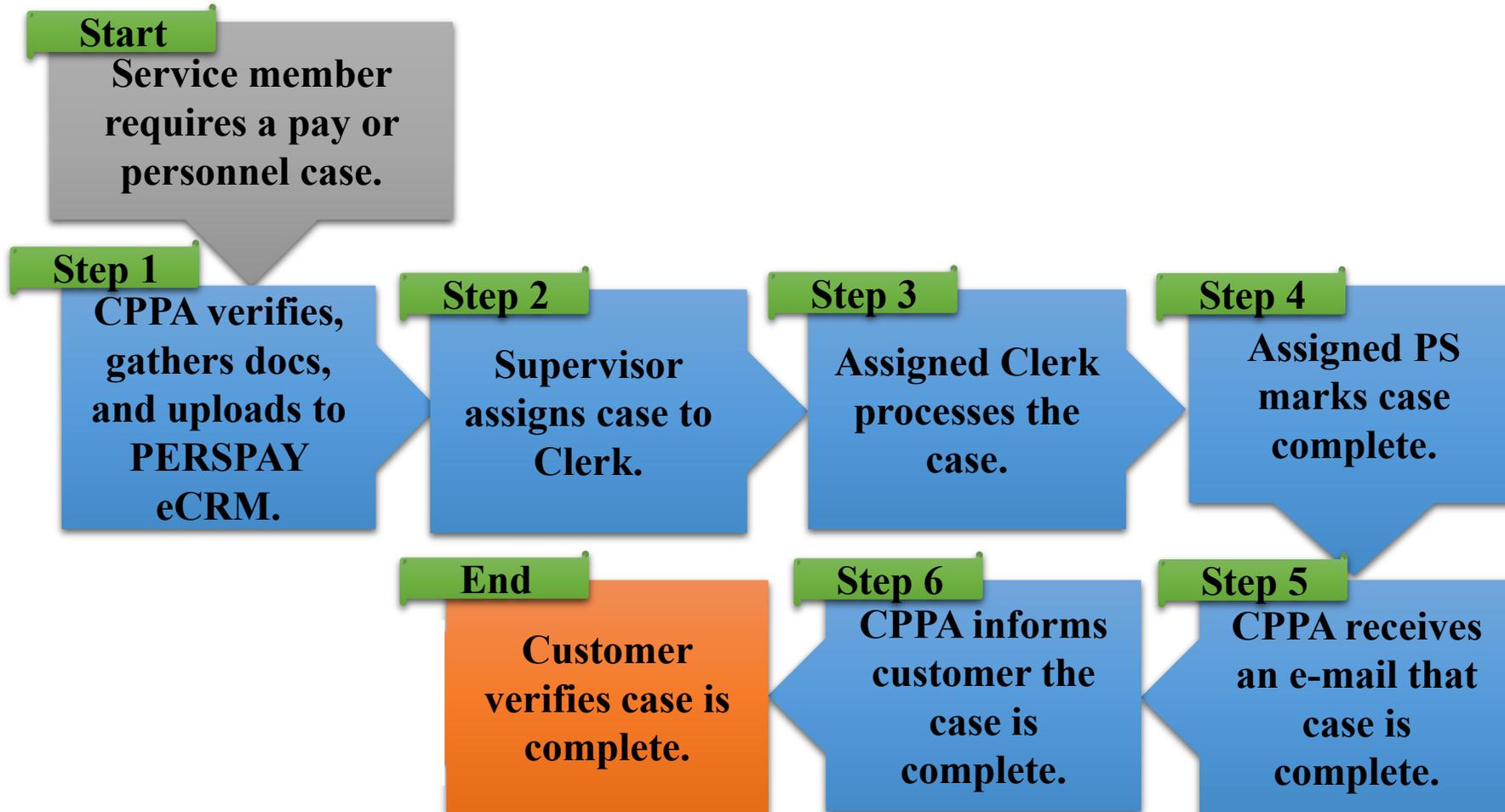
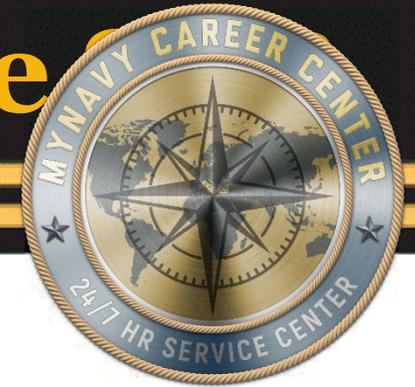
The "CPPA Command" Dashboard is available in PERSPAY eCRM as of 1 Nov 22.

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/>

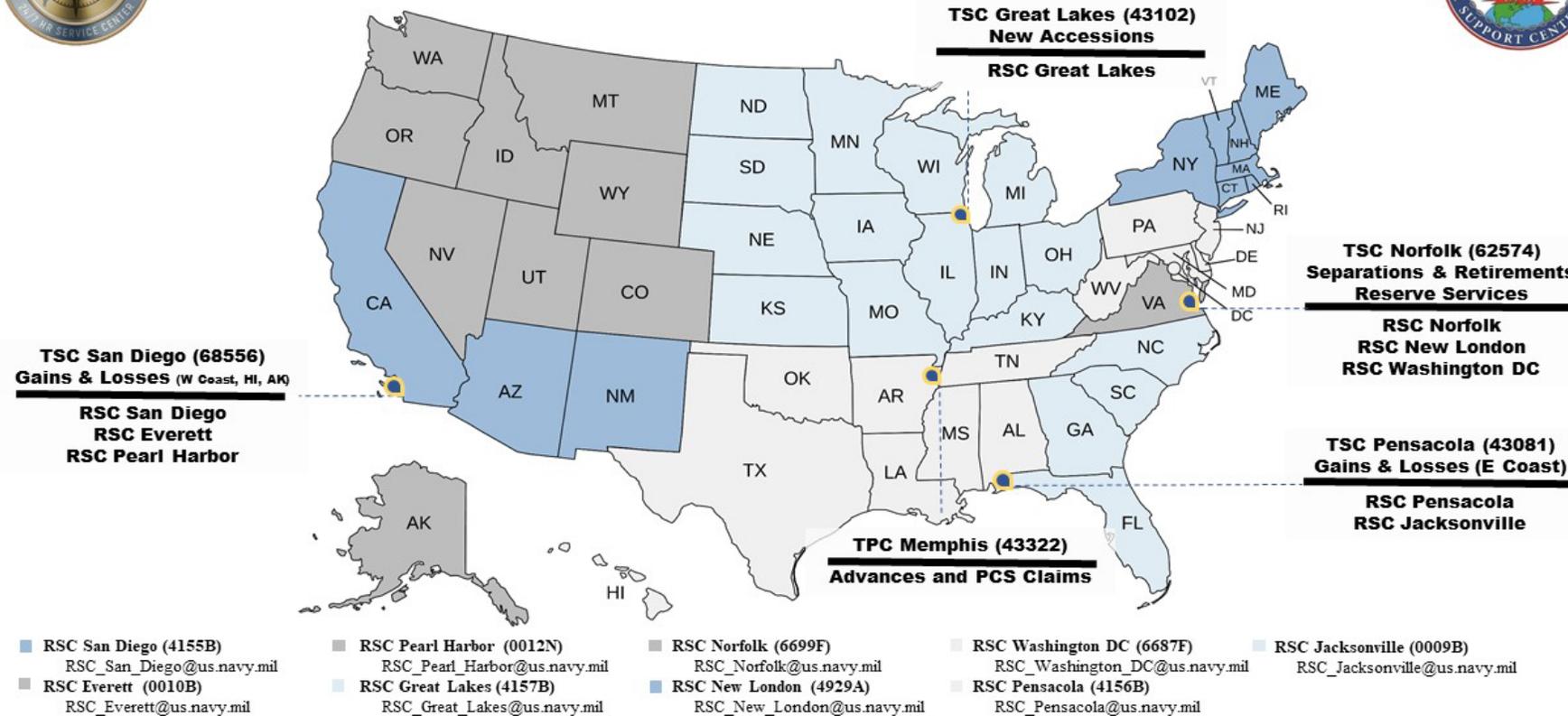
Standard Operating Procedure



Transaction Service Center and Regional Support Center Locations



Transaction Service Centers & Regional Support Centers (CONUS)

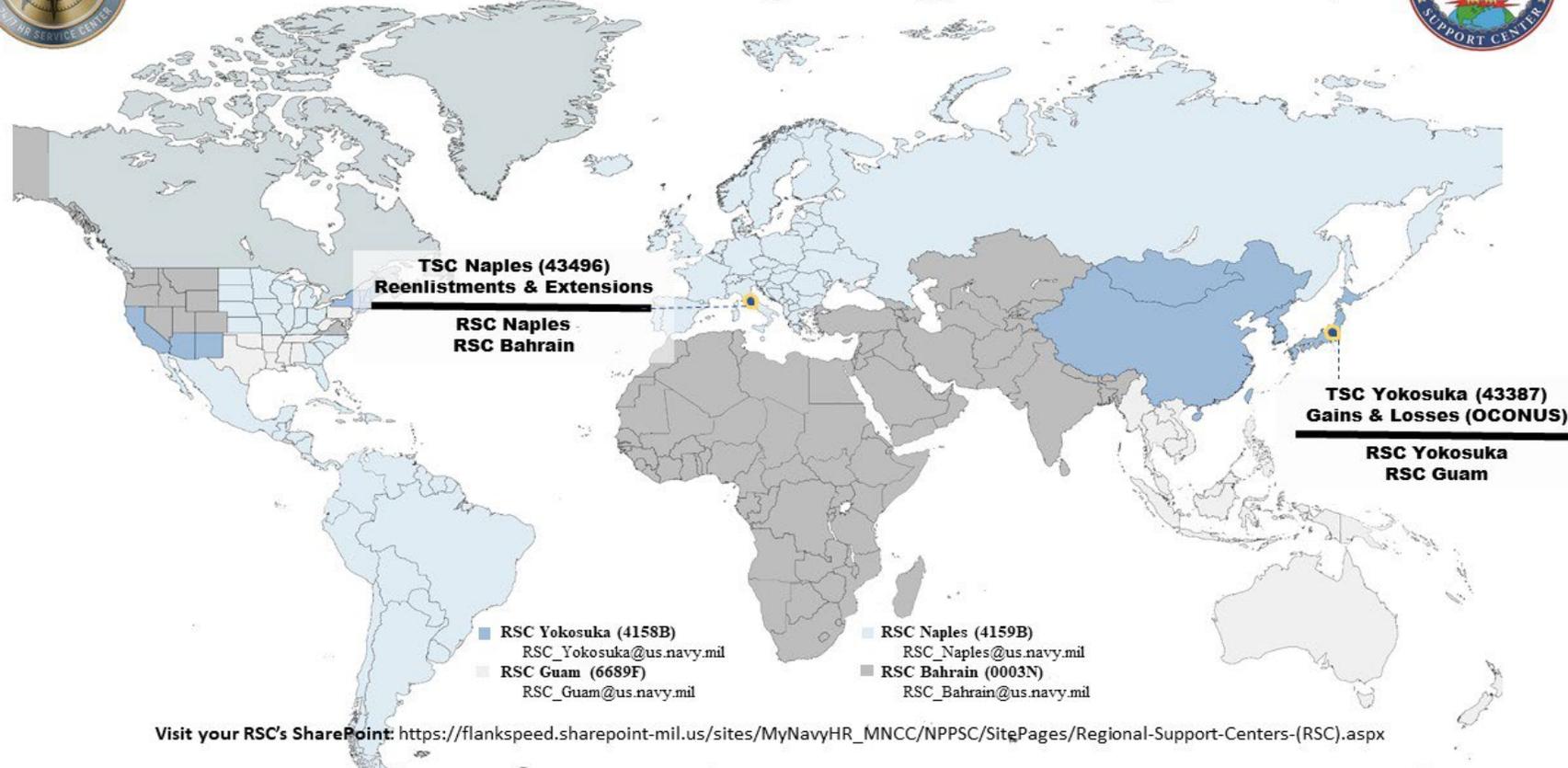


Visit your RSC's SharePoint: [https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/NPPSC/SitePages/Regional-Support-Centers-\(RSC\).aspx](https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/NPPSC/SitePages/Regional-Support-Centers-(RSC).aspx)

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