



eCRM MyNavy Tracker CPPA Standard Operating Procedure (SOP)

As the CPPA, you can prepare, send, and monitor the status of the Pre Loss Envelope. Use the following steps to complete these actions. This SOP outlines the electronic process of submitting a PCS via eCRM to alleviate discrepancies prior to and during detachment.

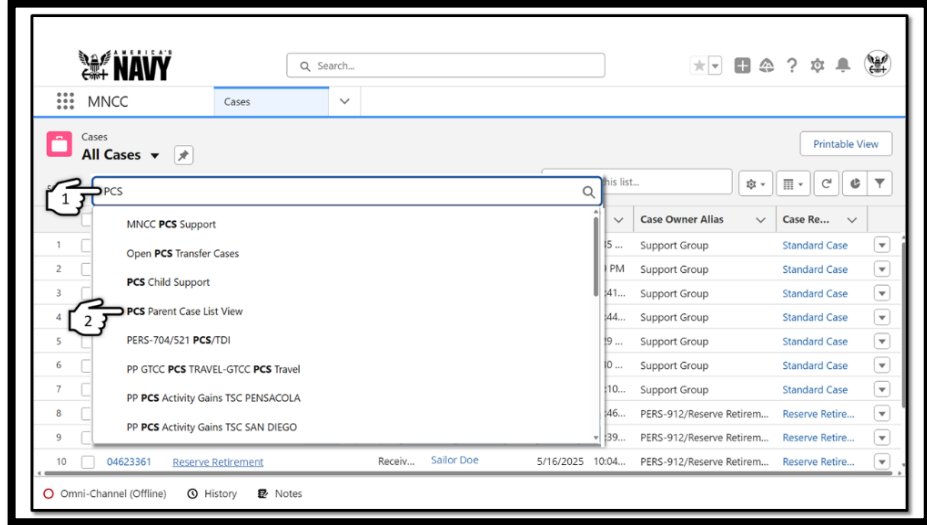
- 1 [Verify Pre-Travel Questionnaire](#)
- 2 [Add Self as CPPA to PCS Entitlement Case](#)
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Permanent Change of Station (PCS)-Pre Loss Actions

1 Verify Pre-Travel Questionnaire Completion

Step 1:

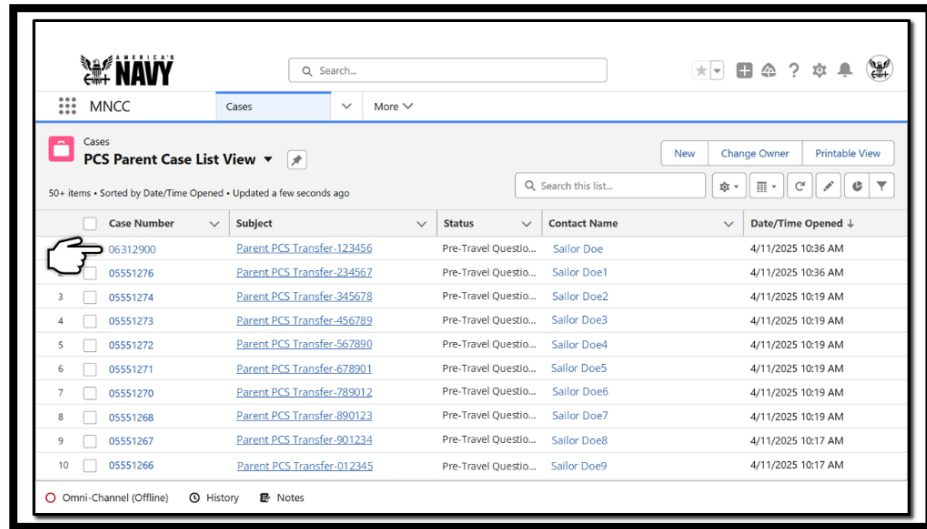
In the Cases tab, enter **PCS** in the Search Field, then click **PCS Parent Case List View**.



Step 2:

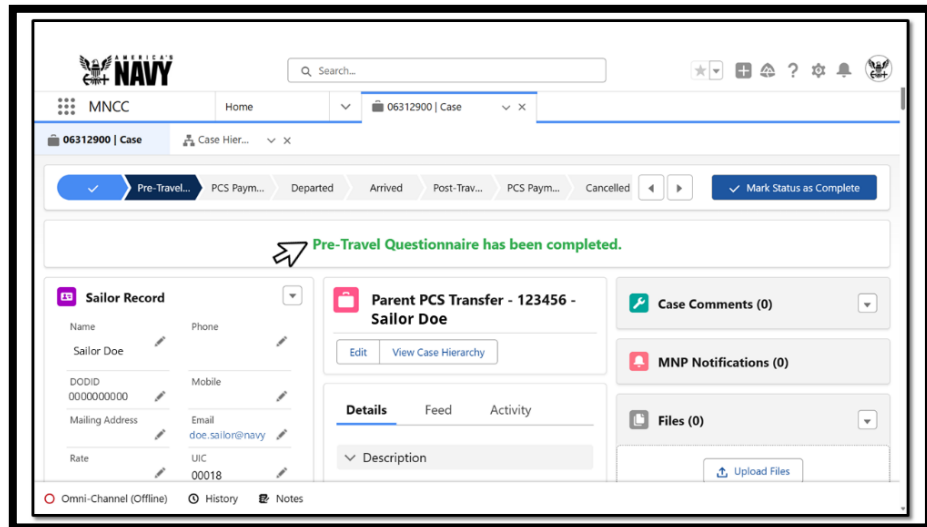
Click the **Case Number** of a Parent Case to open the case.

Note: Parent Cases are auto generated into eCRM once a member's orders are released.



Step 3:

Verify the Pre-Travel Questionnaire completion banner displays in the case layout.



Permanent Change of Station (PCS)-Pre Loss Actions

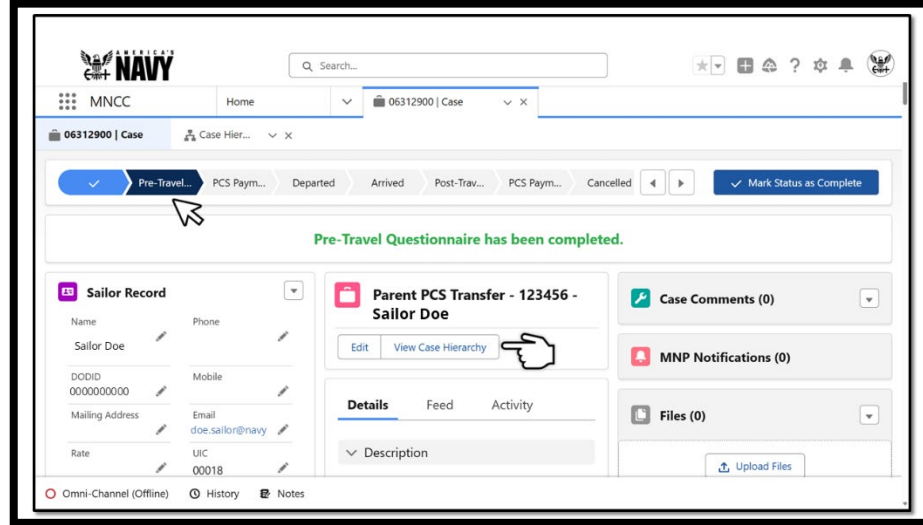
2 Add Self as CPPA to PCS Entitlement Case

Step 1:

In the Parent Case view, click **View Case Hierarchy**.



Note: During this step, the case will be in Pre-Travel status.

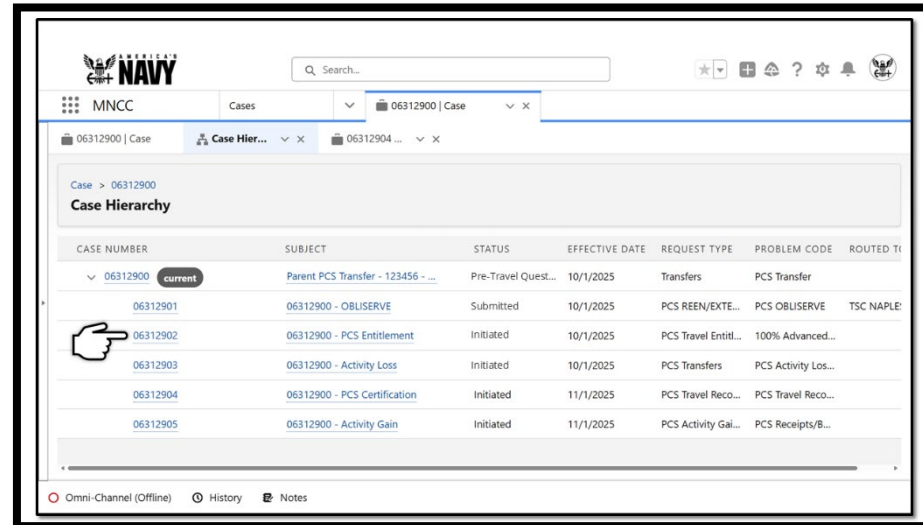


Step 2:

Click the **Case Number** of the **PCS Entitlement** Child Case.

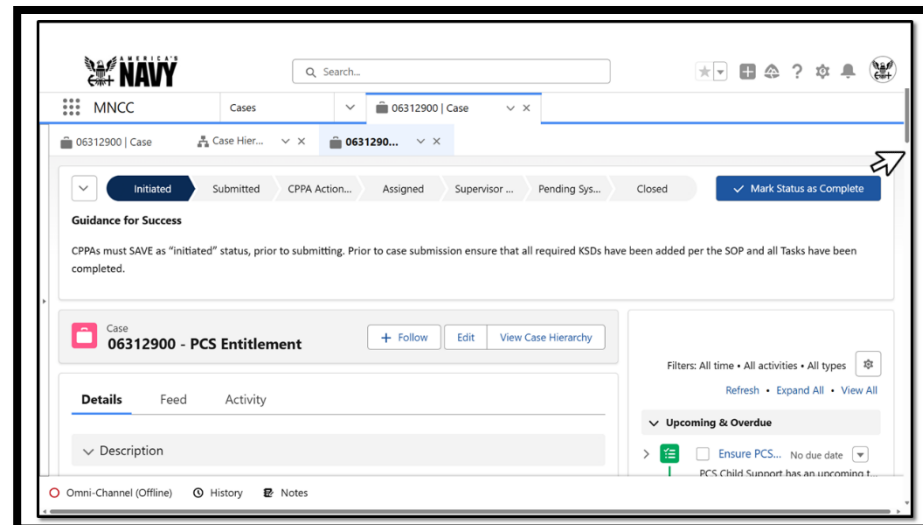


Note: The four basic child cases are created when orders are released regardless of questionnaire completion. The addition of the NAVPTO/MILPAY child cases are created if elected in the questionnaire.



Step 3:

Scroll down to the **Related Users** tile.

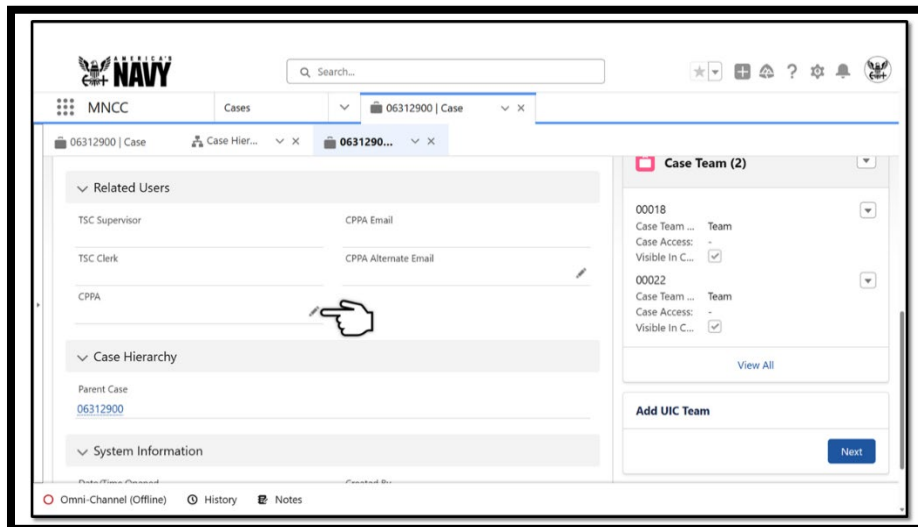


Permanent Change of Station (PCS)-Pre Loss Actions

Add Self as CPPA to PCS Entitlement Case (cont'd)

Step 4:

Click the **Pencil** Icon in the **CPPA field**.

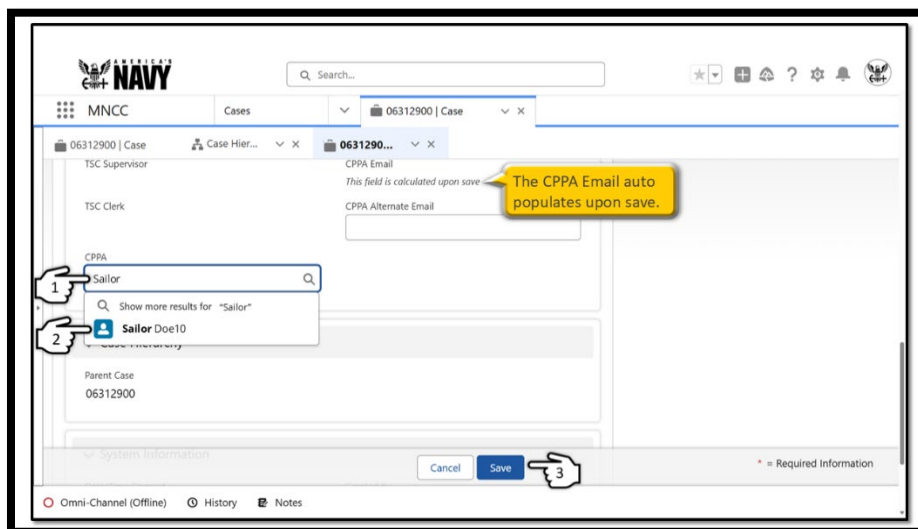


Step 5:

Enter your name in the **CPPA** field, select your **Name** from the list of options, then click **Save**.

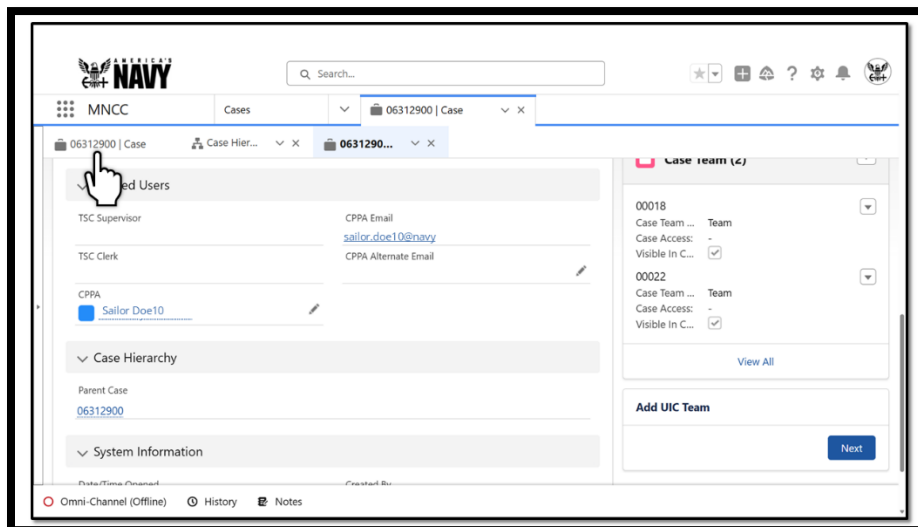


Note: You must save changes to the CPPA field before making additional edits to the Child Case.



Step 6:

When finished, click the **Parent Case Sub-tab**.

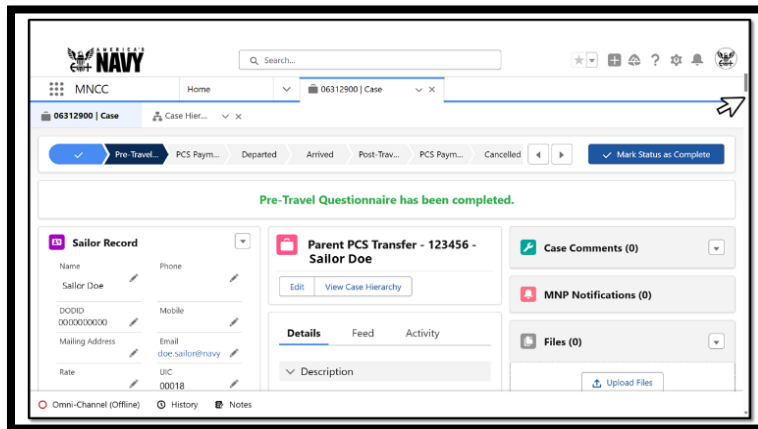


Permanent Change of Station (PCS)-Pre Loss Actions

3 Add Loss Approving Official Information

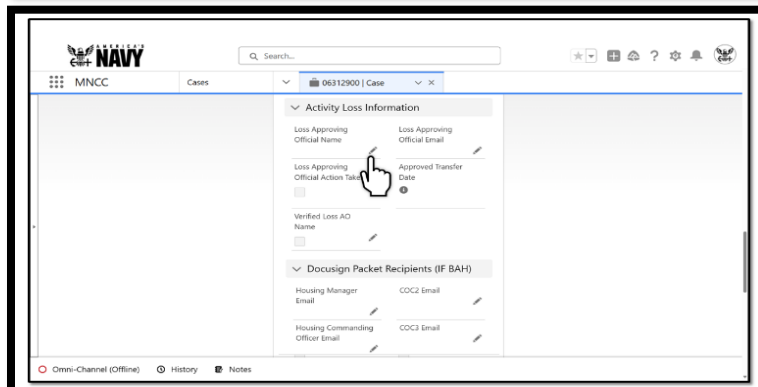
Step 1:

In the Parent Case View, **Scroll** down to the **Activity Loss Information** tile.



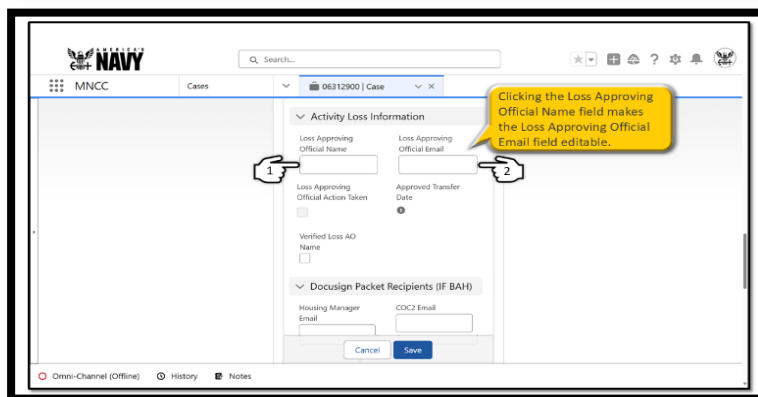
Step 2:

Click the **Pencil Icon** in the **Loss Approving Official Name** field.



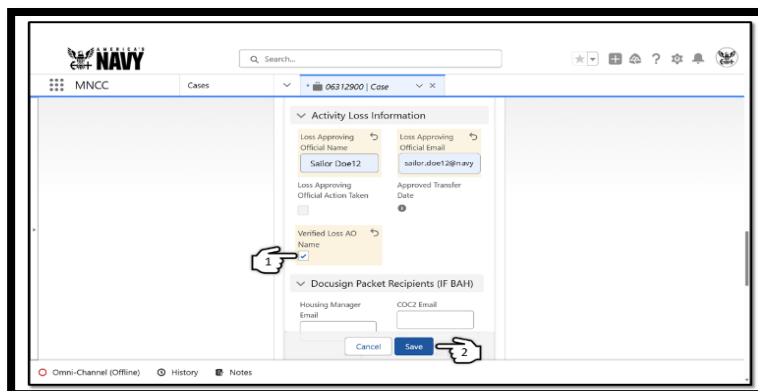
Step 3:

Enter the **Loss Approving Official's Name**, then enter their **Email**.



Step 4:

Click the **Verified Loss AO Name** **Checkbox**, then click **Save**.



Permanent Change of Station (PCS)-Pre Loss Actions

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Prepare to Send Pre Loss Envelope

 **You must complete the following tasks prior to sending the Pre Loss Envelope:**

1. Verify the **Pre-Travel Questionnaire** is completed.
2. Verify the **Service Member's email** field in the Sailor PCS Questionnaire form is filled out.
3. As the CPPA, add yourself to the **PCS Entitlement Child Case**.
4. Add Loss **Approving Official (AO)** name and email to the Parent Case.

When you submit the Loss Envelope, valid and complete information displays in green in the PCS Send Envelope checklist, and invalid or incomplete information displays in red. You should always ensure each item is valid or complete. ***Invalid or incomplete information must be corrected prior to completing the PCS Send Envelope flow.***

Invalid or Incomplete

PCS Send Envelope

The Pre-Travel Interview in the Sailor PCS Interview form is complete

The Service Member Email field in the Sailor PCS Interview form must be filled out before sending the Pre-Loss Envelope

The CPPA field in the PCS Entitlement child case is valid

The Loss Approving Official Email field in the parent Transfer case is valid

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Valid and Complete Information

PCS Send Envelope

The Pre-Travel Interview in the Sailor PCS Interview form is complete

The Service Member Email field in the Sailor PCS Interview form is valid

The CPPA field in the PCS Entitlement child case is valid

The Loss Approving Official Email field in the parent Transfer case is valid

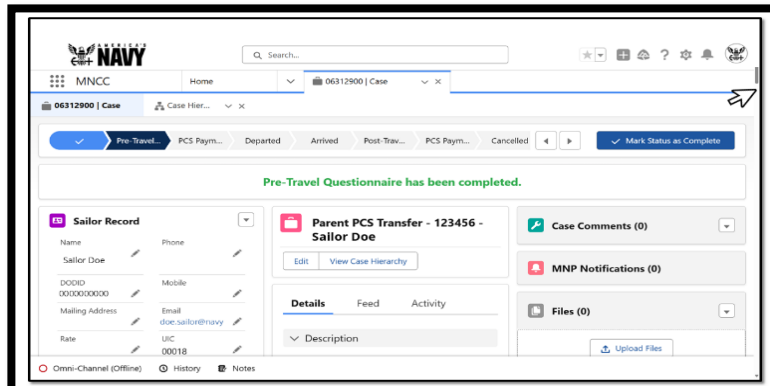
[Previous](#) [Finish](#)

Permanent Change of Station (PCS)-Pre Loss Actions

5 Send Pre Loss Envelope

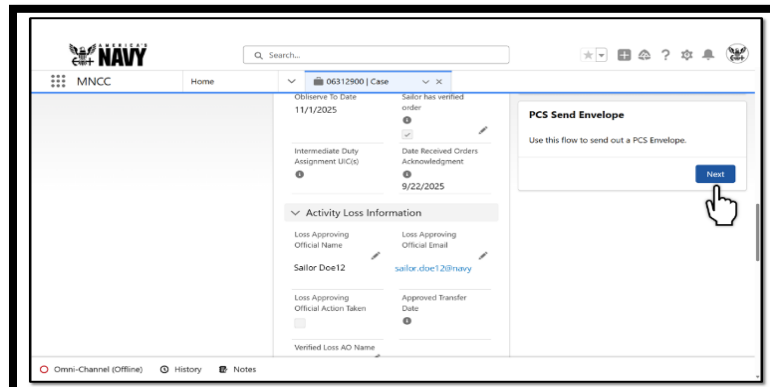
Step 1:

In the Parent Case View, **Scroll** down to the **PCS Send Envelope** tile.



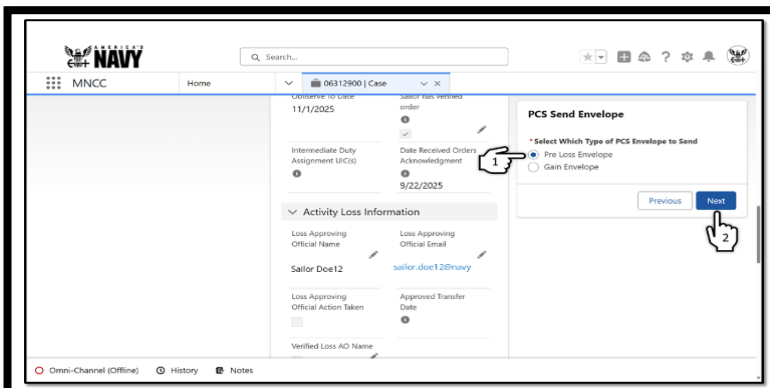
Step 2:

Click **Next** on the **PCS Send Envelope** tile.



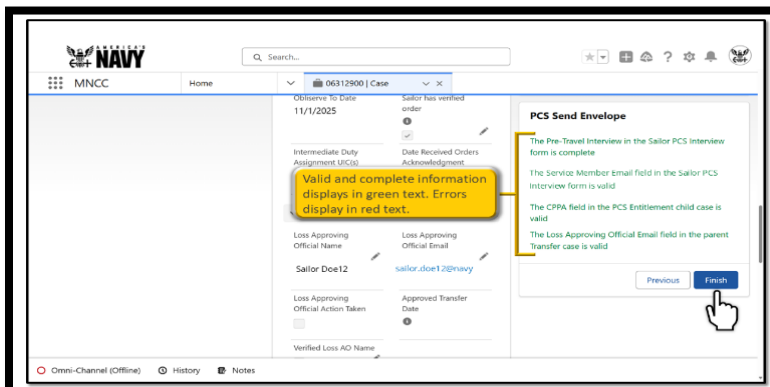
Step 3:

Click the **Pre Loss Envelope** Radio button, then click **Next**.



Step 4:

Review the PCS Send Envelope Checklist, Click **Finish**.



Note: You must correct any checklist items that display in red before completing the envelope flow. Color deficient personnel should read all text to ensure items are valid and/or complete.

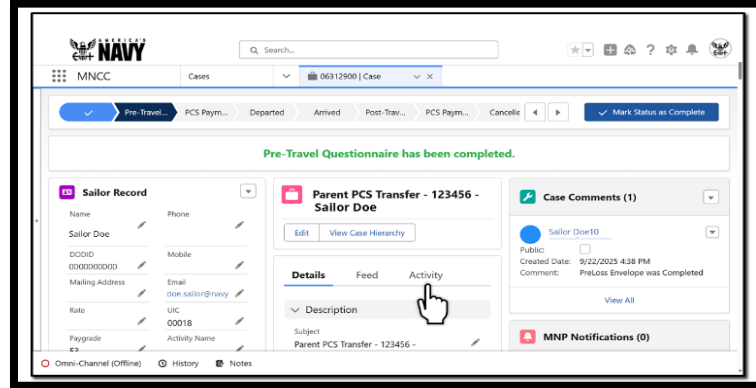
Permanent Change of Station (PCS)-Pre Loss Actions

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View DocuSign Envelope Status

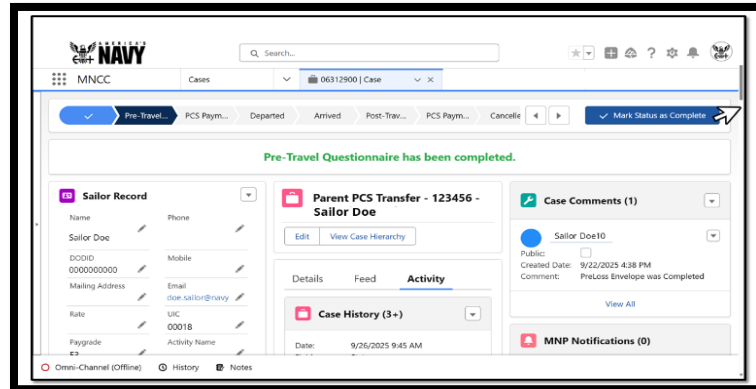
Step 1:

In the Parent Case view, click the **Activity Tab**.



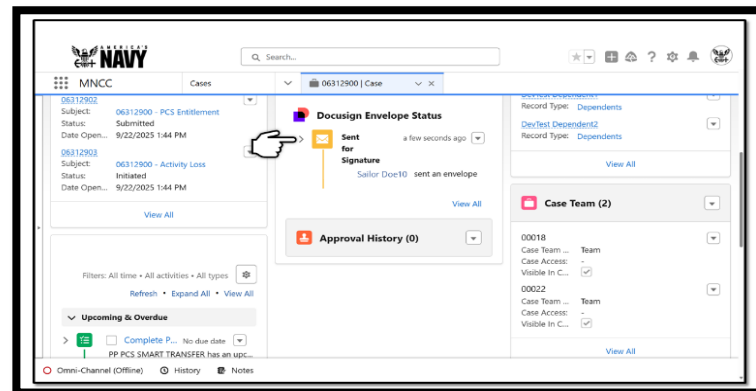
Step 2:

Scroll down to the **DocuSign Envelope Status** tile.



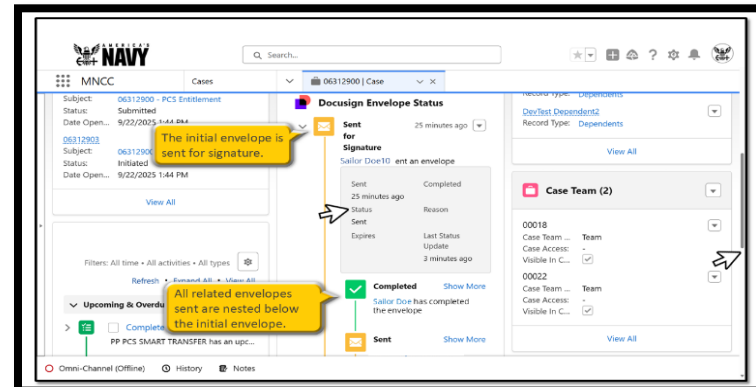
Step 3:

The DocuSign Envelope Activity displays in a collapsed view. Click the **Arrow** to expand and view details.



Step 4:

Review the Status of the envelope, then **Scroll** down to view additional routing details.



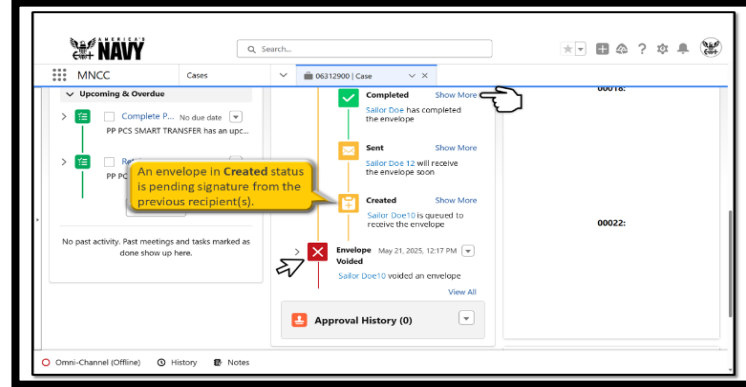
Note: Completed envelopes display with a green checkmark.

Permanent Change of Station (PCS)-Pre Loss Actions

View DocuSign Envelope Status (cont'd.)

Step 5:

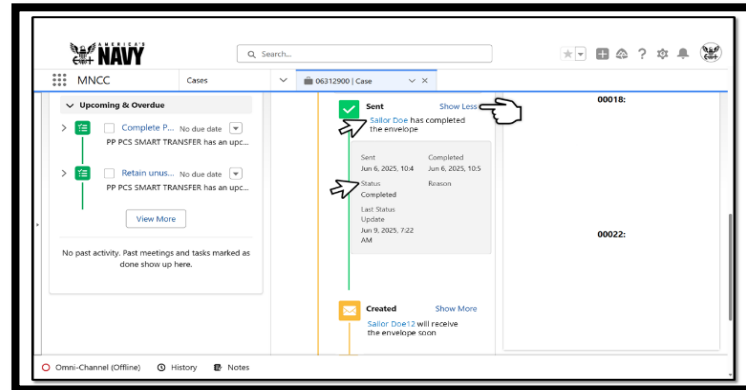
Each envelope displays routing details. View the routing details, then click **Show More** to expand and view status details.



Note: Voided Envelopes display with a red X. Users should ensure each item is valid and complete.

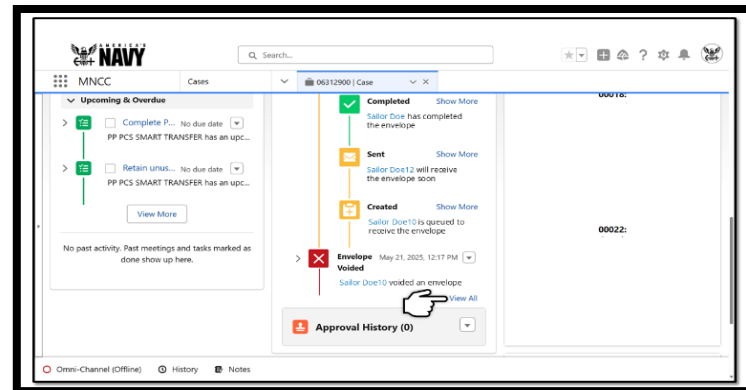
Step 6:

Review the status and routing details, then click **Show Less** to collapse the view.



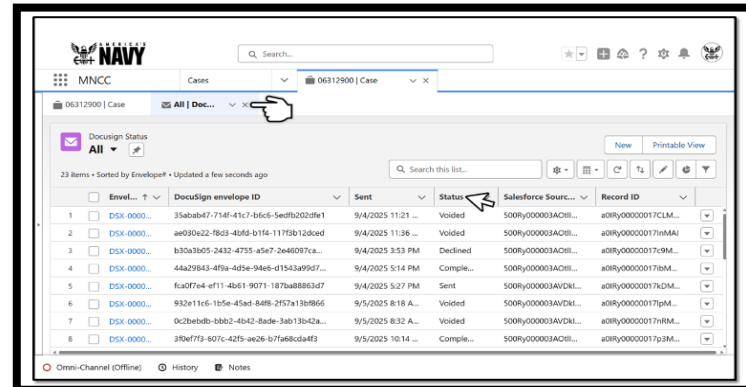
Step 7:

Click **View All** to open the DocuSign sub-tab and view all activity.



Step 8:

Review the date Sent and Status of each Envelope, as needed. When finished, click the **X** to close the sub-tab.



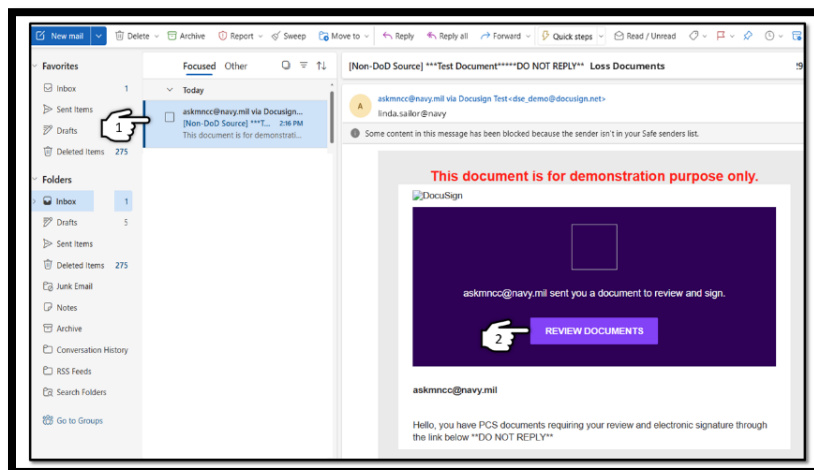
Permanent Change of Station (PCS)-Pre Loss Actions

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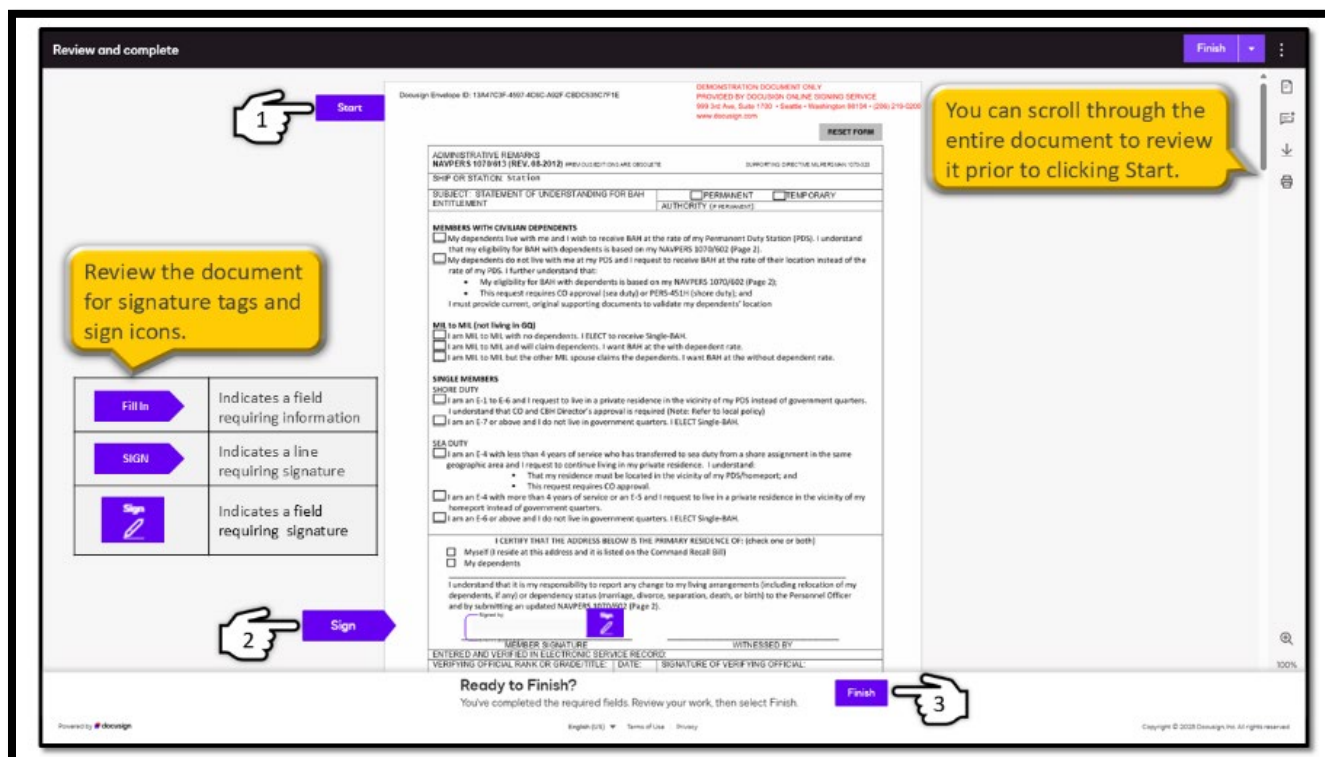
Review and Sign DocuSign Documents

PCS Documents requiring signature are processed using **DocuSign** and sent to you via email. **Follow the steps below to review and sign documents.**

Step 1: Open the DocuSign **Email**, then click **Review Documents** to open



Step 2: Click **Start**, review the document for accuracy and fill in required information, then click **Sign**. When finished, click **Finish**.



Permanent Change of Station (PCS)-Pre Loss Actions

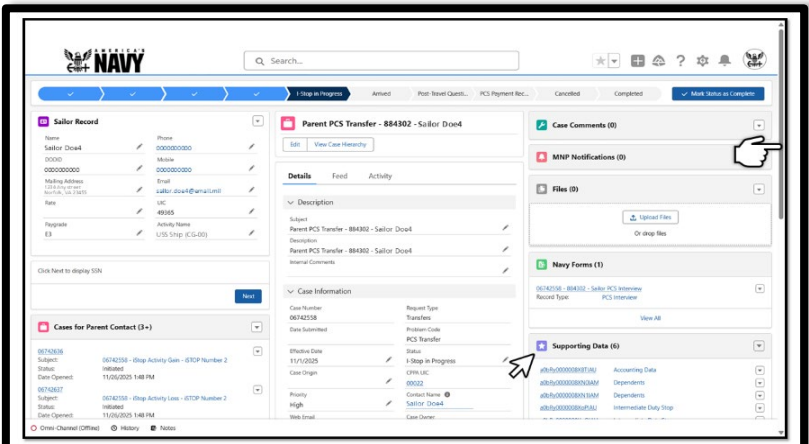
8 View I-STOP Information

The "I-Stop In Progress" status was added to the PCS Case tracker so CPPAs could have clear visibility to a Sailor currently at an I-Stop within a PCS parent case. *Follow the steps below to view I-STOP information in the **Supporting Data** tile.*

Step 1:

In the Parent Case view, scroll down to the **Supporting Data** tile.

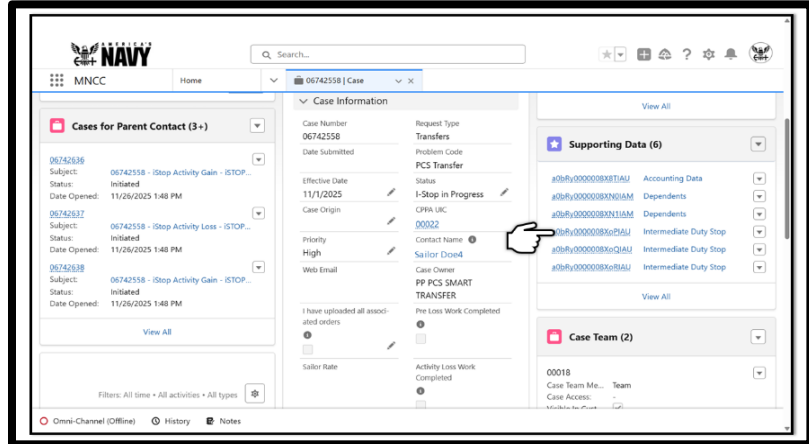
Note: The I-STOP information comes from the Sailor's orders.



Step 2:

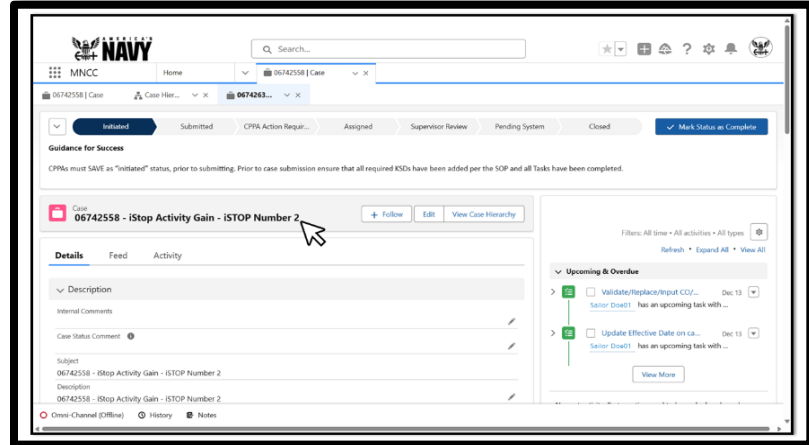
Click an **Intermediate Duty Stop** link.

Note: The number of the I-stop will correspond to the Sailors orders. CPPA should review all sets of orders prior to commencing work on the Sailor's cases.



Step 3:

Review the I-STOP information.



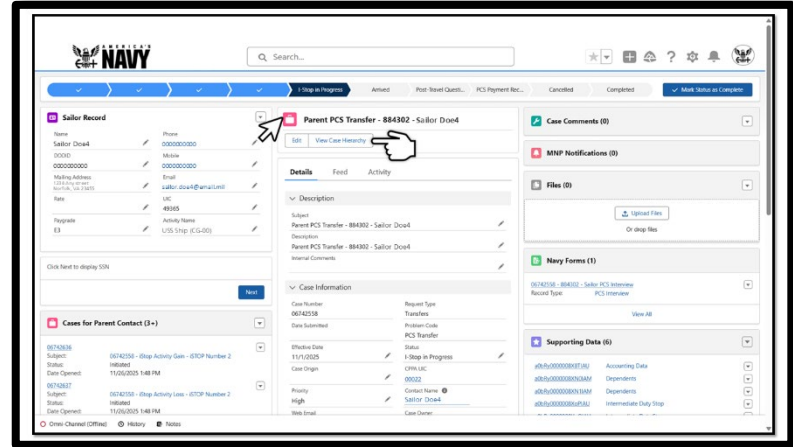
Permanent Change of Station (PCS)-Pre Loss Actions

View I-STOP Information (cont'd.)

Follow the steps below to view I-STOP information on the **Case Hierarchy** page.

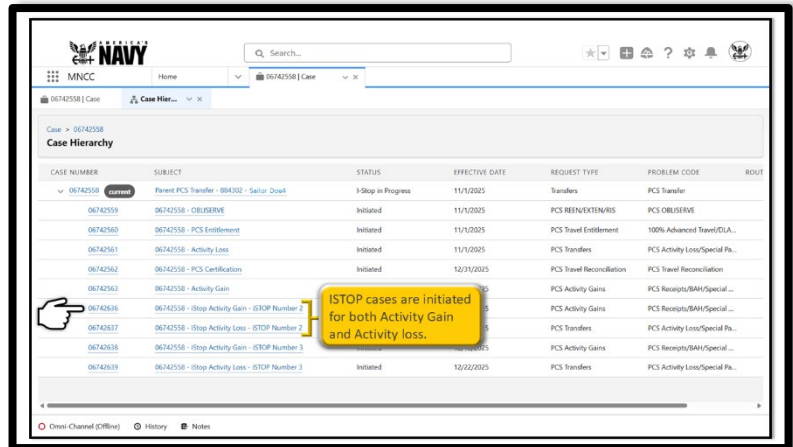
Step 1:

In the Parent Case view, click the **View Case Hierarchy** button.



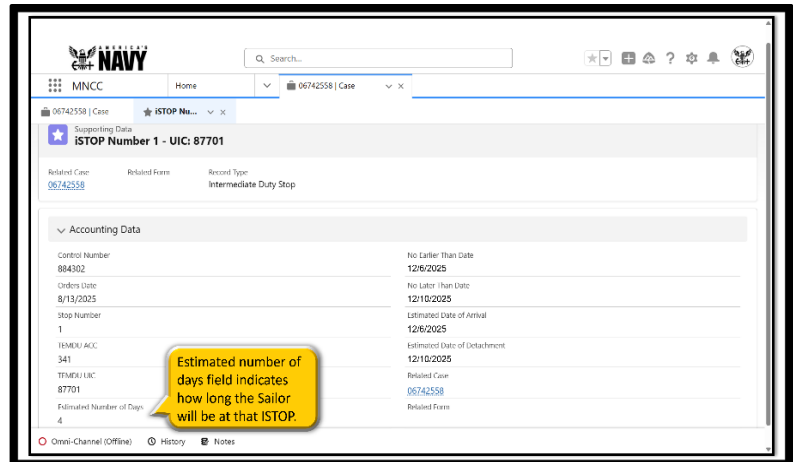
Step 2:

On the Case Hierarchy page, click a **Case Number**.



Step 3:

Review the I-STOP information.



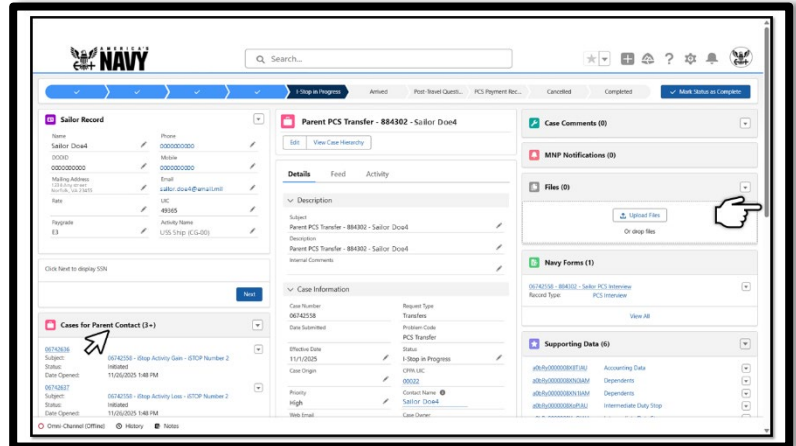
Permanent Change of Station (PCS)-Pre Loss Actions

View I-STOP Information (cont'd.)

Follow the steps below to view I-STOP information on **the Cases for Parent Contact tile**.

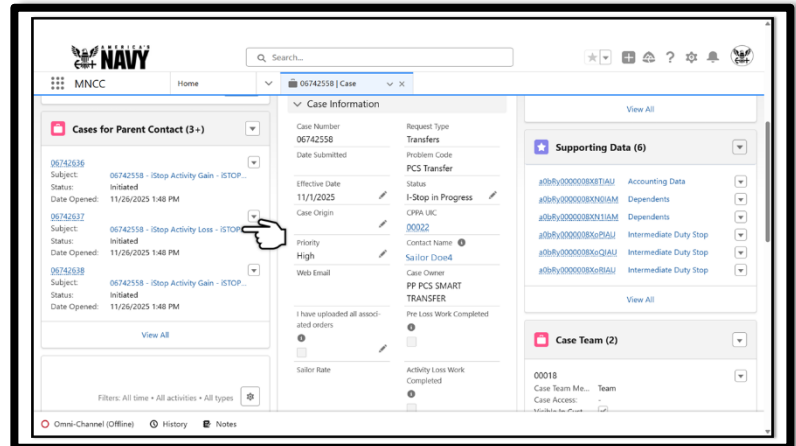
Step 1:

In the Parent Case view, scroll down to the **Cases for Parent Contact Tile**.



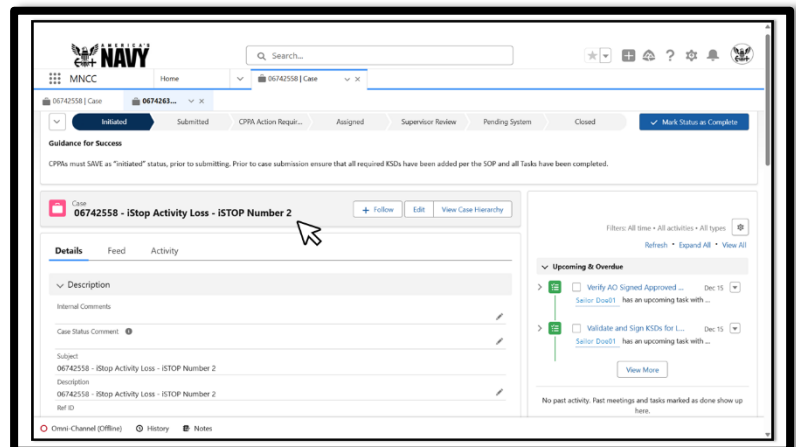
Step 2:

On the Cases for Parent Contact tile, click a **Case Number** or **Case Link**.



Step 3:

Review the I-STOP information.



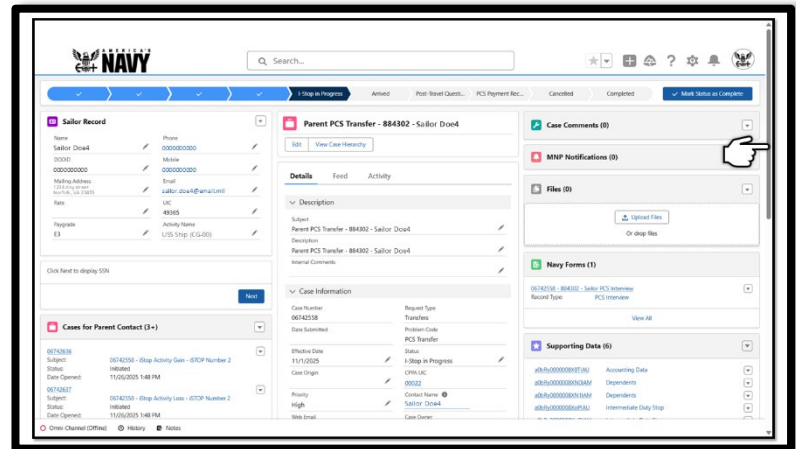
Permanent Change of Station (PCS)-Pre Loss Actions

View I-STOP Information (cont'd.)

A new field called the “Intermediate Duty Assignment UICs” was added to the parent case and displays all the I-STOPS regardless of the duration. *Follow the steps below to view **Intermediate Duty Assignment UICs** field.*

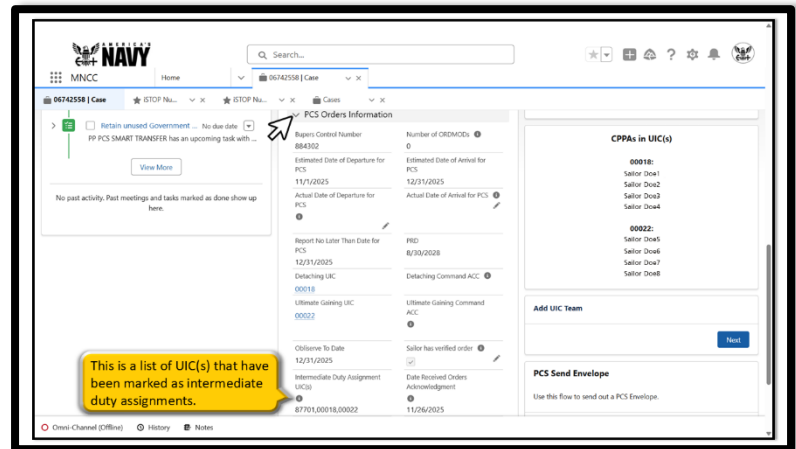
Step 1:

In the Parent Case view, scroll to the Intermediate Duty Assignment UIC(s) field in the **PCS Orders Information** tile.



Step 2:

Review the I-STOP information.



For details regarding these cases, refer to their respective Activity Loss and Activity Gain child cases.

This is a list of UIC(s) that have been marked as intermediate duty assignments.