



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

- Once logged into Salesforce, select **Cases** from the home drop-down menu.
- From the Cases page, select **New** from the top right corner to create a case.

Pers-Pay Service C... Home

Cases Recently Viewed

25 Items • Updated a minute ago

Case Num...	Subject	Date/Time Opened
1 00200761	TEST TEST	10/20/2020 1
2 00200760	GAIN, RPT 10/01/2020, PSSN BROCKMAN	10/20/2020 1
3 00200758	GAIN, RPT 10/01/2020, PSSN BROCKMAN	10/20/2020 1
4 00200757	GAIN, PSSN BROCKMAN, RPT	10/20/2020 1

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

☐ PersPay PayOps Restricted
This case type is used to process cases that contain sensitive pay information

Cancel Next

Pers-Pay Service C... Home

Cases Recently Viewed

6+ Items • Sorted by Case Number • Filtered

Case N...	Contact Nam	Status
1 00200181		Submitted
2 00200219	JOHNY JOE S	Closed-Complete (Closed)
3 00200245		CPPA Action Required
4 00200413	JOHNY JOE S	Assigned
5 00200458	JOHNY JOE S	Submitted

Home

Cases

Contact Records

Reports

Dashboards

Approval Requests

- The New Case pop-up will appear. Select the **type of case** you want to initiate and then select **Next**.
- The New Case page will appear. In this example, we will go through a *PersPay Case* type. **Enter** all case details. The below items marked with a red asterisk are required in order to save.
 - Subject**
 - Description**
 - Request Type**
 - Problem Code**
 - Status:** Enter *Initiated*
 - Routed PSD**
 - Contact Name**
- To upload all relevant files, select **Upload File** under the Files section on the right-hand column.



Reminder: 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)

Files (0)

Upload Files

Or drop files

Case Team (1)

NAVY CPPAUser-4

Membr... CPPA

Case ... Read/Write

Visible... []

View All

Approval History (0)

Details Feed Activity

> Description

Case Information

Case Number: 00200765

Case Origin: []

Priority: Medium

Needed By: []

Section Category: []

Routed PSD: AFLOAT EAST

Request Type: Activity Gains

Problem Code: []

Receipts: []

Status: Initiated



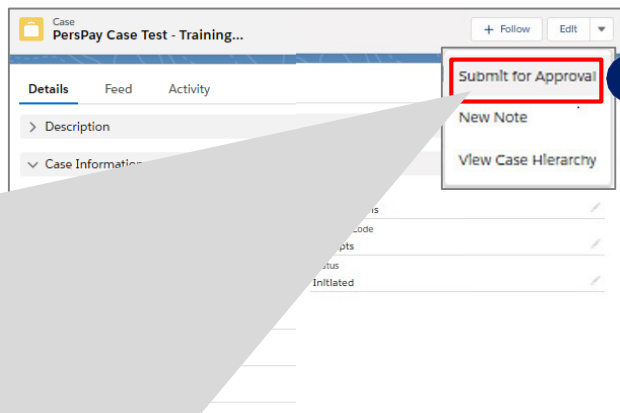
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Please follow the steps below to ensure you can perform your role as a CPPA in Salesforce.

Part 2: Submit Case for Approval

- 6** 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.



Submit for Approval

Comments **7**

8 Submit

- 7** The Submit for Approval pop-up will appear. **Enter comments** to help the TSC/PSD process the case.

- 8** Select **Submit**.

- 9** Next, you will need to select the next approver of the case. From the drop-down, select **Queue** and enter the name of the appropriate TSC/PSD queue. A drop-down of available queues will appear. Select the appropriate queue.

- 10** Confirm you have selected the right queue for the case. Then, select **Submit**. The case has been rerouted to the appropriate queue for review and processing.

Submit for Approval

*Choose Next Approver **9**

pp act

Q "pp act" In Queues

- PP ACTIVITY GAINS-AFLOAT EAST
- PP ACTIVITY GAINS-AFLOAT WEST
- PP ACTIVITY GAINS-ATSUGI
- PP ACTIVITY GAINS-BAHRAIN
- PP ACTIVITY GAINS-CHARLESTON



Note: When submitting a case for approval, you are to always select a queue for the next approver and not an individual person.

Submit for Approval

*Choose Next Approver

PP ACTIVITY GAINS-AFLOAT EAST

10 Submit



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.**