



Unclassified

# Personnel and Pay enterprise Customer Relationship Management (PERSPAY eCRM)

- Instructor Introduction
- Administrative Notes

Revision: May2026

Approved for Public Release; Distribution is Unlimited



# Objectives



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

# Introduction



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In this lesson we will cover:

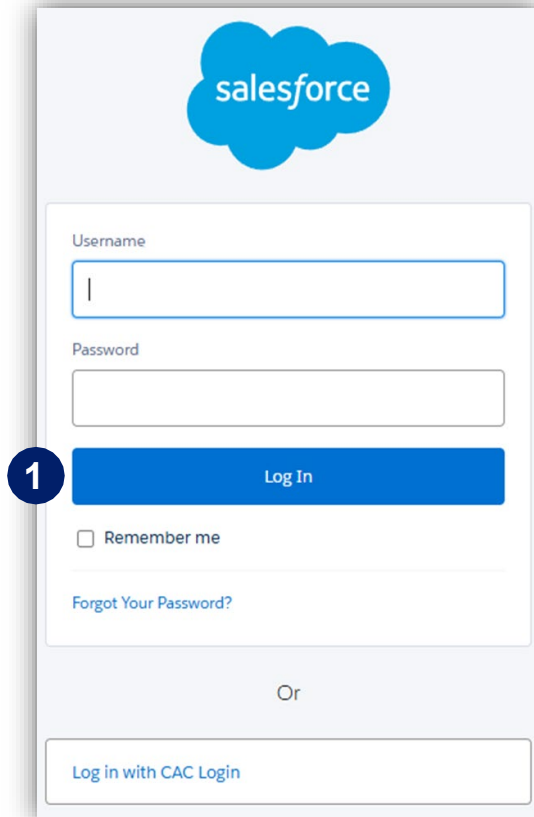
- PERSPAY eCRM Logon
- Basic familiarization
- Creating a case
- Uploading & viewing documents, comments, and history
- Personally Identifiable Information (PII)
- FAQs

# Log In



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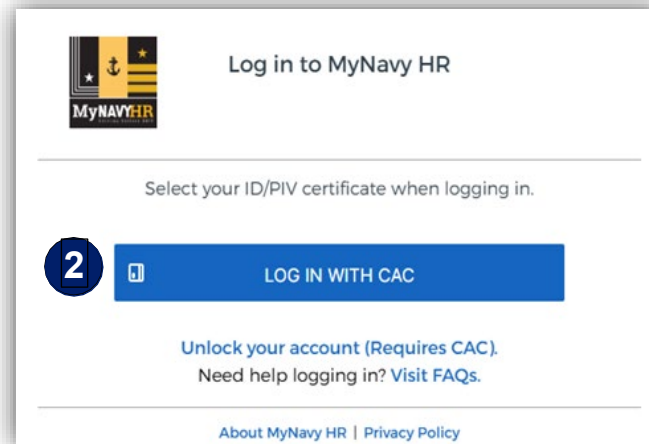
Access eCRM using: <https://navynpc.my.salesforce.mil>



1

Click CAC Login

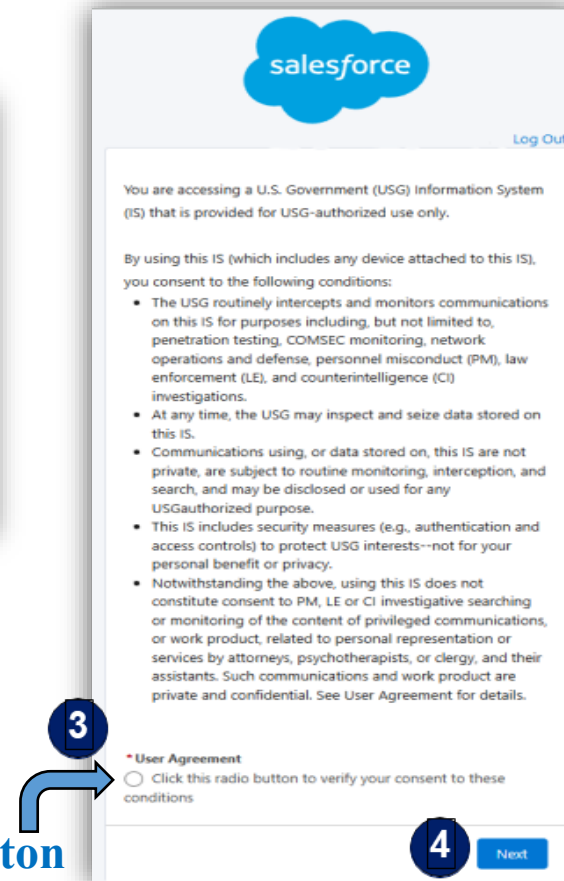
The image shows the Salesforce login page. At the top is the Salesforce logo. Below it are fields for Username and Password. A blue 'Log In' button is highlighted with a circled '1'. Below the button is a 'Remember me' checkbox and a 'Forgot Your Password?' link. At the bottom, there is a link for 'Log in with CAC Login'.



2

Click Radio Button

The image shows the MyNAVY HR login page. It has the MyNAVY HR logo and the text 'Log in to MyNAVY HR'. Below this is a prompt to 'Select your ID/PIV certificate when logging in.' A blue button labeled 'LOG IN WITH CAC' is highlighted with a circled '2'. Below the button are links for 'Unlock your account (Requires CAC)' and 'Need help logging in? Visit FAQs.' At the bottom are links for 'About MyNavy HR' and 'Privacy Policy'.



3

Click Next

The image shows the Salesforce user agreement page. It has the Salesforce logo and 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.' It then lists conditions of use. At the bottom, there is a 'User Agreement' section with a radio button and a 'Next' button. The radio button is highlighted with a circled '3', and the 'Next' button is highlighted with a circled '4'.

# Navigating PERSPAY eCRM

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A screenshot of the PERSPAY eCRM web application interface. The interface includes a top navigation bar with the Navy logo, a search bar, and a user profile dropdown. A sidebar menu is visible on the left. Numbered callouts (1-5) and lettered callouts (A-C) highlight specific features: 1. Navigation Tab (Home dropdown), 2. Search bar, 3. Help function (? icon), 4. Notifications (bell icon), 5. Avatar (user profile icon). The user profile dropdown is expanded, showing options for Log Out (A), Settings (B), and Display Density (C). The Display Density section shows options for Comfy (selected) and Compact.

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



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The screenshot shows the MyNAVYHR Home Menu. At the top left is the "AMERICA'S NAVY" logo. Below it is a navigation bar with "MNCC" and "Home" tabs. A search bar is on the right. A red box labeled "1" highlights the "00200762 Case" tab. Below the navigation bar, there are two main sections. The first section, labeled "2", is titled "Cases" and "Recently Viewed Cases". It shows a list of cases with columns for Case Number, Contact Name, Subject, Status, Priority, Date/Time Opened, and Case Owner Alias. A red box labeled "3" highlights the "Contact Records" and "Recently Viewed Contact Records" section. To the right of these sections is a red box labeled "4" titled "Links To Training" containing a "CPPA Resource" link.

| Case Number | Contact Name | Subject  | Status    | Priority | Date/Time Opened | Case Owner Alias |
|-------------|--------------|----------|-----------|----------|------------------|------------------|
| 1           | 00200762     | John Doe | Test test | Medium   | 2/3/2025 4:45 PM |                  |

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

- 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

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The screenshot shows the 'Recently Viewed Cases' section of the MyNAVY HR interface. The table has columns for Case Number, Contact Name, Subject, Status, Priority, and Date/Time. Annotations include: 1. A red box around the 'Case Number' sorting arrow. 2. Red boxes around the 'Subject' and 'Status' drop-down menus. 3. A red box around the refresh icon in the top right corner of the table.

|   | Case Number | Contact Name | Subject    | Status | Pri... | Date/T...     | C |
|---|-------------|--------------|------------|--------|--------|---------------|---|
| 1 | 00215852    |              | N000221... | New    | Medium | 9/22/2020 ... | M |
| 2 | 00313558    |              | AN ...     | 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

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A screenshot of the MyNAVYHR web application 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 a grid icon, the text "MNCC", and a "Home" button. To the right of "Home" is a dropdown menu currently showing "Case" with a red rectangular box around it. Below the navigation bar, the main content area is titled "Cases" with a pink briefcase icon. Underneath is the heading "Recently Viewed Cases". To the right of this heading are three buttons: "New" (highlighted with a red box), "Change Owner", and "Printable View". Below these buttons is another search bar labeled "Search this list...". At the bottom of the screenshot 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, Test, Assigned, Medium, 2/3/2025 4:45 PM, and pfigu.

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

# Creating a case (cont.)

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A screenshot of 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 a "Cases" dropdown menu. The "New Case" option is selected in the dropdown. The main content area is titled "New Case" and contains four radio button options, each with a description. The first option, "PersPay Case", is selected. The entire "New Case" form area is highlighted with a red rectangular border.

**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.)

Unclassified



\* 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.)

Unclassified



\* Subject  
[Redacted]

\* Description  
[Redacted]

Case Information

Case Number

\* Request Type  
--None--  
[View all dependencies](#)

Date Submitted

Problem Code  
--None--  
[View all dependencies](#)

\* Effective Date  
[Redacted]

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.*

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*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.)

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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

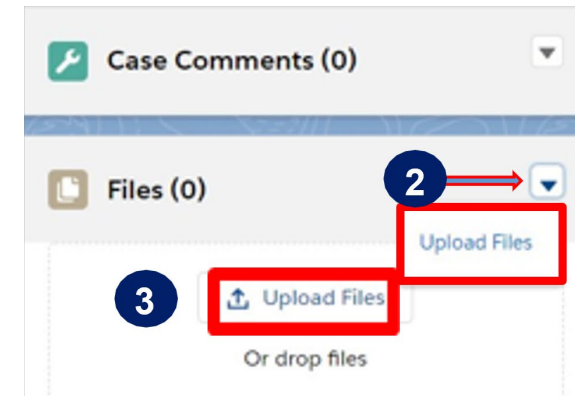
Unclassified



The screenshot shows the "Pers-Pay Service Center" interface. At the top, there's a navigation bar with "Home" and a case number "00200762". Below this, a "Cases" section titled "Recently Viewed" shows a list of 30 items. The table has columns for Case Number, Subject, Status, Date/Time Opened, and Case Owner Alias. The first case, with Case Number "00200102", is highlighted with a red box and a blue circle with the number "1".

|   | 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

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The screenshot shows the MyNAVY HR system interface. At the top, there's a header with the "AMERICA'S NAVY" logo, "MNCC", and a search bar. Below the header, the "Cases" section is active, showing a "Recently Viewed" list. A table lists cases with columns for Case Number, Subject, and Status. A red circle with the number "1" highlights the "Case Number" column header. To the right, a sidebar shows details for the selected case, including "Case Comments (0)", "Files (1)", and "Case Team (1)". A red box with the number "2" highlights the "Test test test" file entry in the "Files" section. Below the sidebar, a mobile app interface is shown with a red box and the number "3" highlighting the "Download" button.

|   | Case Number ↑ 1 | Subject ↑                                | Status    |
|---|-----------------|------------------------------------------|-----------|
| 1 | 00200102        | <a href="#">smoketest1</a>               | Submitted |
| 2 | 00200110        | <a href="#">AN test Approval Process</a> | Closed-C  |

Case Comments (0)

Files (1)

Test test test  
Oct 18, 2020 • 12KB • docx

Case Team (1)

Download

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

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

This screenshot shows the 'Details' tab of a case titled 'TEST TEST'. The 'Internal Comments' section is highlighted with a red box, and a pencil icon next to it is also highlighted with a red box and labeled with a blue circle containing the number '2'. Other sections visible include 'Case Status Comment', 'Subject' (TEST TEST), 'Description' (Submitting a test due to being first time user.), and 'Case Information' with fields for Case Number (01252559), Request Type (Activity Gains), Case Origin, Problem Code, and Receipts.This screenshot shows the 'Internal Comments' form within the 'Details' tab. A red box highlights the text area where a comment can be entered. The text inside the box reads: "Internal comments are NOT visible to the customer. All comments must be clear and professional." A blue circle with the number '3' is placed over the top-left corner of the red box. Below the text area are fields for 'Subject' (TEST TEST) and 'Description' (Submitting a test due to being first time user.). At the bottom, there are 'Cancel' and 'Save' buttons.

- 3 Add comments then click **Save**

# Feed



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A screenshot of the Mynavy HR system interface, specifically the 'Feed' tab. The interface has three tabs at the top: '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'. A blue circle with the number '2' is placed over the 'Email' option. Below this menu is a text input field with the placeholder text 'Share an update...'. A blue circle with the number '1' is placed over this input field. To the right of the input field is a blue 'Share' button. Below the input field is a section titled 'Most Recent Activity' with a dropdown arrow. It shows a recent activity entry from a user with a profile picture, with the text 'To: Internal' and 'Please attach KSD.'. Below this entry is a 'Comment' button. To the right of the activity entry 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

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The screenshot shows the 'My Cases' interface. At the top, it says 'Cases My Cases' with a filter icon and a refresh icon. Below this, it says '50+ Items • Sorted by Date/Time Opened • Filtered by My cases • Updated a few seconds ago'. The main table has 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. To the right of 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, a user of NAVY CPPAUser-1, and original and new values. A 'View All' link is at the bottom of 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



Unclassified

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

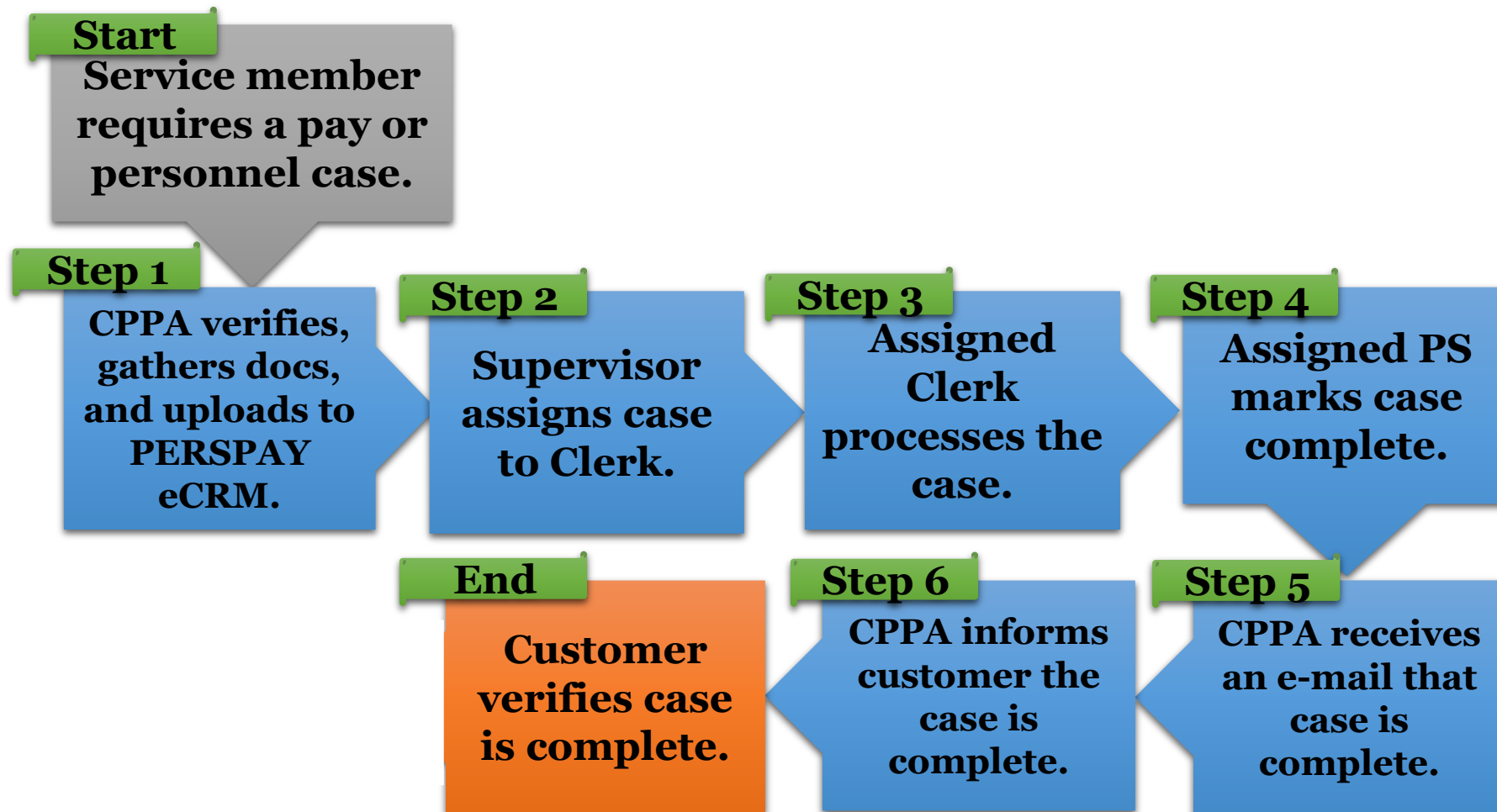
CPPAs are encouraged to familiarize themselves with dashboard functionality to support command leadership in providing case information and additional case reports, as needed.

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 SOP

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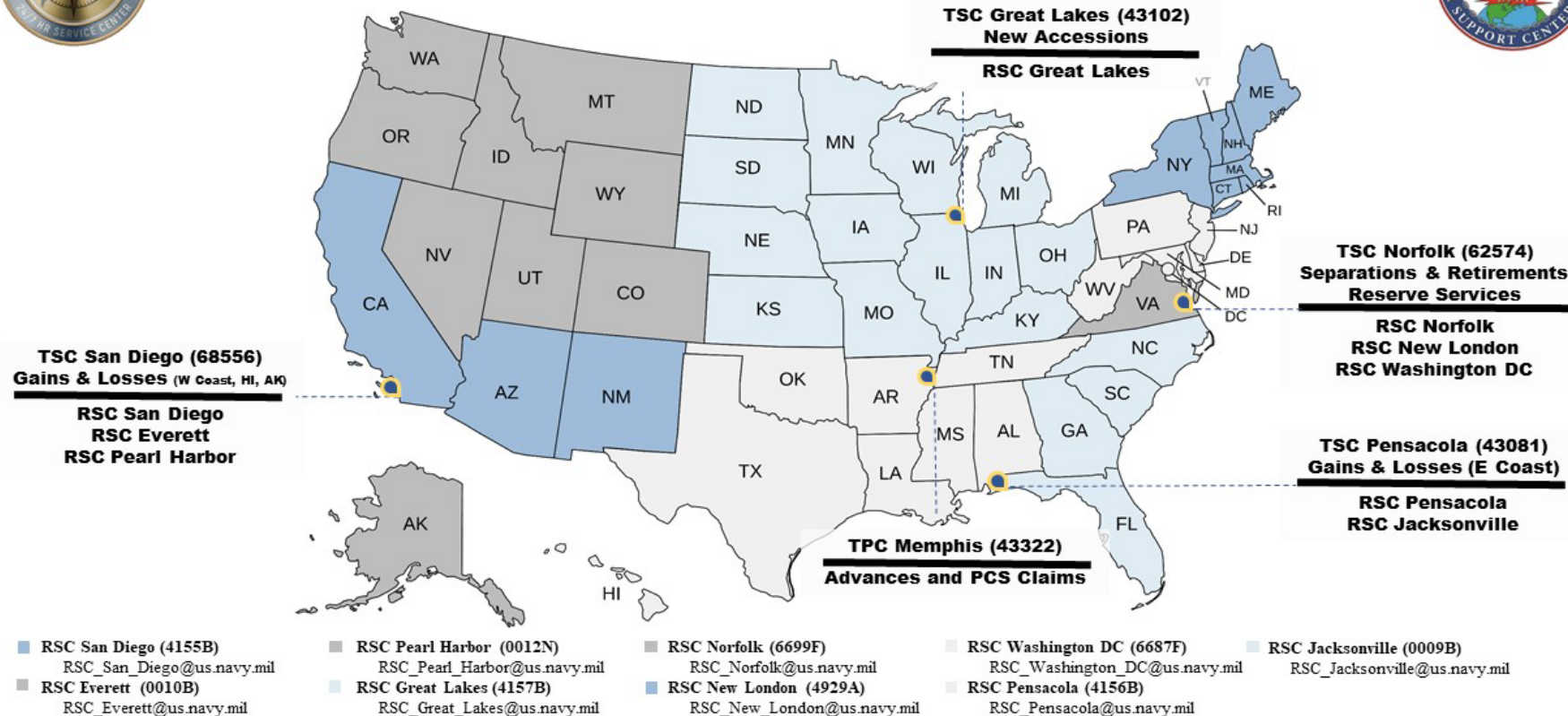


# Transaction Service Center and Regional Support Center Locations

Unclassified



## 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)

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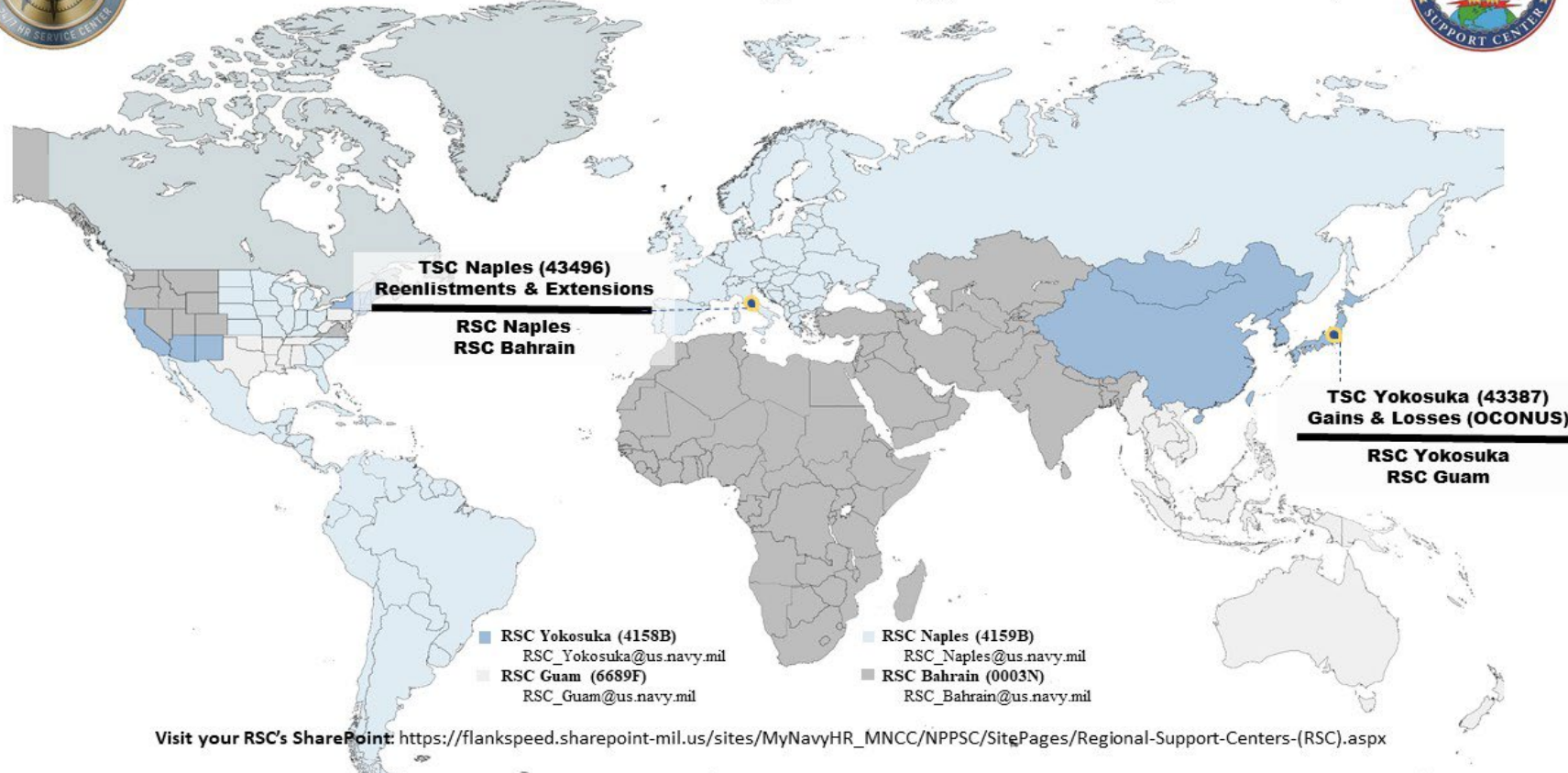
# Transaction Service Center and Regional Support Center Locations OCONUS



Unclassified



## 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)

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# PII on PERSPAY eCRM



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- 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



Unclassified

- 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@us.navy.mil*

## **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.

## 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.



### **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.



## **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.

## 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.



## 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.

# Summary and Review



Unclassified

In this lesson we covered:

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



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# Questions?

# Conclusion



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Thanks for your participation in today's  
**PERSPAY eCRM (BASIC)** training!

For Qualtrics this is lesson #**510**  
Scan QR code for attendance!

[https://usnavy.gov1.qualtrics.com/jfe/form/SV\\_0TgIQYZg67NX9pY](https://usnavy.gov1.qualtrics.com/jfe/form/SV_0TgIQYZg67NX9pY)