Personnel and Pay enterprise Customer Relationship Management (PERSPAY eCRM)

- Instructor Introduction
- Administrative Notes

Revision: May2026

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:

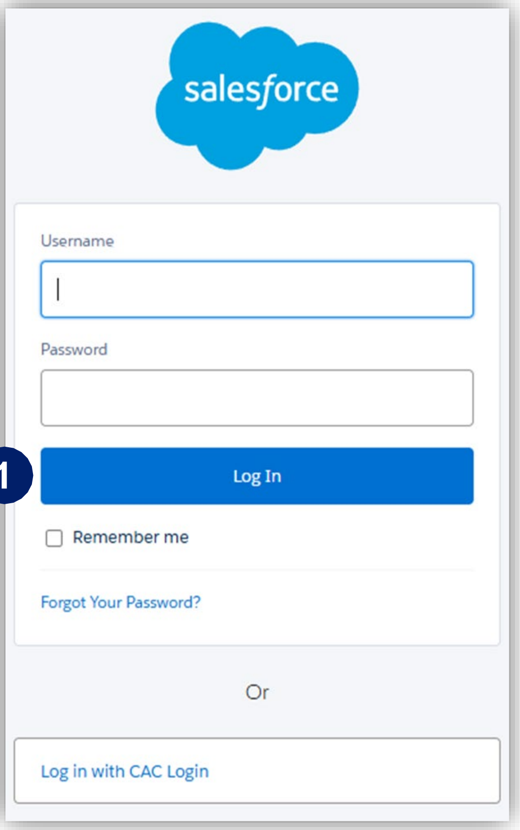
- PERSPAY eCRM Logon
- Basic familiarization
- Creating a case
- Uploading & viewing documents, comments, and history
- Personally Identifiable Information (PII)
- FAQs

Log In

Unclassified

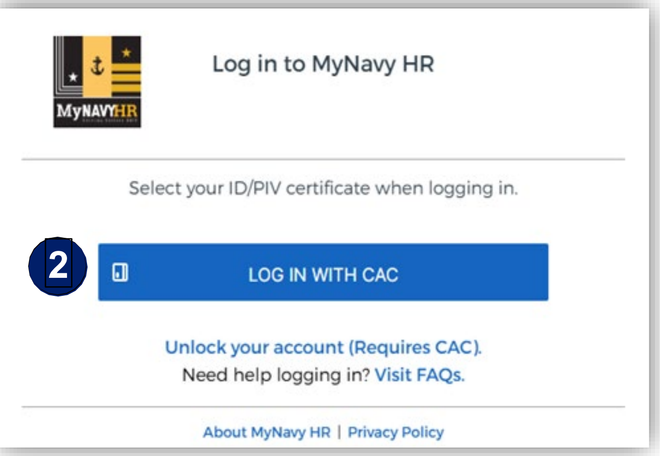
Access eCRM using: https://navynpc.my.salesforce.mil

1



Click CAC Login

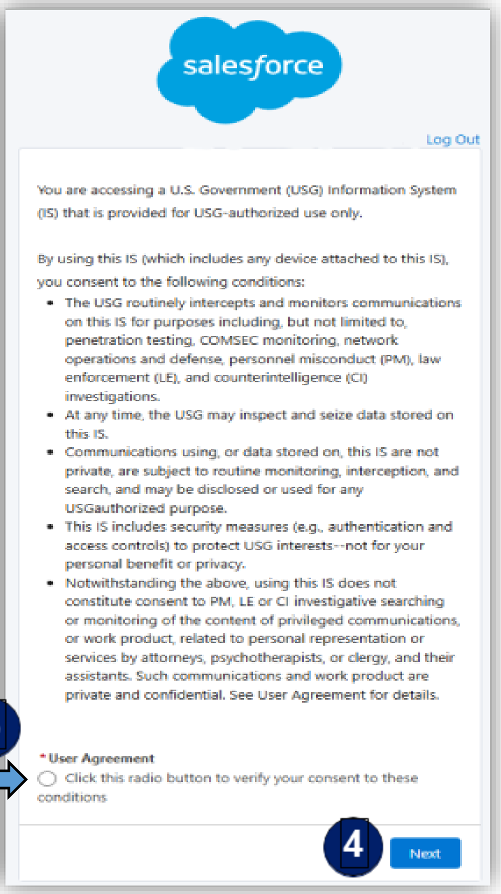
2



3

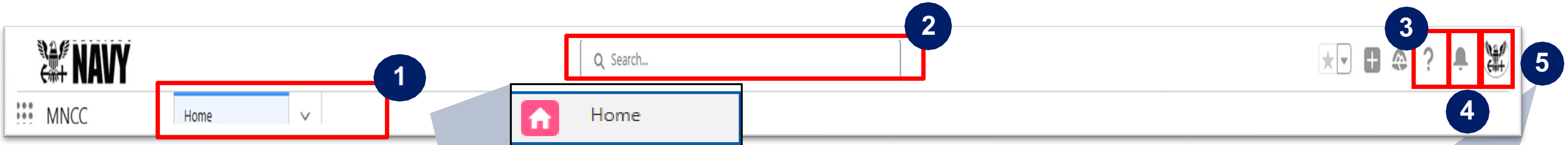
Click Radio Button

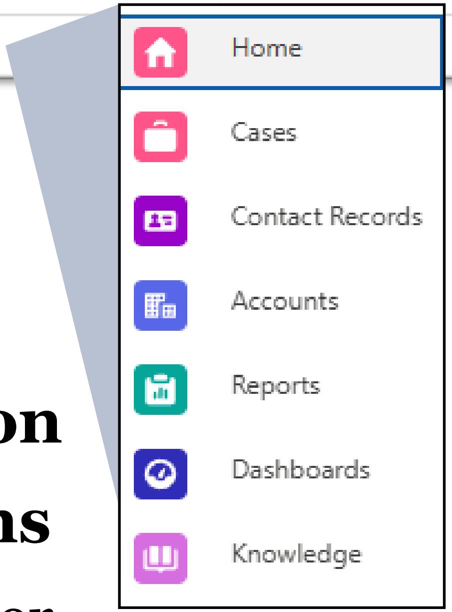
4

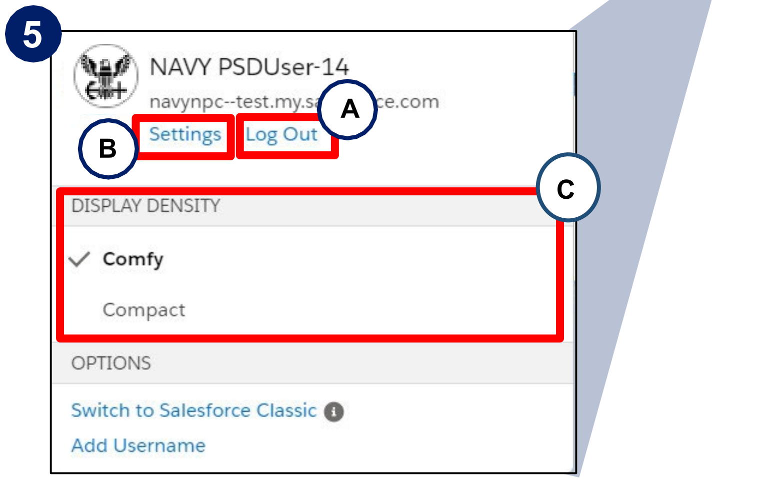


Click Next

Navigating PERSPAY eCRM







1 **Navigation Tab**

2 **Search**

3 **? - Help Function**

4 **- Notifications**

5 **- Avatar:** User customizations

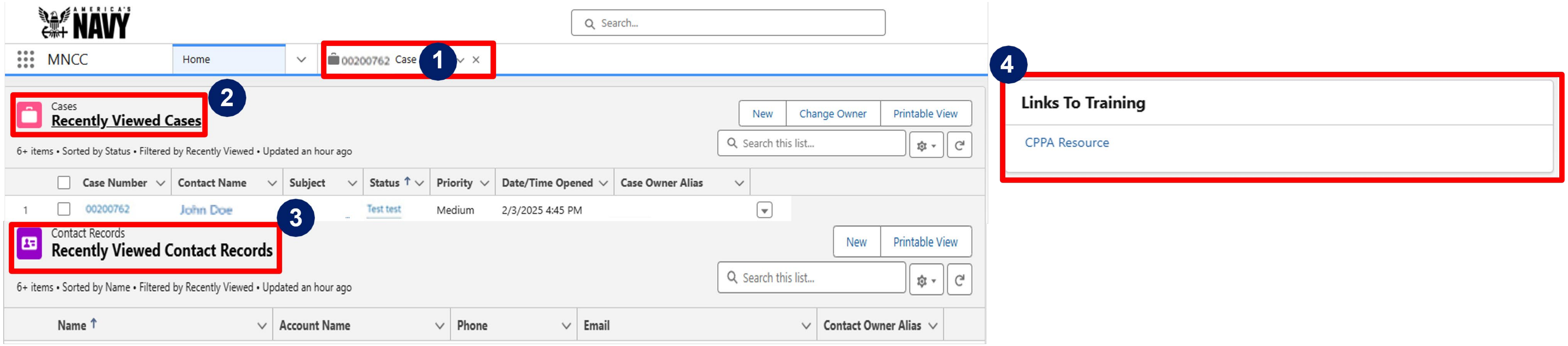
A **Log Out**

B **Settings:** Personalize

C **Display Density:** How much info is shown

Home Menu

Unclassified



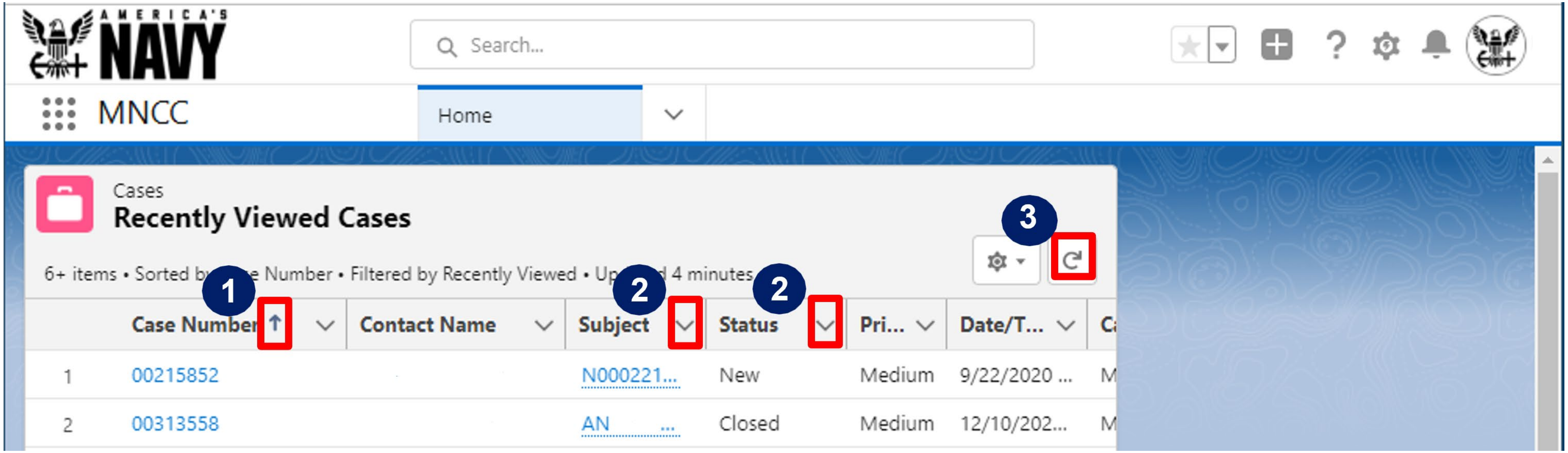
1 ***Case Tabs:*** Your open cases appear as tabs

2 ***Recently Viewed Cases***

3 ***Recently Viewed Contacts***

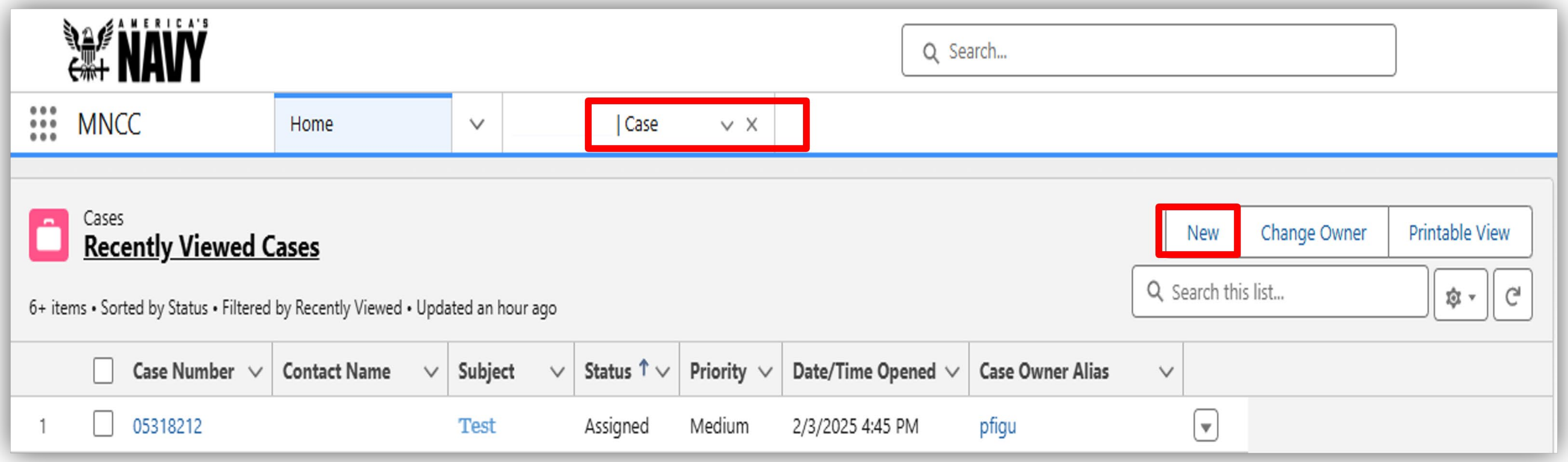
4 ***Link to CPPA Resources in MyNavyHR***

Sorting Information



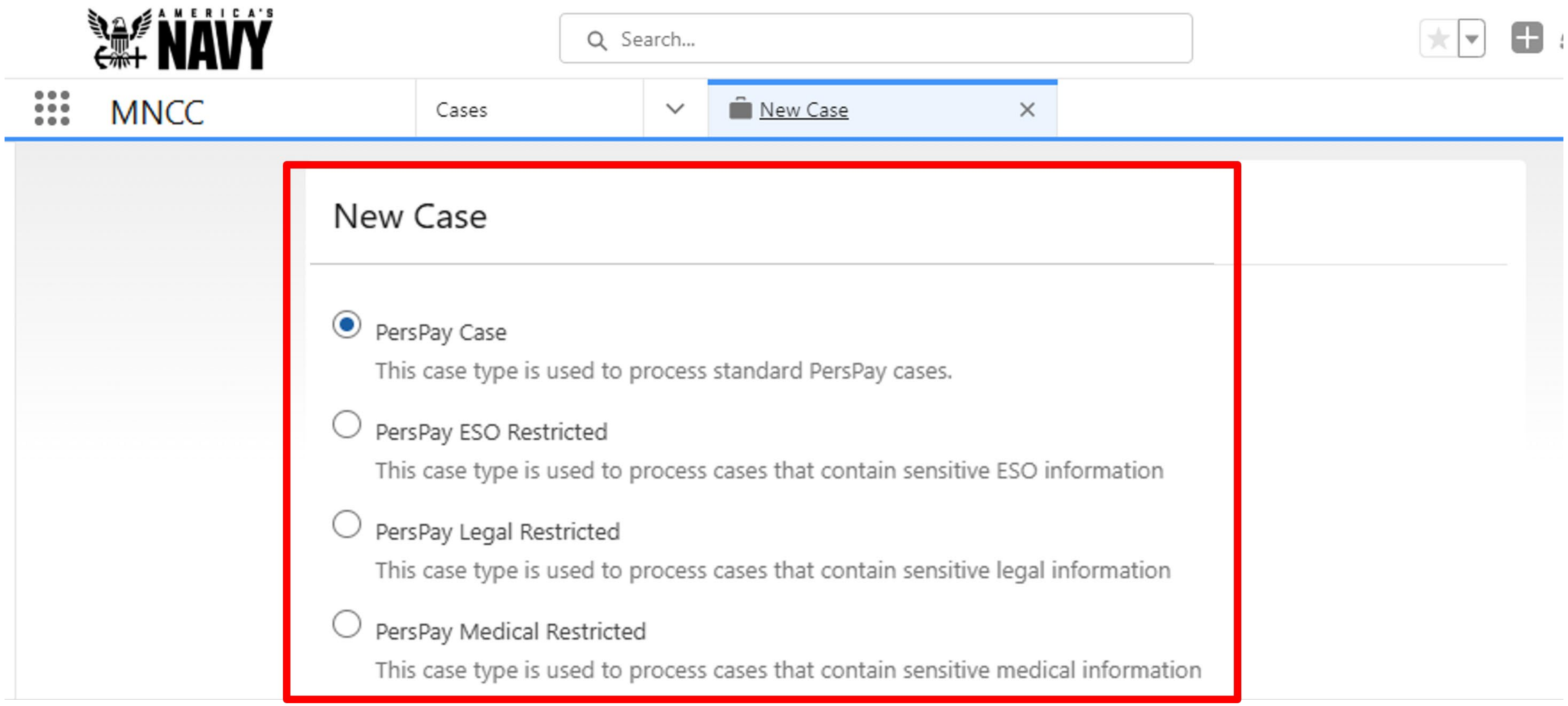
1. ***Sorting Arrow:*** Change sorting for the list
2. ***Drop-down:*** Change the view of content
3. ***Refresh:*** Refreshes selected list

Creating a case



1. Select **“Cases”** from the **Navigation Tab**
2. Select **”New”**

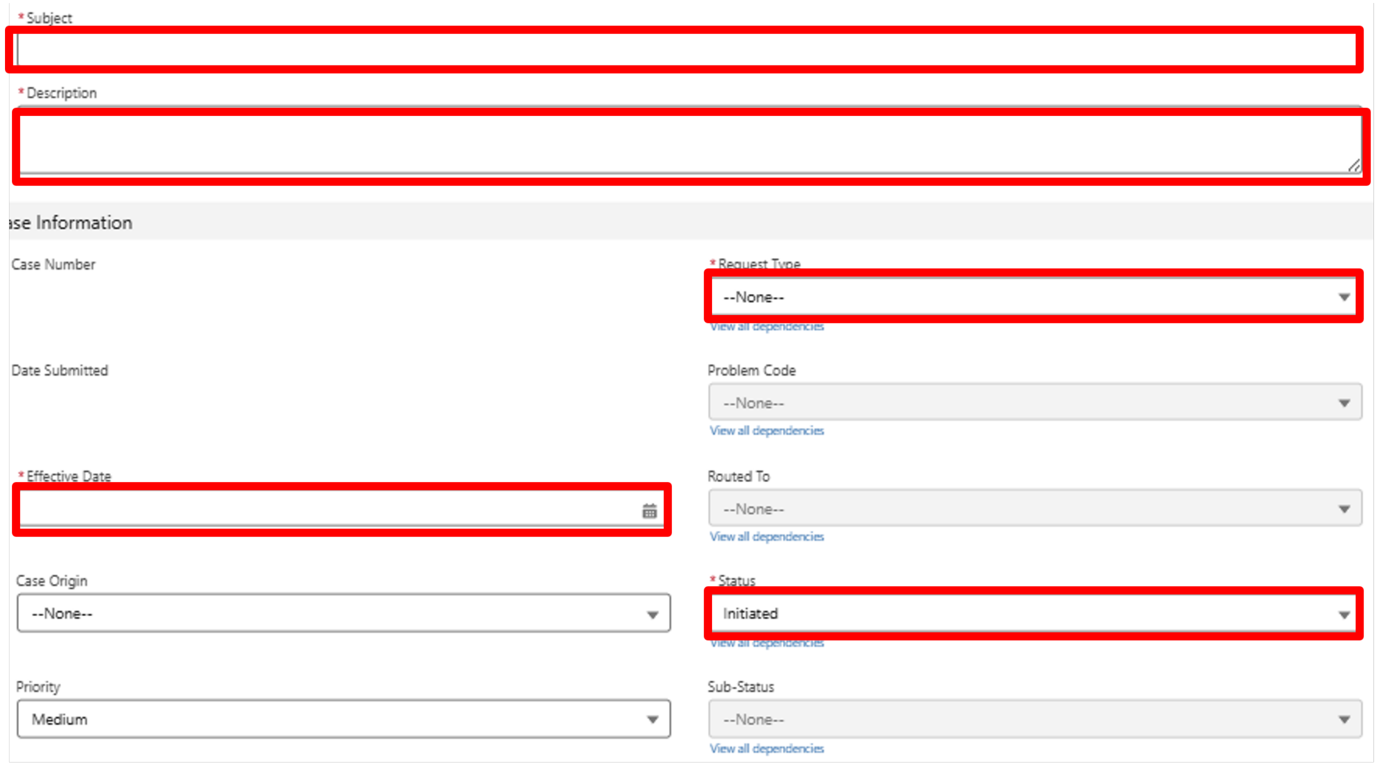
Creating a case *(cont.)*



1. Select **“Type of Case”**
2. Select **“Next”**

Creating a case *(cont.)*

Unclassified



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

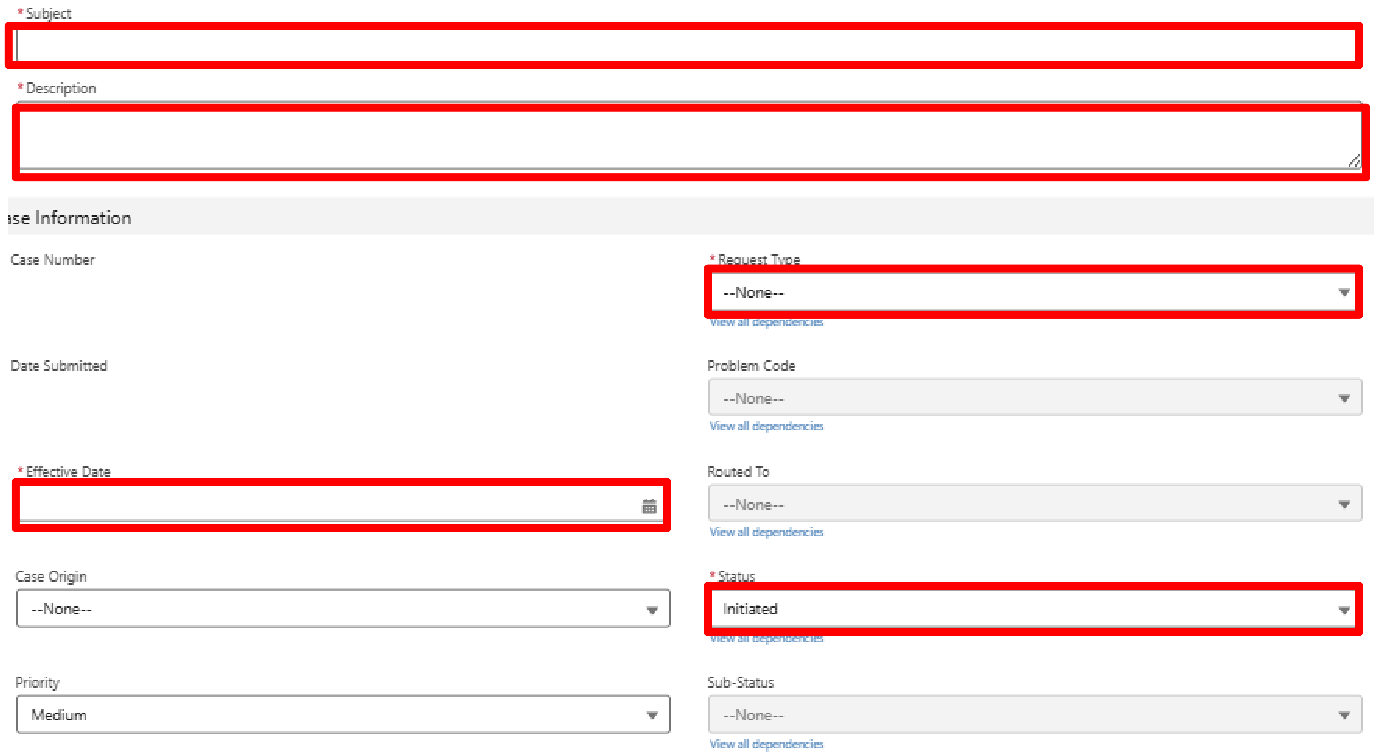
See eCRM Library in CPPA Resources for Routing Guidance

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.)*



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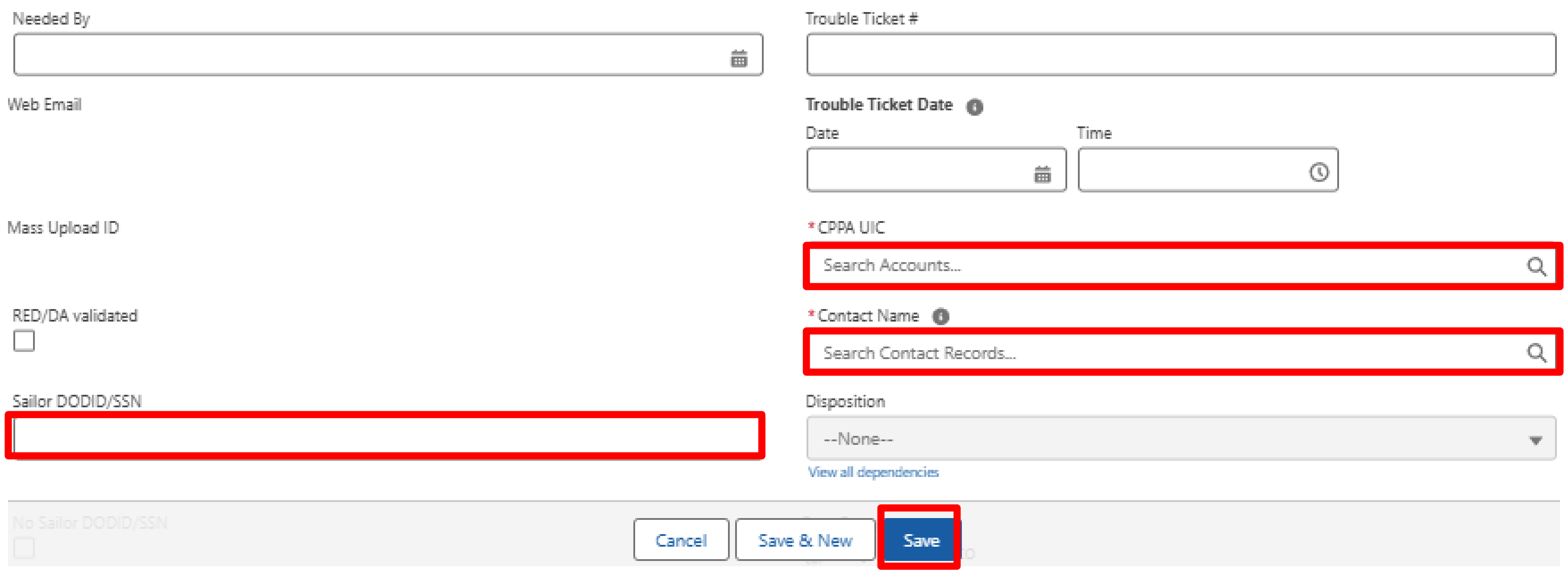
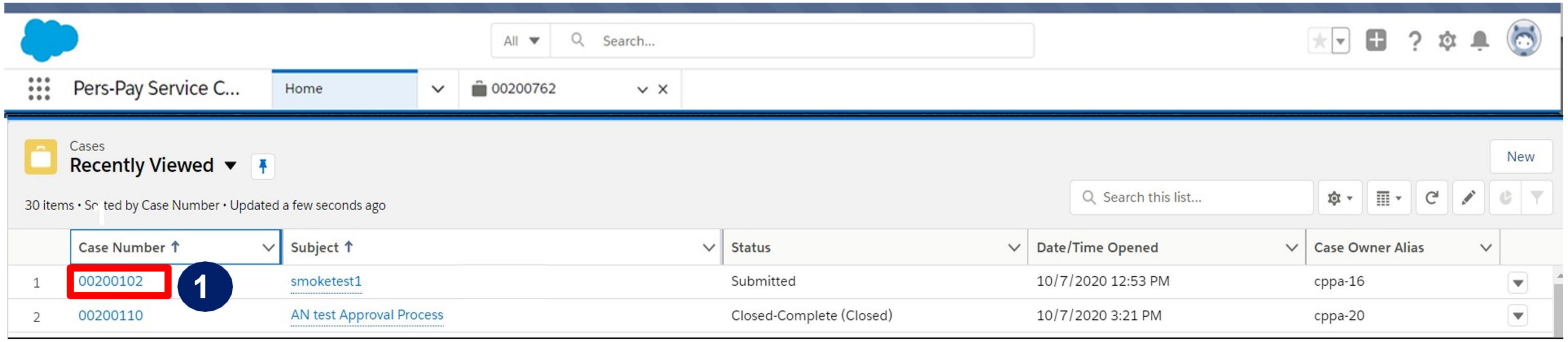


4 Make entries for: **CPPA UIC, Contact Name (Sailor's name, not CPPA), and Sailor's DODID/SSN**

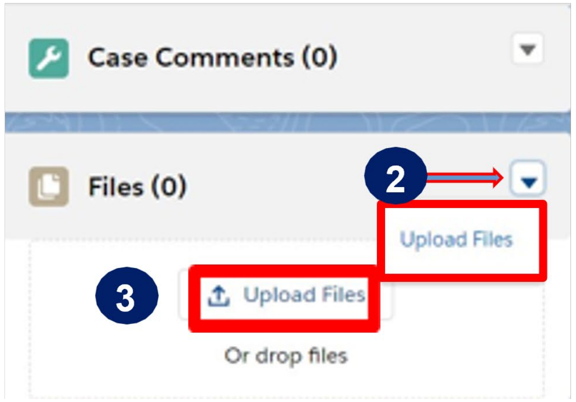
5 Verify all information is correct. Click **"Save"**

Uploading Documents

Unclassified



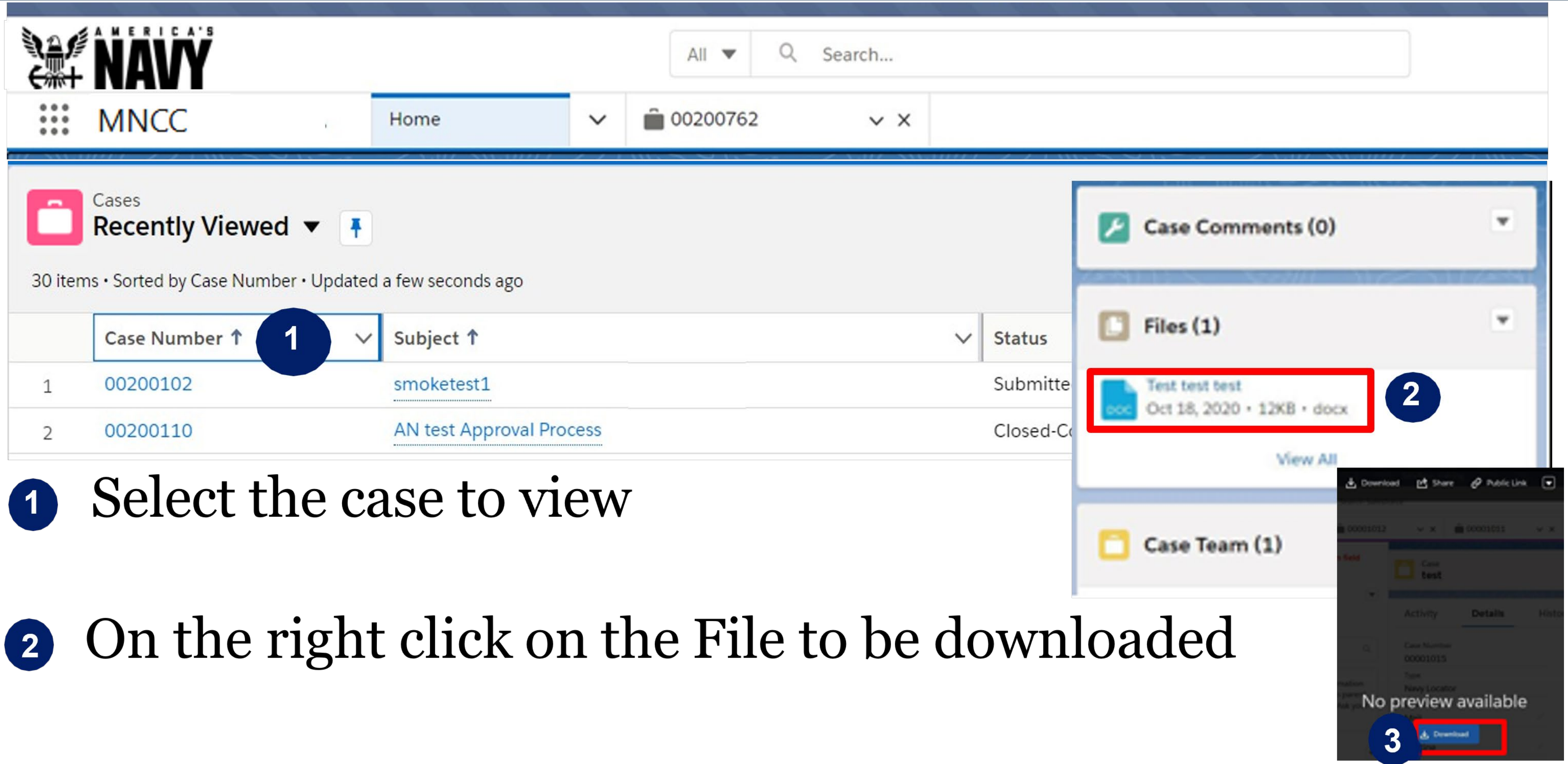
1. Select the case to attach documents
2. Click arrow -- select **Upload Files**
3. Upload Files or Drag and Drop



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

Unclassified



1. Select the case to view

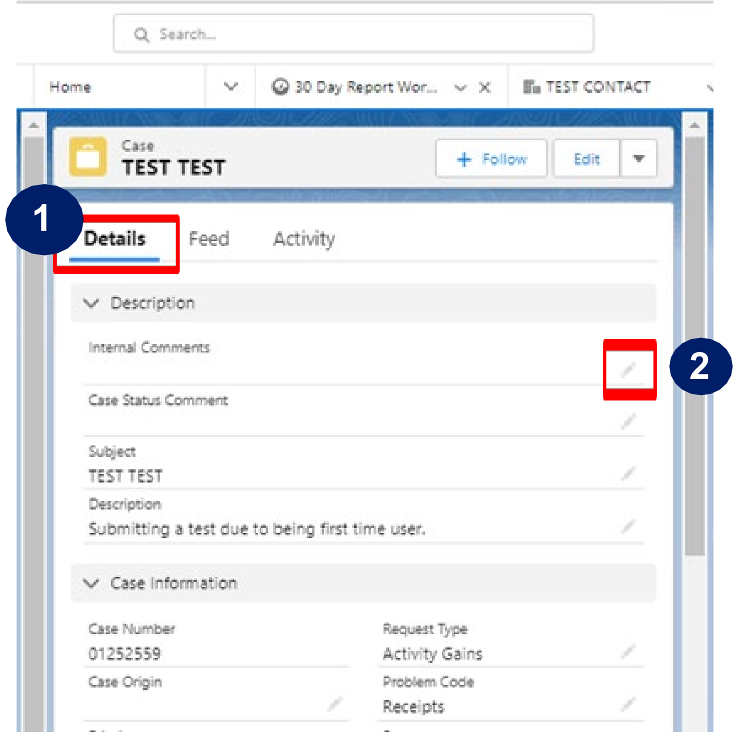
2. On the right click on the File to be downloaded

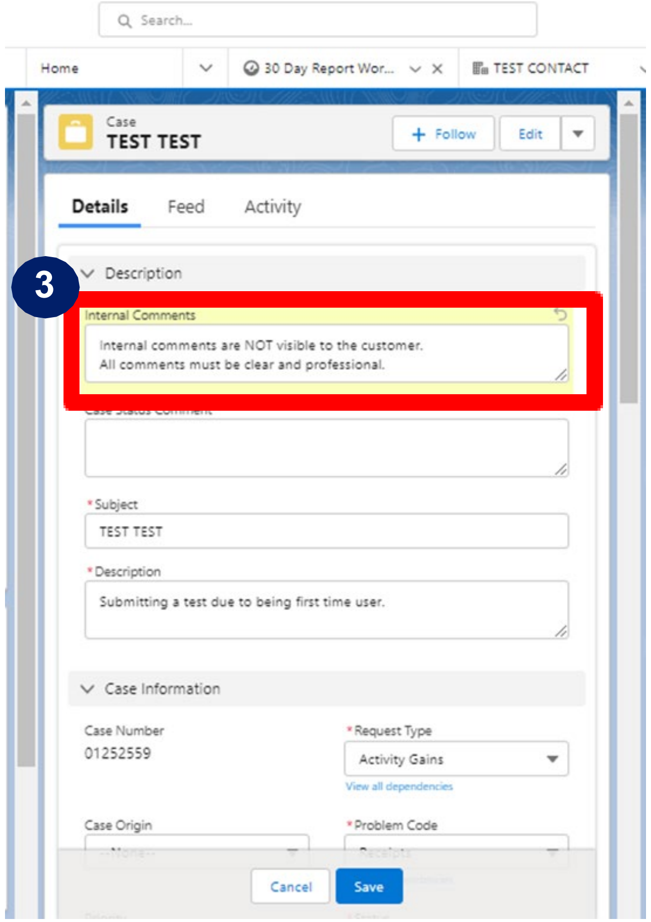
3. Click ***Download*** and select ***Save As*** or ***Open***

Internal Comments

1 Find the **Details** tab

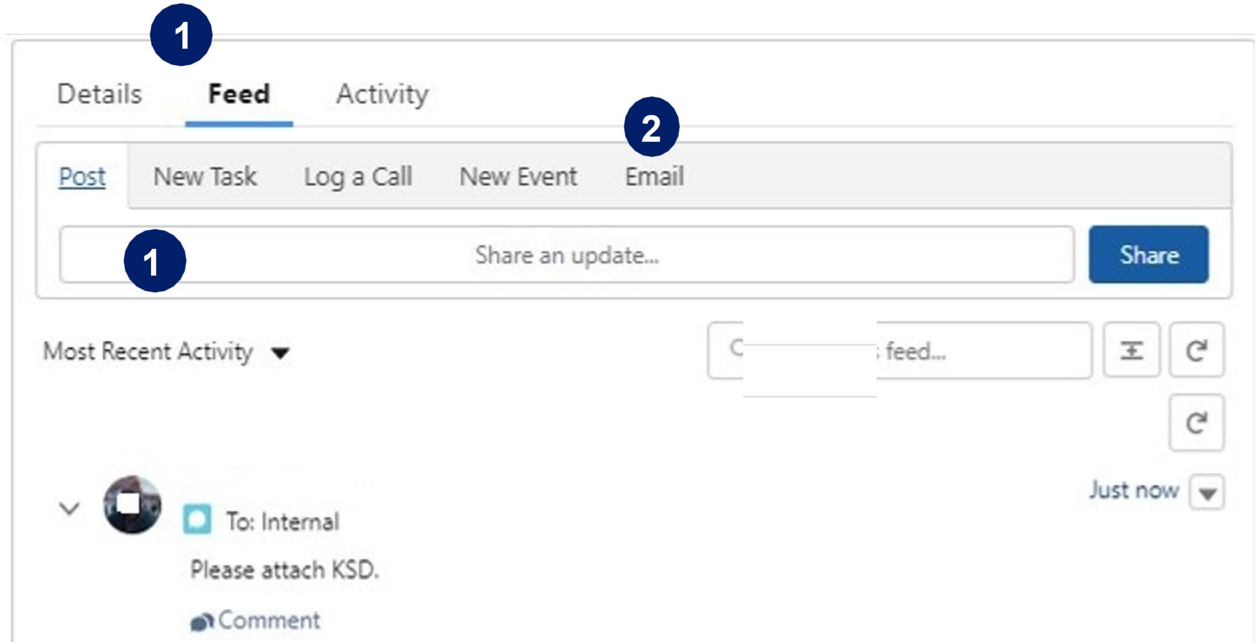
2 Select the **Internal Comments** pencil





3 Add comments then click **Save**

Feed

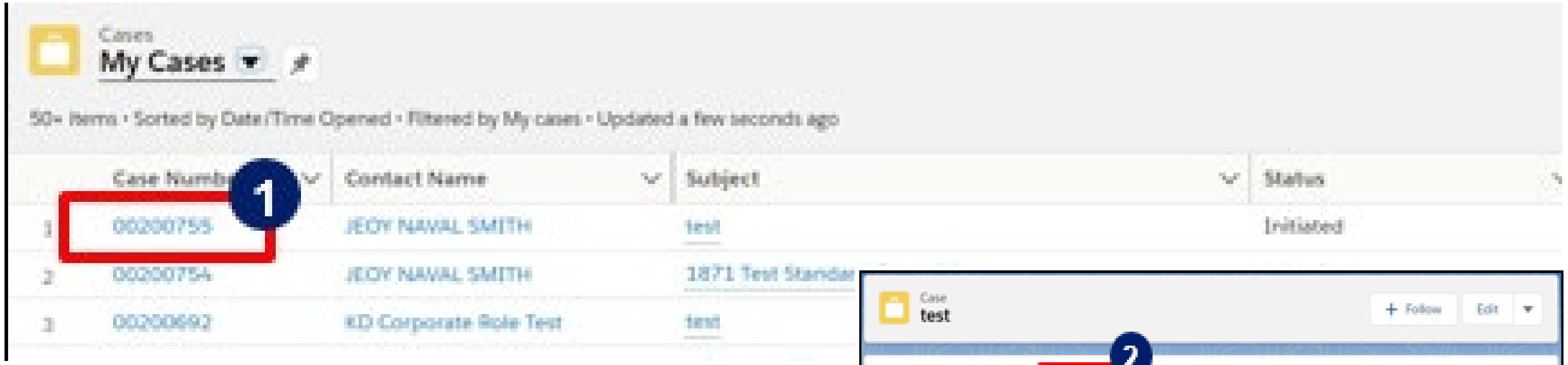


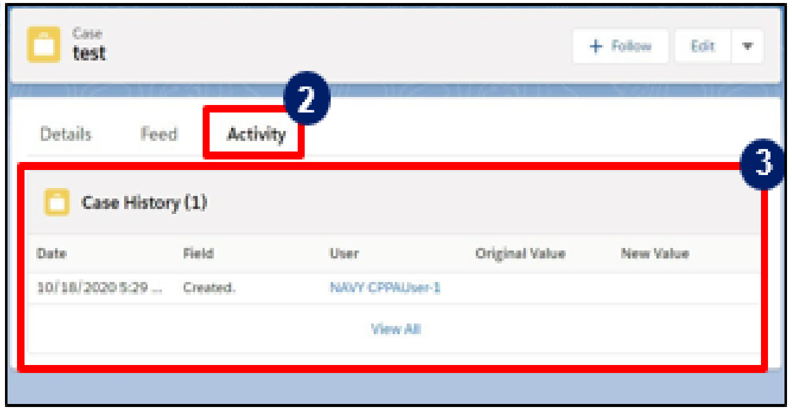
1. Select the "**Feed**" tab, this is where most of the "conversation" or "feedback" will be located in regard to the case.

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 for of a MNCC email.

View Case History

Unclassified





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 SOP

Unclassified

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.

Step 5
CPPA receives an e-mail that case is complete.

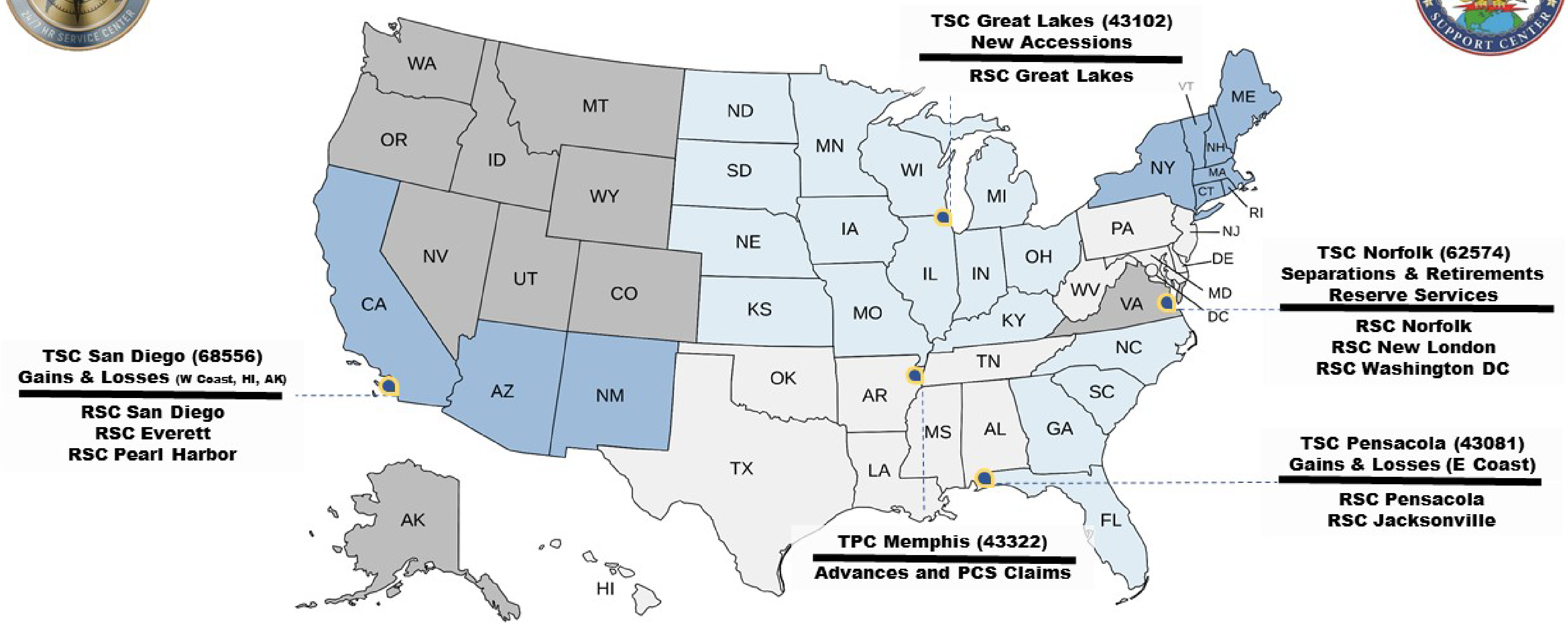
Step 6
CPPA informs customer the case is complete.

End
Customer verifies case is complete.

Transaction Service Center and Regional Support Center Locations

Unclassified

Transaction Service Centers & Regional Support Centers (CONUS)

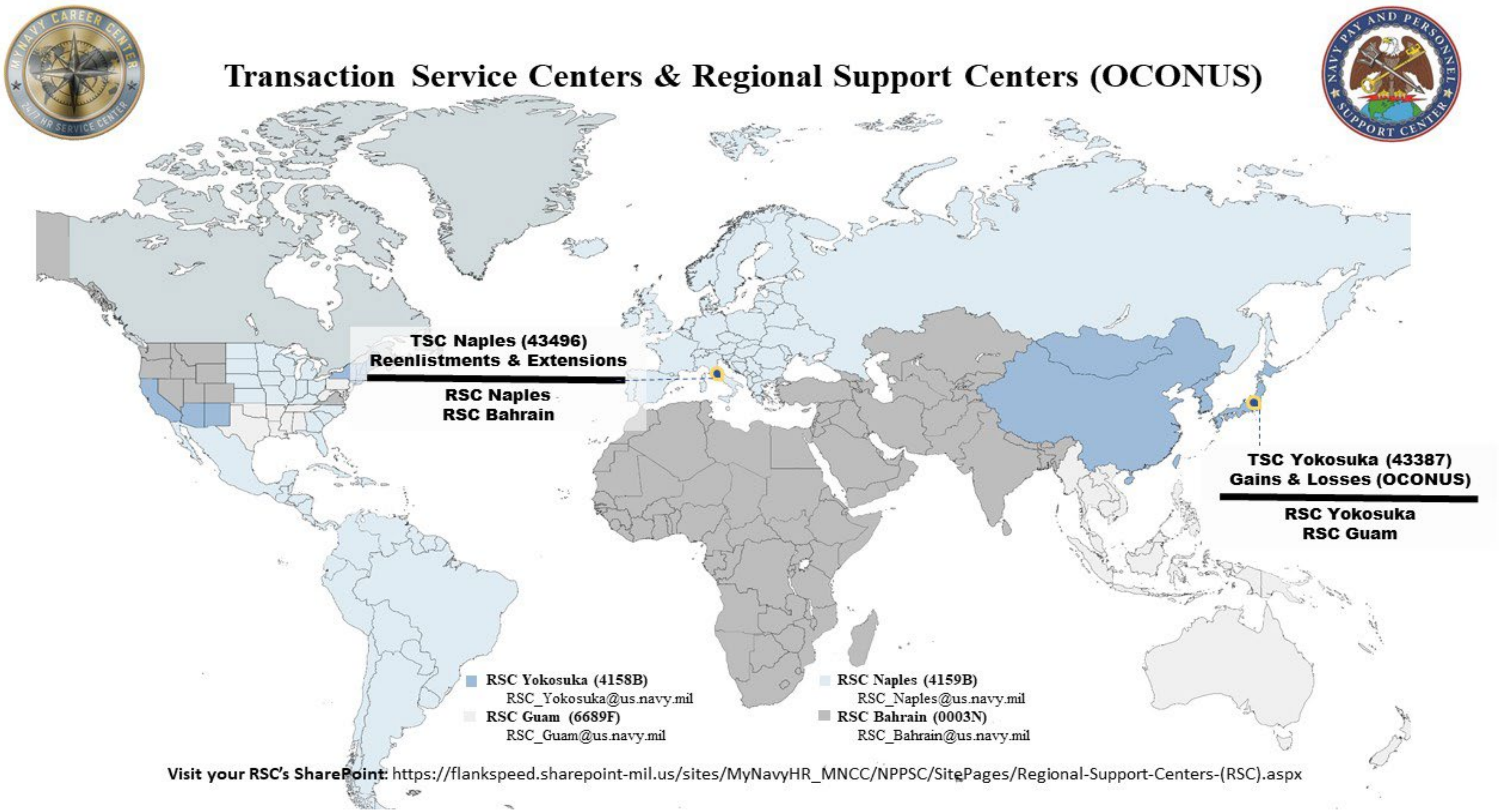


- RSC San Diego (4155B) RSC_San_Diego@us.navy.mil
- RSC Everett (0010B) RSC_Everett@us.navy.mil
- RSC Pearl Harbor (0012N) RSC_Pearl_Harbor@us.navy.mil
- RSC Great Lakes (4157B) RSC_Great_Lakes@us.navy.mil
- RSC Norfolk (6699F) RSC_Norfolk@us.navy.mil
- RSC New London (4929A) RSC_New_London@us.navy.mil
- RSC Washington DC (6687F) RSC_Washington_DC@us.navy.mil
- RSC Pensacola (4156B) RSC_Pensacola@us.navy.mil
- RSC Jacksonville (0009B) RSC_Jacksonville@us.navy.mil

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

Transaction Service Center and Regional Support Center Locations OCONUS

Unclassified



PII on PERSPAY eCRM

- eCRM can store and transfer PII but its email tool is <u>**NOT**</u> cleared to send PII material
- **NEVER** put PII into the case ‘Subject’, ‘Description’, or any field automatically included in eCRM emails
- <u>Use NMCI Outlook</u> 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*

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.

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

Questions?

Conclusion

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