eCRM MyNavy Tracker

CPPA Training

PCS – Pre Loss Actions

- Instructor Introduction
- Administrative Notes

Revision: May2026

Disclaimer

Unclassified

This Lesson is Unclassified

These slides are for "TRAINING PURPOSES ONLY".

Objectives

- To provide CPPAs with a clear understanding of the procedures for utilizing the eCRM MyNavy Tracker.
- Ensure accurate and timely processing of Navy pay and personnel transactions.
- Establish proficiency in tracking and resolving Sailor inquiries using the eCRM system.

Verify Pre-Travel Questionnaire Completion

Log in to eCRM

Step 1: In the Cases tab, type PCS in the search field; then select PCS Parent Case List View.

Step 2: Select a Case Number hyperlink of a Parent Case to open it.

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.

Add Self as CPPA to PCS Entitlement Case

Step 1: In the Parent Case view, scroll to the Case tile and select View Case Hierarchy.

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

Step 2: Select the PCS Entitlement Child Case Number hyperlink.

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.

Step 3: Scroll down to the Related Users tile.

Add Self as CPPA to PCS Entitlement Case (Cont.)

Step 4: Select the Edit icon in the CPPA field.

Step 5: Type your name in the CPPA field, select your Name from the list of options; then select Save.

Note: Save changes to the CPPA field before making any additional edits to the Child Case.

Step 6: When finished, select the Parent Case Sub-tab.

Note: When working a PCS case, you are notified on the case details page of any pending tasks that were not completed prior to submitting the PCS case.

Add Loss Approving Official Information

Step 1: In the Parent Case View, scroll down to the Activity Loss Information tile.

Step 2: Select the Edit icon in the Loss Approving Official Name field.

Step 3: Enter the Loss Approving Official's Name, then enter their Email. Type the Loss Approving Official's Name and Email in the fields.

Step 4: Select the Verified Loss AO Name checkbox; then select Save.

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.

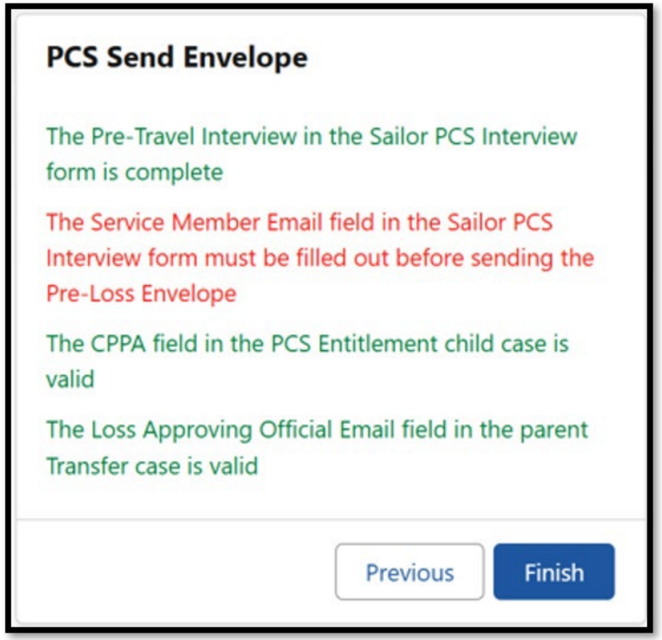
3. As the CPPA, add yourself to the PCS Entitlement Child Case.

4. Add the Loss Approving Official (AO) name and email to the Parent Case.

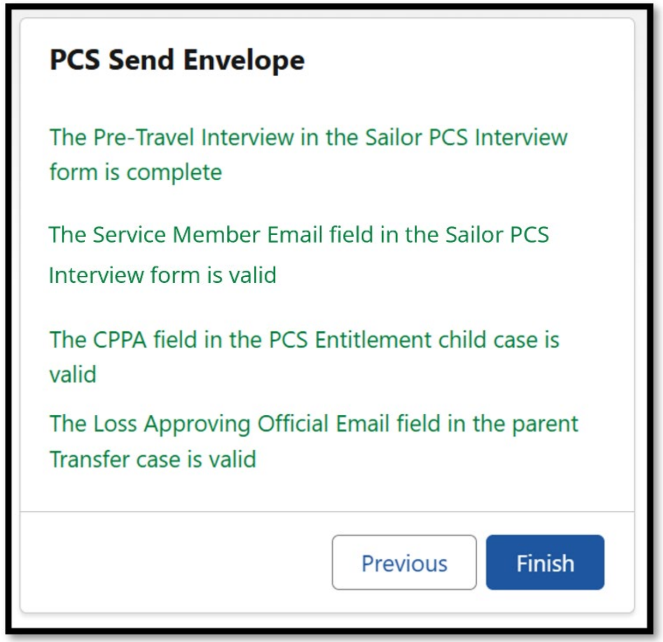
Prepare to Send Pre Loss Envelope (Cont.)

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 / Incomplete Info



Valid and Complete Info



Send Pre Loss Envelope

Step 1: In the Parent Case View, scroll down to the PCS Send Envelope tile.

Step 2: Select Next on the PCS Send Envelope tile.

Step 3: Select the Pre Loss Envelope radio button; then select Next.

Step 4: Review the PCS Send Envelope Checklist and select Finish.

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

View DocuSign Envelope Status

Step 1: In the Parent Case view, select the **Activity** Tab.

Step 2: Scroll down to the **DocuSign Envelope Status** tile.

Step 3: Select the **DocuSign Envelope** arrow to expand and view the details.

Note: The DocuSign Envelope Activity displays in a collapsed view.

Step 4: Each envelope displays routing details. View the routing details; then select **Show More** to expand and view status details.

View DocuSign Envelope Status (Cont.)

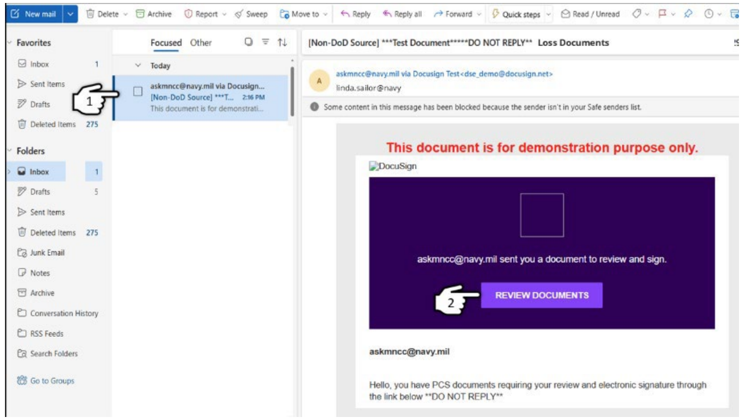
Step 5: Review the status and routing details, then select **Show Less** to collapse the view.

Step 6: Select **View All** to open the DocuSign sub-tab and view all activity.

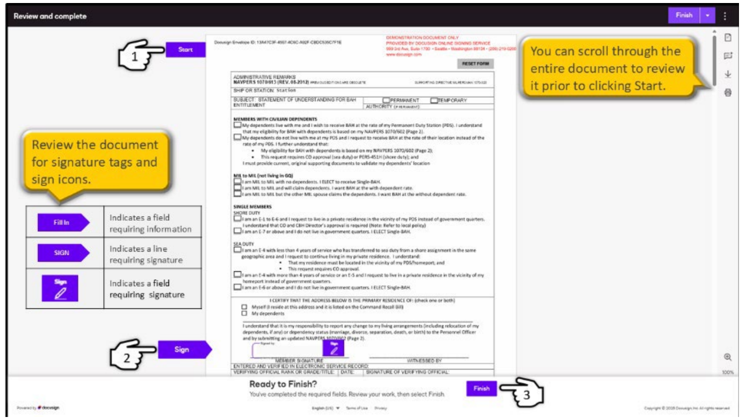
Step 7: Review the date Sent and Status of each Envelope, as needed. When finished, select **Close (X)** to close the sub-tab.

Review and Sign Docusign Documents

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



Step 1: Open the Docusign Email, then select Review Documents.



Step 2: Select Start to review the document for accuracy and enter required information. When finished, select Sign and Finish.

View I-STOP Information

The "I-Stop In Progress" status is added to the PCS Case tracker so you can 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: Select an **Intermediate Duty Stop** link.
Note: The number of the I-stop corresponds to the Sailors orders. You should review all sets of orders prior to commencing work on the Sailor's cases.

Step 3: Review the I-STOP information.

View I-STOP Information (Cont.2)

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

Step 4: In the Parent Case view, scroll down and select the **View Case Hierarchy** button.

Step 5: On the Case Hierarchy page, select a **Case Number** hyperlink.

Step 6: Scroll down t o review the I-STOP information.

View I-STOP Information (Cont.3)

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

Step 7: In the Parent Case view, scroll down to the **Cases for Parent Contact** Tile.

Step 8: Select a **Case Number** or **Case Link**.
Note: I-Stop cases are initiated for both Activity Gain and Activity Loss.

Step 9: Review the I-STOP information.

View I-STOP Information (Cont.4)

A new field called the "Intermediate Duty Assignment UICs" is 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 10: In the Parent Case view, scroll to the **Intermediate Duty Assignment UIC(s)** field in the PCS Orders Information tile.

Step 11: Review the I-STOP information.
Note: For details regarding these cases, refer to their respective Activity Loss and Activity Gain child cases.

Key Takeaways

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- The eCRM MyNavy Tracker is essential for transparent and efficient personnel/pay issue resolution.

- Accurate initial case submission prevents delays and rework.

- CPPAs must consistently monitor their queues and respond promptly to requests for additional information (RFI).

- Clear communication with the Sailor throughout the process is critical.

Best Practices

- **Double-Check Documents**: Ensure all uploaded files are legible, complete, and unencrypted before attaching.
- **Detailed Notes**: Provide clear, concise, and professional comments within the case tracker. Avoid using vague language.
- **Daily Monitoring**: Make it a habit to check your eCRM dashboard at the beginning and end of each shift.
- **Proactive Communication**: Don't wait for the Sailor to ask; provide updates when a case transitions between major stages.

Conclusion

Unclassified

Thanks for your participation in today's
eCRM MyNavy Tracker PCS
Pre Loss Actions
training!

For Qualtrics this is lesson **346**
Scan QR code for attendance!

https://usnavy.gov1.qualtrics.com/jfe/form/SV_0TgIQYZg67NX9pY