



NAVY PAY AND PERSONNEL SUPPORT CENTER OPS ALERT

Ser N3: 014-23

PROCEDURE UPDATE: AGING SALESFORCE CASES IN INITIATED STATUS

Release Date: 12/01/2023

Effective Date: 3 January 2024

BLUF: On 3 January 2024, Navy Pay and Personnel Center (NPPSC) will commence closing eCRM/Salesforce cases in an “**Initiated**” status that appear to be obsolete due to the reasons listed in this Ops Alert. Cases lingering in **Initiated** status (not yet Submitted) can unintentionally and negatively affect Sailor pay when they contain valid work that is not submitted in a timely manner. Action required by Command Pay and Personnel Administrators (CPPA):

- Do not “pre-stage” cases in **Initiated** status, and only create/submit cases when required initial Key Supporting Documents (KSD) are available.
- Immediately review ALL cases in an **Initiated** status and submit the cases for action if the case is still valid or close cases if they are obsolete.

DISCUSSION:

- **Initiated Cases.** NPPSC will begin closing cases meeting the following criteria on 3 January 2024:

- Cases created 180 or more days prior and that have an effective date of 30 or more days prior.
- Cases created by users who no longer have a Salesforce account or who have not logged onto Salesforce in the past 30 days.
- Activity gains created more than 30 days ago with an effective date over 30 days prior for Sailors currently showing in ACC 100 (indicating the Sailor has already been gained via another case).

There are nearly 3,000 Salesforce cases in Initiated status that were created 30 or more days ago, including many cases created over one year ago. These cases largely appear to be abandoned, invalid, or obsolete work. These cases include several hundred cases with a Subject or case comments indicating a test case, a case created in error, an invalid case, or a case that should be closed or deleted. There are also many other cases indicating the subject Sailor is no longer in the Navy. There are also cases with problem codes indicating the case is obsolete and/or completed through a separate Salesforce case.

CPPAs should not “pre-stage” cases within Salesforce. For transactions where the CPPA creates a case but determines a KSD must still be acquired, the CPPA should close the case and create a new case once all initial KSDs are acquired. Cases being closed per this Ops Alert do not include cases in Initiated status with an effective date in the future or in the past 30 days, as this might represent work in progress or short delays in case submission due to issues such as CPPA leave periods, loss of connectivity, etc.

- **Cases Submitted Erroneously.** Additionally, improper case creation practices by some CPPAs is causing some cases to not include a Submission date. CPPAs must initiate and submit eCRM cases per guidance provided in the [CPPA MNCC eCRM User Guide](#). Follow guidance in “creating a case” and “submitting a case to TSC” closely to avoid potential issues. Cases must be first saved in an “Initiated” status; after KSDs are uploaded and when ready to submit, mark case as “Submitted” in the case tracker, and then click “Mark as Current Status.”

- Step 1. Create case and save in Initiated Status (not depicted below).
- Step 2. Mark case as submitted.
- Step 3. Click Mark as Current Status.

The screenshot shows a case tracker interface with a status flow: Initiated → Submitted → CPPA Action Required → Assigned → Supervisor Review → Pending System → Closed → Mark as Current Status. The 'Submitted' and 'Mark as Current Status' buttons are highlighted with red arrows and the number 2 and 3 respectively. Below the flow, there are 'Key Fields' including Request Type (NAVPTO_Transportation), Problem Code (Passenger Reservation Request (PR)), and Routed To (NAVPTO). A 'Guidance for Success' note states: 'Based on Request Type/Problem code selection the case will be routed to the correct queue. Click Mark as Current Status to complete sub...'.

WHAT THIS MEANS TO YOU:

- ✚ CPPAs should immediately review ALL cases in an Initiated status and submit the cases for action if the case is still valid.
- ✚ CPPAs have the capability to close cases in an Initiated status themselves. Do NOT submit a case for action only asking for it to be closed. CPPAs reviewing cases currently in Initiated status that are obsolete should pre-emptively close the case(s) themselves. To close a case in Salesforce, add an appropriate case comment, click on the pencil icon next to “Status”, select “Closed” on the drop down, and click on the “Save” icon.
- ✚ CPPAs should immediately discontinue pre-staging cases in Salesforce.
- ✚ CPPAs must create cases in an Initiated status not Submitted status. Follow guidance provided in the [CPPA MNCC eCRM User Guide](#).
- ✚ OPS ALERTS, PERSPAY SOPs, eCRM Case Routing Guidance and CPPA Resources can be found on the [MyNavy Career Center CPPA Resources Page](#).

***** REGIONAL SUPPORT CENTERS: DISSEMINATE TO COMMANDS AND CPPAS IN YOUR AOR *****

***** PASS THE WORD*****

POC:

NPPSC N3 GLOBAL OPERATIONS

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