NAVY PAY AND PERSONNEL SUPPORT CENTER
OPS ALERT

Ser: 020-24

SYSTEM UPDATE: **ECRM UPDATE - CASE TEAMS FUNCTIONALITY**

Release Date: 7/12/2024 Effective Date: 7/11/24

BLUF: enterprise Customer Relationship Management (eCRM)/Salesforce has be updated to automate the creation of command Case Teams based on a command pay and personnel administrator's (CPPA) unit identification code (UIC). This function will automatically add CPPAs to a case team based on their assigned UIC, and limit the need for CPPAs to be manually added to a case.

DISCUSSION: As part of the eCRM Increment 24.0.0 system update, Case Team functionality was released into Perspay eCRM. This functionality will automatically add CPPA UIC to the Case Team tile when the CPPA initiates a case and inputs the required field labeled "CPPA UIC". UIC Case Teams have been derived from existing CPPA user data in the CPPA Contact Records within eCRM. There are no additional steps to the case initiation process. Commands requiring CPPAs to be added to a UIC Case Team may request assistance from their Regional Support Center (RSC). RSC eCRM Coordinators have the ability to manually update UIC Case Teams (add or remove users). See enclosure (1) of this Ops Alert for more information on this new funcitonality

WHAT THIS MEANS TO YOU:

- **CPPAs:** Are now included and have visability into all cases created for their "assigned" UIC in eCRM. CPPAs needing to be manually added (or removed) to a command case team UIC in eCRM will contact their RSC for support.
- **CPPAs**: Find your Regional Support Center (RSC) contact information on the MyNavy HR CPPA Resources Page > RSC Contacts. Find RSC Training Schedules and additional info the RSC SharePoint Pages.
- OPS ALERTS, PERSPAY SOPs, eCRM Case Routing Guidance and CPPA Resources can be found on the MyNavy HR CPPA Resources Page (navigate to CPPA Resources > eCRM Library).

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

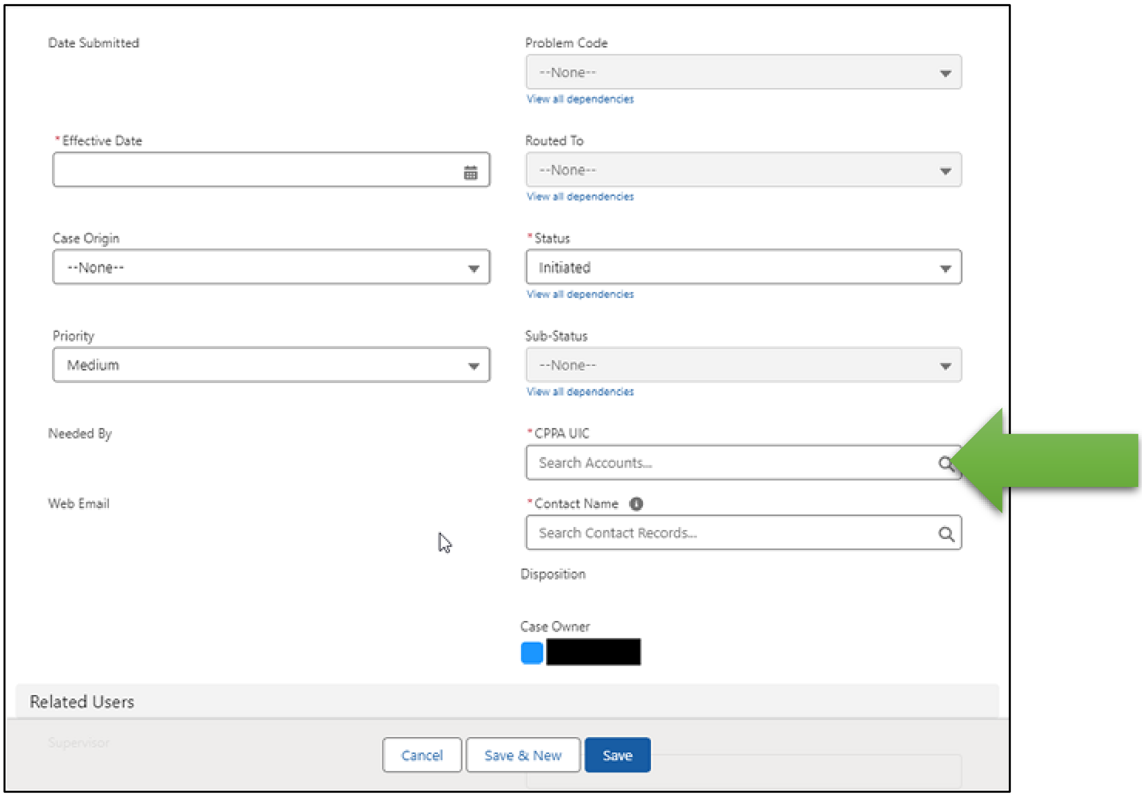
***** APPROVED FOR PUBLIC RELEASE: DISTRIBUTION UNLIMITED *****

POC:

NPPSC MILPERS Department - nppsc-hq-milpers@us.navy.mil

Command UIC Case Team Functionality Overview

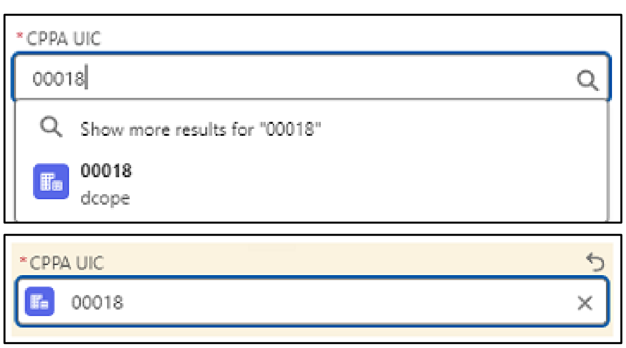
On the standard PersPay Case layout, the CPPA UIC Field is a required field by the CPPA when creating a new case.

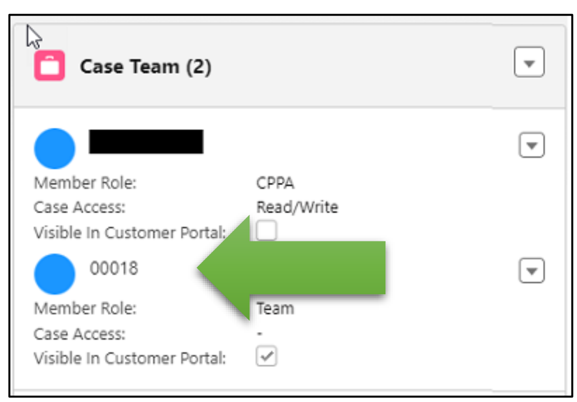


With the next PersPay eCRM update, completion of this field does not change. However, once the case is created the CPPA UIC will be added to a Case Team, and all CPPAs associated with that UIC will have access and management of the cases for their UIC(s).

This means CPPAs will no longer need to manually add/remove CPPAs to the Case Team for a new case. The system has been set up to automatically pull existing data from CPPA Contact Records within eCRM to determine which UIC a CPPA belongs to.

In the event a CPPA needs to be added/removeed from a UIC Case Team, CPPAs may request assistance from their Regional Support Center. RSC eCRM Coordinators will have the ability to manually update UIC Case Teams (add or remove users).





Command UIC Case Team Functionality Overview (cont.)

CPPAs will also have the ability to add multiple case teams to a case, for commands with multiple UICs

When the "Add Team" option is selected, a new field will open and allow the CPPA to select an additional UIC Case Team. When any UIC Case Team is added, every CPPA associated with that UIC Case Team will have full access to the case.

**Note: Only UICs with "need to know" should be added to a case. All Perspay Cases have Personal Identifiable Information (PII) and are subject to audit and review.