



# 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 been 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 functionality.

### WHAT THIS MEANS TO YOU:

- ✚ **CPPAs:** Are now included and have visibility 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 \*\*\***

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### POC:

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## 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.

The screenshot shows a form for creating a new case. The 'CPPA UIC' field is a search box with the placeholder text 'Search Accounts...'. A green arrow points to this field from the right. Other fields include 'Problem Code' (dropdown), 'Effective Date' (calendar), 'Routed To' (dropdown), 'Case Origin' (dropdown), 'Status' (dropdown), 'Priority' (dropdown), 'Sub-Status' (dropdown), 'Needed By', 'Contact Name' (search), 'Web Email', 'Disposition', and 'Case Owner' (checkbox). At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

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/removed 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).

The top screenshot shows a search box with '00018' entered. Below the search box, there is a magnifying glass icon and the text 'Show more results for "00018"'. Below that, there is a result for '00018 dcope' with a blue icon. The bottom screenshot shows the same search box with '00018' entered, but with a blue icon and a confirmation icon (a checkmark) next to it.

The screenshot shows a 'Case Team (2)' interface. It lists two members. The first member has a blue icon, a redacted name, and a role of 'CPPA Read/Write'. The second member has a blue icon, the name '00018', and a role of 'Team'. A green arrow points to the '00018' member. The 'Visible In Customer Portal' checkbox is checked for the 'Team' member.

## 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.

