NAVY PAY AND PERSONNEL SUPPORT CENTER
OPS ALERT

Ser: 022-25

PROCEDURE UPDATE: **ECRM WORKFLOW: STREAMLINING PCS AND PERSPAY SUPPORT**
Release Date: 7/22/2025   Effective Date: Immediately

BLUF: This alert introduces new automation capabilities in enterprise Customer Relationship Management (eCRM/Salesforce) to streamline Permanent Change of Station (PCS) and Personnel & Pay (PersPay) processing for Command Pay and Personnel Administrators (CPPA), Approving Officials (AO), and Fleet users.

BACKGROUND: The eCRM Workflow was developed to enhance the PCS and PersPay processes by automating key administrative tasks within the eCRM system. This automation aims to reduce manual workload, improve accuracy and timeliness, and enhance the overall Sailor experience. By integrating digital questionnaires, automated case creation, and secure DocuSign routing, the workflow streamlines coordination between Sailors, CPPAs, PCS AOs, and Regional Support Centers (RSC).

Sailors selected for the eCRM Workflow by MyNavy Career Center (MNCC) will be notified by their RSC through their CPPA. The initial deployment targets a limited group of Sailors and staff, with plans for broader expansion as the system matures.

PURPOSE AND BENEFITS:

- Reduce manual workload and errors
- Improve accuracy, timeliness, and Sailor experience
- Automate PCS and PersPay processes within eCRM
- Comprehensive workflow prevents missed steps
- Enhanced communication and document management

KEY FEATURES:

- **Digital Questionnaires**: Pre-travel and post-travel info captured via MyNavy Portal
- **DocuSign Integration**: Tracked and secured routing for key documents replaces physical signatures
- **Validation Rules**: Ensures sub-actions (e.g., obligated service, entitlements) are completed
- **Structured Sub-Cases**: Auto-open applicable PersPay sub-cases based on PCS actions
- **Auto Case Creation**: PCS Parent and Sub-Cases auto generated from orders. List on chart below:

Record Types	Request Types	Problem Codes
PCS Parent Transfer Case	Transfers	PCS Transfer
PersPay Sub-Case	MILPAY	PCS Advance Basic Pay
	PCS Activity Gains	PCS Receipts / BAH / Special Pay Start
	PCS NAVPTO Transportation	PCS Passenger Reservation Request (PRR)
	PCS REEN/EXTEN/RIS	PCS OBLISERVE
	PCS Transfers	PCS Activity Loss / Special Pay Stop
	PCS Travel Entitlement	100% Advanced Travel / DLA / TLE
	PCS Travel Reconciliation	PCS Travel Reconciliation

WORKFLOW SUMMARY:

1. **Order Release**: Orders data auto-generates parent/sub (child) cases and pre-travel questionnaire
2. **Sailor**: Completes pre-travel questionnaire in MyNavy Portal
3. **CPPA**: DocuSign routing for PCS Pre-Loss Envelope and submits child cases with required docs
4. **DocuSign Process**: Signed by Sailor, CPPA, and Approving Official; documents will then be automatically stored in eCRM/Salesforce
5. **Post-Travel**: Upon Activity Loss completion, a post-travel questionnaire triggers PCS Gain DocuSign envelope for gains processing

CPPA INSTRUCTIONS:

(IF YOUR SAILOR IS SELECTED FOR ECRM WORKFLOW)

- Use only eCRM Workflow cases for PCS processing; discontinue prior PersPay cases for the same events
- Close or request closure of entitlement/certification cases if not applicable (e.g., same geographic PCS)

TRAINING AND RESOURCES:

- **eCRM Library**: OPS Alerts, PersPay SOPs, eCRM Case Routing Guidance's (eCRM Library) and CPPA Resources can be found on the MyNavy HR CPPA Resources Page: [Click Here](#)
- **Training**: eCRM Workflow CPPA Training: [Click Here](#)

POC:

Refer to your RSC for questions via the MyNavy HR CPPA Resources Page under RSC Contacts: [Click Here](#)

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