



2007 SPO Conference/ Customer Advisory Council Meeting *After Action Report*

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Welcome and Thank You:

A Message from PSC's Commanding Officer, Captain Vincent Weber

"Customer First" is more than a simple catch phrase used but our way of life. It is so important to us that it is talked about everyday and is woven even into our Strategic Plan. PSC understands that for "Customer First" to be successful we need to better communicate our objectives both internally and externally. Our senior managers carefully scrutinize every internal process and contact point (with our customers) in the hopes of doing better. We attempt to reach out to our customer base by allowing every customer in the field an opportunity to tell us how we are doing. This attempt comes in the form of our Customer Service Survey. In many instances our customers are quite happy with how we do business, however, in some instances they are not. In those instances we take a critical look at what the customer is trying to tell us about our processes. And if that means re-engaging a case again, then we do it, for our main objective is for all our customers to have a positive customer service experience with us.

No one likes to hear that they are not doing well. PSC is no different, and while some of the feedback can be emotional we have personnel here that take a sincere look at all the feedback to determine the flashpoint. In some cases our representatives have gone as far as testing the system against what the customer is saying only to find out that what the customer stated was correct. In other cases our representatives have used unique experiences of customers to educate them. Regardless of the situation, the end result is generally a new understanding and respect that comes about when people take the time to listen and connect. The feedback we read on a daily basis forces us to critically look at how we do business and this has often resulted in changes. Some are very apparent and others not so, but they are changes and improvements, nevertheless.

As a result of the "Customer First" mandate there have been two internal task forces created at PSC to better serve our customers. One such task force was the short-term Customer Relations Management Council led by PSC's Executive Officer which resulted in everyone in the building learning to document every incoming and outgoing situation with the Help Desk Expert Automation Tool (HEAT). This tool has allowed the various entities within the PSC to communicate amongst themselves when it comes to resolving customer service issues. This tool has also enabled every PSC customer service representative to be able to view a customer service inquiry from beginning to the end and has resulted in fewer dropped services requests.

Another internal task force is the ongoing Customer Relations Council (CRC). The CRC was specifically established to be an advocate for the customer and is made up of individuals from outside the senior management level whose sole purpose is to review PSC customer contact processes (both incoming and outgoing) and ask the question, "Can we do (this) better?"

SPO Survey Feedback: For this segment of the conference, the Executive Officer and Division Directors answered questions from attendees pertaining to the SPO survey resulting in the following dialogue:

The **Customer Care Branch** at PSC is the central processing point for all customer service inquiries with the exception of Legal, Advancement, Retiree & Annuitant Services (RAS), and Debt Collections, which may receive a majority of their inquiries directly. Furthering efforts to provide better service and improve communications, several positions within Customer Care were recently upgraded from E-4 to E-6, and the "Help Desk Expert Automation Tool" (HEAT) was installed and implemented throughout most of PSC, creating a tracking system for help requests from the field. HEAT allows our technicians to view customer help requests so that issues may be identified, resolved and communicated back out to the field.

SPOs are encouraged to be the first tier of support and their customers should ideally contact them prior to contacting Customer Care at PSC. This ensures routine issues are handled at the SPO level and frees up PSC agents to answer/resolve more complex issues coming from the field. Statistics show that PSC currently is turning customer service inquiries around well within their prescribed 3-day parameters. Unsatisfactory customer service experiences, however, should be brought to the attention of our Customer Care supervisor Karen Stadler who can be reached at 785.339.2205 or Karen.S.Stadler@uscg.mil.

Q&A, in general:

There was a concern expressed about the time differences between some field locations and PSC and the request was made for us to extend our work day. Research shows about 15% of total traffic received at PSC is from OUTCONUS/ West Coast. While this doesn't minimize issues or alleviate stress; the best option because of the distance and time difference is to submit concerns via the web form or email which will alleviate the additional stress that can be caused by a SPO Yeoman having to correspond in the middle of their night with a work day looming the next morning.

Concerns captured and to be explored are:

- ◆ Does PSC prioritize trouble tickets? No tickets are resolved in a first come first serve basis.
- ◆ Will PSC consider having a SPO hotline? No, not at this time.
- ◆ We want better follow up from PSC and we would like links to the references and DA tutorials. Noted, PSC will look into this closer.

What's Ahead? E-Travel/Global Pay Update; SPO Trend Analysis; Audit/Actuarial Findings.

The Federal Government mandates that by the end of 2008 some form of **E-Travel** must be utilized for the processing and payment of all government travel claims. The Department of Homeland Security entered a contract with EDS (Ross Perot's former company) for a version called "FedTraveler," however, at the moment the program is not JFTR compliant and adjustments are currently underway.

As part of the service-wide move to a web-enabled pay and personnel records system, the records and pay system for Retirees was transferred to **Global Pay** (Another Oracle/PeopleSoft product) in April of 2008, after more than two years in development and several months of parallel testing. A Self-Service component, which will be implemented later this year, will allow retirees to make on-line changes to their own personal data (mailing address, telephone number, allotments/bonds and banking information).

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Timeliness and Financial Accountability was the theme for the next two segments of the conference: **SPO Trend Analysis** and **Audit/Actuarial Findings**. Submitting late documents will always result in exceptions, offline payments, and/or overpayments and always come at a cost to the member. As a result, PSC has taken steps to begin tracking the timeliness of documents submitted by SPOs. The plan is to have a report refreshed weekly (i.e., "SPO Timeliness") for individual SPOs to view their own information. The intent is to show SPOs their strengths and weaknesses while providing them a tool to use for management and training in this area. PSC, on the other hand, will use the reports to identify trends, develop training or other approaches to assist SPOs with submitting transactions more timely, resulting in "win-wins" for all.

Regarding **audit/actuarial findings**, the US Coast Guard has a history rich in excelling in its operational responsibilities. We find, however, with the Commandant placing a stronger emphasis on financial areas, that the Coast Guard's financial processes are lacking. ADM Allen has revised our overall strategy so that formal corrective measures may be created to fortify this area. This new vision will impact all SPOs in field units as they will be able to expect audits of leave papers/procedures in 2009. PSC will remain steadfast in the commitment to provide leadership and training so that our customers may achieve success.

Representatives from the Advancements (ADV) Branch Section emphasized that attention to detail is paramount in all processes related to Advancements, Evaluations, and Data input. Specifically:

The first rule in ADV is that advancement requirements and policies are applied equally to every member without exception.

- ◆ Retroactive advancements can be only 30 days or less.
- ◆ It is everyone's responsibility to complete all advancement eligibility requirements prior to the deadline date.
- ◆ All members must review their PDEs for accuracy, report discrepancies and review their online PDE in DA to ensure corrections are posted and visible prior to the PDE correction deadline date.
- ◆ When someone is taking a SWE test, be sure to fill out the bubble sheet correctly to ensure it gets graded without errors.
- ◆ SPOs need to notify PSC prior to the first of the month about delays in advancements for weight standards, etc.

Important nuggets for units to remember in regards to evaluations are:

- ◆ EERs must be forwarded through the chain of command so all signatures (endorsers block needs to be filled in) are there.
- ◆ Don't click "final" unless you are the final approving authority, for DA immediately places the EER in a queue.
- ◆ Members and supervisors need to ensure they use the correct effective date. Changes to the effective date results in lost effort as the EER resets itself.
- ◆ Be sure to create an EER following a disciplinary event. This will ensure that the Good Conduct date is reset and will remove the member from any advancement list.

Attention to detail as it pertains to data input continues to be paramount. An incorrect accession results in problems across the board for our members. If you have any questions concerning PSC Advancements, feel free to call them at 785-339-3400 or email them directly in Global at PSC-DG-ADV.

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For the two-part **ID/Reserve DMDC Issues** segment, CWO Rene Morales opened with a brief history and overview on the Defense Manpower Data Center (DMDC) and their mission. The attendees were briefed on where the Coast Guard liaison fits in the process and how the DMDC uses our data in everything ranging from DEERS to VA Benefits. By being co-located on the same floor as the DEERS, CWO Morales is also the unofficial West Coast DEERS Project Officer in that he works along with DEERS to resolve a myriad of DEERS/Eligibility issues. For customers who may need assistance with DEERS or Coast Guard data issues, CWO Morales can be reached at 831.582.2400 ext 4361 or at Rene.Morales@uscg.mil.

The **Customer Relations Council (CRC)** held their inaugural session regarding customer relations with the attendees and it appeared to be a resounding success for all involved. All attendees were divided into groups by pay grade where SWOT (**S**trengths, **W**eaknesses, **O**pportunities, & **T**hreats) Analysis exercises were conducted, questions were asked, and spirited discussions broke out. Your feedback is being reviewed by the CRC team and their results, analysis and conclusions will be reported back to you in the near future in a separate issue.

Breakout Sessions

TRAVEL

"We want our claims processed on our first try." *That can be accomplished by ensuring the orders, any amendments, and the travel claim itself have original signatures signed in blue ink (IAW COMDTINST M5216.4C, 1.B.3). Members are reminded to keep receipts for lodging, rental vehicles, air fare and individual expenditures of \$75 and over. For more information, see the PPPM, (PSCINST M1000.2A) 2-B-3 and 2-B-17.*

"Customers' Concern" / PSC's Response

"We want to be able to track travel claims." *That can now be done through TPAX or FINCEN's website:*

<https://www.fincen.uscg.mil/secure/TravelPay/TPQuery.htm>

"What is your travel audit process? It is so confusing and sometimes inconsistent." *Parameters in the PPPM, PSCINST M1000.2A, 2-B-17 are strictly adhered to.*

"Why am I not getting notified by email that I am being audited?" *Customers are reminded to have their current email address in TPAX. (PPPM, PSCINST M1000.2A, 2-B-18)*

"Can I look to see if I am being audited? Or if I have any outstanding audits?" *Yes, by accessing:*

http://cgweb.fincen.uscg.mil/tvs_aux2/

"Can we track audits for our unit members?" *Yes, by accessing:*

<http://cgweb.psc.uscg.mil/travel/audits/default.asp>

"Why are you auditing my claim a second time?" *All travel claims greater than \$2,500 will be audited (as well as 10 - 15% randomly selected claims). If a traveler does a supplemental on a travel claim audited once before and it remains over \$2,500, the claim will be audited again. Important: Customers or their representatives should not send copies to Travel until an audit has been officially requested through e-mail notification. (PSCINST M1000.2A, 2-B-17)*

"What can we do if we're not very familiar with some T-PAX procedures?" *The online manual is available through PSC's Intranet website: <http://cgweb.psc.uscg.mil/travel/t-pax/webhelp/>. There are also tutorials available and you can sign up to attend one of PSC's HR Workshops. See the Procedures & Development branch web page at <http://www.uscg.mil/hq/psc/pd.asp> for more information.*

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ACCESSIONS

No way around it, to fully understand the whole hire/rehire evolution one must read the Direct Access Supplement to the Coast Guard Personnel Manual, Coast Guard Reserve Policy Manual, and the Coast Guard Recruiting Manual at <http://www.uscg.mil/hq/psc/ps/accessions.pdf>. Unfortunately this is not information one can quickly glance at and hope to correctly complete a hire or rehire. This is a complex evolution that the SPO needs to completely understand in order to see how everything ties in.

One common error that causes major problems for the SPO (and ultimately the member) is when the Applicant ID is not used as appropriate. It is critical that SPOs first review the Direct Access supplement to see when to use the Applicant ID or EMPLID.

Another common error which occurs is the example of a former active duty member with a total of eight (8) years of service or a reservist who tries to come back on active duty. When bringing someone back on active duty, it is imperative that the SPO discharges, rehires, and then processes PCS orders. It must be done in this order. There are no exceptions:

1. Discharge
2. Rehire
3. Orders

While smaller versions of help guides (e.g., FEAR NOT THE ACCESSION) can be helpful, it can't be stressed enough that the Supplement being read from cover to cover is the best way to alleviate any stress related to the Accession. You can find it at <http://www.uscg.mil/hq/psc/ps/accessions.pdf>.

Some of you told us the *Fast Track Program* is another area of concern. Like anyone coming back onto active duty, the first thing a SPO should do is discharge the person from the reserve component.

EXCEPTIONS REPORT TEAM (ERT)/PAY TEAM

In general, accessions continue to be an item of high interest across the Coast Guard and at PSC. Subsequently, there has been dialogue among the major players such as Training Center Cape May, Recruiting Command, and various FOTs. The hope/intent is to alleviate the stress for the new recruit or the former member who elects to come on or come back on active duty, as well as the Commands that will support this person. This has initially resulted in a trip to the Recruiting Command and there has been some movement, but much work lies ahead for all involved. Additionally, for officer accessions (i.e. ROCI, OCS etc), more emphasis is being placed on the assignment officers to produce the appropriate orders and correct locations.

The ERT/Pay Team recently completed a study to determine the pros and cons of removing the TDY entitlement in DA and replacing it with a new form. The hope was the new form would reduce overpayments while capturing missed meals only. New procedures were published in E-Mail ALSPO message A/08.

Concerns about an Auditors "C" School and changes to the Pay Manual were communicated and forwarded to the Yeoman Force Manager. Concerns about better feedback, problems with TDY entitlements, Exceptions that inadvertently credited to the incorrect unit were expressed to the ERT/Pay Team representatives. Many of these concerns continue to be addressed through internal training.

SEPARATIONS

The Separations & Service Validation Branch saw their break-out sessions as opportunities to meet members and SPOs in the field.

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When working Coast Guard separations and service validation cases, you are strongly encouraged to become more familiar with the contents of the PPPM, PSCINST M1000.2A, 3.B and 5.C. The manual provides a wealth of information on timeline requirements and covers both PSC and SPO processing procedures. Even though the manual gives excellent guidance, you are also encouraged to continue sending email to PSC-CustomerCare@uscg.mil and/or the PSC-PF-SES@uscg.mil message board on Global when answers to specific issues are needed. Our SES message board is a direct link to key personnel in the SES Branch. It serves as a vital communication tool for SPOs and assists us with internal tracking and work-flow. If your matter needs the attention of the SES pay supervisor (785)339-3548, or the Branch Chief (785)339-3551, do not hesitate to call.

In Summary:

The 2007 Advisory Council Meeting/SPO Conference was a major success and we encourage you to share your experience with your Command and peers. You learned how important you are to us and that we all win when we hear from you.

The PSC was pleased with the turnout, with 38 out of 114 SPOs being represented. Your feedback is critical to our processes that are always in support of you in the field.

As often as you can, please take time out of your busy schedule to complete our [PSC Customer Satisfaction Survey](#), as well as continue reading our [newsletters](#) and providing us with topic ideas. Letting us know about the problems you are having provides us with opportunities to find solutions that ultimately make doing your job easier, and that's what we're all about.

It gives us distinct pleasure to continue providing you with optimal pay and personnel services, and we look forward to finding new ways to strengthen our partnership with you. The PSC Customer Advisory Council/SPO Conference is one way to do that and we appreciate your involvement that has again made it such a success.

2008 ADVISORY COUNCIL MEETING/SPO CONFERENCE

The next Customer Advisory Council meeting/SPO Conference is scheduled for 8-12 September 2008. More details will be available soon. We hope to see you at the 2008 meeting!

Thank you.