

School Based Advancements

Introduction:

This section will guide you through the process of creating and processing "A" School and Recruit Training advancement boards. For general information on using the "Maintain Boards" page, you should review the boards lesson entitled "**Maintain the Board**".

Before you begin:

If possible, have the Board Type Code. Recruit Training boards will be created with the code RECTRN, and in general, "A" School board names types consist of the rating followed by "_A". However, if you do not know the Board Type Code value, you may perform a lookup as follows and select the code from the available list returned.

Detailed Directions:

Step	Description						
1	<p>Select from the home menu bar Develop Workforce>, Career Management>, Setup>, and Maintain Boards.</p> <ul style="list-style-type: none"> Alternate path: Select from the home menu bar Develop Workforce>, Career Management>, Setup>, and Board/Panel Setup Home. Select the Maintain Boards and Panels link. <p>Enter a Board Type Code, Sequence Number, or Active Duty Reserve Indicator and press the Search button. Select the Board Type Code from the available list.</p> <p>Note: For each new class session, you must press the Add a New Value link to generate a new instance of that board type. Enter the Board Type Code or use the lookup and enter the description %A School% then press Search. Select the correct A School from the available list. Enter Active Duty for the Active Duty Reserve Indicator. Once all the values are complete, press the Add button. On the new page, you will enter the data and press the Save button. The Sequence Number is updated automatically when the page is saved.</p> <p>Sample graphic of lookup for Board Type Code:</p> <p>Home > Develop Workforce > Career Management > Setup > Maintain Boards</p> <h3>Lookup Board Type Code</h3> <p>Board Type Code: <input type="text"/></p> <p>Description: <input type="text" value="%A SCHOOL%"/></p> <p><input type="button" value="Lookup"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> Basic Lookup</p> <h3>Search Results</h3> <p>View All First <input type="button" value="◀"/> 1-31 of 31 <input type="button" value="▶"/> Last</p> <table border="1"> <thead> <tr> <th>Board Type Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>AT_A</td> <td>Aviat Electron Tech - A School</td> </tr> <tr> <td>AE_A</td> <td>Aviatio Elec. Mate - A School</td> </tr> </tbody> </table>	Board Type Code	Description	AT_A	Aviat Electron Tech - A School	AE_A	Aviatio Elec. Mate - A School
Board Type Code	Description						
AT_A	Aviat Electron Tech - A School						
AE_A	Aviatio Elec. Mate - A School						

2

On the "Maintain Boards" page, complete the fields as follows:

- Enter the Graduation Date of the "A" School or Recruit Training Class.
- Set the Status to **'In-Session'**.
- Select **'PROMO'** for the Imaging Profile.
- Select **'A School'** for the Security Type
- Select **'ASCH'** for the Group ID.
- The Cand Job Code should be the *primary* jobcode of the members who are completing "A" School or Recruit Training (The most common values will be: 461096 Airman, 432096 Fireman, 415096 Seaman, or 415098 Seaman Recruit). If graduating personnel have multiple jobcodes for that school session, you should select the jobcode held by the majority of the class.
- The Promo Jobcode should be the jobcode that class will be advanced to. Use the magnifying glass to look-up the appropriate jobcode.
- Enter a **1** for the Start Sig#. This number does not pertain to "A" School advancements but it must still be entered for the page to function properly.

Sample graphic:

Maintain Boards A School/PG Sch/SSS

Brd Type: AT_A Aviat Electron Tech - A School **AD/Res Ind:** Active **Sequence:** 1

Convene Dt: 03/21/2003	'Group ID: ASCH A-School
Status: In-Session	'Cand Job Code: 461096 AN
'Imaging Profile: PROMO	Promo Job Code: 455095 AT3
'Security Type: Promotion	Start Sig#: 1
<input type="checkbox"/> Best Qual Brd	Zone Size/Cut:
Num to Select:	War/E2JG Dor:
Min Allow Score:	Pop Brd Cand Compute Final Multiple
Max Allow Score:	
Accomplishment:	

3

In order to prepare to automatically populate the board with candidates for advancement, click the **A School/PG Sch/SSS** tab. Enter the Course number and Session Number for the "A" School. (Recruit Training Classes must be populated manually until such time as a member's course session data is available in PeopleSoft). Press the **Save** button.

Maintain Boards A School/PG Sch/SSS

Brd Type Cd: AT_A Aviat Electron Tech - A School AD/Res Ind: Active Sequence: 1

A School Courses View All First 1 of 1 Last
'Course: 501071 AVIONICS TECHNICIAN 'Session Nbr: 0012

PG School View All First 1 of 1 Last
Job Req#:

Sen Srvc School View All First 1 of 1 Last
Start Year: EX: 1999

Return to the "Maintain Boards" page by pressing the **Maintain Boards** tab. Press the **Pop Brd Cand** button. This will insert onto the board all the students who have **completed** that course and session.

4

To review the board candidates, select from the home menu bar **Develop Workforce>, Career Management>, Use>, and Board Candidates**. Look up the board that was created in Step 2.

Sample lookup:

Find an Existing Value

Board Type Code: AT_A
Sequence Number: 1
Active Duty Reserve Indicator: Active Duty
User ID: KQUINTAR
Description:
Start Date:
 Case Sensitive
Search Clear Basic Search

The students who have completed the course session used to populate the board in the previous step should appear as candidates on the board.

Board Candidate

Brd Type: AT_A Aviat Electron Tech - **Status:** | **AD/Res Ind:** Active
A School

Seq: 1 **Elig**

Board/Panel Candidates									
Find View All First 1-8 of 24 Last									
Member Information		Officer Status		Board Information		Description			
	Zone	EmplID	Rcd#	Rank	Name	Waivers	Cand Status	Exp AD Term	
1	In	9872353	0	GM3	<i>Powers, Mark</i>	Waivers	Select	01/02/2006	+ -
2	In	9982705	0	GM3	<i>Hill, Charles</i>	Waivers	Select	12/29/2005	+ -
3	In	9864003	0	FN	<i>Davis, Tracy</i>	Waivers	Select	11/06/2005	+ -
4	In	9880077	0	SNGM	<i>Allen, Dan</i>	Waivers	Select	01/13/2006	+ -

For "A" School candidates, no action should be required on this page. However, if you wish to manually add or delete candidates from the list (as is currently required for Recruit Training Classes), you may do so by pressing the **Plus Symbol** button. This will add a row and allow you to enter a candidate's information. Pressing the **Minus Symbol** button will allow you to delete a row. In order for the candidate to be processed for advancement, the candidate must be saved with a **Cand Status** of "Select". Press the **Save** button when all changes, additions, and deletions are complete.

- 5 Select from the home menu bar **Develop Workforce>**, **Career Management>**, **Use>**, and **Post Board Activities**. Select the List ID (A-School Advancements), Effective Date (01/01/2003), and the Active Duty Reserve Indicator ("Active Duty" or "Reserve – Active Component" as Appropriate). Press **Search** and select from the list returned. (sample of list options shown below)

Sample of Post Board Activities search for board set up in Step 2:

[Home](#) > [Develop Workforce](#) > [Career Management](#) > [Use](#) > **Post Board Activities**

Post Board Activities

Find an Existing Value

List ID:

Effective Date:

Active Duty Reserve Indicator:

[Basic Search](#)

- 6 This takes you to the "Post Board Activities" page. In order to bring up your list of candidates, you must enter a Board Type Code and a Sequence Number. In the above example, you would enter "AT_" and Sequence Number of "1". Press the **Populate A School** button. This pulls all selected candidates from the board session. Verify the jobcode for each member as members receiving designators will require changes to this field.

Enter the Date of Rank (DOR) for the advancement and press the **Select All** button. This will populate the Rank/Contract date field for each member. You may override the DOR at the

individual member level simply by typing in a new DOR.

Find | View All First 1-8 of 24 Last

Promo Job Code	Select #	Board Type Code	Convenc Dt	Payroll Trans Type	Rank/Contract Begin	Contract End	Promote
455095	<input type="text"/>	AT_A	01/01/2003	Advanced To	02/01/2003		<input checked="" type="checkbox"/>
455095	<input type="text"/>	AT_A	01/01/2003	Advanced To	02/01/2003		<input checked="" type="checkbox"/>
455095	<input type="text"/>	AT_A	01/01/2003	Advanced To	02/01/2003		<input checked="" type="checkbox"/>
455095	<input type="text"/>	AT_A	01/01/2003	Advanced To	02/01/2003		<input checked="" type="checkbox"/>
455095	<input type="text"/>	AT_A	01/01/2003	Advanced To	02/01/2003		<input checked="" type="checkbox"/>
455095	<input type="text"/>	AT_A	01/01/2003	Advanced To	02/01/2003		<input checked="" type="checkbox"/>

7 The Promo Job Code will default to the Promo Jobcode entered on the "Maintain Boards" page from Step 2 above. You may override the Promo Jobcode at the individual member level simply by typing in a new jobcode.

The Payroll Trans Type will default to "**Advanced To**" but may be changed, if necessary. The values are Change in Rating, Reduced To, or Add Designator.

When you are satisfied that all information on the page is correct, press the **Save** button. The advancement transaction is created when the page is saved.

8 Note: If you need to reverse a transaction after you have saved the "Post Board Activities" page, contact HRSIC-ADV@hric.uscg.mil.

9 To repeat this function, select **Return to Search**. To perform another function, choose from the menu. To exit, press the **Sign Out** link located at the top of the page.

For additional information on the processes reviewed above, review the lessons entitled **Maintain the Board, Board Candidates, and Advance/Promote Members from Board Candidates**.

Advance/Promote One Member

Introduction:

This section will guide you through the process to advance one member.

Before you begin:

If possible, have the employee ID. If you do not have the employee ID, you may press search and select from the available list returned.

Detailed Directions:

Step	Description																																							
1	<p>Select from the home menu bar Develop Workforce>, Career Management>, Use>, and Adv/Promote One Member.</p> <p>Enter the Employee ID number and press Enter. Or you may enter search criteria, press Search, and choose from the list returned.</p>																																							
2	<p>Select the Pay System Transaction. Select the Action Reason. In the Select Job Info block, enter the Job Code the member will enter. Then enter the Date of Rank?Effective Date for the new Job Code. All the other fields should default in (the Salary Admin Plan, the Salary Grade).</p> <p>Home > Develop Workforce > Career Management > Use > Adv/Promote One Member New Window</p> <p>Advance/Promote One Member</p> <p>EmpID: 9937959 Name: Jones,Adam Rcd Nbr: 0</p> <hr/> <p>Current Job Code: 201897 PERS2 Active Duty Base Date: 02/16/1984</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> Pay System Transaction <input checked="" type="radio"/> Adv,Red,Chg in Rate,Promo <input type="radio"/> App Com Off from Enl/Warr <input type="checkbox"/> Create Discharge Trans </td> <td style="width: 50%; vertical-align: top;"> Action Reason <input checked="" type="radio"/> Advanced To <input type="radio"/> Reduced To <input type="radio"/> Change in Rating <input type="radio"/> Add Designator </td> </tr> </table> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Select Job Info:</p> <p>Job Code: <input type="text" value="201896"/> Personnel Admin Warrant 3 Date of Rank/Effdt: <input type="text" value="03/01/2003"/></p> <p>Sal Admin Plan: <input type="text" value="WAR"/> Warrant Officer Pay Scale Salary Grade: <input type="text" value="W3"/></p> </div> <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th colspan="11" style="background-color: #4F81BD; color: white;">Career Information</th> <th style="text-align: right;">View All</th> <th style="text-align: right;">First</th> <th style="text-align: right;">1 of 1</th> <th style="text-align: right;">Last</th> </tr> <tr> <th>Job Code</th> <th>Rank</th> <th>*Rank Status</th> <th>Promo Stat</th> <th>Initial Source</th> <th>Yr Grp</th> <th>Commissioned</th> <th>Category</th> <th>Source</th> <th>Signal</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="text" value="201897"/></td> <td>PERS2</td> <td>Perm</td> <td>Not Eligib</td> <td>N</td> <td>2002</td> <td>10/01/2002</td> <td>2</td> <td>7</td> <td>9712</td> <td><input type="button" value="+"/> <input type="button" value="-"/></td> </tr> </tbody> </table> <p><input type="button" value="Save"/> <input type="button" value="Return to Search"/></p> <p>Review the information in the Career Information row. At this time, a row will exist for officers only. The Job Code will reflect the members job prior to promotion. Press the Plus Symbol button to add a new row. Enter the Job Code for the new position. Complete all applicable fields for this Job Code. Select values from the drop-down menus, as appropriate.</p> <p>Carefully review the information on the page. If all entries are correct and you are ready to process</p>	Pay System Transaction <input checked="" type="radio"/> Adv,Red,Chg in Rate,Promo <input type="radio"/> App Com Off from Enl/Warr <input type="checkbox"/> Create Discharge Trans	Action Reason <input checked="" type="radio"/> Advanced To <input type="radio"/> Reduced To <input type="radio"/> Change in Rating <input type="radio"/> Add Designator	Career Information											View All	First	1 of 1	Last	Job Code	Rank	*Rank Status	Promo Stat	Initial Source	Yr Grp	Commissioned	Category	Source	Signal		<input type="text" value="201897"/>	PERS2	Perm	Not Eligib	N	2002	10/01/2002	2	7	9712	<input type="button" value="+"/> <input type="button" value="-"/>
Pay System Transaction <input checked="" type="radio"/> Adv,Red,Chg in Rate,Promo <input type="radio"/> App Com Off from Enl/Warr <input type="checkbox"/> Create Discharge Trans	Action Reason <input checked="" type="radio"/> Advanced To <input type="radio"/> Reduced To <input type="radio"/> Change in Rating <input type="radio"/> Add Designator																																							
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Job Code	Rank	*Rank Status	Promo Stat	Initial Source	Yr Grp	Commissioned	Category	Source	Signal																															
<input type="text" value="201897"/>	PERS2	Perm	Not Eligib	N	2002	10/01/2002	2	7	9712	<input type="button" value="+"/> <input type="button" value="-"/>																														

	the promotion, press the Save button.
3	If you discover an error after saving the promotion, you may use the "Reverse/Advance Promotion" page to reverse the transaction. See the lesson entitled " Reverse/Advance Promotion " for additional details.
4	To promote another member, select Return to Search . To perform another function, choose from the business process menu on the left side of your page. To exit, press the <u>Sign Out</u> link located at the top of the page.

Reverse Advance/Promote One Member

Introduction:

This section will guide you through the process to reverse the advancement/promotion of one member.

Before you begin:

If possible, have the employee ID. If you do not have the employee ID, you may press search and select from the available list returned.

Detailed Directions:

Step	Description
1	<p>Select from the home menu bar Develop Workforce>, Career Management>, Use>, and Reverse Advancement/Promotion.</p> <p>Enter the Employee ID and press Enter. Or you may enter search criteria, press Search, and choose from the list returned.</p>
2	<p>If this promotion is related to a board advancement, enter the Board Type, active duty/reserve (AD/Res) Indicator, and board Sequence Number. Then press the Submit button.</p> <p>Select the transaction to reverse. Click on the Delete box for the transaction you wish to reverse. Note if the transaction has a check in the sent box. This indicates if the transaction has already been sent to the JAG interface. Carefully review the information. If you are ready to process the reversal, press the Submit button.</p>

Reserve AdvPromotion

EmpID: 9937959

Name: Jones,Adam

Rcd Nbr: 0

Board Type: AD Res Ind: Seq Num:

Select the Transaction to Reverse

[View All](#) First 1 of 3 Last

Delete	Action	Reason	Pay Trans	Exp Loss	User ID	Date/Time	Action	Sent
<input checked="" type="checkbox"/>	Promotion	Advance	03/01/2003		RHALEY5	02/24/2003 13:29:41.000000	Add	<input type="checkbox"/>

Career Information

[View All](#) First 1 of 1 Last

Job Code	Rank	*Rank Status	Pro Status	Initial Source	Yr Grp	Commissioned	Category	Source	Signal
201897 <input type="button" value="Q"/>	PERS2	Perm <input type="button" value="v"/>	Not Eligi <input type="button" value="v"/>	Direct O <input type="button" value="v"/>	2002	10/01/21 <input type="button" value="B"/>	Reg Ter <input type="button" value="v"/>	Other Ap <input type="button" value="v"/>	9712

Member Job History

[View All](#) First 1-3 of 16 Last

Effective Date	Seq	Action	Reason	Job Code	Grade	Sal Admin Plan	Empl Class	Status
03/01/2003	1	PRO	NCP	201896	W3	WAR	Regular	Active
03/01/2003	0	PRO	NCP	201896	W3	WAR	Regular	Active
10/01/2002	0	PRO	NCP	201897	W2	WAR	Regular	Active

[Transfer to Job Pages](#) [Mbr Career Info](#) [Transfer to Post Board Activities](#)

3

Click the [Transfer to Job Pages](#) link to review the member's "Job" pages.

Jones, Adam Employee ID: **9937959** Empl Rcd#: 0

Work Location View All First ◀ 1 of 1 ▶ Last

Employee Status: Active Date Created: 03/01/2003 + -
 *Effective Date: 03/01/2003 Effective Sequence: 1 *Job Indicator: Primary Job
 Action / Reason: Promotion NCP Normal Career Progression Future

Position Number: 00059789 UNBUDGETED POSITION Position Entry Date: 06/03/2002
 *Regulatory Region: AUSCG US Coast Guard
 *Company: CGA Active Coast Guard Employees
 *Business Unit: AUSCG All U. S. Coast Guard Units
 *Department: 003404 HRSIC TRAVEL BUS LINE Department Entry Date: 06/03/2002
 Location: KS0001 CG HRSIC
 Supervisor ID:

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

4 Click the [Mbr Career Info](#) link to review the "Member Career Detail" page.

Name: **Jones, Adam** Empl Rcd#: 0 EmplID: **9937959**

Member Flags View All First ◀ 1 of 1 ▶ Last

Member Flag
1

Cumulative Sea Time

Years	Months	Days
<input type="text"/>	<input type="text"/>	<input type="text"/>

Career Intentions

Eff Date: 02/24/2003 Career Intent:

Career Information View All First ◀ 1 of 1 ▶ Last

Rank	Rank Status	Pro Status	Initial Source	Yr Grp	Commissioned	Category	Source	Signal
PERS2	Perm	Not Eligib	Direct Oth	2002	10/01/2002	Reg Temp	Other Appt	9712

5

Click the [Transfer to Post Board Activities](#) link to review the "Post Board Activities" page. You are prompted to enter the List ID, active duty/reserve (AD/Res) Indicator, and Effective Date to access the appropriate "Post Board Activities" page. Below is a sample of an ADPL promotion page.

[Home](#) > [Develop Workforce](#) > [Career Management](#) > [Use](#) > **Post Board Activities** [New Window](#)

Post Board Activities

List ID:	ADPL Promotion	AD Res Ind:	Active	Effdt:	10/01/2002
-----------------	----------------	--------------------	--------	---------------	------------

Date of Rank

03/01/2003

Promote Member Find | View All First 1-3 of 3 Last

Member Information DOR/Promote

	EmplID	Rcd	Zone	Rank	Name	Job Code	Grade Entry Date	Select #
1	9939808	0	In	LT	Jones,Eve	000096	01/10/2000	2305
2	9872353	0	In	LT	Powers,Mark	000096	07/06/1999	2306
3	9982705	0	In	LTJG	Hill,Charles	000097	10/01/2002	27

Note: If this were a "Post Board Activities" page for enlisted persons, the button would be to **Create EPAA**.

6

To reverse another transaction, select **Return to Search**. To perform another function, choose from the business process menu on the left side of your page. To exit, press the [Sign Out](#) link located at the top of the page.