

**COAST GUARD PERSONNEL ACCOUNTABILITY
AND ASSESSMENT SYSTEM (CGPAAS)**

Commanding Officer's User Guide

for

**U.S. Coast Guard
Human Resources (CG-1)**



Version 3.1

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**Commandant (CG-1)
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Revision History

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Apr 2013	1.3	Updated to add section on Admin Tab (District CORs only); to change formatting to left justify text throughout, and to use styles; and to reflect updated software.	SSC Pacific
Sep 2011	1.2	Updated whole document to reflect current software version.	SSC Pacific
Apr 2011	1.1	Updated CGPAAS URL.	SSC SD
Oct 2009	1.0	Initial Version for Coast Guard CGPAAS 1.0.	SSC SD

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1 General Information

This User Guide is for all Commanding Officers (COs), and their representatives who use the Coast Guard Personnel Accountability and Assessment System (CGPAAS), specifically, the following user types:

- COR – Commanding Officer Representative
- CGHQ – Coast Guard Users at Headquarters
- District COR

Different user types have different permissions in CGPAAS. Where needed, this guide will indicate if there are any restrictions and which user types are allowed to perform a task.

1.1 Login to CGPAAS

To get started with CGPAAS, you will need access to a computer connected to the internet. From there, perform the following steps.

- a. Insert your CAC into your computer's CAC reader.
- b. Using an internet browser, navigate to the CGPAAS Support System: <https://cgpaas.uscg.mil>. **NOTE:** "https" is required in the web address.
- c. The "CGPAAS Login Page" will be displayed:

***** Unclassified//For Official Use Only *****

CGPAAS

Coast Guard Personnel
Accountability & Assessment System

What is CGPAAS?

Coast Guard Personnel Accountability and Assessment System (CGPAAS) standardizes a method for the Coast Guard to account, manage, and monitor the recovery process for personnel and their families affected and/or scattered by a wide-spread catastrophic event. CGPAAS provides valuable information to all levels of the Coast Guard chain of command, allowing commanders to make strategic decisions which facilitate a return to stability.

CGPAAS allows Coast Guard Personnel to do the following:

- Report Accounting Status
- Update Contact
- Location Information
- View Reference Information

To access all features available to you, log in with your PIV/CAC.

Insert your PIV/CAC before logging in.

LOG IN WITH YOUR PIV/CAC

OR

Log in with limited access using your username or DoD ID and password.

LOG IN WITH LIMITED ACCESS

[Reset your password](#)

Technical Assistance

For assistance/technical issues, please contact the CGPAAS Helpdesk. You may also send an e-mail to cgpaas@navy.mil. Please include your name, primary email address and Dest ID (if possible) in order to contact you. Please do **NOT** include SSN/DOB.

[Contact CGPAAS Support](#)
This is an Official U.S. Coast Guard Web Site
[Privacy & Security Notice](#)

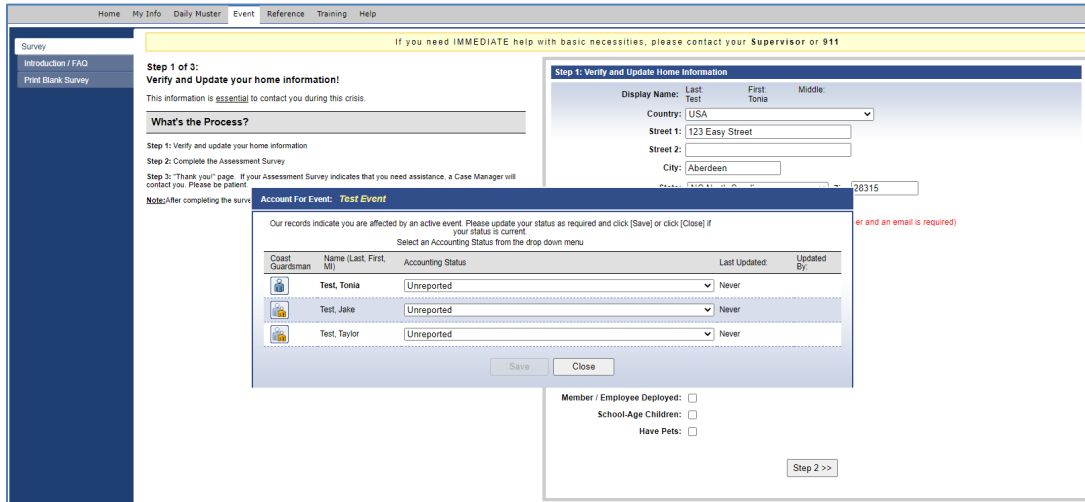
SSN and DOB are used by CGPAAS for user login and authentication only. They are sent to CGPAAS in encrypted format. SSN and DOB information already resides in CGPAAS and is not captured and stored from

- d. Click the **Log in with Your PIV/CAC** button to log in with elevated permission.

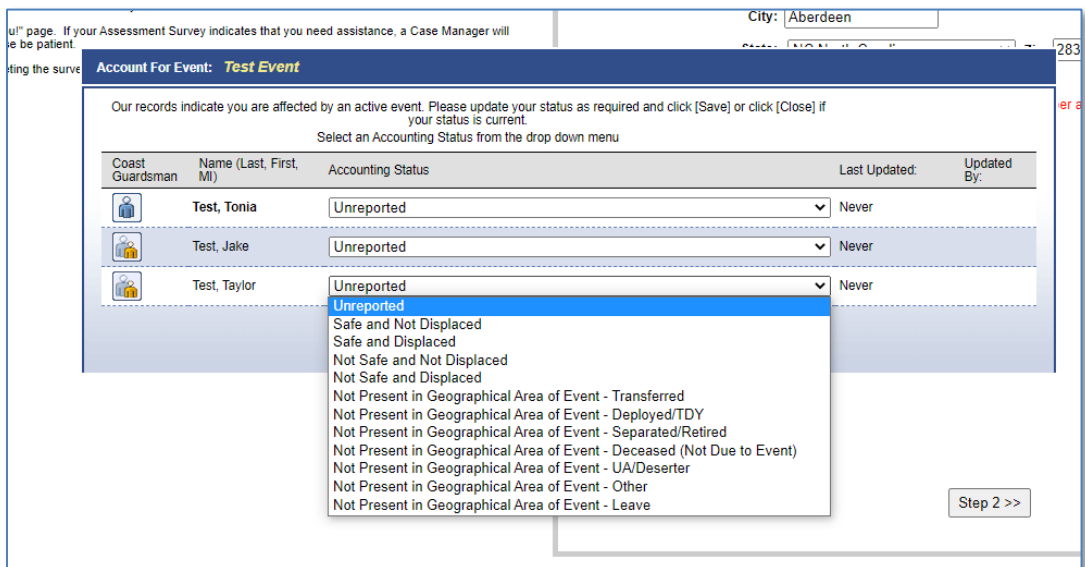
1.2 Account for Yourself and Your Dependents

The first screen that you see after you log in depends on whether you and your dependents are affected by an event, and if you are, whether the event requires that you account for yourselves.

If you and your dependents are affected by an event that requires you to account for yourselves and you have not already been accounted for, you will see the “Account for Event” window, on top of the **Home** tab, prompting you to account, e.g., for Joe Test, a dependent, as shown in the following figure:



- a. Click the **Accounting Status** list for the Sponsor and any dependents who are required to account, and a list of statuses is displayed:



- b. Click the appropriate accounting status and then click **Save** to submit the selected status. The “Account for Event” pop-up window closes, and the **Home** tab is displayed.

1.3 Home Tab

The first screen that you see after you log in depends on whether you are affected by an event, and if you are, whether the event requires that you account for yourself.

If you are not affected by an event, or if you are affected by an event that does not require you to account, the first tab you will see when you log in is the **Home** tab.

This screen will be refreshed often. Consequently, the layout and content may be different than what is shown.

1.4 Update Personal Information and Verify Account Settings

If you have not previously logged onto CGPAAS, the first thing you should do is proceed to the **My Info** tab, review the personal information contained therein, and make whatever updates may be required. Additionally, you will want to verify your Support User Type and accompanying Support User Dept ID assignment. How to review, verify, and update this information is covered in the next section.

2 My Info Tab

The **My Info** tab displays information about you, your dependents, and any events that may affect you. The information you see under the **My Info** tab will be the same and work the same as the “Full Profile” you display for any Sponsor for whom you are COR.

To add or update your information, use the **Contact Information** menu item.

2.1 Summary

When you first click the **My Info** tab, what you will see is the “Coast Guard Family Information Summary”, the same as if you had clicked the **Summary** menu item on the left side of the page.

NOTE: You will only see the **Event Information** menu item on the left and the “Event Information” pane on the right if you are currently affected by an event.

- a. Click the **My Info** tab. This will display the three panes on the right: “Contact Information”, “Work Location and “Family Information”, and if you are a Sponsor, several

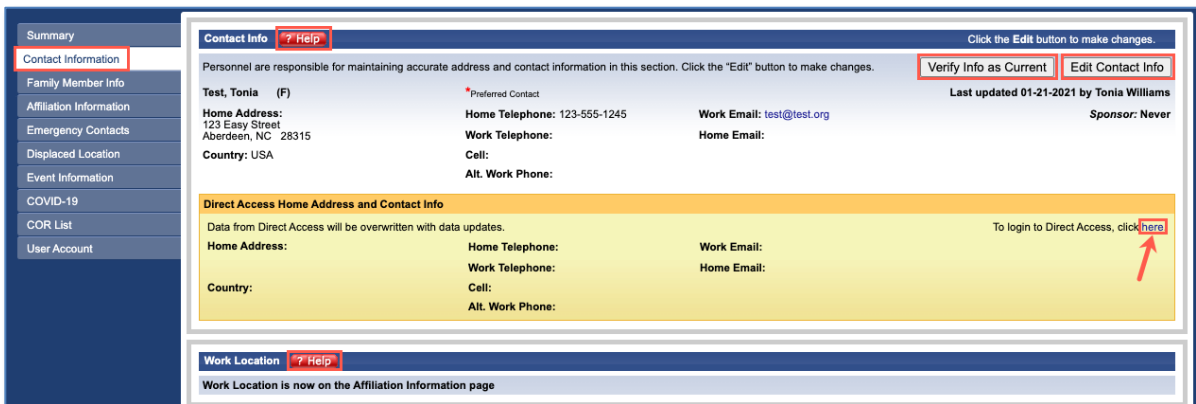
menu items on the left.



2.2 Contact Information

Under the **My Info** tab, clicking the **Contact Information** menu item on the left side of the page displays a window with the Contact Information pane. The “Contact Info” pane is covered on the next section.

NOTE: The “Work Location” pane of the **Contact Information** is now located in the “Affiliation Information” menu option.

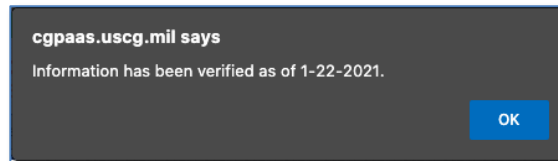


2.2.1 Contact Info

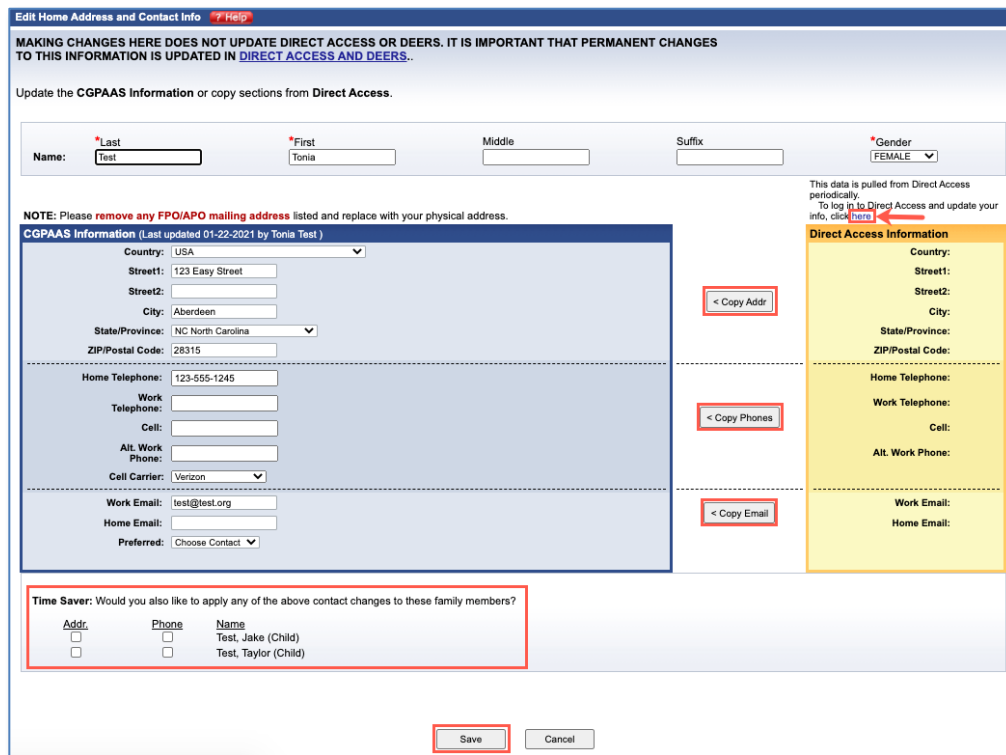
The “Contact Info” pane contains your home address and contact information. This pane also provides a snapshot of data last received from Direct Access and the date it was received (if applicable). You have the option to verify or edit this contact information:



- a. If your contact info is correct, click the **Verify Info as Current** button. This will update the name, date and timestamp displayed for last update. Current address and contact information are critical for locating and communicating with personnel and their families. This will display a message stating that your information has been verified:



- b. Click the **Edit Contact Info** button to add and/or update contact information. An "Edit" window will appear:



1. Compare the CGPAAS information in the box on the left with the latest Direct Access data in the gold box on the right.
2. If needed, edit **Last**, **First**, or **Middle** name, and **Gender** at the top of the page.
3. If needed, edit CGPAAS information seen in the left box.
4. If CGPAAS location and contact information is incorrect and the displayed Direct Access information is correct, use any of the three **< Copy** buttons to copy the displayed Direct Access data over the corresponding CGPAAS data instead of manually typing in the information.
5. If the displayed Direct Access information is incorrect or if there is none, click the **here** link above the Direct Access data, where it says, "To login to Direct Access and update your info, click here".

NOTE: Clicking the **here** link to update Direct Access information at the Direct Access site will NOT immediately update the Direct Access information displayed in CGPAAS. CGPAAS reflects the last data import received from Direct Access. Updating data in Direct Access will help future data imports from Direct Access to be accurate.
6. If your address or phone information can also be applied to any of the dependents that you have listed in the system, check the appropriate "Time Saver" check boxes to update their information as well.
7. Click the appropriate button to either **Save** or **Cancel** the updates you made.

2.3 Family Member Info

Under the **My Info** tab, clicking the **Family Member Info** menu item on the left side of the page displays a window where you can view and add information about any spouse, child, or parent that you have.

- a. Click the **Family Member Info** menu item. This will display any family members in CGPAAS:



- b. To add a family member, click the **Add Member** button. This will display the “Add Additional Family Member” window.

1. Enter at least the following fields: **Last Name**, **First Name**, **DOB** (Date of Birth), **DoD ID**, and **Address**.

NOTE: A new function in the system requires the EDIPI/DoD ID of Active Duty/SELRES family members. Currently, all DEERs listed family members of Active Duty/SELRES sponsors are updated with this information during routine data feeds from PARS.

2. Enter the other fields if you have them, though these are optional.
 3. Click the **Save** or **Cancel** button as appropriate. If necessary, you can come back later to edit the information you have entered. If you clicked the **Save** button, the information you entered will be displayed, and will be displayed the same next time you click the **Family Member Info** menu item on the left.
- c. Click the +/- toggle buttons to expand and collapse the display of Direct Access information for any family member.
- d. Click the **Verify Info as Current** button for a particular family member to update the name, date and timestamp displayed for last update. Current address and contact information are critical for locating and communicating with family members.
- e. To remove a family member (i.e. due to divorce or death), click the **Remove** button.
- f. Click the **Edit** button for a particular family member to open the “Edit Family Member” window. This window is similar to the window displayed when you click the **Edit Contact Info** button to edit or enter information about yourself, described in step b. of section 2.2.1

2.4 Affiliation Information

Under the **My Info** tab, the **Affiliation Information** menu displays information about where you work:

- a. If your work location is correct, click the **Verify Info as Current** button. This will update the name, date and timestamp displayed for last update.
- b. If necessary, click the **Edit Work Location** button to edit. The “Edit Person’s Work Location Info” window appears:

- c. Enter or edit any information, as necessary.
- d. If your work location on the left is incorrect or incomplete and the displayed Direct Access data is correct, click the **< Copy Work Location** button to copy the Direct Access data over the corresponding CGPAAS data instead of manually typing in the information.
- e. If the displayed Direct Access information is incorrect or there is none, click the **here** link above the Direct Access data, where it says, “To login to Direct Access and update your info, click here”.

NOTE: Clicking the **here** link to update Direct Access information at the Direct Access site will NOT immediately update the Direct Access information displayed in CGPAAS. CGPAAS reflects the last data import received from Direct Access. When you update data in Direct Access you help subsequent data imports from Direct Access into CGPAAS to be accurate.

- f. Click the **Save** or **Cancel** button, as appropriate.

2.5 Emergency Contacts

Under the **My Info** tab, the **Emergency Contacts** menu item displays the “Alternate Contact” pane. This contains location and contact information for one or more people who can serve as a Point of Contact (POC) in case you cannot be reached:

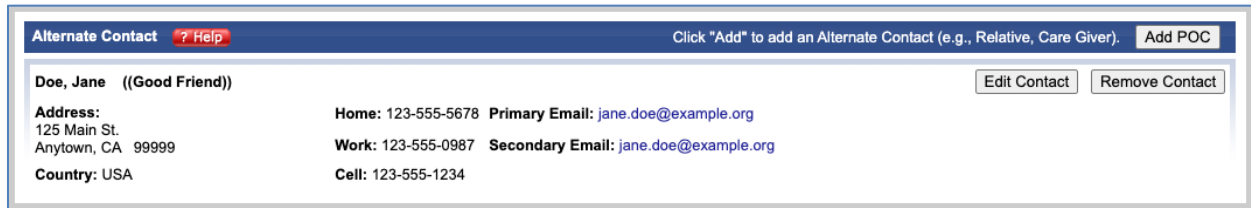
You can always add a POC, whether there are POCs already listed or not.

- a. Under the My Info tab, click the **Emergency Contacts** menu item on the left. This will display the “Alternate Contact” pane:

- b. In the “Alternate Contact” pane, click the **Add POC** button to add a point of contact, if desired. This will display the **Add Point of Contact** window:

1. Enter the name, address, and contact information for the new alternate POC and then click the appropriate button to either **Save** or **Cancel** your updates. Clicking **Save**

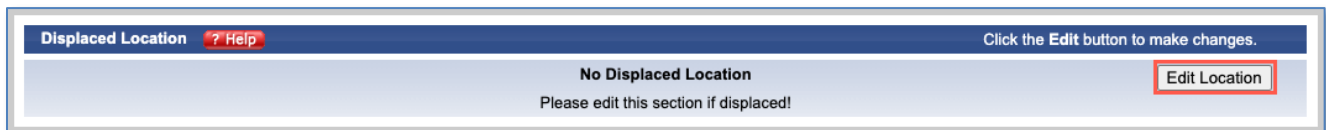
will close the “Add Point of Contact” window and display the new POC on the “Alternate Contact” pane.



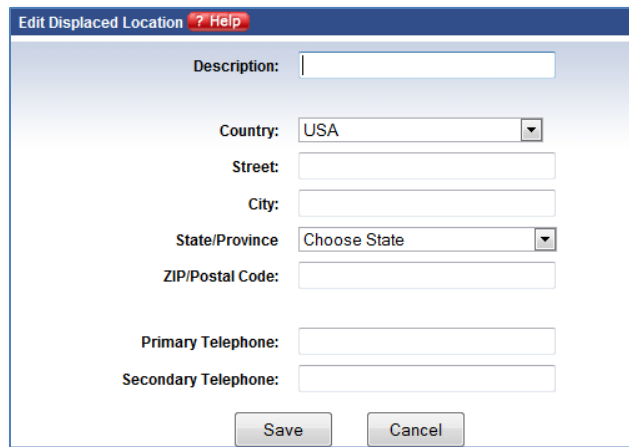
- c. Click the **Edit Contact** button for a specific POC to modify the information, as necessary.
- d. Click the **Remove Contact** button for a specific POC, to delete that POC.

2.6 Displaced Location

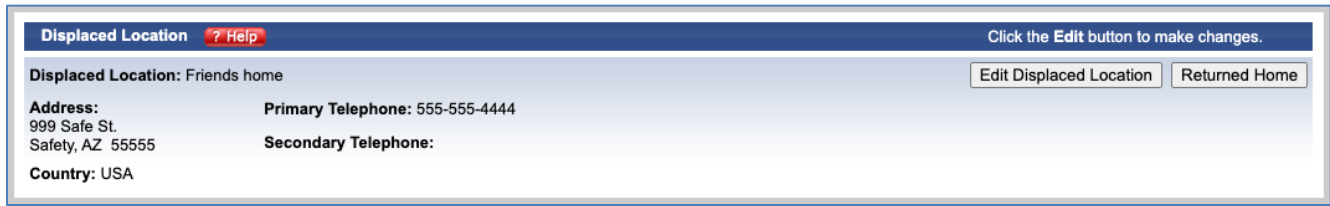
Under the **My Info** tab, clicking the **Displaced Location** menu item on the left should display the address that you evacuated to if affected by an event. If there is no displaced location, this will be indicated as shown here:



- a. If necessary, click the **Edit Location** button in the top-right corner of the “Displaced Location” pane. The “Edit Displaced Location” page appears:



- b. Add and/or edit your Displaced Location information as required.
- c. Click the appropriate button to either **Save** or **Cancel** the updates you made. If you clicked **Save**, the “Displaced Location” pane will display the new information:



1. If necessary, click the **Edit Displaced Location** button at any time to update this information.
2. Click the **Returned Home** button when you are no longer in a displaced location.

2.7 Event Information

If you have been affected by an event, you will see an **Event Information** menu item under the **My Info** tab. You will not see this menu item if you have not been affected by an event. Clicking the **Event Information** menu item will display a window with important information regarding this event.

- a. Click the **Event Information** menu item. The “Event Information” page appears:






This page consists of three panes all related to the event, covered in the following sections.

2.7.1 Event Information - Displaced Location

The “Displaced Location” pane is a duplicate of the “Displaced Location” page accessed from the **Displaced Location** menu item. See section 2 for more information.

2.7.2 Accounting Status

The “Accounting Status” pane contains the accounting statuses for you and all your dependents in the system for a particular event. In addition, it shows when the status was last updated, and by whom.

Accounting Status for User Guide Test			
Click the Edit button to make changes Edit			
Name (Last, First Middle):	Accounting Status:	Last Updated:	Updated By:
 Test, Tonia	Safe and Displaced	01-22-2021 02:24 PM PST	Tonia Test
 Test, Jake	Safe and Displaced	01-22-2021 02:24 PM PST	Tonia Test
 Test, Taylor	Unreported	Never	

- a. Click the **Edit** button to update the accounting status of anyone necessary.

2.7.3 Other POCs

The content in the “Other POCs” pane of the window displayed when you click the **Event Information** menu item is a duplicate of the content in the “Alternate Contact” pane, displayed when you click the **Emergency Contacts** menu item. If you add, remove, or change any information in either pane, the change will also be seen in the other pane. See section 2.5 for more information.

2.8 COVID-19

Under the **My Info** tab is the **COVID-19 Status Tracker** menu item allows you to update your current status in the event of a pandemic-related event. Once Status Tracker is selected, you will see yourself and dependents (if any) listed under the Name column, your Personnel Status, and Work Status as seen in the example below:

COVID-19 Family Status ? Help			
Name	Personnel Status	Work Status	
Tonia Test	Unreported	Unknown	<input type="button" value="Update"/>
Jake Test	Unreported	Unknown	<input type="button" value="Update"/>
Taylor Test	Unreported	Unknown	<input type="button" value="Update"/>

To update your status, click on the Update button aligned with the family member you wish to update. Next, you will see the following menu of selections:

Update Current Status

Tonia Test

Please set your current Personnel Status and Work Status below.

If you are unsure of which Personnel Status to choose, take a moment to review the [Personnel Status Definitions](#).

Some Personnel Statuses require additional information. If you choose one of those statuses, additional fields will appear for you to fill.

Personnel Status:
 Unreported
See [Personnel Status definitions](#) for more information.

Work Status:
 Unknown
 Working On-Site
 Working Off-Site
 Not Working
See [Work Status definitions](#) for more information.

Note:
 [Text area for notes]

In this pop-up screen, you can update your **Personnel Status**, **Work Status**, and input additional notes. Under **Personnel Status**, you will have the following options:

- **Unreported** - No status set (default status)
- **Unaffected** - Member has not been diagnosed with communicable disease or knowingly exposed to someone who has been diagnosed with it.
- **Quarantined** - Member was in direct contact with infectious secretions of a COVID-19 case, or close contact (>15 minutes) to a COVID-19 case WITHOUT PPE, or member displays COVID-19 symptoms and member has been separated from the general population while awaiting diagnosis or test results.
- **Isolated** - Member either 1) Positive COVID-19 test or 2) Diagnosed with COVID-19 by healthcare professional. Must include one of the following notes, "1. Positive test" or "2. Clinically diagnosed".
- **Hospitalized** - Member has been admitted to the hospital due to COVID-19. Must include one of the following notes, "1. Positive COVID-19 test" or "2. Clinically diagnosed".
- **Released** - Prior isolated or hospitalized member, who has recovered and been released by a healthcare professional. This status does NOT apply to individuals who are released from Quarantine. Must include one of the following notes, "1. Positive COVID-19 test" or "2. Clinically diagnosed".
- **Deceased** - A person who is either known to have died, determined to have died on the basis of conclusive evidence, or declared to be dead on the basis of an presumptive finding of death, due to COVID-19. This option only used by HQ staff; casualty affairs staff.

Certain **Personnel Status** choices require additional information. If you select that you have a **Confirmed Case**, are a **Person Under Investigation**, or have **Restricted Movement**, you will be prompted to selected whether you are **At Home** or **Not at Home**:

Personnel Status:
 Quarantined
 See [Personnel Status definitions](#) for more information.

Location:
 At Home Not at Home
 The status you chose requires a location.

Work Status:
 Unknown
 Working On-Site
 Working Off-Site
 Not Working
 See [Work Status definitions](#) for more information.

Note:

Under the **Work Status** area, you will have the option to choose from the following selections:

- **Unknown - Unknown**
- **Working On-Site** - Member spends a majority (50% or more) of work time on-site at their normal work location (including normal telework), not using situational telework or weather & safety leave.
- **Working Off-Site** - Member spends a majority (50% or more) of work time away from their normal work location, using situational telework.
- **Not Working** - Member is unable to work at normal work site and unable to telework.

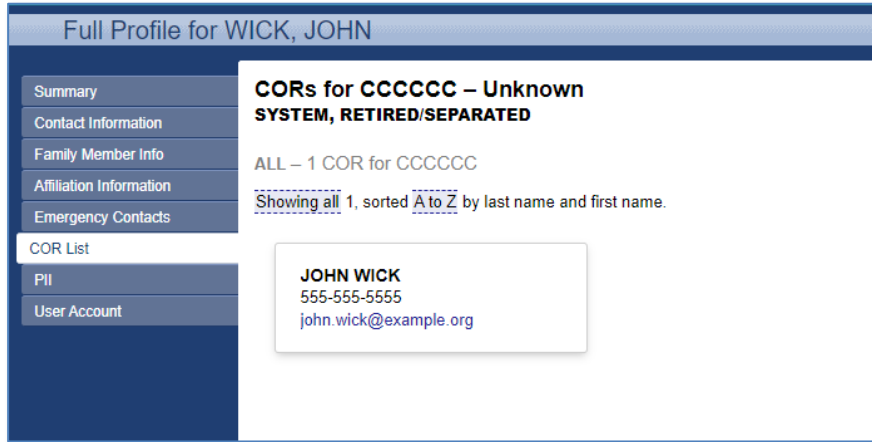
NOTE: You can select the highlighted terms “**Personnel Status Definitions**” and “**Work Status Definitions**” to see these terms and definitions.

Once you have made your selections, select **Update**. Your status will be recorded and updated on the screen like in the example below:

COVID-19 Family Status ? Help			
Name	Personnel Status	Work Status	
Tonia Test	Quarantined: At Home	Not Working	<input type="button" value="Update"/>
Jake Test	Unreported	Unknown	<input type="button" value="Update"/>
Taylor Test	Unreported	Unknown	<input type="button" value="Update"/>

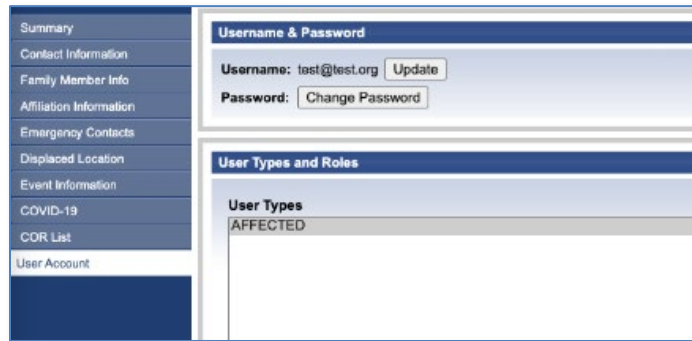
2.9 COR List

Under the **My Info** tab is the **COR List** menu item. The COR List menu item displays a current point of contact list of the CORs for the Sponsor's assigned Dept ID as shown in the Affiliation Information menu item.

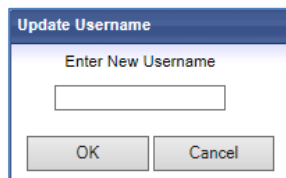


2.10 User Account

Under the **My Info** tab, clicking the **User Account** menu item on the left side of the page displays your Username, Password, and User Types. This is also the place where you can update your username and change your password.



- a. Click the **Update** button to change your username. A window will pop up where you will enter a **new username**:



- b. Enter a **new username** and then click **OK**. An informational message will let you know your username has been updated and your username will be updated in the User Account window:



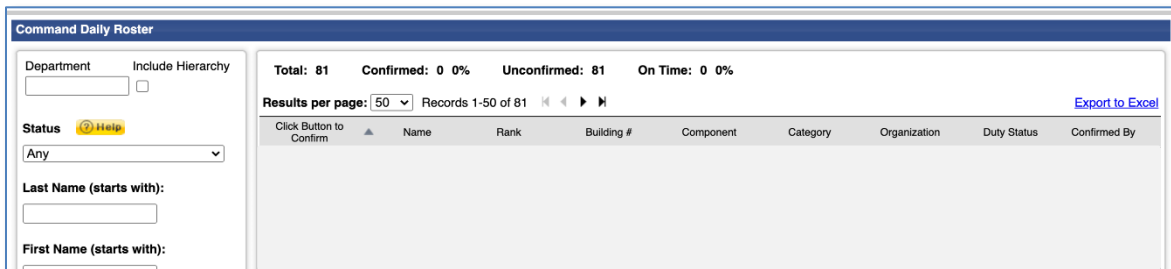
- c. Click the **Change Password** button to change your password. You will have to enter your old password, to be able to change it:

NOTE: New password must be at least 15 characters with no spaces or slashes, must contain at least one uppercase letter, one lowercase letter, one special character, and one number.



3 Muster Tab

Under the **Muster** tab, the **Daily Muster** tab allows you to update *your* muster status. The **Command Muster** tab allows you to display statistics about, and lists of, who has and has not mustered within a particular department for which you are COR. These statistics and lists are based on search criteria provided. The first screen that you will see in the “Command Daily Roster” page displays all the records of participants for whom you are responsible:



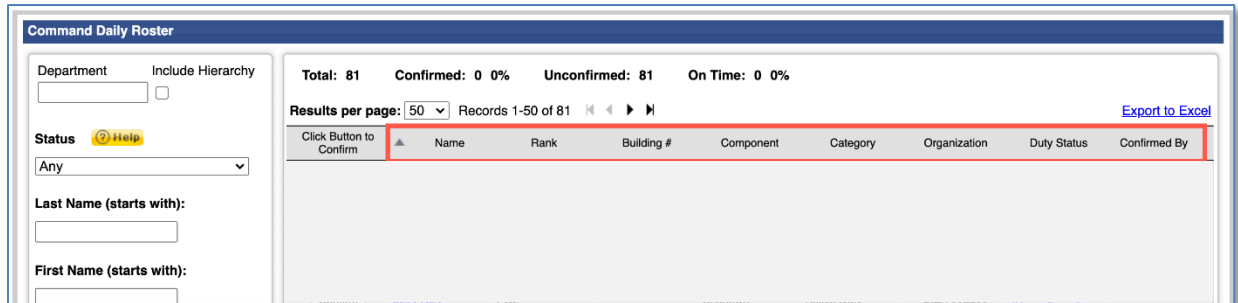
3.1 Affecting the List of Records Displayed

To affect the list of records that you want to display, you can easily sort the list of records.

- a. To find specific records, enter various search and filter criteria, and then click the **Filter**

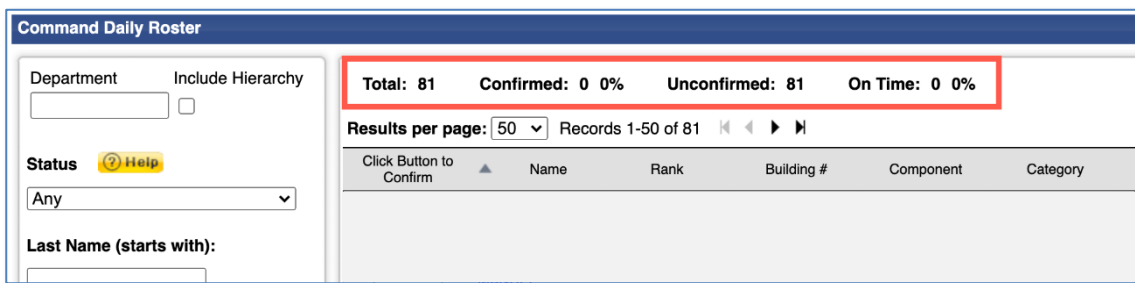
button. Cases matching ALL the filters will be displayed.

- b. If desired, click the column headers any time to sort the listed records based on that column’s values. Click again to reverse the sort.



3.2 Command Muster Totals

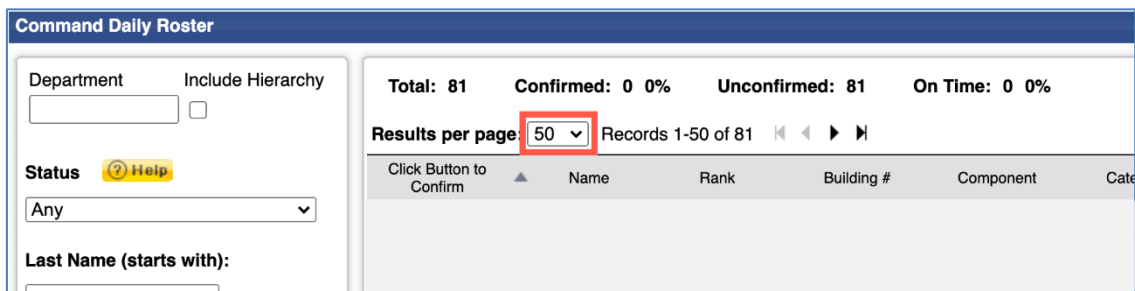
At the top of the “Command Muster” page there is a summary of the total numbers displayed on the page; these totals include all the personnel for whom you are the COR.



Here you will see the total number of personnel, total number and percentage of personnel who have confirmed, the total number who are still unconfirmed, and the number and percentage of those who confirmed on time, which is designated by leadership at the department where these personnel are assigned.

3.3 Command Muster - Results Per Page

The **Results per page** button allows you to choose how many results are seen in a single page. The default is 50, but you may choose to see 100 or 250 results per page instead.



3.4 Command Muster - Search and Filter Criteria

Under the **Command Muster** tab there are search and filter criteria for you to use to narrow

the search for personnel for whom you are COR. Search fields include **Department**, **Last Name**, **First Name**, and **EDIPI**. Drop-down lists include **Status**, **Component**, and **Designation**. Checkboxes include **Show Confirmed**, **Show Unconfirmed**, and **Include Hierarchy**, each of which is checked by default.

- 3.4.1 Click the **Filter** button without specifying any search criteria and a list will be displayed of all personnel for whom you are COR, including both Confirmed and Unconfirmed records as well as all records of personnel in any subordinate commands. Records will be displayed with the name of the person, rank, organization, and other related information.

To narrow your search, click the **Find** button after entering one or more search and filter criteria. A list will be displayed of only those personnel who match all entered criteria and for whom you are COR. **NOTE:** The **Show Unconfirmed** checkbox is only relevant when using "Any" in the **Confirmed Status** drop-down filter.

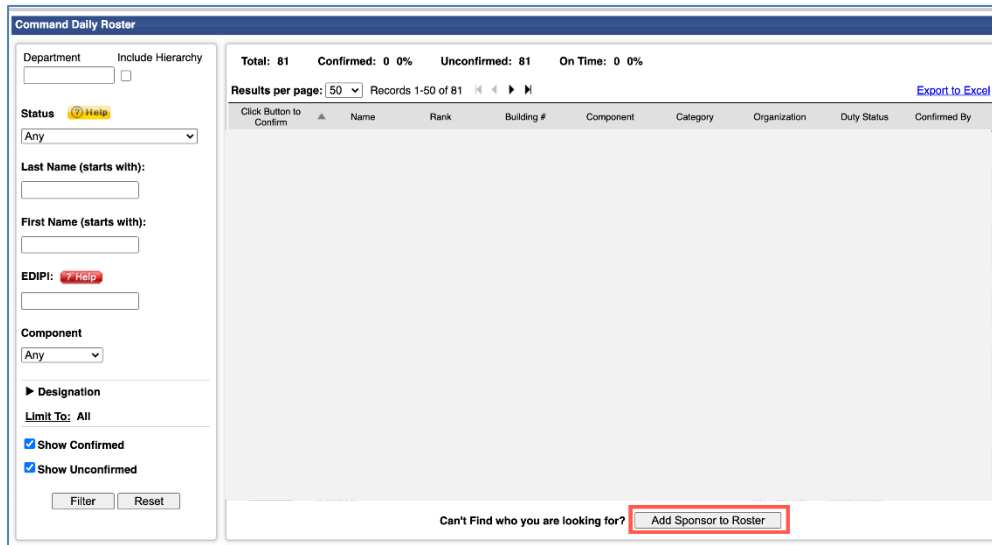
3.5 Command Muster - Export to Excel Button

To save your results in an Excel spreadsheet, click the **Export to Excel** button. The

spreadsheet provides an easy method to sort and filter the data.

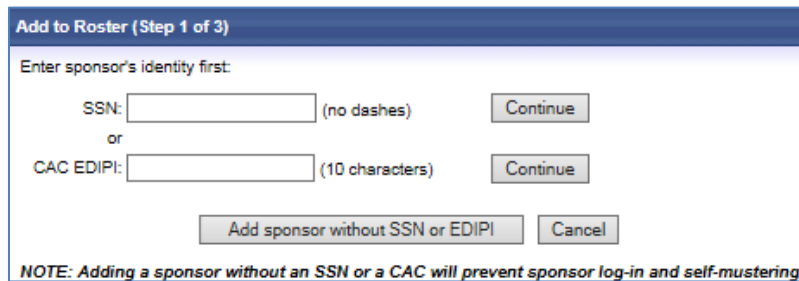
3.6 Command Muster - Add sponsor to Roster Button

From the **Command Muster** tab, on the “Command Daily Roster” page, the **Add sponsor to Roster** button brings up a window that allows a COR to add someone new to CGPAAS.



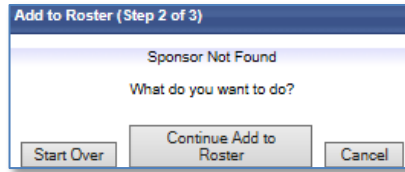
NOTE: Before adding a person, it is important to search for the person using the Command Muster search filters to avoid adding someone that may already exist in CGPAAS.

3.6.1 Under the **Command Muster** tab, on the “Command Daily Roster” page click the **Add sponsor to Roster** button. The screen for step 1 appears:



3.6.2 If you know the SSN or CAC EDIPI, enter one of these and then click the corresponding **Continue** button. The SSN should NOT include dashes. The CAC EDIPI can be found on the back of the person's CAC.

NOTE: One of these credentials should be used if possible to avoid the possibility of adding a second record for a person that already exists in the CGPAAS database. This will display step 2 in adding someone:



- 3.6.2.1 Click the **Start Over** button to go back to step 1 of adding someone or click the **Continue Add to Roster** button to go to step 3 of adding someone (shown next) with the SSN or EDIPI pre-populated.
- 3.6.3 If the person does not have an SSN or EDIPI, you can still add the person, but they will not be able to log in and account for themselves, so you will have to account for this person. In this case, click the **Add sponsor without SSN or EDIPI** button. This will go straight to step 3 of adding someone:

- 3.6.4 Enter the person's Last Name, First Name, and other required fields, which are marked with *.
- 3.6.5 Click the **DOB Day, Month, and Year**, and the **Component and Designation** drop- down lists to select the appropriate values.
- 3.6.6 Click the **Department Assigned Look Up** button to select the Department to which the person is assigned. This will display a window for you to choose a Department:

- 3.6.6.1 To display a complete list of all organizations to where you can move the person, click the **Search** button without selecting any Tiers.
- 3.6.6.2 To narrow your search, click the **Tier** drop-down lists and select a value and/or the **Name** of the organization or the Code, and then click **Search**. Select a Department from the list, which is displayed to add the person to, and then click the **Select** button.
- 3.6.7 Optionally, enter any Current Contact Information.
- 3.6.8 Click the **Save** button, or, to add another person, click the **Save and Add Another** button. Any time you use the **Find** button in the future, the newly created record may now be displayed, depending on your search criteria.

3.7 Command Muster - Confirmation Column

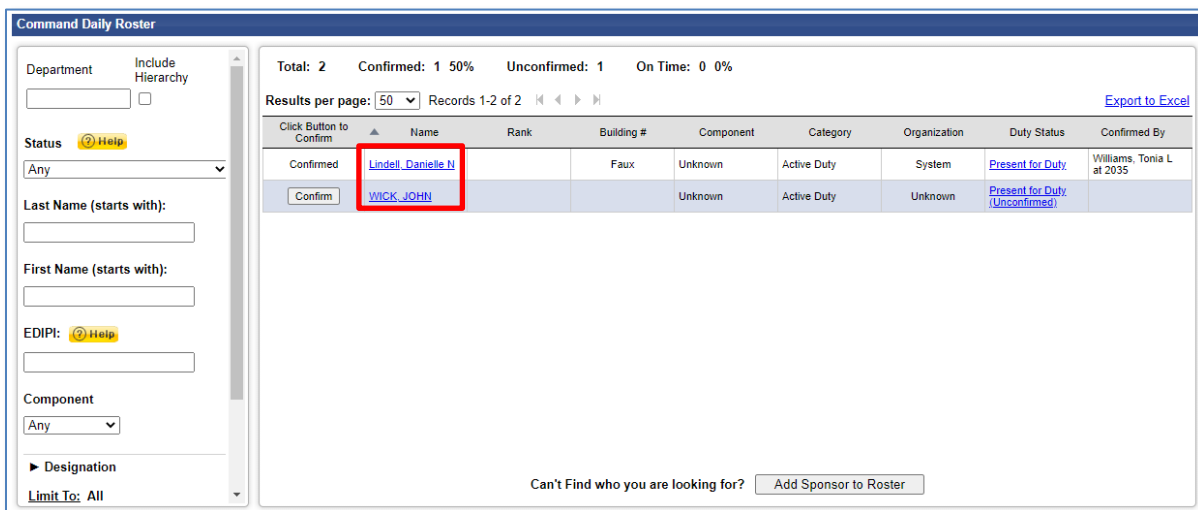
On the “Command Daily Roster” page, under the **Command Muster** tab, the **Confirmation** column either shows “Confirmed” for those personnel who have been confirmed, or it shows the **Confirm** button which allows you to confirm the muster status for someone.

- 3.7.1 To confirm your own, or someone else’s, status, click the **Confirm** button. After you click the **Confirm** button for someone, the **Confirmed** button will change to display “Confirmed”.

3.8 Command Muster – Name Column and Full Profile

On the “Command Daily Roster” page, under the **Command Muster** tab, the names in the **Name** column are links which you can click to see someone’s full profile, along with 4 or 5 menu items on the left side.

- 3.8.1 To view an individual’s full profile, click the person’s name under the **Name** column. This will display the “Coast Guard Family Information Summary” page:



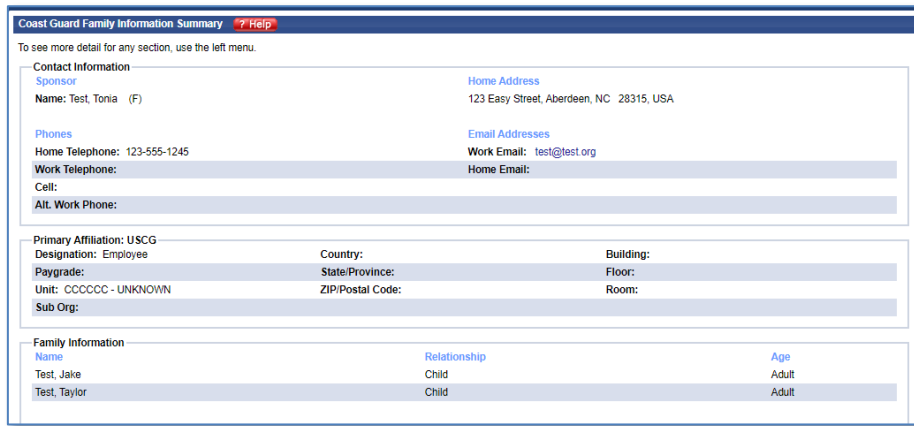
NOTE: Only people who are affected by an event will have the **Emergency Contacts** and **Event Information** menu items displayed on the left side of their profile or the “Event Information” pane in the “Summary”.

3.8.1 Summary

When you click a person's name, you will see a **Summary** menu item to the left of the "Full Profile" page. Clicking this **Summary** menu item will display the same **Full Profile** you see when you first click a person's name. Information displayed is the person's personal and work contact information and, if the person is affected by an event, the Event Information. To add or update the information, use the **Contact Information** menu item described in the next section.

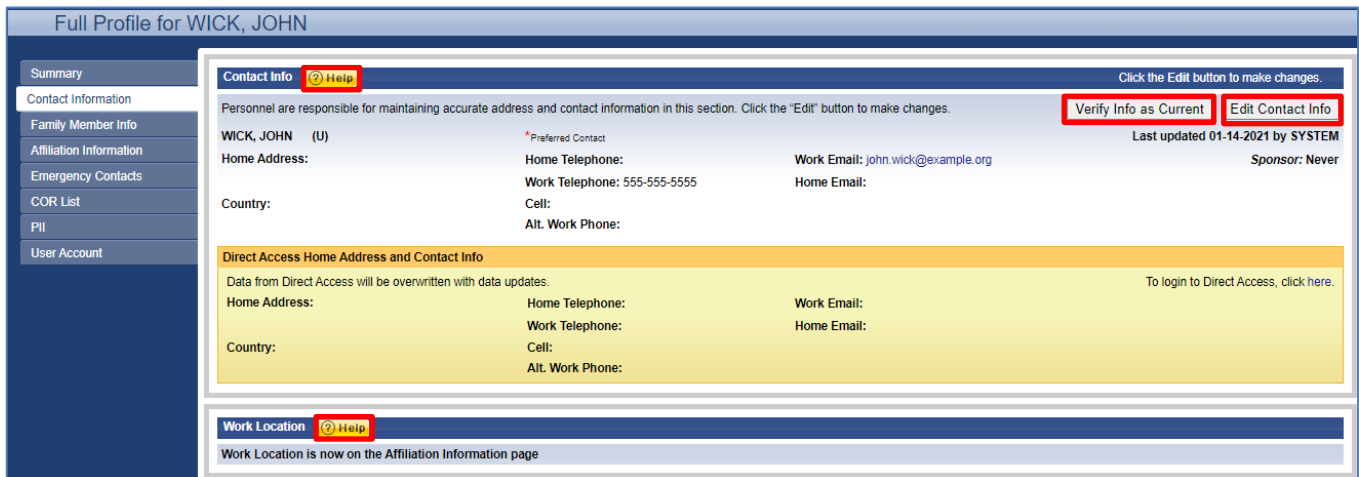
3.8.2 Contact Information

Clicking the **Contact Information** menu item on the left side of the "Full Profile" page displays a window with two panes. Each pane has a button to verify that the current information is correct and to edit the information, as well as a **Help** button:



3.8.2.1 Individual's Contact Info

The "Contact Info" pane of an individual's full profile, displayed when you click the **Contact Information** menu item, contains a person's home address, and contact information. This works the same as the "Contact Info" pane for your own account, under the **My Info** tab, when you click the **Contact Information** tab, covered in section 2.2.



3.8.2.2 Work Location

The "Work Location" pane of an individual's full profile displayed when you click the **Affiliation Information** menu item displays their work location. This works the same as the "Work Location" pane for your own account, under the **My Info** tab when you click the **Affiliation Information** tab, covered in section 2.4.

3.8.3 Displaced Location

If an individual has been affected by an event, they will have a **Displaced Location** menu item on the left side of their Full Profile. (If they have not been affected by an event, they will not have this menu item.) Clicking the **Displaced Location** menu item will contain the address that a person evacuated to if affected by an event. This works the same as the **Displaced Location** menu item displayed with your own account, under the **My Info** tab, covered in section 2.6.

3.8.4 Emergency Contacts

If an individual has been affected by an event, they will have an **Emergency Contacts** menu item on the left side of their Full Profile. (If they have not been affected by an event, they will not have this menu item.) Clicking the **Emergency Contacts** menu item within an individual's full profile will display location and contact information for one or more people who can serve as a Point of Contact (POC) in case a person cannot be reached. This works the same as the **Emergency Contacts** menu item displayed with your own account under the **My Info** tab, covered in section 2.5.

3.8.5 User Account

Clicking the **User Account** menu item on the left side of an individual's "Full Profile" page displays their Username and User Types and allows you to update their username or password. This works the same as the **User Account** menu item displayed with your own account under the **My Info** tab, covered in section 2.11.

3.9 Command Muster – Duty Status Columns

The status in the **Duty Status** column is also a link which, when clicked, brings up a window allowing you to muster for the person on the same line as the status you clicked. Each day at midnight, everyone's muster status reverts to "Present for Duty – Unconfirmed" so every day personnel must be accounted for. To muster for someone else, you take the same steps as you do in your own daily muster.

- 3.9.1 Enter any applicable search criteria and then click the **Find** button. This will display the "Command Daily Roster" page with a list of personnel and their duty status in the **Duty Status** column:

Command Daily Roster

Department Include Hierarchy

Status [Help](#)

Any

Last Name (starts with):

First Name (starts with):

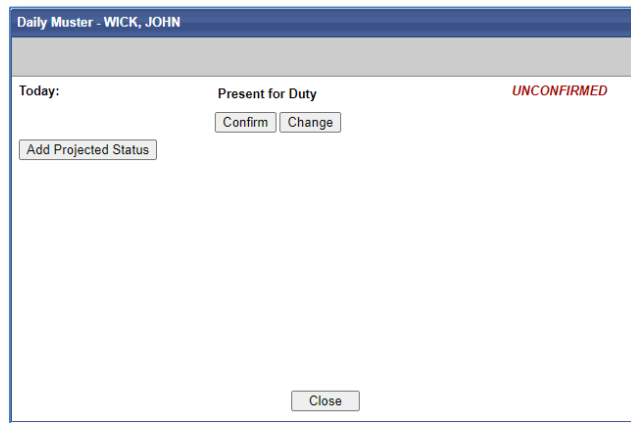
EDIPI: [Help](#)

Total: 81 Confirmed: 0 0% Unconfirmed: 81 On Time: 0 0%

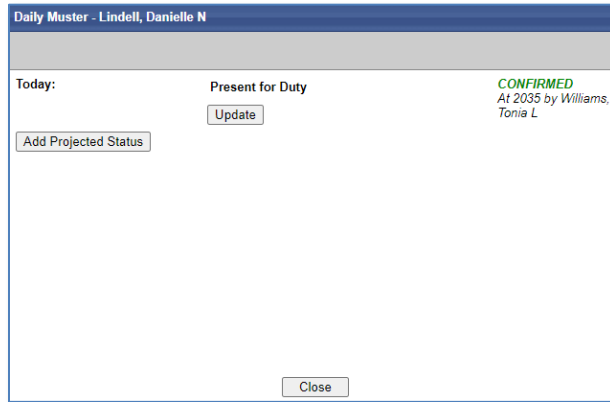
Results per page: 50 Records 1-50 of 81 [Export to Excel](#)

Click Button to Confirm	Name	Rank	Building #	Component	Category	Organization	Duty Status	Confirmed By
<input type="button" value="Confirm"/>		PO2		Unknown	Active Duty	MSU MORGAN CITY 007780	Present for Duty (Unconfirmed)	
<input type="button" value="Confirm"/>		MOO2E	EOC	Unknown	Active Duty	MSU MORGAN CITY 007780	Present for Duty (Unconfirmed)	
<input type="button" value="Confirm"/>		MOO1E	232	Unknown	Active Duty	MSU MORGAN CITY 007780	Present for Duty (Unconfirmed)	
<input type="button" value="Confirm"/>		PO2		Unknown	Active Duty	MSU MORGAN CITY 007780	Present for Duty (Unconfirmed)	
<input type="button" value="Confirm"/>		PO2		Unknown	Active Duty	MSU MORGAN CITY 007780	Present for Duty (Unconfirmed)	
<input type="button" value="Confirm"/>		PO2		Unknown	Active Duty	MSU MORGAN CITY 007780	Present for Duty (Unconfirmed)	

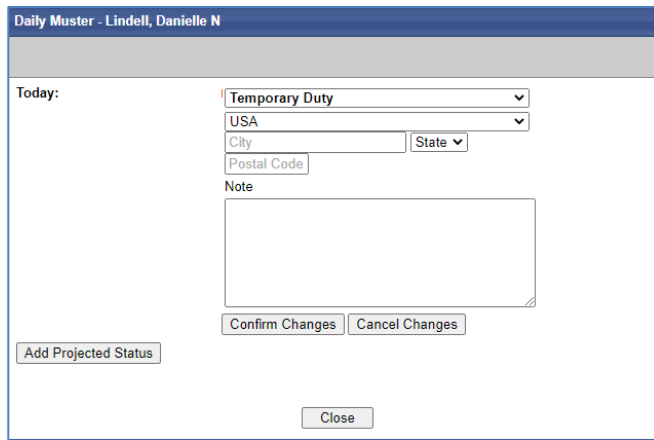
- To mark someone as Present for Duty, click the **Confirm** button on the same line as their name. This will update that person’s duty status in the “Duty Status” column and indicate in the “Confirmed By” column that you confirmed the person and what time.
- You can also mark someone as Present for Duty by clicking the status in the “Duty Status” column. This will display the following screen:



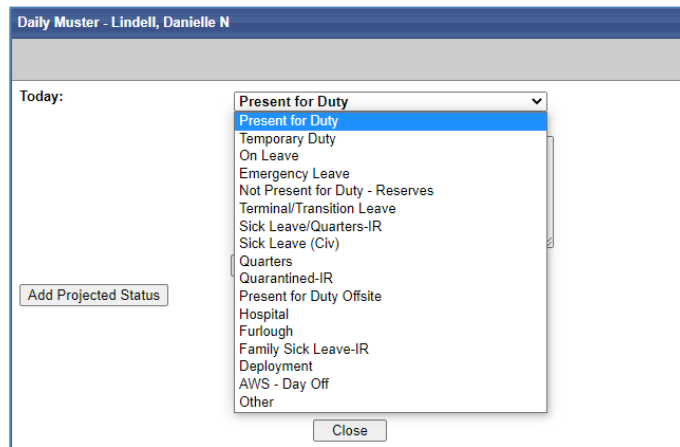
- Click **Confirm**. This will update that person’s duty status in the “Duty Status” column and indicate in the “Confirmed By” column that you confirmed the person and what time.
- To change a person’s current muster status, or to add a person’s status for future dates click the status in the “Duty Status” column. You can do this no matter what their current Duty Status is. A screen similar to the following will be displayed:



1. To change a person's current muster status, click the **Update** button. A screen similar to the following is displayed:



- i. Click the top drop-down menu item where, the current status is displayed, e.g. "On Leave" in the example above. This will display a list of status selections to choose from:



- ii. Depending on your selection, you may be required to enter additional information. If necessary, change the **Country**, and enter the **City**, **State** and

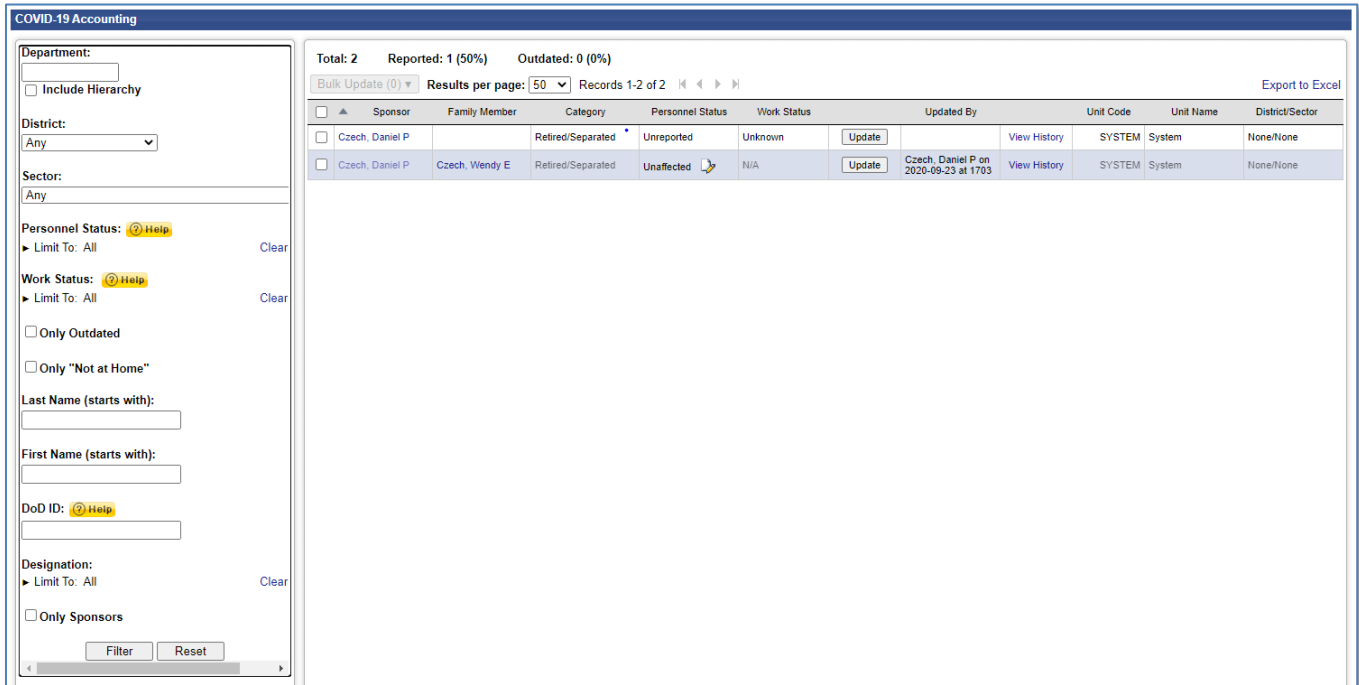
Postal Code where you are located.

- iii. Enter a Note if desired.
 - iv. Click the **Confirm Changes** button or **Cancel Changes** button, as applicable.
2. To add a person's status for future dates, if applicable, click the **Add Projected Status** button. This will display a screen similar to the following:

- i. Click inside each of the 2 date boxes and a calendar will appear where you can select the “from” and “to” dates of a person's projected status.
 - ii. If necessary, click the drop-down list next to **Projected** to change their projected muster status. Select the projected muster status.
 - iii. If prompted, enter the **Country**, **City** and/or **State** where they will be, and, if desired, a note.
 - iv. Click the **Save Changes** button or **Cancel Changes** button, as applicable.
- d. Click the **Close** button when finished. This will record the person's muster status as “Confirmed” for the current day, along with a time stamp and your name as the person confirming the status.

4 COVID-19 Tab

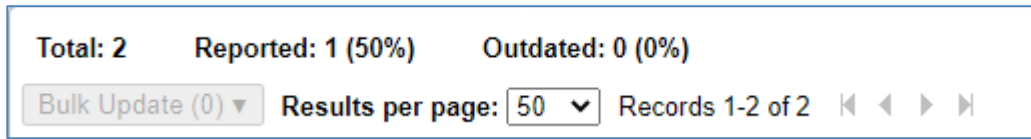
The **COVID-19** tab allows you to display statistics about, and lists of, who has and has not reported their status within a particular department for which you are COR. These statistics and lists are based on search criteria provided. The first screen that you will see in the “COVID-19 Reporting” page. This page displays all the records of participants for whom you are responsible:



To affect the list of records that you want to display, you can easily sort the list of records.

1. To find specific records, enter various search and filter criteria, and then click the **Filter** button. Personnel matching ALL the filters will be displayed.
2. If desired, click the column headers any time to sort the listed records based on that column’s values. Click again to reverse the sort.

At the top of the “**COVID-19**” page, there is a summary of the total numbers displayed on the page; these totals include all the personnel for whom you are the COR. Here you will see the total number of personnel, total number and percentage of personnel who have reported, and the total number who are still unreported (outdated).



To report for the personnel of which you are responsible, select the “Update” button right of the “Work Status” column. You may also view the reporting history of personnel within your purview. Select “View History” to see a by-date breakdown of a user’s reporting statuses.

Reference section 2.8 for directions on reporting and a breakdown of Personnel Status and Work Status definitions.

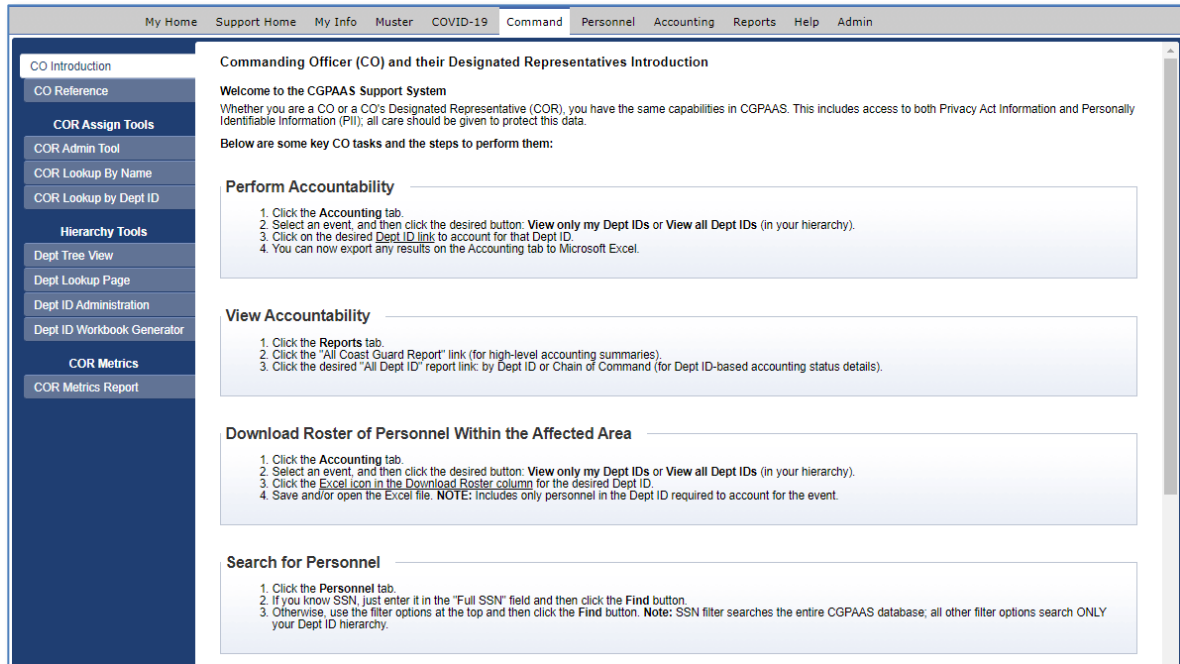
5 Command Tab

The **Command** tab is the place where the CO or the COR can assign and remove a COR and view a Dept ID hierarchy. The first page you will see under the **Command** tab is the same one that appears when you click the **CO Introduction** menu item on the left. In

addition to this menu item, you will see several other menu items described in the following sections.

5.1 CO Introduction

The **CO Introduction** provides a list of key CO tasks and the steps to perform them.



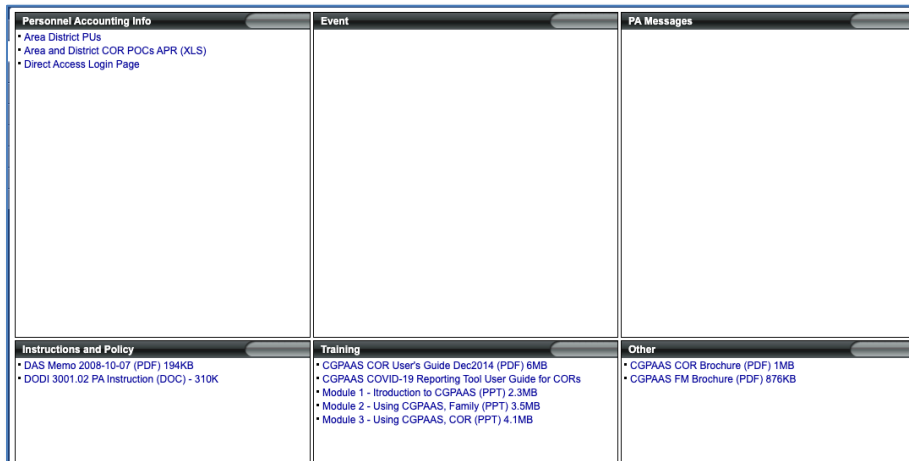
- Click the **Command** tab. The "CO Introduction" appears:
- Read the first page you see to understand the capabilities and responsibilities of a CGPAAS CO user and their Designated CO Representatives.
- Click the menu items on the left to access additional capabilities described in the following sections.
- To return to the "CO Introduction" page at any time, click the **CO Introduction** menu item on the left of the page.

5.2 CO Reference

The **CO Reference** menu item under the **Command** tab left displays several panes, each labeled with a specific reference category.

If you are a CQHQ user type, you can also access this page by clicking the **CO Reference** menu item on the left under the **Dept ID Admin** tab,

- 5.2.1 Under the **Command** tab, click the **CO Reference** menu item on the left. This displays a page with several panes with different types of information. The exact content will change from time to time and may look somewhat different from the following:



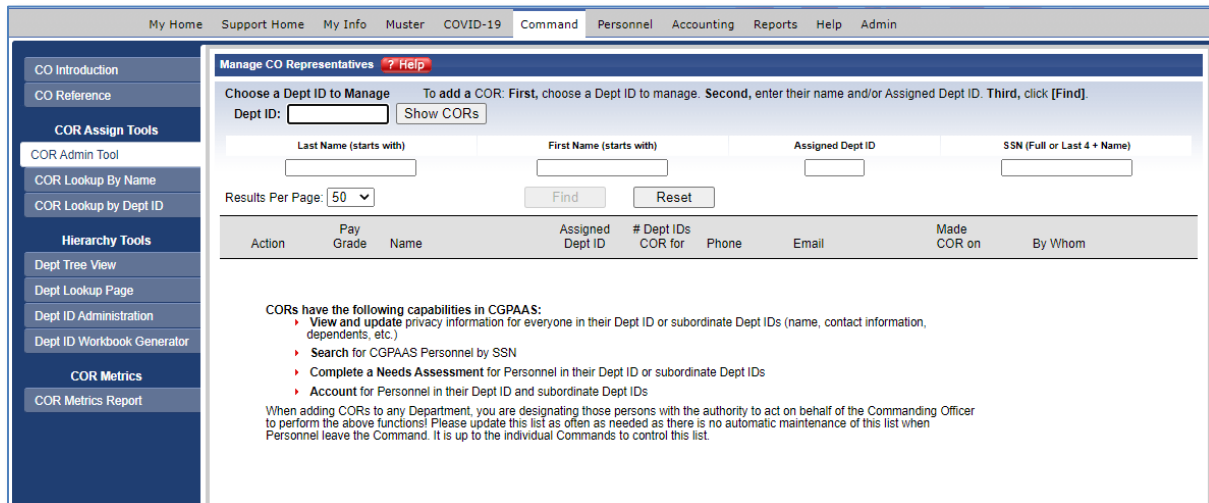
5.2.2 To open or save a reference document listed in the panes, click the link to it.

5.3 View, Add, and Remove CORs for a Department ID

Under the **Command** tab, the **COR Admin Tool** menu item on the left, allows you to view a list of CORs assigned to represent a department for which you are responsible and to add or remove a COR for that department.

To see which departments you are responsible for, use the **COR Lookup by Name** menu item on the left, described in section 3.5.

5.3.1 Under the **Command** tab, click the **COR Admin** menu item on the left. This will display the “Manage CO Representatives” window:



5.3.2 Enter a **Dept ID** in the **Dept ID** field. It must be 6 characters, so enter leading zeroes, if necessary, e.g. 004311. As you type the Dept ID, the system will auto-complete the values for you.

5.3.3 Click the **Show CORs** button to see a list of CORs assigned to that Dept ID:

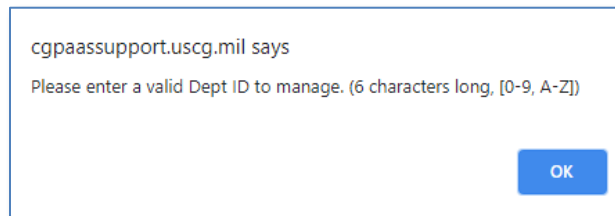
The screenshot shows the 'Manage CO Representatives' interface. At the top, there is a header 'Manage CO Representatives' with a help icon. Below the header, there is a section 'Choose a Dept ID to Manage' with a 'Dept ID' field containing 'CCCCCC' and a 'Show CORs' button. To the right, there is a note: 'To add a COR: First, choose a Dept ID to manage. Second, enter their name and/or Assigned Dept ID. Third, click [Find].'

Below this, there are four search filter fields: 'Last Name (starts with)' with 'Test', 'First Name (starts with)', 'Assigned Dept ID', and 'SSN (Full or Last 4 + Name)'. There are 'Find' and 'Reset' buttons. Below the filters, it says 'Results Per Page: 50' and 'Total Results: 5 | Page 1 of 1'.

The main table has the following columns: Action, Pay Grade, Name, Assigned Dept ID, # Dept IDs COR for, Phone, Email, Made COR on, and By Whom.

Action	Pay Grade	Name	Assigned Dept ID	# Dept IDs COR for	Phone	Email	Made COR on	By Whom
Add	PO1	TEST, CHRISTINE J.	004708	0	2125154199	Christine.J.Test@uscg.mil		
Remove	WO2	Test, Tonia	CCCCCC	1		Tonia.test@email.com	2021-10-02 23:50	Williams, Tonia L

5.3.4 If you enter an invalid Dept ID, the following message will be displayed:



5.3.5 If you type a Dept ID that does not exist, you will see the following message:

The Dept ID(004317) does not exist in the agency(USCG)

5.3.6 To remove a COR for the Dept ID, click the Remove button by the person's name.

5.3.6.1 A confirmation dialog box will appear asking you to confirm the removal of the COR. Click the **OK** button to remove them.

5.3.6.2 The COR list will update to show that the COR was removed.

NOTE: If you try to remove the last COR on the list, you will see the following warning: "You will need to add someone else first, or you will need to contact your Tier 1 command to add someone later."

IMPORTANT: If you remove yourself, you may not be able to log back in.

5.3.7 To add a COR(s) for a department, enter search criteria (e.g., Last Name, SSN, etc.) and then click the **Find** button. This will display all people in CGPAAS based on the criteria you selected, regardless of the department ID you entered at the top.

- You may enter any Dept ID in the Dept ID field; a COR does not have to be assigned to the same Dept ID to which you are adding them as a COR.
- Entering a full SSN will override all other filter fields.

Manage CO Representatives [Help](#)

Choose a Dept ID to Manage To add a COR: First, choose a Dept ID to manage. Second, enter their name and/or Assigned Dept ID. Third, click [Find].

Dept ID:

Last Name (starts with)	First Name (starts with)	Assigned Dept ID	SSN (Full or Last 4 + Name)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Results Per Page:

Action	Pay Grade	Name	Assigned Dept ID	# Dept IDs COR for	Phone	Email	Made COR on	By Whom
<input type="button" value="Remove"/>		WICK, JOHN	CCCCCC	1	555-555-5555	john.wick@example.org	2021-01-22 16:36	Williams, Tonia L

5.3.8 Click the **Add** button next to the person you want to add as a COR for the Dept ID entered at the top. The **Add** button will be replaced with a **Remove** button.

NOTE: You can only select a Sponsor with an EDIPI (registered CAC).

5.4 Viewing Dept IDs a COR Represents

Under the **Command** tab the **COR Lookup by Name** menu item on the left allows you to view the Dept IDs that a specified COR represents.

5.4.1 Under the **Command** tab, click the **COR Lookup by Name** menu item. The “CO Representative Admin by Name” page appears.

CO Representative Admin by Name [Help](#)

Last Name (starts with)	First Name (starts with)	Assigned Dept ID	SSN (Full or Last 4 + Name)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Results Per Page: To manage a COR, enter their name and/or Assigned Dept ID and then click Find.

Action	Rank	Name	Assigned Dept ID	# Dept IDs COR for	Phone	Email
<p>CORs have the following capabilities in CGPAAS:</p> <ul style="list-style-type: none"> ▶ View and update privacy information for everyone in their Dept ID or subordinate Dept IDs (name, contact information, dependents, etc.) ▶ Search for CGPAAS Personnel by SSN ▶ Complete a Needs Assessment for Personnel in their Dept ID or subordinate Dept IDs ▶ Account for Personnel in their Dept ID and subordinate Dept IDs <p>When adding CORs to any Department, you are designating those persons with the authority to act on behalf of the Commanding Officer to perform the above functions! Please update this list as often as needed as there is no automatic maintenance of this list when Personnel leave the Command. It is up to the individual Commands to control this list.</p>						

5.4.2 Enter your search criteria (e.g. Last Name, SSN, etc.) and then click the **Find** button.

NOTE: Entering a full SSN will override all other filter fields.

CO Representative Admin by Name Help

Last Name (starts with) First Name (starts with) Assigned Dept ID SSN (Full or Last 4 + Name)

Results Per Page: 50 To manage a COR, enter their name and/or Assigned Dept ID and then click Find.

Total Results: 1 Page 1 of 1

Action	Rank	Name	Assigned Dept ID	# Dept IDs COR for	Phone	Email
<input type="button" value="Manage"/>		WICK, JOHN	CCCCC	1	555-555-5555	john.wick@example.org

5.4.3 Clicking the **Manage** button and the *number* under the column “#Dept IDs COR for” performs the same action. Clicking either allows you to do 3 things: 1) view all Dept IDs a COR is responsible for, and when and by whom they were made a COR for each department, 2) remove a department from a COR’s responsibility, or 3) add another department for the COR to be responsible for.

This works the same as if you had clicked the *number* under the column “# Dept IDs COR for” when using the **COR Lookup by Dept ID** menu item, discussed in the previous section, 3.4, step b-5.

5.5 Lookup all CORs for a Dept ID

Under the **Command** tab, the **COR Lookup by Dept ID** menu item on the left, allows you to view all CORs who represent a particular Dept ID, to remove a COR for that Dept, and to add that COR as COR for another department.

5.5.1 Under the **Command** tab, click the **COR Lookup by Dept ID** menu item. This displays the “View CO Representatives” page:

View CO Representatives

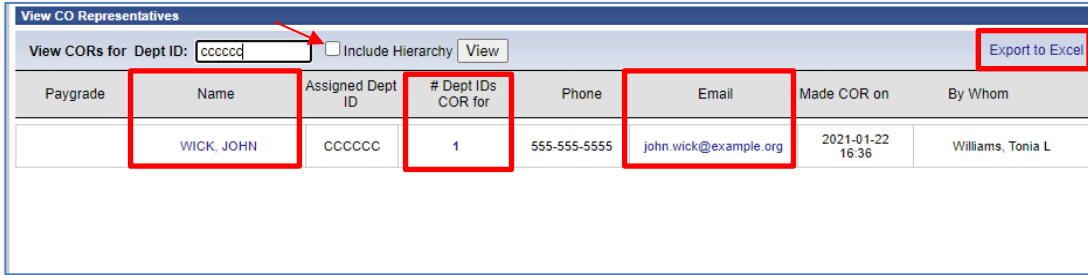
View CORs for Dept ID: Include Hierarchy

Paygrade	Name	Assigned Dept ID	# Dept IDs COR for	Phone	Email	Made COR on	By Whom
Enter a Dept ID and then click View.							

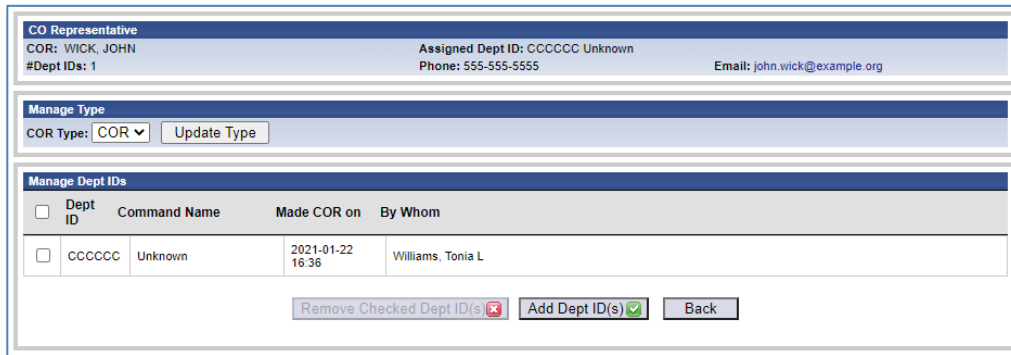
5.5.2 Enter a **Dept ID** to manage in the **Dept ID:** box, and then click the **View** button. This will display all CORs who represent the Dept ID you entered.

A COR may be assigned to one department and represent another department as its COR. The department to which a COR is assigned is displayed under the “Assigned Dept ID” column.

Some CORs represent more than one department. The number of Depts that a person represents is displayed under the “#Dept IDs COR for” column:



- 5.5.2.1 To view and manage the CORs for a department and all subordinate departments, check the **Include Hierarchy** box next to the field where you enter the Dept ID.
- 5.5.2.2 To export the list of CORs to an Excel file, click the **Export to Excel** link.
- 5.5.2.3 To send email to a particular COR, click the email address for that COR.
- 5.5.2.4 To view a full profile of a COR, click the COR’s name.
- 5.5.2.5 Click the number under the “#Dept IDs COR for” column to display the name of the COR, the department he is assigned to, the list of departments that the person is COR for, and when and by whom the COR was assigned to each department:

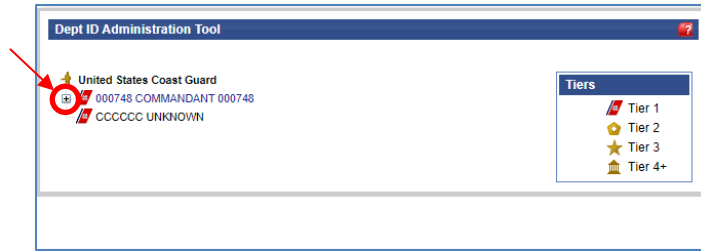


- 5.5.2.5.1 To make the COR represent another department (one that you are responsible for), click the **Add Dept ID(s)** button. This will display the “Add COR Dept IDs” window with a list of Dept IDs that you are responsible for.
 - 5.5.2.5.1.1.1 Check the box of the Dept IDs you want the COR to represent and then click **Add** (which will be highlighted after you select a Dept ID).
 - 5.5.2.5.2 To remove a particular department from the list of departments that the COR represents, click the checkbox to the left of the Dept ID, and then click the **Remove Checked Dept ID(s)** button (which will be highlighted after you select a Dept ID).

5.6 Dept Tree View

Under the **Command** tab, the **Dept Tree View** menu item on the left allows you to display the departments of the USCG in a tree view.

5.6.1 Under the **Command** tab click the **Dept Tree View** menu item on the left. The “Dept ID Administration Tool” will appear:



5.6.2 Click any “+” sign by any tier to see the lower tiers. An example is shown next:



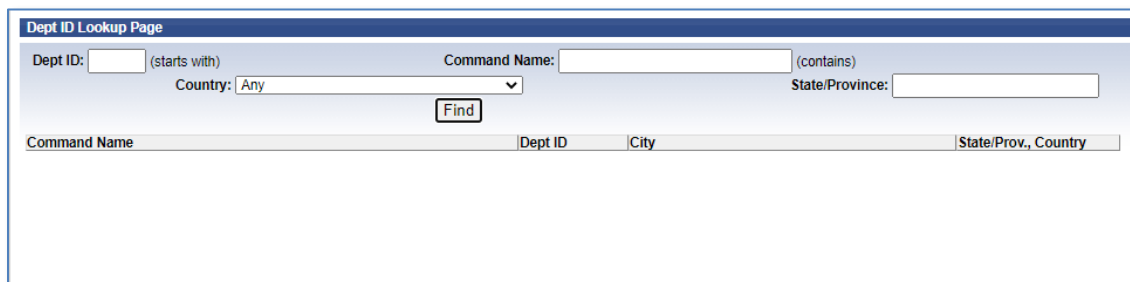
5.6.3 Click any “-” sign by any tier to hide the lower tiers beneath it.

5.7 Using the Dept Lookup Page

Under the **Command** tab, the **Dept Lookup Page** menu item on the left, allows you to search for Dept IDs based on Dept ID, Command Name, Country, and/or State.

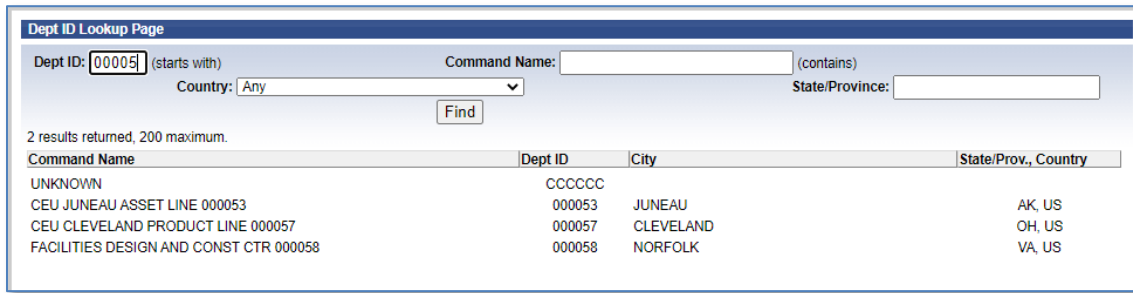
A CGHQ user type can also perform these tasks Under the **Dept ID Admin** tab, by clicking the **Dept Lookup Page** menu item on the left.

a. Under the **Command** tab click the **Dept Lookup Page** menu item on the left. The “Dept ID Lookup Page” will appear:



b. Enter any one or more search criteria into the appropriate fields and/or select a country.

- c. Click the **Find** button. CGPAAS will return a list of matching Dept IDs:

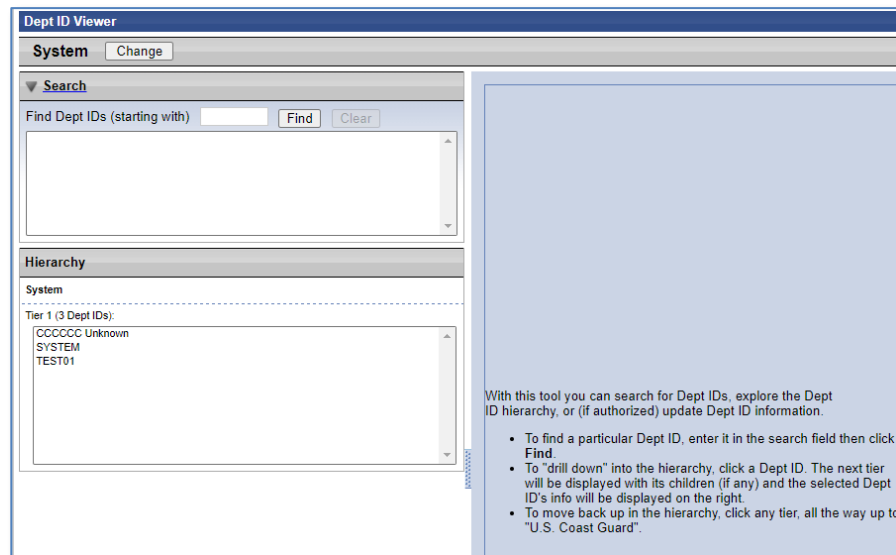


You may want to find a Dept ID when looking up CORs for a specific department, described in section 3.4; when looking at the hierarchy and information for a particular department, described in section 3.6; or when adding a new Sponsor, described in section 8.2.

5.8 View the Dept ID Hierarchy and Dept ID Information

Under the **Command** tab, the **Dept ID Administration** menu item on the left, allows you to search for Dept IDs, view the Dept ID hierarchy, and (if authorized), update the Dept ID information. Updating the Dept ID information is covered in the next section.

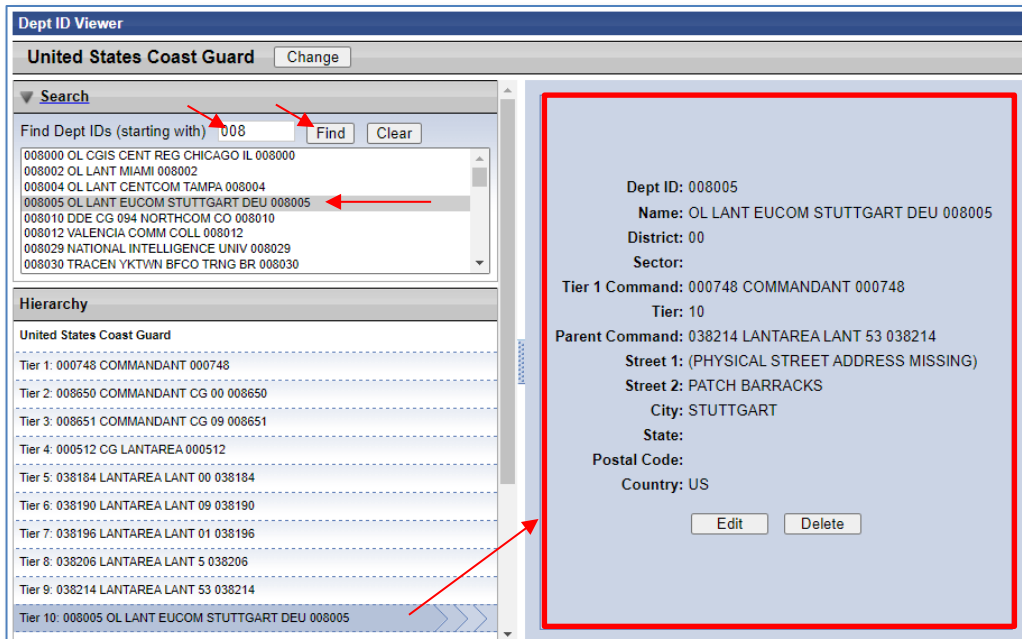
- a. Under the **Command** tab, click the **Dept ID Administration** menu item on the left. The “Dept ID Viewer” page will appear with a list of all the Tier 1 Dept IDs in the “Hierarchy” pane.



- b. If you know at least the first 3 characters of the Dept ID you are interested in, type them into the “Find Dept IDs” field and click the **Find** button. The system will return a list of Dept IDs that start with those characters, in the top “Search” pane.

NOTE: You are not required to perform a Dept ID search; you can go directly to the “Hierarchy” pane to browse the hierarchy by clicking any of the Dept IDs there.

- c. If you click any Dept ID in the returned list, the “Hierarchy” pane will update to display where the Dept ID is located in the hierarchy and any children that the Dept ID has. The information pane to the right will update to display additional detailed information about the selected Dept ID.



- d. In the above example, you entered “0088” as Dept ID search criteria and clicked the **Find** button. A list of matching Dept IDs was returned.
- e. In the results list, you clicked Dept ID “008846” and as a result it is highlighted in blue, and the “Hierarchy” and “information” panes are updated to show related information about that Dept ID.
- f. Clicking a different Dept ID causes the “Dept ID Hierarchy” and “Information” panes to update again to show information about the newly selected Dept ID.
- g. The “Hierarchy” pane can be used to browse through the Dept ID Hierarchy by clicking any of the displayed Dept ID bars or the children listed for a Dept ID. Clicking the top “U.S. Coast Guard” bar will return to a list of Tier 1 Dept IDs.

NOTE: In general, Coast Guard Tiers are as follows:

- Tier 1 Area (Pacific, Atlantic, OPCOM, and FORCECOM)
- Tier 2 District
- Tier 3 Sector
- Tier 4 Station

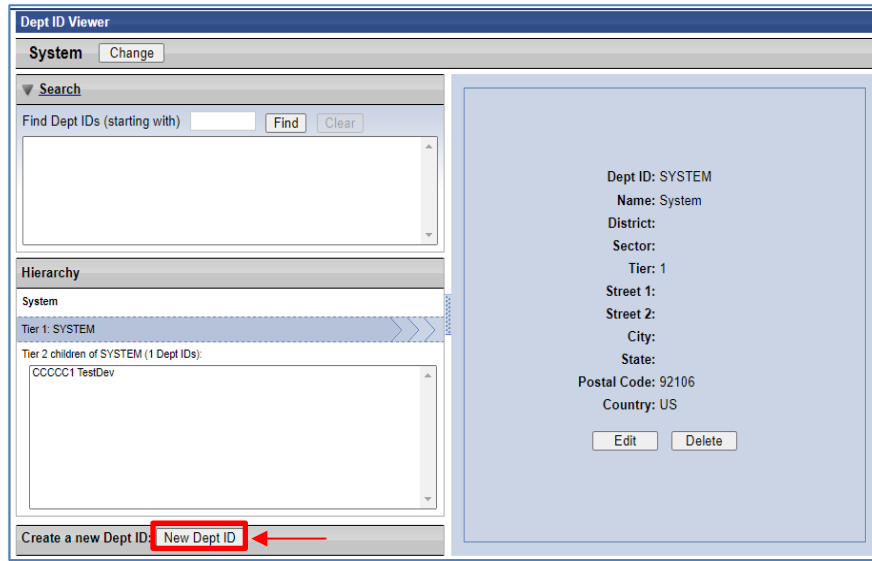
5.9 Updating the Dept ID Administration (CGHQ Only)

If you are a CGHQ user type, you can view the Dept ID hierarchy and information like a COR, but you also have the ability to add, delete, edit, and move Dept IDs. In this case, you will have additional buttons when using the **Dept ID Administration** menu item under the **Command** tab, which others who are not CGHQ users will not see.

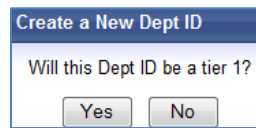
5.9.1 Add a New Department ID

To add a new Dept ID, you must have the CGHQ user type. If you do have the CGHQ user type, you will start under the **Command** tab. You can also access this page from under the **Dept ID Admin** tab, where you would click the **Dept Administration** menu item on the left.

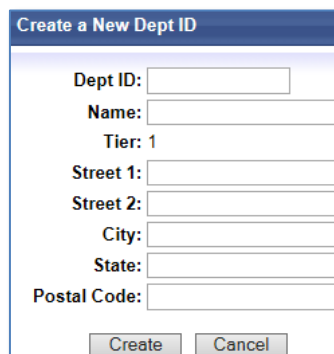
- a. Click the **Dept Hierarchy Admin** menu item on the left to display the "Dept IDViewer" window if it is not already displayed.



- b. Click the **New Dept ID** button at the bottom of the window. This will prompt you with a question:



1. If you click the **Yes** button, this will display the **Create a New Dept ID** window:



- i. Enter the new department information and then click the **Create** button; otherwise, click the **Cancel** button.
2. If you click the **No** button, this will display a slightly different **Create a New Dept ID** window:

- i. To stop, without creating a new department, click the **Cancel** button.
- ii. To enter the new department, enter a **Dept ID** of at least 6 characters and a department **Name** of at least 5 characters and then click the **Change** button, to designate the parent command. This will display the **Find New Parent Dept ID** window:

- a) Type in the first 3 characters of the Dept ID if you know it, or type in the first 5 characters of the Department Name, and optionally, take the following steps to further refine your search for the Parent Department ID:
 - i) Click the **Tier** drop-down list to select the tier for the Dept ID you are searching for (NOT for the current department).
 - ii) Click the **Under** drop-down list to choose either Dept ID “CCCCCC” which is a container for inactive or invalid Dept IDs, or one of the Tier 1 Departments which you represent as a District COR.
- b) Click the **Find** button. A list of resulting Dept IDs is displayed.

- c) Click the desired Parent Command Dept ID if you see it in the list or click the **New Search** or **Revise Search** links to search again. The “Create a New Dept ID” window will be displayed again, with the **Tier 1 Command** field and the **Parent Command** field now populated.

- d) Enter the address fields if desired.
- e) Click the **Create** button. This will display a message saying, “Validating Data” and then a screen showing the organization was added:

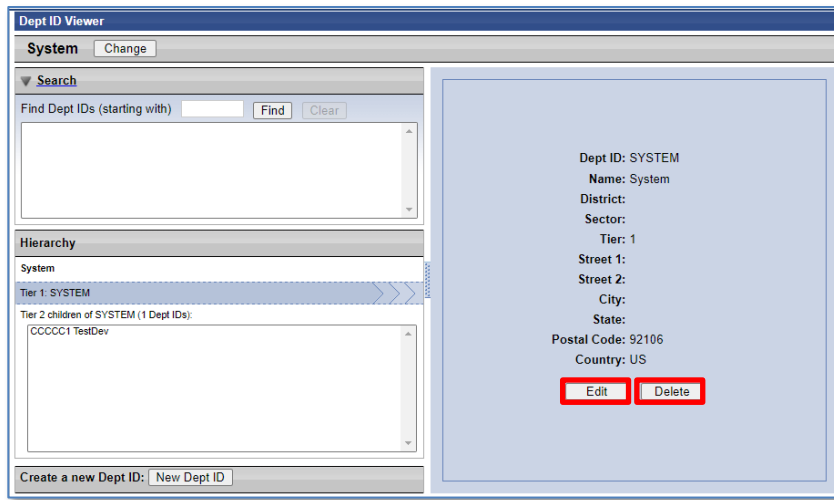
5.9.2 Search for, Edit, and Delete a Department ID

If you are a CGHQ user type, you have the ability to edit or delete a department ID. To do so, start by searching for it using the **Dept ID Administration** menu item under the **Command** tab. Clicking this menu item will display the “Dept ID Viewer” page.

NOTE: This menu item works the same as the **Dept Administration** menu item under the **Dept ID Admin** tab only available to CGHQ user types.

- c. Click the **Dept Hierarchy Admin** menu item under the **Command** tab.
- d. Enter the first 3 or more digits of the Dept ID that you want to find, to the left of **Find**.
- e. Click the **Find** button.

- f. Click a Dept ID in the “Search” pane with results or click a Dept ID in the “Hierarchy” pane. There is now an **Edit** button and a **Delete** button on the right.



- g. Click the **Delete** button in the right pane to delete the department. A message asking you to confirm will appear. **NOTE:** You cannot delete a department with people in it or with a child-department. If you attempt to, you will receive the following message:
- h. Click the **Edit** button in the right pane. Editing options will be displayed:



1. Make any changes to the address, if necessary.
2. Click the **Move Dept ID** button. A window will pop up asking you the following question:



- i. If you want to change the parent command, click the **Change Parent Command**

button. This will open the "Find New Parent Dept ID" window.

- a) Enter the first 3 characters of the Dept ID if you know it, or type in the first 5 characters of the Department Name, and then optionally use the following options to further refine your search:
 - i) Click the **Tier** drop-down list to select the tier for the Dept ID you are searching for (NOT the current department).
 - ii) Click the **Under** drop-down list to choose either Dept ID "CCCCCC" which is a container for inactive or invalid Dept IDs, or one of the Tier 1 Departments which you represent as a District COR.
- b) Click the **Find** button. A list of resulting Dept IDs is displayed.

- c) Click the desired Parent Command Dept ID if you see it in the list, or click the **New Search** or **Revise Search** links to search again.
 - ii. If you want to make the department a Tier 1, click the **Make a Tier 1** button.

The screenshot shows a web form for editing department information. The form fields include: Dept ID (009020), Name (CG CRYPTOLOGIC UNIT WASH DC 009020), District (05), Sector, Tier 1 Command (000748), Tier (7), Parent Command (009016), Street 1 (9800 SAVAGE RD), Street 2 (STE 6301), City (FORT MEADE), State (MD), Postal Code (20755), and Country (US). A 'Move Dept ID' button is highlighted with a red box. A dialog box titled 'Would you like to...' is overlaid on the form, containing three buttons: 'Change Parent Command', 'Make a Tier 1', and 'Cancel'. The 'Save' button at the bottom of the form is also highlighted with a red box.

3. Click **Save** if you want to save all changes you have made.
4. Click **Reset** if you want to undo all changes you made and start over with your edits.
5. Click **Cancel** to go back to the screen you saw in step **d** when you first searched for a Dept ID.

5.10 Dept ID Workbook Generator

The **Dept ID Workbook Generator** menu item under the **Dept ID Admin** tab allows the CGHQ user type to download an Excel workbook with a separate spreadsheet for each Tier 1 Command, listing all subordinate commands for that Tier 1 Command, as of the date and time you create the workbook. This works the same as the **Dept ID Workbook Gen** menu item under the **Admin** tab, described in section 16.4.

- h. Under the **Dept ID Admin** tab click the **Dept ID Workbook Generator** menu item on the left.

The screenshot shows the 'Dept ID Admin' tab selected in a navigation menu. The menu items are: Dept Administration, Dept Lookup Page, Dept ID Tree View, Dept ID Excel Download (highlighted with a dotted border), and CO Reference. On the right side of the page, there is a form with a dropdown menu for 'Agency' set to 'USCG' and a 'Build Workbook' button.

- i. Click the **Build Workbook** button.
- j. Click the **Open**, **Save**, or **Cancel** button as appropriate.

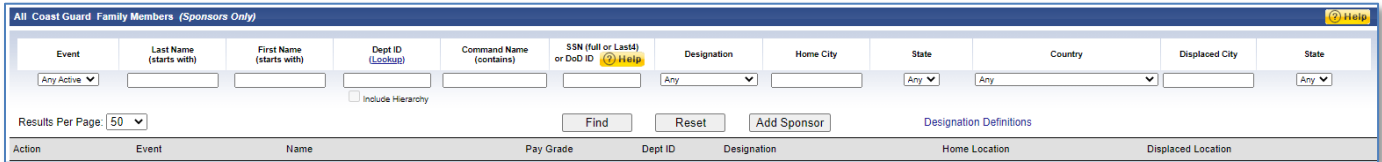
6 Personnel Tab

The **Personnel** tab is where you will perform a variety of tasks such as viewing and managing personnel. Other capabilities you have under the **Personnel** tab are that ability to search for personnel based on various criteria, export lists of personnel to an Excel file, add new personnel, view details about individuals, add and edit contact information and family member information, change an individual's password or username, and update a Sponsor's department ID.

6.1 Search for Personnel

The first screen you see when you click the **Personnel** tab is the “All Coast Guard Family Members (*Sponsors Only*)” page. “Coast Guard Family Members” are Active Duty, all Reservists, Civilian Employees, and their dependents. Some OCONUS contractors are also considered part of the “Coast Guard Family”.

- a. Click the **Personnel** tab.



- b. Enter any combination of desired search criteria by entering fields or by using the drop-down lists.
- c. Click the **Find** button. A list of the personnel who meet your search criteria is displayed:

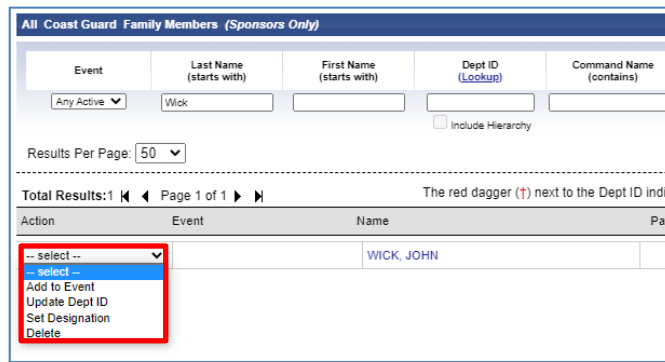


- d. If desired, click the **Results Per Page** drop-down list to change the number of results that are displayed per page. The default is 50, but you can choose to select 100 or 250 results per page instead.
- e. Click the name of a Sponsor to open the Sponsor’s “Full Profile” page which displays the Sponsor’s contact, work, and family information:



- f. To select an action for a particular employee, click the drop-down menu under the

Personnel tab, in the left hand “Action” column on the same row as the employee:



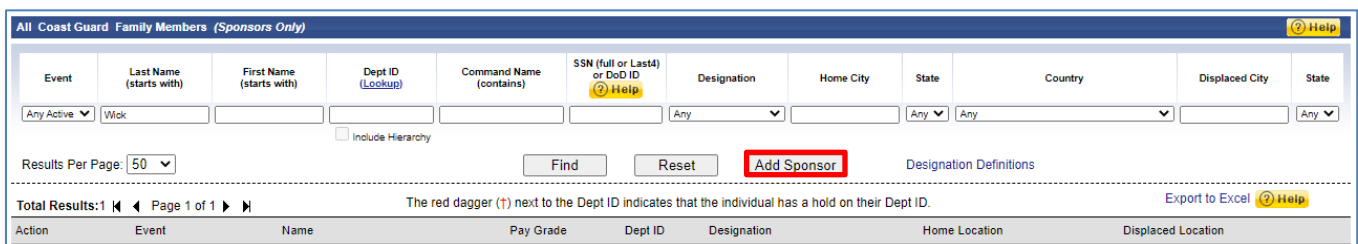
1. Click **Add to Event** to indicate that a Sponsor was affected by the event and should be accounted for. See section 8.4 for more information.
2. Click **Update Dept ID** to change the Sponsor’s Dept ID. You can only move the Sponsor to a department for which you are a COR.
3. Click **Set Retired/Seperated** to change the Sponsor’s designation to Retired/Seperated.

NOTE: The designation change will take effect immediately if the Sponsor is not required to account for an event. Otherwise, the request will be handled shortly after the event is closed.

6.2 Add Personnel and Information

You can add a Sponsor to CGPAAS if they are not already in the system. **NOTE:** The Sponsor’s SSN is required. To add family members of a Sponsor, use the “Full Profile” page described in section 8.3.

6.2.1 Click the **Personnel** tab. The “All Coast Guard Family Members (*Sponsors Only*)” page appears.



6.2.2 Click the **Add Sponsor** button. The “Add Sponsor” window appears.

6.2.3 Enter information in the available fields. Fields in the upper pane are required.

6.2.4 For help using the **Dept ID Lookup** button to enter a **Dept ID**, see section 3.8 and then you will *also* click the **Select** button at the bottom of the page in the “Dept ID Lookup Page”. **NOTE:** You do not see the **Select** button in section 3.8, but it is displayed when you use the **Dept ID Lookup** button in conjunction with adding a Sponsor.

6.2.5 Click **Save** or click **Save and Add Another** if you need to add more than one Sponsor.

6.3 Edit CGFM Personal Information

To edit the information for a family member of a Sponsor, you must start by displaying the Sponsor's “Full Profile” page.

6.3.1 On the **Personnel** tab, search for the Sponsor, and then click the Sponsor's name. This will display the summary page of the CGFM's “Full Profile”. See section 8.1 for more information.

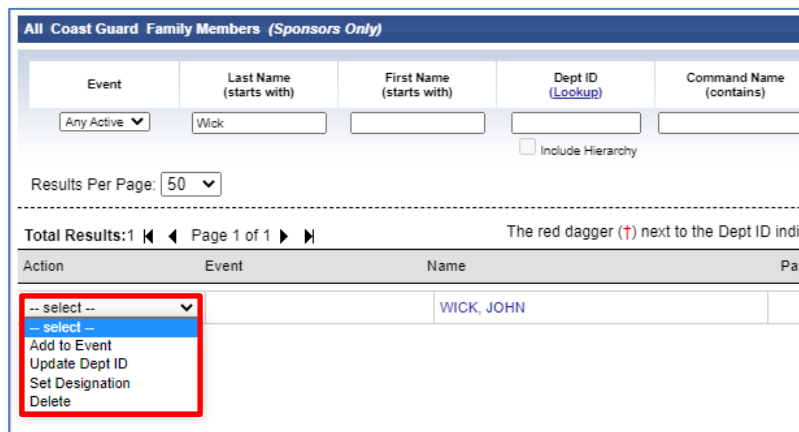


6.3.2 Clicking the menu items to the left of the window will display the corresponding “Full Profile” pages and allow you to edit this information.

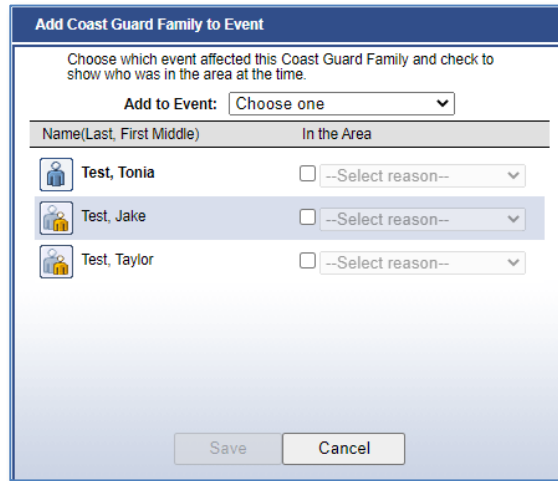
The “Full Profile” window for Sponsors behaves identically to your own “Full Profile” window that is accessed through the **My Info** tab. See section 2 for information on how to edit the content displayed in a Full Profile.

6.4 Affect Personnel for an Event

If someone in your command was affected by an event, but is not listed as such in CGPAAS, you can add them to the list of “Affected” personnel for that event, and thereby automatically enable that person to account for themselves. To view personnel who are affected, see section 9.1.



- 6.4.1 Click the **Action** drop-down menu to the left of a Sponsor, and then select **Add to Event**. The “Add Coast Guard Family to Event” window will appear:



- 6.4.1.1 Click the **Add to Event** drop-down list and select an event.

- 6.4.1.2 Click the box below “In the Area” for the Sponsor and any dependents which would be listed if the Sponsor has dependents.

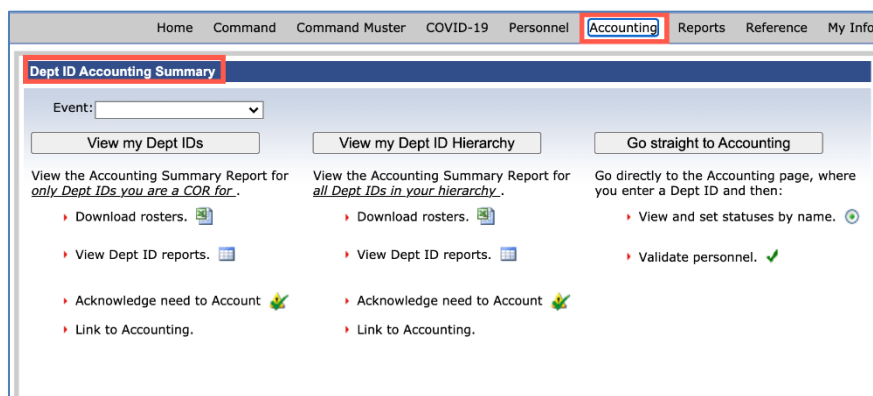
- 6.4.1.3 Click the **Select reason** drop-down list and select a reason, and then click **Save**.

- 6.4.2 To verify that the new event is listed in the “Sponsor’s Event” column, click the **Find** button again.

7 Accounting Tab

The accounting tab is where all CORs can view, monitor, and update the accountability status for personnel affected by a particular event. Here you can view reports for Dept IDs you are a COR for, or for all Dept IDs in your hierarchy, and you can view an individual’s status.

- a. Click the **Accounting** tab. The “Dept ID Accounting Summary” page appears.



- b. Click the **Event** drop-down list to select an event.

NOTE: This list contains events for which accounting is required and may be open or stopped (will show “Inactive”), whereas the list under the **Personnel** tab contains *all*

open events, including some events that may not require accounting.

- c. Click **Go straight to Accounting** to view the “Accounting for Coast Guard Family Members” page, covered in paragraph 9.1.
- d. Click **View my Dept IDs** to display the “Dept ID Accounting Summary”, with all department IDs for which you are directly responsible

OR

Click **View my Dept ID Hierarchy** to display the “Dept ID Accounting Summary”, with all department IDs for which you are directly responsible and their hierarchy:



Download Roster	View Report	Ack Accounting	Dept ID	Command Name	# Personnel (Incl. Fam. Members)	# Affected (Rqd. to Account)	% Accounted	# Accounted	# Unaccounted
			All My Dept IDs	Totals for My Dept IDs	215	198	0%	0	198
			007780	MSU MORGAN CITY 007780	138	127	0%	0	127
			047059	MSD LAFAYETTE 047059	36	35	0%	0	35
			047060	OL VTS BERWICK BAY MORGAN CITY 047060	41	36	0%	0	36

- e. Click a **Dept ID** number on the left to account for personnel, or to view the accounting status of personnel, who are affected by a particular event in that department. The window you will see and actions you can take are covered in the following section, 9.1, step b.
- f. Click **All My Dept IDs** to account for personnel, or to view the accounting status of personnel, who are affected by a particular event in your Dept ID hierarchy. The window you will see and actions you can take are covered in the following section, 9.1, step b.
- g. Click the download roster icon to view an excel spreadsheet of affected personnel, for the corresponding Dept ID, on the same line as the icon:

Name	Is a sponsor	Accounting Status	Designation	Title	Payg
EXAMPLE, CHRISTOPHER L.	TRUE	Not Affected	RESERVE PERSONNEL (AT/ADT/ADSW/MOB)		MEE6
EXAMPLE, ANGELA M.	FALSE	Not Affected	Family Member		MEE6
EXAMPLE, ANDREW J.	FALSE	Not Affected	Family Member		MEE6
EXAMPLE, EVA M.	FALSE	Unreported	Family Member		MEE6

- h. Click the view report icon for a particular department ID. The “Dept ID Accounting Detail” page will appear in a new window:

Dept ID Accounting Detail									
Dept ID: 004311 - ACADEMY - CADETS (004311)				Event: California Earthquake & Tsunami			As of 14 Mar 2018 at 1444 PDT		
Designation	Accounted For, Current Residence	Accounted For, Displaced Location	Accounted For, Deceased	Not Accounted For	DUSTWUN / EAWUN	Not Present in GAOI	Reported / Not Validated	Unreported	Total
Active Duty/FTS	0	0	0	0	0	80	0	80	80
Contractor	0	0	0	0	0	0	0	0	0
CONUS Contractors	0	0	0	0	0	0	0	0	0
Employee	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0
RESERVE PERSONNEL (AT/ADT/ADSW/MOB)	0	0	0	0	0	0	0	0	0
Retired/Separated	0	0	0	0	0	0	0	0	0
SELRES/DRILLING RESERVES	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	80	0	80	80

- i. Click the acknowledge accounting icon  for any of the displayed Dept IDs to indicate that you are aware of the need to account. Once you have done this, the corresponding icon will change to .
- j. Close the window when finished or return to the previous page (“Dept ID Accounting Summary”) to open another Dept ID report.

7.1 Account for Personnel Affected by an Event

The “Accounting for Coast Guard Family Members” page available via the **Accounting** tab is where you have the ability to account for or view personnel and/or dependents who are affected by a particular event and who are required to account. There are two different ways to get to this page, both from the “Dept ID Accounting Summary” page.

- a. One way to get to the Accounting page is via the “Dept ID Accounting Summary” page (displayed when you first click the **Accounting** tab). On this page you select an event, and then click **the Go straight to Accounting** button at the top of the page. The initial page will not show any personnel:

Accounting for Coast Guard Family Members

Event	Last Name (starts with)	First Name (starts with)	Full SSN	Designation Type	Dept ID	Accounting Status	Population	Country
Calif Tsunami				Any	Any	Any	All	Any

Include Hierarchy
 [Accounting Status Definition](#)

Family Records Per Page:

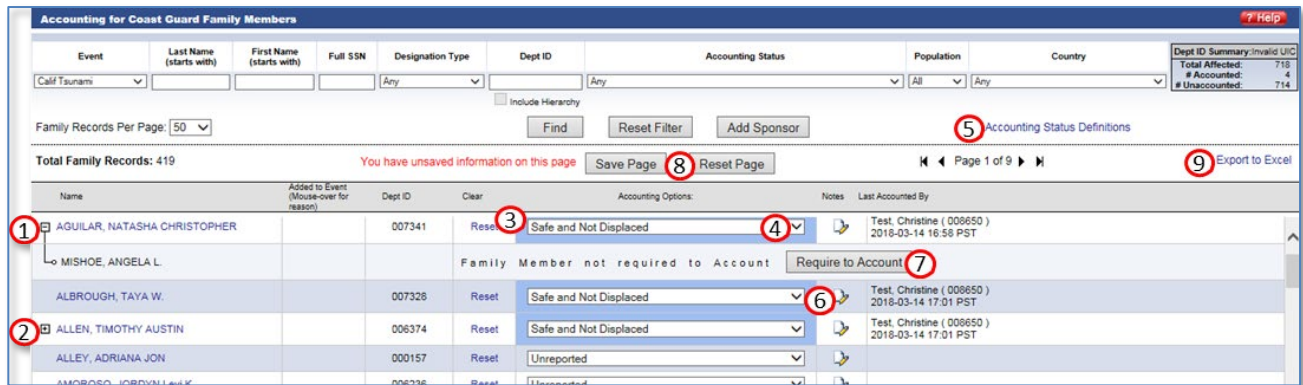
Name	Added to Event (Mouse-over for reason)	Dept ID	Clear	Accounting Options:	Notes	Last Accounted By

1. Enter any search criteria, such as Last Name, First Name, Full SSN, Designation Type, Dept ID, Accounting Status, Population or Country.
2. Check the **Include Hierarchy** checkbox if you want to include any subordinate departments with affected personnel in your search records.
3. Click the **Reset Filter** button to clear all search criteria and enter new criteria.
4. Click the **Add Sponsor** button to add a new Sponsor and, optionally, an event that this Sponsor is affected by. Fill in all fields, as covered in section 8.2.
5. Click the **Find** button to show accounting data for all affected Sponsors and affected

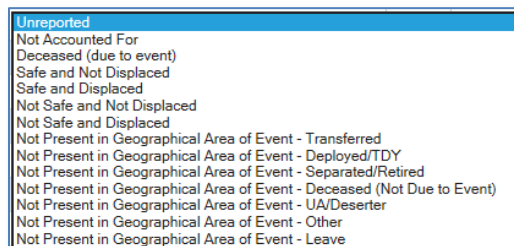
family members, in the specified event who meet your search criteria and are required to account. As seen in the next figure in step b, this will display the accounting status, a link to any notes, who accounted for each person, and when.



NOTE: Even if a Sponsor is not affected, if any member of the Sponsor's family is affected, the Sponsor and the whole family are displayed.

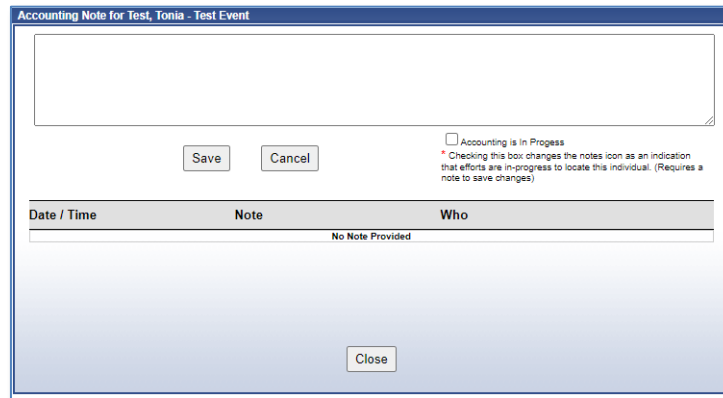
- b. Another way to view the "Accounting" page, is also via the "Dept ID Accounting Summary" page (displayed when you first click the **Accounting** tab). Here you would select an event and then click either the **View only my COR Dept IDs** button or the **View all My Dept IDs** button and then click a specific Dept ID's link. If there are affected personnel in the selected department(s), they are displayed:





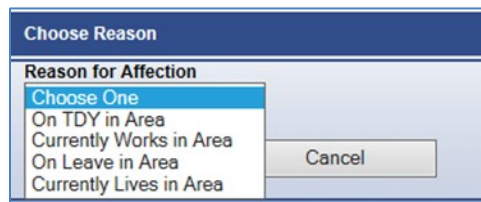
1. To hide family members of a Sponsor, click the “-” sign next to the Sponsor’s name.
2. To show family members of a Sponsor, click the “+” sign next to the Sponsor’s name.
3. To reset the accounting status for a participant, back to what it was since the last time it was saved, click the **Reset** link in the row with their name.
4. Click the drop-down list under **Accounting Options** to set an accounting status for any participant:



5. Click the **Accounting Status Definitions** link for a list of statuses and their definitions.
6. To add a note or to view existing notes, click the **Notes** icon. (This will be  if there are no notes or  if there are notes.) The “Accounting Note for ... ” window will appear:



- i. Type a note into the window and then click the **Save** button. (The note window will close and the  icon will change to an  icon to indicate that there is a note.)
 - ii. To view existing notes, simply click **Close** when finished.
7. To require that a Sponsor or family member account for themselves, click the **Require to Account** button. This will display a message asking if you are sure.
- i. Click **OK** and a “Choose Reason” window will appear:



- ii. Select a reason and then click **OK** (under the drop-down list).
This has the same effect as using the **Action** drop-down list by a person's name to add them to an event under the **Personnel** tab, as covered in section 8.4.
8. Click the **Save Page** button to save changes you made to accounting statuses or click the **Reset Page** button to undo all changes made to the accounting statuses for participants since the last time they were saved.
- Next to the **Save Page** button, the system will display “You have unsaved information on this page”. This is to let you know that If you try to search again, or navigate away from the page, your changes will not be saved.
9. Click the **Export to Excel** link to save the accounting statuses to an Excel spreadsheet which you can save and use to easily sort or filter results.

8 Reports Tab

From the **Reports** tab you have the ability to view, or save to an Excel spreadsheet, any of a number of different types of reports.

- a. Click the **Reports** tab to display the “Reports” page. From here you can choose from several reports to view or display:

Address Reports		
Address Info Update Status All Coast Guard Report by Region Address Info Update Status Dept ID Report by Chain of Command Address Info Update Status Dept ID Report by Hierarchy	Address Info Update Status Roster Report by Chain of Command Address Info Update Status Roster Report by Dept ID Address Info Update Status Roster Report by Hierarchy	Address Information Update - Summary Report
Assessment & Case Management Reports		
Assessments Daily Tally of New Assessments Summary of Personnel Assessments by Dept ID Case Status Actions Taken Summary (1-4) Actions Taken Summary (3-4)	General Statistics General Statistics by Dept ID and Event (CSV only) General Statistics by Event	Severity Levels Category Issues Count Daily Status Report Severity Levels Trends Unresolved Issues - Current Month to Date Unresolved Issues - Previous Month to Current Month
COVID-19		
All Coast Guard Report All Coast Guard Report by Chain of Command	Dept ID Report Dept ID Report by Chain of Command	Tier 1 Category Summary Report Tier 1 Summary Report
Individual Augmentee		
CIAC Reports CIAC Daily Report CIAC Quarterly Report - by Chain of Command CIAC Quarterly Report - by UIC Crisis Contact List IA Command Summary Report - by Chain of Command IA Command Summary Report - by UIC Item Completion Summary Report Sailing List by Chain of Command Sailing List by UIC	FFSC/IDSS Reports Black Belt Report ECRC Report (CSV only) Family Status Report by Chain of Command Family Status Report by UIC IA Cases Report by Region IA Contact Interval Report by Region/FFSC IA Contact Interval Report by UIC IA Contact Report by Region/FFSC IA Contact Report by UIC IA Departure/Return Report by Region/FFSC IA Departure/Return Report by UIC IA QA Report by Region IA Statistics Report by Region/FFSC IA Statistics Report by UIC	IA Family Charts IA Families with Children Under 18 by Region/FFSC IA Family Contact by Region/FFSC
Misc Reports		
Dept ID Hierarchy (Excel)		
Personnel Accountability		
All Coast Guard Report All Coast Guard Report All Coast Guard Report by Dept ID Performance Report - First 100 Hours (a.k.a. "Snake Chart") Updated Performance Report - (a.k.a. "Snake Chart") CORs COR Metrics Report COR Metrics Report by Chain of Command DoD Event Report Co-Com Personnel Accountability Report	Evacuation Displaced Personnel Roster Displaced Roster by Dept ID Evacuation All Coast Guard Report by Region Evacuation Dept ID Report by Chain of Command Evacuation Dept ID Report by Hierarchy Evacuation Report by Chain of Command Evacuation Roster by Dept ID Evacuation Roster by Hierarchy	Other PA Reports Accounting Roster by Event and Dept ID Accounting Roster by Event and Dept ID - Detailed Deceased List Dept IDs without CORs PA All Dept ID Reports All Dept ID Report by Chain of Command All Dept ID Report by Dept ID All Dept ID Report by Hierarchy All Dept ID Rollup Summary Recall Roster Reports Recall Roster Report by Dept ID

b. To return to this page from any of the reports, click the **Reports** tab again.

8.1 All Coast Guard Report

From the **Reports** tab, the report type headings are in alphabetical order. Scroll down to the **Personnel Accountability** heading to view the following reports. The "All Coast Guard Report" shows all 12 Personnel Designation types and the personnel accountability (PA) numbers broken down for each one.

a. Click the **All Coast Guard Report** link under the **Reports** tab. The "PA USCG Report" page will be displayed:

PA USCG Report

Event:

District:

Select an event and an option from the District list and press "View Data" to execute the report.
To return to the main Reports page, click the Reports tab.

1. Click the **Event** drop-down list and select an event.
2. Click the **District** drop-down list and select a district. **NOTE:** “All” in the **District** drop-down list displays all personnel in the selected event, across all districts.
3. Click the **View Data** button to see the report:

NOTE: “Unaccounted For” is typically a very low number referring to those who have

PA USCG Report

Event:

District:

As of 19 Mar 2018 at 1421 PDT [Export to Excel](#)

Service: USCG	Total Affected	Accounted For	% Accounted For	Unreported	Unaccounted For	Accounted For - Displaced
1. Active Duty	5448	3	<1%	5445	0	1
2. Selected Reserve (SELRES)	0	0	0%	0	0	0
3. CG Civilians	631	1	<1%	630	0	0
4. NAF Civilians	0	0	0%	0	0	0
5. Drilling/Paid Reservists	0	0	0%	0	0	0
6. Contractors	1	0	0%	1	0	0
7. Dependents of Active Duty	4831	2	<1%	4828	1	2
8. Dependents of Selected Reserve (SELRES)	0	0	0%	0	0	0
9. Dependents of CG Civilians	219	0	0%	219	0	0
10. Dependents of NAF Civilians	0	0	0%	0	0	0
11. Dependents of Drilling/Paid Reservists	0	0	0%	0	0	0
12. Dependents of DOD Contractors	0	0	0%	0	0	0
Total	11130	6	<1%	11123	1	3

been reported with a status of “unaccounted”, as if they cannot be found. “Unreported” means that nothing (no whereabouts nor status) has been reported about a person at all.

- i. Click the **Export to Excel** link to save or view this as an Excel spreadsheet.
- ii. Click the **Hide Filter** link to display the report without anything above the date, and it will change **Hide Filter** to **Show Filter**:

PA USCG Report

As of 19 Mar 2018 at 1421 PDT [Export to Excel](#)

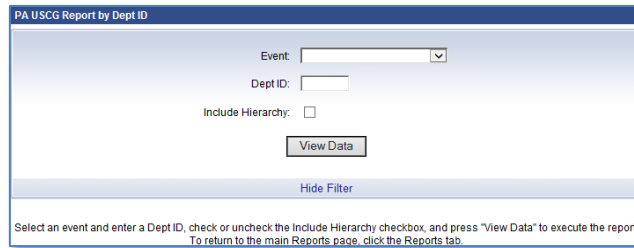
Service: USCG	Total Affected	Accounted For	% Accounted For	Unreported	Unaccounted For	Accounted For - Displaced
1. Active Duty	5448	3	<1%	5445	0	1
2. Selected Reserve (SELRES)	0	0	0%	0	0	0
3. CG Civilians	631	1	<1%	630	0	0

- iii. Click the **Show Filter** link to display the report with the filters again.
- iv. Select another Event and/or District or click the **Reports** tab to return to the main “Reports” page.

8.2 All Coast Guard Report by Dept ID

This report provides the same information that the “All Coast Guard” Report provides, except that it provides the information for a particular Dept ID that you specify, and for the Dept ID’s hierarchy, if indicated.

- 8.2.1 Under the **Reports** tab, click the **All Coast Guard Report by Dept ID**. The “PA USCG Report by Dept ID” page will be displayed:



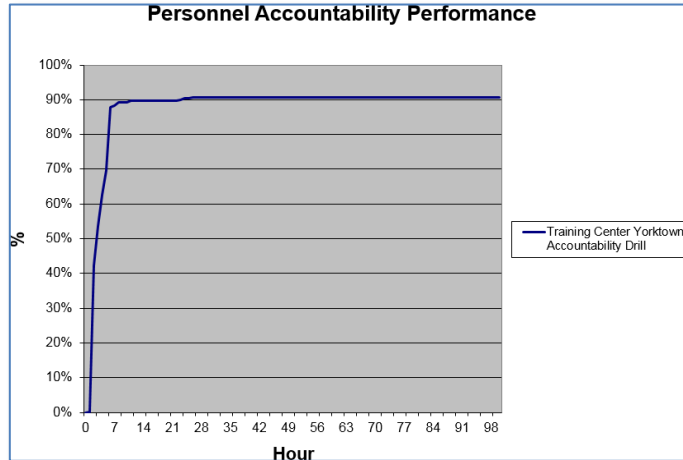
- 8.2.2 Click the **Event** drop-down list and select an event.
- 8.2.3 Enter a **Dept ID** in the **Dept ID** field.
- 8.2.4 Click the **Include Hierarchy** checkbox to include data for subordinate departments to the one you enter in the **Dept ID** field.
- 8.2.5 Click the **View Data** button to see the report. The following is an example report:

Service: USCG	Total Affected	Accounted For	% Accounted For	Unreported	Unaccounted For	Accounted For - Displaced
1. Active Duty	11	1	9.1%	10	0	0
2. Selected Reserve (SELRES)	0	0	0%	0	0	0
3. CG Civilians	0	0	0%	0	0	0
4. NAF Civilians	0	0	0%	0	0	0
5. Drilling/Paid Reservists	0	0	0%	0	0	0
6. Contractors	0	0	0%	0	0	0
7. Dependents of Active Duty	8	1	12.5%	6	1	1
8. Dependents of Selected Reserve (SELRES)	0	0	0%	0	0	0
9. Dependents of CG Civilians	0	0	0%	0	0	0
10. Dependents of NAF Civilians	0	0	0%	0	0	0
11. Dependents of Drilling/Paid Reservists	0	0	0%	0	0	0
12. Dependents of DOD Contractors	0	0	0%	0	0	0
Total	19	2	10.5%	16	1	1

- 8.2.6 Click the **Reports** tab to return to the main “Reports” page.

8.3 Performance Report – First 100 Hours (a.k.a. “Snake Chart”)

This report displays the % accounted for at the top of each hour throughout the first 100 hours of an event. This is an example report:



8.3.1 Click the **Performance Report – First 100 Hours (a.k.a. “Snake Chart”)** link under the **Reports** tab. The “Personnel Accountability Performance Report” window will appear:

The screenshot shows the "Personnel Accountability Performance Report" window. It features a title bar, an "Event:" dropdown menu, and a "Download Excel" button. Below the button, there is instructional text: "Select an option from the event list and press 'Download Excel' to execute the report. To return to the main Reports page, click the Reports tab." A note at the bottom states: "Note: This report only tracks the first 100 hours of an event."

8.3.2 Click the **Event** drop-down list and select an event.

8.3.3 Click the **Download Excel** button to download the report to an Excel spreadsheet.

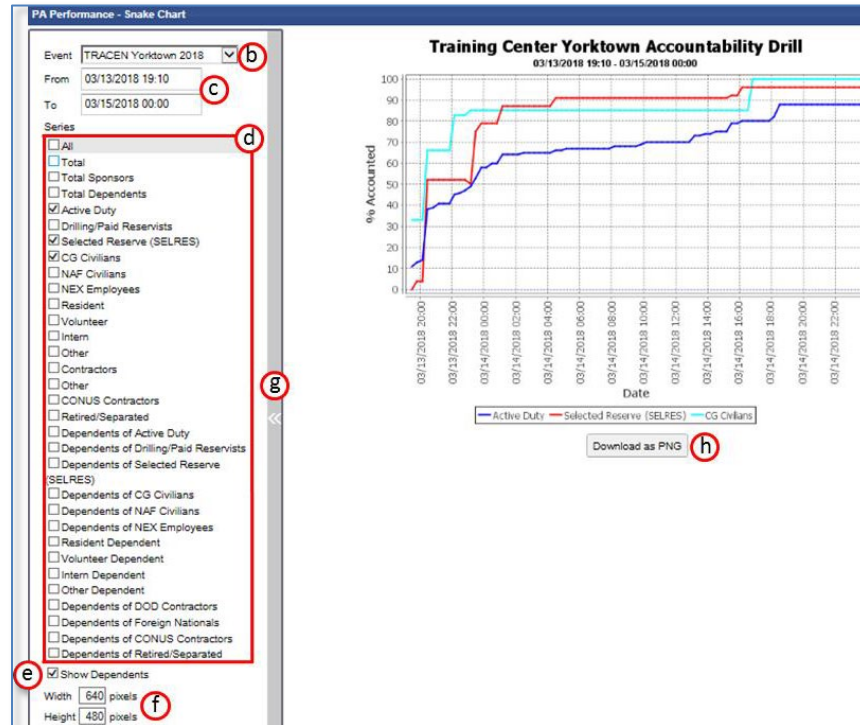
8.3.4 Once you open the spreadsheet, click the “Source data” tab at the bottom of the spreadsheet to view more details, i.e. the statistics that went into the snake chart:

As of 19 Mar 2018 at 1600 PDT					
Event:		Training Center Yorktown Accountability Drill			
Time	Hour	Count	Subtotal	%	
3/13/18 6:00	0	0	0	0%	
3/13/18 7:00	1	1	1	0%	
3/13/18 8:00	2	473	474	42%	
3/13/18 9:00	3	125	599	53%	
3/13/18 10:00	4	102	701	63%	
3/13/18 11:00	5	80	781	70%	
3/13/18 12:00	6	203	984	88%	
3/13/18 13:00	7	7	991	88%	
3/13/18 14:00	8	10	1001	89%	
3/13/18 15:00	9	0	1001	89%	
3/13/18 16:00	10	0	1001	89%	
3/13/18 17:00	11	4	1005	90%	

8.3.5 Click the **Reports** tab to return to the main “Reports” page.

8.4 Updated Performance Report - (a.k.a. “Snake Chart”)

This report is available only for CGHQ users. Like the previous Snake Chart described in section 10.3, this report displays the % accounted for at regular intervals of an event. This



report, however, gives you much more control about the content that is displayed and how it is displayed. This is an example report:

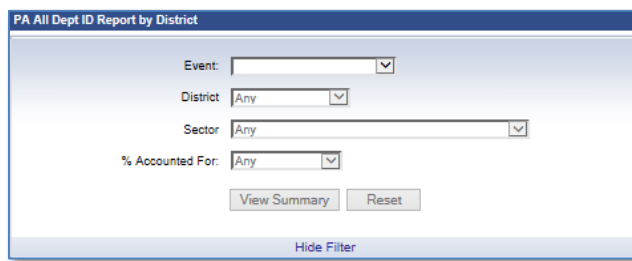
- Click the **Updated Performance Report - (a.k.a. “Snake Chart”)** link under the **Reports** tab. (This link will not work for you if you are not a CGHQ user.) The “PA Performance – Snake Chart” window will appear.
- The **Event** pull-down menu will display an event; if desired, click this to select another event.
- The default start and end dates and times for the event will be displayed. Click these fields to change the default values, if desired.
- In the “Series” box, click the groups for which you want to see accounting numbers. The default is “Total”. **NOTE:** The total includes all groups, not just those you have checked.
- The “Show Dependents” check box is checked by default so that the “Series” box includes lists of groups of dependents. Uncheck this check box if you want to shorten the “Series” list. By default, the groups of dependents are displayed.
- Enter a number of pixels for width and height of your graph. The default values are 640 X 480 (width by height). If you increase or decrease these values, you will be zooming in or out on the graph. Increase width to make the graph display more granularity over time for the same dates selected; increase height to make the graph show more granularity of % accounted for during the same dates.

- g. Click the arrows to the left of the graph to display the graph only.
- h. Click the **Download as PNG** button to save the graph to a file.
- i. Click the **Reports** tab to return to the main "Reports" page.

8.5 All Dept ID Report by Chain of Command (District)

This report provides an accountability status for each Dept ID in a selected District. It includes Total Assigned, Total Affected, Number Accounted For and % Accounted For. It may be downloaded in summary form (as displayed) or in a more detailed form which includes underlying data.

- 8.5.1 Click the **All Dept ID Report by District** link under the **Reports** tab. The "PA All Dept ID Report by District" page will appear:



- 8.5.2 Click the drop-down lists to select an event and a district, and optionally, a sector and % accounted for.

- 8.5.3 Click the **View Summary** button and a table similar to the following will appear:

As of 22 Jan 2021 at 18:10 PST

Dept ID	Unit Name	Event Name	Total Assigned	Total Affected	Acct. For	% Acct. For	Dept ID All Acct. For	Acknowledged	District	Sector	Reporting Path Tier 1	Reporting Path Tier 2	Reporting Path Tier 3	In GAOI
010798	COMMANDANT CG 1B1 010798	1B1-20201201	25	3	3	100%	Y	N	05		COMMANDANT 000748	COMMANDANT CG 00 008650	COMMANDANT CG 09 008651	N

- 8.5.4 Click **Download Summary** to download an Excel spreadsheet with the displayed summary.
- 8.5.5 Click **Download Detail** to download a detailed Excel spreadsheet with accounting statuses for each personnel designation type in the specified Dept ID.
- 8.5.6 The **Hide Filter** link and subsequent **Show Filter** link work the same as with the "All Coast Guard Report", described in section 10.1.
- 8.5.7 To clear the search criteria, click the **Reset** button.

8.5.8 Click the **Reports** tab to return to the main “Reports” page.

8.6 All Dept ID Report by Dept ID

This report shows the PA accounting numbers for a single Dept ID, and optionally, for its reporting path up the chain of command.

8.6.1 Click the **All Dept ID Report by Dept ID** link under the **Reports** tab. The “PA All Dept ID Report by Dept ID” page will appear:

8.6.2 Click the **Event** drop-down list and select an event.

8.6.3 Enter a **Dept ID** in the **Dept ID** box.

8.6.4 Click the **Include Hierarchy** box to display numbers for the department ID and all subordinate departments.

8.6.5 Click the **View Summary** button to display a table similar to the following:

Dept ID	Unit Name	Event Name	Total Assigned	Total Affected	Acct. For	% Acct. For	Dept ID All Acct. For	Acknowledged	Reporting Path Tier 1	Reporting Path Tier 2	Reporting Path Tier 3	In GAOI
Total		SEC ST PETERSBURG EXERCISE	1080	162	162	100%	Y	N				
000240	CG STA SABINE 000240	SEC ST PETERSBURG EXERCISE	161	1	1	100%	Y	N	COMMANDANT 000748	COMMANDANT CG 00 008650	COMMANDANT CG 09 008651	N
004101	OL DIRAUX SOUTH NEW YORK 004101	SEC ST PETERSBURG EXERCISE	17	1	1	100%	Y	N	COMMANDANT 000748	COMMANDANT CG 00 008650	COMMANDANT CG 09 008651	N

8.6.6 Click **Download Summary** to download an Excel spreadsheet with the displayed summary.

8.6.7 Click **Download Detail** to download a detailed Excel spreadsheet with accounting statuses for each personnel designation type in the specified Dept ID.

8.6.8 The **Hide Filter** link and subsequent **Show Filter** link work the same as with the “All Coast Guard Report”, described in section 10.1.

8.6.9 To clear the search criteria, click the **Reset** button.

8.6.10 Click the **Reports** tab to return to the main "Reports" page.

8.7 All Dept ID Report by Hierarchy

This report shows the PA accounting numbers for all Dept IDs under a selected point in the Coast Guard chain of command. Choose a starting point by selecting a combination of tiers.

8.7.1 Click the **All Dept ID Report by Hierarchy** link under the **Reports** tab. The "PA All Dept ID Report by Hierarchy" page will appear:

8.7.2 Click the **Event** drop-down list to select an event.

8.7.3 Click the **Tier 1** drop-down list to choose a "Tier 1" Command.

8.7.4 If desired, click the "Tier 2" and "Tier 3" drop-down lists to choose a command for each; these are optional.

8.7.5 Click the **% Accounted For** drop-down list to select a filter setting of 100%, less than 100%, or 0%.

8.7.6 Click the **View Summary** button and a table similar to the following will appear:

Dept ID	Unit Name	Event Name	Total Assigned	Total Affected	Acct. For	% Acct. For	Dept ID All Acct. For	Acknowledged	District	Sector	Reporting Path Tier 1	Reporting Path Tier 2	Reporting Path Tier 3	In GAOI
Total		SEC ST PETERSBURG EXERCISE	730	156	156	100%	Y	Y						
007488	SECTOR ST PETERSBURG 007488	SEC ST PETERSBURG EXERCISE	2	1	1	100%	Y	Y	07	19	COMMANDANT 000748	COMMANDANT CG 00 008650	COMMANDANT CG 09 008651	N
007489	SEC ST PETE CMD CADRE 007489	SEC ST PETERSBURG EXERCISE	21	3	3	100%	Y	Y	07	19	COMMANDANT 000748	COMMANDANT CG 00 008650	COMMANDANT CG 09 008651	N

8.7.7 Click the **Download Summary** button to download an Excel spreadsheet with the displayed summary.

8.7.8 Click the **Download Detail** button to download a detailed Excel spreadsheet with accounting statuses for each personnel designation type, in each Dept ID.

- 8.7.9 The **Hide Filter** link and subsequent **Show Filter** link work the same as with the "All Coast Guard Report", described in section 10.1.
- 8.7.10 To clear the search criteria, click the **Reset** button.
- 8.7.11 Click the **Reports** tab to return to the main "Reports" page.

8.8 Accounting Roster by Event and Dept ID Report

This report provides a roster of personnel affected by a selected event who are assigned to a Dept ID, including or excluding its hierarchy. It is produced in an Excel file format only.

- 8.8.1 Click the **Accounting Roster by Event and Dept ID** button under the **Reports** tab. The "Accounting Roster by Event and Dept ID" window will appear:

- 8.8.2 Click the **Event** drop-down list and select an event for which you want a report.
- 8.8.3 Enter a 6-digit **Dept ID** in the **Dept ID** box (i.e. don't forget leading zeroes, if necessary).
- 8.8.4 Click the **Include Hierarchy** checkbox, if desired.
- 8.8.5 Click the **Download Excel** link to save the accounting roster for this event to an Excel spreadsheet. The following report is similar to one you would see:

Accounting Roster: California Earthquake & Tsunami, for Dept ID 006374 and all Dept IDs under it										
As of 20 Mar 2018 at 1720 PDT										
Nam	Is a sponso	Accounting Status	Designation	Titlr	Paygrad	Dept ID	Command	Civilian Sub Or	Date Last Accounted	Last Accounted By
ALLEN,	TRUE	Safe and Not Displaced	Active Duty/FTS		MEE5	006374	CGC HALIBUT (006374)		3/14/2018	Test, Christine
ALLEN,	FALSE	Not Accounted For	Family Member		MEE5	006374	CGC HALIBUT (006374)		3/14/2018	Test, Christine
ALLEN,	FALSE	Safe and Displaced	Family Member		MEE5	006374	CGC HALIBUT (006374)		3/14/2018	Test, Christine
BROOKS,	TRUE	Unreported	Active Duty/FTS		MEE7	006374	CGC HALIBUT (006374)		3/1/2018	Test, Christine
BROOKS,	FALSE	Not Affected	Family Member		MEE7	006374	CGC HALIBUT (006374)			Test, Christine
WRIGHT,	FALSE	Not Affected	Family Member		MEE7	006374	CGC HALIBUT (006374)			Test, Christine
COWAR,	TRUE	Unreported	Active Duty/FTS		MEE7	006374	CGC HALIBUT (006374)		3/1/2018	Test, Christine

- 8.8.6 If desired, click the **Reset** button to clear out the values you have entered.
- 8.8.7 Click the **Reports** tab to return to the main "Reports" page.

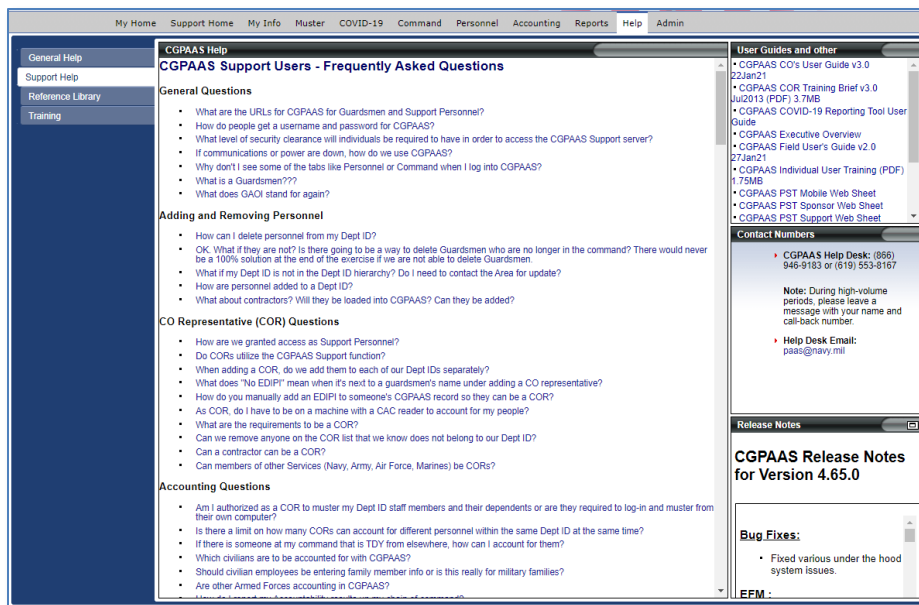
9 Help Tab

The **Help** tab is a good place to go for a lot of useful information and links to even more useful information.

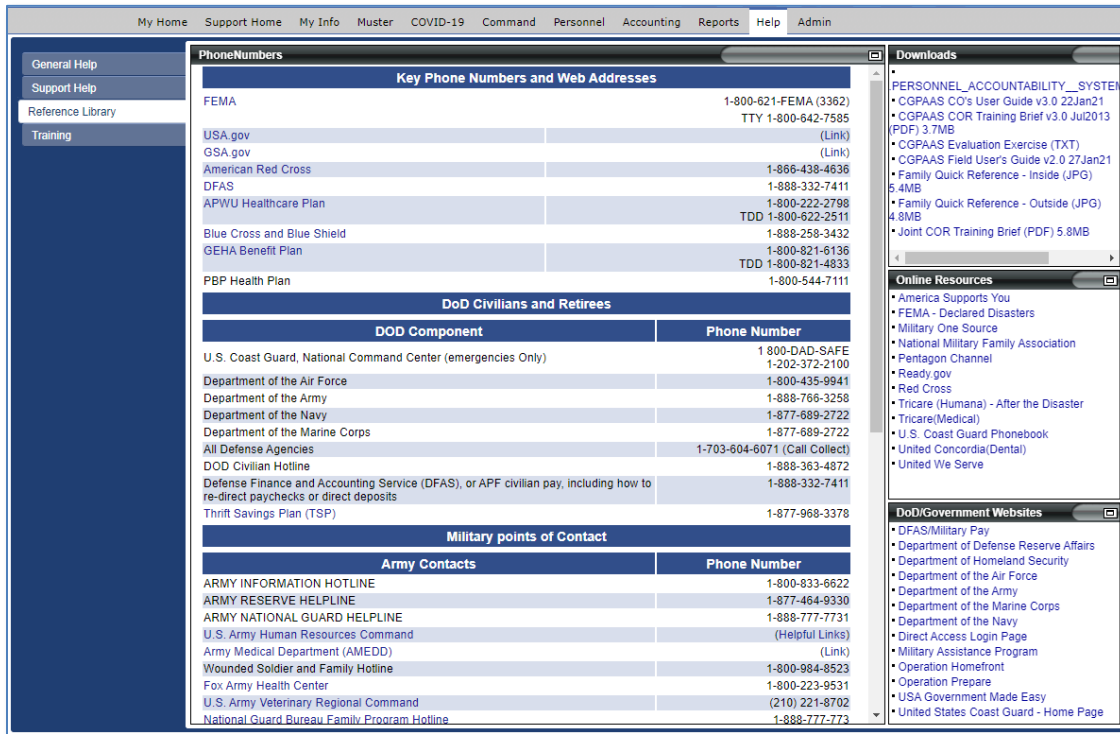
- 9.1 Click the **Help** tab. The first sub tab you will see is **General Help**. Several scrollable panes of information are displayed:



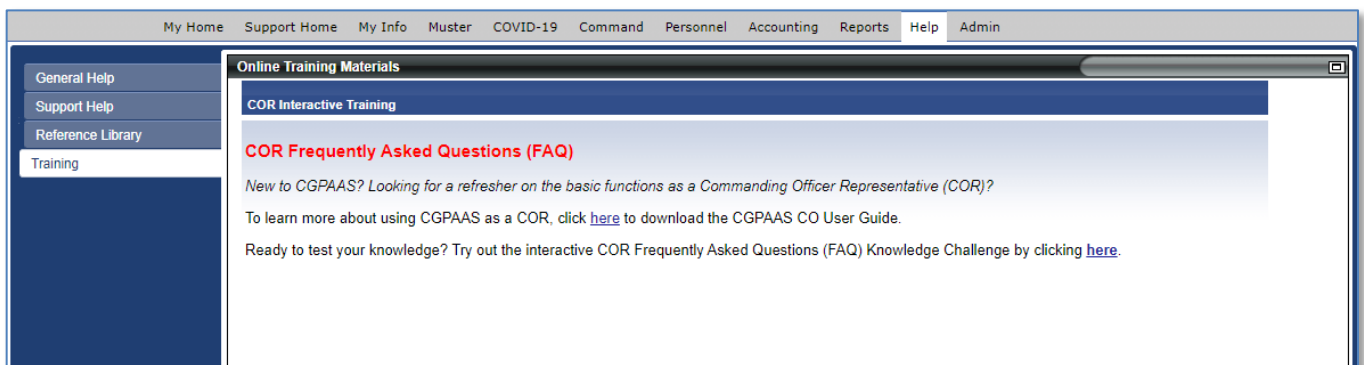
- a. Click any of the links to either open another window with a website, or to view or download a file.
 - b. Click the small icon (📄) in the upper-right corner of a pane if you want to “detach it”, i.e. cause it to open in a new browser window.
- 9.2 Click the **Support Help** sub tab. The **Help** tab offers help in 4 different panes: “CGPAAS Help”, “User Guides and other Downloads”, “Contact Numbers”, and “Release Notes”:



9.3 Click the **Reference Library** sub tab. Key cross-service contact details and several scrollable panes of information are displayed:



9.4 Click the **Training** sub tab. The **Training** tab offers Online Training Materials which includes Interactive Frequently Asked Questions (FAQ) and Computer Based Training (CBT) for CORs. CORs may complete this training and receive a printable certificate upon completion.



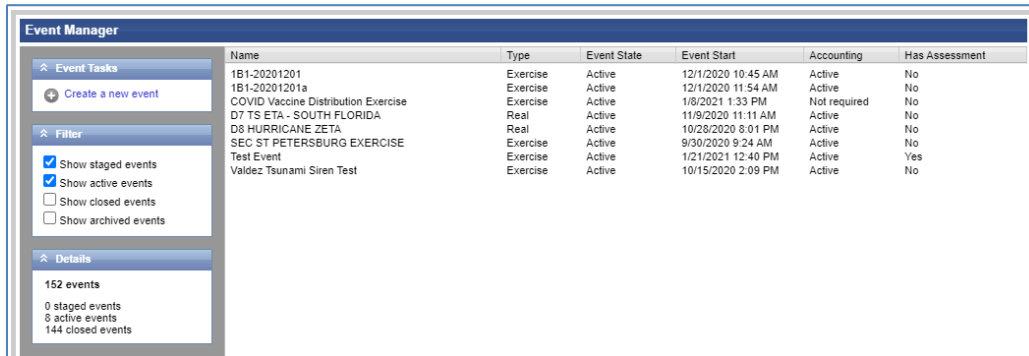
10 Admin Tab (District CORs or CGHQ Users)

This tab is available only for users who are District CORs or CGHQ users. It allows these personnel to manage events and population within a Geographical Area of Interest (GAOI).

10.1 Event Manager

Under the **Admin** tab the first screen displayed is the “Event Manager” with “Event Tasks”, “Filter”, and “Details” panes on the left.

The “Event Tasks” pane displays links depending on the state of an event. The “Filters”



pane allows you to choose the type of events to be displayed. The “Details” pane displays information about an event that you clicked.

- Click the double arrows to minimize (collapse) or maximize (expand) the panes.
- Sort the list of events by their columns, by clicking the column titles.

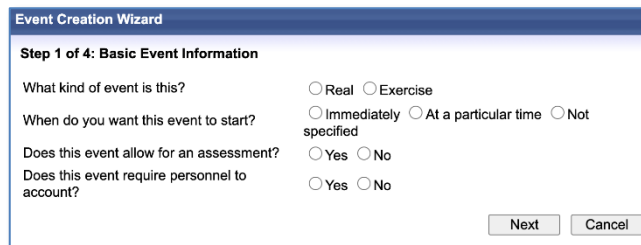
10.1.1 Create a New Event

There are 4 steps to create a New Event.

- To get started, click the **Create a new event** link in the “Event Tasks” pane.

10.1.2 Create a New Event Step 1, Basic Event Information

When a District COR or CGHQ user first clicks the **Create a new event** link, an **Event Creation Wizard** window will pop up in a new window to prompt for specific information. There are 4 initial questions displayed in step 1:



- Click the circle next to the type of event you are creating: **Real** or **Exercise**.
- Click the circle next to when you want the event to start. If you clicked **At a particular time**, additional prompts will be displayed.

Event Creation Wizard

Step 1 of 4: Basic Event Information

What kind of event is this? Real Exercise

When do you want this event to start? Immediately At a particular time Not specified

What day will the event start?

What time of day will the event start? 00 Pacific

Does this event allow for an assessment? Yes No

Does this event require personnel to account? Yes No

Next Cancel

- a. Click inside the box by **What day will the event start?** And a calendar will pop up where you will click the start date.
- b. Click the arrows by the hour to specify when the event will start (00-23).
- c. Click the drop-down list to select the time zone when the event will start.
3. Click the circle that answers if you want this event to allow for an assessment.
4. Click the circle that answers if you want this event to require personnel to account.
 - a. Click the circle that answers when the accounting will start. If you clicked **At a particular time**, additional prompts will be displayed.

Event Creation Wizard

Step 1 of 4: Basic Event Information

What kind of event is this? Real Exercise

When do you want this event to start? Immediately At a particular time Not specified

What day will the event start?

What time of day will the event start? 00 Pacific

Does this event allow for an assessment? Yes No

Does this event require personnel to account? Yes No

When do you want the accounting to start? When Event Starts At a particular time Not specified

What day will the accounting start?

What time of day will the accounting start? 00

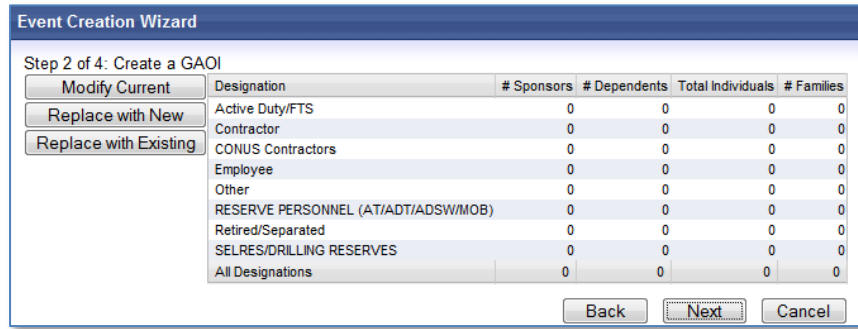
Do you want the accounting scheduled to stop? At a particular time Not specified

Next Cancel

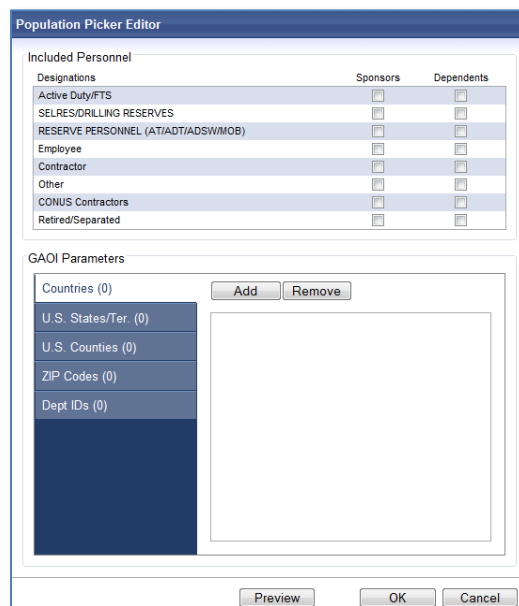
- b. Click inside the box by **What day will the accounting start?** And a calendar will pop up which you will use to click the start date.
- c. Click the arrows by the hour to indicate when the event will start (00-23).
- d. Click the circle that answers if you want to schedule a time for the accounting to stop.
- e. Click inside the box by **What day will the accounting stop?** And a calendar will pop up which you will use to click the start date.
- f. Click the arrows by the hour to indicate when the event will stop (00-23).
5. Click the **Next** button to continue the Event Creation Wizard. Step 2 will be displayed.

10.1.3 Create a New Event Step 2, Create a GAOI

In step 2, a user will create a Geographical Area of Interest (GAOI). There are 3 buttons in this step, on the left.

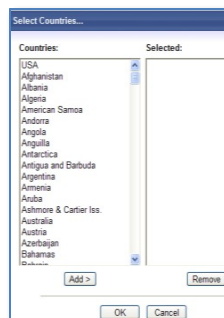


10.1.3.1 Click the **Modify Current** button to specify which groups of personnel will be affected by the event. The **Population Picker Editor** pane is displayed:



10.1.3.2 In the **Included Personnel** section, click the appropriate checkboxes for the **Sponsors** and **Dependents** who will be affected by the event.

10.1.3.3 In the **GAOI Parameters** section, highlight a parameter on the left (e.g., countries, states, counties, zip codes, or Department IDs) and then click the **Add** button.



10.1.3.4 Scroll up or down to locate the country, state, etc. you want to add for this event. Click a country, state, etc., to highlight it and select it. If you want to select more than one entry,

hold the CTRL key down as you click multiple entries.

- 10.1.3.5 Click the **Add>** button to include the countries, states, etc. in the event.
- 10.1.3.6 If necessary, click the **Remove** button to remove an entry, from the event.
- 10.1.3.7 While still in the “Select Countries...”, or “Select Zip Codes” ..., etc., window, click the **OK** button. The “Population Picker Editor” pane will be displayed again.
- 10.1.3.8 Click the **Preview** button to view the populations of the designated Sponsors, dependents, total individuals, and families, who will be affected by the event. If a designation was not selected, or if the value is 0, 0 will be displayed.

Designation	# Sponsors	# Dependents	Total Individuals	# Families
Active Duty/FTS	43,196	0	43,196	43,196
Contractor	4	0	4	4
CONUS Contractors	0	0	0	0
Employee	8,973	0	8,973	8,973
Other	0	0	0	0
RESERVE PERSONNEL (AT/ADT/ADSW/MOB)	0	0	0	0
Retired/Separated	0	0	0	0
SELRES/DRILLING RESERVES	0	0	0	0
All Designations	52,173	0	52,173	52,173

- 10.1.3.9 Click the **OK** button when finished. The “Population Picker Editor” pane will be displayed again.
- 10.1.3.10 Click the **OK** button. Step 2 of 4 in the Event Creation Wizard will be displayed again.
- 10.1.3.11 Click the **Replace with New** button to replace an event’s GAOI parameters. The same screens and buttons as seen in step a, **Modify Current**, are available.
- 10.1.3.12 Click the **Replace with Existing** button to select an existing population from another event that will be affected by the event.

Name	Associated Event
05DEC14 SoCal Flooding	
23435	23435
27Apr2014 tornado	27Apr2014 tornado
ALJ TEST D13	ALJ TEST D13
Air Station Los Angeles July 2 Test	Air Station Los Angeles July 2 Test
Air Station Los Angeles test	Air Station Los Angeles test
Base Hono 03 September	
Base Miami Beach Roster - All	
Base Miami Recall Revision	Base Miami Recall Revision
CA Great Shakeout Drill	CA Great Shakeout Drill
CG 1B1 Test	CG 1B1 Test
CG-1B Test	CG-1B Test
CG-1B1 Test(1)	CG-1B1 Test
CG-1B1 test	
CG1B1 TEST	CG1B1 TEST

- 10.1.3.13 Click an event population.
- 10.1.3.14 Click the **Preview** button to show the designated numbers of Sponsors, dependents, total individuals, and families.
- 10.1.3.15 Click the **OK** button on the “Preview” screen.
- 10.1.3.16 Click the **OK** button on the “Select an existing Population” screen to accept the population of the chosen event. Step 2 of 4 will be displayed again.
- 10.1.3.17 Click the **Next** button to continue the **Event Creation Wizard**. Step 3 will be displayed.

10.1.4 Create a New Event Step 3, Name and Description

In this step a user will provide the name and description for an event:

- 10.1.4.1 Enter a **name** for the event.
- 10.1.4.2 Enter a short name for this event (up to 20 characters).
- 10.1.4.3 Provide a brief description of this event.
- 10.1.4.4 Click the Next button. Step 4 will be displayed.

10.1.5 Create a New Event Step 4, Summary

In this step a user will review the information provided for an event:

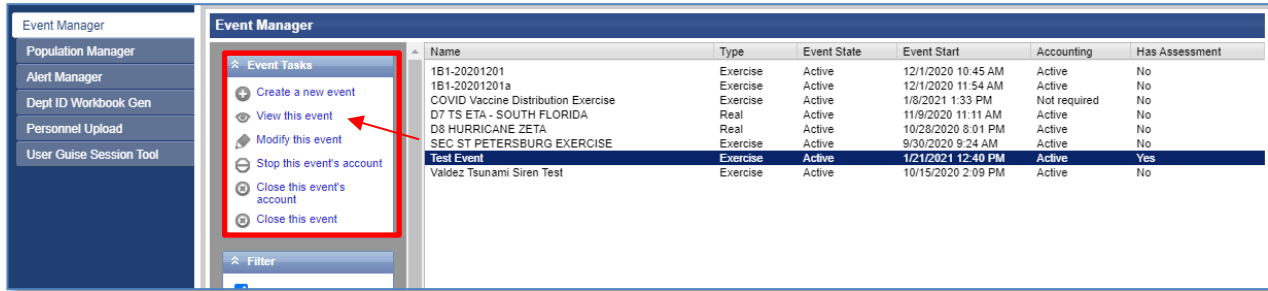
- 10.1.5.1 Click **Back** to go back to step 3 to make any changes, or click **Cancel** to cancel creating the event, or click **Finish** to finish creating the event. Clicking the **Finish** button will display a window to let you know the event has been created.

- 10.1.5.2 Click the **Close** button.

10.1.6 View this Event

To see any of several links to tasks for a particular event, you must first click one of the events seen under the **Name** column.

- a. Click an event and a list of links to tasks is now shown on the left.

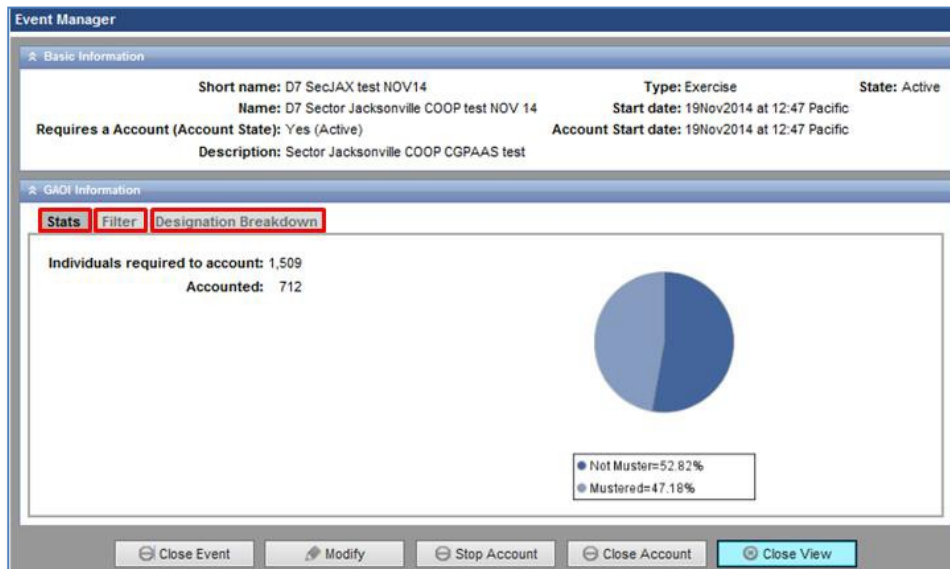


The links seen under **Event Tasks** differ based on the state of the event state, though they will be similar. States include Active, Stopped, and Staged.

- b. Click the View **this event** link to view information about an event. What you see is covered next.

10.1.7 GAOI Information Tabs

Under the **Admin** tab, if you click the **Event Manager** menu item on the left, highlight a listed event and then click the **View this event** link, you will see 3 tabs at the top of the “GAOI Information” pane:



- 10.1.7.1 The “Stats” tab (shown above) displays the current number of individuals to be, or who have been, accounted for.
- 10.1.7.2 The “Filter” tab displays the Included Personnel and GAOI Parameters.
- 10.1.7.3 The “Designation Breakdown” tab displays the Sponsors, dependents, total individuals, and families who meet the original filter criteria for an event, by designation (whether they have to account or not):

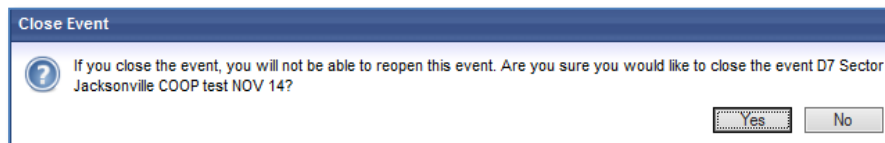
GAOI Information				
Stats Filter Designation Breakdown				
Designation	# Sponsors	# Dependents	Total Individuals	# Families
Active Duty/FTS	357	824	981	358
Contractor	0	0	0	0
CONUS Contractors	0	0	0	0
Employee	15	12	27	15
Other	0	0	0	0
RESERVE PERSONNEL (AT/ADT/ADSW/MOB)	189	312	501	189
Retired/Separated	0	0	0	0
SELRES/DRILLING RESERVES	0	0	0	0
All Designations	561	948	1509	562

10.1.8 Event Action Buttons

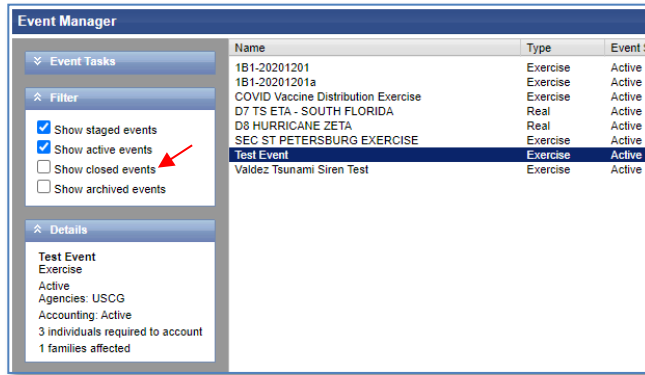
Under the **Admin** tab, if you click the **Event Manager** menu item on the left, highlight a listed event and then click the **View this event** link, you will see several buttons at the bottom of the “GAOI Information” pane which allow you to take action on the event. The buttons available to you depend on the state of the event.

The screenshot shows the 'Event Manager' window. The 'Basic Information' section includes: Short name: D7 SecJAX test NOV14, Name: D7 Sector Jacksonville COOP test NOV 14, Type: Exercise, State: Active, Requires a Account (Account State): Yes (Active), Start date: 19Nov2014 at 12:47 Pacific, Account Start date: 19Nov2014 at 12:47 Pacific, and Description: Sector Jacksonville COOP CGPAAS test. The 'GAOI Information' section shows a 'Designation Breakdown' table (same as above) and a pie chart. The pie chart shows 'Not Mustered=52.82%' and 'Mustered=47.18%'. At the bottom, there are five buttons: 'Close Event', 'Modify', 'Stop Account', 'Close Account', and 'Close View'.

10.1.8.1 **Close Event** button – click this to close the event. A message prompts you to click **Yes** or **No**:

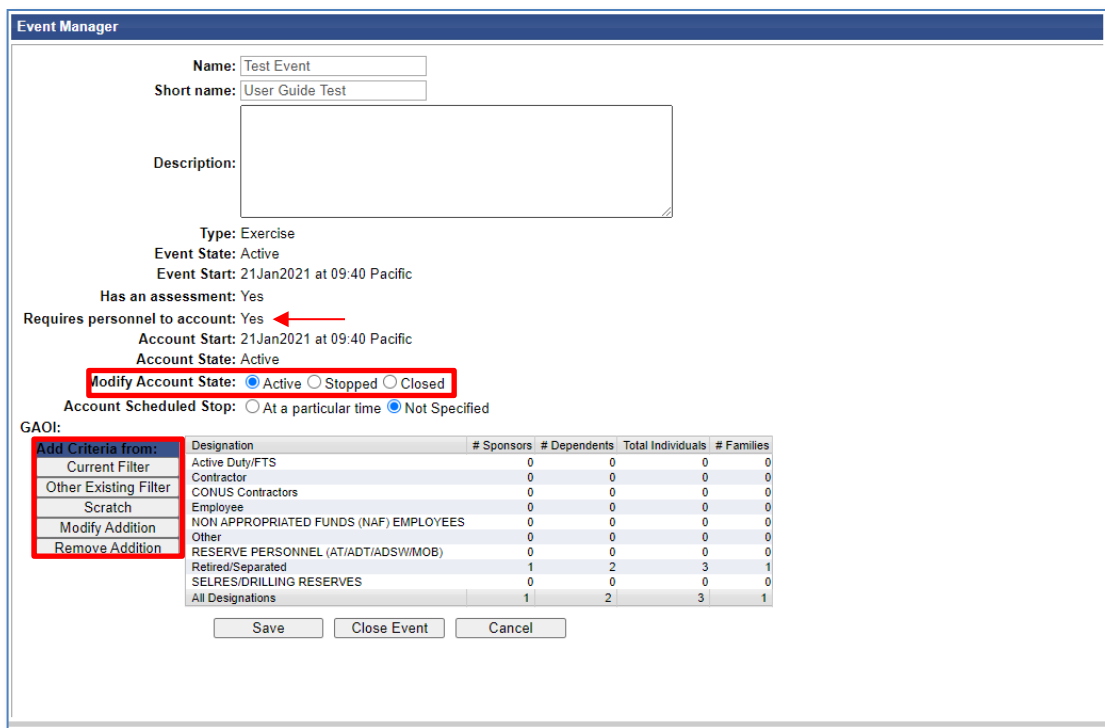


10.1.8.2 If you click **Yes**, you cannot reopen the event to modify it. The basic information will now show **State: Closed**. To display the closed event again later, go to the “Filters” pane seen when you first open the “Event Manager” and click the box next to “Show Closed Events” to display closed events:



10.1.8.3 If you click No, the event remains open, and the previous screen is displayed.

10.1.8.4 Click the Modify button to edit information about the event:



10.1.8.5 If “Requires personnel to account” is set to **Yes**, then you will be able to modify the account state of the event. Click the appropriate circle (**Active**, **Stopped**, or **Closed**) to modify the account state.

10.1.8.6 To modify the current filter, click the **Current Filter** button. This will display the “Population Picker Editor” pane

10.1.8.7 To use GAOI parameters from an existing population, click the **Other Existing Filter** button.

10.1.8.8 To provide a new population filter, click the **Scratch** button. This will display the “Population Picker Editor” pane

10.1.8.9 To modify existing GAOI Parameters, click the **Modify Addition** button. This will display the “Population Picker Editor” pane.

- 10.1.8.10 Click the **Remove Addition** button to remove any changes previously made using the **Modify Addition** button.
- 10.1.8.11 To save your work regarding the Accounting State, Included Personnel, and/or GAOI Parameters, click the **Save** button.
- 10.1.8.12 To terminate and not save any changes, click the **Cancel** button.
- 10.1.8.13 To close the event, click the **Close Event** button. (See step **a** above).
- 10.1.8.14 **Start Account** button – will only be displayed if accounting had stopped. Click this button if you want to start the accounting process.
- 10.1.8.15 **Stop Account** button – will only be displayed if accounting had started. Click this to stop the accounting process.
- 10.1.8.16 **Close Account** – click this to permanently stop the accounting process for this event.
- 10.1.8.17 **Close View** button – click this to return to the previous screen.

10.1.9 Modify an Event

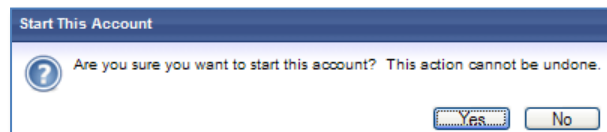
To modify the details of an existing event, click the event in the “Event Manager” pane.

- 10.1.9.1 Click the **Modify this Event** link under the list of Event Tasks.

10.1.10 Start an Event's Account

To start the accounting for an existing event, the event accounting must have been stopped. In this case, click the event in the “Event Manager” pane.

- 10.1.10.1 Click the **Start this event's account** link under the list of Event Tasks.



- 10.1.10.2 Click the appropriate button, **Yes** or **No**, to start the accounting for the event.

10.1.11 Stop an Event's Account

To temporarily stop the accounting for an existing event, the event accounting must be on-going. In this case, click the event in the “Event Manager” pane.

- 10.1.11.1 Click the **Stop this event's account** link under the list of Event Tasks. Because this link only stops accounting temporarily, accounting can be turned back on later.



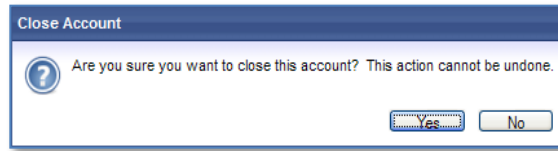
- 10.1.11.2 Click the appropriate button **Yes** or **No** to temporarily stop the accounting for the event.

10.1.12 Close this Event's Account

To permanently stop the accounting for an existing event, click the event in the “Event

Manager” pane.

- 10.1.12.1 Click the **Close this event's account** link. With this link, accounting cannot be turned back on later.

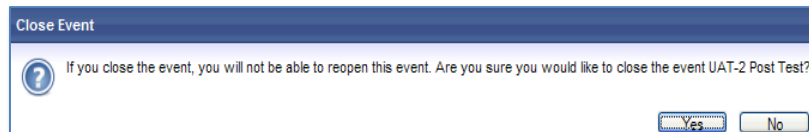


- 10.1.12.2 Click the appropriate button **Yes** or **No** to close the accounting for the event.

10.1.13 Close this Event

To permanently close an existing event, click the event in the “Event Manager” pane.

- 10.1.13.1 Click the **Close this event** link. With this link, the event may not be turned back on later.

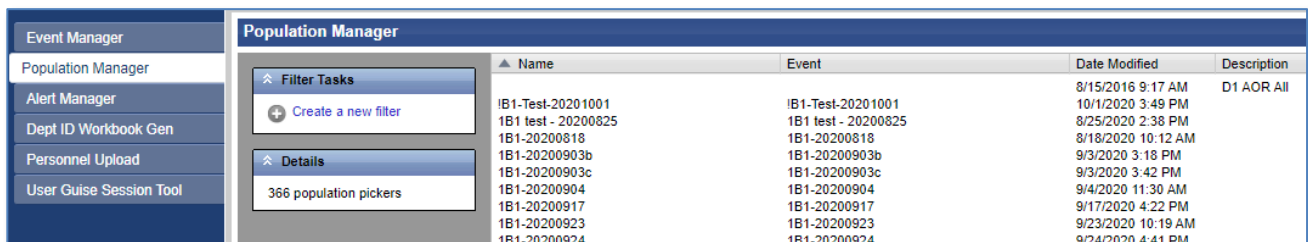


- 10.1.13.2 Click the appropriate button **Yes** or **No** to close the event.

10.2 Population Manager

The **Population Manager** menu item is found under the **Admin** tab. It allows you to create a new filter, for identifying personnel based on selected criteria, or to view or edit an existing filter. The filter may or may not be used to identify people affected by an event, and it can also be used to identify people affected by more than one event.

- 10.2.1.1 Under the **Admin** tab, click the **Population Manager** menu item. This will display the “Population Manager” window with “Filter Tasks” and “Details” panes on the left:



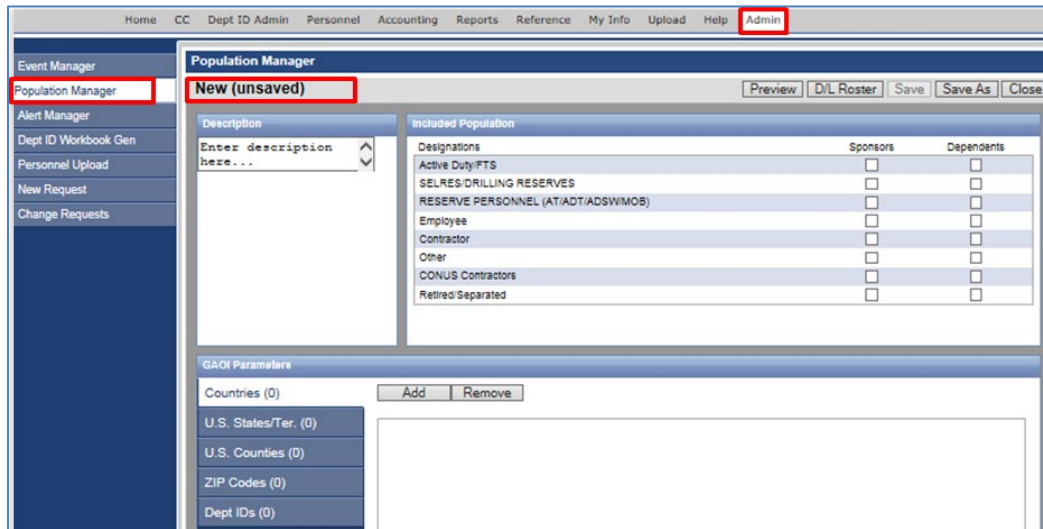
- 10.2.1.2 Click any of the column titles to sort the list of filters by their name, name of the event that uses the filter, date modified, or description.

- 10.2.1.3 Click the double arrows to minimize (collapse) or maximize (expand) the panes.

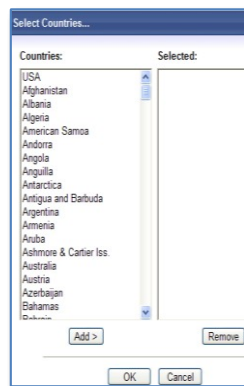
10.2.1 Create a New Population Filter

A population filter allows you to select filter criteria to identify the personnel within a geographical area. To create a population filter, you simply click the **Create a new filter** link under “Filter Tasks”.

- a. Click the **Create a new filter** link under “Filter Tasks”. A “New (unsaved)” pane will appear:



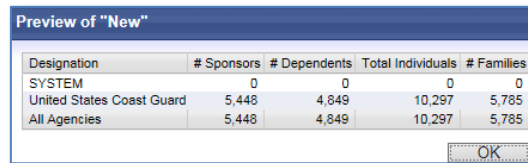
1. In the “Description” pane, enter a **short name** for this filter.
2. In the “Included Population” pane, click the boxes next to the **Sponsors** and **Dependents** who will be affected by the event.
3. In the “GAOI Parameters” pane, highlight a parameter on the left (e.g., countries, states, counties, zip codes, or Department IDs) and then click the **Add** button.



- i. Scroll up or down to locate the country, state, etc., you want to add for this event. Click a country, state, etc., to highlight it and select it. If you want to select more than one entry, hold the CTRL key down as you click multiple entries.
- ii. Click the **Add>** button to include the countries, states, etc. in the event.
- iii. If necessary, highlight an entry and then click the **Remove** button to remove the entry from the event.
- iv. While still in the “Select Countries...”, or “Select Zip Codes...”, etc. window, click

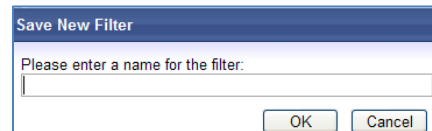
the **OK** button. The Population Manager will be displayed again.

4. Click the **Preview** button to view the populations of the designated Sponsors, dependents, total individuals, and families who will be affected by the event. If a designation was not selected, or if the value is 0, 0 will be displayed.



Designation	# Sponsors	# Dependents	Total Individuals	# Families
SYSTEM	0	0	0	0
United States Coast Guard	5,448	4,849	10,297	5,785
All Agencies	5,448	4,849	10,297	5,785

5. Click the **OK** button when finished. The Population Manager will be displayed again.
6. Click the **D/L Roster** button to download the list of Sponsors to an Excel spreadsheet with several columns including Agency, Name, Sponsor Name, Pay Grade, UIC, Command Name, and Designation, and more.
7. In the Population Manager click the **Save** or **Save As** button to save the changes you made to the Population Manager filter. You will be prompted for a filter name:

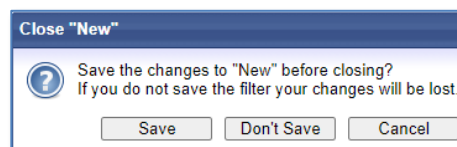


Save New Filter

Please enter a name for the filter:

OK Cancel

- i. Enter a **name**.
 - ii. Click the **OK** button.
8. In the Population Manager, click the **Close** button to return to the main page. If the filter has not been saved yet, you will be prompted to save the filter.
 - i. Click the appropriate button to **Save**, **Don't Save**, or **Cancel** your updates to the filter.

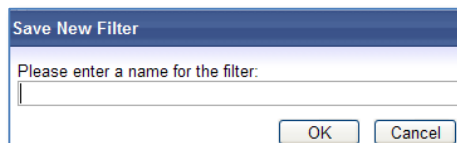


Close "New"

Save the changes to "New" before closing?
If you do not save the filter your changes will be lost.

Save Don't Save Cancel

- ii. If you clicked the **Save** button, you will be prompted for a filter name.



Save New Filter

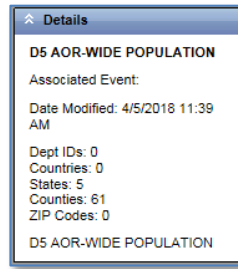
Please enter a name for the filter:

OK Cancel

- iii. Enter a **name** and click the **OK** button.
 - iv. Click the **Close** button and on the main Population Manager page, your new filter is displayed on the bottom of the list.
9. In the Population Manager click the **Name** column header to sort the filters alphabetically.

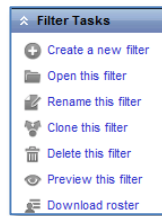
10. Click a particular Population filter to display information in the "Details" pane on the

left side of the Population Manager window.



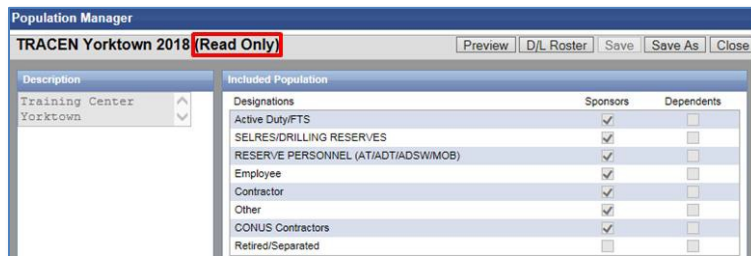
10.2.2 Filter Tasks

In the Population Manager, when you click an existing filter, there are several links under the "Filter Tasks" pane. The number of links depends on who created the filter. If you created a filter, you would have 7 links:

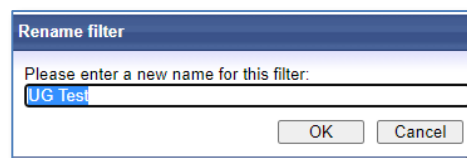


With filters that were created by others, you will only have access to 5 links, i.e. you won't see **Rename this Filter** or **Delete this filter**.

- 10.2.1.4 Click the **Create a new filter** link to create another population filter.
- 10.2.1.5 Click the **Open this filter** link to modify an existing filter. If you created the filter, you would have access to the same features you had when you created the filter. If someone else created the filter, it will be read only, as shown next:

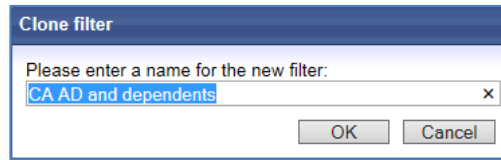


- 10.2.1.6 If you created a filter, you will see the **Rename this filter** link. Click this link to give a new name to the filter:

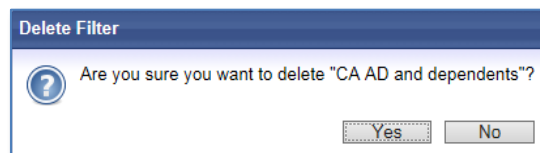


- 10.2.1.7 Enter another name for the filter, and then click the **OK** button.

- 10.2.1.8 If you want to keep the same name, click the **Cancel** button.
- 10.2.1.9 Click the **Clone this filter** link to make a copy of an existing filter without creating a new one from the beginning. You will be prompted for a new name.



- 10.2.1.9.1 Enter a **new name** for the filter.
- 10.2.1.9.2 Click the appropriate button, **OK** or **Cancel**.
- 10.2.1.10 Click the **Delete this filter** link to remove the filter from the list. (This is only available if you created the filter.)



- 10.2.1.10.1 Click the appropriate button **Yes** or **No** to delete the filter.
- 10.2.1.11 Click the **Preview this filter** link to view the identified Sponsors and dependents associated with this filter:

Designation	# Sponsors	# Dependents	Total Individuals	# Families
SYSTEM	0	0	0	0
United States Coast Guard	5,448	4,849	10,297	5,785
All Agencies	5,448	4,849	10,297	5,785

- 10.2.1.11.1 Click the **OK** button to close the preview pane.
- 10.2.1.12 Click the **Download roster** link to view an Excel file with a list of Sponsors. This has the same function as the **D/L Roster** button seen when you open a filter, covered in 16.2.1.

10.3 Alert Manager

The **Alert Manager** menu item, found under the **Admin** tab, is used to manage and publish alerts. When you first click the **Alert Manager** menu item on the left, you will see 3 menu items under the heading “Alert Publisher”: **Publish Alert**, **Alert Management**, and **Alert Admin**.

10.3.1 Publish Alert

The **Publish Alert** menu item allows you to set up and manage alerts. With this tool you can set your target audience, manage how and when personnel receive the alerts, and view the content automatically created for the alert messages.

- 10.3.1.1 Click the **Publish Alert** menu item under the “Alert Publisher” heading.

The “New Alert” pane is displayed, with 4 sections.

10.3.2 Targeting Pane

The “Targeting” pane is used to specify the group associated with an event that will receive the alerts.

- Click the **Select Event** drop-down list to choose an event.
- Click the appropriate circle to **Notify** either “Unreported Personnel”, “Support Users of Unreported Personnel”, or “Unaffected Sponsors with affected Dependents”. Unreported Personnel are those who have not been accounted for and Support Users are the CORs who have unreported personnel within their Dept ID. Unaffected Sponsors with affected Dependents are those Sponsors who may, for example, be out of the affected area, but who have dependents who are in the affected area.

10.3.3 Devices Pane

The “Devices” pane is used to designate how the population will be alerted. Any one or more of the devices may be selected.

- 10.3.3.1 Click the checkbox next to “Work Email” and/or “Alternate Email” to send alerts via email.
- 10.3.3.2 Click the checkbox next to “Mobile Phone” to send a text message.
- 10.3.3.3 Click the checkbox next to “Home Phone”, “Work Phone”, and/or “Mobile Phone” to send alerts via phone.
- 10.3.3.4 Click the **Show Phone Options** link to view options regarding when the population will be contacted:

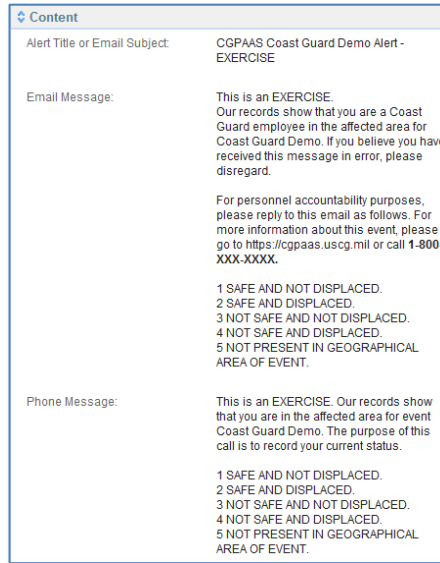
- 10.3.3.5 Click the first drop-down list to select the number of times you want the system to attempt to contact a user.
- 10.3.3.6 Click the second drop-down list to specify the hours and minutes you want between calls.

10.3.4 Content Pane

The “Content” pane displays the message to be sent in alerts. In the “Content” pane, the Alert Title or Email Subject is automatically provided. It is created using the event name between “CGPAAS” and “Alert – EXERCISE”.

The message differs depending on the chosen device, but it will be shown for any or all selected types of devices, phone, email, or mobile phone.

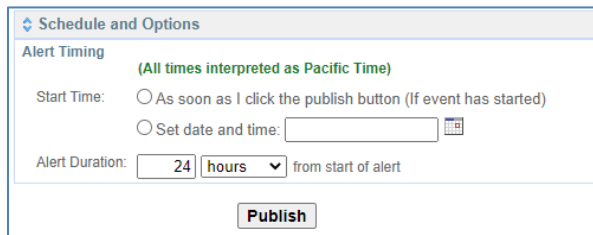
In the next picture only work email and home phone were selected for the “Coast Guard Demo” event.



10.3.5 Schedule and Options

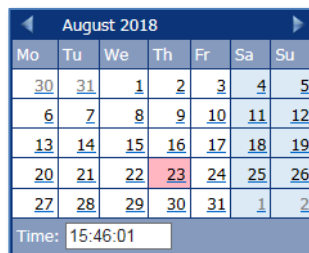
In the “Schedule and Options” pane, you specify the date and time when the alert will be sent.

10.3.5.1 Set the time, in one of 2 ways:



10.3.5.2 Click **As soon as I click the publish button (if event has started)** to start the alert right away.

10.3.5.3 You may also specify a future date by clicking **Set date and time** and clicking the calendar icon to display a calendar in a new window. You will click a date on the calendar and enter the time using a 24-hour format (hh:mm:ss).



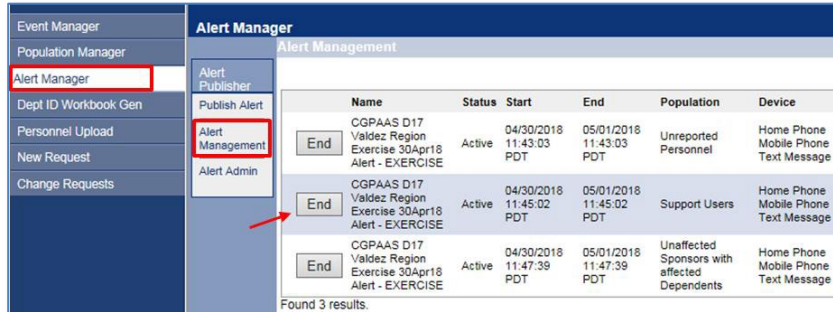
10.3.5.4 Enter the Alert Duration, number of hours, minutes, or days, and then click the drop- down list to select the unit in hours, minutes, or days.

10.3.5.5 Click the **Publish** button when you are finished. A message indicates that you will be redirected to the main page.

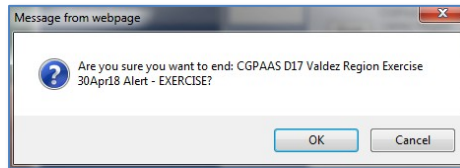
10.3.6 Alert Management

Using the **Alert Management** menu item, under **Alert Manager**, you have the ability to view a list of alerts and, if desired, to end an alert.

10.3.6.1 Click the **Alert Management** menu item under the “Alert Publisher” heading. The published alerts are displayed.



10.3.6.2 To end an alert, click the **End** button.

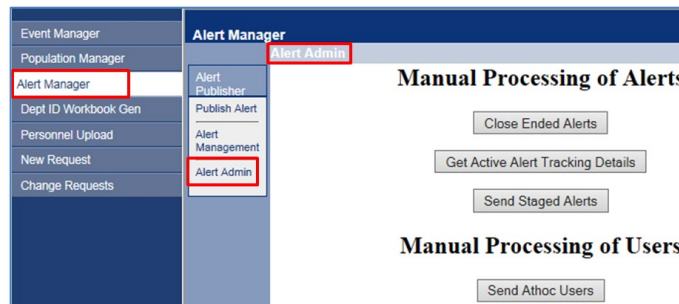


10.3.6.3 Click the appropriate **OK** or **Cancel** button to terminate the alert.

10.3.7 Alert Admin

With the **Alert Admin** menu item, you can close alerts that have ended.

10.3.7.1 Click the **Alert Admin** menu item under the “Alert Publisher” heading to administer alerts. The “Alert Admin” pane is displayed, with 4 buttons:

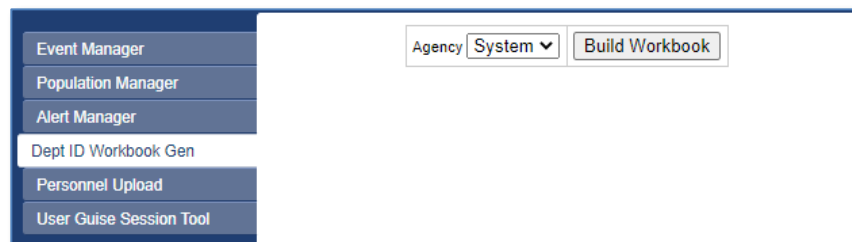


10.3.7.2 Click the **Close Ended Alerts** button to close all alerts that have ended. Once alerts are closed, they cannot be re-opened later.

- 10.3.7.3 The **Get Active Alert Tracking Details** button causes CGPAAS to begin pulling responses from the server in order to populate accounting summaries which you can see under the **Accounting** tab.
- 10.3.7.4 Click the **Send Staged Alerts** button to re-send alerts that are in the “staged” status.
- 10.3.7.5 The **Send Athoc Users** button is not used.

10.4 Dept ID Workbook Gen

The **Dept ID Workbook Gen** menu item, found under the **Admin** tab, allows the CGHQ user to build a detailed Department hierarchy of the USCG in an Excel spreadsheet:



- 10.4.1 With USCG selected in the **Agency** drop-down list, click the **Build Workbook** button. This will generate a very large spreadsheet with the hierarchy of the USCG.

This works the same as the **Dept ID Excel Download** menu item under the **Dept ID Admin** tab. **CAUTION:** The spreadsheet could take a while to generate and download.

10.5 Personnel Upload

Though you may see the **Personnel Upload** menu item under the **Admin** tab, only the CGHQ user type has permissions to use it. This allows the CGHQ to manually upload a list of Foreign National or CONUS Contractor personnel assigned to a Dept ID. The uploaded personnel will appear in the accounting tools, and the personnel list, and will be capable of self-accounting; but they will be excluded from assessment, case management and any official reporting.

- 10.5.1 Click the **Personnel Upload** menu item under the **Admin** tab and the “Upload Personnel” page will be displayed:

Personnel Upload

Personnel Upload Tool

The purpose of this tool is to allow CORs to manually upload a list of Foreign National or CONUS Contractor personnel assigned to a Dept ID. The personnel uploaded here will appear in the accounting tools, and the personnel list, and will be capable of self-accounting; but they will be excluded from assessment, case management and any official reporting. To upload personnel, simply follow the steps below.

Step 1: Download the Excel spreadsheet template

The spreadsheet provides you with the proper structure for the data. Do not modify the structure of the spreadsheet (e.g. column name, column order, sheet name, etc.). Any modifications to the structure of the spreadsheet will cause it to be *rejected when uploaded*. You may save the file locally on your PC and rename it. The file MUST be saved in .xls (Excel 97-2004) format.

[Download Template](#)

Step 2: Fill in the spreadsheet

Review the Data Definition Document (linked below) prior to entering data into the spreadsheet. When the spreadsheet is uploaded, the data will be validated against those rules. *If any portion of the data is invalid, the upload will be rejected.* Please read the rules carefully to understand what is required for a successful upload.

[Go To Data Definition](#)

Step 3: Upload the spreadsheet

Once personnel data has been entered into the spreadsheet, you may upload the file here. When you submit the file for upload, it will be validated against the rules specified in the Data Definition Document. If any of the data is invalid, you will

11 Acronyms

CAC	Common Access Card
CBT	Computer Based Training
CGFM	Coast Guard Family Member
CGHQ	Coast Guard Headquarters
CGPAAS	Coast Guard Personnel Accountability and Assessment System
CO	Commanding Officer
COR	Commanding Officer Representative
EDIPI	Electronic Data Interchange Personal Identifier
FAQ	Frequently Asked Question
FORCECOM	Force Readiness Command
GAOI	Geographical Area of Interest
ID	Identification
OCONUS	Outside the Continental United States
OPCOM	Operational Command
PA	Personnel Accountability
PDF	Portable Document Format (Adobe Acrobat file format)
POC	Point of Contact
T1CO	Tier 1 Commanding Officer (CGPAAS User Type)
TDY	Temporary Duty
Dept ID	Department ID
USCG	United States Coast Guard

12 Annexes

12.1 CGPAAS New Features Slick Sheet

CGPAAS | **Coast Guard Personnel**
Accountability & Assessment System

NEW FEATURES IN CGPAAS

There are new and improved site features in CGPAAS! These new features incorporate updated and intuitive technology to ease the login and site navigation experience.


- **Unified Log-In Page:**
The two "Click Here" buttons of the past have been replaced with a single sign-on window that allows you to choose between **PIV/CAC** and **Limited Access**.


 - **PIV/CAC Access** – Allows all Support level users (formerly CGPAAS CORS and Administrators) to perform duties for COR, Command & Area Admin, Personnel Accountability, Analysis & Reporting, Case Management, & tracking and other related tasks.
 - **Limited Access** – Logging in with Username and Password allows access to update information for individuals and their family as formally labeled "Coast Guard Military, Civilians, and Active Duty Dependents".

- **Simplified Tabs**
The site navigation (known as the "Tabs") has been restructured and reorganized. This new feature includes "last login" date/timestamp visibility and combined functions on new module specific tabs for Support Users.

These new centralized tabs include:

 - **Muster** - *My Muster, Daily Roster, Command Muster*
 - **Command** – *All COR User Types*
 - **Help** – *General Help, Support Help, Reference Library, Training*
 - **Admin** – *Tier 0 Users*





NEW FEATURES IN CGPAAS

12.2 CGPAAS PST Mobile App View Slick Sheet

CGPAAS Coast Guard Personnel
Accountability & Assessment System

HOW-TO PERSONNEL STATUS TRACKER (PST)
MOBILE WEB APP VIEW

1. Navigate to <https://cgpaas.uscg.mil> on your mobile device, enter your username and password, and click "Log In".

Unclassified//For Official Use Only

CGPAAS

Username Primary Email

Password Password

Initial password is the sponsor's Date of Birth and last 4 of their SSN (Foreign Nationals use 0000 for the last 4 of their SSN), e.g. 10/002240321

I don't know my password and/or username

Log In

Help

Click here to access the non-mobile version

Technical Support:
paas@nara.mil
1-800-940-9180
618-633-8187

→

COVID-19 Status

Please update your status.

DOC J TRAINING
Requires updating/verification

Continue

2. Click on your name.

Please set your current Personnel Status and Work Status below.

Personnel Status

Unreported

Unsure of which status to choose? See the Personnel Status Definitions.

Work Status

Unknown

Unsure of which status to choose? See the Work Status Definitions.

Notes

e.g. related information

↙

3. Update your status in both the Personnel Status and the Work Status fields.

TIP: Click on the *definitions* link on the status update window for personnel status and work status definitions.

4. When finished updating, click on the **SAVE** button to save changes then select "Logout" to exit.

DOC J TRAINING

Please set your current Personnel Status and Work Status below.

Personnel Status

Unreported

Unsure of which status to choose? See the Personnel Status Definitions.

Work Status

Unknown

Unsure of which status to choose? See the Work Status Definitions.

Notes

e.g. related information

→

Accounting Status

You are NOT indicated in NFAAS as being affected by an event.

If you have been impacted by an event, please contact your Command or CDR.

You nor your family are required to account or provide any further information.

If you need more information please log into NFAAS from a personal computer or contact your Command or CDR.

If you do not have access to a personal computer, you can [click here](#) to view the non-mobile version of NFAAS for more information.

Please click the continue button to update and/or verify your contact information.

Continue

Back

Logout

HOW-TO PERSONNEL STATUS TRACKER (PST)
MOBILE WEB APP VIEW

12.3 CGPAAS PST Sponsor Web View Slick Sheet

CGPAAS Coast Guard Personnel
Accountability & Assessment System

HOW-TO PERSONNEL STATUS TRACKER (PST)
SPONSOR WEB VIEW

1. Direct your browser to <https://cgpaas.uscg.mil> and login as Coast Guard Military, Civilians, and Active Duty Dependents (button on the left). Login with CAC/PIV or username/password is permitted.

2. Click on the My Info tab.

3. Click on the Status Tracker tool from the left bar navigation.

4. Click on the Update button on the right, next to Sponsor or Family Member name

Name	Personnel Status	Work Status	
Selina Kyle	Unreported	Unknown	→ Update
Bruce Wayne	Unreported	N/A	Update

5. Fill in the Status Tracker form.

*** All fields are required**

Update Status

Selina Kyle

Personnel Status: (see definitions for more information)

Quarantined

Location:

USA

PDC Phone #

Phone Number

Work Status:

Unknown

Working On-Site

Working Off-Site

Not Working

Note:

TIP: Click on the ? Help button on Family Status Tracker or the [Personnel Status: \(see definitions for more information\)](#) link on the status update window for personnel status definitions.

6. When finished updating, click on the Update button to save changes.

HOW-TO PERSONNEL STATUS TRACKER (PST) SPONSOR WEB VIEW

CGPAAS CO's User Guide v3.1


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12.4 CGPAAS PST Support Web View Slick Sheet

CGPAAS Coast Guard Personnel
Accountability & Assessment System

HOW-TO PERSONNEL STATUS TRACKER (PST)
SUPPORT USER WEB VIEW

1. Insert your CAC/PIV card into a reader, direct your browser to <https://cgpaas.uscg.mil>.
2. Login as CGPAAS CORS and Administrators (button on the right).
3. Click on the COVID-19 tab.
4. Use the filter tools on the left to search for a servicemember or group of servicemembers by PAS code, Personnel Status, Work Status, Name, DoD ID, Designation or Sponsors/Family Members.



7. Fill in the Status Tracker form.

* All fields are required

5. Browse the filtered results on the right

Sponsor	Family Member	Category	Personnel Status	Work Status	Updated By	Unit Code	Unit Name
Salina Pate (5011)		DDO Employee	Unreported	Unknown	Update	000000	System Default UC
Salina Pate (5011)	Brad Payne	DDO Employee	Unreported	NA	Update	000000	System Default UC

6. Click on the Update button next to a person's name to update their status.

Update Status

Salina Kyle

Personnel Status: (see definitions for more information)
Quarantined

Location:
 USA
 City: [] State: [] Postal Code: []

POC Phone #
 Phone Number: []

Work Status:
Unreported
 Working On-Site
 Working Off-Site
 Not Working

Note:
 []

TIP: Click on the personnel status Help button in the filter tool or the [definitions](#) link on the status update window for personnel status definitions.

8. When finished updating, click on the Update button to save changes.

Update Cancel

Personnel Status: (see definitions for more information)

HOW-TO PERSONNEL STATUS TRACKER (PST) SUPPORT USER WEB VIEW