

# Case Management System (CMS) Users Guide 24 Sep 09

This guide provides detailed CMS user information to facilitate the most efficient use of CMS. CMS is a case management system used for entering, tracking, resolving and reporting on pay and personnel related cases within the United States Air Force. It was developed to give base-level offices the ability to communicate with all levels of the Air Force to resolve problems with member's computer records that can not be resolved by directly updating the various pay or personnel systems. It also provides a tracking capability that enables all levels (Base, MAJCOM, AFPC, ARPC, NGB, AFRC, AFFSC, DFAS, and Air Staff) to perform management oversight. Finally, the embedded reporting system, using a central database, can be used to monitor trends in all types of pay and personnel cases.

## RECENT CHANGES:

- 10Nov08 revised para 2.2.2 to add following exception to viewing cases opened by another MPF/MAJCOM: **"(EXCEPTION: At the request of the BPOs, you cannot view any type Evaluation case, Humanitarian or EFMP case using this procedure. Only the agencies at the base that creates these type cases and the Base AD POC agency can view the case).**
- 20Apr09 added following note to Para 4.5.3 (Deleting Cases): **NOTE: Only "open" cases can be deleted. If a case is closed, you must reopen the case in order to "delete" the case.**
- 24Sep09 revised Para 4-18 to read: **"Closing Cases. (NOTE: Only the Agency where the case is currently assigned can "Close" cases).** This further clarifies that you must log into CMS as the agency where the case is currently assigned to "Close".

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## ACRONYMS

ACCS .....Automated Case Control System	HQ ..... Headquarters
AF/DP .....HQ AF Chief of Staff, Personnel	MAJCOM ... Major Command
AFPC .....Air Force Personnel Center	MIPDS ..... Military Personnel Data System
AFAFO .....Air Force Accounting & Finance Office	MPF ..... Military Personnel Flight
DFAS .....Defense Finance & Accounting Service	OPR ..... Office of Primary Responsibility
DJMS .....Defense Joint Military Pay System	PAS ..... Personnel Accounting Symbol
DSN .....Defense Switched Network	PCS ..... Permanent Change of Station
FSO .....Financial Services Office	POC ..... Point of Contact

SAF/FM .....SecAF Financial Mgmt & Comptroller  
SQL .....Structured Query Language

SSN ..... Social Security Number

## **1. CMS Philosophy**

### **1.1. Development of CMS.**

1.1.1. AFPC and AFAFO initially developed CMS to respond to pay problems experienced after AFPC deployed MilPDS in June 2001. However, over time, the CMS application has been expanded to document/work issues other than “pay problems”.

1.1.2. Senior leadership wanted a system that would allow base-level offices to input, track and report on cases. It would also allow MAJCOMs and Base-level managers to provide oversight to resolving personnel/pay cases. Finally, it would also provide a consolidated reporting capability for MAJCOMs and HQ AF/DFAS level management.

### **1.2. Customer Support Design.**

1.2.1. AFPC designed the system to enable the One-Stop Customer Support concept.

1.2.2. One-Stop Customer Support is defined as follows. A member only needs to identify and explain the personnel/pay problem he/she is experiencing one time. If the agent/agency the member contacts first can't correct the problem on the spot, a case is entered into CMS and referred to whatever agency can work it properly. This eliminates the bouncing of members from office to office attempting to find the right person to resolve the problem.

1.2.3. CMS design also ensures that CMS meets the data needs for oversight by managers at base, MAJCOM, and AF levels.

1.2.3.1. Bases have MPF/FSO Tiger Teams that meet weekly to review problem cases and identify solutions. CMS forms the core of information to identify cases that require attention.

1.2.3.2. MAJCOMs have Integrated Process Teams to oversee the resolution of problem cases within their command. CMS provides data for that oversight.

1.2.3.3. AFPC and AFAFO, in coordination with DFAS, use CMS to work cases and identify trends to assist in applying resources appropriately.

### **1.3. Central Authoritative Data Source.**

1.3.1. CMS provides one central repository for identifying, tracking, resolving, and reporting personnel and pay problems.

1.3.2. With the inclusion of the Automated Case Control System (ACCS) cases in CMS (implemented in May 03), Personnel and Finance leadership have a single system to both manage and report on personnel and pay problems members are experiencing.

1.3.3. In quarterly meetings the AF Personnel/Pay Council reviews progress toward eliminating pay problems from the AF using CMS data.

#### **1.4. Processing Timelines (Does not apply to PPA/Evaluation Type CMS Cases).**

1.4.1. CMS embeds the processing timelines that were established by SAF/FM and AF/A1 through the Personnel/Pay Council of 45 days from problem identification to resolution.

1.4.1.1. Base-level case processing is limited to five days, to include the time prior to forwarding to AFPC or DFAS and the time after a case is returned for closure.

1.4.1.2. AFPC case processing is limited to 20 days cumulatively.

1.4.1.3. DFAS case processing is limited to 20 days cumulatively.

1.4.2. Cases are identified as overdue (stagnant) when they exceed these guidelines. They are based on an integrated scale using age of case and time assigned to the particular office. The older the case, the less time is allowed for the case to be assigned to the office before it is considered overdue.

1.4.2.1. Timelines Used by CMS to Determine a Case is Overdue.

<u>Case Age</u> .....	<u>Goes Overdue</u>
120 days .....	As it arrives at the office
> 90 days .....	At 5 days
> 75 days .....	At 7 days
> 60 days .....	At 10 days
> 45 days .....	At 15 days
> 0 days .....	At 20 days

## **2. Overview of CMS.**

### **2.1. System Design.**

2.1.1. CMS is a web enabled SQL database homed at AFPC. It is structured around the servicing MAJCOM & MPF relationship. All members serviced by the MAJCOM & MPF are aligned to those agencies as cases are created.

2.1.2. Agencies are divided into four distinct agency role levels, each having different capabilities:

First      Base-level POC

Second Base-level OPR  
Third MAJCOM OPR  
Fourth AFPC, ARPC & DFAS (HQ level).

2.1.2.1. **First** level agency role is **Base POCs**. They have access to all cases input by the base agencies, can enter cases, refer cases referred to them to other base-level agencies, and can refer cases above base-level. They can also close cases when they are complete. The MAJCOM POC has the authority to grant Base POCs the capability to (1) create/delete users accounts at base-level and (2) delete/reopen cases when circumstances warrant (i.e., delete cases entered with the wrong SSN or duplicate cases.) If a case has been closed more than 5 days, only the Base POC with this authority can reopen it.

2.1.2.2. **Second** level agency role is **Base OPRs**. They can enter cases, refer them to base-level agencies, refer them above base-level, and close them when completed. They can view all cases, but cannot delete cases nor manage user accounts.

2.1.2.3. **Third** level agency role is **MAJCOM OPRs**. They view cases entered at any base owned by that MAJCOM and have access to reports covering the entire MAJCOM. MAJCOM OPRs that have CMS Account Maintenance capability can create, edit and delete user accounts and extend Account Maintenance management capability to Base POCs.

2.1.2.4. **Fourth** level agency role is **AFPC, ARPC & DFAS (HQ level)**. They can enter, refer, review, and indicate that action is complete on a case. They can only close cases that are entered by that specific agency. They have view capability for all cases, and reports capability across the entire database.

## **2.2. Case Flow Control (Review, View, and Update).**

2.2.1. Cases are assigned to a single agency and can be reviewed only by that agency. The review process is distinct from the view and update processes. Only users with an account for the agency where the case is assigned can review the case (if multiple accounts, user must be log into the agency where case is assigned) which allows them to edit, Refer, Close, or Action Complete a case. The review function allows the user to edit most of the identification information in the case, to add comments and attachments to the case, and to refer the case to another agency. This supports the concept that a case is owned by only one agency at a time and prevents the confusion that would exist if others could take action and refer a case not assigned to them.

2.2.2. The view function allows all users, no matter where the case is assigned, to look at but not change data in the case. **NOTE:** To view cases on personnel not assigned to your MPF/MAJCOM you must use the "*Enter/Update/Request Status on a Case*" function, not the "*Case Lookup*" function. Simply enter the member's SSAN in the "Members SSAN" block and click on "Update/Request Status" button. The next screen will display all cases pertaining to this member. Then click on the "View" link to view the case. (EXCEPTION: At the request of the BPOs, you cannot view any type Evaluation case, Humanitarian or EFMP case using this procedure. Only the agency at the base that creates these type cases and the Base AD POC agency can view the case).

2.2.3. The update function allows all users, no matter where the case is assigned, to add comments and attachments to the case, but not to change any other information or to refer the case elsewhere. **NOTE:** To add an update to cases on personnel not assigned to your MPF/MAJCOM you must use the "Enter/Update/Request Status on a Case" function, not "Case Lookup" function. Simply enter the member's SSAN in the "Members SSAN" block and click on "Update/Request Status" button. The next screen will display all cases pertaining to this member. The next screen will display the open cases on this member. Under the "Action" column, click on "Update or Request Status" link, enter any comments and then click on the "Request Status" or "Update" button to save your comments. Also, the next screen will give you the opportunity to add attachments to this case.

### **3. CMS Access Controls.**

#### **3.1. AFPC Secure Role.**

3.1.1. To access CMS a user must have an AFPC Secure account. Access is also restricted to CAC users.

3.1.2. Any AF Military, AF Civilian employee or other users (military members of other services, contractors, other country national, etc.) can request an AFPC Secure user account on-line at the AFPC Secure web site by providing sufficient personal information to ensure that they are properly identified. The AFPC Secure web site address is [https:// https://w20.afpc.randolph.af.mil/afpcsecure](https://w20.afpc.randolph.af.mil/afpcsecure)

#### **3.2. CMS Access.**

3.2.1. Access to CMS must be requested through the individual's CMS OPR. At base-level, CMS OPRs are normally the Base POCs. They can create and delete user accounts for their base when authorized by the MAJCOM OPR. At the MAJCOM, CMS OPRs are normally the MAJCOM POCs. They can create and delete user accounts for their MAJCOM and base-level and can assign CMS OPR accounts maintenance capability for Base POCs. At HQ level (AFPC and DFAS) OPRs with CMS Accounts Maintenance capability are identified and can create and delete user accounts within their user area.

3.2.1.1. POCs are responsible for keeping accounts current and for deleting them when an agent no longer requires access to CMS. Having CMS users' in- and out-process through the CMS POC would help POCs perform this vital function.

3.2.1.2. PCS: It is critical that accounts be deleted when an agent goes PCS, even if they will require access to CMS at their new duty location. New cases are aligned based on the user profile information. If an agent uses an old CMS account at their new location, the case will be aligned to their old base creating considerable confusion. See [User Account Maintenance](#) at paragraph 4.3 for instructions.

3.2.2. Users can have more than one account at more than one level if their job responsibilities warrant multiple accounts. EXAMPLE 1: A MAJCOM OPR may have a MAJCOM level account and also hold base-level accounts that allow oversight of those subordinate operations. EXAMPLE 2: An MPF Superintendent may have an account for each work center in the MPF to oversee their activity.

3.2.3. The CMS Functional Manager manages OPR accounts for HQ level (AFPC and DFAS) and MAJCOM OPR level accounts that have Accounts Maintenance capability.

#### 4. Using CMS. (To enter a new case, see paragraph 4.2.1.4.)

##### 4.1. Logging On to CMS.

4.1.1. Log on through AFPC Secure via <https://w20.afpc.randolph.af.mil/afpcsecure> (see picture below).

The screenshot shows the AFPC Secure web portal. At the top left is the Air Force Personnel Center logo. The top right contains navigation links: "My Stuff | Privacy & Security Policy | Contact". Below the logo is the text "AIR FORCE PERSONNEL CENTER" and "AFPC Secure". A secondary navigation bar includes "CAC and DoD PKI Information", "Read FAQ", "Create UserID/Password", and "Logout". The main content area is divided into two columns. The left column, titled "Welcome, User...", contains a section for "Your current AFPC Secure e-mail address is:" with the email "Robert.Brinson2.ctr@Randolph.AF.MIL" and a "Phone Number:" field with "665-4998". Below this is a link "Click here to update your information". The right column, titled "Available Applications...", includes a "Top Viewed Sites" link and a table of applications. The table has two columns: "Click Here..." and "Application Title...". The applications listed are ASINet (Authorized Service Interruption Tracking System), CMS (Case Management System), and NDAWNET (National Disaster Accountability Web). Below the table is an "Application List Display Preferences" section with "Use Paging:" set to "No" and "# Items per Page:" set to "10". At the bottom left, a "Message Center..." section contains a bullet point: "FOR USERS STILL USING GMAIL.AF.MIL E-Mail addresses to create accounts: Please ensure GMAIL account already exists or you will not receive AFPC Secure initial account creation F-Mails."

4.1.2. AFPC Secure presents a list of programs that the individual has authority to use. Click on the CMS button.

4.1.2.1. Single Account. If the user has a single CMS account, the CMS Homepage for the assigned agency is displayed.

4.1.2.2. Multiple Accounts (see picture below). If the user has multiple accounts, a list of all authorized accounts is presented. The user clicks on the "Select" button and the CMS Home Page will appear for the agency name selected. If the CMS users have "accounts maintenance" capability for the agency selected, then the user clicks on the "Select" button and user will be given the opportunity to select another agency name from the drop down menu and then clicks on "Select Agency" button. **NOTE:** Accounts with "Accounts Maintenance" capability will have a check mark in the "POC" block. The "Superuser" account is limited to CMS Functional Manager and a limited number of trusted agents. This account allows the user to emulate any CMS agency; therefore, this user can work any case assigned to any CMS agency AF-wide.

**AIR FORCE PERSONNEL CENTER** GRAND FORKS AFB ND (AMC)  
Base AD FSO  
Select Responsibility

Home Page Reports My Responsibilities My Profile Exit

SELECT RESPONSIBILITY						
Agency Name	SuperUser	POC	Role	MPF	Cases	
Base AD Casualty Office	<input type="checkbox"/>	<input type="checkbox"/>	Base OPR	GOODFELLOW AFB TX (AETC)	0	Select...
Base AD Career Development Section	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	GOODFELLOW AFB TX (AETC)	3	Select...
Base AD AFOSI/Reg 7 Commander	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	YOKOTA AB JAPAN (PACAF)	0	Select...
<b>Base AD FSO</b>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Base OPR</b>	<b>GRAND FORKS AFB ND (AMC)</b>	<b>10</b>	Select...
Base AD CSS Operations Spt Sq	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	GRAND FORKS AFB ND (AMC)	1	Select...
Base AD CSS Medical Support Sq	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	SCOTT AFB IL (AMC)	0	Select...
MAJCOM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MAJCOM OPR	HILL AFB UT (AFMC)	0	Select...
CMS Functional Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AFPC/DFAS	RANDOLPH AFB TX (AFPC)	0	Select...
ARPC Enlisted Promotions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AFPC/DFAS	ARPC DENVER	45	Select...
DFAS RC Indianapolis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AFPC/DFAS	DFAS INDIANAPOLIS IN (DFAS)	62	Select...

Home Page Exit Application

## 4.2. The CMS Homepage.

4.2.1. The homepage is divided into seven sections;

First: Links (see [4.2.1.1.](#))

Second: Opening Banner (see [4.2.1.2.](#))



- Third: Summary of Cases Requiring Action (see [4.2.1.3.](#))
- Fourth: Enter/Update/Request Status on a Case (see [4.2.1.4.](#))
- Fifth: Case Lookup (see [4.2.1.5](#))
- Sixth: CMS Reports (see [4.2.1.6.](#) and [4.26.](#))
- Seventh: List of Important Links (see [4.2.1.7.](#))

4.2.1.1. The FIRST section normally contains four links; “Home Page”, “Reports”, “My Profile” and “Exit”. Users authorized to add/delete user accounts will see “Accounts” and users with multiple accounts will also see the “My Responsibilities” link.



**AIR FORCE  
PERSONNEL CENTER**

**GRAND FORKS AFB ND (AMC)**  
Base AD CSS Operations Spt Sq  
CMS Home Page



4.2.1.1.1. The “Home Page” link takes the user directly to the CMS Home Page from anywhere in the application.

4.2.1.1.2. The “Reports” link takes the user to a page with many pre-formatted reports. See paragraph 4.26 for a complete explain on CMS Reports.

4.2.1.1.3. The “Accounts” link opens the User Accounts Maintenance page for those that have CMS OPR management capability assigned to the account they are currently logged into. See [User Account Maintenance](#) at paragraph 4.3.

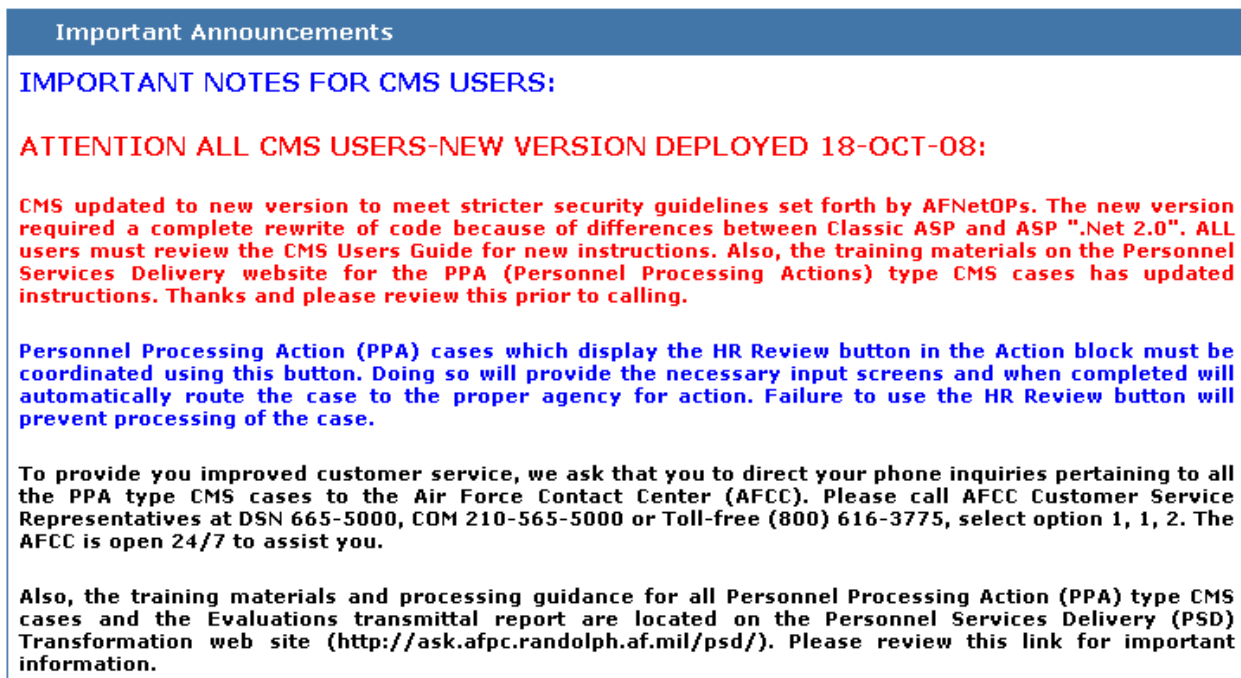
4.2.1.1.4. The “My Responsibilities” link is only available for users with multiple accounts. Clicking that link will return to the page that allows the user to select a different account. See [Multiple Accounts](#) at paragraph 4.1.2.2.

4.2.1.1.5. The "My Profile" link takes the user to a page that allows them to view their personal information pertaining to their CMS account. They may edit their e-mail address, phone number and DEROS/DOS/RNLTD information. **NOTE:** Please keep this information current! Failure to have current information will adversely affect the timeliness of cases. E-mail address and phone numbers are particularly important since they facilitate contact between users of CMS as they resolve the more complex cases. The DEROS/DOS/RNLTD information was added to aide the POCs with deleting accounts. Name, Duty Title, and Grade must be updated by the Base POC (member can update only their e-mail info, duty phone number and DEROS/DOS/RNLTD). This information is appended to each case when the user makes a change to the case and provides contact information to subsequent agents should there be a question regarding the case. Also, Email Notification (see picture below). This block allows the user to elect to receive an Outlook email advising that a CMS case was just referred to their agency. This handy option should be used by those folks who receive occasional CMS cases.

Email Notification:  **Notify me when a case is referred to my agency. Make sure your email address above is correct.**

4.2.1.1.6. The "Exit" link exits CMS.

4.2.1.2. The SECOND section is the opening banner (see picture below). It's used to communicate from CMS management to all users. Included are system updates, scheduled down times, problems, etc. and the date last updated. Information is ordered so that the latest information is at the top.



**Important Announcements**

**IMPORTANT NOTES FOR CMS USERS:**

**ATTENTION ALL CMS USERS-NEW VERSION DEPLOYED 18-OCT-08:**

**CMS updated to new version to meet stricter security guidelines set forth by AFNetOPs. The new version required a complete rewrite of code because of differences between Classic ASP and ASP ".Net 2.0". ALL users must review the CMS Users Guide for new instructions. Also, the training materials on the Personnel Services Delivery website for the PPA (Personnel Processing Actions) type CMS cases has updated instructions. Thanks and please review this prior to calling.**

**Personnel Processing Action (PPA) cases which display the HR Review button in the Action block must be coordinated using this button. Doing so will provide the necessary input screens and when completed will automatically route the case to the proper agency for action. Failure to use the HR Review button will prevent processing of the case.**


**To provide you improved customer service, we ask that you to direct your phone inquiries pertaining to all the PPA type CMS cases to the Air Force Contact Center (AFCC). Please call AFCC Customer Service Representatives at DSN 665-5000, COM 210-565-5000 or Toll-free (800) 616-3775, select option 1, 1, 2. The AFCC is open 24/7 to assist you.**

**Also, the training materials and processing guidance for all Personnel Processing Action (PPA) type CMS cases and the Evaluations transmittal report are located on the Personnel Services Delivery (PSD) Transformation web site (<http://ask.afpc.randolph.af.mil/psd/>). Please review this link for important information.**

4.2.1.3. The THIRD section is "Summary of Cases Requiring Action," also known as CMS in-boxes (see example below). **NOTE:** This section is only visible when cases are assigned to your agency. This is where a user can locate cases actually assigned to his/her agency and work those cases. An agency can have up to three in-boxes (Referred, Action Complete and Follow) each divided into four sections (Read, Unread, Overdue, and Total). Clicking on the number produces a list of cases in that in-box. The list can then be sorted by any of the columns by clicking on the heading. **NOTE: The cases assigned to the "Overdue" in-box should be given "priority" processing.**

SUMMARY OF CASES REQUIRING ACTION				
Status/Type	Read	Unread	Overdue	Total
Referred	1		1	1
Action Completed		1	1	1
Follow	1		1	1

**NEW FEATURES WHEN OPENING THE 'REFERRED', 'ACTION COMPLETED' AND 'FOLLOW' CASES:** The "sort" function has been expanded, an "Export to Excel" feature added and a new "Filter" option added. You can now sort columns by simply clicking on the column heading. First click will sort ascending, click twice to sort descending and a third click will remove this sort. The "filter" option was added to allow the user to only view certain cases (i.e. by "Problem Type", "Grade" "Category" or "Date Opened". For example if you just want to view cases based on Grade/Rank, click on the drop down menu and select the grade you want to view. Please note, only the grades for the cases you have in you inbox will be displayed. (see picture below)



**AIR FORCE  
PERSONNEL CENTER**

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[Home Page](#) | [Reports](#) | [Accounts](#) | [My Responsibilities](#) | [My Profile](#) | [Exit](#)

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**Inbox - Referred(Read)**

**Grid Options:**

Export to Excel

Wrap     No wrap

**Filter:**

**Problem Type:**  
-All-

**Grade/Rank:**  
-All-

**Category:**    **Date Opened:**  
-All-    -All-

**Legend:**

- <sup>1</sup>Last four digits of SSAN
- <sup>2</sup>Last two digits of SSAN
- <sup>3</sup>Manual Pay
- <sup>4</sup>Deploying/Deployed
- <sup>5</sup>Attachments
- <sup>6</sup>Number of Referrals to My Agency
- <sup>7</sup>Number of Referrals Total
- Requesting Status
- Case Updated

**Sort:**

To sort the grid, click-once on the title of the column you want to sort, click once again to sort descending, a third click will remove the sort from that column. You can sort multiple columns by clicking on the title of each column to sort.

4.2.1.3.1. **Referred.** A case referred to your agency by the inputting agency or case was entered and referred to at least one other agency before it arrived in your agency's in-box.

4.2.1.3.2. **Action Complete.** A case is transferred to the “Action Complete” in-box when any agency takes final action on resolving the case. A case entered by a base-level agency is automatically returned to the agency that referred it above base-level. EXAMPLE: A base-level MPF Customer Service enters a case and refers it to Base Promotions who refers it to the Base POC who refers it to AFPC Promotions; when AFPC promotions clicks on the “Action Complete” button the case returns to the Base POC, because that was the agency that referred it above base-level. If Base Promotions had referred it to AFPC Promotions, then it would return to the Base Promotions “Action Complete” in-box. If an HQ level agency enters a case (including ACCS cases), it returns to that agency’s “Action Complete” in-box when completed. EXCEPTION: If the case is referred to base-level for review/input, then on “Action Complete” the case will return to the base-level agency that last referred it above base-level for review or closure. NOTE: The case will return to the agency that referred the case above base-level, however, it may be directed to an MPF/FSO other than the originating MPF/FSO if the member has PCSd.

4.2.1.3.3. **Follow.** A case was put in follow-up status. “Follow” status was designed to remind the CMS user to go back to the case at a predefined date. EXAMPLE: While working a case the user needs to make multiple DJMS or MilPDS updates, request additional documentation, or coordinate the issue with another OPR. After completing the first update or coordination, he/she can place the case in “follow” status with a return or “Follow” date and a comment on what actions have been accomplished and what additional actions are required. This also advises all personnel monitoring the case of pending action. At the “Follow” date, the user can sort their “Follow” in-box by date and work cases in the order that makes sense.

4.2.1.4. The FOURTH section is “Enter/Update/Request Status on a Case” (see picture below). It’s where a new case can be entered, an existing case can be updated, or a status request can be made. Using Update or Request Status will also allow any user to attach a document to the case. **NOTE:** Clicking on the “Enter a New CMS Case” or the “Enter a New HR Case” button and then clicking on “View Definitions” link will provide a brief summary of each case type or “problem.” This may help you decide which case type of open to work the particular problem you trying to resolve.

## Enter/Update/Request Status on a Case

Member SSN:

Select CMS Case Type: [\(view definitions\)](#)

(Member's SSN above is required)


Select HR Case Type: [\(view definitions\)](#)

(Member's SSN above is required)

4.2.1.4.1. To enter a new case or to look for any existing case on a member, enter the member's SSN (with or without dashes). Use the pull-down menus to select from the type of cases in the list. Other – Issue Affects Pay, Other – Issue DOES NOT Affect Pay, and No Pay should only be selected if one of the other more specific case types does not match the problem the member is experiencing. After selecting the appropriate case type, click on "Enter New CMS Case"


## ENTER/UPDATE/REQUEST STATUS ON A CASE

Member SSN:

 Enter a New CMS Case

Select CMS Case Type: [\(view definitions\)](#)

(Member's SSN above is required)

 Enter a New HR Case

4.2.1.4.1.1. Any existing cases for that SSN of any type problem, open or closed, will be listed. Each case can be viewed to determine if it matches the current problem. If a case already in CMS exactly matches the same problem, use that case. Don't open a redundant new case. If this member has no other CMS cases, the case type you selected will appear.

CURRENT CASES FOR 111-11-1111 - LT COL SEVERAL MANY						
Case#	Case Type	Category	Opened	Ref./Closed	Status	Action
1465381	Debts	Problem	25-Aug-2008	10-Sep-2008	Action Completed/Base ANG Pay Office	Update

4.2.1.4.1.2. If a case that was used to resolve the same problem is closed, it may be reopened. However, if the case has been closed for more than 5 days, only the Base CMS POC can reopen it. Reopening the case retains the original opening date and properly represents the age of the case. **NOTE:** A complete explanation must be provided as to why the case is being reopened. Rationale is that before closing a case, a complete review should have been accomplished to ensure all actions were completed.

4.2.1.4.1.3. If a case using the same problem type is still open, you will get a pop up note that reads: "Warning! An open case of the same Problem Type for this Member already exists". You'll click the "OK" button and then in the "Action" column, the Update button. By doing that, the case remains assigned to the agency that is currently working it, but the new information/attachment is provided. **EXAMPLE:** If there is already a Leave case open, even if the new problem is with a different leave, include the new information so that all issues regarding leave can be resolved at one time.

4.2.1.4.1.4. If it is inappropriate to update an existing case of the same problem type with the new information, since there can only be one case per member of the same problem type open at the same time, you must use "Other – Issue Affects Pay" or "Other – Issue DOES NOT Affect Pay" or some other related problem type to open a new case. The reason behind this limitation is to allow AFPC or DFAS to resolve all the problems related to a particular problem type at the same time.

4.2.1.4.1.5. If the problem matches none of the existing cases, open a new case by clicking on "Create New Case" button below the listed cases.

4.2.1.4.2. Pre-population of the CMS case.

4.2.1.4.2.1. When entering a new case, it automatically pre-populates either with data from MiIPDS (if MiIPDS is available) or from the last existing case (if MiIPDS is not available). The user must review and correct the pre-populated information. If MiIPDS is not available and there is no previous case, the user will need to enter, at a minimum, the required data elements marked with a \* indicating mandatory fields. The case type will determine which fields are mandatory.

#### 4.2.1.4.3. Mandatory fields

Member's Data				
<p>Most data is pre-populated from MilPDS. Any of the data may be changed to reflect current information, except the SSAN. Last name, First Name, MI, and Grade are self explanatory. Include the Area Code if the phone number is commercial, and if an overseas DSN, include the prefix. If a work e-mail for the member is not available, if he/she has a home e-mail address where they would want updates sent, include that. As you can see, PAS is a required entry but unit name is not. If you want to include unit name for ease of reference, by all means include it. RPO ID applies only to reserve members.</p>				
<b>Member SSN</b>	<b>* Last Name</b>	<b>* First Name</b>	<b>MI</b>	<b>* Grade</b>
111-11-1111	1111111111 SEVERAL	MANY		Lt Col
<b>Phone (DSN Preferred)</b>		<b>* E-Mail (Work E-Mail Preferred)</b>		
4542225		help.fm@txelli.ang.af.mil		
<b>* PAS</b>	<b>Unit Name</b>	<b>RPO ID</b>		
L91CFH1V	147 RW			
<b>DAFSC</b>	<b>PAFSC</b>	<b>CAFSC</b>	<b>AFR-SEC-ID</b>	<b>ANG-TECH-ID</b>

4.2.1.4.3.1. **SSN** - Entered on previous screen. Once the case is Referred (saved) this cannot be changed. If a case is entered using the wrong SSN, the Base POC has the ability to delete that case so that the correct SSN can be entered for the new case and not create a duplicate case.

4.2.1.4.3.2. **Name**. Pre-populated if available. If not, enter last name, first name, and middle initial or correct what is pre-populated. Please make an entry explaining the correction you made in one of the comments sections.

4.2.1.4.3.3. **Grade**. Pre-populated if MilPDS is available. If not, use the pull-down list to select the correct grade. If the grade is incorrect (could be the reason that the case is being entered) make the correction and explain in the comments section.

4.2.1.4.3.4. **Member's Phone**. DSN is preferred. Enter or correct. Agents may use the phone number to contact the member for further information if needed.

4.2.1.4.3.5. **Member's e-mail address**. Enter or correct. If the member has no e-mail address consider using the member's first sergeant, commander, Commander's Support Staff organizational account, or your own e-mail address (in that order). Agents use the e-mail address to contact the member for additional information and to notify the member when the case is closed. This field is not required for students attending technical training for short periods of time if they have less than one year of service (but if one is available, enter it).

4.2.1.4.3.6. **Personnel Accounting Symbol (PAS) code**. Enter or correct. Makes it possible to provide unit with listings of members that have open cases and also allows verification of servicing MPF.

4.2.1.4.3.7. **Case Description.** *THIS IS ONE OF THE MOST IMPORTANT DATA FIELDS IN CMS*--it will make or break the ability to resolve the case quickly. Enter a comprehensive description of the problem. The more complete this is, the easier it will be to resolve the case. Cryptic entries are discouraged. Enter as much as possible of what you would say to the next agent working the case. Also, list any source documents that you will add to the case. *ALWAYS* attach supporting documentation. This allows everyone reviewing the case the opportunity to view the documents.

4.2.1.4.3.8. **Root Cause.** Select something other than Unknown, even if you are not sure. If you select "Other", enter a short description of what you believe caused the problem. This assists MAJCOMs and HQ level managers in correcting these root causes. The more accurate this is the better chance that future cases will be avoided.

4.2.1.4.3.9. **Category.** ANOTHER IMPORTANT DATA FIELD! Select either Query, Problem, or Process.

4.2.1.4.3.9.1. Query - The member or you have a question that can't be answered on the spot but it can be answered through referral to another agency.

4.2.1.4.3.9.2. Problem - The member's pay is directly affected by the condition.

4.2.1.4.3.9.3. Process - The error in the system is not currently causing a pay problem for the member, but CMS has been identified as the means to communicate the need to change a data element in one of the HR systems. Selection of the correct category allows managers at all levels to determine how many AF people currently have a "pay problem" meaning current pay is affected. If CMS is being used to advise AFPC or DFAS of a projected action, "Process" category should be used.

4.2.1.4.3.10. **Other data elements as determined by the Problem Type.** If the field is marked with a \*, meaning that it is a mandatory field, enter or correct the data. CMS will not allow you to refer a case that has missing mandatory data elements.

4.2.1.4.4. Other important fields.

4.2.1.4.4.1. **Manual Pay.** Mark this field if the member is being paid manually. This provides some priority treatment for the case.

4.2.1.4.4.2. **Deployed or deploying within 30 days.** Mark this field if it applies. This provides some priority treatment for the case. Please indicate the future deployment date if known but be cautious not to include any information that may make the case classified.

4.2.1.4.4.3. **Servicing MAJCOM** and **Servicing MPF** data fields.



4.2.1.4.4.3.1. When cases are entered at base-level these data fields are pre-populated from the user's account and cannot be changed. They will always equal the MPF ID for the base that is inputting the case. If you are not the servicing MPF or FSO but are entering the case for another MPF or FSO, refer it to the Base POC (or in unusual cases the appropriate HQ level agency) and ask them in the comments section to edit the case and change it to the correct MAJCOM & MPF. If the Base POC takes this action as recommended, the case will be immediately transferred to the Base POC "Referred" in-box at the appropriate base. Comments explaining why the case is being transferred are critical.

4.2.1.4.4.3.2. Cases entered at MAJOM level allow selection of Servicing MPF. Use pull-down menu to make that selection. If you are entering the case for another MAJCOM, use the procedure in "[Moving a case to another base](#)" (at paragraph 4.10.2.2.) and ask the HQ level agency to edit the case to correct the servicing MAJCOM and MPF.

4.2.1.4.4.3.3. Cases entered at HQ level (AFPC and DFAS) must select the correct servicing MAJCOM and MPF. These are pre-populated from the member's servicing MAJCOM and MPF in MiIPDS if available, but may be incorrect--check and change as necessary.

4.2.1.4.5. Referring the case to the first agency.

The screenshot shows a web form with a blue header labeled "ACTION". Below the header, there is a checkbox labeled "Refer to different MAJCOM/MPF". Underneath, there are two input fields: "MAJCOM:" with the value "AMC" and "MPF:" with the value "GRAND FORKS AFB ND (AMC)". To the right of these fields is a button labeled "Refer". Below the input fields is a dropdown menu labeled "Refer Case To:" with the selected value "DFAS AC TD 00-49".

4.2.1.4.5.1. Base-level OPRs and Base POCs that enter cases can refer them to other base-level agencies or to agencies above base-level. If you select a base-level agency, remember it automatically will go to that agency at your base. Selecting an agency above base-level will immediately assign it to that agency in their Referred in-box. Assigning it above base-level also identifies your agency as the one that the case will be returned to when action is complete. **IMPORTANT NOTE: When base level agencies refer cases above base level, you can not change the "MAJCOM" and "MPF" information. Just select the appropriate agency name and click on the "Refer" button.**

4.2.1.4.5.2. MAJCOM and HQ level agencies creating cases can refer them to base-level or above base-level. If a base-level agency is selected, it will go to the base indicated in the data item servicing MPF. When a case you created is ready for closure, it will return to your agency for closure in your Action Complete in-box. EXCEPTION: If the case is referred to base-level for review/input, then on "Action Complete" the case will return to the base-level agency that last referred the case above base-level.

#### 4.2.1.4.5.3. Result of a successful referral.

4.2.1.4.5.3.1. Click on the Refer button for a screen that provides the assigned case number, member's name and SSN, date and time case was entered, and problem type, indicating that the case was referred successfully. If you receive an error of any kind at this point, copy the text of the error, paste it into an e-mail and send it to [CMS\\_Management@randolph.af.mil](mailto:CMS_Management@randolph.af.mil) with a description of what you were doing at the time of the error. Include the name and version of the browser you are using. In all likelihood, the case was not saved properly and you should reenter it. If you are on the page that allows you to refer the case, double check the agency to ensure it is the one that you want to refer it to and click on the Refer button again. If you are no longer on the case referral page, use your browser's back arrow to return to that page and re-refer the case. If you receive the same error the second time, the CMS program is probably not working properly and you should exit the program and return at a later time to work CMS cases.

**CASE# 1512225 REVIEW SUCCESSFUL!**

Thank you for creating a case online for the CMS. Your case has been submitted and the review process has been initiated. If you would like to create another case or view the status of your case(s), please return to the [CMS home page](#).

**Note: Do not click on the Back button and click submit again. Doing this will create a new record again.**

<b>Case Number:</b>	<input type="text" value="1512225"/>
<b>Regarding:</b>	<input type="text" value="Allotment"/>
<b>Created Successfully on:</b>	<input type="text" value="06-Oct-2008 11:45:07 AM"/>
<b>For:</b>	<input type="text" value="SEVERAL MANY"/>
<b>SSAN:</b>	<input type="text" value="111111111"/>

4.2.1.4.5.3.2. Note the caution on the web page: **Note: Do not click on the Back button and click submit again. Doing this will create a new record again.** Use one of the links provided to either return to the home page (CMS Home Page) or exit CMS (Exit Application).

4.2.1.4.5.3.3. Attachments. On the same screen that tells you that the case was referred successfully, you have the opportunity to attach supporting documents to the case. Click on the link "Add Attachments for this Case" and follow these instructions:  
**To add an attachment to this CMS case:**

- Please click on the "Browse" button.
- Then you'll get a "Choose File" screen
- Navigate to the file ("Desk Top", "My Documents", etc) where you have the attachment on your PC.
- After you locate the attachment, double click on the attachment and the attachment will be added to this screen.
- You'll note the complete location of the attachment will display; however, only the attachment name will appear on the case file.
- Next, click on the "Attach File" button
- If you have more attachments, follow above procedures to add each attachment
- If you select an attachment by mistake, just click on the "Delete" button to remove the attachment
- When you have selected all your attachments for this case, click the "Finish" button and the files will be added to the case.

ATTACHED FILES			
File Name	File Size	Attachment Date	
ADSN.xls	167 KB	10/6/2008 11:53:59 AM	Delete
MPFM 07-86.doc	127 KB	10/6/2008 11:56:11 AM	Delete
SAF FM Report - 1 Oct 08 1420 hrs.doc	36 KB	10/6/2008 11:56:35 AM	Delete
WAR 29 Sep - 3 Oct 2008.doc	34 KB	10/6/2008 11:56:55 AM	Delete

Add Attachment:

The FIFTH section is "Case Lookup" (see picture below). It's designed to allow users at all levels to track cases and provide oversight. Users can lookup cases by the Case # or the member's SSAN.

**CASE LOOKUP**

**Find by Case#:**

---

**Find by SSN:**

4.2.1.4.6. The "Advanced Find" feature allows the user to create a query based on a limited number of criteria and to sort that query using up to three criteria. Also, the "Advanced Find" feature is used to find Archived cases. If you want to review all cases pertaining to an individual to include the archived cases, suggest you always check the "Archive Cases" box. Also, on any open case, in the "Other CMS Cases" block you'll see a hot link to archived case(s).

SEARCH A CASE BY

**Last Name:** 
**Results Ordered By:** Case #

**Filter Cases By Status:** -All-
**Then By:** (None)

**Filter Cases By Category:** -All-
**Then By:** (None)

**Cases Created By My Agency:** 
**Manual Pay Cases Only:** 
**Deployed Members:** 
**Include Archive Cases:**

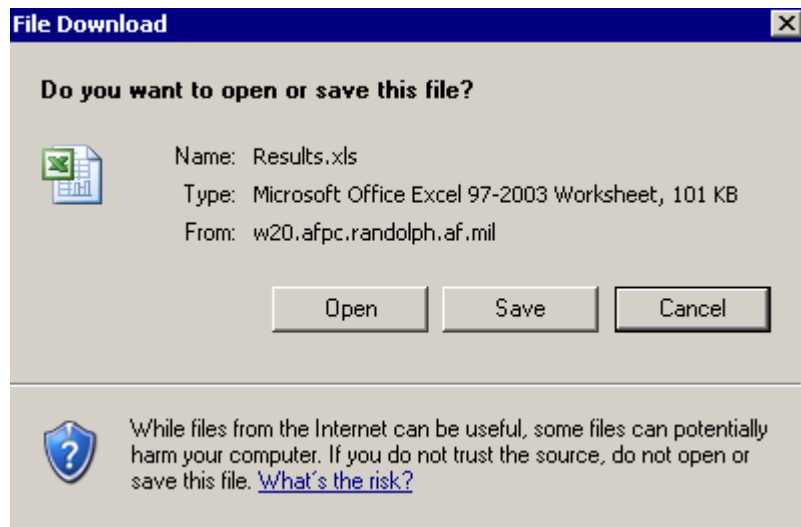
**Filter Cases By Case Type:** -All-

**Filter Cases By Root Cause:** -All-

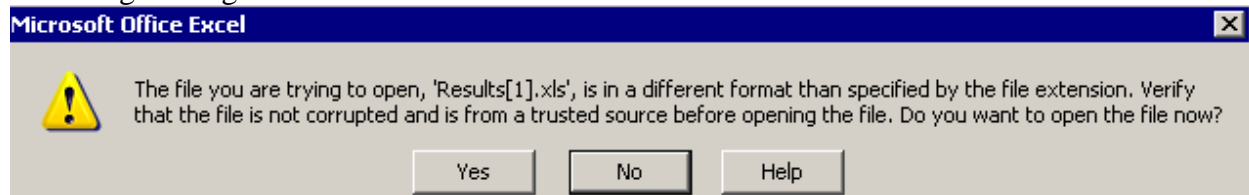
Develop the query by using the pull-down menus to select the criteria you want; you may use one or all. Use the filter “Cases Created By My Agency” to limit the query to only those actually input by your agency. EXAMPLE: If you are logged into CMS as Base AD Reenlistments, you will see all cases that were input by anyone at your base using that account. If you are the Base POC and no one has input cases using the Base POC account, you will see zero cases. If you are at MAJCOM level, you will see a filter allowing you to select an individual base. If you are at HQ level, you will see both Base and MAJCOM filters, allowing selection of cases from just a single MAJCOM and base.

4.2.1.4.7. Use the “Results Ordered By” pull-down menu to sort up to three levels. EXAMPLE: You can sort the report by Problem Type, then by Status, then by Date Opened.

4.2.1.4.8. Click on the Search button to produce the report. Each page of the report defaults to 20 cases, though the last page may contain fewer. NOTE: You can now change the number of cases displayed on each page to 10, 20, 50, 100 or all. Just click on the drop down menu for “Records per Page” and select your choice. You may view each individual case by clicking on the View link at the right of the case information. **NEW FEATURE ADDED TO REPORTS: “EXPORT” BUTTON.** If you want to export this report to an excel spreadsheet, just click on the “Export to Excel” button. You’ll get following message:



You can now save the report or open the report in excel. When you click on “Open” you’ll get following message:



Always click on the “Yes” button. This is a system generated message and cannot be disabled. After clicking on the “Yes” button, excel will open and the report will be exported to excel automatically.

The SIXTH section is "Reports" (see picture below). See complete details at [paragraph 4.26](#). The reports section contains a number of pre-formatted reports. Most are limited to the scope of the agency requesting the report, i.e. base-level sees all the information from their base, MAJCOM sees all of their MAJCOM, and HQ level sees data from the entire AF. Most CMS users only use a small number of these reports. Therefore, the "My Favorite Reports" section was developed to allow individual CMS users to move their "Favorite" reports from the "CMS Reports" page to the CMS Home Page. To add reports to the "My Favorite Reports" section, click on the "Reports" link. Then under the "Action" column, find the reports you use often and then click on the "Add to Favorites" link. This will add the report to your "My Favorite Reports" section. After adding the report to your "Favorites", the "Add to Favorites" link will change to "Remove from Favorites". So it's easy to add and delete reports to the "Favorites" section of the CMS Home Page. CMS Reports... (see picture below). This section contains all reports available to your agency. You can sort by report ID or Report Name and add to favorites.

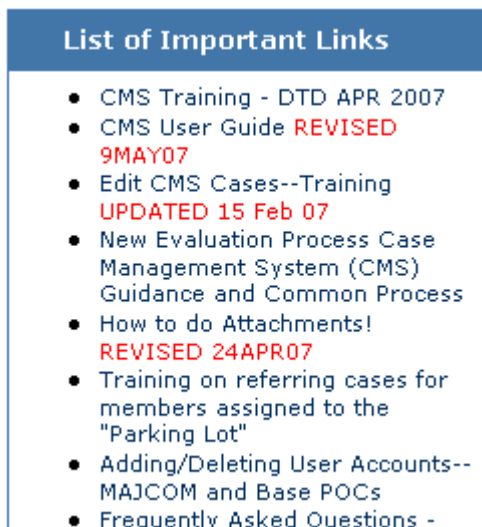
CMS Reports		
ID	Report Name	Action
1	<a href="#">Cases Older than 120 days (Problem Only)</a>	Add to Favorites
6	All Cases over 30 Days	Add to Favorites
7	All cases Not Closed or Action Complete	Add to Favorites
10	Count-people with Problems (By Base)	Add to Favorites
16	ALL OPEN CASES ASSIGNED TO A BASE LEVEL AGENCY (Pay & MilPDS Issues)	Add to Favorites
17	Stagnant Cases -- > 30 Days at Base-Level Agency	Add to Favorites
18	Stagnant Cases - > 20 days in agency above Base	Add to Favorites
31	Stagnant Cases -- > 5 Days at Base Agency- "Action Complete"	Remove from Favorites
33	Action Complete - All Cases	Add to Favorites
34	Stagnant Cases -- > 5 Days at Base Agency- "Action Not Complete"	Remove from Favorites

When you add reports to the "My Favorite Reports" section of the CMS Home Page, you can review these reports from the CMS Home Page without navigating to the "Reports" section.

My Favorite Reports

- Base AD CSS Listing
- All open cases-sorted by member PAS - 2
- Stagnant Cases -- > 5 Days at Base Agency- "Action Complete"
- Stagnant Cases -- > 5 Days at Base Agency- "Action Not Complete"

4.2.1.5. The SEVENTH section is "List of Important Links" which includes training; guidelines for the use of CMS; some "how to" advice and copies of recent AF PersPay Council briefing slides.

- 
- CMS Training - DTD APR 2007
  - CMS User Guide **REVISED 9MAY07**
  - Edit CMS Cases--Training **UPDATED 15 Feb 07**
  - New Evaluation Process Case Management System (CMS) Guidance and Common Process
  - How to do Attachments! **REVISED 24APR07**
  - Training on referring cases for members assigned to the "Parking Lot"
  - Adding/Deleting User Accounts-- MAJCOM and Base POCs
  - Frequently Asked Questions -

### **4.3. User Account Maintenance.**

4.3.1. User account maintenance is distributed to the lowest level practical. Base POCs maintain all user accounts at that level (except the Base POC account). MAJCOM POCs control Base POC accounts and MAJCOM level accounts (except the MAJCOM POC account). DFAS and AFPC control accounts within their organizations. AFPC CMS Management maintains/controls MAJCOM POC and HQ level POC accounts.

4.3.1.1. Bases normally assign at least four individuals to act as Base POC--a primary and alternate in the MPF and primary and alternate in the FSO. These accounts are given Accounts Maintenance capability by the MAJCOM POC. **NOTE:** Accounts with "Accounts Maintenance" capability will have a check mark in the "POC" block on the "My Responsibilities" screen – please note, accounts other than the Base POC can have "Accounts" authority (see below picture). The "Superuser" account is limited to CMS Functional Manager and a limited number of trusted agents. This account allows the user to emulate any CMS agency; therefore, this user can work any case assigned to any CMS agency AF-wide.



**AIR FORCE  
PERSONNEL CENTER**

**GRAND FORKS AFB ND (AMC)**  
Base AD FSO  
Select Responsibility

[Home Page](#) | [Reports](#) | [My Responsibilities](#) | [My Profile](#) | [Exit](#)

---

SELECT RESPONSIBILITY						
Agency Name	SuperUser	POC	Role	MPF	Cases	
Base AD Casualty Office	<input type="checkbox"/>	<input type="checkbox"/>	Base OPR	GOODFELLOW AFB TX (AETC)	0	Select...
Base AD Career Development Section	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	GOODFELLOW AFB TX (AETC)	3	Select...
Base AD AFOSI/Reg 7 Commander	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	YOKOTA AB JAPAN (PACAF)	0	Select...
<b>Base AD FSO</b>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Base OPR</b>	<b>GRAND FORKS AFB ND (AMC)</b>	<b>10</b>	Select...
Base AD CSS Operations Spt Sq	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	GRAND FORKS AFB ND (AMC)	1	Select...
Base AD CSS Medical Support Sq	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Base OPR	SCOTT AFB IL (AMC)	0	Select...
MAJCOM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MAJCOM OPR	HILL AFB UT (AFMC)	0	Select...
CMS Functional Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AFPC/DFAS	RANDOLPH AFB TX (AFPC)	0	Select...
ARPC Enlisted Promotions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AFPC/DFAS	ARPC DENVER	45	Select...
DFAS RC Indianapolis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AFPC/DFAS	DFAS INDIANAPOLIS IN (DFAS)	62	Select...

[Home Page](#) | [Exit Application](#)

4.3.1.2. Selecting the responsibility with a check mark in the "POC" block will display the "Accounts" link on the CMS Home Page. Clicking on "Accounts" displays a list of all accounts at the base except those that have Accounts Maintenance capability (those show up on the MAJCOM POC list). This listing can be sorted by any column by clicking on the column name, making it easier to manage the accounts. POCs can edit accounts by clicking on the edit next to the user's name and making changes as appropriate. To delete accounts that are obsolete, simply click on the "Delete" button.



Users Accounts									
Export to Excel		User's SSAN to Create: <input type="text"/>		Add					
Page: 1 of 0		Records per page: 20							
	SSAN	Name	Rank	Title	E-Mail Address	Agency	MPF	Last Access	DEROS/DOS/RNLTD
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	1111:1111	Abott, Test	TSgt	NC0IC CSS	Test.Abott@Grandforks.af.mil	Base AD CSS Operations Spt Sq	GRAND FORKS AFB ND (AMC)		30-Sep-2009
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	1111:1112	Account, Test	Col	Commander	Test.Account@Grandforks.af.mil	Base AD CSS Operations Spt Sq	GRAND FORKS AFB ND (AMC)		02-Aug-2009
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	123456789	Acron, Nutty B.	SMSgt	Supt, 334th OSS	Nutty.Acron@Grandforks.af.mil	Base AD CSS Operations Spt Sq	GRAND FORKS AFB ND (AMC)		11-Nov-2011

4.3.1.2.1. New Account....see below picture. To establish a new account for the user, enter the user's SSN in the "User's SSAN to Create" block and click on "Add". Use the Agency drop down menu to select the appropriate CMS agency to grant this person. Then complete the identification data, name (Last, First MI), title, grade, e-mail, phone and click on Save. **NOTE: FOR NEW CMS USERS: The CMS button will not be immediately visible to the member. AFPC uploads new CMS accounts to AFPC Secure twice daily (about 0600 hours and 1500 hours CST).** The "Email Notification" block should be checked when you want the CMS user to receive an alert message to their Outlook when a new case is referred to their agency for action.

Account Profile	
<b>New Account</b> <span style="float: right;">* = Required</span>	
* MPF:	<input type="text" value="GRAND FORKS AFB ND (AMC)"/>
* Agency:	<input type="text" value="Base AD CSS Operations Spt Sq"/>
SSAN:	<input type="text" value="122334444"/>
* Name (Last First MI):	<input type="text"/>
* Title:	<input type="text"/>
* Grade/Rank:	<input type="text"/>
* Email:	<input type="text"/>
* Phone:	<input type="text"/>
DEROS/DOS/RNLTD:	<input type="text"/> <input type="button" value="Calendar"/>
Email Notification:	<input type="checkbox"/> <small>Notify me when a case is referred to my agency. Make sure your email address above is correct.</small>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4.3.1.2.2. Additional Account. To establish an additional account for the user, use the create account process--don't edit the existing account. The screen will be pre-populated with the information from the member's other account(s). Change the agency and click on Save.

4.3.1.3. MAJCOM POCs use the procedures above, but in addition must determine if the base-level account should have Case Management capability. To add Accounts Maintenance capability to an account, check the block next to "Case Management". Also, you can grant the Base POC the capability to "delete" and "reopen" cases. To grant this authority, you check to block next the "Delete/Reopen" box, and then save the record.

**Account Profile**

**New Account** \* = Required

\* MPF: HILL AFB UT (AFMC)

\* Agency: MAJCOM

SSAN: 122334444

\* Name (Last First MI):

\* Title:

\* Grade/Rank:

\* Email:

\* Phone:

DEROS/DOS/RNLTD:

Email Notification:  *Notify me when a case is referred to my agency. Make sure your email address above is correct.*

Delete/Reopen Cases:  *By checking this box, you are giving the user the capability of DELETE/REOPEN CASES.*

Case Management:  *By checking this box, you are giving the user the capability of CREATE/DELETE USERS in his/her MPF or FSO.*

4.3.1.4. DFAS and AFPC OPRs with the Accounts Maintenance capability can use the Accounts Maintenance function to add, edit and delete accounts within their area of responsibility using the processes in the sections above.

4.3.1.5. CMS Management must use the separate CMS management program to grant Accounts Maintenance capabilities at all levels and must also use it to add, edit, or delete accounts for any agency other than additional accounts for CMS management.

#### 4.4. Entering New Cases.

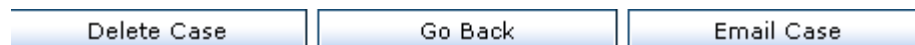
4.4.1. CMS users may enter new cases into CMS either as a result of contact from the member with a problem or upon recognition that a problem exists that cannot be resolved on the spot or through update of one of the HR systems. See [Enter/Update/Request Status on a Case](#) at paragraph 4.2.1.4 for a full description.

## 4.5. Deleting Cases.

4.5.1. MAJCOM POCs may grant the authority to delete cases to Base POCs with CMS user accounts capability. This capability is usually reserved for Base POCs and MAJCOM POCs and must be used judiciously. The only approved reasons for deleting a case is (1) when a new case was initiated and the wrong SSN was used for the member or (2) the case is a duplicate. Since all other information except SSN can be edited, a case should be corrected rather than deleted. In the event an incorrect SSN is used to create a case, delete that case and enter a new one with the correct SSN. EXCEPTION: If a case is entered in error, such as a total misunderstanding by the clerk entering the case as to the real circumstances, that case may be deleted.

4.5.2. Cases should NOT be deleted for any of the following reasons: (1) The case is resolved and closed so it is no longer needed; (2) The case is very old and needs to be reestablished so someone will pay attention to it; (3) The case has been in someone's in-box for too long and it needs to start over; (4) The case has been in action complete too long and has caused the stats to be misleading; or (5) The case has some erroneous information in it or was referred to the wrong agency. If needed, edit and correct the information or contact the agency where the case was erroneously referred and have them refer it to the proper agency.

4.5.3. How to delete a case: ***NOTE: Only "open" cases can be deleted. If a case is closed, you must reopen the case in order to "delete" the case.*** Once a decision is made that a case should be deleted, the POC with "delete" capability must log into CMS using the agency where the case is currently assigned. Then, you must click on the "Advanced Find" link in the "Case Lookup" section. Then enter the "case number" in the "Enter Case#, SSAN or LastName" block" and click on the "Search" button. Then click on the case number in the Case# block. Then scroll to the bottom of the case file and you'll find the "Delete Case" button.



4.5.4. Three keys to deleting a case: (a) you must be authorized, (b) you must log into the agency where case is currently assigned and (c) you must bring up the case using the case number by clicking on the "Advanced Find" link in the "Case Lookup" section. Then enter the "case number" in the "Enter Case#, SSAN or LastName" block" and click on the "Search" button. Then click on the case number in the Case# block. Then scroll to the bottom of the case file and you'll find the "Delete in the "Case Lookup" block – the SSAN will not work.

#### **4.6. Use of Base-Level Management Account.**

4.6.1. The account named "Base Management" was established to give base-level manager's access to CMS without having them involved in case routing and processing. FSOs, MPF/CCs, MSS/CCs, Superintendents, etc. may wish to have access to CMS and this account gives them all information necessary for their oversight role. If they desire to actually be involved in case processing, assign them to one of the other accounts, but for oversight/review purposes the base management account is perfect.

#### **4.7. Referring (Reviewing) Cases.**

4.7.1. The referral process is the heart of CMS. Case resolution is what it's all about.

4.7.1.1. When a case is entered, it must be referred to another agency. If the problem can be resolved on the spot, a CMS case is not needed. Select the most appropriate office that can start the case resolution process. A new case will arrive at the referred agency in their "Referred" in-box.

4.7.1.2. Subsequent referrals should be made to agencies that have a role in resolving the problem. Referrals must be done in the order that allows the steps for problem resolution to be taken in the proper order. Sufficient comments should be added in each case so the next agency will know (1) what you have done to resolve the problem and (2) what you believe they need to do to resolve the problem. For unusual cases you should also include where you believe they should send it next if there is another agency that needs to be involved.

4.7.1.3. Referrals are done only by opening a case through an in-box. Your agency must be assigned the case to be able to send it on to another office. If the case is not assigned to your agency but you have information to add to the case, use the update process as described in [Updating Cases](#) at paragraph 4.8.

4.7.1.3.1. The various in-boxes were designed to assist you in prioritizing your work. Cases in the Overdue in-box require more immediate attention than those in other in-boxes. Cases in the Action Complete in-box also require action in less than five days to meet established standards. Cases in the Follow in-box can be worked by their follow-up date, allowing agents to finalize work already in progress based on the date established when the case was placed in that status. .

4.7.1.3.2. Click on the in-box that you want to open to produce a list of cases from that in-box. Sort the list by any of the columns by clicking on the column header. Give particular attention to cases that are marked Manual Pay (Legend 3M) or Deployed (Legend 4D) (you can sort by those columns as well, bringing these important cases to the top).

4.7.1.3.3. Determine which case you wish to work and click on the Review link.

4.7.1.3.4. With the case open, review the pertinent information, take whatever corrective action is necessary, make appropriate comments, then do one of the following with the case: [Action Complete](#) (see paragraph 4.16.), [Refer](#) (see paragraph 4.7.), or [Follow](#) (see paragraph 4.15.). If any information in the identification portion of the case is incorrect, use the [Edit](#) function (see paragraph 4.10.) to make the correction. The Edit function is where you can realign the servicing MPF if necessary (usually caused by the member going PCS while the case is open).

4.7.1.3.5. The “Other CMS Cases” section of the case provides a list of all cases in CMS for that member. You can view any of those cases by clicking on the view link in the action column.

Other CMS cases						
Case#	Problem Type	Category	Opened	Ref./Closed	Status	Action
962468	Extension	Process	21-Jul-2007	10-Aug-2007	Closed	<a href="#">View</a>
1460704	Separation (F503 Problem)	Process	20-Aug-2008	26-Aug-2008	Closed	<a href="#">View</a>
150642C	AF Fm 911 Active	Process	18-Sep-2008	18-Sep-2008	Closed	<a href="#">View</a>
1507967	Collections	Problem	18-Sep-2008	19-Sep-2008	Closed	<a href="#">View</a>

4.7.1.3.6. To refer the case, you’ll use the “Action” section. The MAJCOM and Base agency default to Servicing MAJCOM/MPF. This data MUST NOT be changed when referring the case above base level or between agencies above base level. This data will only be changed when the case must be referred to a different MAJCOM and base to work. When this is necessary, click on the “Refer to different MAJCOM/MPF” and then use the pull-down menus. The pull-down menu for “Refer Case To” will only show agencies where there are agents assigned to work cases. If you need to refer the case to an agency that does not appear on the pull-down menu, contact the agency and have them assign an agent in CMS.

**Action**

Refer to different MAJCOM/MPF

MAJCOM:

MPF:

Refer Case To:

Follow up on this case:

**Edit Member's Data & Case Info (any input on this form will be lost):**

Click when case is ready to close:

## 4.8. Updating Cases.

4.8.1. Agencies that are not currently assigned the case (which could be any agency, including the agency that input the case originally) cannot refer, place in Follow status, Action Complete or close a case, but they can add comments and attachments to the case using the update process.

4.8.1.1. To update a case, enter the member's SSN in the Update/Request Status section. Then click on "Update/Request Status" button

Enter/Update/Request Status on a Case

**Member SSN:**

---

---

4.8.1.2. If there is/are existing case/cases, the list will be shown.

Current Cases for 111-11-1111 - Lt Col SEVERAL MANY						
Case#	Case Type	Category	Opened	Ref./Closed	Status	Action
1512225	Allotment	Problem	06-Oct-2008	06-Oct-2008	Referred to DFAS AC TD 00-49	<b>Update or Request Status</b>
1465381	Debts	Problem	25-Aug-2008	10-Sep-2008	Action Completed/Base ANG Pay Office	<b>Update</b>
1512226	Assignment Incentive Pay (AIP) - 24thSTS	Process	06-Oct-2008	06-Oct-2008	Referred to DFAS AC Korea AIP/DFAS AC AIP/WMD	<b>Update or Request Status</b>

4.8.1.3. Select the case you want to update and click on the Update link. With the case open, scroll to the bottom of the case, enter any comments that you may desire (including copying and pasting comments from e-mails, etc.) and click on the "Update" button. You will notice that there is a [Request Status](#) (see paragraph 4.9.) button, but that's discussed in the next paragraph. When you click on "Update", you will be offered the opportunity to add attachments to the case. Use instructions for [attaching documents to cases](#) paragraph 4.11.

Request Status
Update
Cancel

4.8.2. This process adds comments but does not highlight that fact to the assigned agency. Using [Request Status](#) (see paragraph 4.9.) highlights that capability, but it should be used only when urgency in handling the case is necessary, not just because comments or attachments have been added.

4.8.3. Another purpose of the Update process is to request the agency assigned to the case to edit the identification data in the case, most often because the member is now serviced by another MPF or FSO. If you do request such a service be sure to include the data that you want to change, the new data it should be changed to, and a brief explanation of why the change should be made. You may want to use the Request Status process to request an edit when there is some urgency to making the change.

#### 4.9. Requesting Status on Cases.

4.9.1. This process should be used only when there are circumstances warranting disrupting the normal flow of the case. For example, requesting status simply because a case has been at an agency for longer than the normal suspense time would be appropriate only if most cases are worked within the established suspense. It might be appropriate to use if there is senior interest in the specific case. Overuse of this function will negate its effectiveness.

4.9.1.1. To "Request Status" of a case, enter the member's SSN in the Update/Request Status section. Then click on "Update/Request Status" button

Enter/Update/Request Status on a Case

**Member SSN:**

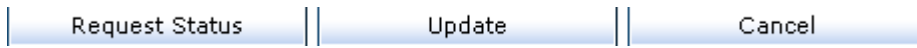
---

---

4.9.2. A list of existing cases will be presented--select the case you desire to "Request Status" on by clicking on the "Update or Request Status" link in the "Action" column.

Current Cases for 111-11-1111 - Lt Col SEVERAL MANY						
Case#	Case Type	Category	Opened	Ref./Closed	Status	Action
1512225	Allotment	Problem	06-Oct-2008	06-Oct-2008	Referred to DFAS AC TD 00-49	<b>Update or Request Status</b>
1465381	Debts	Problem	25-Aug-2008	10-Sep-2008	Action Completed/Base ANG Pay Office	<b>Update</b>
1512226	Assignment Incentive Pay (AIP) - 24thSTS	Process	06-Oct-2008	06-Oct-2008	Referred to DFAS AC Korea AIP/DFAS AC AIP/WMD	<b>Update or Request Status</b>

4.9.2.1. With the case open, scroll to the bottom of the case, enter any comments that you may desire (including copying and pasting comments from e-mails, etc.) and click on the Save button. You will notice that there is an [Update](#) button (see paragraph 4.9.) button, but that was discussed in the above paragraph. When you click on “Request Status” button to save your comments, you will be offered the opportunity to add attachments to the case. Use instructions for [attaching documents to cases](#) paragraph 4.11.



4.9.3. Another purpose of the Request Status Process is to request the agency that is assigned the case to edit the identification data in the case, most often because the member is now serviced by another MPF/FSO. If you do request such a service be sure to include the data that you want to change, the new data it should be changed to, and a brief explanation of why the change should be made. You can also use the Update process to do this when there is no urgency attached to changing the data.

#### 4.10. Editing Cases.

4.10.1. The case must be assigned to your agency for you to edit it. Sometimes you will be asked to edit a case by another agency through the Update or Request Status process. It is critical that you perform the edit if the servicing MAJCOM or MPF needs to be changed. This ensures that the case will return to the correct base for additional processing and final closing.

4.10.2. To edit a case, open the case through the appropriate in-box (opening it though the Enter/Update a Case or Search a Case by section of the home page will not allow you to edit it). Scroll to the bottom and click on the Edit button.

Action

Refer to different MAJCOM/MPF  
**MAJCOM:**    
**MPF:**   
**Refer Case To:**    
**Follow up on this case:**    
**Edit Member's Data & Case Info (any input on this form will be lost):**   
**Click to close this case:**



4.10.2.1. You can change everything but the SSN in the Identification Data - simply click on the data item and make the change, ensuring that you explain what you did in the Action/Comments block, then click on Save.

Member's Data					
<b>Member SSN</b>	<b>* Last Name</b>	<b>* First Name</b>	<b>MI</b>	<b>* Grade</b>	
111-11-1111	111111111	SEVERAL	MANY		Lt Col
<b>Phone (DSN Preferred)</b>			<b>* E-Mail (Work E-Mail Preferred)</b>		
4542225			help.fm@txelli.ang.af.mil		
<b>* PAS</b>		<b>Unit Name</b>		<b>RPO ID</b>	
L91CFHIV		147 RW			
<b>DAFSC</b>	<b>PAFSC</b>	<b>CAFSC</b>	<b>AFR-SEC-ID</b>	<b>ANG-TECH-ID</b>	<b>EAD</b>
Case Info					
<b>Case Number</b>			<b>Current Status</b>		
<b>1465381</b>			Referred to AFPC Line Officer Accessions (DPSIP)		
<b>ADSN:</b> <input type="text"/>	<b>FID:</b> <input type="text"/>	<b>ACT-IND:</b> <input type="text"/>	<b>ERR-CD:</b> <input type="text"/>	<b>CATG:</b> <input type="text"/>	<b>SVC-ADSN:</b> <input type="text"/>
<b>Root Cause of the Problem:</b>			<b>Explain: (Use only with "OTHER" root cause)</b>		
No MilPDS/DJMS Interface					
<b>Category:</b> <input type="text" value="Problem"/>	<b>Manual Pay:</b> <input type="checkbox"/>		<b>Deployed or Deploying within 30 days:</b> <input type="checkbox"/>		
<b>Servicing MAJCOM:</b> <input type="text" value="GUARD"/>	<b>Referred MAJCOM:</b> <input type="text" value="GUARD"/>				
<b>Servicing MPF:</b> <input type="text" value="0147 MSQ ELLINGTON TX"/>	<b>Referred MPF:</b> <input type="text" value="0147 MSQ ELLINGTON TX"/>				
<b>Case Type:</b> <input type="text" value="Debts"/>	<b>Refer Case to:</b> <input type="text" value="AFPC Line Officer Accessions (DPSIP)"/>				

4.10.2.2. Moving a case to another base. Select the correct MAJCOM and MPF and/or FSO, and Agency where you want to move the case. Explain why the case must be realigned in the Action/Comments section and click on the Save button. When this edit is performed on a case that is assigned above base-level, the case will return to the same agency that originally referred it above base-level, but at the new base when Action Complete status is accomplished. When this edit is performed on a case that is assigned to a base-level agency, it is immediately assigned to the selected agency at the new base, so be sure the comments section explains what the new base should do with the case. Comments must be comprehensive so that everyone understands what is needed for resolving the case.

4.10.2.3. Changing erroneous case types: Use the pull-down menu to select the appropriate case type. That will cause MilPDS to re-populate data if the new case type requires additional information. Be sure to review that data for accuracy and make changes as necessary, explaining those changes in the comments box. If the new case type has additional mandatory data, you must enter that as well. If the new case type does not require all of the data that the original case type required, that data will be lost with the change in problem type.

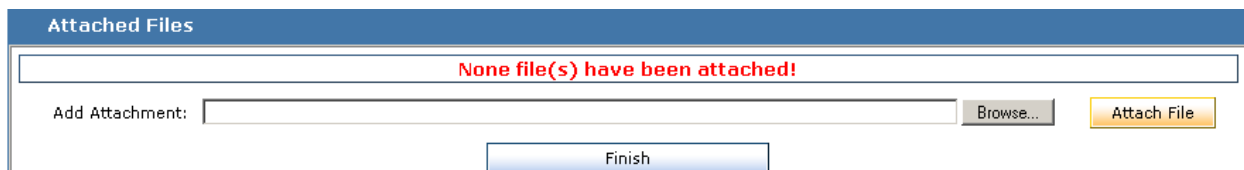
## 4.11. Attaching Documents to Cases.

4.11.1. Documents can be attached to the case through the “Enter/Update/Request Status” process. In each case, when you click on Refer, Request Status, Update or Follow , a screen announces successful completion of the process and offers the opportunity to add attachments.

Click on the link “Add Attachments for this Case”:

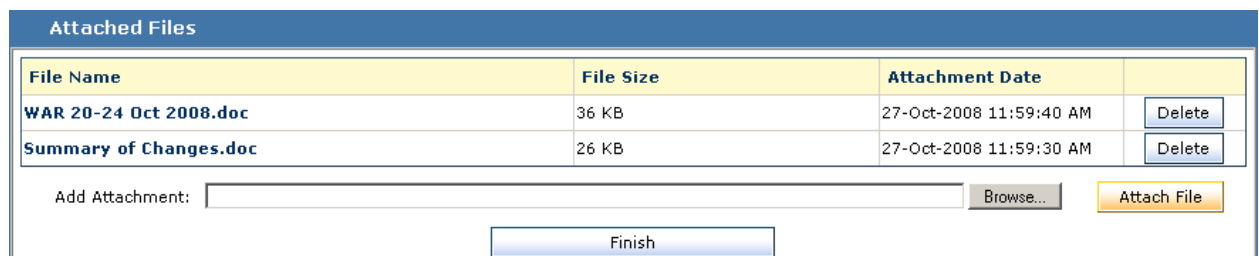
[Add Attachments for this Case....](#)

To add an attachment to this CMS case: (you'll get this screen)



The screenshot shows a window titled "Attached Files" with a blue header. Below the header, a red message states "None file(s) have been attached!". Underneath, there is a text input field labeled "Add Attachment:" followed by a "Browse..." button and an "Attach File" button. At the bottom center, there is a "Finish" button.

- Please click on the “Browse” button.
- Then you’ll get a “Choose File” screen
- Navigate to the file (“Desk Top”, “My Documents”, etc) where you have the attachment on your PC.
- After you locate the attachment, click on the “Attach File” button. This will display the attachment you are adding to the case.
- Repeat this process “Browse”; select the document and “Attach File” for each attachment you are adding.
- When you have selected and attached all your files, click on the “Finish” button to attach the files to the CMS case. (see below picture)



The screenshot shows a window titled "Attached Files" with a blue header. Below the header, there is a table with the following data:

File Name	File Size	Attachment Date	
WAR 20-24 Oct 2008.doc	36 KB	27-Oct-2008 11:59:40 AM	Delete
Summary of Changes.doc	26 KB	27-Oct-2008 11:59:30 AM	Delete

Below the table, there is a text input field labeled "Add Attachment:" followed by a "Browse..." button and an "Attach File" button. At the bottom center, there is a "Finish" button.

Finally, we'll display a screen showing you how many attachments and the attachment names. (See below picture) If no attachments are added to the case, it'll reflect (0)

cases added.

Case# 1465381 Review Successful!

Thank you for reviewing this case. Your comments have been stored with the case. If you would like to create/review another case, please return to the [CMS home page](#).

**Note: Do not click on the Back button and click submit again.  
Doing this will create a new record again.**

[Continue Reviewing Cases](#)

**Case 1465381: You Successful Added Attachment(s). (2) Attachment(s) added**  
WAR 20-24 Oct 2008.doc  
Summary of Changes.doc

Remember, you must "Browse" to the file, select the file to add and click on "Attach File". Then after all attachments are selected, click on the "Finish" button.

#### **4.12. Member's Access to Case Status.**

4.12.1. Members can check the status of their case(s) in CMS through the virtual MPF (vMPF) website. If he/she already has an account, they simply log onto vMPF. If not, he/she can apply on-line through the vMPF link on the AFPC Homepage.

4.12.2. Determining case status: In vMPF the member must click Help, then on the Case Management link, and then select the case. Status includes dates that the case moved from one agency to another and other basic identification data.

#### **4.13. Reviewing Cases.**

4.13.1. Through the In-Box: See [Referring \(Reviewing\) Cases](#) at paragraph 4.7. for instructions.

4.13.2. Through the Update Process: Used primarily by offices that do not have the case assigned to their agency--allows them to add an update to the case. See [Updating Cases](#) at paragraph 4.8. for instructions.

4.13.3. Through the Search a Case By process: Allows anyone that has access to the case to view the case but not provide updates or take action. Cases can be searched for by SSAN, Last Name, Case#, or a variety of other selection criteria. See [Search a Case by](#) at paragraph 4.2.1.5.

4.13.4. Through [Reports](#) (see paragraph 4.2.1.6.): Many standard reports provide lists of cases that meet the report criteria and offer the ability to view the cases.

## 4.14. E-mailing Cases.

4.14.1. At times, assistance is needed to resolve a problem from an office that is not a routine user of CMS. The e-mail process affords a way to send the case to that office to request assistance. It provides a pre-formatted e-mail with the pertinent information from the case.

**Email to Send**

Send Don't Send

**Send TO:** Use semicolons (;) to separate email address.

250 Characters Remaining

**CC:**

250 Characters Remaining

**Subject:**  
CMS Case# 1506928

**Message:**

The following Personnel/Pay case has been received by this agency "Base AD FSO" and is being worked. To complete our actions we need additional information/assistance from you. Please provide the information requested below by e-mail to this address Robert.Brinson2.ctr@Randolph.af.mil. After you click on Reply, be sure to paste this e-mail address Robert.Brinson2.ctr@Randolph.af.mil replacing AFPC/AutoEmail [afpc.autoemail@afpc.af.mil] which is automatically provided.

[REPLACE THIS COMMENT WITHIN THE PARENTHESES WITH THE SPECIFIC REQUEST/QUESTION THAT YOU HAVE OF THE PERSON YOU ARE E-MAILING THIS TO]

Information from the case that will assist you in your reply:

-----  
Cc.c# : 1506C28  
Date Opened: Sep 18 2008 12:00AM  
Date Closed: Jan 1 2000 12:00AM  
Member's Name: 1st Lt CASE, TEST E.

4.14.2. The e-mail function can only be accessed by the agency that is assigned the case. Scroll to the bottom of the case, click on the e-mail button and an e-mail screen will be produced. You can send the case to up to two e-mail addresses at a time, one in the 'To' block and one in the 'CC' block. You may modify the pre-formatted text as necessary and click on send.

4.14.3. When the office replies, you can use the information they provide to further process the case. The text of their reply may easily be entered into the case through the [Update](#) process (see paragraph 4.8.).

## 4.15. Follow Process.

4.15.1. This process was designed to allow an agency to suspend their return to a case they are working but cannot yet resolve. EXAMPLE: If there are several steps required to correct a problem you may take one of those steps, then place the case in follow status with the appropriate follow-up date to remind you to take the next step in the process. Using the follow process requires comments to be entered that will let everyone interested in the case know what is happening.

The screenshot shows a web form titled "Action" with a blue header. It contains the following fields and options:

- Refer to different MAJCOM/MPF
- MAJCOM: AMC
- MPF: MCGUIRE AFB NJ (AMC)
- Refer Case To: -Select-
- Follow up on this case: 21-Oct-2008
- Edit Member's Data & Case Info (any input on this form will be lost):
- E-Mail this case (any input on this form will be lost):
- Click to close this case:

On the right side, there are four buttons: Refer, Follow, Edit, and Email. A Close button is located at the bottom right of the form area.

4.15.2. The Follow process is only available to the agency that is assigned the case. Open the case through the in-box, scroll down, enter comments explaining what you are doing, select the date that you want to return to the case (seven days is the default), and click on Follow.

4.15.3. The case will be moved to your Follow in-box. When you open that box, you can sort the cases by the follow date so that you know which ones to work first.

## 4.16. Action Complete.

4.16.1. Action Complete should be used when all actions to resolve the problem have been taken and there are no other agencies that need to review the case.

The screenshot shows a web form titled "Action" with a blue header. It contains the following fields and options:

- Refer to different MAJCOM/MPF
- MAJCOM: USAFA
- MPF: USAFA CADETS USAF (USAFA)
- Refer Case To: -Select-
- Follow up on this case: 21-Oct-2008
- Edit Member's Data & Case Info (any input on this form will be lost):
- E-Mail this case (any input on this form will be lost):
- Click when case is ready to close:

On the right side, there are four buttons: Refer, Follow, Edit, and Email. An Action Complete button is located at the bottom right of the form area.

4.16.2. When Action Complete is selected the case changes status to Action Complete and is transferred back to the base or other HQ agency where it was originated. EXCEPTION: If a HQ agency entered the case or it is an ACCS case and the case is referred to base-level for review/input, then upon Action Complete the case will return to the base-level agency that last referred the case above base-level.

4.16.3. Clicking on Action Complete prompts a review of the root cause of the case. Make an appropriate change if the root cause is not correct. It is often difficult to determine the root cause, but your best guess is better than no information at all.

#### **4.17. Bulk Referral of Cases to Subordinate Accounts.**

4.17.1. Some agencies have subordinate agencies. To make bulk referral to one of these sub-agencies click on the "Refer Cases to My Sub-Agencies" link on the homepage under the in-boxes (this link is only present when there are sub-agencies assigned). Clicking on that link produces a list of cases referred to the agency. The cases can be sorted by any column. Click on the box to the left to select as many records as desired. At the bottom of the list is a pull-down menu with all the sub-agencies. Select the one desired and click on Refer. You can select all or deselect all to make mass referral to a single agency even simpler.

#### **4.18. Closing Cases. (NOTE: Only the Agency where the case is currently assigned can "Close" cases).**

4.18.1. Cases are returned to the originating base or HQ agency for closure. They are returned to the "Action Complete" box of the base-level agency that last referred them above base-level or to the HQ level agency that entered the case. EXCEPTION: If a HQ agency entered the case or it's an ACCS case and the case is referred to base-level for review/input, then upon "Action Complete" the case will return to the base-level agency that last referred the case above base-level, not to the HQ agency that entered the case.

4.18.2. There are several steps recommended to closing a case:

4.18.2.1. Review of case for completeness: This is the first and critical step. Be sure the agencies that have taken action to correct the problem did what you expected them to do. If all problems have been corrected, then click on the "Close" button to finalize this case. If all problems are not resolved, then refer the case back to any agency that still needs to take action.

4.18.2.2. Contact with the member: You can do this in any way that your base has established for making that contact. The contact is to let them know that you believe that their problem has been resolved and that you are closing the case.

4.18.2.3. Use of the embedded e-mail function: When you close the case, a preformatted e-mail will appear. If you have already contacted the member through other means, simply click "Don't Send". If e-mail is the preferred method of contacting the member, review the e-mail address to ensure that it is correct, review and modify the text of the e-mail to ensure a complete explanation of corrective action(s) is provided to the member, and click on Send.

## 4.19. Reopening Cases.

4.19.1. At times, a case is closed because it appears that all actions needed to resolve the problem have been taken, only later to discover that the problem is still unresolved.

4.19.2. When it is discovered that a case is not fully resolved:

4.19.2.1. Don't open a new case--that will not get the case the attention it deserves.

4.19.2.2. Reopen the case! **NOTE:** If case has been closed more than 5 days, only the Base CMS POC can reopen the case.

4.19.2.2.1. In the "Enter/Update/Request Status on a Case" section enter the member's SSN, and click on the "Update/Request Status" button.

Enter/Update/Request Status on a Case

**Member SSN:**

Update / Request Status

---

Enter a New CMS Case

---

Enter a New HR Case

4.19.2.2.2. The case that was closed will appear in the list of cases on the member. Click on the Reopen link, make the necessary comments to clarify what still needs to be done, select the appropriate agency from the pull-down menu, and click on Refer.

Current Cases for 111-11-1111 - Lt Col SEVERAL MANY						
Case#	Case Type	Category	Opened	Ref./Closed	Status	Action
1512225	Allotment	Problem	06-Oct-2008	07-Oct-2008	Closed	<b>Re-open</b>
1465381	Debts	Problem	25-Aug-2008	10-Sep-2008	Closed	<b>Re-open</b>
1512226	Assignment Incentive Pay (AIP) - 24thSTS	Process	06-Oct-2008	06-Oct-2008	Referred to DFAS AC Korea AIP/DFAS AC AIP/WMD	<b>Update or Request Status</b>

4.19.2.2.3. The case will transfer to the referred in-box of the agency selected with the original opening date so it will receive priority attention. If the situation is particularly grave, you can use the Request Status process to highlight the case.

## 4.20. Tracking Status of Cases.

4.20.1. Cases can be tracked through several methods.

4.20.1.1. To see a list of all cases on the member, enter the member's SSN or case number in the "Case Lookup" section (see paragraph 4.2.1.5.) and click on "Find Case". Select and case by clicking on the View link to review comments that may have been made by other agencies working the case.

4.20.1.2. Search for groups of cases using criteria in the "Advanced Find" section (see paragraph 4.2.1.5.) to see all cases in a certain category.

4.20.1.3. Use [Standard Reports](#) (see paragraph 4.2.1.6) to see groups of cases meeting the criteria of those reports.

#### **4.21. Using CMS to Provide Oversight.**

4.21.1. The following ideas provide a framework within which to use CMS to provide oversight. Whether these are being used to provide the FSO and MPF chief (and their bosses) a status update or being applied at the MAJCOM level, they will help bring focus to case resolution. This will give you a good handle on what cases are currently open, where they are, and what action is needed to keep them moving forward.

4.21.1.1. Start by looking at the number of total open cases at the base (problem cases, process cases, and inquiries). This sets the stage for the scope of the problem.

4.21.1.2. Determine the status of the problem cases. How many are at base agencies (either "action complete" or pending action at the MPF or FSO); how many are at AFPC; and how many at DFAS? You can only control those cases assigned at your level, but you can influence those at AFPC and DFAS through the use of Request Status function in CMS and by engaging through the MAJCOM.

4.21.1.3. "Action Complete." Where are the cases, how long have they been there, and what procedures do you have in place at your agency for reviewing/closing cases? A good general rule is to allow the "process owners" to be in charge of reviewing/closing cases. In other words, if the problem originated from a MILPDS/MPF problem, then the MPF has ownership. If the problem originated from a DJMS/FSO problem, then the FSO has ownership. This doesn't mean you shouldn't work together on reviewing cases; this is simply a starting point for who should conduct the initial review for accuracy and correctness once a case is tagged "Action Complete". Keep in mind; the AF PersPay Council set a goal that no cases should go beyond 45 days (5 days at base-level, 20 days at AFPC, 20 days at DFAS). It's critical everyone do their part to promptly review cases once they return to a base-agency. If the case wasn't worked completely, then it needs to be re-routed to the appropriate agency for a "re-attack." If DFAS needs to relook, then we suggest sending it to the Warranty box for review. Final note about "Action Complete"--once corrective action is taken and the case is annotated "Action Complete" the case returns to whichever office originally sent the case off-base. If the FSO inputs a case and sends it to MPF Employments, who then sends it to AFPC, the case will ultimately return to the MPF Employments box after its tagged "Action Complete" regardless of whether AFPC or DFAS works the case. Easy rule: Whoever sends it off-base last gets it back first!



4.21.1.4. Other Cases at Base-level Agencies. The IPT should review all cases that are at base-level and determine what action is needed to either (1) route locally for additional information/review, (2) route to AFPC or DFAS for corrective action and (3) review for possible closure. Again, nothing should sit at a base for more than a day or two.

4.21.1.5. Cases at AFPC or DFAS. Generally, this is where the MAJCOM PersPay Team weighs in. They can work with both of these agencies to help nudge cases along in the event of logjams. From the base-level perspective, need to always make sure cases are routed appropriately (generally MPFs to AFPC and FSOs to DFAS) and to include enough info in the descriptions that fully explain what is wrong and what you want done.

4.21.2. Next, you need to periodically perform trend analysis to see what can be done to avoid the creation of new cases if at all possible. Tips for doing your trend analysis:

4.21.2.1. Review all cases closed in the last month and determine if there were any specific problem areas (this is a good indicator for possible training issues within a work section). While reviewing these cases, ask the following questions:

4.21.2.1.1. Was the problem clearly outlined so that a cold reader understands what the issue is? We unnecessarily add to the case processing time by not sufficiently describing what the problem is or what we want someone to fix. Don't make anyone guess. If you don't know exactly what needs to be done, say so. But, then go into EXTREME detail by providing as much history and information as possible.

4.21.2.1.2. Does the case include all necessary information for AFPC and DFAS to take action? See above!!!

4.21.2.1.3. Was the case properly coordinated at base-level (between FSO and MPF) prior to going to an off-base agency? If the case involves accessions, reenlistments, extensions, bonuses, service dates, and other personnel driven actions, then it must be coordinated with the MPF and AFPC before going to DFAS. There are still too many cases going directly to DFAS without proper MPF and/or AFPC coordination. This often drives further delays in the cases since additional info must be requested/verified before they work it.

4.21.2.2. Once the case was returned to base-level, how quickly was the case reviewed for completeness and then closed? If not completely corrected, why not? Was it due to incomplete action by DFAS or AFPC, or was it due to incomplete information? Again, let's learn from every case we do and pass on the lessons to the MAJCOM, AFPC and DFAS.

4.21.2.3. Finally, after reviewing all of the above ask the most important question: What can we do to prevent a similar case from happening? Is it a training issue? A system issue? Communication problem? Process issue? It's not always easy to figure out the root causes and may be impossible in some cases....but, this feedback loop is the most critical part of your IPT. Invest your time wisely and it can pay big dividends for both your customers and your organizations.

4.21.3. That's a snapshot of how to examine your CMS caseload from a manager's perspective....and the bare minimum for conducting your IPT meetings. Your IPT members, MPF/FSO Chiefs, and MSS/CPTS Commanders and MAJCOM IPTs need to be familiar with these aspects of CMS.

#### **4.22. Reserve Case Processing.**

4.22.1. Reserve processing is virtually identical to active duty case processing. Pull down menus offer specific Reserve offices that do not apply to active duty cases that are useful in processing a reserve case.

#### **4.23. Guard Case Processing.**

4.23.1. Guard processing is virtually identical to active duty case processing. Pull-down menus offer specific Guard offices that do not apply to active duty cases that are useful in processing a Guard case.

#### **4.24. MAJCOM/AFPC/DFAS Unique Issues (Entering New Cases).**

4.24.1. When a case is entered at base-level, the servicing MAJCOM and MPF & FSO default to the MAJCOM & MPF of the CMS user. That ensures that the case will be aligned to the appropriate base as it flows through CMS. When a MAJCOM enters a case, the servicing MAJCOM defaults to the MAJCOM of the CMS user and the servicing MPF defaults to the Servicing MPF of the member as recorded in MilPDS. Verify/change this as required using the pull-down menu that is restricted to the bases in that MAJCOM. When a HQ level agency (AFPC or DFAS) enters a case, the servicing MAJCOM and MPF default to the member's servicing MAJCOM and MPF as recorded in MilPDS. Verify/change as necessary. Pay particular attention to these data elements for members that were recently separated or who have recently returned to Active Duty. They often have a servicing MAJCOM & MPF that is associated with their separation that will need to be changed.

#### **4.25. Standardized Reports.**

4.25.1. CMS Reports contain a number of pre-formatted reports. Most are limited to the scope of the agency requesting the report, i.e. base-level sees all the information from their base, MAJCOM sees all of their MAJCOM, and HQ level sees data from the entire AF.

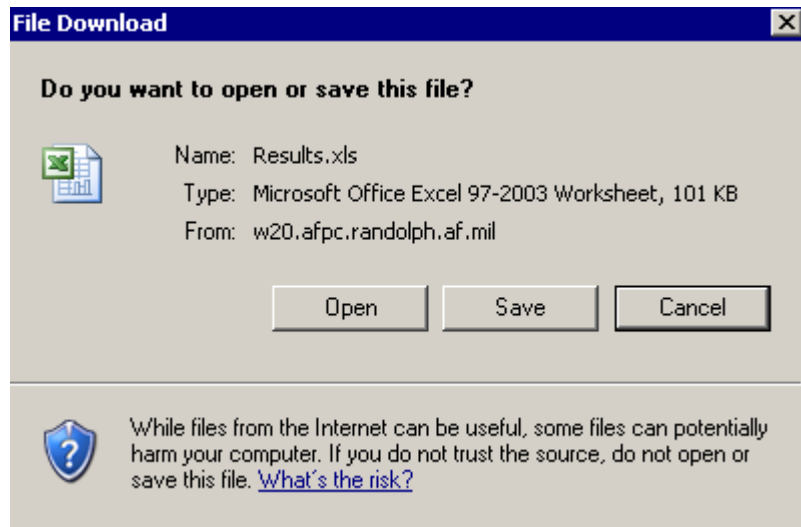
4.25.2. Summary reports are designed to allow the user to drill down various ways by clicking on the Report link and then clicking on the Problem Type or Status. Agencies above base-level will be able to drill down by Problem Type or Status, then by organization/agency as well.

4.25.3. Statistical reports show the numbers being reported to senior leadership related to number of cases at the beginning of the month, number of cases opened during the month, number closed during the month and average time it takes to close the cases. Base-level users see it for their base, MAJCOM, for their MAJCOM and HQ for the entire AF broken down by Active Duty, Guard, and Reserve.

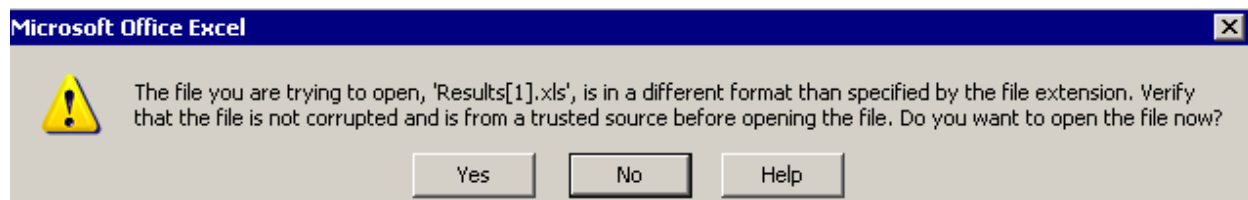
4.25.3.1.1. **NEW FEATURES ADDED TO REPORTS: "EXPORT" BUTTON AND "SORT BY COLUMNS" OPTION.** You can now sort the reports by each "Column Heading". And for many of the reports, each page of the report defaults to 20 cases per page. NOTE: You can now change the number of cases displayed on each page to 10, 20, 50, 100 or all. Just click on the drop down menu for "Records per Page" and select your choice (see picture below). You may view each individual case by clicking on the "View" link.

Cases Older than 30 Days (Problem ONLY)							
Export to Excel							
<< < Page: 1 of 10 > >>		Records per page: 100					
orgmainname	orgmpfname	Mo	CaseID	Opened	Days	Status	
AFOSI	ANDREWS AFB MD (AFOSI)	07/100	39720	02-Jul-2008	109	Follow by 20-Oct-2008/DFAS AC TD 90-94	
		All					

Also, if you want to export this report to an excel spreadsheet, just click on the "Export to Excel" button. You'll get following message:



You can now save the report or open the report in excel. When you click on "Open" you'll get following message:



Always click on the “Yes” button. This is a system generated message and cannot be disabled. After clicking on the “Yes” button, excel will open and the report will be exported to excel automatically.

Most CMS users only use a small number of these reports. Therefore, the “My Favorite Reports” section was developed to allow individual CMS users to move their “Favorite” reports from the “CMS Reports” page to the CMS Home Page. To add reports to the “My Favorite Reports” section, click on the “Reports” link. Then under the “Action” column, find the reports you use often and then click on the “Add to Favorites” link. This will add the report to your “My Favorite Reports” section. After adding the report to your “Favorites”, the “Add to Favorites” link will change to “Remove from Favorites”. So it’s easy to add and delete reports to the “Favorites” section of the CMS Home Page. CMS Reports... (see picture below). This section contains all reports available to your agency. You can sort by report ID or Report Name and add to favorites.

CMS Reports		
<u>ID</u>	<u>Report Name</u>	<u>Action</u>
1	<a href="#">Cases Older than 120 days (Problem Only)</a>	Add to Favorites
6	All Cases over 30 Days	Add to Favorites
7	All cases Not Closed or Action Complete	Add to Favorites
10	Count-people with Problems (By Base)	Add to Favorites
16	ALL OPEN CASES ASSIGNED TO A BASE LEVEL AGENCY (Pay & MilPDS Issues)	Add to Favorites
17	Stagnant Cases -- > 30 Days at Base-Level Agency	Add to Favorites
18	Stagnant Cases - > 20 days in agency above Base	Add to Favorites
31	Stagnant Cases -- > 5 Days at Base Agency- "Action Complete"	Remove from Favorites
33	Action Complete - All Cases	Add to Favorites
34	Stagnant Cases -- > 5 Days at Base Agency- "Action Not Complete"	Remove from Favorites

When you add reports to the “My Favorite Reports” section of the CMS Home Page, you can review these reports from the CMS Home Page without navigating to the “Reports” section.

## My Favorite Reports

[Goto Reports >>](#)

- Base AD CSS Listing
- All open cases-sorted by member PAS - 2
- Stagnant Cases -- > 5 Days at Base Agency- "Action Complete"
- Stagnant Cases -- > 5 Days at Base Agency- "Action Not Complete"