



DEPARTMENT OF THE NAVY
COMMANDER NAVY REGION SOUTHWEST
937 NO. HARBOR DR.
SAN DIEGO, CA 92132-0058

IN REPLY REFER TO:

COMNAVREGSWINST 5230.1
06HD
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COMNAVREGSW INSTRUCTION 5230.1

Subj: PERSONNEL TRACKING SYSTEM (PERTS)

Encl: (1) Action Office/Responsibilities List

1. Purpose. To outline responsibilities for accessing, maintaining, updating, and deleting information on PERTS. This instruction applies to all commands and personnel under the cognizance of Commander, Navy Region Southwest (CNRSW).

2. Background. The Personnel Tracking System (PERTS) is part of the Total Regional Execution (TREX) business application, which provides managers a tool to manage personnel and billets. Data stored in PERTS is for official use only and is subject to the Privacy Act.

3. Discussion

a. PERTS lists all civilian and military employees assigned and provides:

(1) Personnel data from each employee's legacy personnel system downloaded from the Navy Standard Integrated Personnel System (NSIPS), the Defense Civilian Personnel Data System (DCPDS) and the Non-appropriated Fund (NAF) personnel system weekly. Data includes expiration of active obligated service, projected rotation date, hire date, transfer date, specialty skills, within grade increase date and much more.

(2) Recall information must be entered by each employee. Every employee has access to PERTS using the Regional Employee Workbench. USERID, password and help in using PERTS is located on the USERGUIDE on the PERTS homepage. PERTS maintains data on personnel in the past, present and future. By date tracking, data on personnel who have transferred or who are expected gains can be retrieved.

(3) PERTS provides a summary of all Activity Manning Document (AMD), Strategic Sourcing, and Funding Status data for every billet within CNRSW.

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b. Billet data is downloaded monthly from the Total Force Manpower Management System Micro Manpower Change Application (TMMCA). Some Strategic Sourcing data is maintained in the Business Office. The Resource Management Office maintains some of the funding information.

(1) The history of each position is maintained in PERTS.

(2) The Manpower Office assigns people to billets in PERTS.

c. PERTS is readily available online for locating personnel, organization rosters, recall information, and other related personnel reports.

d. Personnel requiring access other than their own record must submit an email request to their Program Manager (PM) and identify which program and UIC access is needed. PM's will forward this request to the Director, Manpower with sufficient justification for data access. The Director, Manpower will forward approvals to the PERTS help desk for set-up.

4. Policy. PERTS is the Region source for workforce information. In times of emergency it will be the primary source to provide recall information. In addition, the database will be used for population reports, recall rosters, security reports, etc. Information on all Region military and civilian personnel is entered into the system via DCPDS, NSIPS, Morale, Welfare and Recreation (MWR) and master employee record (MER) weekly. Leave and Earnings Statement (LES) and TMMCA data are entered monthly. Contractor and personal local information are entered into the system manually.

a. The Director of Manpower has overall responsibility for the integrity of the PERTS database.

b. Every military member, appropriated fund civilian, and NAF employee assigned to a Navy Region Southwest UIC must be entered in PERTS. Normally, each person's record will be automatically created by download from the legacy personnel systems. All others must be manually created in PERTS. Personnel that have Regional duties and have a need to see data in PERTS will be manually entered with a person type of "Regional Team Support". Military temporarily assigned duty (TAD) to the Region longer than six months will also be manually created in PERTS by that PM's PERTS Administrator. Contractor

personnel that work as contract employees must also be entered by their PERTS Administrators.

c. Each PM's PERTS Administrator will validate data periodically to ensure accuracy.

d. Base Administrative Officers are responsible for ensuring military personnel who are checking in or out of their UIC's are entered in PERTS with the correct arrival date. In cases where military personnel are transferred to different programs within the same UIC, Base Administrative Officers are responsible for updating the working admin code and working program in the group field on the assignment page.

e. All information maintained in PERTS is for official use only. Any unauthorized access or disclosure will result in disciplinary action.

5. Training. The PERTS User Guide link is available on the PERTS homepage in the upper left corner. It details how each individual can add recall data and shows how to use the workbench queries. PERTS Administrators and personnel or billet process owners must attend a two-hour training course which can be arranged by contacting the Manpower Office.

6. Action/Responsibilities. Enclosure (1) identifies action offices and responsibilities for PERTS oversight, the Manpower Office, PERTS Administrators, PM's, Site Managers, Base Administrative Officers, Resource Management's Civilian Labor Manager, PERTS Systems Administrators, employees and contractor personnel.



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ACTION OFFICE/RESPONSIBILITIES LIST	
Action Office	Responsibilities
PERTS Functional Owner - Military Manpower (N06)	<ul style="list-style-type: none"> • Ensure personnel and billet downloads occur as scheduled. Verify data. • Approve Program Manager's requests for assigning responsibility and direct PERTS Systems Administrator to set up access accordingly. • Schedule PERTS Training, as needed. • Chair PERTS Working Group Committee and prioritize enhancements, updates, and upgrades. • Attend the TREX Steering Committee Meetings as the PERTS representative. • Work closely with PERTS Systems Administrator.
Program Managers	<ul style="list-style-type: none"> • Ensure personal local information for all personnel under their cognizance is entered in PERTS and maintained up-to-date. • Grant access to the personnel data commensurate with the need to know for that job. Data in PERTS is protected by the Privacy Act. • Identify PERTS Administrators and personnel authorized to receive controlled PERTS reports to the Functional PERTS Owner in writing. • Ensure PERTS Administrators receive training and attend meetings.
Military Manpower Office (N06)	<ul style="list-style-type: none"> • Enter military personnel orders information into PERTS to show prospective gains and losses for the Region. • Assign military personnel to billets in PERTS. • Assign each billet to a program. • Maintain the AMD for both military and civilian personnel, so PERTS reflects the most current billet information. • Monitor the unassigned listing and ensure each person is assigned to a

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ACTION OFFICE/RESPONSIBILITIES LIST	
Action Office	Responsibilities
	program and a billet if one is available.
Business Office (N02)	<ul style="list-style-type: none"> • Maintain Strategic Sourcing data in PERTS for each billet.
Resource Management Office (N80)	<ul style="list-style-type: none"> • Maintain Civilian Labor Data in PERTS for each person and each billet.
Base Admin Office	<ul style="list-style-type: none"> • Check in/out military personnel using PERTS. Update latest hire date to the report date of each person. Upon transfer, suspend assignment of person in PERTS effective the date of transfer. • Serve as the main PERTS POC for the Base.
Regional Admin (N03H)	<ul style="list-style-type: none"> • Ensure Base Admin Personnel are trained in PERTS. • Monitor the database to ensure PERTS Administrators are performing their duties properly. • Oversee the Region's Check-in/out process in PERTS.
PERTS Systems Administrator	<ul style="list-style-type: none"> • Obtain legacy system data and load according to schedule. • Notify PERTS Functional Owner if data is not loaded into system according to schedule. • Serve as the PERTS POC for technical problems.
PERTS Administrators	<ul style="list-style-type: none"> • Upon check in for military personnel, enter the correct admin code for each person in the "Group" data field under "Working Admin Code" on the assignment page. • Perform personnel check-outs by "suspending" the assignment status effective the date of check-out. • Maintain the data integrity of PERTS personal local information. Review information within PERTS to ensure all personnel data is up-to-date and accurate. • Attend all PERTS and Privacy Act

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ACTION OFFICE/RESPONSIBILITIES LIST	
Action Office	Responsibilities
	training. <ul style="list-style-type: none">• Assist personnel in trouble shooting problems with PERTS.
Employees and Contractor Personnel	<ul style="list-style-type: none">• Enter Regional Employee Workbench and enter work and home addresses and phone numbers. Specify local point of contact for emergency situations.• For assistance, contact designated Functional PERTS Administrator.