## AIR FORCE INTERAGENCY TRANSFER GUIDE

### Change History

Update the following table as necessary when this document is changed:

| Date | Name | Change Description |
|------|------|--------------------|
| 4/7/2004 | O Mays | Created Document |
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**Purpose**

This handout is prepared to provide comprehensive step-by-step instructions for Air Force users when gaining an employee who is moving from another DoD component. Since Air Force is not using the CAO process, most references to the CAO process have been removed from this document, except in those cases where pre-configured windows contain the name CAO. **Changes to the instructions include relocation of the CAO/Transfer Request form, system generation of the applicant record by simply clicking a button and automatic generation of the Separation action.**

**References**

- [The DCPDS User Guide, Module 4, Chap 11 dated Mar 2004](#)
- CPMS CAO Frequently Asked Questions

**Menu Path**

Use the following navigation path(s) to begin this task:

- Select **Request for Personnel Action** > **+CAO/Transfer**> **CAO/Transfer Request** to go to the **CAO/Interagency Transfer Control Panel**.
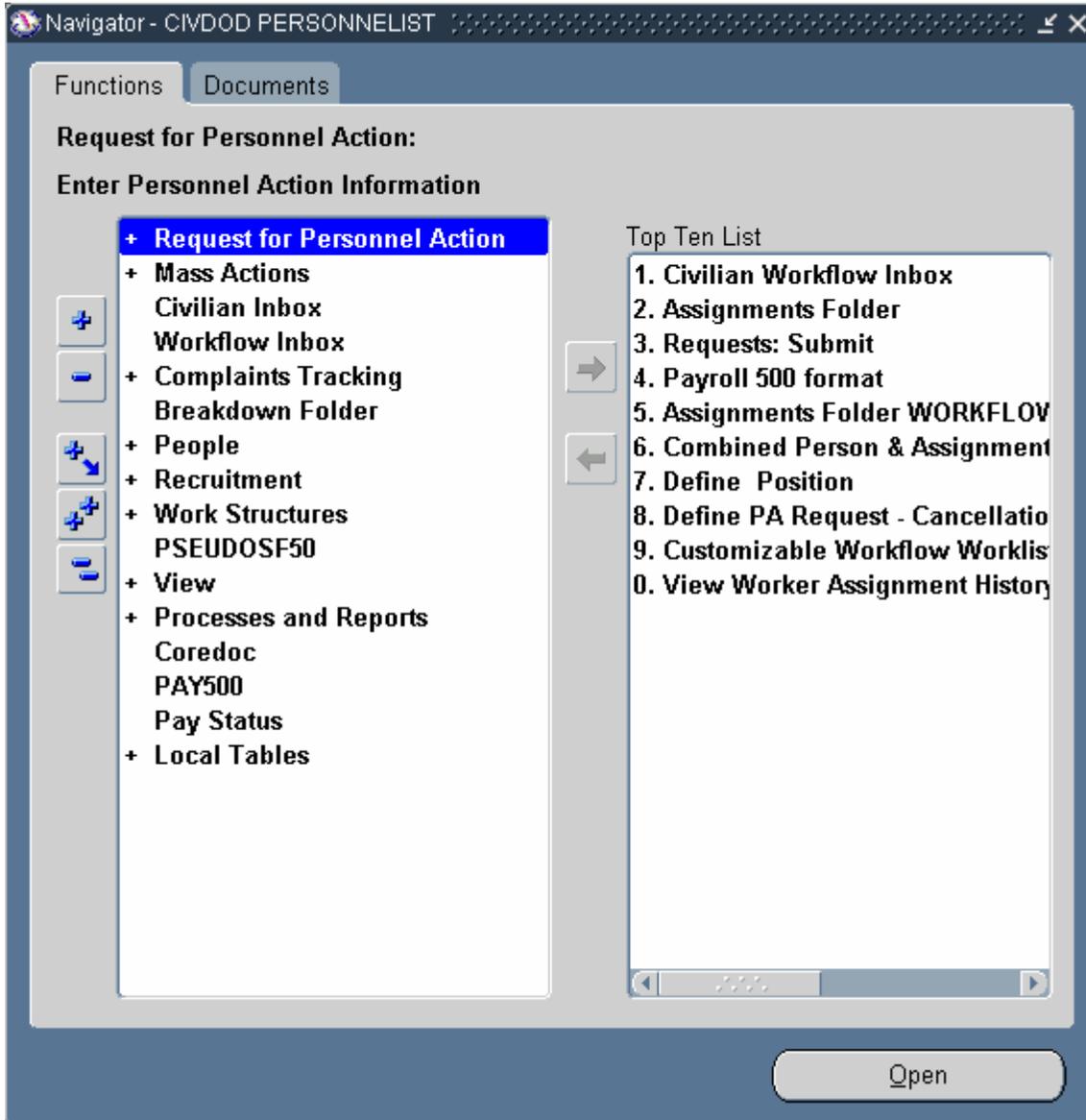
**Helpful Hints**

- **DO NOT BUILD THE APPLICANT** MANUALLY THE NEW PROCESS WILL BUILD THE APPLICANT FOR YOU WITH JUST THE CLICK OF A BUTTON.
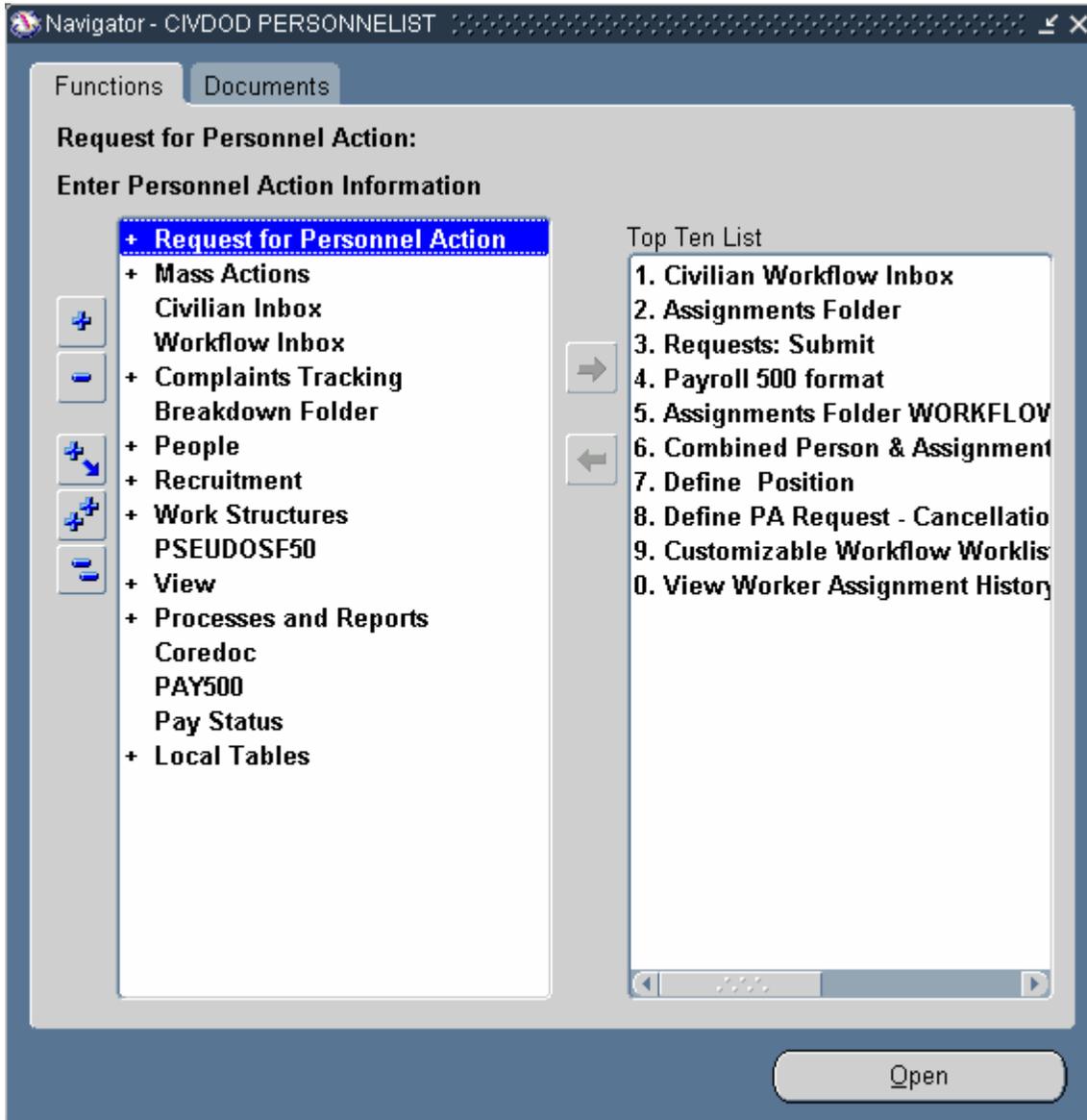- **DO NOT PLACE THE APPLICANT NAME ON THE RPA** UNTIL THE SYSTEM COMPLETES THE APPLICANT BUILD

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**Procedure**

**1.**    Start the task using the DCPDS Navigator

**Navigator - CIVDOD PERSONNELIST**

**2.** Double-click  **+ Request for Personnel Action** .

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**3.** Click **+ CAO/Transfer** .

Navigator - CIVDOD PERSONNELIST

Functions | Documents

Request for Personnel Action:CAO/Transfer:

- Request for Personnel Action
  Appointment
  Award / One-Time Payment
  Cancellation/Correction
  DOD Correction Process
+ CAO/Transfer
+ Change Actions
  Details
  Conversion to Appointment
+ Conversion to Demo Project
  Extension of NTE
  Federal Position Change
  Living Benefits
  Non Pay / Non Duty Status
  Realignment
  Reassignment
  Long-term Training
  Return to Duty
  RIF Exception
+ Salary Change
  Separation
  Foreign Language Prof Pay
  USUHS Salary Change

Top Ten List
1. Civilian Workflow Inbox
2. Assignments Folder
3. Requests: Submit
4. Payroll 500 format
5. Assignments Folder WORKFLOV
6. Combined Person & Assignment
7. Define  Position
8. Define PA Request - Cancellatio
9. Customizable Workflow Worklis
0. View Worker Assignment History

Open

**4.** Double-click [ CAO/Transfer Request ]. The CAO/Interagency Transfer Control Panel Status tab will display

## CAO / Interagency Transfer Control Panel



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**5.** Click Initiate .

**CAO / Interagency Transfer Control Panel**



**6.** Complete all of the following required fields:

| Field Name | R/O/C | Description |
|---|---|---|
| SSAN | R | Input SSAN without dashes<br>**Example:** 555555555 |
| SOID | R | Input the Losing Agency SOID.<br>Make sure that you have obtained the correct Losing Agency SOID or the request will abort.<br>**Example:** CG |

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| Field Name | R/O/C | Description |
|---|---|---|
| Gaining Agency Code | R | Input the the Gaining Agency Code.<br><br>ℹ You must include both the component code (AF) and the sub-element (Major Command) code for a total of 4 characters.<br>**Example:** AF1L |
| SOID for the Gaining Office ID | R | Input the SOID for the Gaining Office ID.<br><br>ℹ Enter the two digit SOID for the Gaining Office ID<br>**Example:** 9S |
| Gaining Payroll Office ID | R | Input the Gaining Payroll Office ID.<br>**Example:** DE |
| Enter the appropriate Nature of Action Code (NOA) | R | Enter the appropriate Nature of Action Code (NOA).<br>**Example:** T130 |
| RPA Effective Date | R | Input the the RPA Effective Date.<br><br>ℹ Enter the effective date of the transfer action.<br>**Example:** 04-APR-2004 |
| Point of Contact for the Request | R | ℹ Enter the name and DSN for the Human Resources Specialist processing the request.<br>**Example:** John Doe DSN: 665-2899 ext 4843 |

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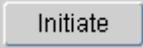
**7.** Click [ Initiate ] and the following Forms window will display.

**Forms**

Forms ⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚⬚ ✕

Request has been initiated for 328524663. Please check the status in 30-60 minutes.

( OK )

**8.** Click ( OK ) .

(i)    Once the request is initiated the information input will be cleared from the request screen.  DCPDS begins processing the request.  This allows user to continue working in other areas of the HR database while the request is being processed.  Since the request uses Concurrent manager for processing, users can periodically check the request status by returning to the **CAO/Transfer** request form and clicking <**Refresh**>.  When the data has been updated the **Current Status** field will change.  See below

**9.** Click the [ Status ] tab.

**10.** Click Refresh

ℹ️ **To view any change in Status you must click the <Refresh> button on the Status Tab**
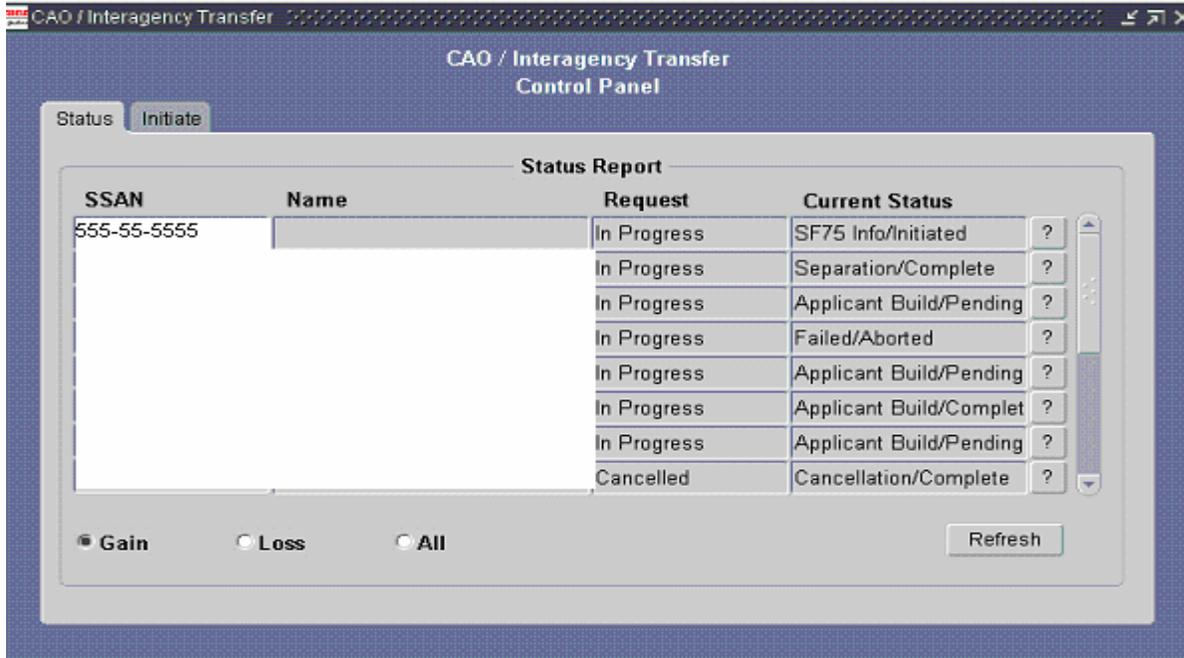


ℹ️ Note: The current set up allows for full access to the Status Tab for all Users. Users that are issued secure views will only be able to view the records identified with that view.  Using the SSAN **(F11, Ctrl F11)** to search for a specific request will prevent the user from scrolling through numbers of active request.

**11.** Once the **CAO/Transfer** request is submitted a **SOID Validation** is made.  The system insures that both the Losing and Gaining SOIDs are valid before an attempt is made to retrieve the SF-75 Information.  (This can only be viewed by clicking the "All" radio dial at the bottom of the Status tab).

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**12.** Click ⊙ **All** .

## CAO / Interagency Transfer



**13.** Click the question mark [?] to the right of the specific request to display the CAO Details window for that request .

ℹ️ Clicking on the "**?**" will display the CAO Details Window. Notice that the "SOID Validation" has been initiated.

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## CAO Details



![CAO Details window]

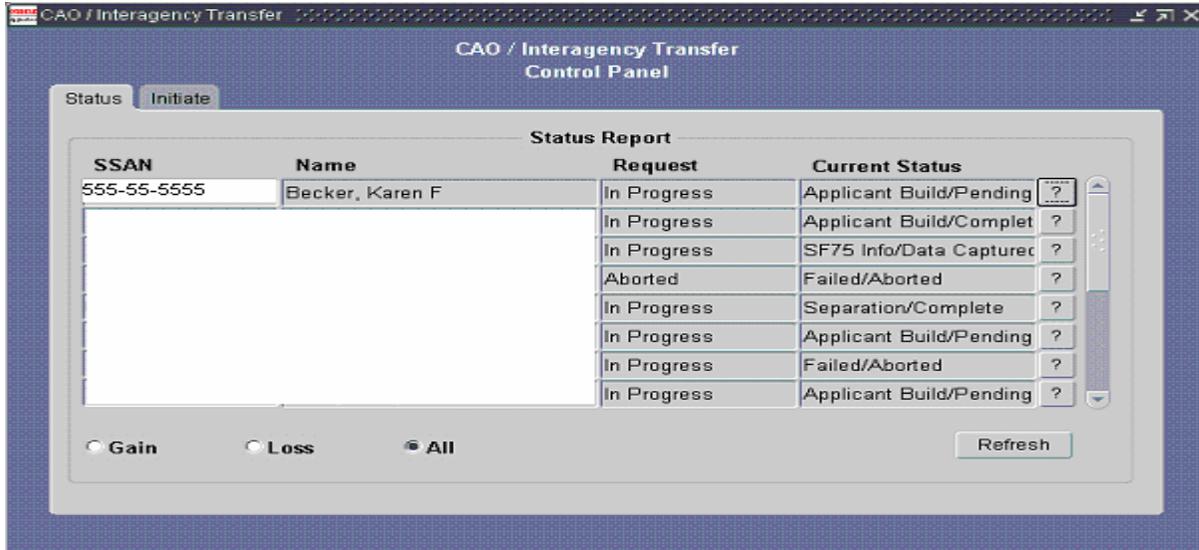| PHASE | STATUS | STATUS DATE | MESSAGE |
|---|---|---|---|
| SOID Validation | Initiated | 06-APR-2004 14:20:24 | Gaining Region |
| SF75 Info | Initiated | 06-APR-2004 14:20:38 | Gaining Region |
| SF75 Info | Acknowledged | 06-APR-2004 13:17:27 | Interface Server |
| SF75 Info | Acknowledged | 06-APR-2004 14:16:39 | Losing Region |
| SF75 Info | Data Captured | 06-APR-2004 14:16:49 | Losing Region |
| SF75 Info | Data Copied | 06-APR-2004 13:22:59 | Interface Server |
| SF75 Info | Complete | 06-APR-2004 14:30:58 | Ready for Applicant Build |
| Applicant Build | Pending | 06-APR-2004 14:31:01 | Click Build Applicant button |

Notice that the information input on your **CAO/Transfer** request appears in the **Transaction** region of the form. This provides you with all the information initially input on your request form.

**The Key field is a combination of the Gaining Region, Sequence Number, and Losing Region and is used for tracking the Transfer Request. The Key informs the users of the Gaining/Losing region. A request processed between two Regions will show the Gaining/Sequence Number/Losing in the Key field (e.g. REG03. 16399.REG10)**

The **CAO Details** shows "**SF-75 Info**" request initiated by the Gaining Region. A date, time stamp is included in the Status Date field for each Phase in the **CAO Details** window. DCPDS is programmed to continue processing the current Phase until a response is received, a communication problem between Region/Interface server would be indicated when a transaction remains at one Phase for an excessive amount of time.

The <**Cancel Request**> button is now active. The user has the ability to cancel the **CAO/Transfer** request once the button is active. The request can be cancelled anytime prior to the update of the RPA. Once an RPA has been processed user must cancel the accession using the Cancellation/Correction RPA.

➔ **The current phase/status has changed to Applicant Build Pending.** This indicates that DCPDS is waiting for the Applicant record to be created. **Do not** enter the Applicant record in RPA until this process is completed.

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**14.** Click Build Applicant .



**Forms**



**CAO Details**

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**15.** Close the CAO Details Window using the ⊠ in the upper right hand corner of this window.

## CAO / Interagency Transfer
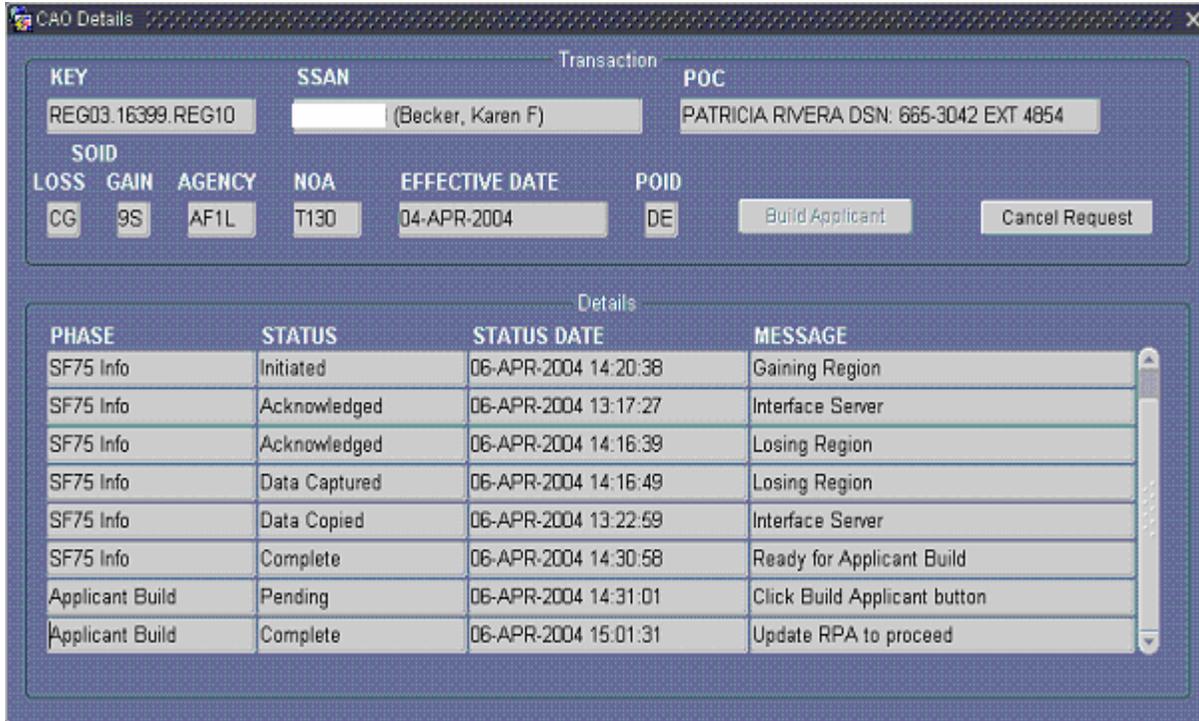


**16.** Click [Refresh] . The Current Status changes to **Applicant Build/Completed**
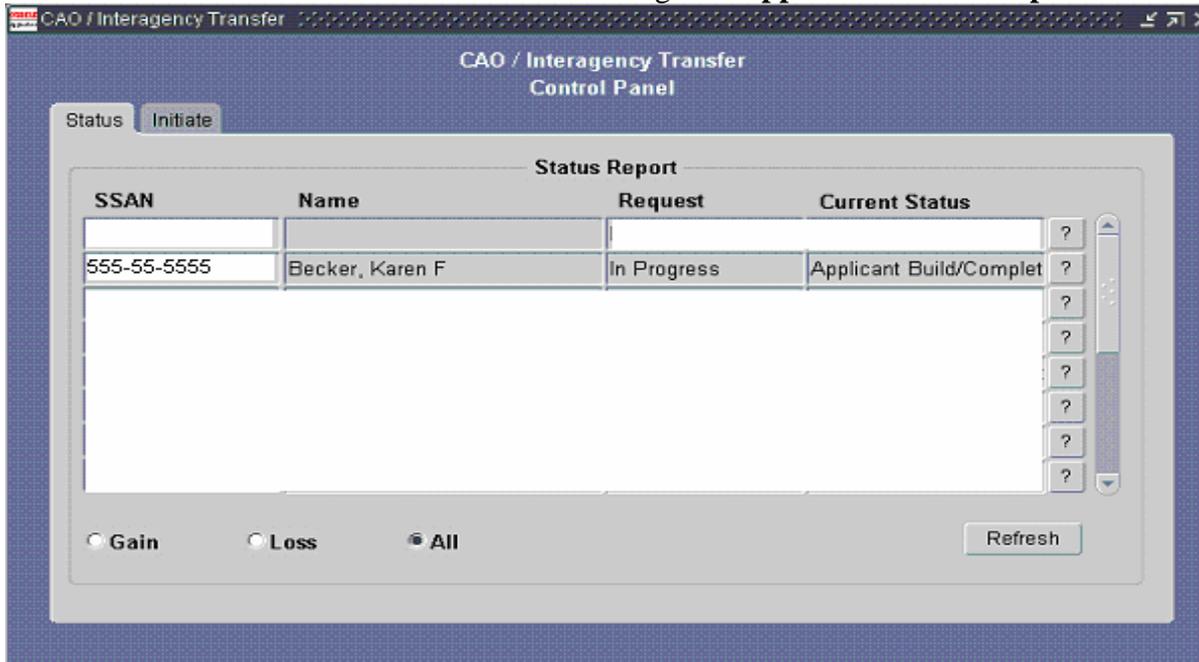
**17.** Click [?] .and the Message changes to Update RPA to proceed

## CAO Details



| PHASE | STATUS | STATUS DATE | MESSAGE |
|---|---|---|---|
| SF75 Info | Initiated | 06-APR-2004 14:20:38 | Gaining Region |
| SF75 Info | Acknowledged | 06-APR-2004 13:17:27 | Interface Server |
| SF75 Info | Acknowledged | 06-APR-2004 14:16:39 | Losing Region |
| SF75 Info | Data Captured | 06-APR-2004 14:16:49 | Losing Region |
| SF75 Info | Data Copied | 06-APR-2004 13:22:59 | Interface Server |
| SF75 Info | Complete | 06-APR-2004 14:30:58 | Ready for Applicant Build |
| Applicant Build | Pending | 06-APR-2004 14:31:01 | Click Build Applicant button |
| Applicant Build | Complete | 06-APR-2004 15:01:31 | Update RPA to proceed |

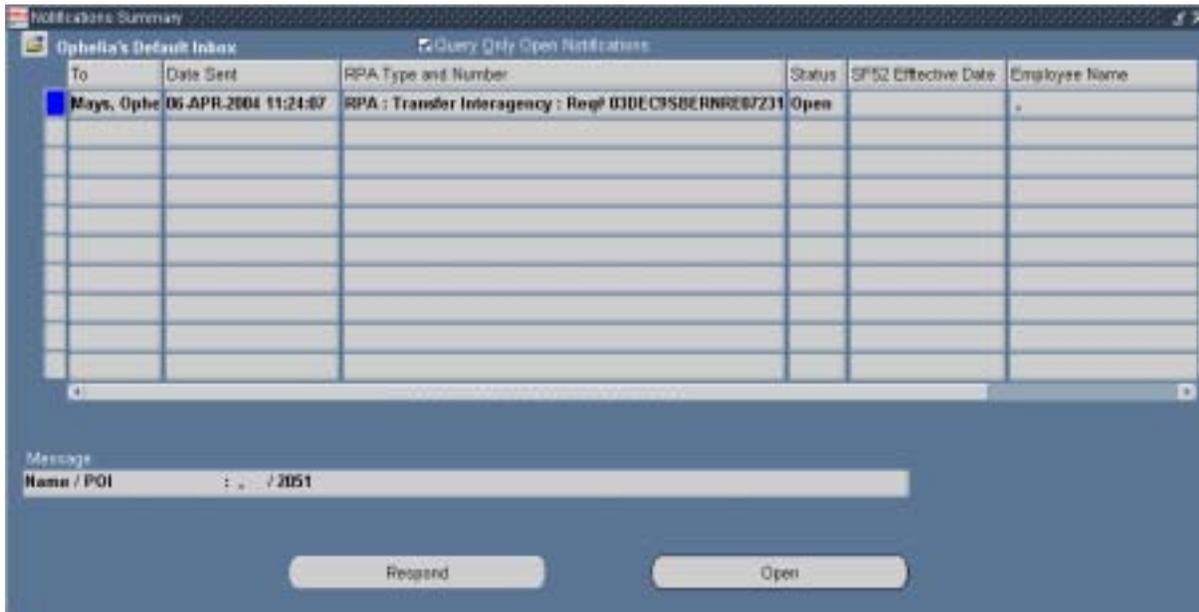➔ **Completing and Updating the Transfer RPA**

**18.** Access the navigator using the CIVDOD PERSONNELIST responsibility

**Navigator - CIVDOD PERSONNELIST**
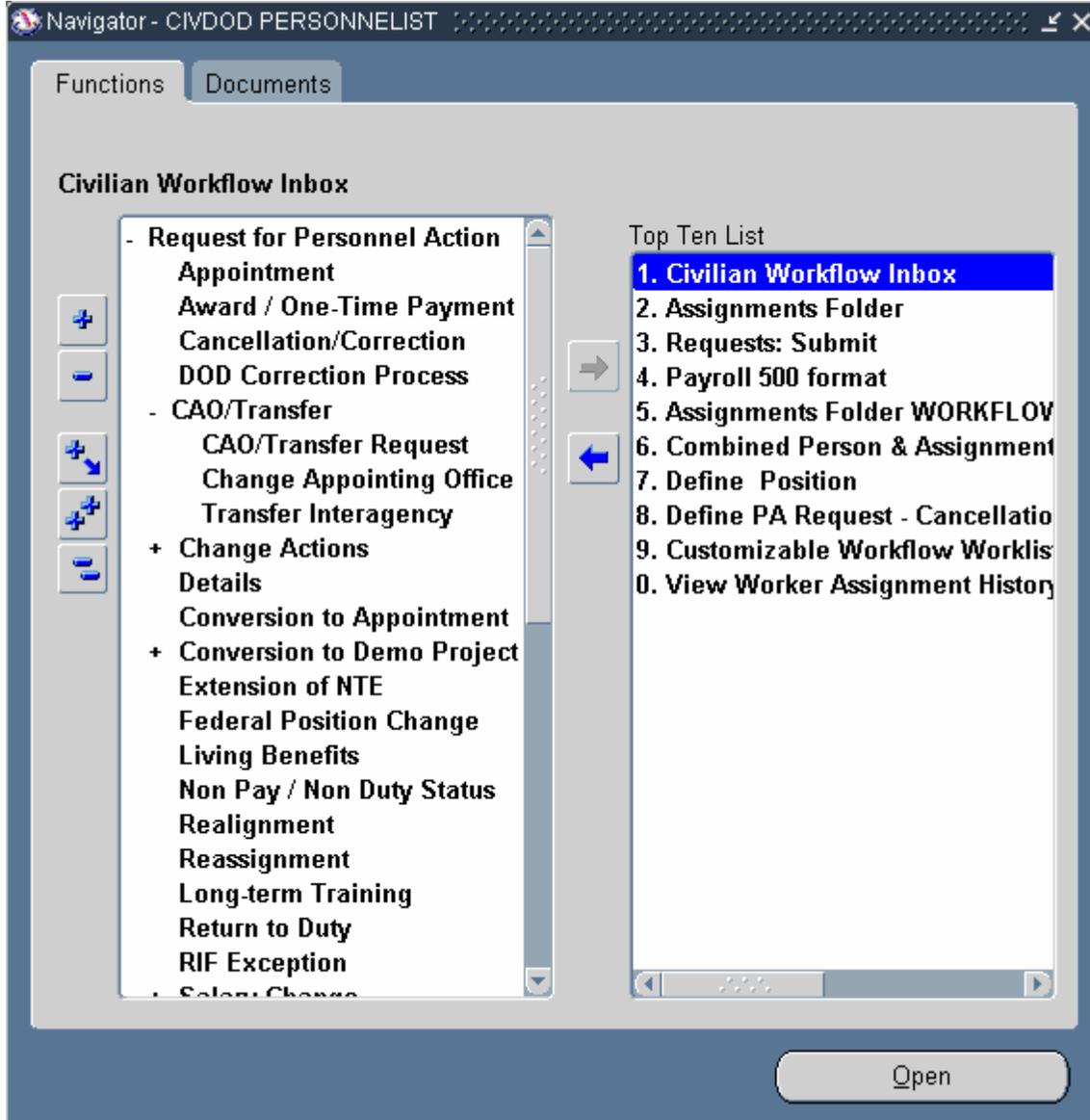


**19.** Double-click **1. Civilian Workflow Inbox** .

**Notifications Summary**



**20.** Click [ Respond ] on the Transfer RPA.

## Request for Personnel Action (Transfer Interagency, Routing Group:AIR FORCE)

Request for Personnel Action (Transfer Interagency, Routing Group:AIR FORCE)

Change Family    Refresh    Status **AUTHORIZED**

| Requesting Info | Position Data | Employee and Position Data | Remarks and Address |

**PART A - Requesting Office**

| 1 Actions Requested | 2 Request Number |
| --- | --- |
| **Transfer Interagency** | 03DEC9SBERNRE0723125 |

| 3 For Additional Information Call (Full Name) | Telephone Number | 4 Prop. Eff. Date | ASAP |
| --- | --- | --- | --- |
| Bernreuter,Vickie T | 6182293876 | | ☑ |

| 5 Action Requested By (Full Name) | Title | Request Date |
| --- | --- | --- |
| Bernreuter,Vickie T | BUDGET TECHNICIAN | 18-DEC-2003 |

| 6 Action Authorized By (Full Name) | Title | Concurrence Date |
| --- | --- | --- |
| Bernreuter,Vickie T | BUDGET TECHNICIAN | 18-DEC-2003 |

**PART B - For Preparation of SF 50**

| 1 Last Name | First Name | Middle Name |
| --- | --- | --- |
| | | |

| 2 Social Security Number | 3 Date of Birth | 4 Effective Date |
| --- | --- | --- |
| | | |

**FIRST ACTION**

| 5-A Code | 5-B Nature of Action |
| --- | --- |
| | |

| 5-C Code | 5-D Legal Authority |
| --- | --- |
| | |

| 5-E Code | 5-F Legal Authority |
| --- | --- |
| | |

**SECOND ACTION**

| 6-A Code | 6-B Nature of Action |
| --- | --- |
| | |

| 6-C Code | 6-D Legal Authority |
| --- | --- |
| | |

| 6-E Code | 6-F Legal Authority |
| --- | --- |
| | |

| History | Extra Information | Person | Position | Others... |

**21.** As required, complete/review the following fields:

| Field Name | R/O/C | Description |
|---|---|---|
| Effective Date | R | RPA Block 4 Effective Date . |
| | | **Example:** 04-APR-2004 |

## Request for Personnel Action (Transfer Interagency, Routing Group:AIR FORCE)



**22.** As required, complete/review the following fields:

| Field Name | R/O/C | Description |
|---|---|---|
| Social Security Number | R | Description of the Social Security Number. |
| | | Complete the RPA Requesting Info Tab Block 2, SSAN with dashes. |
| | | **Example:** 555-55-5555 |

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23. Complete/review all of the required fields on each tab of the RPA and applicable Extra Information

24. **UPDATE HR**

25. You have completed this task.

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**Result**

You can now view additional CAO Details information by returning to the CAO/Interagency Request Form> CAO/Interagency Transfer Control Panel.

**26.** Query for the SSAN using **F11, Ctrl F11**
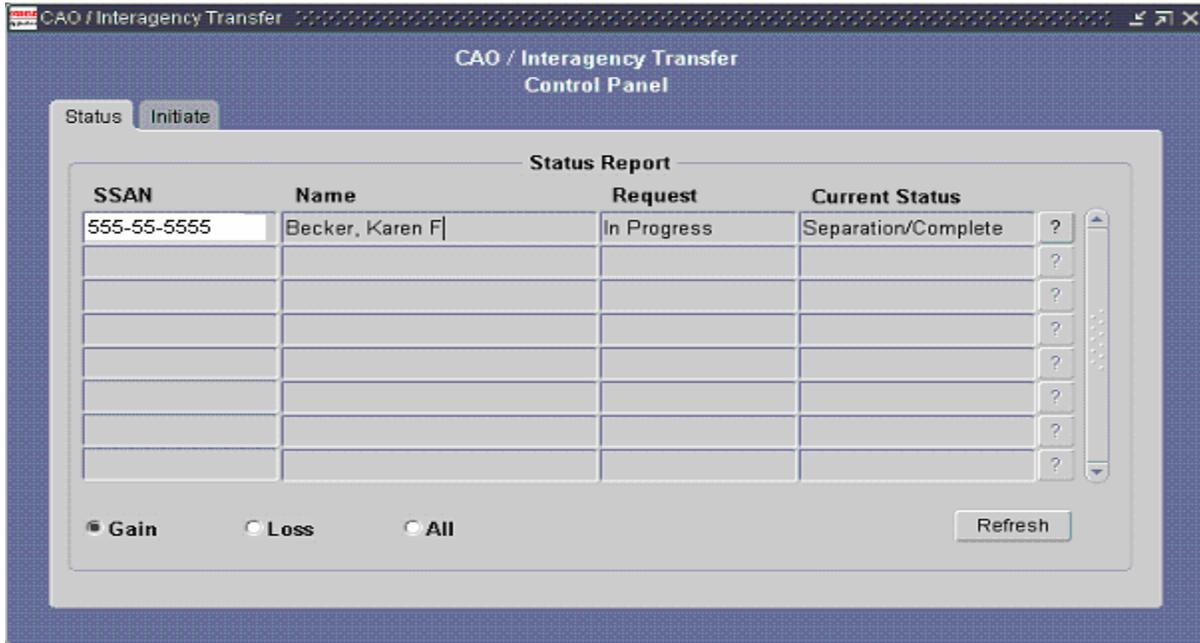


**27.** Click [ ? ] to view the CAO Details window.

**28.   CPMS Frequently Asked Questions**.

| | |
|---|---|
| (1) How long does the CAO/Transfer Request remain in the database from the date it is input if the process is not finalized until a later date?  Appendix C indicated all transaction data is being purged from the gaining and the losing regions 14 days? | DCPDS will purge a CAO/Transfer Request fourteen days after that request Status has been updated to "Canceled, Completed, Failed or Aborted". |
| (2) When initiating a request do the users still have a ten day window prior to the effective date and ten day window after the effective date?<br><br>? | **No.**  The CAO/Interagency Request can be input at any time, there is no longer a system edit which only allows the request to be submitted ten days prior to the Effective Date.  However, CPMS is recommending that users continue processing the request form no more than ten days prior to the effective date of the RPA to insure the current employee information is received from the Losing Region.  The request will be automatically purged from the database fourteen days after completion |
| (3) Please clarify the **KEY field**. The guide mentioned that it is the unique identifier for the CAO/Transfer Request? | The Key field is a combination of the Gaining Region, Sequence Number, and Losing Region and is used for tracking the CAO/Transfer Request.  The Key informs the user of the Gaining/Losing region.  A request processed on a single Region will show the same information for both the Gaining and Losing the Key field (e.g. SQT11.1402.SQT11).  A request processed between two Regions will show the Gaining/Sequence Number/Losing in the Key field (e.g. Reg01.2323.Reg10). |
| (4) Will users who input the interagency request receive all of the employee's data such as all of the benefit information (TSP, FEGLI, FEHB), education, tenure dates, military dates, etc., that would normally be on the SF75? | The CAO/Transfer process extracts SF75 information from the Losing Region for the Employee record identified in the request.  The data is then populated in the Applicant record that was created by clicking the "Create Applicant" button.   The data can be viewed by navigating to the People > Enter and Maintain > Extra Information or Special Information DDFs as well as from the RPA > Extra Information > CAO Loss DDFs |

| (5) Will users need a hard copy of the SF75? | There is only one documented case where users will have to obtain hard copy SF75 information. This is when the CAO/Transfer request rejects because there are two Employee records on the Losing Region<br><br>Dates of tenure must be obtained along with the losing agency SOID.  Therefore, the Functional Clearinghouse is recommending that we continue to obtain SF-75 information. |
|---|---|
| (6) Under the "CAO/Interagency Transfer Control Panel" "Status Tab" users can query on a SSN and receive only that record.  If a North Central user chooses to select one of the three radio buttons (Gain, Loss or All) will only North Central's data will be retrieved and displayed? | The current set up allows for full access to the Status Tab for all Region users.  Users that are issued "Secure Views" will only be able to view those records identified with that view.  If a user using a Global view clicks either of the radio buttons they will see all of the available records that meet the criteria for that Region server.  Using the SSAN to search for a specific request will prevent the user from having to scroll through all of the active requests |
| (7) Under the "Initiate Tab" should the POC be the user processing the action or the Region's CAO POC? | The POC field can be used to input either the User processing the action or the Region's CAO POC.  A policy determining how this field is to be used should be developed within each Component. |
| (8) Is there an approximate timeframe of how long the entire CAO process should take (from the time the user submits request, to building the applicant and the data flowing onto the RPA) ? | The entire CAO process (from the time the request is "Initiated" to the "Applicant Build/Pending") should take no longer than one hour.  This process is dependent on connectivity to the Gaining, Losing and Interface servers.  If users notice a delay of more than thirty (30) minutes at any time between the "SOID Validation" and "Applicant Build/Pending" phase, it is possible that a server (Region or Interface) is down. |
| (9) Under "Updating the CAO/Transfer RPA" (Step 3) we realize a Pay500 transaction will only be generated if the payroll offices are different but will users be able to actually see the PAY500 transaction? | A Pay500 generated at the Gaining region will only be viewable by the Gaining region users.  A Pay500 generated at the Losing region (Gaining/Losing payroll offices are different) will be viewable only to Losing region users |

| (10) Under "CAO/Transfer Separation Process (Losing Region)" (Step 4) what is the meaning of the word "update" in the first sentence of this step? | Update means a user has Updated HR and the action has consummated in the DCPDS database. This step occurs only after the action has consummated. If the RPA is pending, the Separation data will not be generated until the RPA is processed in DCPDS <br><br> Module 4, Chap 11, page 24 |
| --- | --- |
| (11) Can a CAO/Transfer request form be corrected if information was input incorrectly? | **No**. After a CAO/Transfer request has been initiated it cannot be corrected. If it is determined that a data element was input incorrectly, you must cancel the CAO/Transfer request and re-input it with the correct information. The request can be re-initiated immediately after receiving the cancellation confirmation message. |
| (12) When would a CAO/Transfer Request be processed against the same region data base (i.e., both SOID's on the same region box)? | A CAO/Transfer Request is not mandatory when processing an action on a single data base but may be required for one of two reasons. The first reason the CAO/Transfer request would be required is if the region assigns a "Secure View" (i.e., NGB employee transferring between states). The second reason would be moving an employee from one agency to another where the same region data base services both agency "cross-serviced" records (i.e., DeCA employee serviced by Army Region accepts a position in Army serviced by the same region). |
| (13) Is a Pay500 transaction created for every CAO/Transfer Interagency RPA action generated? | **Yes and No**. <br> **Yes** at the Gaining region - a Pay500 is generated for every action processed at the Gaining region (e.g. T1XX, T5XX, T7XX). <br> **No** at the Losing region - a Pay500 is only created if the Gaining/Losing payroll offices are different. If both payroll offices are the same, a Pay500 <u>is not</u> generated. |
| (14) Do I have to cancel the CAO Request if the NOA or the Effective Date changes? | **No.** The new process uses the NOA or Effective Date entered on the RPA to update the database and create the Pay500/Separation RPA. Caution should be used if the CAO or Transfer action is delayed beyond a pay period as the information retrieved may no longer be the most current information available. Processing time for the new CAO process has been greatly decreased and it may be feasible to cancel and re-initiate the request to insure the most current information is available. |

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(15) Shouldn't the FEGLI and Retirement Code auto-populate on the CAO/Transfer RPA?

**No**. DCPDS does not auto-populate the FEGLI or Retirement code in the CAO/Transfer process because the CAO/Transfer action might afford the employee a different eligibility. The staffing specialist must make a determination based on the RPA action (i.e., a temporary employee converted to a permanent appointment) and enter the appropriate value in these two fields

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