



5060 / AUX-SOP-009(A)  
05 May 2022

## MEMORANDUM

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Reply to: CG-BSX-11  
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To: Distribution

Subj: AUXDATA II ACCOUNT ACTIVATION AND DEACTIVATION STANDARD  
OPERATING PROCEDURES

Ref: (a) Auxiliary Manual, COMDTINST M16790.1 (series)

1. PURPOSE. To establish Standard Operating Procedures (SOP) that address when, why, and how account creation and deactivation in the Coast Guard's Auxiliary information system of record, AUXDATA II, are to be accomplished.
2. ACTION. All AUXDATA II account creation and deactivation authorities, specifically the Auxiliary Division (CG-BSX-1) and District Directors of Auxiliary (DIRAUX), shall adhere to this SOP.
3. DIRECTIVES AFFECTED. None.
4. BACKGROUND. In April 2020, AUXDATA II was brought online to serve as the Coast Guard's Auxiliary information system of record. Two types of AUXDATA II accounts were made available: Auxiliary accounts (i.e., accounts for Auxiliarists) and Internal User accounts (i.e., accounts for personnel in District Director of Auxiliary (DIRAUX) offices, the Office of Auxiliary and Boating Safety (CG-BSX), the Finance Center (FINCEN), and Order Issuing Authorities (OIA) who need AUXDATA II access). Both accounts may be created and deactivated by DIRAUX staff or the system's Salesforce software manufacturer. To maximize account security and standardize account creation and deactivation procedures, SOP establishment was warranted.
5. DISCLAIMER. This SOP is not a substitute for applicable legal requirements, nor is it itself a rule. It is intended to provide guidance for Auxiliary personnel and is not intended to nor does it impose legally binding requirements on any party outside the Coast Guard.
6. MAJOR CHANGES. None.

7. DISTRIBUTION. No paper distribution will be made of this SOP. An electronic version will be located on the CG-BSX web site: <http://agroup-bx.wow.uscgaux.info/content.php?unit=BX-GROUP&category=sop>
8. FORMS/REPORTS. Forms that may be associated with this SOP will be available on the Coast Guard Auxiliary webpage at the following link: <https://forms.cgaux.org/forms1.php>
9. REQUEST FOR CHANGES. Units and individuals may formally recommend changes via their chain of leadership and management. Relevant portions of this SOP shall be incorporated in the next change to reference (a).

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Enclosure: (1) AUXDATA II Account Creation and Deactivation SOP

Dist: DIRAUX, C5ISC, NEXCOM, ANACO-IT, DIR-C, DIR-U, Salesforce

**AUXDATA II**  
**Account Activation and Deactivation**  
**Standard Operating Procedures**

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1. Auxiliary Account Creation. Upon enrollment of an Auxiliarist, an Auxiliary account shall be created for them in the AUXDATA II system.
  - a. The DIRAUX shall search the Auxiliarist's full name in AUXDATA II to ensure they have not been previously enrolled in the Auxiliary.
  - b. If an account already exists, the DIRAUX shall reactivate that account and populate with any updated information for the Auxiliarist. If no account exists in AUXDATA II, a new Auxiliary account will be created for them.
2. Auxiliary Account Creation Process. The following process shall be used to create a new Auxiliary account:
  - a. Navigate to the Members tab and click on "New". Record type to be used is "Auxiliary Member". Member status will be "AP". Member Status Date will be the date of entry. Type in the Auxiliarist's full name. Unit Name will be the District/Division/Flotilla (example: 1131201 would be for District 113, Division 12, and Flotilla 01). Further data fields on this page must be completed by the DIRAUX based on information provided in the Auxiliarist's enrollment form. National Mail, District Mail, Division Mail, and Flotilla Mail options must be checked. Once completed, click "Save". At this point the new Auxiliarist's AUXDATA II account will have been created.
  - b. Navigate to the Auxiliarist's Related tab and click on "Investigation History". Navigate to "New" and then click on the drop down status for "OS" and change to "Favorable". Input the date of the completed favorable Operational Support Personnel Security Investigation (OS PSI) for the entry date. Other fields in this "Investigation History" tab will be completed if a member requires an Auxiliary Logical Access Card (ALAC) or needs an SF-86 completed for any other program participation in which a higher background check is required.
  - c. Navigate back to the Member Record page. Click on the dropdown arrow beside "Clone" and click "Enable Partner User". Under "New User", ensure the First Name field is filled with their first name and Middle Initial, and ensure the Auxiliarist's User Name field is replaced with their member number@uscg.aux. Enter the Auxiliarist's primary email address (i.e., provided on the enrollment form) in the email address box. The profile dropdown field must be changed to "Auxiliary Member". Ensure the correct time zone is entered for the appropriate district, and click "Save".
  - d. Once on the User Detail page, click on "Contact" and the Auxiliarist's name. On the Member's Record page, ensure the "Internal User ID" field has the Auxiliarist's name entered in that field. Navigate to the "Skills and Availability" tab and enter in appropriate data as needed.
3. Auxiliary Account Deactivation. An Auxiliary account shall be deactivated in the AUXDATA II system for the following reasons:

- a. If a DIRAUX receives a Change of Membership Status Form (ANSC 7035) that is signed by an Auxiliarist's Flotilla Commander and District Staff Officer-Human Resources that reflects an Auxiliarist's Retirement, Death, Member Request, or Failure to Pay Dues.
  - b. If an Auxiliarist's annual background check is completed through USCG COASTWATCH and contains reliable and significant disqualifying or adverse information that cannot be mitigated, and which leads the Auxiliarist to be found unsuitable for membership.
  - c. If an Auxiliarist is subject to a personnel investigation and the DIRAUX determines that the Auxiliarist is to be disenrolled due to the circumstances of the investigation, or is disenrolled for any other reason.
4. Auxiliary Account Deactivation Process. The following process shall be used to deactivate an Auxiliary account:
- a. On the AUXDATA II home page, type in the Auxiliarist's name or member ID number in the search bar and click "Enter". Once on the desired Member Record page, click on the dropdown menu for Member Status and change to desired disenrollment status. Change Member Status Date to the date this entry is being made in the system and then click "Save".
  - b. Once this is completed, verify that the unit name has changed to Archive, the unit number has changed to 99999999, and the box for "Archive" has been checked.
  - c. If an Auxiliarist is being separated for Disenrollment Security (DSEC) or Disenrollment Administrative (DADM) reasons, the DIRAUX shall write a brief comment in the DIRAUX comments block on the Member Record page to indicate to other DIRAUX offices why they were disenrolled, which will help prevent potential re-enrollment in a different region.
5. Internal User Account Creation. This account is not to be created for an Auxiliarist. A new Internal User account may be created in the AUXDATA II system for the following reasons:
- a. If a DIRAUX is made aware that a new Internal User account is needed to support their region. Once provided with required information (Name, Rank, Duty Station, Telephone Number, and Unit Address), an Internal User account may be created in AUXDATA II.
  - b. If CG-BSX-11 is made aware that a new Internal User account is needed for non-district personnel. The Salesforce software developer shall be contacted and provided the required information (Name, Rank, Duty Station, Telephone Number, and Unit Address), upon which an Internal User account may be created in AUXDATA II.

6. Internal User Account Creation Process. The following process shall be used to create a new Internal User account:
  - a. On the AUXDATA II home page, click in the search bar and search for the desired Auxiliarist's name. If the Auxiliarist already has an account, click on the Auxiliarist and proceed to step 6.b. If no Auxiliarist appears, click on the Members tab, then click "New". Once the new Member Account page displays, click on "Internal User" and then click "Next". On the New Internal User page, fill in the information to include full name, Auxiliarist's unit name (type in "INTERNAL" for this option), district, email address, and phone number. Then click "Save" (Note: do not check the box for "OIA" or "DIRAUX" at this time).
  - b. On the Member Record page, click on the down arrow next to the "Clone" button and click on "Enable Partner User".
  - c. On the Setup User page, enter the Auxiliarist's email address. Once that is complete, click in the "User Name" box and it should autofill with the email address just entered. The "Nickname" box should autofill with the Auxiliarist's user name. Then fill in "Title", "Company", "Department", and "Division", as applicable.
  - d. The "Role" and "User License" fields should auto-populate on the Setup User page. Next, click on the dropdown menu for "Profile" and select the category as needed. Available options are "DIRAUX Community", "FINCEN Community", "OIA", and "Partner Community" User Login.
  - e. Next, check to ensure accuracy of the pre-populated Mailing Address section and Locale Settings, make any changes that might be necessary, and then click "Save". Once saved, it will complete the application of all information entered and return back to the User Detail subsection of the Setup User page. Next, click on the Auxiliarist's name in the "Contact" field. This will navigate to the Member Record page.
  - f. Once on the Member Record page, if "DIRAUX Community" or "Partner Community" User Login was selected in step 6.d., then click on the pencil icon in the DIRAUX field, check the DIRAUX box, and then click "Save". If "OIA" was checked in step 6.d., then click on the pencil icon in the "OIA" field, check the "OIA" box, and then click "Save".
  - g. Navigate to the Related tab and click on the "Member's Location" field under the Related List Quick Links tab. On the Member's Location page, click on "New" and a new "Member Location" box will appear. If "DIRAUX Community" or "Partner Community" User Login was selected in step 6.d., then click on the "DIRAUX Member District" option and then click "Next". If "OIA" was checked in step 6.d., then click on the "OIA Member District" option and click "Next".

