



US COAST GUARD AUXILIARY Information Technology User Support & Services IS OFFICER GUIDE: MEMBER OFFICE UPDATE PROCEDURE in AUXDATA II

IMPORTANT:

1. Check with your District to see if the Officers updates are done by the DSO, SO or FSO's. Some Districts only allow the DSO, ADSO or SO- IS to update Officer Positions. Please follow your District policy.
2. If you are updating the Offices Manually AND if the member holding the office in the current year is the same for the next year no entry is necessary unless District policy indicates otherwise. You do need to verify that the member is still qualified to hold office (Core Training is current) and removed the person from office or notify the appointing authority (FC, DCDR, COMO) of the issue.
3. When a new officer is assigned to a position the outgoing officer will automatically have an "Officer End Date" one day previous to the new officer start date and the Active Status will be changed to "Inactive".
4. When entering an office that has changed, enter 01/01/2023 for the Officer Start date. Do NOT enter the Officer End Date.
5. **DO NOT** enter Officers for the coming year until close to Jan 1 of that year.
6. AUXDATA II has a validation regarding elected officers serving as Finance or Materials Officers. If your FN or MA officer has been elected to a leadership position you must remove them from that staff position before entering the elected position. Please follow your Chain of Leadership if you have any questions or concerns regarding this policy.
7. If updating an IS Officer, be aware that the IS Permissions will be removed from the member once the member is removed from an IS Position. If the member holds an IS position at a different unit level, they need to reapply for the permissions. This is a bug that may be fixed by December 2022.

PROCEDURES FOR UPDATING OFFICER RECORDS

There are three methods for updating member offices: File Upload done by National, Manual Officer Change starting at the Unit Record and Manual Officer Change starting at the Member Record. There are advantages to each approach. The approach you choose should be discussed with your DSO.

A. Annual File Upload

This approach is used at the start of the new year. You will receive a notice from your DSO-IS with an Excel Spreadsheet for your unit and a deadline for submission. You must complete the spreadsheet and submit it back to the DSO-IS or a designated ADSO-IS by the deadline. The District Officer coordinating the effort will compile a single spreadsheet for all units of the District and will submit that to National for upload.

The spreadsheet must be "complete" (every field filled in) even if you don't have officer assignments from a Flotilla yet. If no officer assignment is received in time, the member name in the spreadsheet should be filled with "Office Vacant". After the upload you can go in and manually update the field to indicate the correct staff office. The File Upload procedure is "All or

Nothing”. Either ALL units participate or they all have to be done manually.

The upload process will “end date” the term of office for each office holder even if the officer holder is not changing year to year. They will, essentially be reappointed with an effective date of Jan 1.

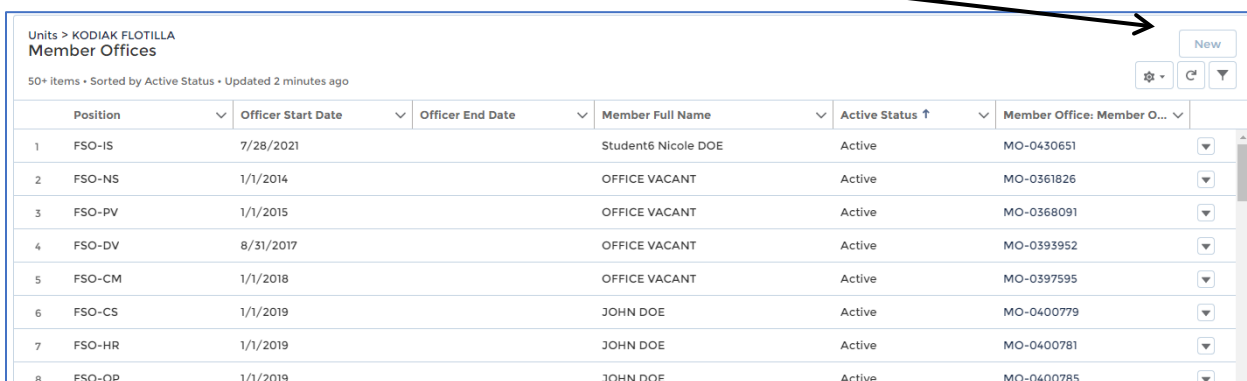
B. Manual Entry

Manual entry can be used instead of the file upload to update officers for a new year or during the year when an officer changes.

Updating an office Manually can start at either the UNIT record or the MEMBER Record

Start at UNIT Record:

- From the HOME screen, click on the **UNIT** page
- Use the Search Field at the top right of the screen to locate the Unit you are updating
- Click on the Unit Name to open the record
- Click **View ALL** on the Officer Listing
- Click **NEW** to begin to update this list



	Position	Officer Start Date	Officer End Date	Member Full Name	Active Status	Member Office: Member O...
1	FSO-IS	7/28/2021		Student6 Nicole DOE	Active	MO-0430651
2	FSO-NS	1/1/2014		OFFICE VACANT	Active	MO-0361826
3	FSO-PV	1/1/2015		OFFICE VACANT	Active	MO-0368091
4	FSO-DV	8/31/2017		OFFICE VACANT	Active	MO-0393952
5	FSO-CM	1/1/2018		OFFICE VACANT	Active	MO-0397595
6	FSO-CS	1/1/2019		JOHN DOE	Active	MO-0400779
7	FSO-HR	1/1/2019		JOHN DOE	Active	MO-0400781
8	FSO-OP	1/1/2019		JOHN DOE	Active	MO-0400785

VERY IMPORTANT: Always click “NEW”. Do not click on the office record number and make change the officer in that record. Such action will corrupt the office record.

- Clicking NEW will bring up an entry screen where you enter the information for the new office holder. If doing this in the UNIT Object, the unit field will be filled automatically.

Start at the MEMBER Record:

- From the Home Screen click on **MEMBER** Page
- Use the Search field at the top of the page to find the Member who will be filling the position.
- Open the Member Record by clicking on the Member Name and click on the **Related Tab**. Scroll Down until you find the Member Offices section.

- Click on **NEW**



- Clicking NEW will bring up an entry screen where you enter the information for the new office holder. If doing this in the MEMBER Object, the Member Name field will be filled automatically.

Office Update Screen

The following screen shots are from the Member Object but the screens at the Unit Object are the same

From the New Member Office Screen:

 A screenshot of the 'New Member Office' form. The title is 'New Member Office'. The form is divided into several sections:

- Information**:
 - Member Office Record Number: (empty text field)
 - * Unit: A dropdown menu with 'BUZZARDS BAY DIV' selected.
 - * Member: A dropdown menu with a redacted name.
 - * Active Status: A dropdown menu with 'Active' selected.
 - Unit Level: A dropdown menu with '--None--' selected.
 - Position: A dropdown menu with '--None--' selected.
 - Position Short Title: (empty text field)
 - Reports To: (empty text field)
 - Office Sub Code: (empty text field with an information icon)
 - Office Sub Code Description: (empty text field)
 - * Officer Start Date: (calendar icon)
 - Officer End Date: (calendar icon)
- System Information**:
 - Test Data: (checkbox, currently unchecked)

 At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

- Unit: Search and select Unit name. For a District, spell out the name (e.g. Fifth...) the unit should appear for selection after a few keystrokes. If starting at the UNIT object, the Unit will be automatically populated.

- Member Field: Search and Select a Member Name. Searching on Member ID is the easiest approach to ensure the correct member is selected. If starting in the MEMBER object, the name is automatically populated.
- Active Status: "Active" is the default- do not change this.
- Unit Level: Scroll to and select District, Division or Flotilla as appropriate.
- Position: Scroll to and select the position being activated for the member. Note that this field is not searchable.
- Office_Subcd and Office_Subcd Desc: Disregard these fields if entering Division or Flotilla Level positions. See further on in this document for more information on entry of District positions.
- Officer Start Date: Enter Jan 1 of the new year or the date the member is assuming the office. Note that the record will not save if a start date is not entered. Do not enter an "End Date"
- Click Save. The office is now active for the incoming member, and the position is automatically set to inactive for the member being removed/resigned.

Updating an Office to VACANT

- If starting at the UNIT Record, Click NEW in the Office listing search and select Member named "Office Vacant" to enter into the Member field in the New Member Office Screen
- If starting at the MEMBER Record, Search for "Office Vacant" in the Member Object. And open the "Office Vacant" Member record. Go to the Related Tab and click NEW in the Office Table then complete the new member office screen.

DISTRICT OFFICE ENTRY

Only the District can have offices of the same name (e.g. multiple ADSO positions). The Member Office Sub-codes are the key to updating ADSO, DCAPT and SLO Office holders. Member Office Sub Codes are used to enter 2 or more members in the same member office position without the automatic deactivation of the prior officeholder. This works as follows:

- a. When a Member Office record is created and the Office Sub Code is not the same as a prior office record, the prior office WILL NOT be deactivated.
- b. When a Member Office record is created with the exact same Unit Level, Position, and Sub Code, any prior member office record WILL BE deactivated as the Officer End Date is populated.
- c. When a Sub Code is the same except for the use of different text cases, this is a match and the deactivation will occur.
- d. Sub Code field values must match all characters (except case) for the prior office to be deactivated. For example the codes ACC/BCN and ACC BCN would NOT be a match and no deactivation would occur.

Before beginning, have a list of all office holders with Office Code and Office Sub-code correctly identified (spelling, spaces and hyphens) as found in AUXDATA II.

From the **New Member Office Screen**:

- Unit: Search and select Unit name. For a District, spell out the name (e.g. Fifth...) the unit should appear for selection after a few keystrokes. If starting at the UNIT object, the Unit will be automatically populated.
- Member Field: Search and Select a Member Name. Searching on Member ID is the easiest approach to ensure the correct member is selected. If starting in the MEMBER object, the name is automatically populated.
- Active Status: "Active" is the default- do not change this.
- Unit Level: Scroll to and select District, Division or Flotilla as appropriate.
- Position: Scroll to and select the position being activated for the member. Note that this field is not searchable.
- **Type in the Office Sub code EXACTLY as spelled in the verified list. Only an exact match will allow the automation to remove the current member to work.**
- Officer Start Date: Enter Jan 1 of the new year or the date the member is assuming the office. Note that the record will not save if a start date is not entered.
- Click Save. The office is now active for the incoming member, and the position is automatically set to inactive for the member being removed/resigned.

IF YOU HAVE ANY QUESTIONS CONTACT YOUR DSO-IS FOR ASSISTANCE

