U.S. Department of Homeland Security
United States Coast Guard

COMMANDING OFFICER
U. S. COAST GUARD
PERSONNEL SERVICE CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: P&D
Phone: 785 339-2214

PSCNOTE 1000
04 October 2004

CANCELLED:
03 October 2005

PERSONNEL SERVICE CENTER NOTICE 1000

Subj: CH-10 TO PSCINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose

This notice publishes changes to PSCINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. Action

Addressees shall enter page changes as indicated in the Procedure section of this Notice. No paper distribution will be made of this Notice. Official distribution will be via the Coast Guard Personnel Service Center's web site: http://www.uscg.mil/hq/psc/3pm.htm.

The PPPM will be reprinted, with all changes, in November 2004. See Paragraph 7 of this Notice for ordering procedures.

3. Directives Affected

PSCNOTE 5000, BAH, Dependency and Emergency Data Forms and Reports, of 24 October 2003 is cancelled. Its contents have been incorporated into Chapter 5 of the PPPM.

PSCINST M5231.2, Source Data Automation II User Manual is cancelled. The Direct-Access online manual is the official reference for reporting personnel events and transactions.

4. Summary of Changes

A side bar in the margin marks the significant changes. Significant changes are summarized as follows.

Continued on next page

DISTRIBUTION - SDL No. 141 (Note: This notice distributed electronically only, see paragraph 7 for ordering reprints)

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
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*NON-STANDARD DISTRIBUTION:

4. Summary of Changes (cont'd)

Chapter 1, Title updated to *Personnel and Pay Systems Overview*.
Chapter 1, Page 1-2 thru 1-3; Updated responsibilities.
Chapter 1, Page 1-8 thru 1-11; Added procedures for Authorizing Direct-Access Command Users
Chapter 1, Page 1-12 thru 1-13; Added procedures for Designating Direct-Access SPO and SPO Supervisor Users.
Chapter 1, Page 1-14; Added new section, HRS Role User Designation Criteria.
Chapter 2 - A, Page 2-A-2; Updated PCS transfer process to reflect new Direct-Access procedures.
Chapter 2 - A, Page 2-A-3; Added, Employee Review to Step 9 of the PCS Departing Checklist.
Chapter 2 - A, Page 2-A-5; Updated PCS Reporting Checklist to reflect new Direct-Access procedures.
Chapter 2 - A, Page 2-A-7; Changed the auto stop for BAH w/o Depns to "Stops on the day prior to reporting" vice the day prior to departure.
Chapter 2 - A, Page 2-A-8; Clarified the auto stop description for OCOLA, Dive Pay and OHA.
Chapter 2 - B, Page 2-B-9; Added PSC customer care contact number and email address.
Chapter 2 - B, Page 2-B-11 thru 2-B-12; Updated Signature Proxy and Approving Official information.
Chapter 2 - B, Page 2-B-14; Added a Resources row to the Support Services table.
Chapter 2 - B, Page 2-B-17 thru 2-B-19; Updated travel claim audit procedures and guidelines.
Chapter 2 - B, Page 2-B-20; Removed FAX Transmittal of Travel Claims section and replaced with, FAX of PCS Advance Requests and condensed the procedures.
Chapter 2 - B, Page 2-B-22; Added statement that Blanket Travel Orders cannot cross FYs.
Chapter 2 - B, Page 2-B-23; Added statement that travel claims are not required for Group Travel Orders.
Chapter 2 - B, Page 2-B-24 thru 2-B-25; Renamed section to Leave and Liberty Combined With TDY Travel. Updated Rationale statement.
Chapter 2 - B, Page 2-B-29; Updated CG-4251 block 12 requirements.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 2 - B, Page 2-B-31; Letter Travel Orders sample updated to reflect new CG Memo.
Chapter 2 - B, Page 2-B-40; Added statement to include original airfare, or commercial travel, receipts with travel claim.
Chapter 2 - C, Page 2-C-2 thru 2-C-4; Updated ADT Process
Chapter 2 - C, Page 2-C-6 thru 2-C-7; Updated Preparation of Annual Screening Questionnaire.
Chapter 2 - D, Page 2-D-6 thru 2-D-8; Updated ADSW-AC Order processing.
Chapter 3 - A, Page 3-A-1; Deleted Recalled RET-2 topic.
Chapter 3 - A, Page 3-A-2 thru 3-A-3; Updated member process requirements for accession.
Chapter 3 - A, Page 3-A-4; Updated prior service accession description.
Chapter 3 - A, Page 3-A-5; Updated recalled retired members payment method.
Chapter 3 - B, Page 3-B-2; Updated intro to indicate TONOs are auto generated upon completion of the separation orders. Request to change the termination date must be submitted to CGPC (epm-1 or opm-1)
Chapter 3 - B, Page 3-B-3; Updated to indicate an SOI must be submitted 60 prior to separation or departure on terminal leave.
Chapter 3 - B, Pages 3-B-5 thru 3-B-8; Updated immediate and priority separation processing procedures. Notable change: CGPC (epm-1or opm-1) now assigns termination dates.
Chapter 3 - B, Page3-B-10 thru 3-B-11; Updated routine separation processing procedures.
Chapter 3 - B, Exhibit 2-B-2; Deleted example of Requesting A Document Number and Accounting Data.
Chapter 3 - B, Page 3-B-17 thru 3-B-19; Updated separation checklist to reflect Direct-Access procedures.
Chapter 3 - C, Page 3-C-9; Updated reserve RELAD procedures and reserve integration process to reflect new Direct-Access procedures.
Chapter 3, Page 3-B-14; Updated Enlisted to Cadet processing procedures.
Chapter 4 - B, Page 4-B-2 thru 4-B-4; Warrant Officer Appointment Processes and Checklists updated.
Chapter 4 - C, Page 4-C-2; Updated Training and Educational Accomplishments to reflect Direct-Access procedures.
Chapter 4 - C, Page 4-C-6; Deleted requirement to complete an allotment stop for VEAP refunds.
Chapter 4 - C, Page 4-C-7; Updated amount of MGIB Benefits.
Chapter 5 - A; Renamed section to Designation of Beneficiaries and Emergency Data.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 5 - A, Page 5-A-2 thru 5-A-3; Added new procedures to designate beneficiaries and emergency contacts. CG-4170A is obsolete, replaced with Direct-Access and CG PSC-2020D, Designation of Beneficiaries form.
Chapter 5 - A, Page 5-A-5; Updated the address for the Office of VGLI.
Chapter 5 - A, Page 5-A-6; Updated SGLI payment process.
Chapter 5 - A, Page 5-A-7; Tightened the wording of opening paragraph of "Procedures for electing coverage of previously declines SGLI". Added "SGLI is increased or restored effective the date the USCG receives the form".
Chapter 5 - A, Page 5-A-8; Updated "Designating the Beneficiary" to reflect member's rights and authorities.
Chapter 5 - A, Page 5-A-9 thur 5-A-11 ; Updated and clarified the rules for Designating Principal Beneficiaries and the Contingent Beneficiaries. Added section "Changing a Beneficiary and Accepting the SGLV-8286 from the member". Clarified SGLI Family Member Eligibility requirements.
Chapter 5 - A, Page 5-A-13; Added "child SGLI coverage cannot be cancelled". Removed SGLI Family Member cost chart and added a hyperlink the G-WPM website.
Chapter 5 - A, Page 5-A-13; Updated spousal coverage when electing to reduce or decline coverage.
Chapter 5 - A, Page 5-A-14; Updated OSGLI address on the spousal SGLI cancellation letter.
Chapter 5 - B, Page 5-B-1; Added new BAH/Dependency Data Form section to the overview and updated page numbers.
Chapter 5 - B, Page 5-B-3; Updated verification and forms to reflect Direct-Access processes.
Chapter 5 - B, Page 5-B-4 thru 5-B-5; Added BAH/Dependency Data Form section.
Chapter 5 - B, Page 5-B-14; Added statement that the Reserve Family Member ID Card has no authorization for access to military benefits unless accompanied by a set of valid active duty orders or pay voucher.
Chapter 5 - C, Page 5-C-1; Updated overview to reflect new Direct-Access forms and procedures.
Chapter 5 - C, Page 5-C-2 thru 5-C-4; Removed section on CG-4170 and replaced with Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts.
Chapter 5 - C, Page 5-C-5; Removed requirement to request SOCS for "any prior military service" personnel.
Chapter 5 - C, Page 5-C-8; Deleted provision that units will receive PDIFs quarterly.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 5 - D, Page 5-D-1; Added E-Resume and TRICARE Selected Reserve Dental Program to the section overview.
Chapter 5 - D, Page 5-D-3; Updated Preparation of CG-2519 forms to reflect Adobe Forms.
Chapter 5 - D, Page 5-D-4 thru 5-D-5; Condensed procedures for carrying over leave in excess of 60 days.
Chapter 5 - D, Page 5-D-13; Replaced E-Assignment Data Card (E-ADC) with E-Resume.
Chapter 5 - D, Page 5-D-17 thru 5-D-18; Requests for changes to name, SSN, DOB or minority designator no longer go to PSC and are now approved at the unit level and input by the SPO.
Chapter 5 - D, Page 5-D-19 thru 5-D-20; Added TRICARE Selected Reserve Dental Program.
Chapter 6 - A, Page 6-A-3; Added "An abbreviated LES is available for members by using the Direct-Access self-service module".
Chapter 6 - B, Page 6-B-3; Condensed the description for Criteria for Special Payments Due to Nonreceipt of Pay.
Chapter 6 - B, Page 6-B-4; Added new section titled "How special payments are liquidated & posted on the LES.
Chapter 6 - B, Page 6-B-7 thru 6-B-8; Updated advance payments to reflect BAH vice BAQ.
Chapter 6 - B, Page 6-B-9; Updated Death Gratuity information and procedures.
Chapter 6 - C, Page 6-C-2; Removed U.S. Forces Caribbean from Types of Mobile Units.
Chapter 6 - D, Page 6-D-1; Removed Unit Attendance Record section. Updated section overview and page numbers.
Chapter 6 - D, Page 6-D-2; Updated IDT prerequisites.
Chapter 6 - D, Page 6-D-3; Added new section titled "Compensation".
Chapter 6 - D, Page 6-D-4; Changed reserve orders prep from 2 weeks to 1 month prior to drill dates. Condensed and clarified the IDT process.
Chapter 6 - D, Page 6-D-5 thru 6-D-6; Updated Drill Order rules.
Chapter 6 - D, Page 6-D-7; Updated IDT Drill Order Letter to reflect CG Memo format.
Chapter 6 - D, Page 6-D-8; Added SDAP to Supervisor IDT Endorsement sheet.
Chapter 6 - D, Page 6-D-9; Updated IDT Amendment letter to reflect CG Memo format.
Chapter 6 - D, Page 6-D-10; Terminology updates to the IDT Certification Sheet.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 6 - D, Page 6-D-13; Added "SPO will take action to correct discrepancies on the reserve retirement point statement".
Chapter 6 - D, Page 6-D-16; Changed "Notice of Eligibility" to "Notice of Incapacitation Benefits".
Chapter 7 - A, Page 7-A-1; Changed (HFPAY) to "Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)" and Funeral Duty Pay for reservists to "Funeral Honors Duty Allowance for Reservists.
Chapter 7 - A, Page 7-A-2; Added note regarding officer qualification for ACIP.
Chapter 7 - A, Page 7-A-5; Added reference for amount of HDIP.
Chapter 7 - A, Page 7-A-6 thru 7-A-7; Removed HFPAY and inserted Special Pay –Duty Subject to Hostile Fire or Imminent Danger (HF/ID).
Chapter 7 - A, Page 7-A-9 thru 7-A-10; Added processes and procedure for new HDIP-VBSS.
Chapter 7 - B, Page 7-B-1; Changed topic BAS to "Refund for Missed Meals – Discounted Meal Rate (DMR)".
Chapter 7 - B, Page 7-B-2; Updated references and processes to reflect Direct-Access procedures.
Chapter 7 - B, Page 7-B-3; Updated FSA-R definition.
Chapter 7 - B, Page 7-B-10; Added explanation of who is entitled to the Officer Uniform Allowance and how to they will receive it.
Chapter 7 - C, Page 7-C-2; Updated references and qualifying areas for the savings deposit program.
Chapter 7 - C, Page 7-C-4; Added instruction to forward the allotment worksheet for the savings deposit program to PSC (MAS) vice SPO.
Chapter 7 - D, Page 7-D-3; Updated taxability of CSB Payments section.
Chapter 8 - A, Page 8-A-5; Updated references and nonreceipt of allotment procedures.
Chapter 8 - A, Page 8-A-6; Added new PSC E-mail address.
Chapter 8 - B, Page 8-B-3; Updated changing state of legal residence procedure.
Chapter 8 - B, Page 8-B-11; The dollar amount was increased under Amount of Combat Tax Exclusion to $6,090.90.
Chapter 8 - B, Page 8-B-13; Block 13.Q was dropped from General information regarding the IRS Form W-2. Block 13.Q is no longer included on the W-2 form.
Chapter 8 - B, Page 8-B-14; PSC will reissue W-2 within 7 business days vice 14 days. Removed E-mail example for requesting a corrected W-2.
Chapter 8 - B, Page 8-B-15; Changed option to request changes to FITW or SITW via Rapidraft Letter to Memo.
Chapter 8 - C, Page 8-C-4; Added note to Step 1 of TSP action column.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 8 - C, Page 8-C-6; Added Note to changing TSP contributions.
Chapter 8 - C, Page 8-C-7; Added instructions for TSP Catch-Up Program.
Chapter 9 - A, Page 9-A-2; Added new section "Overpayment collection – Reserves not on active duty".
Chapter 10 - A, Page 10-A-2; Changed references for Administrative Remarks, updated policies and procedures, and changed example entries.
Chapter 10 - A, Page 10-A-5 thru 10-A-8; Updated screen shots. Removed old Evaluation section and replaced with new one.
Chapter 10 – B, Page 10-B-15; Updated to reflect new Direct-Access procedures.
Chapter 11, Page 11-2; Updated to reflect Direct-Access procedures.
Chapter 11, Page 11-12; Added section HDIP-VBSS to pay entitlements when mobilized.
Chapter 11, Page 11-14 thru 11-15; Added HDIP-VBSS to mobilization chart and updated notes.
Chapter 11, Page 11-16; Added info regarding advances on Blanket Orders.
Chapter 11, Page 11-23 thru 11-29; Updated Mobilization checklist and procedures.
Chapter 11, Page 11-32; Updated mobilization of retirees checklist to reflect new Direct-Access Rehire procedure.
Chapter 11, Page 11-33; Deleted section stating reservists are not entitled to Lodging Plus Per Diem for leave days.
Chapter 11, Page 11-44; The Unit Data Report has been deleted as part of Direct-Access release 11.
Chapter 11, Page 11-45 thru 11-53; Updated Extension and Demobilization procedures to reflect new Direct-Access processes. SOI for demobilization must be submitted at least 45 days prior to separation or departure on terminal leave.
Enclosure (1); Added information for accessing form on PSC's web site and CGSWSIII. PSC forms and worksheets are no longer published in this enclosure.
Enclosure 4; Updated to reflect current correspondence standards. Added Reserve Thank You letter.

Continued on next page

4. Summary of Changes (cont'd)

Enclosure 6; Eliminated Advancement and Reduction Administrative Remarks pages 3,4 and 10; information is be stored in the competencies. Eliminated, Performance and Discipline #'s 13-19. IAW ALCOAST 354/02 states that 3307's are no longer required for enlisted evaluations.
Enclosure 7; Updated Casualty Reporting procedures.
Enclosure 8; Establishes the Direct-Access online manual as the official reference for maintaining personnel data.
Appendix B; Removed. ID Card/DD-1172 preparation instructions are published in COMDTINST M5512.1(series).
Appendix F; Renamed appendix to "LES Information". Incorporated new LES sections 'LES Review and Validation", "Leave and Errors on the LES" and "Explanation of Complex Areas on the LES" from the SDA-II User manual

5. Procedure

Remove and insert the following pages.

Remove	Insert
Table of Contents, Pages i thru viii	Table of Contents, Pages i thru viii
Chapter 1, Page 1-1 thru 1-14	Chapter 1, Page 1-1 thru 1-21
Chapter 2 Page 2-1	Chapter 2, Page 2-1
Chapter 2, Page 2-A-1 thru 2-A-10	Chapter 2, Page 2-A-1 thru 2-A-10
Chapter 2, Page 2-B-1 thru 2-B-49	Chapter 2, Page 2-B-1 thru 2-B-45
Chapter 2, Page 2-C-1 thru 2-C-7	Chapter 2, Page 2-C-1 thru 2-C-7
Chapter 2, Page 2-D-1 thru 2-D-7	Chapter 2, Page 2-D-1 thru 2-D-8
Chapter 3, Page 3-A-1 thru 3-A-5	Chapter 3, Page 3-A-1 thru 3-A-5
Chapter 3, Page 3-B-1 thru 3-B-27	Chapter 3, Page 3-B-1 thru 3-B-26
Chapter 3, Page 3-C-1 thru 3-C-10	Chapter 3, Page 3-C-1 thru 3-C-9
Chapter 4, Page 4-A-1 thru 4-A-4	Chapter 4, Page 4-A-1 thru 4-A-4
Chapter 4, Page 4-B-1 thru 4-B-5	Chapter 4, Page 4-B-1 thru 4-B-5
Chapter 4, Page 4-C-1 thru 4-C-12	Chapter 4, Page 4-C-1 thru 4-C-12
Chapter 5, Page 5-A-1 thru 5-A-20	Chapter 5, Page 5-A-1 thru 5-A-16
Chapter 5, Page 5-B-1 thru 5-B-18	Chapter 5, Page 5-B-1 thru 5-B-20
Chapter 5, Page 5-C-1 thru 5-C-9	Chapter 5, Page 5-C-1 thru 5-C-11
Chapter 5, Page 5-D-1 thru 5-D-20	Chapter 5, Page 5-D-1 thru 5-D-20
Chapter 6, Page 6-A-1 thru 6-A-4	Chapter 6, Page 6-A-1 thru 6-A-5
Chapter 6, Page 6-B-1 thru 6-B-10	Chapter 6, Page 6-B-1 thru 6-B-10
Chapter 6, Page 6-C-1 thru 6-C-6	Chapter 6, Page 6-C-1 thru 6-C-6
Chapter 6, Page 6-D-1 thru 6-D-23	Chapter 6, Page 6-D-1 thru 6-D-16

Continued on next page

5. Procedure (cont'd)

Remove	Insert
Chapter 7, Page 7-A-1 thru 7-A-8	Chapter 7, Page 7-A-1 thru 7-A-10
Chapter 7, Page 7-B-1 thru 7-B-10	Chapter 7, Page 7-B-1 thru 7-B-10
Chapter 7, Page 7-C-1 thru 7-C-5	Chapter 7, Page 7-C-1 thru 7-C-5
Chapter 7, Page 7-D-1 thru 7-D-5	Chapter 7, Page 7-D-1 thru 7-D-5
Chapter 8, Page 8-A-1 thru 8-A-6	Chapter 8, Page 8-A-1 thru 8-A-6
Chapter 8, Page 8-B-1 thru 8-B-18	Chapter 8, Page 8-B-1 thru 8-B-16
Chapter 8, Page 8-C-1 thru 8-C-7	Chapter 8, Page 8-C-1 thru 8-C-7
Chapter 9, Page 9-A-1 thru 9-A-9	Chapter 9, Page 9-A-1 thru 9-A-6
Chapter 9, Page 9-B-1 thru 9-B-3	Chapter 9, Page 9-B-1 thru 9-B-3
Chapter 10, Page 10-A-1 thru 10-A-9	Chapter 10, Page 10-A-1 thru 10-A-9
Chapter 10, Page 10-B-1 thru 10-B-14	Chapter 10, Page 10-B-1 thru 10-B-16
Chapter 11, Page 11-1 thru 11-51	Chapter 11, Page 11-1 thru 11-53
Enclosure (1), Page E-1-1 thru E-1-2 and all forms and worksheets	Enclosure (1), Page E-1-1 thru E-1-2
Enclosure (4), Page E-4-1 thru E-4-9	Enclosure (4), Page E-4-1 thru E-4-10
Enclosure (5), Page E-5-1 thru E-5-17	N/A - Vacant
Enclosure (6), Page E-6-1 thru E-6-50	Enclosure (6), Page E-6-1 thru E-6-46
Enclosure (7), Page E-7-1 thru E-7-8	Enclosure (7), Page E-7-1 thru E-7-9
Vacant	Enclosure (8), Page E-8-1 thru E-8-4
Appendix B, Page B-1 and 1 thru 139	N/A - Vacant
Appendix F, Page F-1 thru F-9	Appendix F, Page F-1 thru F-24
Index, Page I-1 thru I-7	Index, Page I-1 thru I-7

6. Forms and Reports

CG PSC forms are available on the internet at http://www.uscg.mil/hq/psc/forms/.

Other forms referenced in this Manual are available in USCG Electronic Forms on SWSIII or on the Internet at http://www.uscg.mil/ccs/cit/cim/forms1/.

Continued on next page

7. Printed Copies

Printed copies of the PPPM (reprint of original including all changes) may be requested from the Personnel Service Center. Requests may be sent or faxed to:

Commanding Officer (P&D)
U. S. Coast Guard Personnel Service Center
444 SE Quincy Street
Topeka, KS 66683-3591
Fax: 785-339-3772
E-Mail: PSC-PRC@hrsic.uscg.mil

Requests for printed copies must be received by PSC (P&D) not later than 1 November 2004. Afloat units will automatically be mailed one copy of the reprint. No request is necessary unless additional copies are desired.

8. Comments and Recommendations

Comments or recommendations may be submitted by returning the comment form in Enclosure (11) of the manual.

/s/
R. A. ROOTH

U.S. Department of Homeland Security
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 339-3695

HRSICNOTE 1000
10 June 2003

CANCELLED:
10 June 2004

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-9 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. Action Addressees shall enter page changes as indicated in the Procedure section of this Notice. The need to promulgate the information contained in this change in a timely manner precludes utilization of traditional, paper-based, distribution methods.

3. Directives Affected None

4. Summary This change adds Chapter 11, Reserve Mobilization. This chapter provides pay and personnel procedures for reserve mobilization and demobilization. This chapter also provides checklists, guides, and information required to complete the tasks associated with reserve mobilization and demobilization.

Continued on next page

DISTRIBUTION - SDL No. 141 (Note: This notice distributed electronically only)

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5. Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages vii and viii	Table Of Contents, Pages vii and viii
N/A	Chapter 11, Pages 11-1 thru 11-51

6. Comments and Recommendations Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of the manual.

/s/
M. P. SULLIVAN
Acting

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Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
ISC Boston	05
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ISC New Orleans	02
ISC St. Louis	03
ISC Cleveland	05
ISC Seattle	06
ISC Honolulu	05
ISC Ketchikan	05
ISC Ketchikan (Juneau-Det)	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10

TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03
COMDT (G-WPM-2).	04

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 339-3695

HRSICNOTE 1000
16 June 2002

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-8 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary A side bar in the margin marks the significant changes. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
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*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 2, Page 2-A-1 thru 2-A-8; Various changes reflecting BAS reform and CGHRMS implementation; Medical Manual, COMDTINST M6000.1B announced implementation of direct mailing of health records from CG Clinic or independent duty Health Services Technician to the receiving medical facility.

Chapter 2, Page 2-B-7 thru 2-B-8; Adds User Identification and Password to "Critical Elements" of the Unit Travel System (UTS) Process.

Chapter 2, Page 2-B-13 thru 2-B-14; Updates process for designation and procedure to designation a UTS AO.

Chapter 2, Page 2-B-29 thru 2-B-32; Changes reflecting BAS reform.

Chapter 2, Page 2-B-37 thru 2-B-40; Changes reflecting BAS reform.

Chapter 2, Page 2-B-44 thru 2-B-49; Renumbered only.

Chapter 3, Pages 3-B-1 thru 3-B-26; Numerous changes to policy reflecting changes implemented by the launch of CGHRMS.

Chapter 3, Pages 3-B-5 and 3-B-7; Ensure members receive Thrift Savings Plan (TSP) Withdrawal package.

Chapter 3, Pages 3-B-20 and 3-B-25; Ensure members receive Thrift Savings Plan (TSP) Withdrawal package.

Chapter 4, Pages 4-C-1 thru 4-C-4; Changes reflect upgrades to CGHRMS in Competencies dimension.

Chapter 4, Page 4-C-11 thru 4-C-12; Changes reflect upgrades to CGHRMS in Competencies dimension.

Chapter 5, Page 5-A-1 thru 5-A-2; Removes direction to notify insurance companies in case of death.

Chapter 5, Pages 5-A-7 thru 5-A-20; Various changes to policy on completion and distribution of SGLV-8285 and SGLV-8286. Addition of section on SGLI Family coverage. Reflects changes to casualty reporting examples in Enclosure 7.

Chapter 5, Pages 5-C-3 thru 5-C-6; Various changes to policy reflecting CGHRMS implementation.

Chapter 5, Page 5-C-9; The memorandum has replaced the rapidraft letter as the standard of communication.

Chapter 5, Pages 5-D-11 thru 5-D-12; Various changes to policy reflecting CGHRMS implementation.

Chapter 6, Page 6-A-1 and 6-A-2; Changes to payment delivery method options. Members should be encouraged to use CGHRMS Self Service to change direct deposit information.

Continued on Next Page

Changes, *continued*

Chapter 6, Page 6-C-1 thru 6-C-6; Mobile units as of October 1, 2001 are authorized Level 1 CSP. Special and advance payments to deployed personnel are no longer necessary as all members are required to utilize direct deposit.

Chapter 7, Page 7-A-5 and 7-A-6; Effective November 17, 1998, Hostile Fire Imminent Danger Pay is not prorated for members separating during a qualifying month. Entitlement is paid for the full month regardless of subsequent separation.

Chapter 7, Page 7-B-1 thru 7-B-2; Replaces procedure for reporting missed meals.

Chapter 7, Page 7-B-7 thru 7-B-8; Changes reflecting BAS reform.

Chapter 7, Page 7-C-1 thru 7-C-2; Includes new areas (Operation Enduring Freedom) eligible for Savings Deposit Program effective 1 January 2002.

Chapter 7, Pages 7-D-1 thru 7-D-5; Various changes to CSB program.

Chapter 8, Pages 8-A-1 thru 8-A-6; Various changes to policy reflecting CGHRMS implementation.

Chapter 8, Pages 8-B-1 thru 8-B-4; Directs those members with access to CGHRMS to update Federal and State Income Tax information in CGHRMS.

Chapter 8, Page 8-B-7 thru 8-B-8; Active Duty members who are residents of Minnesota are now exempt from state taxes while stationed outside the state.

Chapter 8, Page 8-B-11 thru 8-B-12; Raises ceiling amount of taxable military pay exclusion for duty in combat zone. Changes reflecting implementation of CGHRMS.

Chapter 8, Pages 8-C-1 thru 8-C-7; Section on Thrift Savings Plan (TSP).

Chapter 9, Page 9-A-5 thru 9-A-6; UDC will deduct payment for uniforms from member's pay via PMIS/JUMPS input with exception of emergency uniform issuances which are collected via submission of a PAA.

Chapter 10, Pages 10-A-1 thru 10-A-9; Introduces Enlisted Employee Review Worksheet (EERW) in place of Enlisted Performance Evaluation Form (EPEF).

Enclosure 4, Page E-4-1 thru E-4-9; Includes section on Thrift Savings Plan (TSP) in letter to members separating from the Coast Guard; require EMPLID vice Social Security Number on CG correspondence; various changes reflecting CGHRMS implementation; CG standard correspondence is now Memorandum vice Basic Letter.

Enclosure 6, Page E-6-7 thru E-6-8; Changes to names of rates and addition of IT rating to list of rates restricted to members without U.S. citizenship. Changes to names of rates restricted to those members diagnosed as color blind.

Continued on Next Page

Changes, *continued*

Enclosure 6, Page E-6-11 thru E-6-14; Changes to referenced sections of Personnel Manual. A&R-2 on page E-6-14 changed to reflect new policy of indefinite reenlistments for those members with 10 years of service.

Enclosure 6, Page E-6-17 thru E-6-18; Corrects reference to Personnel Manual for CG-3307, Advancement and Reduction (A&R-10).

Enclosure 6, Pages E-6-39 thru E-6-44; Includes requirement for counseling members on Thrift Savings Plan (TSP).

Enclosure 6, Pages E-6-47 thru E-6-50; Includes requirement for counseling members on Thrift Savings Plan (TSP); new entries on SELRES Enlisted Bonus Program.

Enclosure 7, Pages E-7-1 thru E-7-8; Various policy and procedural changes to Casualty Reporting.

Enclosure 8, Pages E-8-1 thru E-8-66; School codes available in CGHRMS.

Enclosure 10, Pages E-10-1 thru E-10-11; Award codes available in CGHRMS.

Appendix C, Page C-43 thru C-44; Note regarding deductible time for leave following TAD periods when career sea pay stops.

Appendix C, Page C-43 thru C-44; Corrects computation of Creditable Sea Duty. Leave taken en route to TAD is not deductible for Sea Pay purposes.

Appendix F, Page F-3 thru F-8; Various changes and additions as a result of BAS reform. Adds contributions to Thrift Savings Plan (TSP) to list of possible DEDUCTIONS in block 27 of the LES.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages i thru vii	Table Of Contents, Pages i thru viii
Chapter 2, Page 2-A-1 thru 2-A-8	Chapter 2, Page 2-A-1 thru 2-A-8
Chapter 2, Page 2-B-1 thru 2-B-2	Chapter 2, Page 2-B-1 thru 2-B-2
Chapter 2, Page 2-B-7 thru 2-B-8	Chapter 2, Page 2-B-7 thru 2-B-8
Chapter 2, Page 2-B-13 thru 2-B-14	Chapter 2, Page 2-B-13 thru 2-B-14
Chapter 2, Pages 2-B-29 thru 2-B-32	Chapter 2, Pages 2-B-29 thru 2-B-32
Chapter 2, Pages 2-B-37 thru 2-B-40	Chapter 2, Pages 2-B-37 thru 2-B-40
Chapter 2, Pages 2-B-43 thru 2-B-50	Chapter 2, Pages 2-B-43 thru 2-B-49
Chapter 3, Page 3-B-1 thru 3-B-2	Chapter 3, Page 3-B-1 thru 3-B-2
Chapter 3, Pages 3-B-5 thru 3-B-26	Chapter 3, Pages 3-B-5 thru 3-B-26
Chapter 4, Pages 4-C-1 thru 4-C-4	Chapter 4, Pages 4-C-1 thru 4-C-4
Chapter 4, Page 4-C-11 thru 4-C-12	Chapter 4, Page 4-C-11 thru 4-C-12
Chapter 5, Page 5-A-1 thru 5-A-18	Chapter 5, Page 5-A-1 thru 5-A-20
Chapter 5, Pages 5-B-5 thru 5-B-8	Chapter 5, Pages 5-B-5 thru 5-B-8
Chapter 5, Pages 5-C-3 thru 5-C-6	Chapter 5, Pages 5-C-3 thru 5-C-6
Chapter 5, Page 5-C-9	Chapter 5, Page 5-C-9
Chapter 5, Page 5-D-11 thru 5-D-12	Chapter 5, Page 5-D-11 thru 5-D-12
Chapter 6, Page 6-A-1 thru 6-A-2	Chapter 6, Page 6-A-1 thru 6-A-2
Chapter 6, Pages 6-B-3 thru 6-B-6	Chapter 6, Pages 6-B-3 thru 6-B-6
Chapter 6, Pages 6-C-1 thru 6-C-10	Chapter 6, Pages 6-C-1 thru 6-C-6
Chapter 7, Page 7-A-5 thru 7-A-6	Chapter 7, Page 7-A-5 thru 7-A-6
Chapter 7, Page 7-B-1 thru 7-B-2	Chapter 7, Page 7-B-1 thru 7-B-2
Chapter 7, Page 7-B-7 thru 7-B-8	Chapter 7, Page 7-B-7 thru 7-B-8
Chapter 7, Page 7-C-1 thru 7-C-2	Chapter 7, Page 7-C-1 thru 7-C-2
Chapter 7, Pages 7-D-1 thru 7-D-5	Chapter 7, Pages 7-D-1 thru 7-D-5
Chapter 8, Page 8-1	Chapter 8, Page 8-1
Chapter 8, Pages 8-A-1 thru 8-A-5	Chapter 8, Pages 8-A-1 thru 8-A-6
Chapter 8, Pages 8-B-1 thru 8-B-4	Chapter 8, Pages 8-B-1 thru 8-B-4
Chapter 8, Page 8-B-7 thru 8-B-8	Chapter 8, Page 8-B-7 thru 8-B-8
Chapter 8, Page 8-B-11 thru 8-B-12	Chapter 8, Page 8-B-11 thru 8-B-12
	Chapter 8, Pages 8-C-1 thru 8-C-7
Chapter 9, Page 9-A-5 thru 9-A-6	Chapter 9, Page 9-A-5 thru 9-A-6
Chapter 10, Pages 10-A-1 thru 10-A-10	Chapter 10, Pages 10-A-1 thru 10-A-9
Enclosure 1, Page E-1-1 thru E-1-2	Enclosure 1, Page E-1-1 thru E-1-2
	Enclosure 1, CG-3788A
	Enclosure 1, CG-3788B
	Enclosure 1, CG-3788C
Enclosure 1, CG-4251	Enclosure 1, CG-4251
Enclosure 1, CG-5489B	Enclosure 1, CG-5489B
Enclosure 1, CG HRSIC-1900	Enclosure 1, CG HRSIC-1900
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
Enclosure 1, CG HRSIC-2001	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2010	Enclosure 1, CG HRSIC-2010

Continued on Next Page

Procedure, *continued*

Remove and insert the following pages.

Enclosure 1, CG HRSIC-2015	Enclosure 1, CG HRSIC-2015
Enclosure 1, CG HRSIC-2020	Enclosure 1, CG HRSIC-2020
Enclosure 1, CG HRSIC-2020A	Enclosure 1, CG HRSIC-2020A
Enclosure 1, CG HRSIC-2030	Enclosure 1, CG HRSIC-2030
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2055A	Enclosure 1, CG HRSIC-2055A
Enclosure 1, CG HRSIC-2075	Enclosure 1, CG HRSIC-2075
Enclosure 1, CG HRSIC-2426	Enclosure 1, CG HRSIC-2426
Enclosure 1, CG HRSIC-3799R	Enclosure 1, CG HRSIC-3799R
Enclosure 1, CG HRSIC-5100	Enclosure 1, CG HRSIC-5100
Enclosure 1, CG HRSIC-7421	Enclosure 1, CG HRSIC-7421
Enclosure 4, Page E-4-1 thru E-4-2	Enclosure 4, Page E-4-1 thru E-4-2
Enclosure 4, Pages E-4-5 thru E-4-8	Enclosure 4, Pages E-4-5 thru E-4-9
Enclosure 6, Page E-6-7 thru E-6-8	Enclosure 6, Page E-6-7 thru E-6-8
Enclosure 6, Pages E-6-11 thru E-6-14	Enclosure 6, Page E-6-11 thru E-6-14
Enclosure 6, Page E-6-17 thru E-6-18	Enclosure 6, Page E-6-17 thru E-6-18
Enclosure 6, Pages E-6-39 thru E-6-44	Enclosure 6, Pages E-6-39 thru E-6-44
Enclosure 6, Pages E-6-47 thru E-6-49	Enclosure 6, Pages E-6-47 thru E-6-50
Enclosure 7	Enclosure 7
Enclosure 8, SCHOOL CODES (TAB)	Enclosure 8, VACANT (TAB)
Enclosure 8	
Enclosure 10, AWARD CODES (TAB)	Enclosure 10, VACANT (TAB)
Enclosure 10	
Appendix C, Page C-39 thru C-40	Appendix C, Page C-39 thru C-40
Appendix C, Page C-43 thru C-44	Appendix C, Page C-43 thru C-44
Appendix F, Page F-3 thru F-6	Appendix F, Page F-3 thru F-8
Index	Index

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of this manual.

R. A. ROOTH

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CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03
COMDT (G-WPM-2).	04

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
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Phone: 785 339-3660

HRSICNOTE 1000
24 July 2001

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-7 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

Continued on Next Page

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	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
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F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 1, Pages 1-1 thru 1-4; Replaced references to PMIS/JUMPS with "CGHRMS". Updated to reflect policy changes.
Chapter 2, Page 2-A-3; Changed reference in Step 2. Added requirement for member screening prior to transfer to semi-isolated units.
Chapter 2, Page 2-A-5; Changed reference in Steps 7 thru 9.
Chapter 2, Page 2-B-1 thru 2-B-50; Rewrite of Section 2-B to reflect changes in policy and procedures.
Chapter 2, Pages 2-C-1 and 2-C-6 thru 2-C-7; Moved sections regarding disability processing to 6-D.
Chapter 3, Pages 3-B-3 thru 3-B-8; Updated HRSIC's phone and fax numbers.
Chapter 3, Page 3-B-13; Updated HRSIC's phone and fax numbers.
Chapter 3, Page 3-B-18; Removed references to CFTRR.
Chapter 3, Pages 3-B-19 and 3-B-20; CG-3698A replaced with E-ADC. Updated HRSIC's fax number. Changed reference in Step 18 to Chapter 2-B vice Appendix (E).
Chapter 3, Pages 3-B-23 thru 3-B-26; Removed references to Appendix (A). Updated HRSIC phone numbers as applicable. Removed RET-3 category.
Chapter 3, Pages 3-B-23 thru 3-B-26; Removed references to CFTRR.
Chapter 4, Pages 4-C-1 thru 4-C-3; Changed to reflect input of Training and Education in CGHRMS.
Chapter 5, Pages 5-B-4 thru 5-B-7; Replaced with information on TRICARE Dental Program.
Chapter 5, Pages 5-C-1 and 5-C-3; Changed Table of Contents for section. Changed criteria for requesting SOCS.
Chapter 5, Pages 5-D-20 thru 5-D-21; Removed. SELRES and IRR now covered by TRICARE Dental Program.
Chapter 6, Pages 6-B-6 and 6-B-7; Removed any reference to "Advance Pay and Allowances".
Chapter 6, Page 6-C-1; Removed references to 6-C-2 and 6-C-3.
Chapter 6, Pages 6-C-2 and 6-C-3; Removed.
Chapter 6, Pages 6-C-9 and 6-C-11; Changed to reflect payments by PERSRUs vice ACOs; added requirement to notify HRSIC (MAS) prior to issuing payments.
Chapter 6, Pages 6-D-1 and 6-D-21 thru 6-D-23; Added section on disability processing. Various changes to and regarding processes.
Chapter 7, Pages 7-B-1 and 7-B-8 thru 7-B-9; Added section on Family Subsistence Supplemental Allowance (FSSA).
Chapter 7, Pages 7-D-1 thru 7-D-5; Added section on Career Status Bonus (CSB).
Chapter 8, Pages 8-B-4 thru 8-B-9; Updated state tax information.
Enclosure (1), DD Form 2494 & DD Form 2494-1; Removed IAW ALPERSRU V/00 & ALCOAST 055/01.
Enclosure (1), CG HRSIC-1160; Removed HRSIC-1160 IAW ALCOAST 003/01.
Enclosure (1), CG HRSIC-2000; Changed POV section; removed reference to government Impact Visa card. Removed option for and definition of Advance Pay and Allowances. Added block for selection of Advance TLE.

Continued on Next Page

Changes (cont.)

Enclosure (1), CG HRSIC-2001; Changed "foreign duty pay" to "hardship location duty-pay"; added steps #9, #23, and #24. Removed reference to "Advance Pay and Allowances".
Enclosure (1), CG HRSIC-2002; Updated CG Human Resources Management System Assignment Data Worksheet.
Enclosure (1), CG HRSIC-2003; Changed language in "Authorized Travel Time" block. Remainder of formula must be "at least" 51 miles vice "exceed" 51 miles. Also, added note that states travel and proceed time are not authorized in conjunction with retirement or separation. Added section on Advance TLE.
Enclosure (1), CG HRSIC-2010; Removed option for and definition of Advance Pay and Allowances. Added block for selection of Advance TLE.
Enclosure (1), CG HRSIC-2015; Updated Pay Delivery Worksheet.
Enclosure (1), CG HRSIC-2040; Removed address section. All allotments are EFT only. Added new Additional MGIB allotment. Amended "I" allotment to read "life insurance" vice "insurance".
Enclosure (1), CG HRSIC-2045; Removed reference to CFTRR IAW ALCOAST 003/01.
Enclosure (1), CG HRSIC-2075; Family Subsistence Supplemental Allowance (FSSA) Application.
Enclosure (1), CG HRSIC-2426; Career Status Bonus (CSB) Election.
Enclosure (1), CG HRSIC-5100; Modified monetary amount listed in Claim Code E.
Enclosure (1), CG HRSIC-7421; UTS Approving Official (AO) Designation.
Enclosure (1), CG HRSIC-7421/2; CGHRMS User Access Authorization/Revocation.
Enclosure (4), Page E-4-7; Amended section on DD Form 214 to include contact addresses for obtaining copies 6 months after separation.
Enclosure (5), Pages E-5-7 thru E-5-17; The 7.5 release of CGHRMS has taken ownership of certain data previously found on PDIF.
Enclosure (5), Page E-5-12; Removed references to Qual Test and Score.
Enclosure (6), Page E-6-22; Changed reference from Personnel Manual. Section dealing with UCMJ is 8-A vice sections 8-B and 8-M.
Enclosure (6), Page E-6-37; Included section on SRB's.
Enclosure (6), Page E-6-38; Removed reference to CFTRR IAW ALCOAST 003/01.
Enclosure (6), Page E-6-47; Requirement for SRB counseling on 14th anniversary removed IAW ALCOAST 049/00.
Enclosure (10), Pages E-10-5 and E-10-7; Changed points awarded for Secretary's Award of Outstanding Achievement and for Secretary's Award for Meritorious Achievement.
Appendix A; Removed Your Guide to Retirement, HRSICINST M1800.5B.
Appendix E; Removed The Traveler's Guide to Successful Claims Processing, HRSICPUB 4600.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages i thru vii	Table Of Contents, Pages i thru viii
Chapter 1, Pages 1-1 thru 1-4	Chapter 1, Pages 1-1 thru 1-4
Chapter 2, Page 2-1	Chapter 2, Page 2-1
Chapter 2, Page 2-A-3 thru 2-A-6	Chapter 2, Pages 2-A-3 thru 2-A-6
Chapter 2, Pages 2-B-1 thru 2-B-26	Chapter 2, Pages 2-B-1 thru 2-B-50
Chapter 2, Page 2-C-1 thru 2-C-2	Chapter 2, Page 2-C-1 thru 2-C-2
Chapter 2, Pages 2-C-5 thru 2-C-9	Chapter 2, Pages 2-C-5 thru 2-C-7
Chapter 3, Pages 3-B-3 thru 3-B-8	Chapter 3, Pages 3-B-3 thru 3-B-8
Chapter 3, Page 3-B-13 thru 3-B-14	Chapter 3, Page 3-B-13 thru 3-B-14
Chapter 3, Pages 3-B-17 thru 3-B-20	Chapter 3, Pages 3-B-17 thru 3-B-20
Chapter 3, Pages 3-B-23 thru 3-B-28	Chapter 3, Pages 3-B-23 thru 3-B-27
Chapter 3, Page 3-C-3 thru 3-C-4	Chapter 3, Page 3-C-3 thru 3-C-4
Chapter 4, Pages 4-C-1 thru 4-C-4	Chapter 4, Pages 4-C-1 thru 4-C-4
Chapter 5, Pages 5-B-1 thru 5-B-8	Chapter 5, Pages 5-B-1 thru 5-B-8
Chapter 5, Pages 5-C-1 thru 5-C-8	Chapter 5, Pages 5-C-1 thru 5-C-9
Chapter 5, Page 5-D-1 thru 5-D-2	Chapter 5, Page 5-D-1 thru 5-D-2
Chapter 5, Page 5-D-20 thru 5-D-21	
Chapter 6, Pages 6-B-5 thru 6-B-8	Chapter 6, Pages 6-B-5 thru 6-B-8
Chapter 6, Page 6-C-1 thru 6-C-2	Chapter 6, Page 6-C-1 thru 6-C-2
Chapter 6, Pages 6-C-9 thru 6-C-12	Chapter 6, Pages 6-C-9 thru 6-C-10
Chapter 6, Page 6-D-1 thru 6-D-2	Chapter 6, Page 6-D-1 thru 6-D-2
	Chapter 6, Pages 6-D-21 thru 6-D-23
Chapter 7, Page 7-1	Chapter 7, Page 7-1
Chapter 7, Page 7-B-1 thru 7-B-2	Chapter 7, Page 7-B-1 thru 7-B-2
Chapter 7, Pages 7-B-7 thru 7-B-8	Chapter 7, Pages 7-B-7 thru 7-B-10
	Chapter 7, Pages 7-D-1 thru 7-D-5
Chapter 8, Pages 8-B-3 thru 8-B-10	Chapter 8, Pages 8-B-3 thru 8-B-10
Chapter 10, Pages 10-A-3 thru 10-A-4	Chapter 10, Page 10-A-3 thru 10-A-4
Enclosure 1, Page E-1-1 thru E-1-2	Enclosure 1, Page E-1-1 thru E-1-2
Enclosure 1, DD Form 2494	
Enclosure 1, DD Form 2494-1	
	Enclosure 1, CG-4251
Enclosure 1, CG HRSIC-1160	
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
Enclosure 1, CG HRSIC-2001	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2002	Enclosure 1, CG HRSIC-2002
Enclosure 1, CG HRSIC-2003	Enclosure 1, CG HRSIC-2003
Enclosure 1, CG HRSIC-2010	Enclosure 1, CG HRSIC-2010
Enclosure 1, CG HRSIC-2015	Enclosure 1, CG HRSIC-2015
Enclosure 1, CG HRSIC-2040	Enclosure 1, CG HRSIC-2040
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045

Continued on Next Page

Procedure (cont'd)

Remove and insert the following pages.

	Enclosure 1, CG HRSIC-2075
	Enclosure 1, CG HRSIC-2426
Enclosure 1, CG HRSIC-5100	Enclosure 1, CG HRSIC-5100
	Enclosure 1, CG HRSIC-7421
	Enclosure 1, CG HRSIC-7421/2
Enclosure 4, Page E-4-7 thru E-4-8	Enclosure 4, Page E-4-7 thru E-4-8
Enclosure 5, Pages E-5-7 thru E-5-21	Enclosure 5, Pages E-5-7 thru E-5-17
Enclosure 6, Page E-6-1 thru E-6-2	Enclosure 6, Page E-6-1 thru E-6-2
Enclosure 6, Page E-6-21 thru E-6-22	Enclosure 6, Page E-6-21 thru E-6-22
Enclosure 6, Page E-6-37 thru E-6-38	Enclosure 6, Page E-6-37 thru E-6-38
Enclosure 6, Page E-6-47 thru E-6-48	Enclosure 6, Page E-6-47 thru E-6-48
Enclosure 10, Pages E-10-5 thru E-10-8	Enclosure 10, Pages E-10-5 thru E-10-8
Appendix A	
Appendix E	
Index	Index

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of this manual.

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Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03
COMDT (G-WPM-2).	04

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 357-3628

HRSICNOTE 1000
1 December 2000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-6 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	I	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 1, Page 1-13; Added DD Form 139 to list of forms referenced.
Chapter 2, Page 2-A-2; All references to CG-3698A changed to "E-ADC"; ETO changed to "Airport Terminal".
Chapter 2, Pages 2-A-4 thru 2-A-5; The Personnel Security Record (CG-5274) is no longer used. Removed requirement to send medical records via the PERSRU. Replaced all references to CG-3698A with E-ADC.
Chapter 2, Pages 2-A-6; Removed "upcoming change" from reference.
Chapter 3, Page 3-A-3; IAW SDAII Manual, the discharging PERSRU is responsible for transmitting discharge transaction from active duty AND the accession transaction for immediate enlistment in the Reserves.
Chapter 3, Page 3-B-18; CG-3698A replaced with E-ADC.
Chapter 3, Page 3-C-9; CG-3698A replaced with Electronic Assignment Data Card (E-ADC).
Chapter 5, Pages 5-A-1 thru 5-A-6; Removed "SGLI" from title of section. Updated step-by-step description on pages 5-A-4 thru 5-A-6.
Chapter 5, Pages 5-C-1 and 5-C-2; Updated to reflect the correct blocks on the CG-4170A. Added rule that if member with dependents fails to verify CG-4170A prior to 30 November, BAH entitlement will no longer be stopped. It is instead changed to BAH without.
Chapter 5, Page 5-C-7; PMIS is no longer updated with security clearance data. That information is entered into CGHRMS now.
Chapter 5, Page 5-D-1; Updated Section Overview.
Chapter 5, Page 5-D-13 thru 5-D-14; CG-3698A is replaced with E-ADC.
Chapter 6, Page 6-C-12; Changed responsible office to MAS.
Chapter 6, Pages 6-D-19 and 6-D-20; Changed reporting procedures for discrepancies on Annual Reserve Retirement Point Statements.
Chapter 9, Pages 9-B-2 and 9-B-3; Included time frame for action to be completed during waiver/remission process.
Chapter 10, Pages 10-B-4 and 10-B-6; Added requirement to notify Travel Charge Card Representative once a member has been UA for over 24 hours.
Enclosure (1), Page E-1; Added new forms HRSIC-2002 and HRSIC-7421.
Enclosure (1), CG HRSIC-1900; Removed incorrect reference to DLA from bottom margin of page.
Enclosure (1), CG HRSIC-2000; Referenced JFTR. Added selection of type of household goods move.
Enclosure (1), CG HRSIC-2002; Added CG Human Resources Management System Assignment Data Worksheet.
Enclosure (1), CG HRSIC-2030; Included reference to eligibility requirements for advancement.
Enclosure (1), CG HRSIC-2040; Moved signature block and Privacy Act Statement to front of form.

Continued on next page

Changes (continued)

Enclosure (1), CG HRSIC-2045; Clarified in Separation Section requirement for physical within one year prior to release, discharge, or retirement.
Enclosure (1), CG HRSIC-2070; Changed TONO and ACCT DATA blocks.
Enclosure (1), CG-HRSIC-5100, Updated form to reflect new officer uniform allowance rates.
Enclosure (1), CG HRSIC-7421; New form. CGHRMS User Access Authorization/Revocation.
Enclosure (4), Page E-4-7, Removed "Once A Veteran" pamphlet as an enclosure. The VA no longer prints this document.
Enclosure (6), Page E-6-1, Changed page numbers on SRB section due to addition of two new Separation Page 7's.
Enclosure (6), Page E-6-3; Deleted statement outlining requirement to use the sequential numbers assigned to each CG-3307 entries. The requirement for header information is already indicated in the latest COMDTINST 1000.14B.
Enclosure (6), Page E-6-6, Modified wording of Accession (ACC-3) entry.
Enclosure (6), Page E-6-21; Removed specific examples from Page 7 entries to highlight the fact that these are general entries and not subject specific.
Enclosure (6), Page E-6-42 and E-6-43; Added sample Page 7 entries for separation for members with ongoing medical complications.
Enclosure (8), E-8-1 thru E-8-66, Updated list of school codes.
Enclosure (9), E-9-2 thru E-9-5; Updated list of foreign countries and their abbreviation codes.

Change 2 to HRSICINST M1800.5B, Your Guide To Retirement

Appendix A, Cover & Table of Contents; Added Delta Dental toll free number to inside of cover. Updated table of contents.
Appendix A, Pages 5-1; Added new topic: "Special Compensation for Severely Disabled Uniform Services Retirees"; changed topic heading.
Appendix A, Pages 5-16 and 5-17; Added page "Special Compensation for Severely Disabled Uniform Services Retirees". Changed heading on page 5-17 to "Dual Compensation or Level V Restrictions" and added statement on discontinuance of offset from military retired pay for dual compensation.
Appendix A, Pages A-1 and A-2; Reissued to reflect correct change number (CH-1) in footer. Previously issued as "CH-5".

Resume Change 6 to PPPM

Appendix B, Replaced entire appendix with DOD modified version. Note that affective date is the same as previous version. Content has not changed but layout was improved.
Index, Page I-1 thru I-7, Updated index.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages i thru vii	Table Of Contents, Pages i thru vii
Chapter 1, Pages 1-13 thru 1-14	Chapter 1, Pages 1-13 thru 1-14
Chapter 2, Pages 2-A-1 thru 2-A-6	Chapter 2, Pages 2-A-1 thru 2-A-6
Chapter 3, Pages 3-A-3 thru 3-A-4	Chapter 3, Pages 3-A-3 thru 3-A-4
Chapter 3, Pages 3-B-17 thru 3-B-18	Chapter 3, Pages 3-B-17 thru 3-B-18
Chapter 3, Pages 3-C-9 thru 3-C-10	Chapter 3, Pages 3-C-9 thru 3-C-10
Chapter 5, Pages 5-A-1 thru 5-A-6	Chapter 5, Pages 5-A-1 thru 5-A-6
Chapter 5, Pages 5-C-1 thru 5-C-2	Chapter 5, Pages 5-C-1 and 5-C-2
Chapter 5, Pages 5-C-7 thru 5-C-8	Chapter 5, Pages 5-C-7 thru 5-C-8
Chapter 5, Pages 5-D-1 thru 5-D-2	Chapter 5, Pages 5-D-1 thru 5-D-2
Chapter 5, Pages 5-D-13 thru 5-D-20	Chapter 5, Pages 5-D-13 thru 5-D-21
Chapter 6, Pages 6-C-11 thru 6-C-12	Chapter 6, Pages 6-C-11 thru 6-C-12
Chapter 6, Pages 6-D-19 thru 6-D-20	Chapter 6, Pages 6-D-19 thru 6-D-20
Chapter 9, Pages 9-B-1 thru 9-B-3	Chapter 9, Pages 9-B-1 thru 9-B-3
Chapter 10, Pages 10-B-3 thru 10-B-6	Chapter 10, Pages 10-B-3 thru 10-B-6
Enclosure 1, Pages E-1 thru E-2	Enclosure 1, Pages E-1 thru E-2
Enclosure 1, CG HRSIC-1900	Enclosure 1, CG HRSIC-1900
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
	Enclosure 1, CG HRSIC-2002
Enclosure 1, CG HRSIC-2030	Enclosure 1, CG HRSIC-2030
Enclosure 1, CG HRSIC-2040	Enclosure 1, CG HRSIC-2040
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2070	Enclosure 1, CG HRSIC-2070
Enclosure 1, CG-HRSIC-5100	Enclosure 1, CG-HRSIC-5100
	Enclosure 1, CG HRSIC-7421/2
Enclosure 4, Pages E-4-7 thru E-4-9	Enclosure 4, Pages E-4-7 thru E-4-8
Enclosure 6, Pages E-6-1 thru E-6-6	Enclosure 6, E-6-1 thru E-6-6
Enclosure 6, Pages E-6-21 thru E-6-22	Enclosure 6, Pages E-6-21 thru E-6-22
Enclosure 6, Pages E-6-41 thru E-6-48	Enclosure 6, Pages E-6-41 thru E-6-49
Enclosure 8	Enclosure 8
Enclosure 9	Enclosure 9
Change 2 to HRSICINST M1800.5B, Your Guide To Retirement	
Appendix A, Cover	Appendix A, Cover
Appendix A, Table of Contents, i thru ii	Appendix A, Table of Contents (CH-2)
Appendix A, Pages 5-1 thru 5-2	Appendix A, Pages 5-1 thru 5-2 (CH-2)
Appendix A, Pages 5-15 thru 5-16	Appendix A, Pages 5-15 thru 5-17 (CH-2)
Appendix A, Pages A-1 thru A-2	Appendix A, Pages A-1 thru A-2 (CH-1)
Resume Change 6 to PPPM	
Appendix B	Appendix B
Index	Index

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of this manual.

R. D. RECK

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Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03

U.S. Department of Transportation
United States Coast Guard

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USCG HUMAN RESOURCES
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HRSICNOTE 1000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-5 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
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F				1			1		1																	
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H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 1, Pages 1-7 thru 1-8; Second class petty officers authorized "by direction" authority with certain restrictions to sign forms and worksheets and for designation as Payment Approving Officials to sign PMIS/JUMPS transactions. Specification required on CG HRSIC-7210 of PAO authority granted to second class petty officers.
Chapter 2, Page 2-A-2 thru 2-A-3; Changed the name of CG HRSIC-2000 from PCS Departing Worksheet to PCS Departing/Separation Worksheet. Step 4 of PCS Departing Checklist changed to reflect and include ALCOAST 049/00
Chapter 2, Pages 2-B-1; Changed page number of TDY Checklist.
Chapter 2, Pages 2-B-22 thru 2-B-23; Updated example of TQC message.
Chapter 3, Page 3-B-18; Added ALCOAST 049/00 to reference listing of Step 1.
Chapter 3, Page 3-B-19; Added CG HRSIC-2000 PCS Departing/Separation Worksheet and CG HRSIC-2003 PCS Entitlements Worksheet to Step 5.
Chapter 3, Page 3-B-20; Modified step 11 by removing cancelled form CG-5274 as part of Final Termination Briefing and updated reference.
Chapter 3, Page 3-B-23; Added note regarding availability of retirement forms on HRSIC Website.
Chapter 3, Page 3-B-26; Noted instance in which reservists may be involuntarily transferred to RET-2 status.
Chapter 3, Pages 3-C-2 thru 3-C-10; Assigned responsibility for SRB calculation to HRSIC (MAS) vice (SES).
Chapter 3, Page 3-C-3; Allowed Reservists to reenlist up to 90 days prior to expiration of enlistment vice 60 days. Entered note regarding PMIS Code replacement of Page 7 requirement as outlined in ALCOAST 049/00.
Chapter 5, Page 5-A-9; Reserve SGLI will be administratively terminated due to non-payment at the end of 5 months vice 2 months.
Chapter 5, Page 5-C-2; Changed distribution of CG-4170 to reflect distribution changes made in change 4 of this manual.
Chapter 5, Page 5-C-3 thru 5-C-4; Included pay base date and/or active duty base date discrepancies as a basis for requesting immediate adjustment to Statement of Creditable Service. Changed steps completed by unit and PERSRU.
Chapter 5, Page 5-C-5; Added E-mail to Unit PDIF transmission options.
Chapter 5, Pages 5-D-4 thru 5-D-5; Designated HRSIC (MAS) to screen requests to carry over 60 days LV and forwards eligible requests to COMDT (G-WPM-1).
Chapter 5, Page 5-D-11; Changed disposition of Mailing Address Change for retired members.
Chapter 6, Page 6-D-6; Modified language in the Rules for Reporting Drills. Eliminated requirement for CO's letter justifying untimely submission of drills over 90 days old.

Continued on Next Page

Changes (cont.)

Chapter 6, Page 6-D-14; Eliminated requirement for CO's letter justifying untimely submission of drills over 90 days old.
Chapter 7, Pages 7-A-1 and 7-A-8; Added Funeral Duty Pay for Reservists as established in ALCOAST 244/99.
Chapter 7, Pages 7-C-1 thru 7-C-5; Established guidelines, rules, and procedures for Savings Deposit Program.
Chapter 8, Pages 8-B-4 thru 8-B-9; Updated State Tax Listing.
Chapter 10, Page 10-B-4; Changed reference numbers.
Enclosure (1), E-1-1 thru E-1-2; Updated list.
Enclosure (1), DD Form 2648; Revised by DOD November 1999.
Enclosure (1), CG HRSIC-1900; Added retired pay projection Website link.
Enclosure (1), CG HRSIC-2000; Changed various sections to reflect authorized entitlements for PCS transfer and Separations. Changed wording of POV Information section to reflect only one authorized POV shipment.
Enclosure (1), CG HRSIC-2001; Amended revision date of form.
Enclosure (1), CG HRSIC-2003; Removed block for "Current PDS". Removed reference to JFTR in DLA block. Amended block on Authorized Travel Time. Included sections for Alaskan Marine Highway System and OCONUS mileage.
Enclosure (1), CG HRSIC-2025; Added effective date of change in BAH status.
Enclosure (1), CG HRSIC-2045; Added "CO's recommendation signature" block for extension/reenlistment. Specified "Discharge/RELAD only" for selection of travel destination. Included block for vacating government quarters. Corrected order in which terminal leave is counted for retirements. Added note for retirements regarding input into SDA II of periods at processing point and permissive temporary duty dates.
Enclosure (1), CG HRSIC-2070; Amended revision date on form.
Enclosure (6); Updated to reflect current procedures as discussed in COMDTINST 1000.14B. Removed "Progressing" option from A&R-10.
Enclosure (7), Page E-7-1; Added "FOUO" to CASREP message example.
Enclosure (10), Pages E-10-5 and E-10-8; Added Physicians Assistant/Nurse Practitioner Insignia. Changed "Secretary's Award for Meritorious Achievement" to "silver" vice "gold".
Appendix A, Page A-1; Included information on availability of forms on HRSIC Website.
Appendix A, Page A-25; Added retired pay projection Website link to CG HRSIC-1900.
Appendix E; Changed various pages to reflect new travel policies. This is Change 1 to The Traveler's Guide to Successful Claims Processing.
Appendix F; Changed text to reflect current terminology.
Index, Pages I-1 thru I-7; Updated the Index pages.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table of Contents, Pages i thru vii	Table of Contents, Pages i thru vii
Chapter 1, Page 1-7 thru 1-8	Chapter 1, Page 1-7 thru 1-8
Chapter 2, Page 2-A-1 thru 2-A-4	Chapter 2, Page 2-A-1 thru 2-A-4
Chapter 2, Page 2-B-1 thru 2-B-2	Chapter 2, Page 2-B-1 thru 2-B-2
Chapter 2, Page 2-B-21 thru 2-B-26	Chapter 2, Page 2-B-21 thru 2-B-26
Chapter 3, Page 3-B-17 thru 3-B-20	Chapter 3, Page 3-B-17 thru 3-B-20
Chapter 3, Page 3-B-23 thru 3-B-26	Chapter 3, Page 3-B-23 thru 3-B-26
Chapter 3, Page 3-C-1 thru 3-C-4	Chapter 3, Page 3-C-1 thru 3-C-4
Chapter 3, Page 3-C-9 thru 3-C-10	Chapter 3, Page 3-C-9 thru 3-C-10
Chapter 5, Page 5-A-9 thru 5-A-10	Chapter 5, Page 5-A-9 thru 5-A-10
Chapter 5, Page 5-C-1 thru 5-C-6	Chapter 5, Page 5-C-1 thru 5-C-6
Chapter 5, Page 5-D-3 thru 5-D-6	Chapter 5, Page 5-D-3 thru 5-D-6
Chapter 5, Page 5-D-11 thru 5-D-12	Chapter 5, Page 5-D-11 thru 5-D-12
Chapter 6, Page 6-D-5 thru 6-D-6	Chapter 6, Page 6-D-5 thru 6-D-6
Chapter 6, Page 6-D-13 thru 6-D-14	Chapter 6, Page 6-D-13 thru 6-D-14
Chapter 7, Page 7-1	Chapter 7, Page 7-1
Chapter 7, Page 7-A-1 thru 7-A-2	Chapter 7, Page 7-A-1 thru 7-A-2
Chapter 7, Page 7-A-7 thru 7-A-8	Chapter 7, Page 7-A-7 thru 7-A-8
	Chapter 7, Page 7-C-1 thru 7-C-5
Chapter 8, Page 8-B-3 thru 8-B-10	Chapter 8, Page 8-B-3 thru 8-B-10
Chapter 10, Page10-B-3 thru 10-B-4	Chapter 10, Page 10-B-3 thru 10-B-4
Enclosure 1, Page E-1-1 thru E-1-2	Enclosure 1, Page E-1-1 thru E-1-2
Enclosure 1, DD Form 2648	Enclosure 1, DD Form 2648
Enclosure 1, CG HRSIC-1900	Enclosure 1, CG HRSIC-1900
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
Enclosure 1, CG HRSIC-2001	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2003	Enclosure 1, CG HRSIC-2003
Enclosure 1, CG HRSIC-2025	Enclosure 1,.CG HRSIC-2025
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2070	Enclosure 1, CG HRSIC-2070
Enclosure 6	Enclosure 6
Enclosure 7, Page E-7-1 thru E-7-2	Enclosure 7, Page E-7-1 thru E-7-2
Enclosure 10, Page E-10-5 thru E-10-8	Enclosure 10, Page E-10-5 thru E-10-8
Appendix A, Page A-1 thru A-2	Appendix A, Page A-1 thru A-2
Appendix A, Page A-25 thru A-26	Appendix A, Page A-25 thru A-26
Appendix E, Page 3 thru 6, CH-1	Appendix E, Page 3 thru 6, CH-1
Appendix E, Page 17 thru 20, CH-1	Appendix E, Page 17 thru 20, CH-1
Appendix E, Page 25 thru 26, CH-1	Appendix E, Page 25 thru 26, CH-1
Appendix E, Page 29 thru 30, CH-1	Appendix E, Page 29 thru 30, CH-1
Appendix F	Appendix F
Index, Pages I-1 thru I-7	Index, Pages I-1 thru I-7

Continued on Next Page

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G. E. SENA

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Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
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TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
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ISC Alameda	10
NOAA Units	03

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

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TOPEKA, KS 66683-3591
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Phone: 785 357-3628

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-4 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

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Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	I	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
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F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Signature of Responsible Officer, Page 1-8; Added E5's to list of members eligible to be designated at Payment Approving Officials (PAO) IAW COMDTINST M7210.1 (series), page 1-3.

Forms Referenced in this Manual, Page 1-13; Removed Reserve Assignment Request and Orders, CG-5525, which has been replaced by the Assignment Data, CG-3698A.

Permanent Change of Station, Pages 2-A-1 thru 2-A-7; Updated the procedures before a PCS transfer.

Temporary Additional Duty, Pages 2-B-1; Rewrite of entire section to reflect current procedures established by HRSIC (travel) business line.

Active Duty For Training, Pages 2-C-1 thru 2-C-9; Update the ADT process for reserve members, amendments and preparation for Annual Screening Questionnaire.

Recalled Retired Members, Pages 3-A-3 thru 3-A-4; Clarified the payment procedures for retired members recalled to duty.

Separations Process, Pages 3-B-1 thru 3-B-28; Updated the separation process. Corrected submission time of pre-discharge interviews to 6 months. Corrected submission time of Assignment Data form to six months prior to separation.

Immediate Enlistment in the CG Reserve Upon Discharge, Page 3-C-9; Removed references to form CG-5525 which has been replaced by the Assignment Data Form, CG-3698A.

Training and Educational Accomplishments, Page 4-C-3
Removed "Reserve Information Worksheet" as prescribed form for reporting reserve educational accomplishments due to previous cancellation of form in change 3 to 3PM. Added "Record Of Professional Development, CG-4082 as an optional form for reporting accomplishments and entry in official record.

BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Section 5-A; Removed references to recording SGLI dependents on CG-4170A, as this is no longer required. Updated 5-A-7 and 8 to reflect current policy for Reserve coverage under SGLI. Made corrections to signature and distribution requirements of the SGLV-8286 and CG-4170A.

Continued on Next Page

Changes (cont.)

Family Member Dental Plan, Pages 5-B-4 and 5-B-5; Included reference to OCONUS coverage. Necessitates intent on the part of the member to remain on active duty. Stipulates active duty obligation for reservists enrolling in the program.

Transcript of Sea Service (TOSS), Page 5-C-8; Deleted Size and tonnage of each vessel and replaced with Shaft Horsepower.

Preparation of the DD Form 2 CG and DD Form 2, Page 5-D-8; Updated referenced location of Geneva Convention Categories.

Personnel Administration, Page 5-D-11; Updated disposition for Reporting Change in Mailing Address for reservists.

Permissive Travel Authorization, Page 5-D-16; Included note suggesting members on house hunting orders take certified copies of LES.

Annual Reserve Retirement Point Statement, Page 6-D-19 and 6-D-20; Changed office of responsibility from CST to SES for monthly and annual reserve retirement point statements.

Allotment Check-off List, Page 8-A-3; Allows member multiple allotments to the same payee with certain provisions.

State Tax Listing, Page 8-B-4 through 8-B-9; Added new chart giving World Wide Web addresses for obtaining tax info/documents. Added new phone numbers of state tax offices. Added note regarding Connecticut requirement for yearly certification of tax exemption.

Forms and Worksheets, Page E-1-1; Added new form, CG HRSIC-2003, PCS (JFTR, Chap 5) Entitlements Worksheet.

Preseparation Counseling Checklist, DD Form 2648; The form has been updated by the DOD.

PCS Departing Worksheet, CG HRSIC-2000, Enclosure (1); Updated the PCS departing Worksheet.

Continued on Next Page

Changes (cont.)

Departing TDY or PCS/TEMDUINS TO "A" School Worksheet, CG HRSIC-2001, Enclosure (1); Revised description in the "Purpose" block.

PCS Entitlements Worksheet, CG HRSIC-2003; Introduction of new form for computing PCS entitlements IAW JFTR Chapter 5.

Dependency Worksheet, CG HRSIC-2020; Changed PAYMAN reference.

Career Development Worksheet, CG HRSIC 2030; Revised form to include chain of command approval for advancement to E-2, E-3 and E-4 and require Verifying (Admin) Official review and signature.

Allotment Worksheet, CG HRSIC-2040; Added Series "EE" to Allotment Code B and added Series "I" to Allotment Code G on reverse of form.

Bond Worksheet, CG HRSIC-2060; Revised form to include Series I Savings Bond Election Table.

TDY Travel Request/Authorization Worksheet, CG HRSIC 2070; Changed abbreviation TAD to TDY.

Block by Block Description of PDIF, Enclosure (5), Pages E-5-1 thru E-5-21; Rewrite of PDIF block by block description to match newly formatted PDIF form.

Training School Listing, Enclosure (8); Updated the PMIS Code and Course title listing. Added step/action table describing school code process.

Award Codes, Enclosure (10) pages 5 and 11; Adds Port Security Unit Insignia to list of award codes.

Appendix A, Retirement Package; Replaced previous contents with "Your Guide in Retirement," HRSICINST M1800.5 (series).

Appendix D, PDR System; Adds page instructing members to place a copy of updated COMDTINST M1080.10E in this section.

Index, Pages I-1 thru I-5; Updated the Index pages.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table of Contents, Pages i thru vii	Table of Contents, Pages i thru vii
Chapter 1, Page 7	Chapter 1, Page 7
Chapter 1, Page 13	Chapter, Page 13
Chapter 2, Page 2-1	Chapter 2, Page 2-1
Chapter 2, Page 2-A-1 thru 2-A-7	Chapter 2, Page 2-A-1 thru 2-A-7
Chapter 2, Page 2-B-1 thru 2-B-15	Chapter 2, Page 2-B-1 thru 2-B-25
Chapter 2, Page 2-C-1 thru 2-C-8	Chapter 2, Page 2-C-1 thru 2-C-9
Chapter 3, Page 3-A-3	Chapter 3, Page 3-A-3
Chapter 3, Pages 3-B-1 thru 3-B-27	Chapter 3, Pages 3-B-1 thru 3-B-27
Chapter 3, Page 3-C-9	Chapter 3, Page 3-C-9
Chapter 4, Page 4-C-1 thru 4-C-3	Chapter 4, Page 4-C-1 thru 4-C-3
Chapter 5, Page 5-A-1 thru 5-A-15	Chapter 5 Page 5-A-1 thru 5-A-15
Chapter 5, Page 5-B-3 thru 5-A-5	Chapter 5 Page 5-B-3 thru 5-B-5
Chapter 5, Page 5-C-7	Chapter 5, Page 5-C-7
Chapter 5, Page 5-D-1	Chapter 5, Page 5-D-1
Chapter 5, Page 5-D-7	Chapter 5, Page 5-D-7
Chapter 5, Page 5-D-11	Chapter 5, Page 5-D-11
Chapter 5, Page 5-D-15	Chapter 5, Page 5-D-15
Chapter 6, Page 6-D-19	Chapter 6, Page 6-D-19
Chapter 8, Page 8-A-3	Chapter 8, Page 8-A-3
Chapter 8, Pages 8-B-1 thru 8-B-17	Chapter 8, Pages 8-B-1 thru 8-B-17
Enclosure (1), Page E-1-1	Enclosure (1), Page E-1-1
Enclosure (1), DD Form 2648	Enclosure (1), DD Form 2648
Enclosure (1), CG HRSIC-2000	Enclosure (1), CG HRSIC-2000
Enclosure (1), CG HRSIC-2001	Enclosure (1), CG HRSIC-2001
	Enclosure (1), CG HRSIC-2003
Enclosure (1), CG HRSIC-2020	Enclosure (1), CG HRSIC-2020
Enclosure (1), CG HRSIC-2030	Enclosure (1), CG HRSIC-2030
Enclosure (1), CG HRSIC-2040	Enclosure (1), CG HRSIC-2040
Enclosure (1), CG HRSIC-2060	Enclosure (1), CG HRSIC-2060
Enclosure (1), CG HRSIC-2070	Enclosure (1), CG HRSIC-2070
Enclosure (5), Description of PDIF	Enclosure (5), Description of PDIF
Enclosure (8), School Codes	Enclosure (8), School Codes
Enclosure (10), Pages E-10-5 and E-10-11	Enclosure (10), Pages E-10-5 and E-10-11
Appendix (A), Retirement Package	Appendix (A), “Your Guide To Retirement”
Appendix (D), PDR System	Page D-1
Index, Pages I-1 thru I-5	Index, Pages I-1 thru I-5

Continued on Next Page

5. **Comments and Recommendations** Comments or recommendations may be submitted by E-mail to "PUBS/HRSIC" or by returning the comment form on Enclosure (11) of this manual.

R. J. WILLIAMSON

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CCGD13 PERSRU	06
CCGD14 PERSRU	05
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TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
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ISC Kodiak	10
ISC Alameda	10
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HRSICNOTE 1000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-3 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. **Purpose.** This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. **Action.** Addressees shall enter page changes as indicated in the Procedure section of this Notice.

3. **Summary**. The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

PCS Transfer Process, pages 2-A-2 and 2-A-5: Updated stage 4 of the PCS transfer process to include the use of the new Departing TAD or PCS/TEMDUINS To "A" School Worksheet (CG HRSIC-2001) if applicable. Added DEERS update requirement for address change upon PCS to PCS Reporting Checklist.

Purpose of TAD Order, page 2-B-2: Added a note to the Purpose of a TAD order to use the new Departing TAD or PCS/TEMDUINS To "A" School Worksheet (CG HRSIC-2001) for members going TAD to class "A" School.

Active Duty For Training, section 2-C: Expanded "How to Process an ADT Order" section. Added "Amendments to ADT Orders" page. Removed ADT Checklist.

Transfer of Personnel, section 2-D: Added new section to chapter 2 entitled "Active Duty Other Than Training – ADOT." This section focuses on ADSW-AC (formally TEMAC) procedures to follow in projecting costs, document ID's, Accounting Data and processing ADSW-AC orders.

Separation Processing, pages 3-B-5, 7, 20, and Enclosure 4: Added requirement for PERSRU to prepare DD-214, SDAII transactions and separation letter(s). Gave samples of letters in Enclosure (4).

Checklist for Separations, pages 3-B-18 through 3-B-19: Added ALCOAST 091/98 reference for predischarge interview action. Prescribed use of CG-3698A, Assignment Data to request assignment to a unit as a reservist following RELAD, vice using form CG-5525, Coast Guard Reserve Assignment Request and Orders which is discontinued.

E-mail Addresses, pages 3-B-5 through 3-B-12; 3-B-19; 8-A-5; 10-A-11 and Enclosure 11: Changes have been made to update HRSIC E-mail address (es), to SWSIII format. SWSII users should also use these addresses but route via their designated center utilizing the world wide web.

Continued on Next Page

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C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
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Separations, pages 3-B-1 through 3-B-27: Removed the words "Expedited Separations" from Topic Chart, item 4 on page 3-B-1. Removed Page 3-B-17, sample E-mail for disability retirement, and combined information with Exhibit 3-B-1. Increased submission time to 60 days vice 45 days for CG-HRSIC-2045, Career Intentions Worksheet. Added HRSIC (SES/HRSIC) to distribution on message request for cancellation of document numbers and accounting data.

Reserve Retirement Separations, pages 3-B-26 through 3-B-28: New section added to explain procedures for Reserve Retirements.

Checklist for Reenlistment or Extension, Page 3-C-4: Changed wording on When/Then table to clarify initial SRB installment payment period.

Servicemembers' Group Life Insurance (SGLI), Pages 5-A-7 to 5-A-14: Added note to Reserve member's coverage awaiting retired pay. Modified wording to emphasize importance of having a witness signature.

Family Member Dental Plan, Page 5-B-7: Added option to fax DD-2492-1. Updated mailing address and provided fax number.

Defense Enrollment Eligibility Reporting System (DEERS) Page 5-B-17 to 5-B-18: Added new requirement that members must update their residential address within 30 days of a move such as PCS or any other change in residence.

Annual Verification of CG-4170A, Page 5-C-2: Updated procedures on the annual verification of the CG-4170A. Units should use the member's unit PDR copy of the CG-4170A for annual verification.

Requesting Statements of Creditable Service, Pages 5-C-3 to 5-C-4: Moved the last part of Stage 2 to the last part of Stage 1.

Security Clearances, Page 5-C-7: COMDTINST M5520.12A has replaced COMDTIST M5520.12. CG-5588 and SF-312 replaced CG-5274 as the forms to be attached to the Certificate of Clearance.

Leave Carried Over In Excess of 60 Days, Page 5-D-4: Added submission deadline date for letter requesting to carry over leave in excess of 60 days.

Reporting Change in Mailing Address, Page 5-D-11, 5-D-13: Removed form CG-HRSIC-2055 as an option for change in mailing address. Form is discontinued. Expanded "disposition" information and added PERSRU action to 5-D-11. Prescribed use of CG-3698A vice CG-HRSIC-2055 for requesting reserve reassignment.

Payment of Mobile Unit Personnel, Page 6-C-6 to 6-C-7: Added Pacific Area Fleet Training Group to the list of units eligible for continual CSEAPAY. Reworded the Subsistence Allowance paragraph to indicate that continual BAS or SEPRATS are authorized for Mobile Unit Personnel who are TAD aboard a government vessel.

Payment of Inactive Duty Reservists, section 6-D-1 through 6-D-20: Clarified IDT prerequisites. Expanded the IDT Process table to give more detailed instructions for each stage. Provided sample drill orders and amendments to orders. Clarified UAR procedures and provided a sample IDT Certification Sheet.

Change Income Tax Withholding Status for Puerto Rico, Page 8-B-7: If a member claims Puerto Rico as their state of legal residence and is assigned duty in the U.S., Federal income tax is withheld. If the member is assigned duty outside the U.S., Puerto Rico State income tax is withheld. This withholding agreement is effective 1 January 1998. Withholding for Puerto Rico State Tax begins 1 April 1998.

Continued on Next Page

Information about the W-2 Form and How To Request A Duplicate Or Corrected W-2 Form, Pages 8-B-12 through 8-B-14: Minor grammatical changes on 8-B-12 and 8-B-13. Page 8-B-14 changed to clarify information about block 15 on W-2 and procedures for requesting a replacement W-2 Form.

How to complete Enlisted Performance Evaluation Forms, Page 10-A-9, Step 7: Use of the "Progressing" and "Performance Qualifications Completed" ovals have been discontinued as per ALDIST 189/98.

Forms and Worksheets Enclosure (1):

- Updated the CG-HRSIC-1160, Centralized First Term Reenlistment Review (CFTRR) Application. Added reference line below the "No" box in block 12.
- Updated the CG HRSIC-2000, PCS Departing Worksheet, added JFTR References in the travel advances section on the reverse side and reworded the DLA section to clarify members' entitlement to advances of DLA. Added "Caution" block in member section. Added "Member Initials" and statement of understanding in signature block section.
- Created CG HRSIC-2001, Departing TAD or PCS/TEMDUINS to "A" School Worksheet.
- Updated the CG-HRSIC-2020, Dependency Worksheet, by adding an * to the reverse side of form in the "Documentation to be submitted" column for adopted child and child placed for adoption.
- Updated the CG-HRSIC-2025, BAH/Housing Worksheet, Privacy Act Statement to include Authority and Disclosure statements.
- Updated CG HRSIC-2030, Career Development Worksheet, to allow room for signature under Command Approval block on bottom of page.
- Updated CG HRSIC-2045, Career Intentions Worksheet, as follows:
  a. The Extension/Reenlistment Section reworded to show Effective Date Of Extension/Reenlistment vice Effective Date only and the reason for requesting an extension or reenlistment.
  b. The Final Mailing Address section was reworded to state that the final mailing address is the location where the W-2 form will be sent the following year.
  c. A block entitled "For Retirement Only" was added to record if member intends to utilize a retirement processing station, 10 days permissive temporary duty for retirement area familiarization and/or terminal leave, and dates for each.
  b. The Command Approval block has been enlarged to allow for signature.
- Deleted CG HRSIC-2055, Reserve Information Worksheet. All functions on the form, with exception of transfer request, may be accomplished via E-mail, LES pen and ink correction submission or submission of course completion letters and transcripts. Transfer requests will be completed via CG-3698A, Assignment Data Form.
- Created CG HRSIC-2055A, Reserve Retirement Transfer Request. This optional form may be used by a reservist to request retirement vice using a letter request.
- Updated CG HRSIC-2070, Tad Travel Request/Authorization Worksheet. Added E, F, and G to page 2 in the PERSRU section of the worksheet.

Standard Separation Letters Enclosure (4): Updated members' and spouses' letters to add the eligibility to disenroll from SBP coverage between the members' second and third retirement years. Created Letters for: Member Due Money, Member Owes Money, Info Regarding ACDU Separation Status, and RELAD.

School Codes Contents Enclosure (8): Added new school codes to the list.

State/Foreign Country Abbreviations Enclosure (9): Added Ukraine to the list of foreign countries.

Continued on Next Page

Award Codes Enclosure (10): Added new award, Army Professional.

Comment Form, Enclosure 11: Updated HRSIC (PRC) E-mail address on form.

Retirement Package, Appendix A: Removed punctuation from address to comply with postal standards. Changed Commandant (G-PMP) to (G-WPM) in Section V, paragraph 6 of form CG-HRSIC-4700.

Instructions for the DD-1172, Appendix B: Identification (ID) Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals, DOD Instruction 1000.13 dated 30 December 1992 is canceled and replaced with an updated version dated 5 December 1997.

Computation Of Service, Appendix C: Clarified computation of creditable sea service when leave is taken in conjunction with TAD from a career sea pay eligible vessel.

Index: Added Reserve Dental Plan and Reserve Retirements to index.

Continued on Next Page

4. **PROCEDURE.** Remove and insert the following pages:

Remove	Insert
Table of Contents Pages i-ii	Table of Contents Pages i-ii
Chapter 2, Page 2-1	Chapter 2, Page 2-1
Chapter 2-A, Pages 1-2	Chapter 2-A, Pages 1-2
Chapter 2-A, Pages 5-6	Chapter 2-A, Pages 5-6
Chapter 2-B, Pages 1-2	Chapter 2-B, Pages 1-2
Chapter 2-C, Pages 1-6	Chapter 2-C, Pages 1-6
	Chapter 2-D, Pages 1-7
Chapter 3-B, Pages 1-25	Chapter 3-B, Pages 1-27
Chapter 3-C, Pages 3-4	Chapter 3-C, Pages 3-4
Chapter 5-A, Pages 7-14	Chapter 5-A, Pages 7-14
Chapter 5-B, Pages 7-8	Chapter 5-B, Pages 7-8
Chapter 5-B, Pages 17-18	Chapter 5-B, Pages 17-18
Chapter 5-C, Pages 1-4	Chapter 5-C, Pages 1-4
Chapter 5-C, Pages 7-8	Chapter 5-C, Pages 7-8
Chapter 5-D, Pages 3-4	Chapter 5-D, pages 3-4
Chapter 5-D, Pages 11-14	Chapter 5-D, Pages 11-14
Chapter 6-C, Pages 5-8	Chapter 6-C-, Pages 5-8
Chapter 6-D, Pages 1-15	Chapter 6-D, Pages 1-20
Chapter 8-A, Page 5	Chapter 8-A, Page 5
Chapter 8-B, Pages 7-8	Chapter 8-B, Pages 7-8
Chapter 8-B, Pages 11-14	Chapter 8-B, Pages 11-14
Chapter 10-A, Pages 9-12	Chapter 10-A, Pages 9-12
Enclosure 1, Pages E-1-1 to E-1-2	Enclosure 1, Pages E-1-1 to E-1-2
Enclosure 1, CG HRSIC-1160	Enclosure 1, CG HRSIC-1160
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2020	Enclosure 1, CG HRSIC-2020
Enclosure 1, CG HRSIC-2025	Enclosure 1, CG HRSIC-2025
Enclosure 1, CG HRSIC-2030	Enclosure 1, CG HRSIC-2030
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2055	Enclosure 1, CG HRSIC-2055A
Enclosure 1, CG HRSIC-2070	Enclosure 1, CG HRSIC-2070
Enclosure 4, Pages E-4-1 to E-4-4	Enclosure 4 , Pages E-4-1 to E-4-9
Enclosure 8	Enclosure 8
Enclosure 9, Page E-9-5	Enclosure 9, Page E-9-5
Enclosure 10, Pages E-10-1 to E-10-2	Enclosure 10, Pages E-10-1 to E-10-2
Enclosure 11	Enclosure 11
Appendix A, Pages A-1 to A-2	Appendix A, Pages A-1 to A-2
Appendix A, Pages 13-14	Appendix A, Pages 13-14
Appendix B, Entire Appendix	Appendix B, Entire Appendix
Appendix C, Pages C-39-40 and C-49-50	Appendix C, Pages C-39-40 and C-49-50
Index, Pages I-5 to I-6	Index, Pages I-5 to I-6

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "PUBS/HRSIC" or by returning the comment form on Enclosure (11) of this manual.

R. J. WILLIAMSON

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ISC San Pedro	28
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HRSICNOTE 1000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-2 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. **PURPOSE.** This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. **ACTION.** Addressees shall enter page changes as indicated in the Procedure section of this Notice.

3. **SUMMARY.** A side bar in the margin marks the significant changes. Significant changes are summarized as follows:

   a. Changing of Basic Allowance for Quarters (BAQ) to Basic Allowance for Housing (BAH): Changes have been made throughout the manual to show BAH vice BAQ.

   b. PCS Departing Checklist, Page 2-A-3: Updated references on the PCS Departing Checklist.

   c. PCS Reporting Checklist, Page 2-A-5: Changed FSA Type 1 to FSH (Family Separation - Housing). Changed BAQ/VHA allowances to BAH allowance. Changed BAQ/VHA Housing Worksheet to BAH/Housing Worksheet.

   d. Overseas Transfer Checklist, Page 2-A-6: Added a step to the Overseas Transfer Checklist that requires the PERSRU supervisor to verify and sign the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN.

   e. Automatic Stops of Pay and Allowances, Pages 2-A-7 and 2-A-8: Added the new entitlement Partial BAS as an autostop on the day prior to the effective date of departure. Changed Partial BAQ to BAH Partial.

Continued on next page

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B	31	6	10	1	16	5		3	3	3	3	3	3	10	3	1		80	3	3	3	1	1	1	2	1
C	3	3		2	2	2	1		1		10	2	1	10		2	2	1		1		2	1	1	1	1
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f. How to prepare NATO Order Pages, 2-A-9 and 2-A-10: Removed the procedures on how to prepare a CENTO Order. These types of orders are no longer used.

g. Preparation of TAD Order (CG-4251) Block 12, Page 2-B-13: Added a requirement for the remarks block of the TAD Order. The maximum per diem rate (lodging and M&IE) for where the member will be TAD must be included in the remarks block of the TAD orders (if the member is going to draw per diem).

h. Accessions, Pages 3-A-1 through 3-A-5: Updated the procedures for accessions and added procedures for recalling RET-2 members.

i. Immediate and Priority Separation Processing, Pages 3-B-5 through 3-B-8: Updated the procedures for immediate separations and priority separations.

j. Expedited Separation E-Mail Message, Exhibit 3-B-1, Page 3-B-9: Changes have been made to Exhibit 3-B-1 to ensure that more detailed information is being sent on priority separation messages.

k. Requesting a Document Number and Accounting Data for Separation Orders, Exhibit 3-B-2 Page 3-B-12: Changes have been made to Exhibit 3-B-2 to have PERSRUs submit cancellation of document numbers and accounting data messages to COMDT (G-WR-1) vice COMDT (G-WR-3). Also changed E-mail messages to E-mail (so there is no confusion as to if an e-mail should be sent or a message).

l. Checklist for Reenlistment or Extension, Page 3-C-3: Added information that reserve members may reenlist up to 60 days prior to normal expiration of enlistment. Also updated the references on this checklist.

m. Immediate Enlistment in the Coast Guard Reserve Upon Discharge from the Regular Coast Guard, Page 3-C-9: Updated the reference block on this page.

n. Education and Qualifications, Page 4-C-12: When a member becomes qualified to wear the Company Commander Insignia, this qualification must be reported to the PERSRU for entry in PMIS/JUMPS. Procedures on how to report this to the PERSRU have been added to this section.

o. BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Pages 5-A-2 through 5-A-5: Changed the form name from BAQ/Dependency/Emergency Data and Validation (CG-4170A) to BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A). Changed Servicemen's Group Life Insurance to Servicemembers' Group Life Insurance.

p. Distribution of the CG-4170A, Page 5-A-6: The distribution for the CG-4170A has been changed. Originals are now sent to CGPC (adm-3) vice the PERSRU.

q. Servicemembers' Group life Insurance, Pages 5-A-7 to 5-A-13: This section has been changed from Servicemen's Group Life Insurance to Servicemembers' Group Life Insurance. This section also has been changed significantly to show more detailed information about designation of SGLI.

Continued on next page

r. Annual Verification of CG-4170A, Page 5-C-2: Updated procedures on the annual verification of CG-4170A.

s. Requesting Statements of Creditable Service, Pages 5-C-3 and 5-C-4: This section has been changed significantly to show more detailed information on the procedures for requesting a statement of Creditable Service/Sea Service.

t. Personnel Data Information File, Page 5-C-5: Added a note that if the units are not receiving PDIFs for their members, then they should contact their servicing PERSRU. The PERSRUs have the ability to send the PDIFs via e-mail (as an attachment) or by printing them off and sending them to the unit.

u. Transcript of Sea Service (TOSS), Page 5-C-8: Updated the procedures for requesting a TOSS.

v. Leave Authorization (CG-2519), Page 5-D-2: A Leave Authorization (CG-2519) is only required for sick leave in excess of 2 days.

w. Leave Carried over in Excess of 60 Days, Pages 5-D-4 and 5-D-5: Added this section to show what needs to be done if a member or multiple members of a unit are authorized to carry more than 60 days leave into a new fiscal year.

x. Correction/Changes of a Names, SSN, Date of Birth, or Minority Designator, Pages 5-D-17 and 5-D-18: Request for corrections or changes to names, SSN, date of birth, or minority designator are now forwarded to HRSIC (MAS).

y. TRICARE Selected Reserve Dental program, Pages 5-D-19 and 5 -D-20: Added a section about the new TRICARE Selected Reserve Dental Program.

z. Special Payments, Page 6-B-3: Added a note to this section that says a member will not be authorized a special payment by HRSIC for any type of bonuses (SRB, Enlistment Bonus, SELRES bonus).

aa. Significant Pay Shortage Procedures, Pages 6-B-5 through 6-B-6: PERSRUs are required to send E-mail using the format in Exhibit 6-B-1 to MAS/HRSIC when requesting a special payment in pay shortage cases.

bb. Advance payments, Pages 6-B-7 and 6-B-8: Changed the type of advances of BAQ/VHA to BAH. Also changed the type of advances of OHA interim Housing Allowance and BAQ to OHA Interim Housing Allowance and BAH Type II.

cc. Offline Payments for Advance Payments, Pages 6-B-8 and 6-B-9: PERSRUs are required to send E-mail using the format in Exhibit 6-B-2 to MAS/HRSIC when requesting an offline payment for advance payments.

dd. Death Gratuity Payments, Page 6-B-11: Updated the procedures on Death Gratuity payments.

Continued on next page

ee. Deployed Unit Money list Message (DUMLUM), Page 6-C-3: HRSIC (MAS) issues DUMLUM approximately 3 days before each payday while cutter is deployed vice 5 days.

ff. IDT Process, IDT Prerequisites, Drill Orders, Pages 6-D-2 through 6-D-4: Updated the reference block in these sections.

gg. Waiver of Pension/Disability Compensation or Retired Pay, Page 6-D-12: Updated the reference block in this section.

hh. Annual Reserve Retirement Point Statement, Pages 6-D-14 and 6-D-15: Added a section about the Annual Reserve Retirement Point Statement (CG-4175A).

ii. Basic Allowance for Subsistence (BAS) – Enlisted, Page 7-B-2: Changed the old partial BAS to Pro-Rated BAS.

jj. Family Separation Allowance, Pages 7-B-3 through 7-B-6: Updated procedures on how to report Family Separation Allowance.

kk. Overseas Housing Allowance (OHA), Page 7-B-7: Changed BAQ to BAH Type II and FSA-Type I to Family Separation – Housing (FSH).

ll. Information about the W-2 form and how to request a duplicate or corrected W-2 form, Pages 8-B-11 through 8-B-15: This section has been changed significantly to provide more detailed information about the W-2 form.

mm. Request for Federal or State Tax Adjustments, Pages 8-B-16 and 8-B-17: Added this new section to provide the procedures for members requesting a Federal or State Tax Adjustment.

nn. Collection of PMIS/JUMPS Overpayments, Pages 9-A-2 and 9-A-3: A Notice of Overpayment (NOP) letter will be provided by HRSIC (MAS) for each member with a debt of $751.00 or more vice $500.00 or more. If a member has an overpayment of less than $150.00 then this pay will be taken during the current month if sufficient net pay exists. If member has an overpayment of $150.00 to $750.00 then this pay will be scheduled for automatic repayment at a rate not to exceed $150.00 a month starting the next month.

oo. Collection of Other Debts, Page 9-A-4: The procedures for collection of other debts has been updated.

pp. Nonjudicial Punishment (NJP) Checklist, Page 10-B-2: Reports of NJP are now reported to COMDT (W-KS-5).

qq. Courts-Martial Checklists, Page 10-B-3: Reports of courts-martials are now reported to COMDT (W-KS-5).

rr. Reporting Civil Arrest or Conviction, Pages 10-B-13 and 10-B-14: Procedures on how to report a civil arrest or conviction have been updated.

Continued on next page

ss. Forms and Worksheets Enclosure (1): All of the forms and worksheets in Enclosure (1) that had BAQ information on them have been changed to show BAH vice BAQ. The following changes have also occurred:

- The BAQ/VHA Housing Worksheet has been renamed to BAH/Housing Worksheet and the VHA information has been removed.
- A block has been added to the PCS Departing Worksheet that requires the PERSRU supervisor to verify and sign if the member is going to PCS OUTCONUS.
- A block has been added to the PCS Reporting Worksheet that ask the member if he/she is entitled to, and meets the requirements of, FSH.
- A reminder for "Advancement Evaluations should be submitted on a member who is being advanced, when applicable" has been added to the Career Development Worksheet.
- The Family Separation Allowance Worksheet has been changed. FSA Type I has been removed and the worksheet has been updated with the new terminology for FSA (i.e., FSA Type II has been changed to FSA-R, FSA-S, and FSA-T).
- A block has been added to the TAD Travel Request/Authorization Worksheet that allows a funds-approving official to sign and date the worksheet, when applicable. Also, another block has been added to the worksheet that allows the unit to enter what the total cost of per diem is going to be.

tt. PDIF Enclosure (5): A better description of all the blocks on the PDIF have been added to this section. Also a description of all the codes that may be used on the PDIF have been added to this section.

uu. Award Codes Enclosure (10): Award code 'CC' has been added to this enclosure. It is the new Company Commander Insignia.

vv. Retirement Package, Appendix A: The Reserve Component Retirement Pay Account Worksheet (CG HRSIC-4700/R) has been added to this section.

ww. Instructions for the DD-1172 Appendix B, Page B-1: Updated information on the eligibility of Wards has been added to this section.

xx. Computation of Service, Appendix C, Pages C-25 to C-33: Added examples on how to compute date of rank on members entering the service with prior service.

yy. PDR System, Appendix D: Military Personnel Data Records (PDR) System, COMDTINST M1080.10C is cancelled and has been replaced by Military Personnel Data Records (PDR) system, COMDTINST M1080.10D.

zz. Traveler's Guide, Appendix E: The Traveler's Guide has been updated with current travel claim procedures and HRSICINST 4600.1 (procedures for faxing travel claims) has been added to this section.

aaa. You and Your LES, Appendix F, Pages F-4 and F-6: BAQ entitlement have been changed to BAH entitlements on block 25 of the LES. The new Partial BAS has been added as a common entitlement to the LES.

Continued on next page

4. PROCEDURE. Remove and insert the following pages:

Remove	Insert
Table of Contents Pages i-vii	Table of Contents Pages i-vii
1 Pages 11-12	1 Pages 11-12
2-A Pages 1-10	2-A Pages 1-10
2-B Pages 9-10	2-B Pages 9-10
2-B Pages 13-14	2-B Pages 13-14
3-A Pages 1-4	3-A Pages 1-5
3-B Pages 5-12	3-B Pages 5-12
3-C Pages 3-4	3-C Pages 3-4
3-C Pages 9-10	3-C Pages 9-10
4-C Pages 1-2	4-C Pages 1-2
4-C Page 11	4-C Pages 11-12
5-A Pages 1-12	5-A Pages 1-15
5-B Pages 1-4	5-B Pages 1-4
5-B Pages 11-12	5-B Pages 11-12
5-C Pages 1-8	5-C Pages 1-8
5-D Pages 1-17	5-D Pages 1-20
6-B Pages 1-10	6-B Pages 1-12
6-C Pages 3-4	6-C Pages 3-4
6-D Pages 1-4	6-D Pages 1-4
6-D Pages 9-13	6-D Pages 9-15
7-B Pages 1-5	7-B Pages 1-8
8-B Pages 1-2	8-B Pages 1-2
8-B Pages 11	8-B Pages 11-17
9-A Pages 1-4	9-A Pages 1-4
10-B Pages 1-6	10-B Pages 1-6
10-B Pages 13-14	10-B Pages 13-14
Enclosure 1 Pages E-1-1 to E-1-2	Enclosure 1 Pages E-1-1 to E-1-2
Enclosure 1 CG-5489A	Enclosure 1 CG-5489A
Enclosure 1 CG-5489B	Enclosure 1 CG-5489B
Enclosure 1 CG HRSIC-2000	Enclosure 1 CG HRSIC-2000
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Enclosure 1 CG HRSIC-2030	Enclosure 1 CG HRSIC-2030
Enclosure 1 CG HRSIC-2035	Enclosure 1 CG HRSIC-2035
Enclosure 1 CG HRSIC-2070	Enclosure 1 CG HRSIC-2070
Enclosure 5	Enclosure 5
Enclosure 7 Pages E-7-1 to E-7-4	Enclosure 7 Pages E-7-1 to E-7-4
Enclosure 10 Pages E-10-3 to E-10-4	Enclosure 10 Pages E-10-3 to E-10-4
Enclosure 10 Pages E-10-7 to E-10-8	Enclosure 10 Pages E-10-7 to E-10-8
Enclosure 11	Enclosure 11
Appendix A	Appendix A

Continued on next page

Remove	Insert
Appendix B Page B-1	Appendix B Page B-1
Appendix C Computation of Service Page C-1	Appendix C Computation of Service Page C-1
Appendix C Pages C-25 to C-44	Appendix C Pages C-25 to C-51
Appendix D (PDR Instruction)	Appendix D (PDR Instruction)
Appendix E (Travel Guide)	Appendix E (Travel Guide and HRSICINST 4600.1)
Appendix F Pages F-3 to F-6	Appendix F Pages F-3 to F-6
Index Pages I-1 to I-6	Index Pages I-1 to I-6

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "PUBS/HRSIC" or by returning the comment form on Enclosure (11) of this manual.

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HRSICNOTE 1000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-1 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. **PURPOSE.** This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. **ACTION.** Addressees shall enter page changes as indicated in the Procedure section of this Notice.

3. **SUMMARY.** The initial distribution of HRSICINST M1000.2A was printed using an outdated version of COMDTINST 1000.14A (Enclosure 6). This change corrects this error.

4. **PROCEDURE.** Remove and insert the following pages:

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R. J. WILLIAMSON

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SUPRTCEN Elizabeth City	18
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TRACEN Cape May (Recruits)	15
TRACEN Petaluma	20

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1	97JUL28	97JUL28	CGHRSIC (PRC)
2	98FEB11	98FEB11	CGHRSIC (PRC)
3	98NOV09	98NOV09	CGHRSIC (PRC)
4	98OCT01	98OCT01	CGHRSIC (PRC)
5	00MAY09	00MAY09	CGHRSIC (PRC)
6	00DEC01	00DEC01	CGHRSIC (PRC)
7	01JUL24	01JUL24	CGHRSIC (PRC)
8	02JUN16	02JUN16	CGHRSIC (PRC)
9	04JUN03	04JUN03	CGPSC(P&D)
10	04OCT04	06OCT04	CGPSC (P&D)

Note:

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TOPEKA KS 66683-3591

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1. Personnel and Pay Systems Overview

Responsibilities 1-2
Information Flow 1-4
Signature of Responsible Officer 1-6
Procedures for Authorizing Direct Access Command Users 1-8
Procedures for Designating Direct Access SPO and SPO Supervisor Users 1-12
Directives Referenced in this Manual 1-16
Forms Referenced in this Manual 1-19

2. Movement of Personnel

A. Permanent Change of Station

The PCS Transfer Process 2-A-2
PCS Departing Checklist 2-A-3
PCS Reporting Checklist 2-A-5
Overseas Transfer Checklist 2-A-6
Automatic Stops of Pay and Allowances 2-A-7
How to Prepare NATO Supplemental Orders 2-A-9

B. Temporary Duty

The Temporary Duty (TDY) Order 2-B-2
The Travel Claim Process and Responsibilities 2-B-4
Unit Travel System (UTS) Process 2-B-5
The Traveler 2-B-9
The Proxy 2-B-10
The Signature Proxy 2-B-11
The Approving Official (AO) 2-B-12
Personnel Service Center (PSC) 2-B-14
The CG Finance Center (FINCEN) 2-B-15
Records Maintenance 2-B-16
Audits 2-B-17
FAX Transmittal of PCS Travel Claims 2-B-20
Amendments to TDY Orders 2-B-21
Blanket Travel Orders 2-B-22
Group Travel Orders 2-B-23
Leave and Liberty Combined with TDY Travel 2-B-24
Pay Entitlements Affected by TDY 2-B-26
Preparation of TDY Order (CG-4251) Blocks 1-11 2-B-27
Preparation of TDY Order (CG-4251) Block 12 2-B-29
Preparation of TDY Order (CG-4251) Blocks 13-19 2-B-30

Continued on next page.

2. Transfer of Personnel, Continued

B. Temporary Duty (*Continued*)

Letter Travel Order (Example)	2-B-31
Authenticated Original Message/E-mail Order (Example)	2-B-32
Temporary Duty (TDY) Checklists	2-B-34
Reimbursement Methods	2-B-36
Submission of Manual Travel Claims	2-B-40
Rules for Claiming Official Phone Calls	2-B-43
Accounting Data	2-B-44

C. Active Duty for Training

The ADT Process	2-C-2
Amendments to ADT Orders	2-C-5
Preparation of Annual Screening Questionnaire	2-C-6

D. Active Duty Other Than Training

Projecting Cost of ADSW-AC Orders	2-D-2
Document ID's (TONO) for ADSW-AC Orders	2-D-3
Accounting Line Data for ADSW-AC Orders	2-D-4
How to Process an ADSW-AC Order	2-D-6

3. Accessions, Separations, and Reenlistments

A. Accessions

Process for Accessions	3-A-2
Types of Accessions	3-A-4
Recalled Retired Members	3-A-5

B. Separations

The Separation Process	3-B-2
Immediate Separation Processing	3-B-5
Priority Separation Processing	3-B-7
E-Mail Format for Immediate and Priority Separations (Exhibit 3-B-1)	3-B-9
Routine Separation Processing	3-B-10
Cancellation of Document Numbers and Accounting Data for Separation Orders (Exhibit 3-B-2)	3-B-12
Preparation of Separation Orders (Exhibit 3-B-3)	3-B-13
Enlisted to Cadet Status Processing	3-B-14
Regular Retirement Separations	3-B-15
Disability Retirement Separations	3-B-16
Checklist for Separations	3-B-17

Continued on next page

3. Accessions, Separations, and Reenlistments, Continued

B. Separations (*Continued*)

Checklist for RELAD 3-B-20
Checklist for Discharge 3-B-21
Checklist for Retirement 3-B-22
Reserve Retirement Separations 3-B-25

C. Continuance on Active Duty

Reenlistment and Voluntary Extensions/Reextensions 3-C-2
Checklist for Reenlistment or Extension 3-C-3
Retention of Members in a Pay Status other than Military Confinement 3-C-5
Retention of Members in a Non-Pay Status or in Military Confinement 3-C-6
Active Duty Extension of Reserves and Recall of Retirees 3-C-7
Immediate Enlistment in Coast Guard Reserve Upon Discharge from the Regular Coast Guard **3-C-8**
Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard **3-C-9**

4. Career Development

A. Enlisted Advancements

Headquarters Advancement Checklist 4-A-2
Commanding Officer Advancement Process 4-A-3
Commanding Officer Advancement Checklist 4-A-4

B. Warrant Officer Appointments

Warrant Officer Appointment Process 4-B-2
Warrant Officer Appointment Checklist 4-B-3
Warrant Officer Appointment Process (Reserve) 4-B-4
Warrant Officer Appointment Checklist (Reserve) 4-B-6

C. Education and Qualification

Training and Educational Accomplishments 4-C-2
Individual's Record of Small Arms Training 4-C-4
Veteran's Educational Assistance Program (VEAP) 4-C-5
Procedures to Enroll in MGIB for Certain VEAP Participants 4-C-7
Managing Competencies 4-C-11
Insignia 4-C-12

Continued on next page

5. Personnel Administration

A. Decedent Affairs

Designation of Beneficiaries and Emergency Contacts	5-A-2
Servicemembers' Group Life Insurance (SGLI)	5-A-4
SGLI Family Member Coverage	5-A-11
Casualty Reporting	5-A-15

B. Dependent Affairs

Dependency Information	5-B-2
BAH/Dependency Data Form	5-B-4
TRICARE Dental Plan	5-B-6
Applying for a DD Form 1173	5-B-10
Verification of Eligibility for the DD Form 1173	5-B-12
Reserve Family Member Identification Card	5-B-14
Information Concerning the DD Form 1172	5-B-17
Defense Enrollment Eligibility Reporting System (DEERS)	5-B-19

C. Maintenance of Personnel Information

Annual Verification of BAH/Dependency, Beneficiaries, SGLI, and Emergency Data	5-C-2
Requesting Statements of Creditable Service	5-C-5
Personnel Data Information File (PDIF)	5-C-8
Personnel Data Extract (PDE)	5-C-9
Security Clearances	5-C-10
Transcript of Sea Service (TOSS)	5-C-11

D. Miscellaneous

Leave Authorization (CG-2519)	5-D-2
Leave Carried over in Excess of 60 Days	5-D-4
Preparation of the DD Form 2 CG and DD Form 2	5-D-6
Personal Clothing and Equipment Record (AF Form 538)	5-D-9
Reporting Change in Mailing Address	5-D-11
Employment Verification	5-D-12
E-Resume	5-D-13
Assignment/Termination of Government Quarters	5-D-14
Permissive Travel Authorization	5-D-16
Corrections/Changes of Name, SSN, Date of Birth, or Minority Designator	5-D-17
TRICARE Selected Reserve Dental Program	5-D-19

Continued on next page

6. Payment of Personnel

A. Notification of Pay

Pay Delivery Method	6-A-2
Leave and Earnings Statement (LES)	6-A-3
Pay Notification for Members assigned to Deployed Cutters or Overseas/Isolated Units	6-A-5

B. Types of Payment

Regular Payments	6-B-2
Special Payments	6-B-3
Advance Payments	6-B-6
Death Gratuity Payments	6-B-9
Retired Pay Projection Request	6-B-10

C. Methods of Payment

Payment of Mobile Unit Personnel	6-C-2
Payment of Recruits	6-C-5
Requesting an Accelerated SRB Payment	6-C-6

D. Payment of Inactive Duty Reservists

IDT Prerequisites	6-D-2
The IDT process	6-D-4
Drill Orders	6-D-5
Example of IDT Drill Order Letter (To Unit)	6-D-7
Supervisor Endorsement on IDT Orders	6-D-8
Example of Amendment to IDT Drill Order Letter	6-D-9
IDT Certification Sheet	6-D-10
Waiver of Pension/Disability Compensation or Retired Pay	6-D-11
Annual Reserve Retirement Point Statement	6-D-13
Disability Processing	6-D-15

Continued on next page

7. Special Pay and Allowances

A. *Special Pay*

Aviation Career Incentive Pay (ACIP)	7-A-2
Hazardous Duty Incentive Pay (HDIP)	7-A-3
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	7-A-4
High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)	7-A-5
Special Pay-Duty Subject to Hostile Fire or Imminent Danger (HF/ID)	7-A-6
Funeral Honors Duty Allowance for Reservists	7-A-8
Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams	7-A-9

B. *Allowances*

Refund for Missed Meals – Discounted Meal Rate (DMR)	7-B-2
Family Separation Allowance (FSA)	7-B-3
Overseas Housing Allowance (OHA)	7-B-7
Family Subsistence Supplemental Allowance (FSSA)	7-B-8
Officer Uniform Allowance Claim Worksheet (CG PSC-5100)	7-B-10

C. *Savings Deposit Program*

Savings Deposit Program	7-C-1

D. *Bonuses*

Career Status Bonus (CSB)	7-D-1

8. Allotments, Bonds and Taxes

A. *Allotments and Bonds*

Allotments and Bonds	8-A-2
Allotment Checklist	8-A-4
Nonreceipt of an Allotment or Bond	8-A-5

B. *Taxes*

Federal Income Tax Withholding and Advance EIC	8-B-2
State Income Tax Withholding and State of Legal Residence	8-B-3
State Tax Listing	8-B-4
Income Tax Exclusion for Duty in Combat Zone	8-B-10
Information about the W-2 Form and How to Request a Duplicate or Corrected w-2 Form	8-B-12
Request for Federal or State Tax Adjustments	8-B-15

C. *Thrift Savings Plan (TSP)*

Thrift Savings Plan (TSP)	8-C-1

Continued on next page

9. In-Service Debt Collection

A. *Collections*

Collection of JUMPS Overpayments	9-A-1
Collection of Other Debts	9-A-4

B. *Remissions and Waivers*

Remissions	9-B-2
Waivers	9-B-3

10. Performance and Discipline

A. *Performance*

Administrative Remarks (CG-3307)	10-A-2
Reporting Medals and Awards	10-A-3
How to Complete the Enlisted Employee Review Worksheet for Units Without Direct Access Connectivity	10-A-4
Administrative Review of the Enlisted Employee Review Worksheet	10-A-9

B. *Discipline*

Nonjudicial Punishment (NJP) Checklist	10-B-2
Courts-Martial Checklist	10-B-3
Unauthorized Absence	10-B-5
Desertion	10-B-8
Reporting Return of Absentee or Deserter	10-B-11
Reporting Civil Arrest or Conviction	10-B-14

11. Reserve Mobilization

The Mobilization Process	11-2
Types of Mobilization	11-4
Mobilization Orders	11-5
Pay Entitlements When Mobilized	11-7
Travel Entitlements When Mobilized	11-16
Other Entitlements When Mobilized	11-20
Mobilization Checklist	11-22
SPO Mobilization Procedures	11-25
Recall of Retired Members	11-30
Travel Claims During Mobilization Status	11-33
Monthly Verification Procedures	11-44
Extension of Mobilization Orders	11-45
The Demobilization Process	11-47
Demobilization Checklist	11-49
Medical Readiness	11-50
SPO Demobilization Procedures	11-51

Enclosures and Appendices

Enclosure (1) - Forms and Worksheets

Enclosure (2) - Standard Abbreviations for Transfer of Personnel

Enclosure (3) - Special Instructions for Block 12 of the CG-4251 (TDY Travel Order)

Enclosure (4) - Standard Separation Letters

Enclosure (5) - Vacant

Enclosure (6) - Administrative Remarks Entries

Enclosure (7) - Casualty Reporting Examples

Enclosure (8) - Direct-Access Procedures

Enclosure (9) - State & U.S. Possession/Foreign Country Abbreviation Codes

Enclosure (10)- Vacant

Enclosure (11)- Comment Form

Appendix (A) - Vacant

Appendix (B) - Reserved for DODINST 10000.13 (series), Identification (ID) Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals, Instructions for the DD-1172 (Application for Uniformed Services ID Card)

Appendix (C) - Computation of Service

Appendix (D) - Reserved for PDR System (distributed by COMDT (G-WR-3)

Appendix (E) - Vacant

Appendix (F) - LES Information

Chapter Overview

Introduction

This chapter introduces the personnel and pay systems in use by the Coast Guard. Responsibilities, which incorporate data input, communications guidelines, and signature authority, are also provided in this chapter.

In this chapter

Topic	See Page
Responsibilities	1-2
Information Flow	1-4
Signature of Responsible Officer	1-6
Procedures for Authorizing Direct Access Command Users	1-8
Procedures for Designating Direct Access SPO and SPO Supervisor Users	1-12
Directives Referenced in this Manual	1-16
Forms Referenced in this Manual	1-19

Responsibilities

Introduction Direct Access exists as a part of the overall Coast Guard Personnel System. Six players (entities) within this system have a responsibility to ensure the system functions properly.

Entities These six entities interact to perform the personnel and pay functions for the Coast Guard. Below are their responsibilities such as, but not limited to:

Entity	Responsibility
Member	• Report changes in mailing address (for bonds and allotments too). • Understand the LES and report any discrepancies via the chain-of-command. • Understand the Retirement Point Statement and report any discrepancies via the chain-of-command (reservists). • Report changes in family member's status. • Report occasions of moving into or out of government owned or leased quarters. • Report changes in allotments or direct deposit. • Advise CO of reenlistment/extension intentions. • Submit Electronic E-Resume.
Unit CO	• Complete E-Reviews and ensure they are completed no later than 30 days after the reporting period. • Authorize and submit Leave Authorizations. • Endorse E-Interviews. • Conduct predischarge interviews. • Grant interim security clearance, request final security clearance from DOT Adjudication Facilities or grant/suspend access to classified information if required and conduct the briefings/debriefings. • Maintain Personnel Data Records (PDRs) as per PDR Manual (COMDTINST M1080 (series)). • Provide data in support of personnel/pay actions for members. • Review orders for attached personnel (Airport Terminal). • Maintain Security for Direct Access by keeping on file the original CG PSC 7421/2 and checking the Department Role Query on a quarterly basis to confirm access levels for unit personnel.

Continued on next page

Responsibilities, Continued

Entities (cont'd)

SPO	• Provide information feedback to the unit. • Investigate and resolve personnel and pay problems. • Ensure that required transactions are submitted within 2 working days of an event affecting a member's pay. • Ensure that units assisting input have proper training and clear understanding of job required of them (Memo Of Understanding).
PSC	• Provide feedback to SPOs when transaction errors are correctable. • Take corrective action on errors which cannot be corrected by SPOs. • Provide written notice of due process rights to members who are overpaid. • Provide timely and accurate personnel and pay service to all members of the Coast Guard. • Administer leave and retirement point accounting for active and reserve military personnel. • Arrange for settlement of claims on behalf of deceased or separated members and collect out of service debt. • Process application for allotments and garnishments for certain support obligations as set forth in 5 CFR 581, 32 CFR 63, and 33 CFR 50. • Administer the SWE program and provide enlisted advancement lists to CGPC for official issuance. • Develop written procedures to support all areas of personnel and pay policy. • Process Travel Claims.
Commander Coast Guard Personnel Command (CGPC)	• Issue normal promotion/advancement authorizations and eligibility list. • Approve retirements. • Consider all personnel waivers. • Issue assignment orders.
CG Institute	• Distribute and score Coast Guard correspondence courses. • Distribute educational funding. • Military credit evaluation.

Information Flow

Information

Information required by Direct Access is generated by an event occurring to a member. After the event occurs there are different steps that need to be taken to ensure proper input into Direct Access.

Information flow from the member

This is an example of how information should flow from the member to Direct Access.

Stage	Who Does It	What Happens
1	Member	Event occurs (e.g., marriage) Event is reported to the unit by submitting appropriate forms or worksheets of this manual and updating any information in Direct Access.
2	Unit	Insures that member has provided all necessary information in accordance with the instructions from the appropriate section of this manual or from the reverse side of the worksheet and reports the event to the SPO.
3	SPO	Reviews PDR; contacts unit for additional information if needed and inputs appropriate information in the payroll system.
4	PSC	Processes the data for the event, updates personnel and pay entitlements, and provides feedback on the LES and PDE.

Continued on next page

Information Flow, Continued

Communication between the member, unit, and the SPO

There are different ways in which the member, unit and SPO can communicate. It is up to each unit and SPO to establish the most preferred method in which to communicate with their customer.

Type	Method	Uses
1	Mail	Not as fast as types 2-4, but when urgency is not a factor it is an efficient method of getting information to and from the unit (e.g., worksheets).
2	E-Mail	Very effective form of information exchange. It can be traced and other documents can be attached. Depending where sent, it can be received very quickly. **Note**: Members or units that do not have access to the Coast Guard Data Network (CGDN) for the use of E-Mail can use the Coast Guard's Internet E-Mail gateway to send and receive E-Mail between themselves and Coast Guard units if they have access to Internet E-Mail. Internet gateway users should be advised that this method does not offer the security of the CGDN and that information of a highly personal nature or information protected by the Privacy Act should not be transmitted through the gateway. Consult COMDTNOTE 5270, Policy and Procedures for the Electronic Mail Gateway to the DOT and Worldwide Internet Network, for more information.
3	Telephone	Fastest form of communication, Limitation: No tracking ability.
4	FAX	A fast method of communication. A good way to track information when source document is required to be cited.

Signature of Responsible Officer

Discussion

The requirement to sign various forms and worksheets in this manual and to electronically sign UTS and Direct Access transactions are necessary to affirm and give legal credence to the information contained on the form or in the transaction. The Commanding Officer (CO) should avoid situations where the responsible officer lacks the knowledge or time to validate the information and may sign as a formality.

Reference

- COMDTINST M5000.3 (series), CG Regulations
  - Chapter 7-1-8, Administration of Oaths
  - Chapter 7-1-9, Signing Official Correspondence
- COMDTINST M7210.1 (series), Certifying and Disbursing Manual

Authority to sign forms and worksheets

The CO may authorize in writing for officers, Chief Petty Officers, First Class Petty Officers, and Second Class Petty Officers to sign forms and worksheets "by direction", subject to the following restrictions.

- Only officers, the Master Chief Petty Officer of the Coast Guard (MCPO-CG), Commandant designated Command Enlisted Advisors, and designated recruiting office Chief Petty Officers and Petty Officers may administer enlisted oaths and sign enlistment contracts.
- Only Officers, the MCPO-CG, Commandant designated Command Enlisted Advisors, and permanently assigned Enlisted Officers-in-Charge may administer reenlistment and extension of enlistments oaths and sign the appropriate reenlistment or extension document.
- The "by direction" authority granted to Second Class Petty Officers (PO2) shall normally be limited to routine transactions such as leave and personnel transactions. PO2s shall only be given authority to sign specific Direct Access transactions "by direction" in cases where there is a shortage of Officers, Chief Petty Officers, and First Class Petty Officers.
- Only the CO may sign the PCS Departing Worksheet (CG-PSC-2000) or the Advances Worksheet (CG PSC-2010) when the member is requesting Advance Pay & Allowances or Advance Pay with liquidation period in excess of 12 months.

Continued on next page

Signature of Responsible Officer, Continued

Authority to sign Pay and Personnel Transactions

The Commanding Officer (CO) of a unit with a SPO must nominate at least one Officer, Chief Petty Officer, First Class Petty Officer, Second Class Petty Officer, or Civilian employee in grade GS-7 or above, for designation by PSC (MAS) as a Payment Approving Official (PAO).

- Only properly designated PAOs have the authority to approve Direct Access transactions for transmission to PSC.
- Only properly designated PAOs (see Payment Approving Officials' responsibilities and liabilities below) may have Supervisor (CGHRSUP) capability in Direct Access.

Payment Approving Officials' responsibilities and liabilities

It is Coast Guard Policy that PAOs have the same level of financial liability as an Authorized Certifying Officer (ACO), as described in Chapter 1 of Certifying and Disbursing Manual. Thus, if a PAO incorrectly certifies a document to an ACO that directly results in an erroneous or improper payment, the PAO is responsible for the error. PAOs remain fully accountable to the Coast Guard and may be found to have pecuniary liability; and/or may have their personal evaluations (OER/CIV Performance Appraisal/EPEF) impacted by such action by an official in their chain with evaluation approving authority.

Designation Procedure for PAO

- COs will request designations, revocations or terminations for HRS officials by submitting a CG PSC-7210 form (Designation as Payment Approving Official) to PSC (MAS). If the CG-PSC-7210 requests designation of a Second Class Petty Officer as a PAO, the CO shall attach to the CG PSC-7210 a letter explaining what PAO authority will be granted to the Second Class Petty Officer (e.g., authority to sign leave and personnel transactions only).
- PSC is the final approving authority for the designation of PAOs at SPOs or an authorized unit. After receipt and review of the CG PSC -7210, PSC (MAS) will certify the PAO designation. The original form will be returned to the local command along with a detailed brochure outlining the duties, responsibilities, and liabilities of the PAO.

Procedures for Authorizing Direct Access Command Users

Introduction

Access to command functions of Direct Access is limited to authorized personnel -- *Command Users*. This section provides guidelines and procedures for designating Command Users.

The Command User

The Command User role in Direct Access provides the user with the ability to access the Self-Service for Command functions of the system. It is a powerful, multipurpose role, intended for use by trusted, mature and responsible members of the command cadre. The Direct Access Command User has the ability to:

- Schedule and approve (for payment) reserve IDT drills.
- Initiate and view enlisted evaluations (employee reviews).
- Access the Airport Terminal, which provides a list of personnel in receipt of orders to or from the unit and the ability to view, modify and print travel orders.
- Generate and view member competency reports.
- Print BAH/Dependency and Emergency Contacts reports.
- View command information including roster and personnel allowance list.
- View member service record information (CG Member Info) including assignment history, competencies, training history, contact telephone numbers and address.
- Command Users must be designated by the unit Commanding Officer/Officer in Charge or Executive Officer/Executive Petty Officer.

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Procedures for Authorizing Direct Access Command Users,
Continued

Choosing Command Users

Each unit must designate at least one Command User. Additional Command Users should be designated based on the need to access the information listed above.

Commanding Officers may designate as many Command Users as necessary to meet the unit's needs and maintain a smooth workflow. However, designations of Command Users in pay grades below E-6 are subject to review and approval by PSC and COMDT (G-WRI). There are alternative access roles available for personnel who do not need access to all of the Command User functions (see below).

Command User Responsibilities

Direct Access, based on the Operator ID, allows a Command User access to all command functions. Any Command User has the ability to enter comments and approve an employee review, enter IDT drills, or view transfer information. Commanding Officers should clearly define an individual's role when making Command User designations.
When you designate Command Users provide them with the answers to these questions:
Does the individual have your authorization to:

- View enlisted evaluations?
- Initiate enlisted evaluations?
- View pending transfer information?
- Run reports and rosters?
- Input reserve drill/ADT information?

Continued on next page

Procedures for Authorizing Direct Access Command Users,
Continued

Alternatives to Command User Access

Granting full command access may not always be necessary or appropriate. Consider granting one or more of these roles in lieu of full command access.

Role	Functions	Suggested users
Airport Terminal Only (CGAIRTRM).	Allows access to the Airport Terminal	Housing Officers/staffs and Relocation Specialists.
Employee Review Only (CGEMPREV)	User can initiate, route or approve enlisted employee reviews	Supervisors (E-6 and above) and Marking Officials. **Note**: Employee Reviews may be initiated using the worksheets (CG-3788a,b or c). A Command User can handle final data entry in the system. It is not necessary for every person in the chain of command to use Direct Access to complete an employee review. Use this rule to determine if you should authorize someone at your command Employee Review Access: *If the evaluation was being completed using the old paper-process, would that person's name and signature appear on the form as the supervisor, marking official or approving official?* If **yes**, the person should be authorized access in Direct Access. If **no**, the person's input on the evaluation may be captured using the Employee Review worksheets.
Field Admin (CGFIELDADM)	User can view and modify member competencies, run reports, view dependency data, print BAH/Dependency Data and Emergency Contacts reports, view and print travel orders, and most other non-pay related personnel actions.	Unit administrative staff. **Note**: Applications must be approved by the servicing SPO and be accompanied by a Memorandum of Understanding (MOU). This is to ensure the SPO is aware that the unit will be assuming responsibility for entering competency data and prevents duplicate data entry. A template for the MOU is included with the access form.
Global Workforce Inquiry Solution (CGGWIS)	Allows **view-only** access to member and unit data. Includes ability to access the Airport Terminal.	HR Managers (CO/OIC, XO/XPO, Admin Officer, HQ/CGPC Staffs).

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Procedures for Authorizing Direct Access Command Users,
Continued

Designation Procedure

To designate a Command User (or other role types), utilize CG PSC Form 7421/2.

1. Complete the first section (Blocks 1 through 7) of the form.
2. The authorizing official's name, rank, title and phone number must be printed or typed in Block 8 and the block must be signed.
   Note: "By direction" is not authorized. Only the CO/OIC, XO/XPO, or HQ/CGPC/AREA/MLC/DIST Branch Chief may authorize Direct Access.
   If the applicant is the CO/OIC, then they may sign their own application.
3. Fax the form to PSC's Customer Care Branch at: (785)-339-3772.
4. PSC Customer Care Branch will enable Command User privileges in Direct Access and notify the user, via email, when completed. Forms are *usually* processed within 3-working days of receipt.

Retain the original CG PSC Form 7421/2 until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked.

Terminating Privileges

To terminate Command User designation and privileges, have the member sign the acknowledgment in Section 3 of CG PSC Form 7421/2 and fax to PSC Customer Care Branch at (785) 339-3772.

Procedures for Designating Direct Access SPO and SPO Supervisor Users

Purpose

This section provides policies and procedures for granting Human Resource Site (HRS) access to Direct Access for users assigned to Servicing Personnel Offices (SPOs).

HRS Access Defined

HRS access permits a Direct Access user to create and transmit transactions, which effect changes in a member's pay entitlements. HRS users can also access and maintain non-payroll data, such as competencies, awards, enlisted employee reviews, etc. HRS access duplicates the Self-Service for Employees and Self-Service for Commands roles to allow users at Personnel Reporting Units (SPOs) to service members and commands that do not have access to Direct Access.

HRS Supervisor (HRSUP) role users have the ability release Direct Access transactions that require approval and to override software edits.

HRS User Responsibility and Liability

It is Coast Guard policy that HRS users have the same level of financial liability as an Authorized Certifying Officer (ACO). ACO liability is described in Chapter 1 of the Certifying and Disbursing Manual. If an HRS user incorrectly certifies a document to an ACO (the ACO for military pay is PSC Topeka) that directly results in an erroneous or improper payment, the HRS user is responsible for the error. HRS users remain fully accountable to the Coast Guard and may be found to have pecuniary liability; and/or may have their personal evaluations (OER/CIV Performance Appraisal/Employee Review) impacted by such action by an official in their chain with evaluation approving authority.

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Procedures for Designating Direct Access SPO and SPO Supervisor Users, Continued

Field Unit HRS Access

Personnel at field units may be granted HRS access, provided the following criteria are met and the unit has entered into a Memorandum of Understanding with the servicing SPO, for the transfer of data input responsibility.

- Must be a YN or CWO (PERS).
- If YN2 or YN3, must have access to and be directly supervised by a Subject Matter Expert (someone knowledgeable in pay matters).
  - Senior YN (E-6 and above).
  - CWO (PERS).
  - Full time Personnel/Admin Officer.

- The HRS Supervisor role will not be granted to users at field units. Units will contact the servicing SPO to coordinate input of transactions that require approval or the override of system edits.

Alternatives to HRS Access for Field Unit Personnel

Granting HRS access may not always be necessary or appropriate. Consider granting one or more of these roles in lieu of HRS access.

Role	Functions	Suggested users
Airport Terminal Only (CGAIRTRM).	Allows access to the Airport Terminal	Housing Officers/staffs and Relocation Specialists.
Employee Review Only (CGEMPREV)	User can initiate, route or approve enlisted employee reviews	Supervisors (E-6 and above) and Marking Officials. **Note**: Employee Reviews may be initiated using the worksheets (CG-3788a,b or c) from enclosure (1) to the Personnel and Pay Procedures Manual. A Command User can handle final data entry in CGHRS. It is not necessary for every person in the chain of command to use Direct Access to complete an employee review.
Field Admin (CGFIELDADM)	User can view and modify member competencies, run reports, view dependency data, print BAH/Dependency Data and Emergency Contacts reports, view and print travel orders, and most other non-pay related personnel actions.	Unit administrative staff. **Note**: Applications must be approved by the servicing SPO and be accompanied by a Memorandum of Understanding (MOU). This is to ensure the SPO is aware that the unit will be assuming responsibility for entering competency data and prevents duplicate data entry. A template for the MOU is included with the access form.
Global Workforce Inquiry Solution (CGGWIS)	Allows **view-only** access to member and unit data. Includes ability to access the Airport Terminal.	HR Managers (CO/OIC, XO/XPO, Admin Officer, HQ/CGPC Staffs).

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HRS Role User Designation Criteria

Introduction

This section provides guidelines for determining who will be granted HRS or HRS Supervisor access at SPOs and field units.

SPO Staffs

Active duty, reserve and civilian employees permanently assigned to a position in one of the existing SPOs may be granted HRS access in Direct Access. Yeomen, temporarily assigned to a SPO, may be granted access.

SPO Supervisors/ Payment Approving Officials

Certain Direct Access entitlements transactions require review and approval before they can be released for processing. Approval of these transactions is limited to properly designated Pay Approving Officials (PAOs). PAOs are assigned the HRS Supervisor (HRSUP) role in Direct Access.

Commanding officer of a unit with a SPO must nominate at least one officer, chief petty officer, first class petty officer, or civilian employee in grade GS-7 or above, for designation by PSC (MAS) as a Payment Approving Official (PAO).

In addition to reviewing and approving transactions, HRS Supervisors have the ability to override Direct Access program edits. This allows the user to "force" a transaction to be saved, even if it does not meet the criteria established for an entitlement to be paid. This functionality exists because the system edits are closely tied to the member' assigned position and department in Direct Access. Therefore, the edits prevent some transactions, which are otherwise appropriate, from being entered into the system. An example of this would be attempting to put in a sea pay change on a member who has departed, PCS, from a sea pay eligible unit to a unit where sea pay is not authorized. Direct Access would normally prevent entry of this type of transaction because the member's current unit is not authorized sea pay.

Continued on next page

HRS Role User Designation Procedure

Introduction

This section provides the procedure for designation HRS Role Users.

Designation Procedure

To designate an HRS user, utilize CG PSC Form 7421/2.

1. Complete the first section (Blocks 1 through 7) of the form at the unit level.
2. The authorizing official's name, rank, title and phone number must be printed or typed in Block 8 and the block must be signed.
   - Note that for field unit access "By direction" is not authorized. Only the CO/OIC or XO/XPO may authorize Direct Access. The SPO supervisor may sign applications from users within that SPO.
   - Users at field units should include a copy of the Memorandum of Understanding.
   - HRS Supervisor applicants should include a copy of their PAO designation letter (PSC acknowledges that we have these letters on file. However, by having the applicant include it with their access form, the authorizing official is assured the applicant is a PAO. Including the letter with the application also reduces processing time at PSC).
3. Fax the form to PSC's Customer Care Center at: (785)-339-3772.
4. The PSC Customer Care Center will enable HRS privileges in Direct Access and notify the user, via email, when completed. Forms are *usually* processed within 3-working days of receipt.
5. HRS role users will receive a memo, via the chain of command, outlining the duties, responsibilities, and liabilities.

Retain the original CG PSC Form 7421/2 until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked.

Directives Referenced in this Manual

Introduction

Several manuals are referenced throughout the Personnel and Pay Procedures Manual. These manuals usually set policy for the procedure being described. You will need to refer to these references from time to time.

Directives referenced

Directives used in this manual and their abbreviation. Current online versions can be found at: http://cgweb.uscg.mil/G-C/G-CCS/G-CIT/G-CIM/DIRECTIVES/WELCOME.HTM

Number	Long Title	Abbreviation
COMDTINST M1000 (series)	CG Personnel Manual	PERSMAN
COMDTINST 1000.14	Preparation and Submission of Administrative Remarks (CG-3307)	Pg-7 Instruction
COMDTINST M1001 (series)	Reserve Policy Manual	RPM
COMDTINST 1020 (series)	Allowable Weight Standards for Coast Guard Military Personnel	Weight Instruction
COMDTINST M1080 (series)	Military Personnel Data Records (PDR) System Manual	PDR Manual
COMDTINST M1414 (series)	Enlisted Performance Qualifications Manual	Quals Manual
COMDTINST M1414 (series)	Coast Guard Enlisted Qualification Codes Manual	Qual Code Man
COMDTINST M1500 (series)	Coast Guard Training and Education Manual	Training & Ed Man
COMDTINST M1650 (series)	Coast Guard Medals and Awards Manual	Medals & Awards Manual
COMDTINST M1900 (series)	Certificate of Release or Discharge from Active Duty, DD Form 214	DD 214 Manual
N/A	Separation Program Designators Handbook	SPD Handbook

Continued on next page

Directives Referenced in this Manual, Continued

Directives referenced (cont'd)

Number	Long Title	Abbreviation
COMDTINST 4600 (series)	Travel Charge Card Program	Charge Card Instruction
COMDTINST M4600 (series)	Coast Guard Supplement to the Joint Federal Travel Regulations Volume 1	CGS-JFTR
COMDTINST 4650 (series)	Passports and Visas	Passports Instruction
COMDTINST M5000 (series)	United States Coast Guard Regulations	CG Regs
COMDTINST M5260 (series)	Privacy (Coast Guard) and Freedom of Information Acts Manual	Privacy Act Manual
COMDTINST 5310 (series)	Measuring the Contribution of Reserve Duty	None
COMDTINST M5320 (series)	Enlisted Billet Manual	Enlisted Billet Manual
COMDTINST M5320 (series)	Commissioned and Warrant Officer Billet Manual	Officer Billet Manual
COMDTINST M5510 (series)	Information Security Program Manual	INFOSEC
COMDTINST M5520 (series)	Personnel Security Program Manual	PERSEC
COMDTINST M5810 (series)	Military Justice Manual	MJM
COMDTINST M7210 (series)	Certifying and Disbursing Manual	
COMDTINST 7220 (series)	Reenlistment Bonus Programs Administration	PERSMAN
COMDTINST M7220 (series)	U. S. Coast Guard Pay Manual	PAYMAN
COMDTINST 7220 (series)	Management and Administration of Aviation Incentive Pays	Flight Pay Instruction

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Directives Referenced in this Manual, Continued

Directives referenced
(cont'd)

Number	Long Title	Abbreviation
COMDTINST M10470 (series)	Coast Guard Rescue and Survival Systems Manual	CG Rescue Manual
COMDTINST M11101 (series)	Coast Guard Housing Manual	Housing Manual
PSCINST M1000 (series)	Personnel and Pay Procedures Manual	PPPM
FINCENINST M7000.1	CG Finance Center, Standard Operation Procedures http://www.fincen.uscg.mil/sop.htm	FINCEN SOP
JFTR Vol 1	Joint Federal Travel Regulations DOD Travel Regulations	JFTR

Forms Referenced in this Manual

Introduction

Several forms are referenced throughout the Personnel and Pay Procedures Manual. The forms listed below and the forms and PSC worksheets referenced in this manual are needed to complete the action described.

CG PSC forms and worksheets are available on the internet at http://www.uscg.mil/hq/psc/forms/.

Other forms referenced in this Manual are available in USCG Electronic Forms on SWSIII or on the Internet at http://www.uscg.mil/ccs/cit/cim/forms1/.

Forms referenced

Forms referenced in this manual and corresponding form numbers.

Form Number	Form name
AF Form 538	Personal Clothing and Equipment Record
CG-2519	Leave Authorization
CG-2556	Move-In Housing Allowance Claim Form
CG-3029A	Individual's Record of Small Arms Training
CG-3301B	Agreement to Extend/Re-extend Enlistment
CG-3307	Administrative Remarks
CG-3453	Request for ADT Orders
CG-3853	Personal Effects Inventory and Disposition
CG-4057	Chronological Record
CG PSC-2020	Dependency Worksheet
CG PSC-2020D	Designation of Beneficiaries
CG-4178	Good Conduct Certificate
CG-4251	Military Temporary Additional Duty (TDY) or Civilian Temporary Duty (TD) Request and Travel Order
CG-4902	Personnel Data Extract
CG-4910	Report of Offense and Disposition
CG-5131	Standard Travel order for Military Personnel
CG-5209	Leave and Earnings Statement

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Forms Referenced in this Manual, Continued

Forms referenced
(cont')

Form Number	Form name
CG-5274	Personnel Security Record
CG-5475	Clothing and Small Stores Checkage
CG-5489	Waiver/Remission Application
CG-5489B	Financial Statement
CG-5530	Advancement Certificate to SN/FN
CG-9556	Acceptance and Oath of Office
DD-214	Certificate of Release or Discharge From Active Duty (Computer Generated)
DD-214WS	Certificate of Release or Discharge From Active Duty (Computer Generated)
DD-Form 2 (CG)	Armed Forces Identification Card
DD Form 4/1	Enlistment/Reenlistment Document Armed Forces of the United States
DD Form 139	Payment Adjustment Authorization
DD Form 216 CG	Petty Officer Appointment Certificate
DD Form 216 CGR	Reserve Petty Officer Appointment Certificate
DD Form 1173	Uniformed Services ID and Privilege Card
DD Form 397	Claims Certificate and Voucher for Death Gratuity Payment
DD Form 553	Deserter/Absentee Wanted by the Armed Forces
DD Form 616	Return of Absentee
DD Form 803	Certificate of Termination
DD Form 1172	Application for Uniformed Services ID Card (DEERS Enrollment)
DD Form 1173-1	Reserve Family Member Identification Card
DD Form 1337	Application for Shipment and/or Storage of Personal Property
DD Form 1351-2	Travel Voucher

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Forms Referenced in this Manual, Continued

Forms referenced
(cont'd)

Form Number	Form name
DD Form 1475	Basic Allowance For Subsistence Certification
DD Form 2058 CG	State of Legal Residence Certificate
DD Form 2329	Record of Trial by Summary Courts-Martial
DD Form 2367	Individual/Overseas Housing Allowance
DD Form 2648	Pre-separation Counseling Checklist
IRS Form W-2	Wage and Tax Statement
IRS Form W-4	Employee's Withholding Allowance Certificate
IRS Form W-5	Federal Earned Income Credit
PHS 731	International Certificate of Vaccination
NAVPERS 1330/2	Navy Sponsor Notification
SF-1038	Advance of Funds Application and Account
SGLV-8285	Request for Insurance (Servicemembers' Group Life Insurance)
SGLV-8286	Servicemembers' Group Life Insurance Election Certificate
VA Form 4-5281	Refund of Educational Contributions

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Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for transferring personnel. This chapter provides checklists, guides, and information required to complete this task.

In this chapter

Section	Description	See Page
A	Permanent Change of Station - PCS	2-A-1
B	Temporary Additional Duty - TDY	2-B-1
C	Active Duty for Training - ADT	2-C-1
D	Active Duty Other than Training - ADOT	2-D-1

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Section Overview

Introduction

This section will guide you through the Permanent Change of Station (PCS) process.

In this section

Topic	See Page
The PCS Transfer Process	2-A-2
PCS Departing Checklist	2-A-3
PCS Reporting Checklist	2-A-5
Overseas Transfer Checklist	2-A-6
Automatic Stops of Pay and Allowances	2-A-7
How to Prepare NATO Supplemental Orders	2-A-9

The PCS Transfer Process

Introduction The transfer process depends on communication between many participants. This process is broken down into stages identifying what needs to be completed and who is responsible.

Process This is the process.

Stage	Who Does It	What Happens
1	Member	Prepares E-Resume in Direct Access.
2	Issuing Authority	Issues transfer order in Direct Access (Airport Terminal).
3*	SPO	Notifies unit when order is received if unit does not have access to Direct Access.
4*	Member/Unit	• Completes PCS Departing/Separation Worksheet (PSC-2000); PSC Travel Entitlements Worksheet, (PSC-2003) and forward to the servicing SPO. If attending "A" school complete a Departing TDY or PCS/TEMDUINS to "A" School Worksheet (PSC-2001) and forward to the SPO. • Schedules appointment with servicing Transportation Officer (TOPS site) to arrange shipment of HHG.
5*	SPO	• Approves and prints Direct Access orders.
6*	PAO/PSC (TVL)	• If requested, will process travel advances (preferably by facsimile).
7*	TO (TOPS site)	• Counsels member and arranges shipment of HHG.
8*	Unit	• Endorses order upon departure.
9*	SPO	• Approves and transmits PCS Departing Transactions.
10	Member	Reports to new unit, prepares: • Travel Voucher, DD-1351-2 (for self and dependents). • Updates information (e.g. email, address, Emergency Contacts) in Direct Access . • PCS Reporting Worksheet (CG PSC-2005). • BAH/Housing Worksheet (CG PSC-2025).
11	New Unit	• Endorses order with date and time reported and messing status (e.g. REG BAS, ENL BAS, ENL BAS MINUS DISC MEAL RATE). • Forwards the reviewed travel claim(s) with original order/s to PSC (TVL). • Forwards worksheets to SPO w/ copy of the endorsed order.
12	SPO	• Completes PCS Reporting Transactions.
13	PSC (TVL)	• Processes travel claim(s).

*The SPO and unit are to build a relationship that ensures these procedures are completed using the most expeditious means possible.

PCS Departing Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/SPO in completing all necessary tasks required for departing PCS.
This job aid is to be reproduced locally.

Departing Checklist

Action upon receipt of a PCS Order.

Step	Action	Reference	Date
1	Ensure member is eligible for transfer	PERSMAN, 4-B	
2	Ensure member meets obligated service requirements for transfer	PERSMAN, 4-B-6	
3	Ensure member meets requirements for overseas transfer (if applicable) utilizing this job aid	PPPM, 2-A-6	
4	Complete member screening for assignment to semi-isolated units (if applicable) and administrative assignments	PERSMAN, 4-E	
5	Complete NAVPERS 1330/2 Navy sponsor Notification for mandatory sponsor	PERSMAN, 4-A-15.b.7	
6	Counsel member on PCS travel entitlements, when completing PCS Entitlements Worksheet (CG PSC-2003)	CGS-JFTR, Chapter 5	
7	Verify member's entitlement to FSH and/or FSA-R and BAH allowances	PAYMAN, 3-F	
8	Complete PCS Departing/Separation Worksheet (CG PSC-2000), and PCS/TEMDUINS to "A" school worksheet (CG PSC-2001) if applicable	PPPM, Encl. (1)	
9	Complete an Enlisted Employee Review (EER) Mandatory - if on the date of detachment 92 or more days have elapsed since the last EER was completed Optional - if on the date of detachment less than 92 days have elapsed since the last EER was completed	PERSMAN, 10-B-5	

Continued on next page

PCS Departing Checklist, Continued

Departing Checklist (continued)

Step	Action	Reference	Date
10	Review PDR	PDR Manual	
11	Ensure member has a valid ID card	PPPM, 5-D-6	
12	Verify that member's dependents are enrolled in DEERS	PPPM, 5-B-17	
13	Ensure member meets weight standards	Weight Instruction	
14	Prepare PCS Departing Transactions (SPO)	Direct Access Online User Guide	
15	Complete SF-1038 for travel advances, if requested	CGS-JFTR 2300	
16	If requested, fax original order and SF-1038 to PSC (TVL) for travel advances	CGS-JFTR 2300	
17	Ensure member has an appointment scheduled with transportation office (TOPS site) to arrange shipment of HHG	None	
18	Transfer Government Travel Charge Card account to coordinator at the new PDS	Charge Card Instruction	
19	Return order to unit/member (SPO)	PPPM	
20	Ensure security debriefing is conducted	PERSEC	
21	Distribute order	PPPM	
22	Forward SPO PDR and Unit PDR to receiving SPO	PDR Manual	
23	Ensure medical record custodian forwards Medical PDR directly to the receiving medical facility via certified mail.	MEDMAN, Chapter 4	

PCS Reporting Checklist

Introduction

This checklist has been provided as a job aid to assist the unit and SPO in completing all necessary tasks for reporting in from PCS. This job aid is to be reproduced locally, and modified as necessary to unit unique departments.

Reporting checklist

Action upon member reporting.

Step	Action	Reference	Date
1	Endorse orders	PPPM, 2-A-2	
2	Verify member's entitlement to FSH and/or FSA-R, and BAH allowances	PAYMAN, 3-F	
3	Complete PCS Reporting and BAH/Housing Worksheets and forward to SPO with copy of endorsed order	CG PSC-2005 CG PSC-2025	
4	Update address in DEERS.	PPPM, 5-B-17	
5	Ensure member has a valid ID card	PPM, 5-D-6	
6	Update emergency contacts, e-mail and mailing addresses, allotment and bond addresses in Direct Access.	PPPM, 5-D-11	
7	If unable to complete address changes in Direct Access, ensure member completes PSC-2040, Allotment Worksheet and PSC-2060, Bond Worksheet	CG PSC-2040 CG PSC-2060	
8	If member is from one of the states that stop taxing when a member is no longer stationed in the state or starts taxing again when stationed back in the state, ensure member submits state tax withholding form.	PPPM, 8-B-3	
9	Ensure member completes travel claim for self and dependents, if applicable	PPPM, 2-B-4	
10	Ensure supervisor reviews travel claim and initials block 16 within 2 working days	PPPM, 2-B-4	
11	Ensure the travel claim and original order are forwarded to PSC (TVL) for processing	PPPM, 2-B-4	
12	Conduct security briefing	PERSEC	
13	If applicable, ensure Government Travel Charge Card account was transferred from old PDS	Charge Card Instruction	
14	Ensure an Enlisted Employee Review was completed by the previous unit within 92 days of detachment	PERSMAN, 10-B-5	
15	Update Family Member/Beneficiary/SGLI Information in Direct Access	PPPM, 5-A-2	
16	Review PDR	PDR INST	

Overseas Transfer Checklist

Introduction This checklist has been provided as a job aid to be used when a member receives an order for overseas. It is designed to be reproduced locally and should be used along with the PCS Departing Checklist.

Step	Action	Reference	Date
1	Ensure that message concerning overseas transfer with list of screening questions is received from the overseas command to which the member is ordered.	PERSMAN, 4-H-2	
2	Determine member and/or dependents for suitability within 10 days of receipt of transfer order. Use the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN and the list of screening questions sent by the overseas command to complete the interview.	PERSMAN, 4-H-2	
3	Ensure the servicing SPO supervisor has verified for completeness and signed the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN.	PERSMAN	
4	Ensure the member and dependents are medically qualified for overseas transfer. The member must have an approved overseas physical including immunizations and any essential dental treatment completed within the last 6 months.	PERSMAN, 4-H-3 MEDMAN, 3-A-7	
5	Ensure member and dependents • have valid ID cards • have International Certificates of Vaccination PHS-731 (if required) • are provided with detailed information concerning tour length and have elected an appropriate tour • are counseled regarding overseas station allowances when member is assigned to a restricted area and dependents reside in an area outside the U.S.	PERSMAN, 4-H-7	
6	Ensure that the member has made arrangements for PPassports if required.	Passport Instruction	
7	Ensure member, if in pay grade E-2 thru E-6, has a valid drivers license.	PERSMAN, 4-H-7.d	
8	Send entry approval request message to overseas command. **Note:** Ensure that the overseas command has received a copy of the Command Checklist for Overseas Screening prior to requesting approval.	PERSMAN, 4-H	

Automatic Stops of Pay and Allowances

Introduction

Certain pay entitlements are automatically stopped when the departing or reporting endorsement on orders transaction processes.

References

- PAYMAN
  Chapter 3, Allowances
  Chapter 4, Special Pay
  Chapter 5, Incentive Pay
- JFTR, para. U9100, Housing and Cost-of-Living Allowances

Auto Stops on PCS

This table shows pay entitlements, which will be automatically stopped when PCS transfer occurs.

Note: Automatic stops will not occur on interoffice transfers.

Entitlement Description	When the Entitlement Stops
Basic Allowance for Housing - Child (BAH Diff) (Codes P, Q, or R only)	On the day prior to reporting.
Basic Allowance for Housing (BAH)-Without Dependents	On the day prior to reporting.
Basic Allowance for Housing - Partial (BAH Partial)	On the day prior to the effective date of departure.
Enlisted Discount Meal Rate deduction	On the day prior to the effective date of departure.
Enlisted Basic Allowance for Subsistence (ENL BAS, REG BAS)	On the effective date of reporting PCS.
Career sea pay/time and premium	On the effective date of departure.
Combat Tax Exclusion	On the last day of the month of the effective date of departure.
CONUS Cost of Living Allowance (CCOLA)	On the day prior to the effective date of reporting.

Continued on next page

Automatic Stops of Pay and Allowances, Continued

Auto Stops on PCS (continued)

Entitlement Description	When the Entitlement Stops
OUTCONUS-Cost of Living Allowance (OCOLA), with or without dependents and partial If dependents are delayed	On the day prior to the effective date of departure. Date last dependents departs within 60 days.
Crew flight pay (enlisted only)	On the effective date of departure
Diving Pay	On the effective date of departure if no leave enroute. or The last day of leave enroute up to 30 days.
Family Separation - Housing (FSH) and Family Separation Allowance (FSA-S only)	On the effective date of PCS departure.
Family Separation Allowance (FSA-R and FSA-T only)	On the day prior to reporting, less any leave, proceed time or compensatory absence.
Hardship duty pay-location	On the effective date of departure.
Hostile Fire, Imminent Danger Pay	On the last day of the month of the effective date of departure.
Noncrew flight pay	On the effective date of departure.
Overseas Housing Allowance (OHA), with and without dependents If dependents are delayed	On the day prior to the effective date of departure. Date last dependents departs within 60 days.
Responsibility Pay	On day prior to departure.
Special Duty Assignment Pay (SDAP)	On the day prior to the effective date of departure.

How to Prepare NATO Supplemental Orders

Introduction

A NATO order, along with proper identification, allows an individual to pass without difficulty from one NATO nation to another. This order is only for the movement of military personnel, their personal baggage, individual weapons, and official documents.

References

CG Personnel Manual, Article 4-A-18, NATO Supplemental Order

Format for order

The below table describes how to complete a NATO order.

Step	Action
1	Top of letterhead type: Grading of Form: NATO UNCLASSIFIED
2	Include in the heading: country of origin, SSN, date order prepared.
3	In the first paragraph include: • Name, rank, grade and ID card number • Destination, within NATO country. • Date of departure from original country. • Number of days member will remain in NATO country, if PCS, so indicate.
4	In the second paragraph include: Authorization for member to possess and carry firearms.
5	In the third paragraph include: The number of official dispatches and that they are official documents.
6	In the fourth paragraph include: A certification that the travel is under the provisions of the NATO Status of Forces Agreement.

Note: Officer authorizing the NATO travel will sign the order.

Continued on next page

How to Prepare NATO Supplemental Orders, Continued

Recommended format

Here is the recommended format for NATO travel orders

Note: **NATO** travel orders will be prepared in English and French. Any instructions printed on the reverse of the orders will appear in English only.

Grading of form: **NATO UNCLASSIFIED**

NATO TRAVEL ORDER **ORDRE DE MISSION OTAN**

Country of Origin: Social Security Number
Pays de provenance: Date order issued

1. The bearer (and group as shown heron or on attached list)
Le porteur (et personnel porte ci-dessus ou sur la list jointe)

Personal/Identity Card No. (if any) Name: Rank/Grade
*No Mle/de la cazrte d'identite*_____*Nom:*_____
(s'il y a lieuy)

will travel to:
fera mouvement a: _____

Date of departure
*Date du depart, le (ou vers le):*_____

___For a period of approximately _____days _____For permanent change of station,
*Pour a peu pres*_____*jors*_____ *Pour changement permanent de garnison.*

2. Authority (is)(is not) granted to possess and carry arms.
Autorisation dep port d'armes (accordee) (non accordee).

3. The person named in paragraph 1 is authorized to carry _____ sealed dispatches.
La personne indequee au paragraphe 1 est authorisee a porter _____ plis scelles.

a. These dispatches contain only official documents.
Ces plis ne contiennent que des documents officiels.

4. I hereby certify that this individual/group is/are member(s) of a Force as defined in the NATO Status of Forces Agreement, and that this is an authorized mover under the terms of this agreement.

Je soussigne certifie que le personnel vise appartient a une armee telle definie dans I'Accord OTAN sur le statu des Forces Armees et que ce deplacement est officiel selon les termes de cet accord.

Signature of Officer
Authorizing Movement

Section Overview

Introduction

This section prescribes processes completed for the execution of Temporary Duty (TDY).

In this section

Topic	See Page
The Temporary Duty (TDY) Order	2-B-2
The Travel Claim Process and Responsibilities	2-B-4
Unit Travel System (UTS) Process	2-B-5
The Traveler	2-B-9
The Proxy	2-B-10
The Signature Proxy	2-B-11
The Approving Official (AO)	2-B-12
Personnel Service Center (PSC)	2-B-14
The CG Finance Center (FINCEN)	2-B-15
Records Maintenance	2-B-16
Audits (Reviews)	2-B-17
FAX of PCS Advance Requests	2-B-20
Amendments to TDY Orders	2-B-21
Blanket Travel Orders	2-B-22
Group Travel Orders	2-B-23
Leave and Liberty Combined With TDY Travel	2-B-24
Pay Entitlements Affected by TDY	2-B-26
Preparation of TDY Order (CG-4251) Blocks 1–11	2-B-27
Preparation of TDY Order (CG-4251) Block 12	2-B-29
Preparation of TDY Order (CG-4251) Blocks 13-19	2-B-30
Forms of Written Orders (Examples)	
• Letter Travel Order	2-B-31
• Authenticated Original Message / E-mail Order	2-B-32
Temporary Duty (TDY) Checklists	2-B-34
Reimbursement Methods	2-B-36
Submission of Manual Travel Claims	2-B-40
Rules for Claiming Official Phone Calls	2-B-43
Accounting Data	2-B-44

The Temporary Duty (TDY) Order

Introduction

It is critical for both Coast Guard travelers and their supervisors to understand the administrative responsibilities for completing and reviewing TDY Travel Orders and Travel Claims.

For the Traveler

The traveler is the single most important person involved in the travel claim liquidation process. Without a properly completed claim, full reimbursement will not be possible.

Purpose of a TDY Order

The Temporary Duty (or TDY) Order establishes the conditions for official travel and transportation and provides the basis for traveler entitlement and reimbursement. An effective TDY Order provides information that is clear and is complete.

Requirements for a TDY Order

The written TDY order is a document that meets several practical and mandated administrative requirements. The travel order expresses:

- Detailed information for personnel or agencies to provide support services to the traveler, (i.e., Travel Management Centers, Commercial Ticketing Offices (CTO), Transportation Officer, etc.) about the authorized traveler.
- Accounting information to enable correct funds accounting.

Continued on next page

The Temporary Duty (TDY) Order, Continued

Information elements

The TDY Order must answer several elemental questions. The questions are:

- **WHAT** mode of transportation is authorized and/or directed?
- **WHAT** type of quarters is authorized and/or directed?
- **WHAT** type of messing is authorized and/or directed?
- **IS** the traveler a government travel charge card holder?
- **WHAT** is maximum amount of travel funds authorized?
- **WHAT** is the accurate Travel Order Number (TONO) and Accounting line data?
- **WHAT** are the specific reimbursable expenses that must be pre-authorized on the Travel Order, (i.e., Conference costs, Registration fees, Rental vehicle and size authorization, Communication services, Excess baggage, etc.)

While You Are Traveling

Obtain receipts for **ALL** expenses while you are traveling. Although receipts are required only for lodging and individual expenditures of $75 or over, the receipts you collect during your trip will act as a record of expenses and be an invaluable tool when you complete your travel voucher.

The Travel Claim Process and Responsibilities

Introduction

This section outlines the travel claim process and shows the responsibilities associated with each stage of the travel claim process.

Integrated Automated Travel System (IATS)

The Coast Guard has an "on-line" system called Integrated Automated Travel System (IATS) for the liquidation of travel claims. With this system the Coast Guard can liquidate travel settlements in a matter of days.

Process

This table shows the manual travel claim process and responsibilities.

Stage	Who Does It	When	What Happens	
1	Traveler	Within 3 days of completion of TDY or PCS travel. (For PCS, submit after dependents travel, if dependents travel separately)	Submits travel voucher to Supervisor for administrative review. • Retains copy of travel voucher, orders, and receipts. Member must retain copies for 6 years, three months.	
2	Supervisor	Within 2 days of receipt from member.	Reviews claim for completeness. • Dates and signs claim indicating the traveler completed the ordered travel. • Forwards original claim to PSC.	
3	PSC (TVL) Examiner	Within 4 days after receipt, depending on workload. (e.g., For periods of heavy travel it may take longer.)	• Review travel voucher and enter into IATS.	
			If travel voucher is	**Then**
			Complete, correct, and accurate	Forward reviewed claim and voucher summary to PAO. (Go to Step 4)
			Incorrect or incomplete	Examiner returns claim to member.
4	PSC (TVL) PAO	Claim is received from examiner	Certifies travel voucher for payment and returns to examiner for filing and mailing. **Note**: A traveler whose entitlements are less than a Government travel advance will be sent a letter of overpayment at this point. See the section about advances for more information on the recoupment procedures.	
5	Coast Guard Finance Center	Upon receipt from PSC (TVL)	**If payment is**	**Then**
			Direct Deposit	Payment will be transferred to the traveler's account within 10 days.
			Check (For non-military traveler)	Check will be mailed to the address listed on the travel claim within 15 days.

NOTE: Travelers utilizing industrial site funding MUST contact their respective industrial site to ascertain if payment has been made.

Unit Travel System (UTS) Process

Introduction

UTS is a Windows-based application that provides standard drop-down menu boxes and a help wheel to complete and process TDY transactions.

Benefits

- Utilizing stored data from the UTS Travel Order to complete the UTS Request for Travel Settlement eliminates paperwork and improves data accuracy.
- Increased percentage of correct entitlements and payments for travelers.
- Per Diem rates are available to ALL system users on a “real-time” basis.
- Travelers can verify/inquire about the status of claim(s) on-site by accessing the UTS main menu.
- A single system that can create and produce ALL travel documents necessary to execute government travel.
- Eliminating manual processes decreases reimbursement cycle time.

Description

Unit Travel System (UTS) is a software application designed to run on Coast Guard Standard Workstation III (CGSWSIII). UTS provides an electronic link between the traveler, the Authorizing Official and the Integrated Automated Travel System (IATS). IATS is the software application used by PSC (TVL) to compute claim/voucher entitlements and transmit the information to FINCEN for payment. UTS deployment is a significant stride toward the travel claim process becoming a “paperless” system.

Purpose

UTS has been developed to be the primary TDY Travel Claim Settlement System for the U.S. Coast Guard.

Uses

UTS may be used to create a Temporary Duty (TDY) Travel Order, Request for Travel Advance and/or Request for TDY Settlement.

Unit Travel System (UTS) Process, Continued

Process This table shows the automated travel claim process and responsibilities.

Stage	Who	When	What Happens
1	Traveler	For TDY Order: Prior to departure on TDY. For TDY Settlement: Within 3 days of completion of TDY.	Complete Request For TDY Authorization and "Send to AO" for approval. Complete Request For TDY Settlement and "Send to AO" for approval. • Forward original travel order and receipts to AO.
2	AO	Within 2 days of receipt from member.	Reviews TDY Authorization and TDY Settlement in UTS for accuracy and completeness. • If error, return to Traveler w/remarks to correct. • If accurate and complete, release in UTS as approved to PSC.
3	PSC (TVL)	Daily.	• Conduct export routine to create batch of UTS transactions. • Conduct import routine to download UTS batch to IATS for computation and release to FINCEN.
		In IATS:	**If travel voucher is:** / **Then:** Complete and accurate: Release claim blocks to FINCEN for payment. Incorrect or incomplete: • Utilize workaround if one exists for the particular problem. • Delete claim for subsequent submission by traveler if workaround doesn't exist.
4	PSC (TVL) PAO	PAO requests original travel claim for member on a random basis	Conduct audit to verify as complete, accurate and in accordance with Federal Travel Rules and Regulations. • If underpayment due to traveler and/or AO oversight, the responsibility is on the traveler to submit a supplemental claim to receive entitlement. • If underpayment due to system error, supplemental will be processed by PSC (TVL). • If overpayment due to system error or due to traveler and/or AO oversight, PSC (TVL) will submit supplement to establish collection of debt. **Note:** A traveler whose total entitlement is less than an applicable government travel advance, a letter of indebtedness will be sent to traveler for collection.
5	Member	If audited, mails original orders, claim, and receipts within 2 days of notification. *See 2-B-48 for address and procedure for submission.*	

Unit Travel System (UTS) Process, Continued

Critical Elements

These "Critical Elements" should be addressed to successfully manage the UTS process at your unit:

Number of UTS Approving Officials. Designate enough UTS Approving Officials at your unit to approve UTS transactions and avoid backlogs or process delays. It is recommended that one UTS AO be designated in each section, or otherwise at a ratio of 1:12.

Obligating Travel Funds. UTS *will not* obligate travel funds. Normally, the obligating of funds is done prior to creating travel orders. Coordinate the flow & timing of this activity with Accounting or Admin offices. Develop internal procedures that streamline and coordinate this activity at your unit.

Empowering UTS Approving Officials. It is critical to empower UTS AO's by granting them the authority to request, retrieve, and input Travel Order Numbers (TONO's/Document ID numbers) in UTS. The UTS AO cannot approve a UTS transaction without first having a valid TONO and fund accounting string. Develop internal procedures that streamline and coordinate this activity at your unit.

Record-keeping. The traveler shall maintain complete and accurate records of all travel claims for 6 years and 3 months.

Airline or Hotel Reservations. Use your designated Travel Management Center and coordinate this activity at your unit.

User Identification and Passwords. User identification and passwords are the most common method of controlling access to the system. Identification involves the identifier or name by which the user is known to the system (e.g., user). Each user should have a unique user identification and password. Passwords will be eight or more characters long and should be alphanumeric. The traveler is required to change their password and confirmation codes every six months.

User Categories

There are four categories of UTS users, each with a different role and responsibility. These UTS user categories are:

1. Traveler
2. Proxy
3. Signature Proxy
4. Approving Official

Continued on next page

Unit Travel System (UTS) Process, Continued

User Categories/ Privileges

UTS allows users more than one access capacity, if authorized. In UTS, the term "VIEW" is used to identify a particular user category. Each user category comes with certain access privileges. To change your "VIEW", use the SET VIEW command to utilize one of the following User Categories:

USER CATEGORY	UTS SET VIEW STATUS	THIS PRIVILEGE CAN…	HOW TO SET PRIVILEGE
TRAVELER	Set View: Traveler	Create your own travel documents and forward to a Unit AO for approval.	Set automatically, this is a basic, universal user setting.
PROXY	Set View: Proxy This privilege supports all travelers of the same business unit.	Create all travel documents on behalf of another traveler, BUT such documents can only be forwarded to the traveler.	Set automatically by unit OPFAC number. Any traveler can act as a proxy for another member of the same unit.
SIGNATURE PROXY	Set View: Proxy This privilege only supports one specific traveler.	A traveler can designate another user (Proxy) to create, sign for, and forward travel documents to a Unit AO.	The traveler would designate a signature proxy, someone of the same unit, in the Personal Profile, Security & Access Information.
APPROVING OFFICIAL **Administrative Reviewer**	Set View: Authorizing This privilege supports all travelers of the same unit or as designated.	Approves travel documents. Ensures that mission was completed and that travel expenses were reasonable, justified, and consistent with the mission.	Each business unit designates enough AO's to keep UTS work flowing. ONLY PSC Travel can turn on and off AO privileges

The Traveler

Introduction

The lowest user access level in UTS is called “TRAVELER”.

Authorized UTS Travelers

Any Coast Guard active duty, reserve, and civilian employees having access to CGSWSIII can use UTS as a “TRAVELER”.

Non-UTS Travelers

Other travel customers/claimants must continue to submit paper-based travel claims, using form DD-1351-2 (Aug 1997 edition). These customers must mail their travel claims to PSC for processing.

Non-UTS Travelers are:

- Anyone who does NOT have access to CGSWSIII
- Other service members or civilians traveling on behalf of the USCG
- Dependents
- Non-appropriated fund activity employees
- Members who separate or retire from the service (who depart their unit)
- Coast Guard Auxiliarists

Traveler Database

PSC (TVL) downloads, maintains and updates the customer database once every two weeks, coinciding with the PMIS/JUMPS update cycle. Each UTS customer is provided their own traveler profile which holds personal data, regular mail and e-mail addresses, and other relevant information -- all of which must be kept up to date by the TRAVELER.

Problems with Traveler Database

Each TRAVELER profile is linked to a Unit OPFAC number. If you have an employee assigned to your unit who is unable to access UTS, contact PSC Customer Care for assistance:

Phone: 1-866-772-8724 or 1-785-339-2200.

Online Trouble Ticket – http://www.uscg.mil/hq/psc/customerservice.htm

The Proxy

Definition	A Proxy is a person designated to create (but not sign for or deliver) travel documents (travel orders and claims) for another individual.
Who Can Be a Proxy	Any traveler can act as a Proxy for another member of the same unit.
Limits	Travel documents prepared by a Proxy can only be forwarded to the traveler.

The Signature Proxy

Definition	A Signature Proxy is a person designated by a traveler to create, sign for, and forward travel documents.
Who Can Be a Signature Proxy	Any person in the same unit can be designated a Signature Proxy by a traveler.
Designation Procedure	The traveler designates the Signature Proxy in their personal profile.

Note: A member shall not serve as both the signature proxy and Approving Official.

The Approving Official (AO)

Introduction

The Approving Official (AO) authorizes travel, approves expenses and forwards e-claims to PSC. Each unit must designate AO's to approve their UTS transactions. PSC (TVL) controls the maintenance of AO privileges in UTS for all units. AO's are required to physically possess the hardcopy order, advance or settlement request prior to electronic approval in UTS.

Who Can Be an AO

Any E-5 or GS-6 and above, operating in the capacity of supervisor or manager, can be designated.

AO Duties

AO's must:

- Confirm individual travelers possess a Government-sponsored Travel Charge Card (GTCC) when commencing official travel.
- Authorize and approve travel in support of the required mission(s).
- Make certain that directed travel is performed in the most efficient manner.
- Determine that travel expenses were necessary, reasonable, justified, and consistent with completing the assigned objective or mission.
- Deny/disapprove travel and travel expenses that DO NOT adhere to Federal Travel Rules and Regulations.
- Review and approve travel documents within 2 days or receipt.

Continued on next page

Approving Official (AO), Continued

Designation

UTS profiles must be set up with user's password and general information required prior to faxing a request for UTS AO designation. UTS AO designation requests without a member's basic profile will not be updated in UTS by PSC.

Procedure

To designate a UTS AO, complete UTS Approving Official (AO) Designation**,** CG PSC-7421 (http://www.uscg.mil/hq/psc/forms/).

1. Complete the first three sections of the form at the unit level.
2. Fax the form to PSC Travel at (785)-339-3774.
3. Upon receipt, PSC Travel will enable AO privileges in UTS.

Six helpful links can be found on http://cgweb.fincen.uscg.mil/metaframe.htm to aid members accessing UTS. The unit shall retain the original CG PSC-7421 until the member/employee departs the unit (transfer, discharge, etc.), or the UTS AO designation is otherwise terminated or revoked.

Terminating Privileges

To terminate UTS AO designation and privileges, complete the final section of CG PSC Form 7421 and fax to PSC Travel at (785) 339-3774.

PSC

Introduction As the Process Owner of UTS, PSC (TVL) conducts system management, maintenance, and development.

Support Services This list identifies UTS support services provided by PSC (TVL).

Service	Description
Technical Support	Assistance troubleshooting UTS software errors, providing feedback to the field, and reporting corrections and enhancements to programmers.
Maintenance	Download/update UTS database(s) of AO's, user profiles, CG standard accounting lines, city per diem rates, and Reimbursable Agreement Numbers (RAN).
Travel Entitlement Computation	Process UTS transactions through IATS to calculate entitlements.
FINCEN Liaison	Act as liaison by releasing IATS data electronically to FINCEN for payment processing and resolving reported errors.
Reports	Provide query reports of value to units.
Resources	Travel Branch maintains several valuable links on travel entitlements at: http://www.uscg.mil/hq/psc/tvl.htm

The CG Finance Center (FINCEN)

Introduction

The CG Finance Center (FINCEN) is responsible to verify IATS downloads from PSC and processing travel claim data for payment.

Support Services

This list identifies UTS support services provided by CG FINCEN.

Service	Description
Customer Service	Travelers can call 1-800-564-5504 (or 757 523-6940 for OCONUS travelers) to use FINCEN's auto-attendant that reports the status of a travel payment.
Debt Collection	Collection of debts resulting from travel claim liquidation is established by FINCEN.
FINCEN Website	To electronically view payment status of claims go to: http://cgweb.fincen.uscg.mil/

Records Maintenance

Traveler	It is the traveler's responsibility to verify **by means of current regulations**, maintain, and manage records for all travel transactions related to UTS.
Travel Document Verification	Prior to approving transactions for claim settlement in UTS, the AO must have all supporting documentation and verify the data entered in UTS is accurate. Without the original travel order, amendments, receipts, and advance requests, the AO *should not* approve the transaction for payment.
Records Retention	The member should retain travel claim records for six years and three months.

Audits (Reviews)

Auditing

Due to requirements of the Joint Federal Travel Regulations (JFTR) ALL Travel Claims submitted are subject to the audit review process to ensure funds accountability, unit controls, and process integrity.

PSC (TVL) will notify a unit by email of Travel Claims selected for audit. **Members are not to submit an audit package prior to receiving a request.**

Travel Claim Package

The original Travel Claims package will consist of:

- Copy of signed original orders (all original travel orders MUST be signed by an approving official including those generated by direct access).
- Copy of all signed amendments .
- Copy of travel claim (1351-2 electronically signed by traveler and UAO).
- Copy of itemized receipt(s) for all lodging .
- Copy of airfare itinerary(s) (must reflect cost of airfare).
- Copy of rental vehicle contract(s) (estimate receipts are not acceptable).
- Copy of receipts for all reimbursable expenses of $75 or more.
- Credit card statements are not authorized to be used as a receipt.

Tasks

All Travel Claims submitted are subject to the audit review process to ensure funds accountability, unit controls, and process integrity.

Who	Responsibility
PSC (TVL)	• Initiate audit requests for specific claims by email to the traveler. Further instructions will be provided at the time of the audit request. • Audit claims by comparing UTS travel claim information with submitted audit package. • If an incorrect payment is found during the audit, a credit or pay adjustment authorization (PAA) will be issued to resolve the travel discrepancy.

Continued on next page

Tasks (cont)

Who	• Responsibility
PSC (TVL)	• Notify first audit request via e-mail. If a requested audit is not received within one month, a second request is sent. If a requested audit is not received within two months, a third and final request is sent via email to the traveler and traveler's command. If a requested audit is not received within three months after the initial audit request the traveler will be placed in an overpayment status and collection action will be taken. All of these email notifications are sent first using the travelers UTS email address and secondly using their direct access email address. It is imperative that members ensure their email address in both UTS and Direct-Access are current. • Claims received from units will NOT be returned. • Claims that do not result in an overpayment of travel entitlements and have original orders and/or receipts will be returned to traveler using their most current address in direct access. • Notifies traveler via email that audit package has been received at PSC. • Initiate and mail Pending Audit Reports to units providing notification of audit requests. • Return incomplete audit packages to travelers for corrective actions.
Traveler	• Mail travel claims package for UTS audits to: Commanding Officer (TVL- UTS Audits) U. S. Coast Guard Personnel Service Center PO Box 3551 Topeka, KS 66601-3551 For travel claim packages being sent via Federal Express or United Parcel Service mail to the following address as these companies do NOT deliver to a PO Box: • Commanding Officer (TVL- UTS Audits) U. S. Coast Guard Personnel Service Center 444 SE Quincy Street Topeka, KS 66683-3591

Continued on next page

Tasks (cont)

Who	Responsibility
TRAVELER	• Do NOT mail original orders, amendments, and receipts with your travel claims package. • Notify UTS AO immediately of any known discrepancies or changes to audited original travel claims. • Travelers can request a suspension of an audit due to operational commitments. Requests need to be submitted via email to PSC Customer Care. Requests must include the claim number and the estimated ending date of suspension. • Responsible for repayment of monies received due to erroneous information provided on original claim submission. Do NOT send any cash, checks, or money orders to PSC (TVL). Please make your check or money order payable to "U.S. Coast Guard", and write your SSN and TONO on your payment. Include a copy of your official notice of travel overpayment letter and send your payment to: ART/OTHERS U. S. Coast Guard ART/OTHERS PO Box 403391 Atlanta, GA 30384-3391 • If an audit results in an overpayment, travelers are not authorized to submit subsequent claims in UTS to cancel the debt. If a supplemental travel claim is necessary to offset the debt the supplemental claim package must be mailed to PSC (TVL-UTS Audits). • Take corrective action on returned claims and resubmit for audit within 10 days. • Maintain original orders, amendments, travel claim, and receipts for a period of 6 years and 3 months.

FAX of PCS Advance Requests

PCS Advance Requests: Fax the following documents for PCS Advance:

- A fax cover sheet that identifies the originator, the member's full name and SSN, authorizing official's name, and unit name with phone number.
- A completed original PCS Travel Order signed by the authorizing official. Ensure PCS travel advance entitlements are authorized on orders.
- A completed original SF-1038 "Advance of Funds Application and Account" with the authorizing official's signature (Original signature in ink, not stamped). Blocks 1 through 10 on the SF-1038 must be completed. PSC (TVL) will mail the completed travel voucher summary to the traveler's address in block 9d of SF-1038. A traveler who submits a command approved PCS Departing Worksheet requesting an advance does not need to sign the SF-1038. Their signature is on the PCS Departing Worksheet; type "Signature on File" in the signature block of the SF-1038.

Where to Fax: **Fax #**: (785) 339-3775

Amendments to TDY Orders

Amendment to Orders

Orders can be amended after-the-fact to document verbal authority given during the TDY travel period when unforeseen circumstances emerge that require the traveler to incur costs not originally anticipated.

The Order Issuing Official who directed and funded the travel makes amendments to TDY Orders. The amendment should identify:

- Traveler
- TONO/ACCTNG Data
- Entitlement specified
- Reason for change
- Authorized Official Signature (Original signature in ink, not stamped)

Amendments are done on memo, letterhead, or handwritten note and attached to the original TDY order. **Amendments require the AO's original signature.**

When Amendments Are NOT Authorized

There are some provisions that, if not authorized in the TDY order BEFORE travel starts, CANNOT be approved for payment after travel is completed.

Example: An order DIRECTING use of common carrier cannot be amended after the fact to permit some other form of transportation when common carrier was the order issuer's intended form of transportation for the member.

Amendments Cannot Be Used to Deny an Entitlement

Under NO CIRCUMSTANCES can a TDY order be amended after the fact to deny a travel entitlement originally contained in the travel order

Example: Orders may not be revoked or modified retroactively so as to increase or decrease the rights that have accrued or becomes fixed, after the travel has been performed.

After travel is completed, an authority cannot retroactively modify travel orders to direct a reduced per diem rate when a commercial meal rate was initially authorized.

Blanket Travel Orders

Definition	A Blanket Travel Order is a TDY Order that covers repeated travel over an extended period of time.
Reference	JFTR, U2140-B, Blanket or Repeated Travel Orders
Requirements	Blanket Travel Orders must meet the following requirements. • Be an order for an individual. • Define the time period covered by inclusive dates, **cannot cross FY**. • Define the geographic area in which travel can be performed.
Monthly Order	The period covered by a Blanket Travel Order that is one month in duration.
Quarterly Order	In a situation of almost constant travel (e.g., the sum of the TDY travel is expected to be 1 out of 3 months), a quarterly travel order may be appropriate.
Order For a Period in Excess of a Quarter	Only under the most continuous travel circumstances (e.g., the sum of the traveler's TDY period is expected to equal or exceed 6 months) should a Blanket Travel order for a period in excess of a quarter be issued.

Note: Generic actual expenses, i.e. Actual Expense or Super Actual Expense, are not authorized. Authority must list specific dates and locations for each trip.

Group Travel Orders

Definition

A group Travel Order is a no cost order that covers a group while traveling between the permanent duty station and a TDY location or between TDY locations. Travel claims are not required to be submitted.

Reference

- JFTR, U4000, Guidelines in Prescribing Members Traveling Together
- PERSMAN, Exhibit 4-G-1, Page 4, Guidelines in Prescribing Group Travel

Travel Entitlements

- Group travel affects travel entitlements for travelers of the group ONLY while traveling between locations. Group travel has no impact on travel entitlements for travelers of the group while at TDY location(s).
- For unexpected expenses, attach form SF-1164 to orders.

Identifying the Travelers

The name of the senior traveler of the group will appear on the order with other travelers listed on an attachment that is a part of the order.

Example: TO: LTJG/O2 SAFE T. HATCH 000-00-0000, USCGR and group (see attached)

- This procedure generally enables changing only the attached list when the membership of the group changes <u>before</u> travel begins.
- If the senior member changes, the basic order <u>must</u> be redone.

Preparing the Attachment

The attachment will list and fully identify each traveler of the group by the following information:

- rate/rank/grade
- name
- SSN
- document identification number suffix

Note: The document identification # for each member will be the same EXCEPT each traveler will have a unique suffix specifically identifying that member.
The command and staff symbol and duty phone need only be shown if the travelers are from different commands than that of the senior member.

The last entry must be “AND NO OTHERS”.

Leave and Liberty Combined With TDY Travel

Introduction

A traveler will sometimes combine **leave and/or liberty** (LV/LIB) with TDY travel.

- The member may be…
  - Taking LV/LIB time to depart on TDY early or
  - Taking LV/LIB time and returning from TDY late

An entry in the "remarks block" of the travel order specifying the traveler's LV/LIB status in connection with TDY travel is required. The entry needs to denote the travel status will "constructively" begin on the necessary departure date and/or end on the necessary return date, exclusive of LV/LIV time.

The traveler will note LV/LIB in the itinerary section 15 of DD-1351-2.

Rationale

TDY Orders where LV/LIB liberty is combined with travel MUST be annotated to prevent per diem from being erroneously paid for liberty days. THERE ARE NO TRAVEL ENTITLEMENTS EARNED DURING LEAVE OR LIBERTY.

Example 1: Member Departs Early

Situation: Travel that should commence on January 8 but actually commences on January 6.

Entry: "You are to depart for TDY on 08JAN(YR) for about 6 days. You are authorized to depart on 06JAN(YR) in a liberty status. Travel status for per diem will begin constructively on 08JAN(YR). Note on your travel claim in block 16 the time and date your official duties at the TDY site began."

Example 2: Member to Return Late

Situation: Travel that should commence on January 8, and should end back at the permanent duty station on January 13 but will actually end on January 15.

Entry: "You are to depart for TDY on 08JAN(YR) for about 6 days. You are authorized to remain at (TDY location) in a liberty status until 15JAN(YR). Travel status for per diem will end constructively on 13JAN(YR). Note on your travel claim in block 16 the time and date when your official duties at the TDY site ended."

Continued on next page

Leave and Liberty Combined with TDY Travel, Continued

Example 3: Member to Depart Early and Return Late

Situation: Travel, which should commence on January 8 but actually will commence on January 6 and should end back at the permanent duty station on January 13 but actually will end on January 15.

Entry: "You are to depart for TDY on 08JAN(YR) for about 6 days. You are authorized to depart on 06JAN(YR) in a liberty status. You are authorized to remain at (TDY location) in a liberty status until 15JAN(YR). Travel status for per diem will begin constructively on 08JAN(YR) and end constructively on 13JAN(YR). Note on your travel claim in block 16 the time and date when your official duties at the TDY site began and ended."

Pay Entitlements Affected by TDY

Introduction

Some pay entitlements may be affected by TDY assignment. The SPO/Unit must ensure the traveler is aware of all entitlements affected by TDY orders.

Reference

PAYMAN

- Section 3-B, Basic Allowance for Subsistence - Enlisted Members
- Section 3-G, Family Separation Allowance (FSA)
- Section 4-A, Hardship Duty Pay - Location
- Section 4-B, Career Sea Pay

Affected pay entitlements

Use this table when counseling a member on which pay entitlements may be affected by a TDY order.

WHEN member goes TDY	THEN member
to a career sea pay eligible vessel/mobile unit,	is entitled to sea pay/time at the Level One rate (unless the member is permanently assigned to a CSP-eligible unit with a higher level of sea pay).
to a unit without a government dining facility	is entitled to ENL BAS (or grandfathered REG BAS) while TDY (both during travel and while at the TDY site).
to a unit with a government dining facility,	is entitled to ENL BAS (or grandfathered REG BAS) during travel days, and ENL BAS minus DISCOUNT MEAL RATE while at the TDY site.
to a shore unit from a career sea pay eligible vessel/mobile unit over 30 days,	is not entitled to sea pay after 2400 on the 30th day.
over 30 days and has dependents	may be entitled to Family Separation Allowance (FSA-T).
from a career sea pay eligible vessel,	may not combine ship underway time with TDY time to qualify for FSA-T.
over 30 days	MAY lose entitlement to hardship duty pay-location and/or diving pay.
away from overseas permanent station	entitlement to Family Separation Allowance - Housing (FSH) will terminate on the 59th consecutive day of TDY.

Preparation of TDY Order (CG-4251) Blocks 1-11

Introduction

The CG-4251 is a form for issuance of civilian and military Temporary Duty (TDY) orders. The CG-4251 can be prepared using **Adobe forms application software** or a typewriter.

Procedure

Here are specific directions to complete blocks 1 through 11 of the CG-4251.

Block	Entry	Ref.
1. Name	For individual travel enter the traveler's name in the following format: LAST, FIRST, MI, SUFFIX	
	For group travel enter the senior traveler's name in the following format: LAST, FIRST, MI, SUFFIX, AND GROUP (SEE ATTACHED)	
2. Grade/Rate	The traveler's rate/rank and pay grade Example 1: MK2/E5 Example 2: LTJG/O2	
3. DIV/Branch	The traveler's command (and staff symbol) if any. Example 1: ISC ALAMEDA (pru) Example 2: COMDT (G-WPM-2)	
4. Ext	The traveler's duty phone number, including area code, and extension. Example: 7853573691X35	
5. Depart Date	The date that the traveler is to depart the PDS and begin TDY travel, in the following format: DDMMMYYYY Example: 08DEC1996 ♦ Note: If the traveler is taking leave or liberty and departing early enter the "constructive" date that the traveler would have departed to report on time had there been no leave or liberty authorized.	
6. Est. Days Absent	The number of days the traveler is expected to remain away from the PDS in a TDY status (do not include leave and liberty days) ♦ Note: This is the maximum number of days for which travel allowances can be paid. If the traveler is authorized to depart early and/or return late, an endorsement to the order authorizing the additional travel day(s) is required for additional travel allowances to be paid.	
7. Est. Cost	An estimate of the costs anticipated to be incurred to complete the ordered travel. Comment: The estimate is used to reserve (or obligate) funds for the travel, so accuracy is important. Costs that are more or less than the estimate will cause financial adjustments when the travel is completed and the actual costs are posted to the accounting system.	
8. Repeat Travel Orders	For a Blanket Travel Order enter the beginning and ending dates for the period the order covers, use the DDMMMYYYY format Example: FROM 01OCT1998 TO 31OCT1998 ♦ If this is NOT a Blanket Travel Order enter "N/A"	PPPM 2-B-20

Continued on next page

Preparation of TDY Order (CG-4251) Blocks 1-11, Continued

Procedure,
continued

Block	Entry	Ref.
9.a Cmd, Dist., Firm or Org.	The name(s) of the TDY activity(ies) Example: TRACEN PETALUMA CGDSEVEN	
9.b Location	The geographic location(s) including county(ies) if in CONUS Example: Sonoma County, CA Miami (Dade County) FL	
9.c Date/ Time	Used if desired by the order issuing command to specify the reporting date and time. Time is expressed using the 24-hour clock and the date is expressed in the DDMMMYYYY format. Example: 2400 22OCT1998	
9.d Revisit	• YES if traveler is authorized to revisit the TDY location(s) • NO if traveler is not authorized to revisit the TDY location(s)	
10.a Regis. Fee	• Registration fees reimbursement is authorized/approved when such fees are a condition for attendance. • Indicate in remarks (block 12) if the registration fee includes the cost of any meals and/or lodging.	JFTR U4535
10.b Excess Baggage	• Any accompanied / excess baggage to be carried at government expense in connection with the TDY travel.	JFTR U3015
10.c Local Travel	• Check the box if reimbursement for travel in the area of the temporary duty station is authorized.	JFTR U3300 JFTR U3510
10.d 1st class jet	• Leave blank, unless approval for use of first-class air accommodations has been received from the Commandant or Vice Commandant. • See DOT Travel Guiding Principles and submit Exhibit B – Request for Approval of Premium – Class Accommodations to COMDT (G-WPM-2)	JFTR U3125, DOT Travel
10.e U-Drive GSA Veh.	• Leave blank, rental car authorization (if any) will be entered in block 12 (remarks)	
10.f Days Leave	• The number of days leave authorized (if any). The leave must also be authorized on a CG-2519 (Leave Authorization)	PPPM 5-D-2
11 Mode of Travel	• Leave blank, use block 12 (remarks) to authorize or direct the mode of travel.	PPPM Enclosure (3)

Preparation of TDY Order (CG-4251) Block 12

Introduction Block 12 of the CG-4251 is used to

- document WHY the travel is being performed
- document WHAT is intended to be accomplished
- show HOW the travel is to be performed
- indicate expenses authorized
- indicate travel advances authorized
- enter any special provisions for the travel
- document the availability/non-availability of government quarters
- indicate TYPE of messing available

Instruction Follow these instructions to complete block 12 of the CG-4251.

- Example entries can be found in enclosure (3) to this manual.

Entry	Travel Data
A	TDY Quarters availability (Select only one per TDY site): (1) Government Quarters (Includes Contract) directed by TDY site. (2) Commercial Facilities. *****NOTE:** Per JFTR U4400, for CG Personnel only: Govt Qtrs are available only if use is directed in the order.*
B	Type of Messing directed at TDY location (Select only one): (1) Government Mess for all 3 meals. (2) Government Mess at the proportional Meal Rate. (3) Commercial Rate. (4) Reduced Per Diem in the amount of ($) per day IAW COMDT (G-WPM-2) letter 4600 of (Date) NOTE: When travel orders do not direct the Government Meal Rate, or Proportional Meal Rate, or a Reduced Per Diem Rate, the settlement will result in the locality M&IE rate being paid. (See JFTR U4125-A3g for "deductible meals")
C	State the mode of transportation directed to, from, and around TDY locality. One or more of these example attachments may apply. (1) AUTH (compact, mid, full-size) rental car at TDY location. (2) AUTH Commercial Air Trans between PDS/TDY location. (3) AUTH local travel/public transportation or taxi at TDY site. (4) AUTH local travel in vicinity of PDS incident to TDY. *****NOTE**: Always arrange Official travel from either a CTO, in-house travel office or TMC, JFTR U3120*
D	Government Travel Charge Card availability (Select only one): (1) Member possesses a Govt Travel Charge Card. (2) Member does not possess a Govt Travel Charge Card. (3) When either a Govt or Personal ATM Travel Advance is requested and authorized, the orders will state the following: (4) Travel Advance is authorized in the amount of ($).
E	Travel Expense reimbursable items that require pre-authorization on the travel order are: (1) AUTH Registration or Seminar fee, JFTR U4535. (2) AUTH Reimbursement for Conference Costs, JFTR U2550. (3) AUTH Actual Expense Allowance in the amount of ($) at (City, ST) for TDY period (Dates of TDY), JFTR U4200.

Preparation of TDY Order (CG-4251) Blocks 13-19

Introduction This will assist you in completing the remainder of the CG-4251.

Procedure Use these instructions to complete blocks 13-19.

Block	Description
13	Enter the date the individual requesting the travel signs the order, and the individual's signature. (OPTIONAL)
14	Enter the accounting data from the message (or other document) ordering the member's TDY. Object codes can be found in the Finance Center SOP, Appendix F.
14a	Approving official signs and dates.
15	Accounting division will complete.
15a	Accounting division official signs and dates.
16	Enter appropriate information as required.
17	Enter appropriate information as required.
18	From: Enter the approving official's command. To: Enter the name of the traveler.
Dist.	Original and 4 copies to the member. Copy for unit files. Copy for accounting/finance office Copy for each command to which the member is to report Copy for SPO
19	Authorizing Official signs and dates. Include the AO's phone number.

Letter Travel Orders

U.S. Department of Homeland Security
United States Coast Guard

COMMANDING OFFICER
USCG PERSONNEL
SUPPORT CENTER

444 SE QUINCY St.
Topeka, KS 66683-3591
Staff Symbol: (xxx)
Phone: (xxx) xxx-xxxx
Fax: (xxx) xxx-xxxx
Email:

MEMORANDUM

XXXX
3 Jan 2004

From: JOE BOSN, CGC NEVERSAIL

Reply to Attn of: TONO XX/XX/XXXXXXXXX000

To: BM1 C. Sick XXX XX XXXX, USCG

Subj: ORDERS; TEMPORARY DUTY; TRAVEL ORDERS

1. You are authorized to proceed from time to time during Fiscal Year _____ to such places within and beyond the continental limits of the United States as may be necessary on official business of the Coast Guard. Upon completion thereof, you will return to your permanent duty station for resumption of regular duty.

2. **Your TONO is XX/XX/XXXXXXXXX000**. Travel necessary to the execution hereof is required by the public interests and is authorized chargeable against Coast Guard Accounting Data X/X/XXX/XXX/XX/X/XX, cost center XXXXX. Travel within CONUS is chargeable against object code XXXX.

3. Travel via government transportation is directed beyond the continental limits of the United States wherever available. Travel via commercial carrier is authorized when government contract carrier is authorized in order to satisfy travel schedule requirements. For MAC, Class Two priority is certified.

4. Travel via privately owned conveyance is authorized providing it has been administratively determined, for each travel segment, that this mode of travel is clearly more advantageous to the government. Local travel via streetcar, bus, subway, street railway, train, etc., is authorized. The use of taxicabs at your temporary duty station is authorized subject to the restrictions outlined in paragraph JFTR U3510. Hire of special conveyance (GSA vehicle or rental vehicle) is authorized as set forth in paragraph JFTR U3415. Excess baggage is authorized.

5. Registration fees for conferences, seminars, etc., are authorized.

6. The provisions of chapter 4 of the Joint Federal Travel Regulation, governing per diem rate and reimbursable expenses shall apply under these orders. Authorizations for Actual Expenses Allowance must be authorized on a trip by trip basis made by a separate endorsement. The endorsement must indicate the location and of Actual Expense.

7. Possession of valid TOP SECRET clearance is certified. Prior to departure, you will, as required, avail yourself of Defensive Security Briefing procedures as set forth in Coast Guard Security Manual, M5500.11A.

8. No proceed time is allowed under these orders.

The authority contained herein will expire 30 September 20 2004, or upon relief of your duties as Director of Resources.

#

Authenticated Original Message Order

Introduction

In our effort to improve and simplify the travel process. There are three very acceptable methods of travel order production. When the use of a Coast Guard travel order form is not necessary, these methods can be used.

Types

Message Traffic

- That official telecommunication message traffic may be used as a travel order. Messages that fund and direct official travel can be modified in a travel order authenticating process and used instead of TDY travel order forms CG-4251 or CG-5131. The message would contain the same travel data as the form. Simple – Print it, Endorse it, Sign it, and mark as "Original".

E-mail

- Like message traffic, electronic mail (e-mail) can also be used as a travel order. Such e-mail must comply with COMDTINST 5270.1d; SUBJ: Management Of Electronic Mail. Namely: (a) a signed paper copy of electronically delivered correspondence must be retained on file at the point of origin; (b) e-mail should be sent RRR (Return Receipt Requested); and (c) the traveler receives an authenticated (signed) e-mail travel order prior to travel and for claim settlement.

TQC

- TDY training orders issued by Training Quota Management Center (TQC) via the Direct-Access Airport Terminal are on form CG5131. Simple – Print it, Endorse it, Sign it, and mark as "Original".

Message Authentication

The message travel order authentication process has the potential to reduce travel order preparation time and eliminate duplicative effort**.**

To qualify and use as a travel order form, the message/E-mail travel order, should possess this type of travel date (just like that of form CG-4251):

A. Travel order number (TONO) and accounting line data;
B. Traveler name, SSN, rank and unit;
C. Traveler PDS subsistence allowance (as shown in example below);
D. The Temporary Duty destination, Purpose and Location (City/County/St);
E. Reporting Time/Date;
F. Duration of TDY;
G. Mode of transportation authorized or directed;
H. Type of Quarters authorized or directed;
I. Type of Messing authorized or directed;
J. Whether traveler is (is not) a Gov't travel charge card holder;
K. Maximum amount of TDY travel advance funds authorized; and
L. Specifically name reimbursable expenses that must be pre-authorized on the travel order, i.e., Conference costs, Registration fees, Rental vehicle & size authorization, Communication fees, Excess baggage, or Actual expense allowance in the amount of ($) for (Locality name)(TDY period), etc.

Continued on next page

Authenticated Original Message Order, Continued

Message Endorsement

Make the following authentication endorsement on the top of the first (front) page of the E-mail or if using a message, immediately above the date time group (DTG) number:

QUOTE
(Type in the current date)
FROM: CO (OINC), LONG TITLE NAME OF UNIT
TO: RANK/RATE TRAVELER'S FULL NAME, SSN
1. YOU ARE DIRECTED TO TRAVEL TDY AS DESCRIBED HEREIN AND RETURN AND RESUME REGULAR DUTIES THEREAFTER. FOLLOW GUIDELINES ESTABLISHED IAW THIS MESSAGE TRAVEL ORDER CONSISTING OF (#) PAGES. UNLESS OTHERWISE DIRECTED, THE ACCEPTED MODE OF TRANSPORTATION IS: (AS APPROPRIATE).
2. YOU ARE (ARE NOT) A GOVERNMENT TRAVEL CHARGE CARD HOLDER. A TRAVEL ADVANCE IN THE AMOUNT OF ($OOO.00) IS AUTHORIZED AND SHOULD BE OBTAINED VIA (ATM OR TRAVELERS CHECKS). IF TRAVEL ADVANCE IS CHARGED TO THE USCG, ATTACH SF-1038 ADVANCE APPROVAL.
3. YOUR PERMANENT DUTY SUBSISTENCE ALLOWANCE IS:
(INDICATE EITHER: PARTIAL BAS, SEPRATS, OR ENL REG BAS OR OFF BAS)
4. (PLACE ADMIN MATTERS HERE, IE, AUTH LEAVE, MAW COMPLIANCE, ETC)
SUBMIT YOUR TRAVEL CLAIM WITHIN 3 DAYS AFTER RETURNING FROM TDY FOR REVIEW AND APPROVAL BY YOUR SUPERVISOR.
//S//
AUTHORIZING OFFICIAL SIGNS MSG/E-MAIL
INSERT AO PHONE NUMBER AND DATE.
UNQUOTE

- AFTER AO SIGNATURE (Original signature, in ink, not stamped) (AUTHENTICATION) HAVE MSG STAMPED: ORIGINAL.

Continued on next page

Temporary Duty (TDY) Checklists

Introduction

These checklists have been provided to assist the unit/SPO in completing all necessary tasks required for departing and reporting members who are performing TDY. These job aids are designed to be reproduced locally.

TDY Departing checklist

Use this checklist when a member requires a TDY order.

Step	Action	Reference	Date
1	Counsel member on travel and pay entitlements	JFTR, Chap. 4 PPPM, 2-B-29	
2	Set up travel arrangements. If member is going TDY to "A" School, and an airline ticket is issued, ensure it is a round trip ticket.	Local policy	
3	Get Commandant (G-WPM) approval if TDY will be over 180 days	CGS-JFTR, 2145	
4	Complete travel order	**PPPM, 2-B-25**	
5	Ensure member has sufficient funds; arrange for advances if needed	CGS-JFTR, 2300	
6	Ensure member has sufficient obligated service	PERSMAN	
7	Ensure member has proper security clearance	PERSEC	
8	Ensure member meets weight standards (if applicable)	Weight Instruction	
9	Complete PCS/TEMDUINS to "A" School worksheet (CG PSC-2001) if member is going TDY to "A" School.	Local Policy	
10	If the TDY period is expected to be over 30 days, send a copy of the order, endorsed with the date and time the member departed, to the SPO so that pay entitlements affected by TDY can be stopped/started	PPPM, 2-B-24 **Direct Access Online User Guide**	
11	**If** / **And** / **Then** the member has dependents / the TDY period is expected to be over 30 days / provide the member with an FSA Worksheet Instruct the member to complete and submit the FSA Worksheet the SPO, with a copy of the TDY order on the 31st day away from the permanent duty station	PPPM, 7-B-3	
12	Forward SPO PDR to TDY unit's SPO if TDY over 60 days	PDR Instruction	

Continued on next page

Temporary Duty (TDY) Checklists, Continued

TDY Duty Site checklist Use this checklist for members TDY at your duty site:

Step	Action	Reference	Date
1	Receive copy of TDY order		
2	Verify member reports for TDY. If member fails to report, notify the permanent unit.	PPPM, 10-B-4	

TDY return checklist Use this checklist when a member returns from TDY

Step	Action	Reference	Date
1	Ensure member traveled in accordance with the order. If member was required to deviate from the order as issued, ensure any necessary amendments and/or endorsements have been affixed to the original order	JFTR, 4400	
2	Ensure member submits travel claim to supervisor within 3 working days of return	PPPM, 2-B-4	
3	Ensure supervisor reviews the travel claim and signs and dates block 16 within 2 working days	PPPM, 2-B-4	
4	Provide the SPO with a copy of the order, endorsed with the date and time that the member returned to the unit and a copy of the member's travel voucher, so that the pay entitlements affected by TDY can be stopped/started	**PPPM, 2-B-23**	
5	Ensure the travel claim, original order, and receipts are forwarded to PSC (TVL)	PPPM, 2-B-4	
6	Forward Career Development Worksheet PSC-2030, to SPO to report school completion or addition of enlisted qualification codes.	PPPM, Encl (1)	
7	Review and complete PCS/TEMDUINS to "A" School (CG PSC-2001) if member is returning from TDY to "A" School.	PPPM, Encl (1)	
8	**Submit Direct Access transaction to change BAS** (unless the member is not required to eat at a government messing facility at both the permanent unit and the TDY unit).	**Direct Access Online BAS Guide**	

Reimbursement Methods

Introduction

This section covers various reimbursement methods used during TDY.

Per Diem Definition

Per Diem is a daily fixed allowance based on geographic locality used to reimburse travelers for lodging, meal and incidental expenses incurred while performing official travel. This allowance is separate from transportation and other miscellaneous expenses.

Note: Current locality per diem rates are available on our Web Site at http://www.uscg.mil/hq/PSC/

Per Diem Types

- Normal Lodging Plus Rate (LDP)
  Entitlement to per diem is based on the actual lodging cost incurred plus meals and incidental expense (M&IE) allowances. The total amount is limited to the maximum locality rate established for the TDY area. This per diem type is known as the Lodging Plus (LDP) System. See Joint Federal Travel Regulations (JFTR), Chapter 4.

  ♦ *Note:*
  1. *This type of per diem is commonly listed on orders as "Government Quarters & Messing Not Available."*
  2. *For INCONUS daily lodging, taxes are **not** included in the daily amount. These taxes are an allowable reimbursable expense under the "miscellaneous reimbursement section." OUTCONUS lodging taxes are included in the daily lodging amount.*

Continued on next page

Reimbursement Methods, Continued

Per Diem Types, continued

- Actual Expense (AE) & Super Actual Expense (SAE)
  For circumstances where lodging plus per diem reimbursement would not be sufficient to cover traveler expenses, entitlement to an actual expense allowance may be authorized. Actual expense (AE) permits the traveler to exceed the maximum locality rate for both lodging and M&IE expenses. When the traveler is authorized to exceed the maximum lodging portion only, the per diem rate is actual expense for lodging with the M&IE portion at the LDP rate (AELP). Normally actual expense is limited to 150% of the maximum locality rate for the area where duty is performed. In certain cases, such as short notice TDY or TDY in seasonally high cost areas, actual expense may be authorized not to exceed 300% (SAE). Actual expense cannot be a blanket authorization. Each trip and locality must be authorized separately listing the locality, dates, and amounts. See JFTR, U4200.

  Note: This type of per diem is listed on orders as either "Government Quarters & Messing Not Available, Authorized Actual Expense not to exceed $_____ per day or Actual Expense Authorized for Lodging only not to exceed $_____ per night for the dates of _____ through _____."

  Example: Locality is city "A" – Maximum is $80.00 per day
  Lodging - $50.00 & M&IE - $30.00
  150% Actual Expense for Lodging & M&IE is
  150% x $80.00 = $120.00 per day for lodging & M&IE
  150% Actual Expense for Lodging only is
  (150% x $80.00) - $30.00(M&IE) = $90.00 per night for lodging.

- Training (TNG)
  When military traveler's attend various courses of instruction and are required to use government quarters and unit essential messing, per diem is paid at the current government meal rate (unless provided meals at no cost) and an incidental rate of $2.00 for INCONUS or $3.50 for OUTCONUS. Travelers may also be reimbursed for government quarters fees, if charged. See JFTR, U4125.

- Field Duty
  Travelers on field duty are not entitled to per diem unless circumstances per reference JFTR, U4105.D apply. The period during which this prohibition is in effect begins at 0001 on the day after the day on which field duty begins and ends at 2400, the day before the day on which it ends. See JFTR, U4102.L & U4105.D.

Continued on next page

Reimbursement Methods, Continued

Per Diem Types, continued

- Sea Duty (SD) or Government Ship (GS)
  Military members are not entitled to per diem for any period of TDY or training while in a sea duty status or aboard a government vessel. Per diem entitlement ceases at 0001 on the day after the date of arrival aboard and ends at 2400 on the day before the date of departure from the vessel. This duty is considered unbroken when a member transfers from one vessel to another and the transfer is made within a 10 hour period. See JFTR, U4102
- Special or Reduced Per Diem (SPR)
  Special or Reduced per diem is a flat rate that is below the normal lodging and M&IE rate for the locality. This per diem rate must be approved by COMDT (G-WPM-2) and are established for a particular mission/operation. If used, the special rate must be listed on the travel order. See JFTR, U4135.
- Inpatient
  There is no per diem entitlement for travelers in an inpatient status. However, travelers who must remain on TDY at a medical facility for follow-up appointments or therapy are entitled to per diem allowances. See JFTR, U7125.
- Assigned to Rehab Center (REH)
  There is no per diem entitlement for travelers while assigned TDY to a rehabilitation center where both government quarters and mess are available. See JFTR, U7125.
- No Per Diem (NP)
  There are some other circumstances where per diem is not authorized for travel. Some examples are:

  - Travel or TDY Within PDS Limits - Except as for JFTR, U4105.H per diem is not payable for travel or TDY within the limits of the PDS.
  - Round Trips Within 12 Hours - Per diem is not payable for any period of TDY that is performed entirely within 12 hours.

  Note: 1. See JFTR, U4100 & U7125 for more info about non-per diem status.
  2. Occasional meals may be reimbursement for certain circumstances for the above types duty. See JFTR, U4102.

Continued on next page

Reimbursement Methods, Continued

Travel Settlement Defaults

TDY travel rules have several 'defaults' or assumptions when information is inadequate or absent on the travel order. The protection against these defaults is a TDY order that contains clear, adequate, and correct information. The defaults include:

- Government Messing

Default meal settlement standard (JFTR, U4400). When Travel Orders do not direct the government or proportional meal rate, the locality meal and incidental (M&IE) rate shall be paid.

- Quarters

Government Quarters are available ONLY IF use is directed in the Official Travel Order.

- Transportation

Unless the order-issuing official directs a specific transportation mode(s) or any exception(s), transportation expenses will be paid on the assumption common carrier air transportation is the most cost efficient and expeditious way to travel. For ticketing purposes, always use an in-house Travel Office, Contract Travel Office (CTO), or Travel Management Center (TMC) to ensure the traveler receives the government contracted reimbursable rate. See JFTR, Chapter 3.

- Other Expenses

ONLY EXPENSES which are pre-authorized and clearly implied by the order (e.g., transportation to/from common carrier terminals when common carrier transportation is necessary) or specifically addressed by the order (e.g., rental car) are available to the traveler.

- Receipt Requirements

A receipt must show what and when specific services were rendered or articles purchases, and the unit price. See JFTR, U2500.

Receipts are required for:

1. Lodging expenses regardless of amount, and
2. Any claimed expenditures of $75.00 or more.
3. Commercial travel (airfare, train, etc.)

Submission of Manual Travel Claims

Introduction

This section will guide you through the process of finishing up your travel voucher and submitting it to your supervisor for review.

The Travel Claim Package

The following items are required for each travel claim:

- Original Travel Voucher
- Original travel orders, including any amendments or endorsements. (For Document Type 13, Repeat Travel Orders: order issuing activity will retain all original orders; orders must indicate in the remarks block the name, phone number and e-mail address of the office where the originals are on file.
- Original itemized receipt for lodging expenses no matter the amount.
- **Original Airfare, or primary commercial transportation, receipt.**
- Original receipts for reimbursable expenses of $75 or over. For lost receipts, sign a statement as below in block 29 of your travel claim:

  Lost original receipt(s). I will not make another claim against the government for this item on this TONO. Signature_____

  NOTE: Please itemize your costs (i.e., how much spent for each item). For hotel receipts it is necessary to provide the name of the hotel, phone number, address and a point of contract at the hotel for verification.
- Endorsement(s) or SF-1038 for advance travel payment(s), if any.

Travel Voucher Submission

Review the travel claim package to ensure it is complete, correct; and that all entitlements are claimed. Review with the "Traveler's Checklist".
Prior to submitting the travel claim package to your supervisor for admin review, make a complete copy for your records. It is important to keep a copy in case you need to submit a supplemental claim or the claim is lost in the mail. You must retain copies of your travel claims for six years and three months from the date of settlement of the claim. PSC (TVL) will not return the original travel claim package.

- Securely staple the travel claim package to prevent loss of receipts or separation of package. (Refrain from using paper clips).
- Remember that you must submit your travel voucher to your supervisor within three days of completion of travel.
- It is up to your supervisor to complete the administrative review and forward the entire package to PSC (TVL) for processing.

Continued on next page

Submission of Manual Travel Claims, Continued

Payment

If all documentation is correct, PSC (TVL) will process your claim then electronically transmit the payment information to the Coast Guard Finance Center (FINCEN) for payment.

NOTE: If you want direct deposit sent to an account other than your current payroll account, complete and forward a Direct Deposit Fast-Start Form (SF-1199A) (available from your financial institution) or a CG PSC-2015, Pay Delivery Worksheet (Enclosure (1) to this manual) to the Coast Guard Finance Center. For the Pay Delivery Worksheet, mark the form "For Travel Claim Payment Only."

Non-receipt of Payment

Allow 10 working days from the date the Travel Voucher Summary is received to the date you receive payment. If payment or notification of overpayment/ claim rejection is not received by the end of this period, contact:

- Coast Guard Finance Center's automated voice response toll-free number 1-800-564-5504. Enter your social security number to receive information for the last five travel claims processed.

If the Finance Center has no record of the travel payment, contact PSC's Customer Service Team for assistance (Travelers using Industrial site accounting should contact their respective site). They will assist the unit/ traveler to verify the claim was processed, the amount due, and the date travel payment authorization was sent to the Finance Center. Email Travel's Claim Assistance Team at PscCustomerCare@hrsic.uscg.mil or call:

(785) 339-2250 or 1-888-872-4885 (1-888-USCG-TVL)

Note: The toll-free number (888) is for travelers without access to an FTS line, (i.e., Reservists, Auxiliarists, separated members, etc.). Have a copy of the travel claim package or Travel Summary Sheet when calling.

- The Customer Service Team will research your claim and advise you the next working day of its status and any further actions you may need to take.

Note: If you have waited more than 15 working days from the date the claim was mailed you may call the Claim Assistance Team at the above numbers to ascertain the claim's status.

Continued on next page

Submission of Manual Travel Claims, Continued

Mailing Procedures

When submitting claims to PSC (TVL) for processing, use the address below

Address
COMMANDING OFFICER (TVL) COAST GUARD **PERSONEL SERVICE CENTER** P O BOX 3551 TOPEKA KS 66601-3551

Note: DO NOT fold travel claim documents. Mail (unfolded) in a large envelope with all documents and receipts stapled together as one package to reduce risk of lost documents. Using this PO Box for other than travel related materials would cause a significant delay in processing.

Rules for Claiming Official Phone Calls

Introduction

This section provides additional information for military personnel and civilian employees who are requesting reimbursement for official telephone calls or other communication charges.

Rules Concerning Official Calls for Military Personnel

Military personnel should follow these rules when claiming reimbursement for telephone calls or other communication charges incurred during the course of official business:

- Local calls may only be claimed when the calls were for official business, and you provide an itemized listing when you submit your travel voucher.
- Long distance calls are not reimbursable unless the order-issuing official has completed the certification in block 20 of the travel voucher.
- Travel Orders and their subsequent amendments will authorize reimbursement for communication services as approved by the order issuing activity.

Rules Concerning Personal Calls for Civilian Personnel

Civilian personnel should follow these rules when claiming reimbursement for telephone calls or other communication charges incurred during the course of official business:

<u>For calls made within the Continental United States:</u>

- Brief calls (less than 5 minutes) are allowed.
- A claim of no more than $5 may be made for each day while in a travel status.
- Reimbursement will not be made for more than one call per day.

<u>Outside the Continental United States</u>

- A claim of no more than five documented minutes may be made for each day while in a travel status.
- Reimbursement will not be made for more than one call per day.
- The maximum reimbursement allowed for telephone calls is $10 per day.

Accounting Data

Introduction

The most common cause for delay in processing travel claims is incorrect accounting data. This section will help determine whether or not the accounting data on your travel order is correct.

Document Number

The Document ID Number or Travel Order Number (TONO) consists of 16 digits. The first four digits represent the type of travel and Fiscal Year. The TONO should be similar to one of the following:

Type of order	Example
TAD	1198234PBZA73000
PCS, Retirement, Discharge	1298234P23704000
Blanket or Repeat	1398234ZM1233000

Note: Industrial site TONOs differ from this restriction.

Accounting String

The accounting string is used to charge the cost of travel to the appropriate unit and funding account. The string is represented by a series of alphanumeric characters. The general format of Coast Guard accounting line data is:

2/	F/	801/	136/	30/	0/	AB/	12345/	2673
Agency Code "2" for CG	Region/ District Code	Appropriation Code	Appropriation Limitation code	Allotment Fund Control Code	Allotment Level Indicator Code	Program Element	Cost Center	Object Class

Reimbursable Agreement Numbers (RAN)

Coast Guard travelers often travel TDY for other Government agencies (OGA), such as State Governments, EPA, Treasury, and other U. S. Armed Forces. When OGA offers to fund TDY, the unit must coordinate how that TDY will be reimbursed through FINCEN. It is simple:

Produce Travel orders and assign a routine TONO & Accounting String

Note: In Accounting line, change AFC 30 to read 80. Ensure TONO region corresponds to Program Element.

An example of a RAN accounting string and TONO follows:

- ACCT String: 2/H/801/899/80/0/WA/77950/2152
- TONO: 1198238HWA026000

Note: The region H is the 8th character of the TONO. The Program Element WA is the 9th & 10th character of the accounting string. AFC: 30 is also changed to read 80.

Note: These accounting restrictions do not apply to Industrial accounts.

Continued on next page

Accounting Data, Continued

Document Type 33 and DITY Moves

Claims for reimbursements of Document Type 33 (Miscellaneous items) and Do-It-Yourself (DITY) moves should be forwarded to the Coast Guard Finance Center (FINCEN) for processing. PSC (TVL) does not process these types of claims.

Send Document Type 33 and DITY move claims to:

COMMANDING OFFICER (33)
U S COAST GUARD FINANCE CENTER
1430 A KRISTINA WAY
CHESAPEAKE, VA 23326-1000

ATTN: MISC. REIMB.

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Section Overview

Introduction

Active Duty for Training (ADT) includes:

- Active Duty for Training for Annual Training (ADT-AT)
- Initial Active Duty for Training (IADT)
- Active Duty for Training - Other Training Duty (ADT-OTD)

ADT is a tour of Active Duty that is used for training members of the reserve components to provide trained units and qualified persons to fill the needs of the Armed Forces during war or national emergency and such other times as national security requires. Section 3-A of the RPM defines these duty types in detail. This section will focus on the procedures and processes governing ADT.

In this section

Topic	See Page
The ADT Process	2-C-2
Amendments to ADT Orders	2-C-5
Preparation of Annual Screening Questionnaire	2-C-6

The ADT Process

ADT order processing

This table describes the stages of ADT order processing.

Reference

(a) RPM
(b) Direct Access Online Guide

Stage	Who Does It	When	What Happens
1	Member & Supervisor	At least 45 working days prior to the date of ADT	• Discuss desired consecutive duty dates. • Coordinates duty days with unit.
2	Member or unit	At least 45 working days prior to date of ADT	• Complete the Request for ADT Orders through Direct Access (Reserve Orders module) Although it is not the preferred method, the member may complete a Request for ADT Orders (CG-3453) and forward to the unit for input into Direct Access. • Forward to ISC (pf) through Direct Access (via the unit if applicable).
3	Unit	Within 2 days of receipt of request	• Approve request in Direct Access and forward to the servicing ISC (pf) for final approval or • Disapprove request and forward back to member/unit.
4	ISC (pf)	Within 5 days of receipt of request	• Act upon the Request for ADT Orders in Direct Access. • If member is performing IADT Phase II and attending class “A” School, complete the Departing for TDY or PCS/TEMDINST To “A” School Worksheet (CG PSC-2001). • Ensure the member has a security clearance if required while on ADT. • If ADT is over 90 days, forward Medical/Unit PDR to ADT site.

Continued on next page

The ADT Process, Continued

Stage	Who Does It	When	What Happens
5	SPO **** Note, Verify that member is not in receipt of any type of disability, compensation, pension or retired pay from the Department of Veterans Affairs.***	Within 2 days of receipt of an approved request	• Completes the Reserve Travel Orders and Arrival/Departure tab of the Reserve Orders in Direct Access. • Complete Direct Access start entitlement transactions if the member is entitled to SDAP or COLA while on ADT. • Maintain approved request and copy of orders in SPO files and PDR for 1 year. • Mail original Travel Orders/CG 5131 to member (orders for the units and ISC (PF) will be available on the airport terminal). In cases where the ADT is for 60 or more days (e.g., IADT Phase II to "A" School): 1. Review and mail the SPO PDR to the SPO servicing the ADT site. 2. Set up tracking of completion date of ADT period.
6	Member	As directed by orders	Report to ADT site
7	ADT site	Member reports for ADT	Notify SPO if member deviates from orders by reporting at a different time or fails to report.
8	ADT site	Member completes ADT	• Endorse Travel Orders to show: (1) date and time member reported and departed, and; (2) availability of Gov't qtrs/mess. • Fax copy of endorsed Travel Orders to member's home SPO on the same day. • Complete a performance evaluation using Direct Access.

Continued on next page

The ADT Process, Continued

Stage	Who Does It	When	What Happens
9	SPO	Within 2 days of receipt of endorsed Standard Travel Orders	• If necessary submits action to correct Pay and Points for Reserve Active Duty Periods of Less Than 139 Days via Direct Access IAW reference (b). • If ADT was over 29 days submit Direct Access transaction (Process Lump Sum Leave). • Submit Direct Access transaction to stop SDAP/COLA if appropriate. • In IADT cases, verify that the reservist's school completion and advancements/designator assignment have been recorded in Direct Access.
10	Member	Within 3 days following completion of travel	Complete DD-1351-2 (Travel Voucher) and forward to unit with original Travel Orders.
11	Unit	Within 2 days of receipt from member	Complete administrative review of travel voucher and forward to PSC (TVL) for processing.
12	PSC (TVL)	Upon receipt of voucher	Process travel voucher for payment of travel entitlements.

Amendments to ADT Orders

When orders can be amended

Orders can be amended after the fact to document verbal authority given during the ADT travel period when unforeseen requirements emerge that require the member to incur costs not originally anticipated.

Travelers seek modifications or changes to their orders through the Order Issuing official that directed and funded the travel. The form of the amendment should identify the:

- Traveler
- TONO/ACCTNG Data
- Entitlement specified
- Reason for change

This information should be attached (memo, letterhead, or handwritten note) to the original travel order.

Situations when amendments are not authorized

There are some provisions that, if not authorized in the order BEFORE travel starts, CANNOT be approved for payment after travel is completed.

Example: An order DIRECTING use of common carrier cannot be amended after the fact to permit some other form of transportation when common carrier was the order issuer's intended form of transportation for the member.

Amendments cannot be used to deny an entitlement

UNDER NO CIRCUMSTANCES CAN AN ORDER BE AMENDED AFTER THE FACT TO DENY A TRAVEL ENTITLEMENT CONTAINED IN THE ORDER

Example: An order can't be amended after the fact to "unauthorize" a rental car authorized by the order in order to deny payment to the traveler.

Preparation of Annual Screening Questionnaire

Introduction

Federal law requires that all Ready Reservists (Selected Reservists (SELRES) and Individual Ready Reservists (IRR)) be regularly screened to ensure their availability and fitness for duty if mobilized and submit updated information to their chain of command. Coast Guard reservists will complete the screening annually during the month of October.

Note: Members who are on Extended Active Duty or serving on a recall to active duty and those who have completed a questionnaire within the four months preceding 1 October are not required to submit a new questionnaire for the current year. The questionnaire is designed to be done as often as the information or recall availability changes at anytime of the year.

References

- 10 USC 10149
- ALCOAST 485/02
- ALCOAST 558/02
- RPM
- Screening of the Ready Reserve DODD 1200.7

Process Overview

Drilling Selected Reservists, who have provided Direct Access with an email address, will be reminded annually, via email, to complete and submit the questionnaire in Direct Access. Questionnaires will be printed and mailed, by PSC, to reservists who do not have access to Direct Access or do not have an email address in Direct Access. The printed questionnaires included instructions to mail completed forms back to PSC. PSC will sort and forward completed questionnaires to the responsible servicing SPOs for Direct Access data entry.

Members with access to Direct Access will complete the Annual Screening Questionnaire using Self-Service. SPOs will enter questionnaires on behalf of those members without access to the system.

Reservists who cannot access Direct Access and do not receive a questionnaire from PSC may use CG PSC-3799R, from enclosure (1) of this manual, to provide screening information to the servicing SPO.

Continued on next page

Preparation of Annual Screening Questionnaire, Continued

Supervisor Notification

When members indicate on the Annual Screening Questionnaire they are not available for recall or do not understand their mobilization requirement Direct Access prompts them (or the SPO operator if entering a questionnaire on behalf of a member who cannot access Direct Access) for a supervisor's Operator ID for follow-up counseling or action (transfer to IRR or discharge). The email function to supervisor is only active when the reservist chooses "do not accept/understand mobilization requirement" or any selection other than "available for mobilization." A view-only link of the reservist's Annual Screening Questionnaire is added to the supervisor's worklist.

Supervisor Action

Supervisors must contact and counsel those members who indicate they are not available for recall or do not understand their mobilization requirement. If the counseling results in the member being able to indicate they are available for mobilization a new Annual Screening Questionnaire must be submitted. Members who are not available for mobilization should be processed for transfer or separation as appropriate (consult the references cited at the beginning of this section for additional guidance).

Procedures

Procedures for completing the Direct Access Annual Screening Questionnaire are available in the system’s online help. Questionnaires mailed by PSC and CG PSC-3799R (from enclosure (1) to this manual) includes complete instructions.

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Section Overview

Introduction

Active Duty Other Than Training (ADOT) includes:

- Involuntary Active Duty
- Voluntary Active Duty for Emergency Operations
- Active Duty for Special Work (ADSW)

This section will focus on the procedures and processes governing ADSW-AC, (formerly TEMAC). This duty may be performed by reservists in the Selected Reserve, Individual Ready Reserve (IRR) or the Standby Reserve (Active Status). Note: IRR and Standby Reserve include those referred to as Active Status Pool (ASP).

References

- RPM
- COMDTINST 1330.1 (series) (Temporary Active Duty)

In this section

Topic	See Page
Projecting Costs of ADSW-AC Orders	2-D-2
Document ID's (TONO) for ADSW-AC Orders	2-D-3
Accounting Line Data for ADSW-AC Orders	2-D-4
How to Process an ADSW-AC Order	2-D-6

Projecting Cost of ADSW-AC Orders

Introduction

All ADSW-AC costs, including pay and benefits, travel and per diem, and permanent change of station (PCS) entitlements (when applicable) are normally the responsibility of the commands using ADSW-AC. Commands using long-term ADSW-AC should keep in mind those personnel assigned to a unit for over 20 weeks are entitled to PCS entitlements. Assignments cannot exceed 360 days and cannot cross fiscal years.

References

- PERSMAN, Art 4.G, 7.A.19-20
- PAYMAN, Chapter 12
- Joint Federal Travel Regulations (JFTR), U7G

Estimating Total Cost

The Benefiting Unit shall determine the cost of Pay and Allowances, FICA and Travel and record it in Section III (Document ID and Accounting DATA) of form CG-3453 (Rev. 7/98). If the period of ADSW-AC covers a portion, rather than a full 15 day pay period, (i.e.: 25-30 June vice 16-30 June), compute the pay and allowances for the partial period by dividing a full month's entitlement by 30 days then multiply that daily amount by the number of days. Compute total cost taking the following into account:

<u>Pay and Allowances</u>

- Base Pay (including longevity increases)
- BAH/OHA
- Subsistence (actual days)
- FSA (if period of ADSW-AC is over 30 days refer to page 7-B-3)
- CONUS COLA or COLA
- Leave to be earned and sold
- Any other station allowances

<u>FICA</u>

- Multiply .0765 x one month's base pay. This amount is reduced from the base pay accounting line and added to the FICA accounting line.

<u>Travel Entitlements</u>

- Travel costs to and from the ADSW-AC site
- Per diem for travel days

Note: Travel Entitlements are not payable if ADSW-AC site is within the geographical limits of the members' home.

Document ID's (TONO) for ADSW-AC Orders

Introduction

The Benefiting Unit shall provide three separate Document ID's in Section III of form CG-3453 (Rev. 7/98) "Request For Reserve Orders. The DOC Type 72 is used to pay the member in JUMPS. The DOC Type 11/12/13 is used to pay the member for travel in IATS.

References

FINCEN SOP, FINCENSTFINST M7000.1, Chapter 5

Document Number Examples

- 11/99/29/9/8/16/001/000 (for TVL)
- 72/99/29/9/8/16/001/000 (for P&A)
- 72/99/29/9/8/16/001/001 (for FICA)

DOC ID TABLE

This table gives guidance on each part of the document number.

Field	Function
11 - Document Type	Use DOC type 11 for all Reserve Travel Orders with a consecutive duration under 20 weeks. Use 13 for non-consecutive duty under 20 weeks. Use 12 for PCS Travel Orders (duty over 20 weeks). Use 72 for Pay and Allowances and FICA.
99 - FY Funded	Last two digits of the FY in which the transaction will be funded.
29 - Procurement Site Code	"29" represents the Eighth District Office. A listing is found in Appendix H to the FINCEN SOP. This number should remain constant for each office.
9 - FY Contract Originated	Last digit of the fiscal year of the initial document.
8 - Region	Region/district from Appendix A, FINCEN SOP. "8" stands for Eighth District.
16 - Program Element (PE)	For most units, this field will be constant. Those units that have several program elements or other than normal 2-digit PE's should use a master 2-digit PE assigned by their Budget Office for document numbering purposes. For reserve orders use only the first two characters of the Accounting Line Program Element.
001 - Document Sequence	Assigned by the unit for expenditure of funds.
000 - Suffix	Subdivision within expenditure. For ADSW-AC Orders, use 000 for Travel and Pay & Allowances, and 001 for FICA Entries.

Accounting Line Data for ADSW-AC Orders

Introduction

The Benefiting Unit shall provide three separate Accounting Lines in Section III of form CG-3453 (Rev. 7/98) "Request For Reserve Orders.

References

FINCEN SOP, FINCENSTFINST M7000.1, Chapter 4

Accounting Line Data:

- 2/8/901/108/30/0/16xx/12345/2100 (Travel)
- 2/8/901/108/30/0/16xx/12345/117K (P&A)
- 2/8/901/108/30/0/16xx/12345/122R (FICA)

Accounting Line Table

This table gives guidance on each part of the document number.

Field	Function
2 - Agency Code	Indicates the Coast Guard. It will always be "2".
8 - Region/District Code	Normally constant for a particular unit. Example: 8 for Eighth District, F for FINCEN.
901 - Appropriation Code	Last digit of the fiscal year. (9=1999). Remaining digits are the appropriation account. For ADSW-AC use "01".
108 - Appropriation Limitation Code (ALC)	First digit is type of funding, direct or indirect. Use "1, 2, 3 or 8" as per Appendix C of reference (a) for Reserve Orders. 1=Direct Funds, 2=Direct Funds (pickup accounts), 3=Direct Funds (HQ Refund Program), and 8=Reimburseable Funds. Second two digits is Administrative Target Unit (ATU): 01 for First Coast Guard District, 07 for Seventh Coast Guard District, 36 for FINCEN, etc. Some ATU's have four digits such as LANTAREA, which is 2032.
30 - Allotment Fund Control Code (AFC)	Most units and staff elements will use a constant 30 in this field. Day to day CG operations are generally funded through AFC 30.
0 - Allotment Level Indicator Code (ALIC)	This field will always be 0.
16 - Program Element (PE)	This is the "source of funds" for procurement. Up to six positions may be used for projects in other appropriations. Some large units have multiple Program Elements. For most units, this field will be constant.

Continued on next page

Accounting Line Data for ADSW-AC Orders, Continued

12345 - Cost Center	• Normally the benefiting units OPFAC.
117K - DOT Standard Object Class	• 117J - Commissioned & Warrant Officers Pay & Allowances • 117K - Enlisted members Pay & Allowances • 122O - FICA Tax - Officers • 122R - FICA Tax - Enlisted • 2100 - General Operational Travel. The travel object class may vary. See FINCEN SOP, Appendix F, 2100 series for a complete listing of travel related object class codes.

How to Process an ADSW-AC Order

Introduction The below stages shall be followed in the ADSW-AC Order Process

References RPM, Art. 3-D-12
Medical Manual, COMDTINST M6000.1B, Art 3.A.7.j.(1)

ADSW-AC Order Processing This table describes the stages of ADSW-AC order process **where Direct Access cannot be utilized.**

Stage	Who Does It	When	What Happens
1	Member & Supervisor	At least 45 working days prior to the date of ADSW-AC	• Discuss desired consecutive/non-consecutive duty dates. • Coordinates duty days with unit.
2	Member or unit	At least 45 working days prior to date of ADSW-AC	• Complete the Request for ADSW-AC Orders through Direct Access (Reserve Orders module) Note: Although it is not the preferred method, the member may complete a Request for ADSW-AC Orders (CG-3453) and forward to the unit for input into Direct Access. • Forward to ISC (pf) through Direct Access.
3	Supervisor	Within 2 days of receipt of request	• Approve request in Direct Access and forward to the servicing ISC (pf) for final approval or • Disapprove request and forward back to member/unit.
4	ISC (pf)	Within 5 days of receipt of request	• Act upon the Request for ADSW-AC Orders in Direct Access. • Ensure the member has a security clearance if required while on ADSW-AC. • If ADSW-AC is over 60 days, forward Medical/Unit PDR to ADSW-AC site.

Continued on next page

How to Process an ADSW-AC Order, continued

Stage	Who Does It	When	What Happens
5	SPO **** Note, Verify that member is not in receipt of any type of disability, compensation, pension or retired pay from the Department of Veterans Affairs.***	Within 2 days of receipt of an approved request	• Obligated service to cover the ADSW-AC period. • Verify direct deposit. • Complete Standard Travel Orders using the Reserve Orders transaction in Direct Access. • For consecutive ADSW-AC, attach a blank Non-Consecutive Active Duty Endorsement Sheet, CG-5131A, to the Standard Travel Orders. • If non-consecutive duty is authorized, complete Direct Access transaction if the member is entitled to SDAP or COLA while on ADSW-AC. • Maintain approved request and copy of orders in SPO files and PDR for 1 year. • Mail original Travel Orders/CG 5131A to member with copies to the members unit, the unit where the ADSW-AC will be performed, and servicing ISC (PF). In cases where the ADSW-AC is for 60 or more days: 1. Review and mail the SPO PDR to the SPO servicing the ADSW-AC site. 2. Set up tracking of completion date of ADSW-AC period.
6	Member	As directed by orders	• Obtain new I.D. card at nearest issuing unit if ADSW-AC is over 30 days. • Report to ADSW-AC site.
7	ADSW-AC site	Member reports for ADSW-AC	• Notify SPO if member deviates from orders by reporting at a different time or fails to report. • If duty is non-consecutive complete CG-5131A, “Non-Consecutive Active Duty Endorsement Sheet”, following instructions on the form.
8	ADSW-AC site	Member completes ADSW-AC	• Endorse Travel Orders or CG-5131A to show: (1) date and time member reported and departed, and; (2) availability of Gov’t qtrs/mess. • Fax copy of endorsed Travel Orders (and CG-5131A for non-consecutive duty) to member’s home SPO on the same day. • Complete a performance evaluation using Direct Access.

Continued on next page

How to Process an ADSW-AC Order, Continued

Stage	Who Does It	When	What Happens
9	SPO	Within 2 days of receipt of endorsed Standard Travel Orders/CG-5131A	• For consecutive ADSW-AC, if necessary submits corrected action via Direct Access IAW section 2-B of reference (b). • For non-consecutive ADSW-AC, completes Direct Access transaction IAW section 2-B of reference (b). • Submit Direct Access transaction if ADSW-AC was over 29 days. • Submit Direct Access transaction to stop SDAP/COLA if appropriate. • In IADSW-AC cases, verify that the reservist's school completion and advancements/designator assignment have been recorded in Direct Access.
10	Member	Within 3 days following completion of travel	Complete DD-1351-2 (Travel Voucher) and forward to unit with original Travel Orders.
11	Unit	Within 2 days of receipt from member	Complete administrative review of travel voucher and forward to PSC (TVL) for processing.
12	PSC (TVL)	Upon receipt of voucher	Process travel voucher for payment of travel entitlements.

Chapter 3 ACCESSIONS, SEPARATIONS, AND REENLISTMENTS

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for accessing, separating, or reenlisting a member. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Accessions	3-A-1
B	Separations	3-B-1
C	Continuance on Active Duty	3-C-1

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Section Overview

Introduction

This section will guide you through the process of accessing a member onto active duty.

In this section

Topic	See Page
Process for Accessions	3-A-2
Types of Accessions	3-A-4
Recalled Retired Members	3-A-5

Process for Accessions

Introductions

The accession process depends on communication between the member, unit, and SPO to ensure a smooth transition into the Coast Guard. This process is broken down into stages based on what needs to be completed and who is responsible.

Process

This is the process.

Stage	Who Does It	What Happens
1	Member	Member completes the following: • DD Form 2058, State of Legal Residence Certificate • IRS W4 Form • Appropriate state tax withholding certificate • Direct Deposit information • CG PSC-2020D (Designation of Beneficiaries) • CG PSC-2020 (Dependency Worksheet) *if member has dependents* • DD-1172 (Application for Uniformed Service Identification Card) • DD-1173 (Uniformed Service Identification and Privilege Card) *if member has dependents* • SGLV-8286 (if member does not want automatic $250K SGLI coverage) • SGLV-8286A (if member desires Family SGLI coverage) • TSP-U-1 (if member desires to participate in TSP) • TDP Enrollment Form (if member has dependents & desires to enroll them in the TRICARE Dental Plan) • DD 2366 (Montgomery GI Bill Election Form) *if member is eligible to enroll in MGIB* • CG PSC-5100 (Officer Uniform Allowance Claim Worksheet) *for eligible officers*

Continued on next page

Process for Accessions Continued

Process
Continued

2	Unit	Assist member in completing PCS Reporting Worksheet (PSC 2005) forwards to SPO with other related forms from Stage 1
3	SPO	• Creates PDR • Submits Direct Access transactions • Contacts unit for additional information if needed. • If applicable starts MGIB allotment **Note:** For members who are changing components of the Coast Guard with no break in service, the SPO must ensure that a separation transaction in Direct Access has been completed and approved on the member prior to transmitting accession (rehire) transactions.

Types of Accessions

Introduction

Accession is the process of establishing personnel and pay records when a member comes on active duty. There are several ways to be accessed and several points where members can be processed.

Types of accessions

This table describes types of accessions and identifies processing points.

Types	Description	Processing Points
Direct commission	When an officer comes from the civilian sector and is processed through officer basic training before departing for their first unit.	Academy
Cadet Graduates	When a Cadet graduates from the Academy and becomes an officer.	Academy
Cadet	When a Cadet reports to the Academy.	Academy
Former Cadet with a reserve obligation	Non-Prior service cadets whose appointment is terminated in their junior or senior year are assigned to the Coast Guard Reserve SELRES Transition Pool for 59 days and subsequently assigned to either the IRR or a drilling unit to complete their military obligation.	Academy
Prior service	**When an enlisted member comes from another service and attends Basic Training.**	Cape May
	When a member comes from prior CG or CG Reserve and reports directly to a unit without going through basic training. **Note:** This includes members who are being discharged from the active duty component of the Coast Guard to be immediately accessed into the reserve component of the Coast Guard and vice versa. **The servicing SPO losing the member must submit the discharge transaction in Direct Access and accession transaction within 24 hours.**	Responsible SPO or designated unit.
	When a member reports directly to the Individual Ready Reserve (IRR).	Servicing ISC SPO
	If the member enlists in the reserves and attends Cape May as a REBI student.	The SPO that services the member's first permanent duty station
Recruits	When an enlisted member goes to basic training before departing for their first unit.	Cape May

Recalled Retired Members

Introduction

The Commandant may direct that a retired member be recalled to active duty. These members may be paid by PSC (RAS) or by PSC (MAS) through JUMPS depending on the duration of the recall.

Payment Method

Use this table to determine if the member will be paid by PSC (MAS) or by PSC (RAS).

If the member is	and the duration of the recall is	then the member is paid by
Immediately recalled to active duty upon retirement (no break in service)	for any period immediately following retirement	• JUMPS. • The Assignment Officer will issue Recall from Retirement Orders via Direct Access. These orders will generate a P193 JUMPS action and continue the member on Active Duty. • No need to retire member.
Recalled to active duty after a break in service of more than 24 hours	for any period	• JUMPS. • CGPC creates orders. • SPO does contract data and PCS endorsements to access (rehire) the member.
Recalled from RET-2 status	for any period	• The Assignment Officer will issue orders to the member. • The SPO will record the member's active duty in Direct Access.

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Section Overview

Introduction

This section prescribes procedures for separating members on active duty whose obligated service is for 140 days or more.

In this section

Topic	See Page
The Separation Process	3-B-2
Immediate Separation Processing	3-B-5
Priority Separation Processing	3-B-7
E-mail Format For Immediate and Priority Separations (Exhibit 3-B-1)	3-B-9
Routine Separation Processing	3-B-10
Cancellation of Document Numbers and Accounting Data (Exhibit 3-B-2)	3-B-12
Preparation of Separation Orders (Exhibit 3-B-3)	3-B-13
Enlisted to Cadet Status Processing	3-B-14
Regular Retirement Separations	3-B-15
Disability Retirement Separations	3-B-16
Checklist for Separations	3-B-17
Checklist for RELAD	3-B-20
Checklist for Discharge	3-B-21
Checklist for Retirement	3-B-22
Reserve Retirement Separations	3-B-25

The Separation Process

Introduction

The proper execution of the separation process depends on close communication between all participants. Timely processing of all paperwork is essential to provide the member a smooth transition and to ensure separation payments are made consistent with applicable directives. TONOs are automatically generated when the Separation Orders are entered in Direct Access.

Note: Requests to change the termination date of discharge orders already posted on the Airport terminal must be sent to PSC (SES).

References

(a) DD 214 Manual
(b) SPD Handbook
(c) PERSMAN, Chap 12-A and 12-B

Retention on Active Duty

When a member is retained for any reason beyond the established separation date, documentation submitted to JUMPS to process the original separation must be deleted and modified/replaced with new transactions. This may require action by various sources:

WHO	MAY NEED TO
CGPC (opm)	extend an officer's date of separation
Member's SPO	submit a Personnel Action to indicate a member has been retained beyond normal expiration of enlistment.
PSC	reopen the member's pay account and reprocess the separation

Continued on next page

The Separation Process, Continued

Types of separations

Separations are classified as immediate, priority, or routine. Each type is defined below.

Type	Description
Immediate	Separations, which must be processed in less than 15 days. Separations require four working days for processing by PSC. This 4-day clock begins once: • The SPO notifies PSC of the authorization to separate the member. This may required coordination between the unit, SPO, and PSC (SES) to change the member's separation date.
Priority	Separations, which must be processed within a 15 to 30 day period.
Routine	Separations, which can be processed in 30 days or more. **Note:** 30 days is the minimum time in which a Routine separation can be processed. In order to avoid delay in the final payment or payment for any leave sold, units/members must submit the Career Intentions Worksheet (CG PSC-2045) to the SPO not later than 60 days prior to the separation date or departure on terminal leave.

Continued on next page

Which type to use

This table prescribes separation classifications.

IF Separation is	THEN use
due to misconduct and unit commanding officer desires rapid administrative action	Immediate
not due to misconduct, but rapid administrative action is required Requests may be made by command's (CO/XO) by contacting PSC (SES) at (785) 339-3550	Immediate
for reserve members disenrolling from a class "A" school, officer candidate school, or other training program	Immediate
due to unsatisfactory performance	Priority
due to unsuitability	Priority
due to physical disability	Priority
directed by CGPC (epm-1) for urgent reasons	Priority
under normal circumstances	Routine

Immediate Separation Processing

Introduction Immediate separations require 4 working days for processing after CGPC (epm-1) posts the orders on the airport terminal.

Procedures Procedures required for an Immediate separation.

Day	Who Does It	What Happens
1	CGPC (epm-1)	• Approves separation. • Posts separation orders with the Termination Date, TONO and Accounting Data to the airport terminal. The orders will contain detailed information to enable SPOs to prepare all documents required for separation.
	UNIT	• Ensures member is physically qualified for separation. • Notifies SPO upon receipt of separation authority from CGPC. **Note:** For immediate separations requiring less than normal processing time, a signed CG-3307 by the member (see Enclosure 6 of this manual, CG-3307's for Separation (SEP-1)) shall be faxed to (785-339-3784) PSC (SES).
T H R U 3	SPO	• Sends Urgent E-mail to PSC-SES on Day One with pertinent information using the format provided in Exhibit 3-B-1. • SPOs must contact PSC (SES) to request approval of immediate separations • SPOs must contact PSC (SES) to request a change to member's termination date set in Direct Access. Note: E-mail must be routed through and released by the SPO supervisor (with "By direction" authority). PSC is in the process of updating their email addresses. Currently SES email is in global under "HRSIC-SES", shortly it will be listed as "PSC-SES".

Continued on next page

Procedures, continued

Day	Who Does It	What Happens
1	PSC (SES)	Upon receipt of the SPO's E-mail. • Calculates the final pay due the member. • Sends E-Mail to the SPO with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, the SRB recoupment endorsement on the reverse side of the DD-214 (if applicable) and the amount of payment authorized.
T H R U 3	SPO	• Prepares the DD-214 • Prepares the appropriate Direct Access separation transactions. • Prepares appropriate separation letter(s) from enclosure (4) of this manual. • Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account. • Verifies/enters final mailing address in Direct Access. Note: The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W2.
4	UNIT	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Orders, appropriate travel claim forms, an envelope addressed to PSC (TVL) for liquidation purposes, and the standard separation letter.
	SPO	On the effective date of separation, transmits the separation transaction.

Priority Separation Processing

Introduction Priority separations require 15 working days for processing. Therefore, to allow for weekends and holidays, the effective date of separation will be 21 days after CGPC (epm-1) posts the orders on the airport terminal.

Procedures Procedures required for a Priority separation.

Day	Who Does It	What Happens
1 THRU 9	CGPC (epm-1)	• Approves separation. • Posts separation orders with the Termination Date, TONO and Accounting Data to the airport terminal. The orders will contain detailed information to enable SPOs to prepare all documents required for separation.
	UNIT	• Ensures member is physically qualified for separation. • Notifies SPO. **Note:** For Priority separations requiring less than normal processing time, a signed CG-3307 (use (SEP-1) in Encl 6 of this manual) must be faxed (785-339-3784) to PSC (SES).
	SPO	• Sends Urgent E-mail to PSC-SES on Day One with pertinent information using the format provided in Exhibit 3-B-1. • SPOs must contact PSC (SES) to request approval of immediate separations • SPOs must contact PSC (SES) to request a change to member's termination date set in Direct Access. **Note:** The E-mail must be routed through and released by the SPO supervisor (with "By direction" authority). PSC is in the process of updating their email addresses. Currently SES email is in global under "HRSIC-SES", shortly it will be listed as "PSC-SES".

Continued on next page

Procedures (continued)

Day	Who Does It	What Happens
1 T H R U 9 (Cont.)	PSC (SES)	Upon receipt of the SPO's E-mail. • Calculates the final pay due the member. • Sends E-Mail to the SPO with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, and the amount of payment authorized. • Schedules a special payment through Treasury to ensure member receives final separation pay on his/her separation date.
	SPO	• Prepares the DD-214 • Prepares the appropriate Direct Access separation transactions. • Prepares appropriate separation letter(s) from enclosure (4) of this manual. • Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account. • Verifies/enters final mailing address in Direct Access. Note: The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W2
LAST DAY	UNIT	On the effective date of separation, delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PSC (TVL) for liquidation purposes, and the standard separation letter(s).
	SPO	On the effective date of separation, or date of departure on terminal leave, transmits the separation transaction.

E-mail Format for Immediate and Priority Separations

(Not Requesting a Document Number and Accounting Data)

SUBJ: SEPARATION FOR ____(NAME/EMPLID)_____, USCG(R)

A. **CITE CGPC Separation Summary Authorization**

1. CITE TYPE OF SEPARATION: IMMEDIATE, PRIORITY, OR DISABILITY

NOTE: The CO/XO must call SES for all Immediate separations unless the member's SPD code ends with one of the following two characters:

FS FU JA JB JC JD JE KA KB KD KF KK KL KM KN KQ NC

2. DATE OF SEPARATION

3. SPD CODE

4. LEAVE INFORMATION (SPO must still input leave transactions)

A. DAYS LEAVE SELLING
B. NUMBER OF DAYS TERMINAL LEAVE TAKING AND THE DATES OF TERMINAL LEAVE
C. NUMBER OF DAYS LEAVE TAKEN AND THE DATES OF LEAVE, NOT POSTED IN RECENTS
D. NUMBER OF DAYS EXCESS LEAVE (Only if allowed by CO)

NOTE: Include any leave scheduled to be taken prior to separation. The SPO must still input the leave transaction(s). Enter 'NONE' in each block when not applicable.

5. LOST TIME NOT POSTED IN RECENTS

NOTE: Enter 'NONE' when not applicable.

6. PAY ADJUSTMENTS NOT POSTED IN JUMPS:

A. REDUCTION: RATE AND DATE
B. FORFEITURE: AMOUNT AND DATE
C. MUTUAL ASSISTANCE (follow procedures noted on page 9-A-5 of this manual)
D. OTHER INDEBTEDNESS (see page 9-A-4 of this manual prior to transmission of this e-mail)
E. ENTITLEMENTS NOT POSTED IN RECENTS (SPO must still transmit necessary transactions)
F. BONUS PAYMENTS PREVIOUSLY MADE (SRB, SELRES, or Enlistment Bonus)

NOTE: Enter 'NONE' when not applicable.

7. FINAL MAILING ADDRESS AFTER SEPARATION AS INDICATED IN **DIRECT ACCESS** ENTERED THIS DATE IS

8. SPO POINT OF CONTACT (name and phone number)

NOTE: When producing this e-mail, ensure each paragraph is typed out entirely (i.e., paragraph 2 would read "Date of Separation: 99Jan01" vice "99Jan01"), However you do not need to include notes.

EXHIBIT 3-B-1

Routine Separation Processing

Introduction Routine separations occur with sufficient lead-time to allow routine processing.

Procedures Procedures required for Routine separation.

When	Who does it	What happens
At least 180 days prior to Separation	UNIT	Ensures member is physically qualified for separation.
At least 45 days prior to Separation or departure on terminal leave	SPO	Prepares and transmits Statement of Intent. Note: Failure to submit this document in a timely manner will normally result in delay in final pay or payment for any leave sold. The SPO must notify PSC (SES) if there is any change to the statement of intent. On routine separations, the amount of final pay will appear on the member's prior month LES. • For routine separations the TONO and Accounting Data are automatically generated when the SPO creates and saves the Direct Access separation orders. For the separation orders follow the guidance on page 3-B-13.
Prior to separation	SPO	Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214.

Continued on next page

Routine Separation Processing, Continued

Procedures (continued)

When	Who does it	What happens
At least 10 days prior to separation	PSC (SES)	Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and the amount of payment authorized.
7 days prior to separation	SPO	If information required for block 18 of the DD-214 (if applicable) has not been received, contacts PSC (SES).
Prior to separation	PSC (SES)	Schedules a special payment through Treasury to ensure member receives final separation pay.
Day of separation	UNIT	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PSC (TVL) for liquidation purposes, and the standard separation letter.
Last Day	SPO	On the effective date of separation or date of departure on terminal leave, transmits the separation transaction.

Cancellation of Document Numbers and Accounting Data

Separation Document Number and Accounting Data issued to a member who wishes to remain in the service must be cancelled. In this event, the responsible SPO must send a Coast Guard message (not an E-mail) within 48 hours of discovering the need for cancellation to COMDT (CG-WRP-2) with PSC (SES), PSC (TVL), and the responsible Transportation Officer as information addressees, requesting cancellation of the Document ID. The **message** should contain the following information:

- Member's rate/rank, name, EMPLID and unit.
- Document Number and Accounting Data issued; date issued
- Member's scheduled separation date.
- Reason for cancellation request and member's resulting status (e.g. Reenlisted, Extended, Retained). If member is retained provide reason, estimated duration and subsequent status at the end of retention.
- SPO E-mail address.

NOTE: Members electing to remain in the service where actions to expend funds have been made (e. g. Shipment of household goods has occurred) shall be counseled on their liability and the applicable recoupment procedures. Such counseling shall be documented and acknowledged by the member's signature on their separation orders.

Exhibit 3-B-2

Preparation of Separation Orders

Introduction

After the Document Number and Accounting Data is in the Airport Terminal for CGPC approved separations, the responsible SPO shall issue Separation Orders on a Standard Travel Order for Military Personnel (CG-5131).

Special Instructions

Separation Orders shall include the following information:

Block	Entry
Station/ Place	Indicate the member's separation address or other location to which he/she is entitled to travel and transportation of HHG.
Nature of Duty	Enter "Discharge" or "RELAD" (as appropriate).
Item 10	Enter the following statement "You are directed to submit a Travel Claim to PSC (TVL) within 3 days after completion of the travel under these orders. If you decide to cancel these orders, you are personally liable for the repayment of any funds expended in accordance with these orders."

Statement required should separation be cancelled

If a member elects to remain on active duty after funds have been expended during separation processing, the following amendment to members separation orders shall be made:

"I acknowledge that I have voluntarily elected to remain on Active Duty after previously starting separation processing, and that I have been counseled concerning my liability to repay any funds expended during my separation processing and the applicable recoupment procedures."

MEMBER'S SIGNATURE

Exhibit 3-B-3

Enlisted to Cadet Status Processing

Introduction

The Academy SPO has the primary responsibility for ensuring a member's pay account in JUMPS is converted to cadet status when an enlisted member is being released from active duty to accept an appointment as a Cadet at the Coast Guard Academy.

The member's SPO has the responsibility to ensure that the member's PCS transfer is handled in a timely and accurate manner.

Procedures

When transferring an enlisted member to the Academy for appointment as a Cadet, the member's SPO shall:

- Prepare and transmit the Statement of Intent transaction and verify/enter mailing address information in Direct Access at least 45 days prior to the Cadet swearing-in date.
- Approve and endorse the member's PCS orders in Direct Access.
- The Academy SPO will input a Direct Access Discharge transaction to discharge the member from enlisted status, and submit an Accession transaction to enlist the member as a cadet.

Note: Advance Pay cannot be authorized (the member will be separated upon swearing-in as a cadet and would not be able to liquidate an advance).

Regular Retirement Separations

Introduction Retirements are usually processed as routine separations

Procedures Procedures required for a retirement.

When	Who Does It	What Happens
At least 60 days prior to: • The date the member goes on terminal leave: or, • The effective date of retirement, whichever is earlier	SPO	Prepares and transmits Statement of Intent (SOI). Verifies/enters mailing address information in Direct Access.
Note: If an SOI has processed in the system by the end-month compute for the month prior to the month of separation, the regular mid-month payment and the final pay, as well as allotments will be paid by JUMPS and the final pay projection will include any leave being sold.		
Prior to separation	SPO	Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214.
Note: The SPO will notify PSC (SES) if there is any change to the information submitted on the Statement of Intent (SOI). On routine separations, the amount of final pay will appear on the member's prior month LES.		
Day of separation	Unit	Delivers the DD-214, the final payment, (unless the member is on direct deposit) and the standard separation letter.
	SPO	On the effective date of terminal leave or retirement, transmits the retirement transaction.

Disability Retirement Separations

Introduction Temporary and permanent disability retirements are retirements that are approved under the physical disability evaluation system. They are processed as priority separations. The retirement date for members in this category will normally be 20 working days after the date CGPC's action. Active duty allotments will be paid by JUMPS for the last month of active duty.

Procedures Procedures required for Temporary and Permanent Disability Retirements.

Day	Who Does It	What Happens
0	CGPC (opm/epm)	Issues message directing temporary or permanent disability retirement.
1	SPO	• Sends urgent E-mail message to PSC (SES) with pertinent information using the format provided in Exhibit 3-B-1. • Ensures member has an updated mailing address in Direct Access or completes an update if member does not have access to Direct Access. **Note:** The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W-2. • Prepares the Orders transaction in Direct Access
2	PSC (SES)	Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and SRB recoupment endorsement on the reverse side of the DD-214 (if applicable). • Calculates the final pay due the member. • Schedules a special payment through Treasury to ensure the member receives final separation pay on his/her separation date.
13	SPO	If the PSC (SES) separation notification is not received at least 7 days prior to the date of separation, contacts PSC (SES). Nonreceipt of this E-mail message is an indication of a problem with the separation processing.
	Unit	On the effective date of retirement, delivers final pay, the DD-214, the standard separation letter to the member.
	SPO	On the effective date of terminal leave or retirement, transmits the Retirement (Endorsement on Orders) transaction.

Checklist for Separations

Introduction This checklist is provided to assist the unit/SPO in completing all necessary tasks required for separating members from active duty. It should be used along with the Checklist for RELAD, Checklist for Discharge, or Checklist for Retirement, as appropriate. This job aid is designed to be reproduced locally.

Separation checklist Action when separating a member.

Step	Action	Reference	Date
1	• Complete predischarge interview 6 months prior to separation date	PERSMAN, 12-B-4, ALCOAST 049/00,	
	• Transition Assistance Program counseling	COMDTINST 1900.2 (series)	
	Forward the following to the SPO: • Preseparation Counseling Checklist (DD-2648). **Note**: Upon receipt of the DD-2648, the SPO will prepare and transmit a Direct Access Training file update using School Code 500650	PPPM, Encl. (1)	
	• CG-3307 with SEP-4 entry completed.	PPPM, Encl. (6)	
2	Ensure member is physically qualified for separation.	PERSMAN, 12-B-6	
3	Complete an **E-Resume** at least six months prior to date of separation indicating member's intention to separate. For all members eligible for reenlistment: • Indicate in "career intentions" field of E-Resume**,** member's preferences in regards to a Selected Reserve Unit or Individual Ready Reserve (IRR). Also, include the member's address and phone number following separation.	PPPM, 5-D-13 Direct Access Online Guide, E-Resume	

Continued on next page

Separation checklist (continued)

Step	Action	Reference	Date
3 C O N T I N U E D	Upon receipt of the E-Resume, an ISC representative will contact the member to discuss assignment options and answer questions about participation in the reserve. If agreement is reached on an assignment to a billet in the selected reserve, the ISC will provide the member's servicing SPO with the information needed to effect the assignment. The **E-Resume** with assignment information will be used to complete reserve assignment orders to the new unit.		
4	Complete follow-up interview at 3 months prior to separation date.	PERSMAN, 12-B-4	
5	Complete PCS Departing/Separation Worksheet, PCS Entitlements Worksheet, and Career Intentions Worksheet, and forward to SPO with DD-2648 at least 60 days prior to the separation date.	PPPM, Encl (1) CG PSC-2000 CG PSC-2003 CG PSC-2045	
6	SPO forward DD-214 SW (worksheet).	DD-214 Instruction	
7	If the member is being discharged, and desires immediate enlistment in the Coast Guard Reserve the SPO will complete and forward an Enlistment Contract (DD-4/1), effective the day following discharge, to the unit for administration of the oath and signature.		

Continued on next page

Checklist for Separations, Continued

Separation checklist (continued)

Step	Action	Reference	Date
8	Ensure member schedules appointment with servicing transportation office to arrange shipment of household goods.	CGTRANSMAN, 1-H-1	
9	Conduct Final Termination Briefing IAW Personnel Security Manual.	PERSEC	
10	Counsel member on separation, • Complete CG-3307 entries; see Pg-7 Instruction (Encl. (6) of this manual) for sample entries. • Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account.	PERSMAN, 12-B-53	
11	Ensure Government Travel Charge Card is turned into coordinator for cancellation.	Charge Card Instruction	
12	Complete CG-3307 (SEP-19) entry for all enlisted members receiving Separation Pay and send a copy by fax to PSC (SES) at 785-339-3784.	**PPPM, Encl (6)**	
13	SPO completes **Direct Access** transactions.		
14	Complete appropriate separation letter(s) from enclosure (4) to this manual.	PPPM, 3-B-5, 7	
15	Counsel member on separation travel • Provide member with travel claim form(s) and instructions for completion.	CGS-JFTR	
16	Provide member with pre-addressed envelope to mail travel claims and original separation travel order to PSC (TVL).	PPPM, 2-B	
17	Review SPO/MED PDR's and complete CG-5507.	PERSMAN, 12-B-49	
18	Distribute PDR's.	PDR Instruction	

Checklist for RELAD

Introduction

This checklist provides a job aid to be used when a member is released from active duty (RELAD) and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for RELAD

Additional items when releasing a member from active duty.

Step	Action	Reference	Date
1	Complete Continued Health Care Coverage Benefit Program application.	CGCBP Instruction	
2	Complete ID Card(s).	Appendix (B) PPPM	
3	Counsel member on: • Assignment to Selected Reserve • Updating bank account information in Direct Access if the member will be assigned to a drilling status after separation.		
4	Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PSC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	PPPM, Encl (6)	
5	Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the SPO.	PPPM, 9-A-5	
6	Deliver separation paperwork to member.		

Checklist for Discharge

Introduction

This checklist provides a job aid to be used when a member is discharged, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for discharge

Additional items when discharging a member.

Step	Action	Reference	Date
1	Notify PSC (SES) (for Immediate or Priority discharges)	PPPM	
2	Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PSC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	PPPM, Encl (6)	
3	Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the SPO.	PPPM, 9-A-5	
4	Complete Continued Health Care Coverage Benefit Program application.		
5	Complete appropriate Discharge Certificate.	PERSMAN, 12-B-51	
6	Issue Honorable Discharge Button (if applicable).	PERSMAN, 12-B-52	
7	Refer to exhibit in PERSMAN for special information concerning discharges.	PERSMAN, 12-B-1	
8	If member will be enlisting in the Coast Guard Reserve immediately following discharge, complete an enlistment contract and return to servicing SPO		
9	Deliver separation paperwork to member.		

Checklist for Retirement

Introduction

This checklist provides a job aid to be used when a member retires, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for retirement

Additional items when retiring a member.

Step	Action	Date
1	Endorse retirement order • Forward one copy to the SPO.	
2	Ensure member contacts PSC (RAS) for retirement information. The following web site address provides "Information for Retirees." – http://www.uscg.mil/hq/PSC/RAS.htm	
3	Ensure the member completes and returns the form(s) from Enclosure (1) (CG PSC-4700, and if starting new allotments, CG PSC-7221) and includes a copy of their latest LES if they are continuing any allotments or direct deposit to same account. **Note**: CG PSC-4700 and CG PSC-7221 are available for online completion or downloading on PSC's website at http://www.uscg.mil/hq/PSC/ras. • Administratively review the form(s), ensuring they are completed in accordance with instructions.	

Continued on next page

Checklist for Retirement, Continued

Checklist for retirement (cont'd)

Step	Action	Date
4	If the member is married, • Use this table to determine what actions are necessary to comply with the spousal notification/concurrence requirements of the Survivor Benefit Plan (SBP) when a married member elects not to participate or to participate at less than the maximum level in SBP.	

If the Member and Spouse	And	Then
are co-located in the area of the member's duty station and are living together as husband and wife	the spouse concurs with the member's SBP election	the spouse and witness will complete and sign part VII of the CG PSC-4700
	the spouse does not concur with the member's SBP election	the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual
are not co-located or are not living together as husband and wife		the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual
are not living together as husband and wife	and the spouse's whereabouts are unknown and cannot be determined	the member will complete and sign the following statement "The whereabouts of my spouse are unknown to me and have been unknown to me for at least 90 days. I understand that if this statement is later found to be untrue that spouse coverage will be established on the full amount of retired pay with costs and interest collected retroactive to my date of retirement unless my spouse consents otherwise. I understand that any false statement or misrepresentation thereto is a violation of law punishable by fine of not more than $10,000 or imprisonment of not more than 5 years or both (18 U.S.C. 10001)".

Continued on next page

Checklist for retirement (cont'd)

Step	Action	Date
5	Forward the following to PSC (RAS) at least 30 days prior to retirement or start of terminal leave	
	• CG PSC-4700 (four pages)	
	• Copy of latest LES, if member is continuing any allotments or direct deposit to same account	
	• CG PSC-7221 if member is starting any new allotments	
	• SBP Spousal notification/concurrence letter, endorsed by spouse, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse does not complete part VII of the CG PSC-4700	
	• Statement signed by member, attesting that the whereabouts of spouse are unknown, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse cannot be located.	
6	Ensure retirement certificate and spouse's certificates are received from PSC (RAS) at least 30 days prior to member's retirement or departure on terminal leave. You may order Retirement Certificates at http://www.uscg.mil/hq/PSC/RAS.htm.	
7	Ensure member receives copy of the Thrift Saving Plan (TSP) Withdrawal Package if they have a TSP account. This includes TSP withdrawal forms, the booklet "Withdrawing Your TSP Account After Leaving Federal Service", and the notice "Important Tax Information About Payments From Your TSP Account."	
8	Complete retired and dependent ID cards.	

Reserve Retirement Separations

Introduction

Reserve retirements are processed by PSC (RAS). The two retirement categories are:

- Retirement with Pay (RET-1) for reservists who complete 20 years of satisfactory service and have reached age 60.
- Retirement Awaiting Pay at Age 60 (RET-2) for reservists who have satisfied all requirements for RET-1, except reaching age 60.

Procedures

Procedures for Retirement With Pay (RET-1)

When	Who does it	What happens
Six months prior to reaching age 60 if member has 20 years of satisfactory service	PSC (RAS)	Notify member in writing by sending an "Information Concerning Retirement With Pay (RET-1)" letter and information about the Reserve Component Survivor Benefit Plan.
After receipt of "Notification of Eligibility Letter" and retirement forms.	Member	Request transfer to RET-1 status by completing forms CG-HRISC-2055A and CG-PSC 4700 from Enclosure (1) to this manual. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time.
Note: 1. If the member is in a drilling status the retirement package will be sent to the member's home address one month prior to age sixty; if the member is not in a drilling status the retirement package will be sent approximately six months prior to the sixtieth birthday. 2. If it is determined that member is not eligible for RET-1 status, member will be separated (age waivers to attain eligibility may be requested from and granted by CGPC (rpm).		
1 month prior to retirement	PSC (RAS)	Forward to member: • Retirement Letter • Final Point Statement • Retirement Certificates (if applicable)
Retirement day	PSC (RAS)	Transmit Endorsement on Orders transaction
Note: Normally, reservists are voluntarily transferred to RET-2 status upon their request. There is one instance, however, where a reservist may be involuntarily transferred to RET-2 status. If an enlisted reservist has over 20 years satisfactory service, the reservist's enlistment expires, and the reservist fails to reenlist, the reservist may be involuntarily transferred to RET-2 status per Article 1.G.9.G, Coast Guard Personnel Manual. In such cases, the reservist's SPO shall notify ISC (pf) that the reservist has failed to reenlist. ISC (pf) shall in turn notify PSC (RAS). PSC (RAS) shall transmit Endorsement on Orders transactions to transfer the reservist to RET-2 status.		

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Procedures For RET-2 Status

Procedures for Retirement Awaiting Pay at Age 60 (RET-2) followed by Retirement With Pay (RET-1) upon reaching age 60.

Note: These steps apply only to those members who choose RET-2 status rather than continuing to drill.

When	Who Does It	What Happens
After completing 20 years of satisfactory service	PSC (RAS)	Sends "20 Year Letter" notifying member of eligibility for RET-2 Retirement. Include Reserve Component Survivor Benefit Plan election forms. (RCSBP is optional at this time)
After receipt of "20 year letter".	Member	May request transfer to RET-2 status by completing form CG-HRISC-2055A from Enclosure (1) to this manual. Written requests are submitted to ISC (pf) via the chain of command. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time.
Upon receipt of request for RET-2 Retirement	ISC (pf)	Forwards to PSC (RAS).
Upon receipt of request for RET-2 Retirement	PSC (RAS)	Forwards to member Retirement Information Package. **Note:** Members requesting RET-2 status who are not yet age 60 will receive retirement certificates at this time rather than at age 60 when transferred to RET-1 status.
RET-2 Retirement day	PSC (RAS)	Transmits Endorsement on Orders transactions to RET-2 status.

Section Overview

Introduction

This section will guide you through the procedures for reenlisting, extending, or retaining a member.

Continuous Pay

Members reenlisting or extending/re-extending an enlistment are not separated from JUMPS on the date of reenlistment or extension/re-extension. JUMPS recognizes this service as continuous and, if all documents are input timely, pay continues uninterrupted.

In this section

Topic	See Page
Reenlistment and Voluntary Extensions/Reextensions	3-C-2
Checklist for Reenlistment or Extension	3-C-3
Retention of Members in a Pay Status Other than Military Confinement	3-C-5
Retention of Members in a Non-Pay Status or in Military Confinement	3-C-6
Active Duty Extensions of Reservists and Recall of Retirees	3-C-7
Immediate Enlistment in Coast Guard Reserve Upon Discharge from the Regular Coast Guard	3-C-8
Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard	3-C-9

Reenlistments and Voluntary Extensions/Reextensions

Introduction This section will guide you through the process of continuing a member on active duty.

Reference

- PERSMAN, Chap 1
- Direct Access Online Manual
  - Begin Extension
  - Begin Re-extension
  - Agreement to Extend
  - Agreement to Re-extend
  - Reenlistment
  - Statement of Intent

Process This is the process for Reenlistments and voluntary Extensions or Reextensions.

When	Who Does It	What Happens
At least 45 days prior to effective date of reenlistment/extension /re-extension	SPO	Prepares and transmits a Statement of Intent (SOI) using Direct Access.
Notes: (1) If an Acceptance of Agreement to Extend/Reextend Enlistment transaction has processed in JUMPS then a Statement of Intent transaction is required to be submitted 45 days in advance only if the member is entitled to an SRB or if the member is selling leave. (2) Failure to submit this document in a timely manner may result in full stoppage of all pay, allowances and allotments.		
Effective date of reenlistment/extension /reextension	SPO	Ensures Reenlistment Contract (DD Form 4/1) or Agreement to Extend/Reextend is signed and then transmits the Direct Access transaction in the Contract Data module.
If applicable	PSC (MAS)	Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the SRB.
Note: The documents input by PSC (MAS) for credit of the SRB will not process in JUMPS until the reenlistment/extension/reextension document input by the SPO successfully processes.		

Checklist for Reenlistment or Extension

Introduction This checklist provides a job aid to be used when a unit/SPO is completing necessary tasks for reenlistments or extensions and should be used along with the Checklist for Separations in section B of this Chapter. It is designed to be reproduced locally.

Step	Action	Reference	Date
1	Ensure member meets eligibility requirements.	PERSMAN, 1-G	
2	Advise member: • May reenlist up to 3 months prior to normal expiration of enlistment (however, member can reenlist prior to 3 months if he/she meets the requirements for a SRB (refer to SRB Instruction) or is reenlisting for convenience of the government (refer to Chapter 1-G of the PERSMAN). • Reserve members may reenlist up to 90 days prior to normal expiration of enlistment. • Prorated loss of reenlistment bonus for the period of early reenlistment/extension. • The saved leave balance and regular leave balance on the effective date of separation. • The number of days of leave previously sold during career.	PERSMAN, 1-G ALCOAST 317/04	
3	• Counsel member on SRB program.	SRB Instruction	
4	• Ensure CG-3307 entry is completed for citizens of the Republic of the Philippines (see Pg-7 Instruction for sample entry).	PERSMAN, 12-B-47 PPPM, Encl (6)	
5	• Ensure member completes Career Intentions Worksheet and forwards to SPO.	PPPM	
6	• SPO forwards appropriate documentation to unit for member's signature.	PPPM	
7	• Unit returns signed documentation to SPO for input into Direct Access.	PPPM	
8	• If member intended to discharge and decides to reenlist/extend, ensure member submits new Allotment Worksheet (if allotments stop).	PPPM	
9	• Explain Article 137, UCMJ and code of Conduct, Complete Page 7 (CG-3307) entry.	PERSMAN, 8-A-1 ALCOAST 049/00	

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Checklist for Reenlistment or Extension, Continued

SRB processing

Process table for Selective Reenlistment Bonuses.

WHEN	THEN
retention documents submitted by the SPO have successfully processed in JUMPS,	initial 50% SRB installment will be made within two pay periods.
lump sum payment is approved by CGPC (epm)	lump sum SRB payments will be processed by PSC within 30 days after receipt and included in the member's first regular payment following successful processing of the reenlistment/extension transaction.

Rules for payment of lump sum leave upon reenlistment or first extension of enlistment

These are the basic rules (per Art. 7-A-20, PERSMAN) for selling leave upon reenlistment or entering the first extension an enlistment.

- Members reenlisting within 90 days of their normal expiration of enlistment date, or extending their current enlistments for the first time, may receive payment for lump sum leave, not to exceed a career total of 60 days leave.
- Members reenlisting more than 90 days prior to their normal expiration enlistment date or reextending their current enlistments MAY NOT receive payment for lump sum leave.

Payment for lump sum leave will be included in the first end month payment following successful processing of the reenlistment/or begin service under first extension transaction.

Procedures for members with more than 90 days remaining on first enlistment

Members who desire to sell leave, but are not within 90 days of their normal expiration of enlistment, should enter into an agreement to extend their enlistment to meet the obligated service requirement.

- These members will be eligible to sell leave when their first extension of enlistment becomes effective.

Retention of Members in a Pay Status Other than Military Confinement

Introduction

This includes members retained for reasons of Home Awaiting Orders Status (HOAS), cutter at sea, national emergency, failure to pass separation physical, etc., when stoppage of pay, allowances, and allotments should not occur.

Reference

- PERSMAN, Chap 12-B-11
- PPPM, Chap 3-C
- PAYMAN, Chap 2-L
- Direct Access Online Manual, Contract Data

Procedures

Procedures required by the SPO for retention of members in a pay status other than Military confinement.

When	Action
Prior to retention	Review PERSMAN to determine length of time the enlistment is to be extended.
At least 45 days prior to effective date of retention	Prepare and transmit a Statement of Intent transaction to JUMPS.
Notes: (1) In cases of short notice (between 10 and 44 days prior to the retention date) the SPO is required to submit a Statement of Intent (SOI) transaction. (2) In cases less than 10 days prior to retention effective date, the SPO shall notify PSC (SES) in addition to preparing and transmitting an SOI.	
Effective date of retention	Prepare and transmit a new Contract in Direct Access to reflect the new EOE.

Retention of Members in a Non-Pay Status or in Military Confinement

Introduction

This includes member involuntarily retained because of military confinement, appellate leave, or any other non-pay status.

Reference

- PERSMAN, Chap 12-B-11
- PPPM, Chap 3-C
- PAYMAN, Chap 2-L
- Direct Access Online Manual, Contract Data

Procedures

Procedures required by the SPO for retention of members in a non-pay status or in Military confinement.

When	Action
Prior to retention	Review reference to determine length of time the enlistment is to be extended.
Note: Do not prepare a Statement of Intent transaction.	
Effective date of retention	Prepare and transmit new Contract in Direct Access to reflect the new EOE.

Active Duty Extensions of Reservists and Recall of Retirees

Introduction

This includes: Reservists on active duty being paid by JUMPS whose active duty period is extended; regular members retiring and immediately being recalled to active duty, and members currently in a recall from retirement status whose active duty is being extended.

Procedures

Follow these procedures for all cases of active duty extensions of Reservists and recall of retirees.

- For reservist active duty extensions, the Reserve Orders will be modified and approved.
- For recalled retiree active duty extensions, the assignment officer will create orders and those orders will automatically generate the appropriate Reserve Orders Direct Access transaction (P192), without any action required by the SPO.

When	Who Does It	What Happens
At least 45 days prior to effective date	SPO	Prepares and transmits a Statement of Intent transaction.
30 days prior to effective date	SPO	Modify and approve the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date.
Notes: (1) In cases of insufficient lead time (less than 10 days), the SPO shall notify PSC (SES) via E-mail and provide all relevant information that would have been provided on the Statement of Intent. (2) If the member's active duty is being extended via an amendment to the member's original orders and the Orders Order End Date has been modified and transmitted in Direct Access to reflect the new active duty termination date 45 days or more prior to the member's expected active duty termination date, then an SOI is not required.		

Immediate Enlistment in Coast Guard Reserve upon Discharge from the Regular Coast Guard

Introduction

Members in the regular Coast Guard being discharged may immediately enlist in the Coast Guard Reserve if they meet eligibility requirements.

Reference

PERSMAN, Chap 1-G

Definition

The term "Immediate Enlistment" means within 24 hours following separation from the regular Coast Guard.

Procedures

The ISC (fot) where the member will reside following separation from the regular Coast Guard must approve the member's E-Resume before the member may enlist in the Coast Guard Reserve.

- Detailed instructions for completing and processing the E-Resume can be found at http://cgweb.uscg.mil/g-w/psc/Direct-Access/eresume/overview.htm. The process is summarized on the Checklist for Separations in section 3-B of this manual.

- If approved for enlistment in the Coast Guard Reserve the member shall be processed for discharge from the regular Coast Guard using the Routine Separation Procedures listed in Section 3-B of this manual, and rehired into the Coast Guard Reserve by the SPO servicing the member at the time of separation.

Enlistment in Coast Guard Reserve after 24 hours

Enlistment in the Coast Guard Reserve after 24 hours following discharge from the regular Coast Guard must be processed at a Coast Guard recruiting office.

Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard

Introduction

Coast Guard Reserve members serving on extended active duty of 12 months or more may be authorized to enlist in the regular Coast Guard if they meet eligibility requirements.

Reference

PERSMAN, Chap 1-G

Procedures

The member shall be processed for discharge from the Coast Guard Reserve and for enlistment in the regular Coast Guard by the regular SPO handling the member's records, using the following procedures:

When	Who Does It	What Happens
In time to allow approval prior to date of reenlistment	Member	Submits letter request for reenlistment to Commander (CGPC-EPM) via chain of command as prescribed in the reference.
At least 45 days prior to effective date of separation or departure on terminal leave.	SPO	Prepares and transmits a Statement of Intent (SOI) transaction to JUMPS.
Day of discharge	Unit	Delivers DD form 214 to member.
	SPO	Transmits a Discharge Separation transaction.
Day following discharge If applicable	SPO PSC (MAS)	Transmits a Rehire transaction. Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the Selective Reenlistment Bonus.

Reservist on extended active duty

Coast Guard Reserve members who desire to enlist in the regular Coast Guard, and who are NOT currently on extended active duty of 12 months or more, must be processed at a Coast Guard recruiting office.

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Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for processing enlisted advancements and CWO appointments, recording educational accomplishments, and adding or deleting qualification codes. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Enlisted Advancements	4-A-1
B	Warrant Officer Appointments	4-B-1
C	Education and Qualifications	4-C-1

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Section Overview

Introduction

This section will guide you through the procedures for advancing a member.

In this section

Topic	See Page
Headquarters Advancement Checklist	4-A-2
Commanding Officer Advancement Process	4-A-3
Commanding Officer Advancement Checklist	4-A-4

Headquarters Advancement Checklist

Introduction

Following each servicewide exam PSC (ADV) and CGPC (epm) will publish eligibility lists and a series of Enlisted Personnel Advancement Authorizations (EPAA), for active duty personnel, or Headquarters Reserve Advancement Authorizations (HRAA) for reservists. An EPAA or HRAA is notification of who will be advanced and on what date the advancement will be effective.

Checklist

Use the following checklist when a member is authorized by an EPAA or HRAA to be advanced.

Step	Action	Reference	Date
1	Ensure member meets weight standards	Weight Instruction	
2	• Complete Petty Officer Advancement Certificate for advancement to E-4 through E-6. • Certificate for E-7 through E-9 will be completed by PSC (ADV)	PERSMAN, 5-C-35	
3	• Issue new ID card DD-2CG	PPPM	
4	• Remove member from “A” school list • (members in pay grade E-3 only)	PERSMAN, 5-C-29	
5	• Complete performance evaluations • (if applicable)	PERSMAN, 10-B-5	
6	• Ensure member has sufficient obligated service for advancement to E-7, E-8, or E-9 and complete appropriate CG-3307. • **Note:** A person authorized advancement who cannot meet the obligated service requirement due to high year tenure will be advanced as long as they obligate to their professional growth point.	**PERSMAN, 5-C-25** **PPPM, Encl (6), A&R2**	

Commanding Officer Advancement Process

Introduction

The advancement process is broken down into stages by what needs to be completed and who is responsible.

Advancement process

This table identifies the process for advancement to E-3 and designated class A school graduate's advancement to E-4.

Stage	Who does it	What Happens
1	Member	Completes EOCT and Performance Qualifications. Submits Career Development Worksheet (encl. (1) to this manual).
2	CO of Unit	Ensures member is eligible, approves request and forwards Career Development Worksheet to the SPO with special evaluations, if needed.
3	SPO	Completes advancement transactions.

Commanding Officer Advancement Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/SPO in completing all necessary tasks required for advancing a member. This job aid is designed to be reproduced locally.

Usage

The Commanding Officer Advancement Checklist can be used to complete the necessary transactions on a member for:

- Advancement.
- Adding a designator.
- Removing a designator.
- Change in rating.
- Reduction in rate (use the Disciplinary Actions page for reductions awarded as the result of CO's NJP or Courts-Martial).

This checklist not be used for:

- Members who are being advanced by the EPAA or HRAA.

Advancement checklist

Action when the CO authorizes a member to be advanced.

Step	Action	Reference	Date
1	Unit ensure member is eligible for advancement and advancement is not retroactive	PERSMAN, 5-C-3 and 5-C-28	
2	Complete Career Development Worksheet, CG PSC-2030	PPPM, Encl. (1)	
3	SPO completes Direct Access transactions Develop Workforce > Career Management > Use > Adv/Promote One Member	Direct Access Online Manual, Advancements	
4	Unit complete CG-5530 or DD Form 216 CG	PERSMAN, 5-C-35	
5	Issue ID cards (if applicable)	PPPM	
6	Complete advancement evaluation when applicable	PERSMAN, 10-B-2	

Section Overview

Introduction

This section will guide you through the warrant officer appointment process

In this section

Topic	See Page
Warrant Officer Appointment Process	4-B-2
Warrant Officer Appointment Checklist	4-B-3
Warrant Officer Appointment Process (Reserve)	4-B-4
Warrant Officer Appointment Checklist (Reserve)	4-B-5

Warrant Officer Appointment Process

Introduction

The Coast Guard Personnel Command CGPC (opm-1) is the owner of the CWO Appointment Board Process. In November of each year CGPC will release an ALCGPERSCOM announcing the timeline for the next CWO Appointment Board. This message will establish responsibilities and cutoff dates.

Reference

(a) PERSMAN, 1-D

Process

Here is the warrant officer appointment process.

Stage	Who Does It	What Happens
1	Member	Meets all eligibility requirements by 1 January
2	Member	Prior to published cutoff date: • Submits request to CO to obtain recommendation • Once recommendation obtained submits E-resume in Direct Access
3	CO of Unit	Completes E-interview in Direct Access to enter member in process
4	Direct Access	Produces PDE for member's validation.
5	Direct Access	Produces Profile Letter
6	CGPC (opm-1)	Publishes pre-board eligibility list via ALCGPERSCOM
7	Member	Submits Resume if listed as a primary or alternate candidate
8	CO of Unit	Submits OER and an initial endorsement to member's resume prior to established cutoff date.
9	CGPC (opm-1)	Convenes selection board Publishes selection list

Warrant Officer Appointment Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/SPO in completing all necessary tasks required when a member is selected for promotion to warrant officer. This job aid to designed to be reproduced locally.

Reference

(a) PERSMAN, 1-D

Procedures

Procedures required upon selection to warrant officer

Step	Action	Reference	Date
1	Ensure physically qualified for appointment (within 12 months of appointment).	1-D-11 PERSMAN	
2	Review SRB entitlement	SRB Instruction	
3	Endorse Appoint letter		
4	Ensure weight requirements are met	Weight Instruction	
5	Execute Oath of Office, CG-9556	1-D-11 PERSMAN	
6	Complete ID card(s)	PPPM	
7	Appointee mails copy of Oath of Office and Physical to CGPC (opm-1)	1-D PERSMAN	

Warrant Officer Appointment Process (Reserve)

Introduction

The warrant officer appointment process for reserve members is broken down into stages by what needs to be completed and who is responsible.

Reference

(a) RPM, 7-B

Process

Process table for selection to warrant officer

Stage	Who Does It	What Happens
1	Member	Meets all eligibility requirements under 7-B-1, RPM
2	Member	Prior to 1 December: • Updates BI or NAC (if required) • Submits request • Completes required ADT
3	CO of Unit	Sends SPO, via letter, names of recommended candidates NLT 1 Jan
4	SPO	Enters CO's recommendation into PMIS NLT last update in Jan. **Note**: The SPO must reenter the CO's recommendation and CWO exam specialty for each cycle (annually) that the member is recommended to participate.
5	PSC	Produces PDE for member's review
6	PSC	Develops pre-board total scores
7	COMDT	Publishes list of candidates and alternates eligible for consideration via ALDIST in Feb/Mar
8	CO of Unit	Submit WO recommendation files on candidates directly to district (a) NLT 1 May
9	District	Submits recommendation files to arrive COMDT (G-WTR) NLT 15 Jun
10	COMDT	• Convenes selection board in Aug • Publishes selection list Aug/Sep

Warrant Officer Appointment Checklist (Reserve)

Introduction

This checklist has been provided as a job aid to assist the unit/SPO in completing all necessary tasks required when a reserve member is selected for promotion to warrant officer. This job aid is designed to be reproduced locally.

Reference

(a) RPM, 7-B

Procedures

Procedures required upon selection to warrant officer

Step	Action	Reference	Completed
1	Ensure physically qualified for appointment.	RPM, 7-B-1	
2	Ensure weight requirements are met.	Weight Instruction	
3	Endorse appointment letter.		
4	Execute Oath of Office, CG-9556	CG-9556	
5	Complete Officer Uniform Allowance Claim, PSC-5100	PPPM, Encl. (1)	
6	Complete ID Card(s)	PPPM	

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Section Overview

Introduction

This section will guide you through the process and procedures to report completion of formal training courses, educational accomplishments, and qualification changes.

In this section

Topic	See Page
Training and Educational Accomplishments	4-C-2
Individual's Record of Small Arms Training	4-C-4
Veteran's Educational Assistance Program (VEAP)	4-C-5
Procedures to Enroll in MGIB for Certain VEAP Participants	4-C-7
Managing Competencies (Qualification Codes)	4-C-11
Insignia	4-C-12

Training and Educational Accomplishments

Introduction

Completion of formal training courses and other educational accomplishments must be recorded in the Direct Access system.

References

(a) Training and Education Manual, Chap 4
(b) RPM, 8.C.9
(c) Direct Access Online Manual, Training, Education, and Test Results.

Formal Training Courses

This is the process of reporting completion of a formal training course such as Civil Rights/Human Relations Awareness Training.

Stage	Who Does It	What Happens
1	Member	Completes a Career Development Worksheet (CG PSC-2030) **Note:** If more than one member of the unit attended the same course, at the same time, the unit may submit a list of attendees in lieu of individual worksheets.
2	Unit	Forwards worksheet or list of attendees to SPO or
3	SPO/Unit	Completes appropriate Direct Access transaction. Home > Develop Workforce > Manage Competencies (GBL) > Use > Training

Retest of enlisted battery tests

This is the process for reporting a retest of an enlisted battery test.

Stage	Who Does It	What Happens
1	Unit	• Provides a copy to the member • Forwards a letter documenting a retest to SPO or
2	SPO/Unit	Completes appropriate Direct Access transaction. Home > Develop Workforce > Recruit Workforce> Use > Test Results

Continued on next page

Training and Educational Accomplishments, Continued

Change in language competency

This is the process for reporting a change in language competency.

Stage	Who Does It	What Happens
1	Member	Provides documentation to unit admin office
2	Unit	Forwards letter documenting change to SPO; or
3	SPO/Unit	Completes appropriate Direct Access transaction. Home > Develop Workforce > Manage Competencies (GBL) > Use > Education

Reporting educational accomplishments for reservists

This is the process for reservists reporting completion of a college degree, change in educational level or completion of other than CG Institute correspondence courses.

Stage	Who Does It	What Happens
1	Member	Provides documentation to unit admin office
2	Unit	Forwards copy of documentation to the SPO or
3	SPO/Unit	Completes appropriate Direct Access transaction. Home > Develop Workforce > Manage Competencies (GBL) > Use > Education

Off duty educational accomplishments

This is the process for reporting completion of an off duty course of study such as completing a GED or earning a college degree.

Stage	Who Does It	What Happens
1	Member	Provides documentation to ESO
2	Unit/ESO	Forwards copy of documentation to the SPO or
3	SPO/Unit	Completes appropriate Direct Access transaction. Home > Develop Workforce > Manage Competencies (GBL) > Use > Education

Record Of Professional Development

In addition to the methods listed above for entering training and education data in Direct Access, form CG-4082, Record Of Professional Development (RPD) may be used to report accomplishments. This form offers active duty, reserve and civilian personnel the opportunity to record their professional development accomplishment to CGPC-ADM-3 where it will become a part of their official record. The procedure is voluntary and does not affect Direct Access entry.

Individual's Record of Small Arms Training

Introduction

The Individual's Record of Small Arms Training (CG-3029A) provides a chronological summary of an individual's small arms qualifications and awards. Prepare this form when the member participates in small arms training.

Preparation

The instructions for completion of the CG-3029A are on the reverse side of the form. Upon completion, file the original in the unit PDR, (if maintained) otherwise in the training record, and forward a copy to the SPO.

Types of awards

Members who qualify with a pistol or rifle will receive a Marksman (M), Sharpshooter (S), or Expert (E) award according to the qualifying score.

Award breakdown

Use the qualification and breakdown of scores when completing CG-3029A.

Course	Scored	Qualified as
BPMC	144 - 150 129 - 143 114 - 128 000 - 113	Expert Sharpshooter Marksman Unqualified
M16	175 - 200 167 - 174 140 - 166 000 - 139	Expert Sharpshooter Marksman Unqualified
PRSC	**144 and above**	**Qualified**
PPC	**45 and above**	**Qualified**
JPC	009 and above	Qualified

Veteran's Educational Assistance Program (VEAP)

Introduction

The Veteran's Education Assistance Program (VEAP) was available to any member who first became a member between 1 January 1977 and 30 June 1985. Participating members must have an "E" type allotment. Below are instructions for processing a lump sum payment and a refund of VEAP funds.

Reference

(a) Training & Educational Manual, 3-D-3
(b) PAYMAN, 7-D

Process lump sum payment of VEAP

Process table for lump sum payment.

Stage	Who Does It	What Happens
1	Member	Contacts SPO
2	SPO	Determines if amount being deposited is a valid amount
3	Member	• Prepares a check or money order payable to "U.S. Coast Guard" with the following information: Member's name SSN Total amount of lump sum and period covered by lump sum • Mails payment to: **ATTN: COLLECTION CLERK** **COMMANDING OFFICER (MAS)** **USCG PERSONNEL SERVICE CENTER** **444 SE QUINCY STREET** **TOPEKA KS 66683-3591**

Continued on next page

Veteran's Educational Assistance Program (VEAP), Continued

Procedure for VEAP refund

Use this procedure to request a VEAP refund.

Step	Action
1	Complete application for Refund of Educational Contributions (VA Form 4-5281) items 1-10 must be completed
2	Mail application to: ATTN: VOUCHER SECTION COMMANDING OFFICER (MAS) USCG PERSONNEL SERVICE CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591
3	Member should receive refund within 90 days

Procedures to Enroll in MGIB for Certain VEAP Participants

Introduction

The President signed into law the Veterans' Benefits Improvements Act of 1996 (Public Law 104-275) on 9 October 1996. It contains provisions for certain VEAP participants who were on active duty on 9 October 1996 to either enroll in MGIB or remain in VEAP.

- Effective 1 October, 2004 MGIB benefits total **$36,144.00, paid at $1004.00** per month for 36 months for full-time schooling.
- VEAP Benefits total $8,100 at $300 (max.) per month for 27 months for full-time schooling.

Eligible Members

For the purposes of this policy, the Department of Veterans' Affairs defines "VEAP participants" as…

"Only those service members who had VEAP contributions in their VEAP accounts on 9 October 96."

Active duty members who restarted a VEAP allotment, or signed a request to restart one prior to 9 October 1996, are eligible to enroll in MGIB.

Non-Eligible Members

Service members who did not participate in VEAP or participated but withdrew all their money from their VEAP accounts and did not re-deposit money prior to 9 October 1996 are not eligible to enroll in MGIB.

- They cannot reestablish eligibility for enrollment in the MGIB.
- Members who participated, but withdrew all the money from their VEAP may reestablish their eligibility for VEAP benefits by re-depositing money in VEAP.

Continued on next page

Procedures to Enroll in MGIB for Certain VEAP Participants,
Continued

Eligible VEAP Participants must choose to enroll in MGIB or remain in VEAP by 8 Oct. 97

Eligible VEAP participants (those who had money in their VEAP accounts on 9 October 1996) must elect to either participate or not to participate in the MGIB by 8 October 1997.

- The decision to enroll or not to participate in MGIB is irrevocable.
- Members electing to participate will agree to have their pay reduced $100 a month for 12 months, or they can elect to contribute the $1200 in a lump sum.
- Members separating from active duty before completing the $1200 pay reduction will be required to pay the remaining amount in a lump sum before separation.
- Members electing to participate also must apply for a refund of all remaining contributions in their VEAP accounts to the Department of Veteran's Affairs via (PSC) using either VA form 5281 or VA form 4-5281.

Process

This is the process for eligible VEAP participants to either enroll in MGIB or indicate their decision not to enroll.

Stage	Who Does It	What Happens
1	PSC	Provides the following to unit COs and OICs by 25 JAN 97: • List of members attached who are eligible to enroll • Copies of DD Form 2366 • VA Forms for VEAP refunds (VA Form 5281 or 4-5281)
2	CO/OIC	Ensures that by 8 OCT 97 each eligible member • Signs the list indicating their election to participate or not to participate • Completes and signs a DD form 2366 (instructions for form completion and distribution can be found further in this section)
		For members choosing to enroll in MGIB: • Ensure they complete and sign VA Form 5281 or VA Form 4-5281 for a refund of their VEAP contributions.
		Sends signed list to COMDT (G-WPM-1) ATTN: MGIB Distributes completed forms (DD-2366, VA-5281/4-5281) in accordance with the procedures further in this section

Continued on next page

Procedures to Enroll in MGIB for Certain VEAP Participants, Continued

Process (cont'd)

Stage	Who Does It	What Happens
3	PSC	• Process pay reduction or lump sum payment including, if applicable, VEAP allotment stops, for personnel electing to participate in the program • Forwards VA Form 5281/4-5281 to the VA for the refund of VEAP contributions for personnel electing to participate • Transfers MGIB pay reductions to the Treasury department • Transfers MGIB eligibility data to the Defense Manpower Data Center • Provides monthly report to COMDT (G-WPM-1)

Procedures for members electing to enroll in MGIB

Members electing to enroll in MGIB shall

Step	Action	
1	Sign list provided by PSC indicating their election to participate	
2	Complete and sign a DD Form 2366 with the following entry in the "Service Unique Education Assistance Options" Block: *"I am enrolling in the MGIB based on my active participation in VEAP as provided for in Public law 104-275. I also understand that I must request a refund of any remaining contributions in my VEAP account."*	
3	Complete and sign either a VA Form 5281 or a VA Form 4-5281 for the required refund of VEAP contributions.	
4	Choose a payment option	
	Option	**Action**
	Monthly payroll deduction	Complete an Allotment Worksheet (CG PSC-2040, from encl. (1) to this manual) indicate a type "F" MGIB allotment
	Lump Sum Payment	Make out a check or money order payable to: "U. S. Coast Guard" • Ensure the check or money order includes the member's name and SSN

Continued on next page

Procedures to Enroll in MGIB for Certain VEAP Participants, Continued

Procedures for members electing to remain in VEAP

Eligible members electing not to participate in MGIB and to remain in VEAP shall:

Step	Action
1	Sign list provided by PSC indicating their election not to participate
2	Complete and sign a DD Form 2366 with the following entry in the "Service Unique Education Assistance Options" Block: *"I elect to remain in VEAP. I Do not desire to participate in the MGIB as provided for in Public law 104-275. I understand my election not to participate is irrevocable."*

Distribution of elections

Distribute completed elections as follows:

Form	Distribution
DD-2366	Original -- COMDT (WPM-1) ATTN: MGIB Copy -- Servicing SPO Copy* -- PSC (MAS) Copy -- Unit PDR Copy -- Member
VA-5281 or VA-4-5281	Original -- PSC (MAS) * -- Unit PDR Copy -- Member Copy
CG PSC-2040 Or lump sum payment	Original -- PSC (MAS) * -- Member Copy

***Note**: For members electing to enroll in MGIB, ensure the DD-2366, VEAP Refund request, and Allotment Authorization or lump sum payment are all securely stapled together and mailed to PSC (MAS) at the same time.

More information

If you need more information about MGIB eligibility, benefits, or the enrollment process, please contact

- Unit Educational Services Officer (ESO)
- COMDT (G-WPM-1) at 202-267-1636
- Department of Veterans' Affairs' at 1-800-827-1000

Managing Competencies (Qualification Codes)

Introduction

Competencies are used as a means of recording a member's accomplishments while in service. This section helps you determine when to add or delete competencies.

Reference

(a) Qual Code Man, Chap. 2, Enlisted Qualification Code Assignment

Adding a competency

Add a competency for a member.

WHEN	THEN
a member completes a school on orders issued by TQC and receives a competency	Direct Access automatically updates the member's record to reflect the additional competency
a member completes school on orders issued by other than TQC and receives a competency	forward Career Development Worksheet (CG PSC-2030) to the SPO.
a member is assigned a competency (qualification code) by the unit CO	the CO will forward a letter or a worksheet to the SPO and provide a copy to the member.
a member completes small arms training and receives a competency	forward Career Development Worksheet (CG PSC-2030) to the SPO.

Insignia

Introduction

When a member becomes qualified to permanently wear an insignia, such as that for Company Commander or Marine Safety, this competency must be entered into Direct Access.

Reporting this competency

When a member becomes qualified to permanently wear an insignia, the following must occur:

Stage	Who does it	Action to be taken
1	UNIT	• Prepare a designation letter to the member; • Copy of the designation letter will be sent to the SPO; **or**
2	UNIT/SPO	• Will record this honor or award in Direct Access using appropriate honor or award code.

Chapter Overview

Introduction

The objective of this chapter is to provide concise, user friendly job aids for entering and updating general personnel data, such as information on dependency, insurance, identification cards, and other miscellaneous items not covered in other sections of this manual.

In this chapter

Section	Description	See Page
A	Decedent Affairs	5-A-1
B	Dependent Affairs	5-B-1
C	Maintenance of Personnel Information	5-C-1
D	Miscellaneous	5-D-1

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Section Overview

Introduction

This section will guide you through the process of electing, increasing, reducing, declining, or canceling SGLI coverage and reporting casualties.

In this section

Topic	See Page
Designation of Beneficiaries and Emergency Data	5-A-2
Servicemembers' Group Life Insurance (SGLI)	5-A-4
SGLI Family Coverage	5-A-11
Casualty Reporting	5-A-15

Designation of Beneficiaries and Emergency Contact

Introduction

To designate beneficiaries, complete a Designation of Beneficiaries form (CG PSC-2020D) and submit to the SPO. The CG PSC-2020D is not used to designate Servicemembers' Group Life Insurance (SGLI) beneficiaries. Changes to a member's Emergency Contact Information ideally will be made by the member in Direct Access or by the SPO at the member's request.

Reference

(a) PSCINST 5000 (BAH, Dependency and Emergency Data Forms and Reports)
(b) Designation of Beneficiaries form (CG PSC-2020D)
(c) PAYMAN, Chap 10-K, Death Gratuity

Purpose

The Designation of Beneficiaries form and the computer generated Emergency Contact Report are official documents required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
- Name of person(s) receiving death gratuities
- Person(s) who receive allotment of pay if missing or unable to transmit funds
- Person(s) who receive unpaid pay and allowances
- Person(s) to notify in case of emergency or death
- Person(s) who receive unpaid pay and allowances

Annual Verification

Annually, during the month of November, members must verify their Designation of Beneficiaries form (CG PSC-2020D) and computer generated Emergency Contact Information. Refer to Section 5-C of this manual for procedures on the annual verification.

Continued on next page

Designation of Beneficiaries and Emergency Contact, Continued

When to submit the CG PSC-2020D

The Designation of Beneficiaries (CG PSC-2020D) will be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Changes to the form occurring in any item

When to submit or update the Emergency Contact Information

The Emergency Contact Information will be submitted and/or updated by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Changes to the information occurring in any item

Servicemembers' Group Life Insurance (SGLI)

Introduction

Servicemembers' Group Life Insurance was established for the purpose of making life insurance protection available to members of the Uniformed Services at a reasonable cost. This information will assist the member when electing, increasing, reducing, declining or canceling coverage.

Reference

(a) VA Handbook H-29-98-1 (Revised April 2004), Servicemembers' and Veterans' Group Life Insurance Handbook
(b) http://www.insurance.va.gov/sgliSite/default.htm (CG SGLI Homepage)
(c) http://www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/SGLI.htm (CG Military Personnel's SGLI homepage)

Automatic coverage

SGLI automatically insures all newly accessed members for $250,000 and then allows them to either:

- Decline SGLI coverage , or
- Elect a reduced level of SGLI coverage, in multiples of $10,000.

Note: SGLI coverage continues (at no cost to the member) for a period of 120 days following separation or release from active duty, unless the member becomes a drilling reservist upon release from active duty.

Coverage for reserve members

The following reserves have full-time coverage under SGLI (unless the reservist declines coverage in writing):

- Reservists on active duty or active duty for training.
- Reservists on inactive duty training.
- Reservists assigned to the selected reserve that are assigned to a unit or position in which the reservist may be required to perform active duty, or active duty for training, and each year will be scheduled to perform at least twelve periods of inactive duty training that is creditable for retirement purposes.

The following reserve members do not have coverage under SGLI, but may elect coverage under Veterans' Group Life Insurance (VGLI):

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

Coverage for reserve members (cont'd)

- Reservists in the individual ready reserve (IRR).
- Reservists in the retired reserve (RET-1, RET-2, or RET-3 status).
- Reservists who were covered by SGLI who separate from active duty, active duty for training, or the selected reserve.

Requests for coverage under VGLI must be made within 120 days of entry into one of the above three statuses, and enrollment must be effected through the Office of Servicemembers' Group Life Insurance. Contact:

OSGLI
PO Box 5000
Millville, New Jersey 08332-9928
Phone: 1-800-419-1473

Payment of SGLI Premium

Active duty members and reservists eligible to receive drill pay will make SGLI payments through automatic payroll deductions which will be reflected on the member's LES.

Note: Reservists enrolled in SGLI who do not drill temporarily, but remain in a good pay status, will accrue a negative SGLI premium. Upon resumption of a drilling status, the system will deduct the negative premium balance from the member's pay. If the member does not drill for pay within five months and no SGLI payments is made SGLI coverage will be administratively terminated. To avoid cancellation of SGLI Coverage, reservists with a negative balance may pay off that balance with a check or money order or credit card (Visa or Master Card).

For payment by credit card (Visa or Master Card) or call PSC (MAS/DC) at (785) 339-3610.

Check or money order payments should:

- Be made payable to "U.S. Coast Guard,"
- Be clearly marked "SGLI PAYMENT,"
- Include member's name and EMPLID

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

Payment of SGLI Premium (cont'd)

Sent Check/MO Payments to: COMMANDING OFFICER (MAS)
USCG PERSONNEL SERVICE CENTER
ATTN: SGLI
444 SE QUINCY STREET
TOPEKA KS 66683-3591

Procedures for electing coverage or increased coverage previously declined or decreased

If a member had previously cancelled or reduced their SGLI coverage and now wants to start or increase their SGLI coverage, the member must make a written request. Use Request for Insurance (SGLV-8285), in accordance with instructions contained on the back of the form.

The form SGLV-8285 should be completed and signed by the member in the presence of an authorized representative of his/her command, who should then complete the certification below the member's signature.

Use the following table to determine if approval by the Office of Servicemembers' Group Life Insurance (OSGLI) is required before coverage can be increased or restored:

If	Then
Member answers "NO" to item 11, and all parts of items 12 and 13	Member meets the "proof of good health" requirement. SGLI is increased or restored effective the date the USCG receives the form. The original and photocopies of the completed form are distributed as follows: Original - CGPC (adm-3) Photocopy 1 - SPO Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)
Member answers "YES" to item 11 or any part of item 12 or 13	The original SGLV-8285 is filed in the member's personnel file and a copy of the completed form is sent to the OSGLI for review and approval. SGLI may not be increased or restored until approval has been received from OSGLI.
Approval has been obtained by OSGLI on the member	The copy returned from OSGLI is filed with the original SGLV-8286 at CGPC (adm-3). Photocopies of the "Approval" are distributed as follows: Photocopy 1 - SPO Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

Procedures for reducing or declining coverage

A member who desires to reduce or decline SGLI coverage must complete a Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286). Reduction or cancellation will be effective at midnight of the last day of the month in which a Direct Access SGLI transaction is processed by PSC.

Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286)

Members with SGLI coverage must complete the Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286) whenever they make a beneficiary designation or changes a previous designation. The Service members' and Veterans' Group Life Insurance Handbook (VA Handbook 29-98-1) should be available for the member to read when completing this form. The SGLV-8286 should be available at most admin offices and/or may be downloaded from the web at the following site: http://www.insurance.va.gov/sgliSite/forms/8286.pdf. The following are guidelines to be used in the preparation and distribution of the SGLV-8286 Form:

Instructions for completing the SGLV-8286

Instructions for completing the SGLV-8286 are on page 3 of the form. The member must read the instructions before attempting to complete the form.

Designating the Beneficiary(ies) - Member's absolute authority to designate or change a beneficiary

- Under federal law, the member has the absolute right to name whomever they want as their beneficiary and to change their beneficiary at any time without the knowledge or consent of the prior beneficiary.

- When a member does not designate a surviving dependent or parent as their beneficiary, a responsible representative should counsel the member to the fact that the Servicemembers' Group Life Insurance Act was specifically designed to provide some form of security for dependents or parents. The member should be encouraged to designate such dependents or parents as beneficiaries. When dependents or parents are disregarded as beneficiaries, it is desirable that the member files a written statement in their PDS along with their SGLV–8286 stating they voluntarily selected their beneficiary (ies).

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

Designations of beneficiaries who are minors

Minor Spouses - Regardless of any other law, SGLI will be paid directly to the surviving spouse when the spouse is a minor. Payment in such case shall be complete quittance to the insurer.

Other Minors - When a member wishes to name minors as beneficiaries (such as his or her own children, nephews, nieces, etc.), the member should be advised that the proceeds of the insurance couldn't be paid to a minor without a court-appointed guardian. The appointment of a guardian is often time consuming and costly and, for that reason, may delay the payment of the proceeds. The amount of the proceeds can be greatly reduced by the payment of court costs, attorney fees and expenses incurred by the guardian. One way to avoid such complication and expense is to designate a pre-appointed trustee of the minor beneficiary. Otherwise, members who insist on designating minors as SGLI beneficiaries should be referred to legal counsel (such as legal support attorney) for advice on establishment of a trust.

If member does not designate a Beneficiary (ies)

If a member does not designate a beneficiary, the insurance will automatically be paid in the following order of precedence:

- The surviving spouse of the member, if none,
- The child or children of the member, in equal shares, with the share of any deceased child to be distributed among the descendants of that child; if none,
- The biological parents in equal shares or all to the surviving biological parent; if none,

Note: This is a reason to not use the "By Law" designation. In the case of divorced parents, the proceeds are split between the member's divorced biological parents and do not go to the biological and step-parent who the member may consider to be their "Parents."

- A duly appointed executor or administrator of the insured's estate; if none,
- Other next of kin

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

Changing a beneficiary and accepting the SGLV-8286 from the member.

When a member asks to change a beneficiary, have the member immediately put the new beneficiary's name on an SGLV-8286 and sign and dated it, even if the rest of the form is incomplete. Then immediately sign and date the form as the USCG representative. This legally changes the beneficiary and makes it effective immediately.

The minimum information needed to changed the beneficiary and have an effective form is:

Member's Name
Beneficiary Name
Member's Signature and date
USCG Representative Signature and date

If you prefer a fully completed form, have the member then get the additional information and complete a new SGLV-8286 when they return. However, never send the member away for more information without first getting a signed and dated partially completed SGLV-8286. The USCG recently had a member die between the time he picked up a blank SGLV-8286 to change his beneficiary and the time he had all the information needed to fill out the form. His new wife did not get the insurance he intended to give her.

A witness must be present when SGLV-8286 is completed by the member

An authorized representative of the U. S. Coast Guard (i.e., CO, XO, OINC, XPO, Yeoman, etc.) must witness the member's signature at the time of preparation in the appropriate blocks. The date the form is received and witnessed should be accurately recorded as it determines the exact time and date when the insurance becomes effective or is reduced or cancelled and is the basis for establishing or changing payroll deductions.

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

Common errors on the SGLV-8286

Common errors that are made to the SGLV-8286 Form:

- The member does not sign the form.
- When the form is completed by the member, there is no witness or witness signature.
- The form is not filed in the member's unit PDR and SPO PDR.
- The sum total of either the primary or contingent beneficiaries does not equal 100%.
- By law designations. The member may not completely understanding how the funds will be distributed.

Process and Distribution of SGLV-8286

The following table describes the responsibilities associated with the SGLV-8286 and the distribution of the form:

Stage	Who Does It	What Happens
1	Member	Completes Form SGLV-8286 per instructions on the form
2	Witness	Signs the witness block at same time member signs the form.
3	Unit	Photocopies are made of the original form and distributed as follows: Original - CGPC (adm-3) Photocopy 1 - SPO Photocopy 2 - Member Photocopy 3 - Unit PDR (optional) **Note:** The distribution printed on the SGLV-8286 itself should be disregarded.
4	SPO	Enters SGLI information in Direct-Access **Note**: If SGLI was administratively terminated due to the arrears of premiums, the SPO shall not restart SGLI until delinquent premiums have been paid and Form SGLV-8286 has been completed per **page 5-A-8** of this section.

SGLI Family Member Coverage

Introduction

The Veterans' Survival Benefits Improvement Act of 2001 extends life insurance coverage to spouses and children of members insured under the Servicemembers' Group Life Insurance (SGLI) program. The section offers background information and procedural guidance for implementing SGLI Family Member Coverage.

Reference:

(a) ALCOAST 282/03

Eligibility

The spouses and children of Active duty service members and members of the Ready Reserve of a uniformed service are eligible for SGLI coverage only if their sponsors also have SGLI coverage.

Each dependent child (under age 18), of every sponsor covered by SGLI, is automatically covered by SGLI under family insurance regardless of the child's health. In addition, children between the ages of 18 and 23 who are full-time students, as well as any child who, before the age of 18, has been declared legally incompetent, are covered.

Ready Reserve members, who have had their SGLI coverage terminated due to non-payment, must have their accounts up-to-date before SGLI can be restarted or Family Member SGLI can be started. See page 5-A-6 of this manual for payment procedures and termination policy.

Family coverage is available only in the SGLI program, not in the Veterans' Group Insurance (VGLI) program.

Effective Date

Coverage is effective as follows:

- Spousal coverage begins on the date of marriage to the service member.
- Natural children are covered beginning on their date of birth.
- Coverage for other dependent children of the service member begins on the date when the child becomes a dependent of the member.

Continued on next page

SGLI Family Member Coverage, Continued

Coverage Amounts

The maximum amount of coverage available for spouses is $100,000. In cases where the member's SGLI coverage is less than $100,000, the maximum spousal coverage will equal the member's coverage amount.

A member may elect to insure his or her spouse for amounts less than $100,000, in increments of $10,000.

If both members are in the military and participate in SGLI, they can both be covered under SGLI and spousal coverage provided that both have their own SGLI coverage. Each can be insured under both basic SGLI and SGLI family coverage for the maximum amount of $250,000 and $100,000, respectively.

All children are covered for $10,000.

Cost of Coverage

There is no cost for child coverage and child coverage cannot be cancelled.

Refer to: http://www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/sgli.htm#Family%20coverage: to determine the monthly premium for spousal coverage.

Deduction of Premiums

Premiums for spouse coverage will automatically be deducted from the member's pay beginning with the pay period following the date a family election is recorded in Direct Access.

Continued on next page

SGLI Family Member Coverage, Continued

Form for Reducing or Declining Coverage

If the member does not want insurance coverage for his/her spouse or wants a reduced amount of coverage, he/she must complete form SGLV-8286A, Family Coverage Election, and submit the completed form to the SPO.

The forms can be obtained from the VA's or PSC's web sites:

- http://www.insurance.va.gov/sgliSite/forms/8286A.pdf
- http://www.insurance.va.gov/sgliSite/forms/8286A.doc

Members may also reduce or decline coverage for their spouse at any later date. When a member cancels spousal coverage, the coverage remains in effect **at the original level**, at no cost to the member, for 120 days after the cancellation date.

Reinstating/ Increasing Family Coverage

Members who have declined or reduced Family Member SGLI coverage can later apply for or increase coverage by completing a form SGLV-8285A and providing proof of insurability (proof of good health).

Spousal Notification

Units must notify the member's spouse, by letter, when the member declines SGLI or Family Member SGLI coverage. This is to inform the spouse that they have 120-days from the date the coverage is terminated to convert Family Member SGLI to commercial coverage. A recommended format for the spousal notification letter follows. A copy of the letter, the unit has sent to the spouse, should accompany any SGLV-8286/8286A forms sent to the SPO from members declining coverage.

An example of the spousal notification letter is on the following page.

Continued on next page

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG NAME OF UNIT
(HEADER DOUBLE-CLICK TO EDIT)

123 A
CITY
Staff
Phne
Fax:

1741 DD Month YEAR

First Name Last Name
Street Address
City, ST Zip

Dear (Mr. Mrs.) (Salutation may be omitted)

We are writing to inform you of Servicemembers' Group Life Insurance (SGLI) or Family SGLI (spouse) coverage changes made by your active duty or reserve member spouse. The purpose of this letter is to notify you of the cancellation of [or impending termination of] your coverage so you may exercise the 120-day conversion benefit. When a member cancels spousal coverage, the coverage remains in effect, at no cost to the member, for 120 days after the cancellation date

You have 120-days from (*enter date of member's election*) to exercise this conversion benefit.

During this 120-day period you can convert this coverage to a policy with a commercial insurance company. Upon request, the Office of Servicemembers' Group of Life Insurance (OSGLI) will provide you with conversion information and a list of participating companies. You can get more information at the VA insurance website at www.insurance.va.gov, or by calling OSGLI at (800) 419-1473. You may also request this information by e-mail to OSGLI.OSGLI@PRUDENTIAL.COM, or writing to:

Office of Servicemembers' Group Life Insurance
290 West Mt. Pleasant Avenue
Livingston, New Jersey 07039

The block checked below indicates what action your spouse has taken in declining coverage. Your spouse elected to:

___ Decline his/her SGLI life insurance. When a member declines SGLI for self or family coverage, coverage for the spouse is terminated.

___ Decline his/her SGLI Family (spouse) Coverage

Sincerely,

F. M. LAST
Rank/Rate
U. S. Coast Guard
Commanding Officer/By direction of the Commanding Officer

Casualty Reporting

Introduction

This information is provided to direct you through the process of casualty reporting.

Reference

(a) PERSMAN, Chap 11-A, Casualties
(b) PPPM, Encl. (7)

Reporting procedures

Reporting procedures are covered in the Personnel Manual along with the disposition of personal effects.

Examples of the following are contained in Ref: (b) of this manual.

- Personnel casualty report message
- Next of kin notification
- Commanding Officer's letter to the next of kin
- Letter request for death determination

Inventory and Disposition of Personal Effects

In cases where a member dies or is missing, complete a CG-3853 (Personal Effects Inventory and Disposition) in accordance with Section 11-A of the Coast Guard Personnel Manual, PERSMAN. Distribute the form as follows:

Original and two copies: To the officer designated by the Commanding Officer to assume custody of the effects.

- Officer retains original
- One copy is to be packed with personal effects.
- Second copy is sent to next of kin (If personal effects are shipped to next of kin. Otherwise, second copy goes to Supply Center, Baltimore. IAW PERSMAN, Art. 11-A-11.b (3)

Copy: Unit PDR
Copy: COMDT (G-WPM) (if deceased, captured, missing or incapacitated) PERSCOM ((epm), for enlisted/(opm) for officers) if absent at time of sailing, AWOL, AOL, or deserter.
Copy: Unit File

Continued on next page

Casualty Reporting, Continued

Disposition of Military Personnel Data Records (PDRs)

The unit shall forward Unit and Medical PDRs to the SPO within two days of:

- Declaring member a deserter
- Member's death

The SPO shall forward Unit, Medical, and SPO PDRs to Commander (adm-3), Coast Guard Personnel Command within 5 days of the date of death or date member was declared a deserter.

Note: Complete instructions for PDR maintenance and disposition can be found in the Military Personnel Data Records (PDR) System, which is reprinted as Appendix (D) to this manual.

Section Overview

Introduction

This section will guide you through the procedures required for members with dependents. It will assist you in reporting dependency changes, enrolling in the TRICARE Dental Plan, and issuing dependent ID cards.

In this section

Topic	See Page
Dependency Information	5-B-2
BAH/Dependency Data Form	5-B-4
TRICARE Dental Plan	5-B-6
Applying for a Uniformed Service Identification and Privilege Card (DD Form 1173)	5-B-10
Verification of Eligibility for the DD Form 1173	5-B-12
Reserve Family Member Identification Card (DD Form 1173-1)	5-B-14
Information concerning the Application For Uniformed Services Identification Card-DEERS Enrollment (DD Form 1172)	5-B-17
Defense Enrollment Eligibility Reporting System (DEERS)	5-B-19

Dependency Information

Introduction

In order to avoid overpayment, underpayment and to determine eligibility for benefits and privileges administered by the uniformed services, members must notify their units/SPOs immediately upon a change in dependency status.

References

(a) PAYMAN
(b) ID Cards (DODINST 1000.13) Procedures for manually issued (non-RAPIDS) ID cards.
(c) Air Force Instruction 36-3026(I) Identification cards for members of the uniformed services, their eligible family members, and other personnel.
Note: DODINST 1000.13 and AFINST 36-3026(I) are available on the PPPM web page at http://www.uscg.mi./hq/psc/3pm.htm

Responsibility

The member has responsibility for reporting dependency status changes. Complete a Dependency Worksheet (CG PSC-2020) if a member:

- Gets Married, Separated or Divorced
- Has an incapacitated child who turns 18

Note: If the member is approaching retirement, forward supporting documentation regardless of the age of the child

- Gains or loses a dependent (e.g., after a dependent dies, marries or divorces and reverts to dependent status)
- Has a questionable case of dependency

Final divorce decree not available

To avoid overpayment, members with no other dependents who are awaiting a copy of a final divorce decree should request payment of BAH, OHA and/or COLA at the with dependents rates be stopped effective the date the divorce will become final. The divorce decree must be provided when it becomes available.

Systems that need to be updated

When a member reports a change in dependency, the information is recorded in the JUMPS system, for pay purposes, and in the Defense Eligibility Enrollment System (DEERS), to record eligibility for benefits and privileges.

Continued on next page

Dependency Information, Continued

Annual Verification

Annually, during the month of November, members must verify their computer generated BAH/Dependency Data form. Refer to Section 5-C of this manual for procedures on the annual verification.

Note: Redetermination of unique dependency status cases conducted by PSC (LGL) will be conducted only during the annual verification of the BAH/Dependency Data form.

Forms

This table shows the forms that may be needed when a member has a change in dependency. To determine when to use a form and the procedures for completing the form, consult the reference.

Form	Purpose	Reference
Application For Uniformed Service Identification Card- DEERS Enrollment (DD-1172)	Determine entitlement to ID cards, medical care, exchange, theater, and commissary privileges. Update DEERS database	PPPM 5-B-19 and APPEN (B)
Designation of Beneficiaries (CG PSC-2020D)	Casualty reporting, list next of kin and designate beneficiaries	PPPM 5-A-2
Dependency Worksheet (CG PSC-2020)	Provide dependency information to SPO and also to determine eligibility for payment of BAH with dependents	PPPM Encl. (1)
DOD Guard and Reserve Family Member ID Card DD-1173-1	Identify dependents of Ready Reserve Members	PPPM 5-B-16 and APPN (B)
Full-Time Student Statement (CG PSC-2020B)	Supporting documentation for a member claiming a child over age 21 as a dependent	PPPM Encl. (1)
SGLI Election and Certificate (SGLV-8286)	Elect SGLI amount and designate beneficiaries	PPPM 5-A-7
Support Statement (CG PSC-2020A)	Supporting documentation for a member claiming a parent or parent-in-law as a dependent	PPPM Encl. (1)
Uniformed Services Identification and Privilege Card (DD-1173)	Identify individual eligible for dependent benefits and privileges	PPPM 5-B-12 and APPEN (B)

BAH/Dependency Data Form

Introduction

The BAH/Dependency Data form is computer generated via Direct Access. Members update the information contained in the BAH/Dependency Data form by submitting a Dependency Worksheet (CG PSC-2020) with the new data to their SPO. Instructions for completing the CG PSC-2020 are on the back of the form.

Purpose

The BAH/Dependency Data form is an official document required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
- Name of person(s) receiving death gratuities
- Person(s) who receive allotment of pay if missing or unable to transmit funds
- Person(s) who receive unpaid pay and allowances
- Record dependents as defined in the PAYMAN to determine dependency for BAH entitlement purposes
- Verify (on an annual basis) that dependents, on who BAH is being paid, continue to be related to and supported by the member.

Annual Verification

Annually, during the month of November, members must verify their computer generated BAH/Dependency Data form. Refer to Section 5-C of this manual for procedures on the annual verification.

Other uses for the BAH/ Dependency Data form

The BAH/Dependency Data form may be used as partial supporting documentation as long as the individual claimed as a dependent remains a dependent.

Here are some examples of when the BAH/Dependency Data forms may be used as partial supporting documentation:

- Payment of family separation allowance and/or family separation - housing
- Payment of station allowances at the with dependents rate
- Payment of dislocation allowance at the with dependents rate
- When applying for dependent ID cards and DEERS privileges

Continued on next page

BAH/Dependency Data Form Form, Continued

Cases not to use the Dependency Worksheet (CG PSC-2020)

Do not use the CG PSC-2020 to designate a beneficiary or change amount of coverage for:

- National Service Life Insurance
- Servicemembers' Group Life Insurance (use VA Form SGLV-8286)
- Government Life Insurance

When to submit the Designation of Beneficiaries (CG PSC-2020D

The CG PSC-2020D will be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Anytime a member acquires an initial or additional dependents
- When any material change occurs in dependency status.
- (Separation, divorce, death of dependent, dependent entering the Armed Forces, voluntarily withdrawing dependency claim, etc.)

Note: When removing any dependent from the BAH/Dependency Data that originally required PSC approval of the dependent, a copy of the new BAH/Dependency Data form must be forwarded to PSC (LGL).

- Changes to the form occurring in any item

TRICARE Dental Plan

Introduction

The TRICARE Dental Program (TDP) replaced TRICARE dental programs for active duty family members (TFMDP) and Selected Reserve (SELRES) personnel (TSRDP).

Reference

(a) PAYMAN, Chap 6-C
(b) http://tricare.osd.mil/ TRICARE website

Discussion

Members desiring coverage under the TRICARE Dental Plan must enroll through the dental contractor, United Concordia Companies, Inc. (UCCI). Enrollment in the plan is automatic for members previously enrolled in the Family Member Dental Plan (FMDP). All other active duty members and SELRES and IRR personnel must enroll to participate.

- TDP provides the same dental benefits to all participants.
- Premiums will be paid through payroll allotment from the sponsor's pay for family members of active duty personnel. In some cases, it may be direct billing.
- Premiums for reservists will be paid by deduction from the member's pay or by direct billing. Premium payments for a reservist's family members will be made by direct billing.

Eligibility

The TDP is a voluntary, comprehensive dental program offered worldwide by the Department of Defense to family members of all active duty Uniformed Service personnel and to Selected Reserve and Individual Ready Reserve (IRR) members and/or their family members. United Concordia is the administrator of this program.

TDP premiums

There are two premium rates:

- Single – members with only one dependent or themselves enrolled
- Family – members with two or more dependents enrolled.

Continued on next page

TRICARE Dental Plan, Continued

Automatic premium changes

Premiums will automatically change (if applicable), when dependent:

- Child turns
  4 years old,
  21 years old and is not enrolled in a full time course of instruction,
  23 years old and is a student, or
- Status changes

Enrollment requirements

Enrollment into TDP is subject to the family member(s) being enrolled in DEERS (prior to applying for enrollment in TDP), and the family member(s) must remain enrolled for a minimum of twelve months.

Enrollment options

Enrollment in the TDP may be through a single or family plan. A Selective Reserve or IRR member is eligible to enroll under a single plan for him or herself. Eligible family members are enrolled under a separate single or family plan.

Under the TDP, all eligible family members of a sponsor must be enrolled if any one of them is enrolled with the following exceptions:

- Children under the age of four
- Eligible family members residing in two or more geographically separate locations
- For active duty family member only, and in instances where a family member requires a hospital or special treatment environment (due to medical, physical handicap, or mental condition) for dental care otherwise covered by the TDP, the family member may be excluded from TDP enrollment
- Selected Reserve and IRR sponsors may enroll independently of their family members

Continued on next page

TRICARE Dental Plan, Continued

Enrollment period

- Regardless of previous enrollment, all new enrollees must remain enrolled in the TDP for at least 12 months. After completing the 12-month minimum enrollment period, enrollment may be continued on a month-to-month basis. Anyone who fails to pay premiums or disenrolls for other than a valid disenrollment reason will be prohibited from re-enrolling in the program for 12 months.
- Members who were enrolled under the TRICARE Family Member Dental Plan (TFMDP) or TRICARE Selected Reserve Dental Program (TSRDP) prior to February 1, 2001 are required to complete their original enrollment commitment.

Disenrollment requirement

The member may disenroll dependents(s) from TDP only:

- After the dependent has been enrolled for a period of 12 months.
- When a sponsor or family(s) member loses DEERS eligibility.
- If transferred PCS and dependent space available care is available at a Military Medical Treatment Facility. Disenrollment must be accomplished within 90 days of reporting to the new duty station.
- When an active duty, Selected Reserve or IRR member is transferred to the Standby Reserve or Retired Reserve.

Automatic disenrollment

Automatic disenrollment will occur when:

- One member in a joint service marriage leaves the Uniformed Services and has family members assigned to him or her. The family member(s) can be re-enrolled to the other service member without incurring a new 12-month lock-in.
- The sponsor transfers to the Reserve component.
- A member of the Reserve component transfers to active duty.
- Sponsor changes from one branch of service to another.
- A Selected Reserve or IRR member is called to active duty for greater than 30 days the member is disenrolled.

Continued on next page

TRICARE Dental Plan, Continued

Effective date of coverage

When United Concordia receives an enrollment form, they will confirm eligibility in DEERS and enroll the member(s) in the TDP. If enrollment form is received by the 20th of the month, coverage is effective the first day of the month after the month in which a sponsor enrolls and one month's premium payment is received.

Evidence of coverage

United Concordia will issue evidence of enrollment to all enrollees. In addition, each enrolled member will receive a TDP Identification (ID) Card that should be presented at each dental office visit. Replacement ID cards can be requested by calling United Concordia's Enrollment and Billing Department at 1-888-622-2256.

New enrollment in the TDP

United Concordia handles the enrollment process. Enrollment must be initiated by the sponsor and is accomplished by completing a TDP Enrollment Form. Forms are available by calling United Concordia at 1-888-622-2256 to request a form, by accessing the United Concordia website at http://www.ucci.com/, or from your Health Benefits Advisor. With the initial enrollment application, all new enrollees must submit a payment equal to the member's portion of one month's premium.

Applying for a DD Form 1173

Introduction

The DD Form 1173 is used to identify individuals eligible for privileges administered by the uniformed services. This will guide you through the application process.

References

(a) PERSMAN, Chap. 18-C, Uniformed Service Identification and Privilege Card, DD Form 1173
(b) ID Cards (DODINST 1000.13) Procedures for manually issued (non-RAPIDS) ID cards.
(c) Air Force Instruction 36-3026(I) Identification cards for members of the uniformed services, their eligible family members, and other personnel.

Note: DODINST 1000.13 and AFINST 36-3026(I) are available from the PPPM web page at http://www.uscg.mil/hq/psc/3pm.htm

How to apply

This is the process for applying for a DD Form 1173

When	Then
the member is active duty CG and at the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is away from the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is on extended deployment outside CONUS	the dependent can renew an expired card at any military installation that issues ID cards.
the active duty member is retiring,	before retiring submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the active duty members is placed on the Temporary Disability Retirement List,	submit a DD Form 1172 to any military installation that issues ID cards.
the reserve member is retired with pay,	submit a DD Form 1172 for the dependent to any military installation that issues ID cards.
the member is a 100% disabled veteran,	submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the member is separating and is eligible for Transition Assistance benefits	submit a DD Form 1172 for the member and dependent(s) to the command holding the PDR.

Continued on next page

Applying for a DD Form 1173, Continued

How to apply (continued)

When	Then Submit the following to PSC (RAS)
The member is from an armed force of a foreign nation	• DD Form 1172
The member has a foreign marriage or divorce	• DD Form 1172 • Translated copy of foreign marriage certificate/divorce decree
The member has a dependent parent or parent-in-law	• DD Form 1172 • Support Statement, (CG PSC 2020A) • Copy of member's tax return (IRS Form 1040/1040A showing parent claimed as dependent)
Member has a child over age 21 incapable of self support	• DD Form 1172 • Support Statement, (CG PSC 2020A), • Medical/psychological statement of incapacitation • Social Security Administration determination concerning Medicare Part A entitlement • Copy of member's tax return (IRS Form 1040/1040A showing child claimed as a dependent)
The member has an unremarried or unmarried former spouse AND this is an initial ID card issuance (the former spouse is not enrolled in DEERS)	• DD Form 1172 • Statement for Former Spouse, (CG PSC 2020C), see Encl. (1) • Certified copies of marriage and divorce decrees

How to complete the DD Form 1172 and DD Form 1173

Detailed instructions on how to complete the DD Form 1172 and DD Form 1173 can be found in Appendix (B) to this manual.

Verification of Eligibility for the DD Form 1173

Introduction

This information is provided to aid you in determining the eligibility of a member's past and present dependents for the DD Form 1173.

Reference

(a) PERSMAN, Article 18-C-2, Eligibility

Verification of eligibility

Any ID card issuing unit can verify eligibility and issue original cards by using DEERS or by presentation of:

- Retirement orders
- DD-214
- Marriage, birth, or death certificate
- VA letter of certification

If eligibility cannot be established

When eligibility cannot be established through DEERS or by documentation presented then contact these offices;

Coast Guard	COMMANDER (RAS) COAST GUARD PERSONNEL SERVICE CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591 (800) 772-8724/(785) 357-3416
Air Force	HQ AFCGPC/DPMDOP NORTHEAST OFFICE PLACE 9504 I H 35 NORTH SAN ANTONIO TX 78233-6636 (210) 652-2089
Marine Corps	COMMANDANT OF THE MC CODE: MMSR6 WASHINGTON DC 20380-0001 (202) 614-1031/1038

Continued on next page

Verification of Eligibility for the DD Form 1173, Continued

If eligibility cannot be established continued	**Army**	COMMANDER, TAPC ATTN: TAPC-PDO-IP 200 STOVALL AVE. ALEXANDRIA VA 22332-0474 (703) 325-9590
	Navy	COMMANDING OFFICER BUREAU OF PERSONNEL PERS-334 WASHINGTON DC 20370-5334
	USPHS	(301) 443-9000
	NOAA	(301) 443-8616

Entitlements on the DD Form 1173

Eligibility of the spouse and unmarried children of active duty members may be certified if information on the DD Form 1172 is the same as indicated on the approved BAH/Dependency Data form.

Reserve Family Member Identification Card

Introduction

The Reserve Family Member Identification Card (DD Form 1173-1) was developed for use by all military services. The Coast Guard uses it for identification only. It has no authorization for access to military benefits unless accompanied by a set of valid active duty orders or pay voucher.

How to apply

The process for applying for a DD Form 1173-1:

If	Then
the member is from the Selective Reserve,	submit a DD Form 1172 to any unit authorized to issue ID cards
the member is from the Ready Reserve or Retired Reserve,	submit a DD Form 1172 to PSC (RAS)

Dependent eligibility

A dependent is considered to be a spouse, child, stepchild, or ward.

If	Then the dependent is
the dependent's sponsor is in the Ready Reserve (which includes the Selective Reserve and the Individual Ready Reserve) or Retired Reserve,	eligible.
the dependent is over 21 or under 10, a former spouse, or requires dependency determination,	ineligible.

Continued on next page

Reserve Family Member Identification Card, Continued

Preparation

Commands designated as issuing activities for DD Form 2 CG (Reserve) are designated issuing activities for DD Form 1173-1. Issuing activities may issue DD Form 1173-1 upon receipt of a properly completed and verified DD Form 1172.

Application over 90 days old

At the discretion of the commanding officer, a DD Form 1172 verified more than 90 days before presentation to the issuing activity may be considered questionable for issuance of the DD Form 1173-1. Before refusing any person in this situation, the issuing activity should assist the applicant in attempting to contact the officer who verified the DD Form 1172.

Dependent not able to visit issuing office

In unusual circumstances where an eligible dependent cannot get to an issuing activity, a notarized statement setting forth sufficient facts to establish identity, a completed DD Form 1173-1, and the reasons for not going to the issuing office may be accepted as a basis for issuing a DD Form 1173-1.

Corrections

No DD Form 1173-1 will be issued which contains an erasure, alteration or strikeover. When a change is required on a card in the preparation stage, a new card will be prepared.

Instructions

Most entries on the DD Form 1173-1 are self-explanatory;

Item	Input
1	Enter last name, first and middle initial and relationship code of sponsor
2	Enter height in inches. Valid range 00-96
3	Enter weight in pounds
4	Enter eye color

Continued on next page

Reserve Family Member Identification Card, Continued

Instructions (continued)

Item	Input
5	Enter hair color
6	Enter SSN (e.g., 000 00 0000)
7	Enter date of birth (YYYYMMMDD)
8	Enter a maximum of 4 years from date of verification, the sponsor's expiration of service date or child's 21st birth date, whichever occurs first (YYYYMMMDD)
9	Each recipient must sign this block, use (incp) for permanent incapacitation or (inct) for temporary
10a	Enter pay grade and sponsor's name (Last, First, MI)
10b	Enter sponsor's SSN (e.g., 000 00 0000)
10c	Enter organization the sponsor is attached
10d	Enter the correct abbreviation for the sponsor's status from block 4 of DD Form 1172
11	Enter district and number, issuing facility, city state (e.g., CGD14(APRU)HONOLULU, HI)
12	Enter year, month, date issued (YYYYMMMDD)
13	Verifying official must sign here

DEERS enrollment

ID issuing activities should handle DD Form 1172 for the reserve family member ID card in the same manner as those for all other ID cards. In addition, place "X" in the pre-enrollment block in the upper left-hand corner of the form.

Information Concerning the DD Form 1172

Introduction

This information has been provided to guide you through the process of completing a DD Form 1172.

Reference

(a) PERSMAN, Chap 18-C, Uniformed Service Identification and Privilege Card.

Preparation of DD Form 1172

Detailed instructions on how to complete the DD Form 1172 can be found in DODINST 1000.13 and AFINST 36-3026(I), which are available from the PPPM web page at http://www.uscg.mil/hq/psc/3pm.htm

Section I, sponsor information

This section will be completed by or for the sponsor or applicant. Complete block 9 only when an ID card is issued to the sponsor.

Section II, dependent information

This section will be completed by or for the sponsor. Dependents under age 10 will be listed for DEERS enrollment purposes using the same guidelines for expiration of eligibility as though they were receiving a card. Do not list dependents already enrolled in DEERS every time a DD Form 1172 is submitted. For additional space use another DD Form 1172.

Section III, sponsor declaration and remarks

A DEERS check should be the first source for verification and the only substantiation if the applicant is enrolled. An active duty sponsor's refusal to apply for a DD Form 1172 shall be treated as nonsupport.

Reporting loss or theft of an ID card

The loss or theft of an identification card will be reported by entering the following statement in Section III:

"I certify that the identification card previously issued to (insert name of cardholder) was (insert "lost" or "stolen") under the following circumstances (give complete circumstances surrounding loss or theft). If the card is recovered I will surrender it to proper military authority."

Continued on next page

Information Concerning the DD Form 1172, Continued

Questionable cases

If the eligibility of a claimed dependent is questionable, call PSC (RAS), 1-800-772-8724, for determination.

Privileges authorized

This table describes types of privileges used and abbreviations.

Privilege	Authorized	DD 1172 abbr.
Commissary	Use of the commissary	C
Theater	With unlimited exchange privileges or when sponsor resides in Government Quarters	T
Exchange Unlimited	Unlimited exchange usage and all privileges	EU
Exchange Limited	All exchange privileges except for purchase of uniform and State-tax-free products like alcohol and tobacco	EL
Medical care Uniformed Services	To receive both inpatient and outpatient care at any Uniformed Services medical facility subject to space available	MS
Medical care Civilian	Care, both inpatient and outpatient, from civilian source using CHAMPUS	MC

Defense Enrollment Eligibility Reporting System (DEERS)

Introduction

DEERS is a database operated by the Department of Defense that houses data on all military sponsors and dependents to support the benefits system.

Data on sponsors

Data on sponsors is provided to DEERS through magnetic tape submission from PSC and other uniformed services finance centers. USCG sponsors are enrolled and updated on DEERS when changes in the Direct Access database are transmitted to DEERS.

Procedures for transmitting data to DEERS

Procedures for updating the DEERS database using electronic on-line systems or floppy diskette applications are provided by the DEERS Support Office (DSO).

- Manual submissions of completed DD Form 1172s are not authorized.
- ID card issuing activities that do not have the capability to update the DEERS database using electronic on-line systems or floppy diskette applications should contact the appropriate district or MLC personnel office for local procedures used to update DEERS.

When to update DEERS

DEERS must be updated when:

- An ID card is issued.
- A member reports a change in dependency (e.g., birth, divorce) or a change of address that does not involve issuance of an ID card.
- The member's residence address must be updated within 30 days of a residential move such as during PCS or any other exchange in residence. Exceptions to this rule are those circumstances when a member is:
  a) Permanently assigned overseas.
  b) Assigned to a vessel.
  c) Assigned to a routinely deployable unit.
  d) Assigned to units the Commandant has determined should not be disclosed due to national security or safety concerns.

Continued on next page

Defense Enrollment Eligibility Reporting System (DEERS), Continued

Updating residential address

Member's can update their residential address one of the following ways:

- At any Real time Automated Personnel Identification System (RAPIDS).
- By calling the DEERS Support office (DSO) listed below.
- In writing to: DSO, 400 Gigling RD, Seaside, CA 93955-6771.
- By faxing address change to DSO at: (831) 655-8317.
- By E-mail to DSO at: addrinfo@osd.pentagon.mil.
- At any Military Treatment Facility (MTF).

DEERS inquiries

Beneficiaries with questions or problems with DEERS enrollment may call the DEERS beneficiary telephone center to verify the information contained in the database.

Note: The beneficiary center can only update residence address information in DEERS over the phone. If information other than the residence address is incorrect, the caller will be instructed to contact their servicing personnel office to have the database updated.

Phone numbers for DEERS beneficiary telephone center

If calling from	Then dial
California	800-334-4162
Alaska or Hawaii	800-527-5602
All other states	800-538-9552

Reports from the DEERS database

Information in the DEERS database can be used to produce enrollment listings, pantograph listings, demographic reports and other type of reports.

Obtaining DEERS database reports

Units may request DEERS database reports from the USCG Liaison at the Defense Manpower Data Center (DMDC).

The phone number for USCG Liaison at DMDC is: (831)-583-2400 Ext 4346.

Section Overview

Introduction

This section provides you with the necessary procedures for annual verification of entitlements, statement of creditable service, security clearances, and information regarding the PDIF and PDE.

In this section

Topic	See Page
Annual Verification of BAH, Dependency, Beneficiaries, SGLI, and Emergency Data	5-C-2
Requesting Statements of Creditable Service	5-C-5
Personnel Data Information File (PDIF)	5-C-8
Personnel Data Extract (PDE)	5-C-9
Security Clearances	5-C-10
Transcript of Sea Service (TOSS)	5-C-11

Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts

Introduction Annually during the month of November, members must verify their BAH, dependency, beneficiaries, SGLI and emergency data.

Reference (a) PAYMAN
(b) PERSMAN

Verification Procedures Here is how verification of the BAH, Dependency, SGLI, Beneficiaries and Emergency Contacts works:

Stage	Who Does It/ When	What Happens
1	SPO 1s Week of Nov	Forwards the following forms and worksheets to units: • Direct Access BAH/Dependency Data Forms • Direct Access Emergency Contact Information Report • Copies of member's SGLI Elections forms (SGLV-8286 & 8286A) • Copy of member's Designation of Beneficiaries (CG PSC-2020D) form **Note:** If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms and Designation of Beneficiaries forms, this step is unnecessary as the unit can generate the BAH/Dependency Forms and Emergency Contact Information Reports from Direct Access using Command Self-Service access.

Continued on next page

Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

Verification Procedures. Continued

Stage	Who Does It/ When	What Happens	
2	**Unit/ Upon Receipt**	Forwards all forms and Emergency Contact Reports to the member for verification. Also provides members with blank, or with instructions to access, CG PSC-2020D, Beneficiary Designations form.	
		If a form or report is	**Then**
		not received for a member or is lost or destroyed.	Use the Direct Access BAH/Dependency Form or Emergency Contacts Report print procedure to generate a new form/report for the member's verification. Provide the member a blank SGLI election form to complete.

Continued on next page

Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

Verification Procedures. Continued

Stage	Who Does it	What Happens
3	Member NLT 30 Nov	1. Completes CG PSC-2020D, Beneficiary Designation form. Forwards original to SPO/SPO, retains copy for Unit PDR if one is maintained. 2. Reviews BAH/Dependency Data for accuracy: • Annotates any necessary changes or corrections. • Signs and dates in the "Members Certification" area. • Returns to SPO, includes CG PSC-2020, BAH Dependency Worksheet, and supporting documentation if adding/removing BAH eligible dependents. 3. Reviews Emergency Contact Report for Accuracy: • Enters any changes or corrections in Direct Access using self-service. Or, if unable to access the system, annotates changes on report and returns to SPO/SPO data entry.
4	SPO	Enter, into Direct Access, any changes or corrections the member noted using the appropriate process: • Dependent/Beneficiary to add or change information about dependents (Note: Appropriate Direct Access entries must be completed if dependency change impacts entitlements) Generate a new BAH/Dependency for and forwards to member for signature. • Emergency Contact to add or change emergency contact information. • Life and AD/D Benefits to make SGLI election changes (Note: Data entry is only required when member is changing a SGLI/Family SGLI election, i.e. increasing, decreasing or declining coverage. No data entry is required if the member is only updating beneficiary designation.) • Files SGLI forms, BAH/Dependency forms and CG PSC-2020D forms in section 4 of SPO PDR.

Requesting Statements of Creditable Service

Introduction

This will assist you in requesting a Statement of Creditable Service (SOCS) and/or a Statement of Creditable Sea Service (SOCSS).

Procedure for requesting Statements of Creditable Service

This is the procedure for requesting statements of creditable service/sea service on a USCG/USCGR member with a Pay Base Date (PBD), Active Duty Base Date (ADBD) and/or creditable sea pay time problem. You should request a SOCS/SOCSS for the following members who meet these criteria:

- Newly assigned (PCS) USCG/USCGR member with prior service that has not been verified;
- Any reserve member entering Extended Active Duty for more than 139 days must have request for a SOCS submitted for ADBD verification regardless of the fact that a SOCS may have been previously completed.

Note: Do not ignore suspected sea time errors simply because a member is not currently assigned to a sea pay eligible vessel. Take immediate action.

Continued on next page

Requesting Statements of Creditable Service, Continued

Procedure for requesting Statements of Creditable Service, Continued :

Stage	Who Does It	What Happens
1	UNIT	Reviews the member's PDR and any supporting documents the member has, notes the specific period of service/sea service the member is disputing and forwards to the SPO. • Members can help the process by providing any documents they have that substantiate prior service, such as a DD Form 214, any reserve point statements, orders, or a Navy Statement of Service. • If a member requests career sea service validation for the purpose of Merchant Marine licensing, be aware that the document required by the Merchant Marines is a Transcript of Sea Service (TOSS) (PSC 1075). Do not confuse this with a SOCSS, because the TOSS will include periods of service aboard vessels not eligible for sea pay/time (see 5-C-9 of this section for requirements on requesting TOSS).
2	SPO	Reviews the Direct Access database to verify whether or not a SOCS has already been completed. Home > Administer Workforce > Administer Workforce (GBL) > Use > **Statement of Creditable Service** • If a SOCS has not been completed, and it can be verified that the member is not receiving credit for a specific period of *prior* service/sea service, request a SOCS/SOCSS from PSC (SES) by Memorandum (Memo) and attach all supporting documentation. The Memo request needs to contain the member's full name, EMPLID, service branch, and period of service. VERY IMPORTANT: If there is a DD-214 or other documents supporting creditable service and/or sea service, and the member's pay base date, active duty base date or sea pay longevity is incorrect, the member can request an immediate adjustment. *The request must be sent to PSC (SES) and must indicate: "The member has been counseled and understands that if the pay base date, active duty base date or total sea time, based on the DD-214, is not supported by the prior service records, the member may be in an overpaid status".*

Continued on next page

Requesting Statements of Creditable Service, Continued

Procedure for requesting Statements of Creditable Service, Continued

Stage	Who Does It	What Happens
2 Continued	**SPO** Continued	**Note:** Please ensure that periods of Coast Guard sea service or ADT that are in dispute are processed via the SPO transmittal. There is no need to request a SOCS/SOCSS in these instances because the transmitted documents will result in the member's JUMPS account being adjusted correctly.
3	**PSC**	Is responsible to verify and validate all periods of prior service (all branches) and sea service to adjust a member's Pay Base Date (PBD), Active Duty Base Date (ADBD) or cumulative sea service time. • With supporting documentation by the SPO, makes interim adjustment to member's service dates and/or sea service time. The member must provide a statement indicating that the interim adjustment may put him/her in an overpaid status (as discussed in stage 2 on previous page). • Request records from Headquarters or from the appropriate record center (if applicable). • Verifies dates. • Issues member a SOCS (PSC Form 1071) and/or a SOCSS (PSC Form 1072). • Makes necessary adjustments to member's pay account. **Note:** Completing the process can take from 3 to 6 months, depending on how quick the other Service responds to the request. The most difficult part of this process is retrieving the necessary information needed from the other Services. Please allow 90 days for processing of SOCS/SOCSS requests by PSC before submitting any follow-up or tracer requests.
4	**SPO**	Once the SOCS/SOCSS has been forwarded to the SPO, ensure a copy is retained in the SPO PDR, and forward a copy to the unit requesting verification. **Note:** If the original SOCS/SOCSS is found to be in error, because of an incorrect date or missing period of service/sea service, please forward the original SOCS/SOCSS with all documentation to PSC (SES) by memo, with the periods in dispute clearly addressed.
5	**UNIT**	After PSC completes the SOCS/SOCSS and the SPO forwards the package to the unit, the member should be made aware of the impact the SOCS/SOCSS will have on his/her PBD, ADBD, or cumulative sea service. Member should also be aware that a credit or debit to his pay will probably occur due to the change in his/her PBD, ADBD, or cumulative sea service. **Note:** Unit should ensure member understands and agrees with SOCS/SOCSS and then notify SPO by deadline date contained in the letter.

Personnel Data Information File (PDIF)

Introduction

The Personnel Data Information File (PDIF) is a Direct Access generated summary of personnel data.

When will units receive a PDIF

Units can expect a PDIF to be provided by the SPO at the following times:

- Within 5 working days after a member reports in PCS
- Upon the request of the unit

Note: If you are not receiving the PDIFs for all of the members assigned to your unit, contact the SPO and ask them why you are not receiving them.

SPO to Unit Transmission

The SPO has the ability to send PDIFs to the unit via E-mail or by printed copy via regular mail. Units should inform their SPO which method is preferred.

Personnel Data Extract (PDE)

Introduction

The Personnel Data Extract (PDE), CG-4902, is periodically produced by **Direct Access** and provides important personnel database information.

The PDE

The PDE is provided to give the member a description of all the items in the database concerning the next servicewide exam cycle or warrant officer appointment cycle. It is issued prior to each active and reserve exam cycle.

Upon receipt

Follow these rules upon receipt of a PDE.

If	Then
no errors are found,	member signs and returns to unit
errors are found or suspected,	forward to the SPO with necessary supporting documents

Note: Responsibility for verification of PDE information rests solely with the member through the assistance of the command.

Security Clearances

Introduction	This has been provided to help you locate the policies and procedures for maintaining personnel security clearance information.
Reference	(a) PERSEC, Chap. 2, Administrative Procedures.
Personnel Security Record	When the Central Adjudication Facility (CAF) makes a favorable security determination, notification is made via Direct Access updates and by a certificate of clearance known as the source document. This source document shall have a properly executed SF-312 and CG-5588 attached and is filed in the member's PDR.
Preparation and Maintenance of Security Documents	Policies and procedures governing the preparation and maintenance of security documents can be found in the, PERSEC.

Transcript of Sea Service (TOSS)

Introduction

A Transcript of Sea Service (TOSS (CG PSC-1075)) is used to document service on board Coast Guard vessels for the purpose of obtaining a Merchant Marine License. The Transcript of Sea Service lists information regarding a member's sea service, including:

- Names of vessels
- Shaft Horsepower
- Dates the member served on each vessel
- Rank at time of departure from each vessel

Note: This document does not serve to verify creditable sea service for pay purposes (refer to 5-C-3 of this section).

How to obtain a Transcript of Sea Service

If a member desires that a Transcript of Sea Service be prepared, the following must occur:

Stage	Who does it	Action to be taken
1	SPO	Request TOSS (CG PSC 1075) via Memorandum or E-mail and forward to PSC (SES). **Note:** The request should include the date the member entered the service and a summary of vessels he/she served on.
2	PSC (SES)	Issues CG PSC-1075 within 30 days of the date PSC received the request. The original and a copy are mailed to the SPO.
3	SPO	Forwards the original TOSS to the member and files the copy in SPO PDR.

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Section Overview

Introduction

This section provides you with the information needed to understand and perform miscellaneous personnel transactions that are not covered in any other section of this manual.

In this section

Topic	See Page
Leave Authorization (CG-2519)	5-D-2
Leave Carried over in Excess of 60 Days	5-D-4
Preparation of the DD Form 2 CG (active ID card) and DD Form 2 (retired ID card)	5-D-6
Personal Clothing and Equipment Record (AF form 538)	5-D-9
Reporting Change in Mailing Address	5-D-11
Employment Verification	5-D-12
E-Resume	5-D-13
Assignment/Termination of Government Quarters	5-D-14
Permissive Travel Authorization	5-D-16
Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator	5-D-17
TRICARE Selected Reserve Dental Program	5-D-19

Leave Authorization (CG-2519)

Reference

(a) PERSMAN, Chap. 7-A, Leave
(b) ALCOAST 387/04
(c) Direct Access Online Manual

CG-2519 usage

The Leave Authorization (CG-2519) is used to authorize:

- Regular, sick or emergency leave

  Note: The CG-2519 is only required for sick leave in excess of 2 days.

- Compensatory absence in connection with leave

Do NOT use the CG-2519 for Compensatory Absence in conjunction with TDY/PCS orders

The Leave Authorization (CG-2519) must not be used for compensatory absence (CA) in the following instances:

- Periods of CA which are associated with PCS
- Periods of CA in conjunction with TDY orders
- CA, unless such absence is granted consecutively with leave

Continued on next page

Leave Authorization (CG-2519), Continued

Preparation of the CG-2519

The CG-2519 can be typed, prepared using **Adobe Forms**, or handwritten.

Items 1-7 are completed prior to departing.

The space below item 8 is used to indicate if the member used more than one type of absence. Only units outside CONUS need to list regular leave outside CONUS (AO) and regular leave inside CONUS (AI). List types and inclusive date in chronological order.

Follow these procedures for completing the CG-2519.

Item	Description
1	Enter the member's last name, first and middle initials.
2	Enter rate/rank of the member.
3	Enter member's SSN.
4	Enter the unit where the member is assigned.
5	Enter the complete address and phone number.
6	Enter the number of days of authorized absence.
7	DEPARTURE: Enter the time and date absence begins. **Note**: This entry would normally be the time and date normal liberty begins (a day of duty) and the day before the actual first day of leave/absence.
	RETURN: Enter the time and date the absence expires. **Note**: This entry would normally be the time and date the member is expected to be back at the work site/unit (a day of duty) and is the first day after the last day of leave/absence.
	AUTHORIZED OFFICIAL: Sign and date.
8	CHANGE ENDORSEMENT Pen and ink changes to item 7 are NOT allowed. Enter leave date and times if different from those authorized.

Disposition

Forward parts 1 and 2 to the SPO upon member's return from leave. If part 2 was given to the member (e.g., for AMC flight) forward only part 1.

Leave Carried over in Excess of 60 Days

Introduction

Members may be authorized to carry more than sixty (60) days leave into a new fiscal year, if the provisions of Article 7.A.15 of the PERSMAN are met.

Reference

(a) PERSMAN, Article 7.A.15

(b) ALCOAST 387/04

Procedures for carrying over leave of more than 60 days for a member

If a member believes that he/she is qualified to carry over more than 60 days of leave into a fiscal year, then the following steps must occur:

Step	Who Does It	Action Taken
1	MEMBER	Must submit a letter via the chain of command to PSC (MAS) and the letter must contain: • a description of the reason the member was prevented from using leave. • an estimate of the total number of days to be carried into the new fiscal year.
2	UNIT	Endorse the letter and send to PSC (MAS) NLT 1 November.
3	PSC (MAS)	Will accumulate all requests and will process them immediately following the December end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made.

A new request must be submitted by the member if he/she becomes qualified again for additional days to be carried over.

Continued on next page

Leave Carried over in Excess of 60 Days, Continued

Procedures for carrying over of more than 60 days for multiple members at a unit

If multiple members of a unit are qualified to carry over more than 60 days of leave into a fiscal year, then the unit must:

Step	Who Does It	Action Taken
1	UNIT	Must submit a letter to PSC (MAS) and the letter must contain: • A listing of each entitled member of the unit. • An estimate of the total number of days to be carried into the new fiscal year for each member. • And the qualifying circumstances (deployed for Operation XXX, back to back ALPATS, etc..).
2	PSC (MAS)	Will accumulate all requests and will process them immediately following the December end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made.

A new request must be submitted by the unit if a multiple number of members assigned to the unit become qualified again for additional days to be carried over.

Members have 3 years to use carried over leave

Members have 3 years to use any excess leave carried forward. Any such leave will automatically be carried forward until used, or until the three year "window" has closed. The carry-over balance will not be reduced until all of the regular leave accrued for the year has been used. For example:

> A member is authorized to carry forward 65.0 days on 1 October 1996 (5 days out of the 65 days is excess leave carried forward). During fiscal year 1997 this member uses 32 days leave and accrues 30 days leave. This reduces the member's excess leave carry forward balance from the prior year to 3.0 days (the 2.0 days over 30.0 coming off the carry over). On 1 October 1997, Direct Access/JUMPS will automatically carry 63.0 days forward (30 days accrued for fiscal year 1997 plus 33 days carried over from the prior year equals 63 days), since the 3 year window is still open.

Preparation of the DD Form 2 CG and DD Form 2

Introduction

Armed Forces Identification Card DD Form 2 CG and DD Form 2 are used as a means of identifying members on active duty, in the reserve, or in a military retired status. The card will be prepared using data contained on the DD Form 1172.

Use of "RAPIDS" facilities is mandatory for ID Card issuance

On 1 November 1996 the issuance of ID Cards through the Real-Time Automated Personnel identification Card System (RAPIDS) became mandatory. Manual preparation of ID cards is prohibited except in the following circumstances:

- Afloat units may issue DD Form 2 (Active) on a case-by-case basis, when underway and a RAPIDS facility is not available.
- Transition Assistance Management Program (TAMP) beneficiaries and foreign students may be issued DD Form 1173.
- PSC (RAS) may issue DD Form 1173-1.

Availability of RAPIDS facilities

The seven uniformed services have signed a cross-servicing agreement to provide ID card support to all eligible beneficiaries, regardless of their parent service. Once an ID card issuing facility is designated a RAPIDS site, service will be available to any eligible beneficiary.

RAPIDS sites have been established within reasonable distances of most units. Most Coast Guard District, ISC, and Group Offices are designated RAPIDS sites. Most large Department of Defense commands, active and reserve, are designated RAPIDS sites.

The following web site gives the three closest Military ID issuing facilities to a person's zip code, city or state. http://www.dmdc.osd.mil/rsl.

Coast Guard units unable to determine their supporting RAPIDS site should contact COMDT (G-WPM-2) for assistance.

Reference

(a) PERSMAN, Chap. 13-E, Identification Cards and Tags.

Continued on next page

Preparation of the DD Form 2 CG and DD Form 2, Continued

Preparation

Prepare the DD Form 2 CG (Active), DD Form 2 CG (Reserve) and DD Form 2 using a typewriter or the RAPIDS computer equipment. All dates will be in YYYYMMMDD format. Most entries on the card are self-explanatory, there are a few exceptions:

Block	Description
Grade	• For pay grades E-1 to E-3, enter NON PETTY OFFICER. • For pay grades E-4, E-5 or E-6, enter PO3 (E-4), PO2 (E-5), or PO1 (E-6). • For pay grades E-7, E-8 or E-9, enter CPO (E-7), SCPO (E-8), or MCPO (E-9). • For pay grades CWO2 to CWO4 enter CWO (W-2), (W-3), (W-4), as appropriate. • For pay grades O-1 to O-10, enter ENS (O-1), LTJG (O-2), as appropriate. • For Cadets enter CDT. **Note:** Reserve members retired without pay - enter the abbreviation "RET" after member's grade on DD Form 2 CG (Reserve).
Expiration Date	• Active duty enlisted, enter expiration of enlistment. • Cadets, enter expected date of graduation. • Reservist on active duty, enter expiration of active duty. • Reserve enlisted, enter expiration of reserve enlistment. • Reserve member retired without pay, enter 60th birthday. • Officers, enter INDEFINITE. • All Retired members, enter INDEFINITE. • TDRL, see appendix B page 3-2-1.
Signature	Type the full name below the line, member signs in black or blue ink above typed name.

Continued on next page

Preparation of the DD Form 2 CG and DD Form 2, Continued

Preparation (continued)

Block	Description
Social Security No.	Enter 9 digit SSN in format 000000000.
Blood Type	Enter the member's blood type (e.g., B-, O+).
Geneva Convention	See Appendix B, Pg. 5-4 of this manual and enter I, II, etc. as appropriate
Date of Issue	Enter the date of signature by the issuing officer.
Signature of Issuing Officer	Manual ID cards Only enter first name or initial, middle initial, last name, rate/rank, and branch of military service. Signature must be in black or blue ink.
Medical for DD Form 2 (Retired)	See page 16 of Appendix (B) to this manual (paragraph 3.a.(3)).

Photograph (for manually prepared ID cards only)

The size of the photo should be approximately 1 inch by 1 inch. The portrait will have the member's full face and consist of the largest image that will include the member's head and information on a title board before a neutral background. The portrait can be black and white or color. The member will be uncovered. An information board is required for members on active duty who are issued a manually prepared ID card. The information board will contain the following information about the member, each on a separate line below each other.

- Last name
- First name and middle initial
- Social security number

Lamination

Use only polyester, polyethylene coated plastic film, preferably .010 mil. in thickness and thermoplastic laminating equipment.

Personal Clothing and Equipment Record (AF Form 538)

Introduction

The purpose of the Personal Clothing and Equipment Record is to record protective clothing and equipment that has been issued to personnel.

Usage

Unit COs must ensure that all members under their command who have been issued equipment have an up-to-date AF Form 538. It must be used to record:

- Issue date
- Inspection dates
- Modifications and repairs

Preparation

The individual responsible for issuing, monitoring, and accounting for issued items should maintain the form.

Block	Description
National Stock Number and Article	Enter the national stock number (NSN) on the top half of the block and the description of the article on the lower half.
Authorized Allowance	ASC Enter the quantity of the item authorized for issue as listed in COMDTINST M10470.10.
	QNTY Enter the actual quantity of the article issued.
Size	Enter the size of the article.
Issue Date	Enter the date the article was issued. For returnable items enter an R in the number block and an N for non-returnable.
Turn in Date	Enter the date the article was turned in for repairs, modification, or due to transfer. Enter an R in the numbered block corresponding to the turn in date of the article. For non-returnable items, enter NONRETURNABLE across the numbered block.
Balance on Hand	Leave blank.

Continued on next page

Personal Clothing and Equipment Record (AF Form 538),
Continued

Preparation
continued

Block	Description
1 thru 19	Enter the articles following the above instructions
20	Leave blank
21	Leave blank
22	Enter present unit
23	Enter the grade/rate or the member
24	Enter member's SSN
25	Enter the member's work phone number
26	Enter the member's last name, first name, and MI
Signature of Individual	Have the member sign in the block which corresponds to the article(s) issue date
Signature of Sup Rep	Have the supply representative sign in the block which corresponds to the article(s) turned in
Page	Enter the consecutive page number
27	Date and signature will be entered by the individual performing the inventory
28	Leave blank
Validation	Leave blank
Remarks	Use for any explanatory information

Reporting Change in Mailing Address

Introduction

A member's mailing address is shown in block 22 of their LES. This address should be the member's home address and not the unit address. The member's mailing address is used for several purposes, including mailing IRS Form W-2 annually for all personnel, and LESs for reservists as well as members assigned to detached OPFACs.
This table describes how to change your home mailing address using the new Direct Access process. Instructions may also be accessed at the following web site address: http://www.uscg.mil/hq/psc/ps

Members without access to Direct Access

If you do not have access to Direct Access, contact your servicing SPO for instructions.

Step	Action
1	Select menu items in this order: Home > Self Service > Employee > Tasks > Home and Home Mailing Address
2	Enter your mailing address in the ADDRESS 1 field. Do not use fields 2 or 3. **Note:** The home address can be any address you want to enter. The mailing address is where you W-2 form and all correspondence will be mailed.
3	Enter the two-letter state abbreviation code in the STATE field.
4	Choose immediate or enter an effective date for change. If you choose "on this date", enter a future date. You cannot enter a date prior to the date you are entering the information into Direct Access.
5	Click SAVE after verifying the information you have entered.
6	Click OK on the save confirmation page Note: If you selected a future date for the effective date of change there will be a link at the bottom of the Home and Mailing Address page to view, delete, or edit the change.

Employment Verification

Introduction

Requests for employment verification from outside the Coast Guard should be completed at the unit if they have the information requested; if not, forward to the SPO.

Reference

(a) Privacy Act Manual, Encl. (7)

Procedure

All requests for employment verification will be completed as follows:

IF the information is	THEN
Not Privacy Act sensitive,	complete the request.
Privacy Act sensitive,	complete the request, attach a signed statement by the member authorizing release of the information and make the appropriate entry on the Disclosure Log.

E-Resume

Introduction

The E-Resume is necessary to provide up-to-date information to personnel assignment officers regarding an active duty member's personal status and assignment preferences.

Reservists may request reassignment by completing an E-Resume. Forward the completed transaction to the appropriate ISC (fot) via the Commanding Officer.

References

(a) PERSMAN
Articles 4-C.2.a through 4-C-2.f
(b) Commissioned and Warrant Officer Billet Manual
Section A, Officer Billet Code System
Section B, Occupational Field Codes
Section C, Organizational Level Codes
Section D, Job Position Locator Codes
(c) Enlisted Billet Manual, Chapter 4, Tables of General OPFAC Codes & Geographic Areas.

Submission of the E-Resume

The E-Resume must be submitted by active duty personnel as follows:

- To request a specific duty assignment.
- To request a tour extension at current PDS.
- To request mutual or unilateral transfer.
- 6 to 9 months prior to a member's discharge or RELAD date.
- During the "Engage" phase of the S.P.E.A.R. assignment process, for members who will be tour complete in the upcoming fiscal year.

The E-Resume must be submitted by reserve personnel as follows:

- To request transfer to a new unit. The E-Resume shall be submitted to ISC (PF) via the reservist's unit..

Assignment/Termination of Government Quarters

Introduction

When a member moves into or out of government quarters, it normally results in a change in BAH entitlements. This job aid will assist you in notifying the SPO to avoid over/under payments.

The need for prompt SPO notification

Timely input of pay transactions is critical. This is especially true when a pay transaction has a large dollar impact on the member, such as a transaction connected with government quarters occupancy or termination.

- Providing timely notification (within 48 hours) of a change to a member's housing status will enable the SPO to input the required Direct Access/JUMPS transactions and ensure the member receives the correct amount of pay.

In any typical month there are over $40,000 in overpayments to Coast Guard members assigned to government quarters. Although some of the overpayments are caused by normal processing delays (e. g., time between SPO input and the time the next Direct Access/JUMPS update is run), a large majority can be directly attributed to the unit's or the housing officer's failure to notify the member's SPO in a timely fashion.

References

(a) CG Housing Manual,
Section 6-E, Assignment to Public Quarters and Rental Housing
Section 6-F, Termination of Assignment: Public Quarters and Rental Housing

Advance notification will avoid incorrect payments

Members anticipating assignment to government quarters may submit a special request to the SPO to have the BAH stopped ahead of time to avoid being overpaid.

A member desiring to live on the economy must request permission from their commanding officer to be eligible for BAH entitlements.

Continued on next page

Assignment/Termination of Government Quarters, Continued

Notifying the SPO

SPOs, housing offices and unit administrative staffs must work together to develop local procedures for SPO notification. Proper documentation is always required. However, SPOs may accept, at their discretion, telephone notification of housing status changes, as long it will be followed up with "hard copy" documentation with 48 hours.

In the absence of an agreement between housing officials and the servicing SPO, follow these procedures upon notification that a member has been assigned or terminated quarters:

Step	Action
1	Local Housing Officer, Unit administrative staff, or the member notifies the servicing SPO within 48 hours by E-mail or most efficient means. • Provide copy of notification to Area Housing Officer.
2	Ensure notification includes: • Rate/Rank • Name & SSN • Date of assignment/termination • Indicate if spouse is in service • Indicate type of quarters • If inadequate quarters indicate the rental fee
3	Upon receipt of the notification, the SPO will submit the appropriate Direct Access transactions

Permissive Travel Authorization

Introduction

A Permissive travel authorization must be prepared in Basic Coast Guard Letter format. Use of the CG-2519, CG-4251, CG-5131, or authenticated message is not authorized.

Reference

(a) PERSMAN, Chap. 7-A-10

Preparing a Permissive Travel Authorization

A Permissive travel authorization must contain the following:

- Reason for the travel authorization
- Location and inclusive date the member will be absent
- This non-cost statement from the PERSMAN

> "This authorization is issued with the understanding that you will not be entitled to reimbursement for mileage or expense in connection therewith. In case you do not desire to bear this expense, consider this authorization cancelled."

- The member's signature acknowledging understanding of the non-cost statement

Distribution

The unit must give the original travel authorization to the member. Upon return, the member must endorse the travel authorization with the time/date of departure and return. After return and endorsement by member, the original travel authorization must be forwarded to the SPO to complete personnel transactions to credit/debit subsistence entitlements.

Note

Members performing permissive travel for house hunting in the vicinity of their new permanent duty station should consider taking several certified copies of their latest LES.

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator

Introduction

Changes in official Coast Guard records must be made only after an administrative examination has been made of the documentation presented.

Reference

(a) PDR Manual

Policy

- Commands have the authority to approve changes to Names, SSN, Date of Birth and Minority Designator.
- PSC will run a weekly query for changes to: Names, SSN, DOB and Minority Designators. This query will be forwarded to COMDT (ADM-3) for review.

Change of name or correction of date of birth

The member will report/request a name change or a request for correction of date of birth to his/her unit. The report or request must be supported by whichever of the following documents is applicable:

- Copy of marriage certificate.
- Copy of final divorce decree containing provisions for restoration of maiden name.
- Copy of court order authorizing name change
- Naturalization certificate authorizing name change
- Birth certificate registered before first enlistment, if not available, provide one of the following:
- Original or Photostat copy from Family Bible, notarized
- Baptismal certificate
- Original or certified copies of school records
- Census records
- Birth certificate registered subsequent to first enlistment
- Corrected birth certificate with supporting evidence
- Affidavits from officials of business concerns such as banking houses or insurance companies that the individual has in the past carried on business under the desired name.

Upon command authorization the approval will be forwarded to the servicing SPO for Direct Access input.

Continued on next page

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator, Continued

Effective date of name change

Changes in name are effective on the date of command approval.

- If the request is approved, the command will forward a copy of the authorization to the servicing SPO. The SPO will enter changes into Direct Access and make pen & ink changes to the member's PDR and other official documents.

Change of SSN

The member will submit a request for a change/correction to an SSN to his/her unit. The request must be accompanied by a Photostat copy of the social security card.

A change of the social security number in the official records will be made only when authorized by the member's command.

- If the request is approved, the command will forward a copy of the authorization to the servicing SPO. The SPO will enter changes into Direct Access and make pen & ink changes to the member's PDR and other official documents.

Change to Minority Designator

To change a minority designator, members can input the change in Direct Access via Self Service.

TRICARE Selected Reserve Dental Program

Introduction

The TRICARE Selected Reserve Dental Program (TSRDP) is an optional government sponsored insurance plan for eligible reserve members. Family members are not eligible. Enrollment in the plan is not automatic, but requires positive enrollment between the reserve member and the contractor.

This program will be administered by the TRICARE Support Office with dental care provided through a civilian contractor, Humana Military Health Care Services, INC

Selected Reserve members who wish to enroll may call the contractor at 1-800-211-3614.

TSRDP Premiums

There is only one premium rate and it is for selected reserve members only.

Enrollment Requirements

Enrollment into TSRDP is voluntary and is subject to the reserve member being enrolled in DEERS. The reserve must remain enrolled into TSRDP for a minimum of twelve months or be subject to a lockout period of twelve months. The only exception to the twelve-month requirement is if the selected reserve member is called to active duty for greater than 30 days. The twelve-month minimum will not start over for members called to active duty.

Note: The contractor will handle all enrollments (no action is necessary by the SPO). The contractor will collect 4 months of premiums at the time of enrollment. The advance premiums provide a cushion to be used during the period of enrollment due to the lag time involved with collecting enrollee premiums.

Disenrollment requirement

The reserve member may disenroll from TSRDP only after being enrolled for a period of twelve months. After the initial twelve month lock-in period or if enrollee is called to active duty, any unused premiums will be returned to the enrollee upon disenrollment.

Note: Disenrollments are between the reserve member and the contractor.

Continued on next page

TRICARE Selected Reserve Dental Program, Continued

Collection of premiums

The following rules apply:

- The monthly deduction for TSRDP will be withheld from the reserve member's pay if the reserve member receives pay during the month.
- If the reserve member did not receive sufficient pay during the month, the contractor will collect the premium directly from the reserve member.

Note: Failure to make monthly renewal premium payments after being billed by the contractor for months when the reserve member did not receive pay will result in the reservists being disenrolled from the TSRDP and subject to a lock-out period of twelve months.

Termination of TSRDP

TSRDP is terminated on the last day of the month in which the SELRES member is discharged, transferred to the Individual Ready Reserve (IRR), Standby Reserve, Retired Reserve, or SELRES ordered to active duty for a period of more than 30 days.

Effective date of coverage

Coverage usually begins on the first day of the following month of initial enrollment.

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for understanding and executing the policies and procedures of the military pay system. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Notification of Pay	6-A-1
B	Types of Payment	6-B-1
C	Methods of Pay	6-C-1
D	Payment of Inactive Duty Reservists	6-D-1

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Section Overview

Introduction

This section provides you the information needed to understand how the member elects a payment method and the numerous ways the Coast Guard keeps the members informed of their individual pay.

In this section

Topic	See Page
Pay Delivery Method	6-A-2
Leave and Earnings Statement (LES)	6-A-3
Pay Notification for Member assigned to Deployed Cutters or Overseas/Isolated Units	6-A-5

Pay Delivery Method

Introduction

Coast Guard pay customers (active duty, retirees, annuitants, recruits, and reservists are required to have their pay delivered by Direct Deposit/Electronic Fund Transfer (DD/EFT). Direct deposit is the most efficient and reliable method of pay delivery. The possibility of a lost or stolen check is eliminated with use of direct deposit. If a member is on direct deposit and a pay delivery problem occurs, PSC can normally correct the problem and make payment within 48 hours.

Delivery Methods

This table shows the two different options for the election of pay delivery.

Option	Method	Description	Restrictions/Notes
1	Direct Deposit	The member's pay is deposited into their checking or savings account each payday via Electronic Fund Transfer (EFT).	This is the safest and most convenient method of pay delivery.
2	Accrue net at PSC	A member may have their pay held at PSC during PCS or extended leave/TAD periods.	Submit a new election to resume regular pay delivery.

How to select a pay delivery method

Members should use Direct Access to change existing Direct Deposit account information. Alternatively, the member may change the pay delivery method by completing a new CG-PSC 2015, Pay Delivery Worksheet (Enclosure (1) to this manual), and forwarding the completed form to the SPO.

Leave and Earnings Statement (LES)

Introduction

The Leave and Earnings Statement (LES) may be the most important document a member receives and therefore must be well understood by administrative support personnel to assist members when they have questions concerning their pay.

Description

Block-by-block descriptions may be found on the reverse of the LES. A comprehensive description is contained in “You and Your LES”, Appendix (F) of this manual.

Disposition

Leave and Earnings Statement are distributed as follows:

- For active duty members, except members assigned to detached OPFACs, PSC (MAS) mails the Privacy Act copy of the LES to the member’s permanent unit for delivery to the member. If LESs for the entire unit are not received by the fifth day of the following month, notify PSC (MAS) and the SPO. If an LES for one member is not received by the fifth of the following month notify the SPO.
- If a member is transferred before the LES is delivered, the unit from which the member departs forwards the LES to the new unit for delivery to the member.
- For reserve members, and members assigned to detached OPFACs, PSC (MAS) mails the Privacy Act copy of the LES to the member’s mailing address (the address shown in block 22 of the LES). Reserve members not on active duty, or members assigned to detached OPFACs, who do not receive their LES by the fifth day of the following month, should contact their SPO.
- SPO copies of LESs are forwarded by PSC (MAS) to the member’s SPO for review and filing in the SPO PDR. If the member has been transferred, the SPO will forward the SPO copy of the LES to the member’s new servicing SPO. The SPO process for reviewing and validating LES’s is contained in App (F) of this manual.
- An abbreviated LES is available for members by using the Direct Access self-service module.

Continued on Next Page

Leave and Earnings Statement (LES), Continued

Non-Computes

Occasionally, a member's file may not meet the conditions necessary to compute pay. When this occurs, the member will receive an LES for projected pay for the month(s) the member is in a non-compute status. The projected LES will only reflect allotment deductions. When the file is corrected, the member will receive a corrected LES for each month the file was in a non-compute status.

Pay Notification for Members Assigned to Deployed Cutters or Overseas/Isolated Units

Net Pay Advice Message (NPAM)

Cutters and overseas/isolated units may receive mid and end of month pay information via net pay advice message (NPAM).

Requesting NPAMs

Eligible units must submit a one-time request to receive NPAMS.

- Requests for NPAMs may be submitted by message or E-mail to PSC (MAS).

Once the request has been approved, the unit will receive NPAMs on a continuous basis. There is no need to submit a new request prior to each deployment.

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Section Overview

Introduction

This section explains the types of payments available to Coast Guard members and the procedures to request special payments, advances and death gratuity.

In this section

Topic	See Page
Regular Payments	6-B-2
Special Payments	6-B-3
Advance Payments	6-B-6
Death Gratuity Payments	6-B-9
Retired Pay Projection Request	6-B-10

Regular Payments

Introduction

A regular payment is a payment made by JUMPS based on the member's pay account. It is delivered based on the member's payment option election.

Pay periods

Each month is divided into two pay periods. Approximately 10 days before the end of each pay period, PSC computes the payroll based on **Direct Access** transactions.

Description

A regular payment covers the amount of pay and allowances accruing to an account during a semimonthly pay period. This payment also includes routine adjustments to previous pay periods.

Special Payments

Background

In addition to making regular semimonthly payments, PSC has the authority and ability to make certain special payments through the Department of Treasury. Special payments can be authorized in two instances:

Nonreceipt of pay	Member did not receive his/her regular semimonthly payment, or received it but it was lost or stolen.
Significant pay shortage	Member's regular semimonthly payment was significantly less than it should have been, and the member will experience a hardship if he/she must wait until the next scheduled payday to receive the pay due.

Criteria for special payments due to nonreceipt of pay

A member may be authorized a special payment once the ACH (Automated Clearing House) department at the member's financial institution verifies that no payment has been received.

Continued on next page

Special Payments, Continued

Criteria for special payments due to regular semimonthly payment being significantly less than it should have been

A member may be authorized a special payment if he or she meets all of the following 5 criteria:

(1) The member is underpaid $100.00 or more in his/her regular semimonthly payment; and

(2) The pay shortage amounts to 10% or more of the member's total pay entitlements; and

(3) The member is not scheduled to receive the reimbursement of the pay shortage in the next scheduled payday; and

(4) The pay shortage is causing the member to experience a financial hardship; and

(5) The SPO has submitted documentation certifying the member's entitlement to the additional pay due.

How special payments are liquidated & posted on the LES

Special payments are posted as a debit/deduction from the next scheduled pay date. For example, a special payment made to a member on 2 September 2004 will be deducted from the member's 15 September 2004 pay. Special payments made in a mid-month compute cycle will post as a debit/deduction from the mid-month pay. Special payments made in an end-month compute cycle will post as a debit/deduction from the end-month pay.

Nonreceipt of pay procedures

Follow these procedures for claiming nonreceipt of pay.

When member's pay delivery is	Then the ...	Does this...
Direct Deposit	Member	Notifies unit admin office, provides the following: • name and address of financial institution. • name and phone number of person to contact at the financial institution.
	Unit	Notifies SPO.
	SPO	Verifies information and notifies PSC (MAS).
	PSC (MAS)	Makes special payment via EFT if needed within 3 working days.

Continued on next page

Special Payments, Continued

Significant pay shortage procedures

Follow these procedures for requesting a special payment in pay shortage cases:

Note: Special payments for IDT pay discrepancies are generally not authorized but may be considered on a case-by-case basis.

When member's pay delivery is	Then the ...	Does this...
significantly less than it should have been	Member	Notifies unit admin office that a special payment is needed to avoid a financial hardship.
	Unit	Notifies SPO.
	SPO	• Verifies that all pay entitlement transactions have been input into Direct Access. • Relays special payment request to PSC (MAS)
	PSC (MAS)	Makes or authorizes special payment if needed within 3 working days.

Advance Payments

Introduction

This information has been provided to aid in determining what type of advances are allowed, when they may be utilized, and how they will be liquidated.

Reference

(a) PAYMAN, Section 9-D, Advance Payments.

Rules

Payment of advances must be made through Direct Access/JUMPS unless a bona fide emergency exists. Advance Pay may not be paid in cash.

Types of advances

Use this table to choose which advance should be taken.

Types	Normally payable when ...
Pay	• transferring to a new permanent duty station (PDS). • serving on a vessel which has a change of homeport. • ordered to active duty (AD) of 140 days or more.
BAH	authorized for payment of: • advance rent; • security deposits and/or; • initial expenses incident to occupying other than government housing.
OHA, Interim Housing Allowance, and BAH	In conjunction with assignment outside the U.S., is authorized payment of: • advance rent; • security deposits and/or; • initial expenses incident to occupying other than government housing.

Continued on next page

Advance Payments, Continued

Amount payable

Amount requested up to a maximum of three months:
- Advance pay.
- **Advance BAH.**
- Advance OHA, or Interim Housing Allowance, - amount to be advanced will be determined on the basis of housing expenses and the authorized OHA, and interim housing allowance.

Process

This is the process for payment of advances:

Step	Who Does It	Action Taken
1	Member	Submits appropriate worksheet (as listed in enclosure (1) of this manual) to unit • Submits Advances Worksheet, or • Submits PCS Departing Worksheet, if applicable.
2	Unit	Authorizes advance and forwards to SPO.
3	SPO	Completes Advance transactions.

Liquidation

Refer to PAYMAN, Paragraph 9-D-5 for specific liquidation schedules. The Advances Worksheet (CG PSC-2010) provides a general description of the liquidation process.

Continued on next page

Advance Payments, Continued

Changes to liquidation schedules

Use this table to determine action needed to change liquidation schedule.

When Member	Then
requests increase,	monthly amount is increased.
member requests decrease and liquidation period for advance pay will not exceed 24 months. Note: Applicable to liquidation of advance pay only. The liquidation period for advance BAH, OHA, and Interim Housing Allowance is limited to 12 months.	decrease may be authorized by unit commanding officer.
member requests decrease for liquidation of advance OHA or Interim Housing Allowance, and BAH in conjunction with Overseas Assignment	decrease may be authorized by unit commanding officer.
member is separated during liquidation schedule,	ensure a lump sum payment is effected.
member did not use advance for its intended purpose,	ensure a lump sum payment is effected.

Changes in the monthly installment amount being deducted are made by the servicing SPO.

Death Gratuity Payments

Introduction Death gratuity is payable to eligible survivors of Coast Guard members who die while on active duty, Active Duty for Training (ADT) or Inactive Duty for Training (IDT), or while traveling to/from IDT/ADT. The survivors of a member or former member, who dies within 120 days of their separation date, are also authorized a death gratuity, if the Administrator of Veterans Affairs determines the death was service connected. The Death Gratuity is $12,000, and the entire amount is non-taxable.

References
(a) PERSMAN, Article 18-A-4, Death Gratuity
(b) PAYMAN, Section 10-K, Death Gratuity
(c) ALCOAST 563/03

Rules
- PSC (SES) normally pays the Death Gratuity via an EFT, but the beneficiary may request payment by check.
- PSC (SES) records Death Gratuity payment in JUMPS.

Procedures This procedure describes the steps for payment of the Death Gratuity:

Step	Who Does It	Action Taken
1	ISC Decedent Affairs Officer (DAO) or Casualty Assistance Calls Officer (CACO)	• Prepares DD Form 397. • Places the following information in Block 5: o Beneficiary SSN o Indicate whether beneficiary has requested payment by check or EFT. If by EFT, indicate if the EFT will be sent to the member's account as listed in Direct Access/JUMPS or to another account designated by the beneficiary. If not using the same account as listed in Direct Access/JUMPS please provide the bank information via a deposit slip or voided check. • Takes DD Form 397 to beneficiary for signature. • Faxes signed DD Form 397 to PSC (SES) for payment.
2	Beneficiary	• Verifies information on DD Form 397 and signs completed form.
3	PSC (SES)	• Issues payment.

Retired Pay Projection Request

Introduction

The CG PSC-1900 form may be used to obtain an estimated projection of your future retired pay. It is a financial planning service offered by PSC (RAS) to members with over 15 years service who are considering retirement.

Completing the CG PSC-1900

The member should complete the CG PSC-1900 in original only. Instructions for completion of the form are on the reverse side of the form. The bottom of the form is for PSC (RAS) use.

Mail the completed form to:

COMMANDING OFFICER (RAS)
USCG PERSONNEL SERVICE CENTER
444 SE QUINCY STREET
TOPEKA KS 66683-3591

Section Overview

Introduction

This section explains the different payment methods and gives policies, procedures and processes to guide the unit in support of personnel.

In this section

Topic	See Page
Payment of Mobile Unit Personnel	6-C-2
Payment of Recruits	6-C-5
Requesting an Accelerated SRB Payment	6-C-6

Payment of Mobile Unit Personnel

Introduction

This will assist you in providing timely reporting of a member's entitlement, or loss of entitlement, to Career Sea Pay (CSEAPAY), Career Sea Pay Premium (CSEAPAY PREM) and enlisted subsistence entitlements when attached to a mobile unit.

Reference

(a) PAYMAN, Section 4-B, Career Sea Pay.
(b) JFTR, Para U4105-B2, U4125-A3b(2), U4125-A3g, and U4540

What is a Mobile Unit?

Per PAYMAN, Section 4-B-4 a mobile unit is:

- Designated by the Commandant or his designee.
- Identified by individual OPFAC number.
- A unit whose members are not permanently assigned to a specific career sea pay eligible vessel, but who are expected to perform the unit's primary mission under way aboard several different career sea pay eligible vessels.

Payment of Career Sea Pay is based upon the Career Sea Pay eligibility level of the unit. Mobile units as of October 1, 2001 are authorized Level 1 CSP.

Types of Mobile Units

Mobile units include:

- Law Enforcement Detachments (LEDETs)
- Tactical Law Enforcement Teams (TACLETs)
- Atlantic Area Fleet Training Groups (FTGs)
- Pacific Area Fleet Training Groups (FTGs)
- Cutter Support Teams (CSTs)
- Shipboard Aviation Detachments (AVDETs)
- Electronic Support Detachment (ESD) Teams

Continued on next page

Payment of Mobile Unit Personnel, Continued

Career Sea Pay Entitlement

Members assigned to mobile units (other than an administrative capacity) are entitled to *continuous* career sea pay (and career sea pay premium, if otherwise eligible) on the same basis as members assigned to Coast Guard vessels, subject to two conditions:

If the Member is Assigned	Then the Member is
to a mobile unit billet to perform tasks which are administrative in nature, and does not routinely deploy afloat	NOT entitled to continuous career sea pay. **Note**: The member is entitled to career sea pay only when actually deployed. When the member is deployed, the SPO must be notified by the most efficient means available. Include the following information when notifying the SPO of the member's deployment: • Rate/Rank, name, SSN • Effective date/time of deployment. • Estimated length of deployment.
to a mobile unit *and* remains ashore for over 30 days (not including periods of leave).	NOT entitled to continuous career sea pay The member's entitlement to continuous career sea pay stops, and will not restart until the member again gets underway.

Subsistence Allowance for enlisted personnel

When mobile unit personnel are deployed to a vessel with a dining facility:

- If the vessel is a Coast Guard vessel, the member will be charged the Discount Meal Rate for all meals while on the vessel.
- If the vessel is a Navy or foreign vessel, the member will <u>not</u> have a Discount Meal Rate deduction from his/her pay. The member must either:
    1. pay cash for meals; or
    2. the ship will submit a Pay Adjustment Authorization (DD Form139) to PSC (MAS) for recoupment of meal charges.

Per Diem while underway

Members issued TAD orders to a Government vessel are NOT entitled to per diem.

Continued on next page

Payment of Mobile Unit Personnel, Continued

Certifying entitlement

To accomplish payment of continuous CSEAPAY, each member's eligibility must be certified monthly by the appropriate personnel:

- District (ole) staffs.
- Group Commanders.
- CO of the PACAREA TACLET.
- Regional TACLET Commanders.
- Senior CG liaison officer attached to Navy mobile units.

Monthly Roster

A certification roster must be submitted within 3 working days after the first of each month and signed by the CO or Chief of the District Office (ole) staff, to the servicing SPO with the following information:

- Rate/Rank.
- SSN.
- Each member must be annotated that they either remain eligible for CSEAPAY or are ineligible for CSEAPAY effective (date).
- A copy of each member's ride sheet must be attached.

Roster not received by SPO

If the monthly certification roster is not received by the fifth working day after the first of the month, the SPO will submit JUMPS transactions to stop CSEAPAY on all members not certified.

Record keeping

The CO/staff chief signing the certification roster shall retain copies for 3 years and have it available for audit. The servicing SPO will retain the CO's monthly certification roster for 3 years and shall retain a copy of the mobile unit designation and designation removal document(s) for 3 years after removal of the designation for audit.

Payment of Recruits

Introduction

Recruits are accessed in Direct Access/JUMPS upon reporting to TRACEN Cape May, and are required to be on Direct Deposit (pay option 4).

Method of payment

This table describes the payment methods used to pay recruits at various stages of recruit training.

Stage	Description
During training	Depending upon the JUMPS input/cutoff dates, direct deposit payments will be made on the first or second payday after arrival at Cape May. For recruits with dependents who are not paid on the first payday after arrival due to missing cutoff, Cape May shall solicit off-line payment by sending and e-mail request to PSC (MAS).
At separation	Discharged recruits will have their first direct deposit payment made by PSC within 4 working days of notification of discharge.
At graduation	Within 2 working days after graduation, Cape May's Payment Authorization Official (PAO) shall ensure all Direct Access transactions are submitted.
After graduation	JUMPS will continue to generate payments on regularly scheduled paydays for EFT to member's direct deposit account.
Advances	Recruits are entitled to advance pay during their first PCS move. TRACEN Cape May will coordinate their entitlements with PSC (MAS) for inclusion in their last direct deposit payment prior to graduation. If the normally authorized amount of advance ($500) is insufficient to cover anticipated PCS expenses, Cape May will issue additional advance pay in form of traveler's checks.

Requesting an Accelerated SRB Payment

Introduction

An accelerated payment is defined as an early payment of the next SRB installment, prior to the normal anniversary date, but in the same fiscal year in which the installment payment is due.

Reference

(a) PERSMAN, 3.C.8

Process

This is the process.

Stage	Who Does It	What Happens
1	Member	Submits a letter requesting accelerated payment to unit CO.
2	Unit CO	Approves/disapproves request and forwards to PSC (MAS) if approved.
3	PSC	Processes payment within 30 days of receipt. Payment will be in the first regular payday after documents process.

Section Overview

Introduction

This section explains the Inactive Duty Training (IDT) pays system, and gives policies, procedures and processes to guide the unit in support of reserve personnel.

In this section

Topic	See Page
IDT Prerequisites	6-D-2
The IDT Process	6-D-4
Drill Orders	6-D-5
Example of IDT Drill Order Letter (To Unit)	6-D-7
Supervisor Endorsement on IDT Orders	6-D-8
Example of Amendment to IDT Drill Order Letter	6-D-9
IDT Certification Sheet	6-D-10
Waiver of Pension/Disability Compensation or Retired Pay	6-D-11
Annual Reserve Retirement Point Statement	6-D-13
Disability Processing	6-D-15

IDT Prerequisites

Introduction

Before crediting a reservist with pay and/or points for IDT drills certain conditions must be met.

Reference

(a) PAYMAN, sections 12.E.4 & 12.H.2
(b) RPM
(c) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

Drills must be scheduled

- Reservists must be scheduled to attend drills.
- Correspondence necessary to document attendance at drills include endorsed inactive duty drill orders, copies of Standard Travel Order for Military Personnel (CG-5131) for appropriate duty drills, and documentation of actual attendance at the drill (e.g., sign-in sheets, records of muster, endorsement on orders, etc.).

Pay Status For IDT

Only reservists in a training/pay category (e.g. “A, B, C and D”) are authorized payment for IDT drills.

Readiness Management Peirod (RMP)

- ISC (fot) must authorize appropriate RMP with pay.
- The authority for issuing appropriate duty orders without pay may be delegated to unit commanding officers.
- Only reservists in training/pay categories A, B, C, D, E, H, J, and P may be authorized RMP with pay.

Funeral Honors Duty (FHD)

- Unit Commanding Officers may issue FHD orders to Ready Reservists who volunteer to perform funeral honors at the funeral of a veteran.
- Only reservists in training/pay categories A, B, D, E, and H may be authorized FHD with pay.

Continued on next page

IDT Prerequisites, Continued

Compensation

- Reservists performing IDT or RMP, with pay, receive 1/30th of the month rate of basic pay for each single drill/RMP.
- Enlisted reservists may also be eligible for three other types of compensation while performing IDT:
  (a) Enlisted reservists assigned to a PSU receive additional special IDT pay of $10 per drill.
  (b) Enlisted reservists are entitled to Reserve Clothing Maintenance Allowance for each IDT drill performed.
  (c) Enlisted reservists serving on IDT for 8 or more hours in the same calendar day are eligible for commuted rations (COMRATS) when government-provided meals are not available.
- Reservists performing FHD are paid a flat rate of $50.

The IDT Process

Introduction

Inactive duty reservists are paid by the JUMPS system. This section was developed to help guide the field in the IDT processes.

Reference

(a) RPM, Chap. 2
(b) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3
(c) Paperwork Management Manual, COMDTINST M5212.12

The IDT process

Stages of the IDT process.

Stage	Who Does It	What Happens
1	Unit	• Coordinate drill dates and location with member(s). • Prepare and send drill orders to member(s) at least 1 month prior to drill dates.
2	Reservist	• Perform drill(s) as scheduled • Ensure orders are endorsed by supervisor and give to unit ADMIN. • Keep a personal copy of endorsed orders for your records.
3	Unit	• Endorse member's orders verifying that member completed drill(s) as ordered. • Record drill attendance in Direct Access, or forward to servicing SPO for input if necessary
4	SPO	• Verify proper completion of and signature on IDT Certification Sheet(s) or local form. • Complete Direct Access transactions for payment as necessary.
5	PSC	• Process payments

Drill Orders

Introduction

The inactive duty pay cycle starts with the inactive duty drill orders. This section will discuss the rules for drill orders and provide the recommended format of group and individual IDT Drill Orders.

Reference

(a) RPM
(b) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

Rules for Drill Orders

Follow these rules for IDT drill orders:

- Prepare and send drill orders to member(s) at least one month prior to drill dates.
- Only those reservists whose names are on inactive duty drill orders (with pay) and are in a good pay status, or who have been issued **RMP or FHD** orders (with pay), are authorized to receive.
- If a reservist's name is not on the inactive duty drill orders when they are issued, and the reservist is later authorized by the commanding officer to perform duty on the date or dates covered by the orders, a written amendment to the order must be prepared and signed.

Verbal Orders

A reservist may be authorized to attend drills or perform **RMP or FHD** verbally if written authorization cannot be prepared until after the duty has commenced. However, written amendments to the inactive duty drill orders or appropriate duty orders must contain a statement similar to the following: "These orders constitute written confirmation of verbal orders issued by _____ on _____."

Continued on next page

Drill Orders, Continued

Rules for reporting drills

When reporting RMP and FHD drills, you cannot report:

- Two single drills on the same day. (However, you may report a multiple drill with two separate program designator codes.)
- Two multiple drills on the same day
- Two periods of RMP on the same day
- RMP and single drill on the same day
- RMP and multiple drill on the same day
- Two FHD periods on the same day
- FHD and a multiple drill on the same day
- Drills, RMP or FHD while a reservists is on active duty or while in a travel status in conjunction with active duty
- More than 48 paid IDT drills during a Fiscal Year (with an exception being that deployable units such as PSU's are authorized 60 paid drills per Fiscal year)
- More than 30 RMPs during a Fiscal Year

Sample IDT Drill Orders

IDT Drill Orders shall be in writing. As a minimum drill orders must include:

- Identification of the reservist by name
- Dates, beginning/ending times, and duty type (Multiple IDT, Single IDT, RMP, FHD)
- Purpose of duty
- Location where each duty is performed
- Meals authorized enlisted members
- Identification of enlisted members eligible for Special Duty Assignment Pay (SDAP)
- The following pages contain recommended sample orders

Example of IDT Drill Order Letter (To Unit)

U.S. Department of Transportation
United States Coast Guard

Commanding Officer
United States Coast Guard
Unit Name

Unit Address

Phone: ( )
FAX: ( )

1321/1326
Date

MEMORANDUM

From: J. B. Smith
"Unit"

Reply to
Attn of:

To: "Unit Name" Reservists

Subj: MONTHLY INACTIVE DUTY FOR TRAINING (IDT) ORDERS

1. The following members are ordered to report as indicated below to perform IDT:

Member Name	SSN	Drill Dates	Drill Times	Drill Location

2. If emergency or unforeseen circumstances arise and you are unable to perform duty on the time and dates directed, you must notify your supervisor prior to the start of duty.

#

Supervisor Endorsement on IDT Orders

RESERVIST NAME _____ RANK _____ SSN _____

Note: Refer to page 6-D-16 for most commonly used codes. For a complete list of "TYPE, CODE, and MEAL CODES, see COMDTINST 5310 (series)

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE
_____SDAP_____

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE
_____SDAP_____

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE
_____SDAP_____

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE
_____SDAP_____

I certify that the above named reservist completed drills as specified.

_____
Supervisor Signature

_____
Supervisor Name, Rank, (printed)

MEMBER ENDORSEMENT

I certify that I have performed the drill(s) as indicated above.

_____
Members Signature

Note: Ensure this Endorsement On Orders is signed by your supervisor and given to your unit ADMIN office for Direct Access input.

Example of Amendment to IDT Drill Order Letter

U.S. Department of Transportation
United States Coast Guard

Commanding Officer
United States Coast Guard
Unit Name

Unit Address

Phone: ( )
FAX: ( )

1321/1326
Date

MEMORANDUM

From: J. B. Smith
"Unit"

Reply to
Attn of:

To: "Unit Name" Reservists

Subj: AMENDMENT TO DRILL (IDT) ORDERS

Ref: (a) Inactive Duty for Training Drill Orders of _____
(date)

1. Your orders contained in reference (a) are hereby amended to read as indicated below.

Drill Dates Drill Times Drill Location .

1. If you are unable to perform duty on the time and dates directed, you must notify your supervisor no less than 24 hours prior to the start of duty.

#

Encl: (1) Order Endorsements

IDT Certification Sheet This sheet may be used to report drill completions

IDT CERTIFICATION SHEET

Name *(last, first, MI)*:	SSN *(last four only)*	Rank/Rate:
Unit:	Cat Class *(i.e. RQA)*:	Total Paid Drills this FY *(excluding below)*:

INSTRUCTIONS: This Inactive Duty for Training (IDT) Certification Sheet may be utilized to report/record when a member drills "as directed", without their usual group. Once the Certifying Official signs this form immediately deliver it & a copy of the IDT Orders directly to the Direct Access Input Official (Unit or SPO)

Drill Date	Attendance Code	Program Code #1	Program Code #2	SDAP Code	Date of Direct Access Input
1.					
2.					
3.					
4.					
5.					
6.					
7.					

Attendance Codes	Operational Program Codes	Support Program Codes	Cont. & Surge Ops Program Codes
S – Single Drill (w/pay) M – Multiple Drill (w/pay) E – Single Drill (w/o pay) D – Multiple Drill (w/o pay) A – RPM (Appropriate Duty) w/pay N - RPM (Appropriate Duty) w/o pay P – Unexcused absence - Single Q – Unexcused absence – Multiple T - Excused Absence – Training X - Excused Absence – Other F - Single Drill w/pay & a Single Drill w/o pay	AN – Short Range ATON BA – Boating Safety Activities DO – Defense Operations IO – Ice Operations LE – Law Enforcement ME – Environment Protection MI – Merchant Vessel Inspection & Documentation MP – Marine Licensing, Personnel & Casualty Investigations NR - Radio Navigation PS – Port Safety & Security SR – Search & Rescue VT – Vessel Traffic Services	AQ – Acquisition – General AB – Public & International Affairs AC – Contingency Preparedness AD – Research & Development AE – Engineering & Logistics AF – Financial Mgt, Supply & Inventory AT – Structured Training – General AH – Civil Rights – General AI – Security, CMC, Pubs AK – Health Services AL – Legal – General AG – Operational Intelligence AP – Personnel Support AS – Safety & Occupational Health AW – Command, Control & Comms	BC – Boating Safety DC – Defense LC – Law Enforcement LC – Environmental NC – Aids to Navigation PC – Port Safety & Security SC – Search & Rescue GL – Great Lakes – Summer Stock SP – Space Program Support OC – Olympic Games Support 1996

CERTIFYING OFFICIAL SIGNATURE: I certify that this member performed training on the date(s) indicated above. I further certify in accordance with 37 U.S.C. 402(b) that this member received commuted rations while performing Inactive Duty for Training in at least eight hours on the above date(s) and that the above meals were not available to the member either from a government mess or through commercial procurement.

Signature of Certifying Official *(Include Name, Rank and Title)*:	Date:

Waiver of Pension/Disability Compensation or Retired Pay

Introduction

Reservists who, by virtue of prior military service, are receiving compensation such as:

- a pension
- a disability compensation
- a disability allowance
- retired pay

are not entitled to receive military pay and allowances for periods of active duty, active duty for training or inactive duty unless they elect a waiver of VA compensation.

References

(a) PAYMAN, Paragraph 12-B-4
(b) 10 U.S.C. 12316

Form for waiving VA compensation

The Notice of Waiver of VA Compensation or Pension to Receive Military Pay and Allowances (VA Form 21-8951) is used to elect a waiver of VA compensation.

- The VA Form 21-8951 is a onetime waiver of VA compensation and, once completed, remains in effect as long as the reservist is assigned to the ready reserve.

Compensation adjustment

Compensation waived is on the basis of 1 day of compensation for every inactive duty drill and/or for each day of active duty.

- Compensation will be adjusted after the end of each fiscal year.

Continued on next page

Waiver of Pension/Disability Compensation or Retired Pay,
Continued

The waiver process

This is how the process for waiving pension/disability compensation or retired pay works.

Stage	Who does it	What happens
1	Dept. of Veterans Affairs (VA)	Mails a VA Form 21-8951 to active reserve members who, at the end of the fiscal year are receiving VA compensation, and do not have a waiver on file
2	Member	Completes VA Form 21-8951 and forwards to local VA office
3	PSC	Verifies the number of drills and active duty periods the member performed Provides totals to VA
4	VA	Adjusts member's VA compensation

Annual Reserve Retirement Point Statement

Discussion

Annually, each selected reservist is issued an Annual Reserve Retirement Point Statement (CG-4175A). These statements are produced and distributed by PSC **(MAS)** monthly. The monthly run produces a CG-4175A for selected reservists whose anniversary month is three months past. For example, in February 1998, PSC (CSD) issues CG-4175As to all selected reservists whose anniversary month is in November 1997.

Note: PSC **(MAS)** will also mail a copy of the CG-4175A to servicing SPOs at the same time a copy is sent to the selected reservist. SPOs shall review and file the most current year CG-4175A in Section 2 of the SPO PDR.

References

(a) RPM, Section 8.C.10
(b) PDR Manual

Discrepancies on the CG-4175A

- Instructions on the CG-4175A advise the reservist to verify the entries on the CG-4175A. If an entry is incorrect, the reservist is instructed to identify the discrepancy, and:

If	Then
there is any discrepancy:	• A report of discrepancy will be submitted by the member and sent to his/her servicing SPO. • The SPO will take appropriate action to correct the discrepancy. For instance submitting out of range IDT Drills. **Note:** The following supporting documentation should be sent with the request: • Endorsed ADT/IDT orders, • CGHQ-4973A, • CG-4175A, • Correspondence course completion letters, • Any other supporting documentation

Continued on next page

Annual Reserve Retirement Point Statement, Continued

CG-4175A not received by the member

If the member does not receive the CG-4175A or the member is requesting a copy of the CG-4175A, then the member should request a copy from his/her servicing SPO.

CG-4175A not received by the SPO

If a copy of the CG-4175A is not available at the SPO, then the SPO must request a copy from PSC (MAS). The request can be by E-mail and must contain the following information on the member:

- Name
- SSN
- Current mailing address

Note: If member has moved since retiring or separating, please ensure the member's current address is correct in Direct Access.

Disability Processing

Introduction

Disability processing applies to reservists who incur or aggravate an injury, illness, or disease in the line of duty while performing, or traveling to, active duty for 30 days or less or inactive duty training (IDT).

References

(a) RPM Chapter 6A
(b) PAYMAN 12, Reserve Pay and Allowances
(c) Administrative Investigations Manual, COMDTINST M5830.1

Process

Below are the stages of disability processing.

Stage	Who Does It	What Happens
1	Member	Becomes disabled
2	Member/ CO	Ensures a medical exam by proper authorities is completed
3	CO	Issues line-of-duty determination
4	CO	Obtains medical documentation
5	CO	Notifies ISC (pf) via letter of the member's injury. Letter shall include the following information: • Member's full name, rate and SSN; • Duty status (AD, IDT, traveling to or from duty site) at the time injury occurred, and the time and dates of the duty period; • Date, time, place and circumstances of the injury; • Nature of the injury, estimated period of impairment, and anticipated disposition; • If hospitalized, estimated period of impairment, and anticipated disposition; date, time, place, and estimated period of hospitalization along with address of hospital, name of attending physician, and admission diagnosis; • If not hospitalized, name and address of clinic or physician's office where member was treated and when treatment occurred; name of attending physician, diagnosis, physician's prescribed treatment, including follow-up treatment; • Opinion as to whether the injury was incurred in the line of duty; • Complete home and work address and phone number of the member; and • Name and phone number of the member's civilian employment supervisor.

Continued on next page

Disability Processing, Continued

Process (continued)

Stage	Who Does It	What Happens
6	ISC (pf)	Issues Notice of Incapacitation Benefits if the member will not be FFD by the end of the active duty/IDT period
7	ISC (pf)	Coordinated with CO to initiate an Initial Medical Board if treatment will extend beyond 10 weeks
8	ISC (pf)	Coordinates payment of the member with PSC (SES) **Note:** Members are entitled to active duty pay and allowances less any earned income from nonmilitary employment or self-employment.
9	Member	Submits certificates to PSC (SES) every two weeks.
10	ISC (pf)	Terminates Incapacitation Benefits

Certificates

A certificate of claim for compensation and a certificate of physical condition shall support a Notice of Incapacitation Benefits by medical authority. The certificates must be prepared on plain bond paper and attached to the NOE.

Example of certificate of claim for compensation

Information can be found in the RPM, 6-B

Disability processing for reservists on active duty greater than 30 days

When a reservist is injured while on active duty for greater than 30 days, the above procedures do not apply. In this case, the reservist will be continued on active duty until fit for full duty or separated. The commanding officer shall coordinate with ISC (pf) who shall contact the servicing SPO who will provide an extension of the member's active duty orders.

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Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user-friendly job aid for starting and stopping special pay and allowances. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Special Pay	7-A-1
B	Allowances	7-B-1
C	Savings Deposit Program	7-C-1
D	Bonuses	7-D-1

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Section Overview

Introduction

This section provides the information needed to understand how the different kinds of special pay work, who is entitled to them, and how to get members paid.

In this section

Topic	See Page
Aviation Career Incentive Pay (ACIP)	7-A-2
Hazardous Duty Incentive Pay (HDIP)	7-A-3
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	7-A-4
High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)	7-A-5
Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)	7-A-6
Funeral Honors Duty Allowance for Reservists	7-A-8
Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams	7-A-9

Aviation Career Incentive Pay (ACIP)

Introduction Aviation Career Incentive Pay (ACIP) is authorized for rated/designated officers, and officers in flight training. Aviation service information used to establish an aviator's JUMPS record is contained in Chapter 5, CG Pay Manual.

Reference
(a) PAYMAN, Section 5-A, Aviation Career Incentive Pay (ACIP) for Rated/Designated Officers
(b) Flight Pay Instruction

Procedures Follow these procedures to start, stop, suspend, and reinstate ACIP.

If	And	Then
Member becomes first eligible for ACIP	prior aviation service	enclose documentation to substantiate flying time/status and notify SPO to start entitlement
	without prior aviation service	notify SPO to start entitlement
Aviator fails to qualify for continuous ACIP		notify SPO to stop entitlement
	member later qualifies	notify SPO to start entitlement
Reinstating ACIP for aviators with over 25 years aviation service	performing flying duty	notify SPO to start entitlement
	not performing flying duty	JUMPS automatically stops entitlement
Reporting suspension from flight status	affects eligibility for ACIP	notify SPO to stop entitlement
	does not affect eligibility for ACIP	no action taken to stop entitlement
Reporting errors in ACIP	inaccurate information on LES	send letter to PSC (MAS) via SPO. Include supporting documentation from aviation flight record, PDR and/or member's file

Note: USCGR officers ordered to active duty are only entitled to ACIP if the officer is assigned to flight status (DIFOPS).

Hazardous Duty Incentive Pay (HDIP)

Introduction

Members issued flight orders in accordance with the CG Personnel Manual and meeting all requirements of the CG Pay Manual are entitled to Hazardous Duty Incentive Pay (HDIP).

Reference

(a) PAYMAN, Section 5-B, Hazardous Duty Incentive Pay for Enlisted Members and nonrated or nondesignated Officers
(b) PERSMAN
Article 6-A-4, Technical Observers
Article 6-B-4, Flight Orders for Enlisted Personnel
(c) Flight Pay Instruction

How to start HDIP

To start HDIP forward copies of flight orders to the SPO.

When to stop HDIP

To stop HDIP forward a letter to the SPO if one of these situations occur:

- member's order is revoked
- member fails to meet minimum flying time
- member is suspended from flying

Note: HDIP automatically stops on a PCS departure.

Flight Deck Hazardous Duty Incentive Pay (FDHDIP)

Introduction

Flight Deck Hazardous Duty Incentive Pay (FDHDIP) is an entitlement to members assigned to duty involving frequent and regular participation in flight operations on the flight deck of a cutter.

Reference

(a) PAYMAN, Section 5-C, Flight Deck Hazardous Duty Incentive Pay (FDHDIP)

Procedures to start FDHDIP

Use these procedures to start FDHDIP.

Step	Action	
1	Complete letter authorizing payment **Note**: Unit commanding officer must sign authorization	
2	Ensure authorization contains a start and stop date using this criteria:	
	If	**Then**
	the entitlement is for a full month, and the start date will be the first of the month,	the stop date will be the last day of the month.
	the entitlement is for part of the month,	provide the appropriate start and stop dates.
3	Forward authorization to SPO.	

High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)

Introduction

High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP) is an entitlement to qualified Coast Guard Divers serving under Duty Involving Diving Orders (DUID) and who meet the special conditions described in the CG Pay Manual.

Reference

(a) PAYMAN, Section 5-D, High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)

Payments

Payments for HPCHDIP are made on a monthly basis.

- Members must qualify for HPCHDIP on a monthly basis.
- HPCHDIP may be prorated to adjust for issuance or revocation of DUID orders.

Procedure

Each month that the member is qualified for HPCHDIP the unit commanding officer will send a letter to the SPO authorizing payment.

- If the member was not serving under DUID orders for the entire month, indicate the date of issuance or revocation of the DUID orders.

Amount of HDIP

See PAYMAN, Section 5-D, High Pressure Chamber Hazardous Duty Incentive Pay for current rates.

Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)

Introduction

Special pay for Duty Subject to Hostile Fire or Imminent Danger (HF/ID) is an entitlement to members who meet the special conditions described in the CG Pay Manual. This special pay is in addition to any other pay and allowances a member may be entitled.

Reference

(a) PAYMAN, Section 4-H, Special Pay - Duty Subject to Hostile Fire or Imminent Danger

Qualified Areas for HF/ID Pay

Areas designated as qualifying for HF/ID pay are listed in Figure 4-11 of the CG Pay Manual. The listing of qualified areas may be modified, from time to time, via ALCOAST messages.

Rules for HF/ID Pay

The following rules apply when determining entitlement to HF/ID Pay:

- A member who serves on official duty in one of the designated areas for any part of a month is entitled to imminent danger pay for the entire month;
- In those areas where airspace is designated, personnel who fly through the area are eligible for payment if the members are assigned to official temporary duty to the airspace of the combat zone.
- Some members entitled to Imminent Danger Pay may be entitled to Income Tax Exclusion due to their location. Refer to Section 8-G-2 of the CG Pay Manual to verify income tax exclusion locations.

Amount of HF/ID Pay

See PAYMAN, Section 4-H, Special Pay - Duty Subject to Hostile Fire or Imminent Danger for current rates.

Continued on next page

Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID) Continued

Procedure for payment of HF/ID Pay

This is the procedure utilized when a member qualifies for or loses an entitlement to **HF/ID** pay:

Step	Action	
1	The unit commanding officer sends a letter or message to the SPO authorizing **HF/ID**. In addition to the name, rank, SSN and designated **HF/ID** area, include one of these entitlements in the letter:	
	Entitlement	**Description**
	Continuing	If starting, include: • Date the event occurred (e.g., reporting date) • Statement indicating the member is entitled on an ongoing basis. If stopping, include: • Date the event occurred (e.g., departing date) • Statement indicating the exact nature for termination.
	One time	Include: • Date the event occurred (e.g., date member **entered a designated HF/ID area**) • Statement indicating the member is entitled on a one-time basis.
2	The SPO Submits a Direct Access Start Pay transaction for imminent danger pay. There are two options available: Option 1: **HF/ID** pay for a single month only Option 2: Continuous **HF/ID** pay until submission of a subsequent stop transaction.	

Funeral Honors Duty Allowance for Reservists

Introduction

The fiscal year 2000 Legislative Pay Change created an entitlement for Reservists performing funeral honors duty. The entitlement grants the member one retirement point and a daily allowance of $50. This section provides procedures for processing the funeral duty pay and points.

Reference

(a) RPM Chapter 2
(b) PAYMAN, Section 12

Procedures

All members of the Ready Reserve may volunteer to perform funeral honors duty. If the member performs at least two hours of funeral duty, including any associated training and travel, they will be paid through Direct Access as described in Section 6-D of this Manual.

Amount of Funeral Duty Pay for Reservists

See PAYMAN, Section 12-O, Funeral Honors Duty Allowance for the current rate.

Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS)

Introduction

Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS) is an entitlement to members participating in maritime interdiction operations boardings taking place within a designated combat theatre of operations.

Reference

(a) ALCOAST 353/04
(b) ALSPO N/04
(c) Direct Access Online Guide for HDIP-VBSS

Procedures to start HDIP-VBSS

Use these procedures to start HDIP-VBSS.

Step	Action
1	Member completes at least three eligible boarding evolutions in a calendar month. **Notes** Members may not receive concurrent payment of FDHDIP and HDIP-VBSS. Members must be assigned to an authorized HDIP-VBSS eligible billet. See Ref. (a) for additional qualifications.

Continued on next page

Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS), Continued

Procedures to start HDIP-VBSS, Continued

2	Each calendar month that the member is qualified for HDIP-VBSS the unit commanding officer will send a letter, message or e-mail to the SPO authorizing payment. The authorization must include the name, rank, EMPLID, date of boardings and designated HDIP-VBSS areas. Below is a sample format:
	Subj: QUALIFICATION FOR HDIP-VBSS Ref: (a) ALCOAST 353/04 1. I certify that the member listed below has completed three operational HDIP-VBSS boardings during the calendar month of _____. The member is assigned an authorized HDIP-VBSS eligible billet. The following information is provided: Rate/Name: _____ EMPLID: _____ HDIP-VBSS Boarding Dates: Location: _____ _____ _____ _____ _____ _____ 2. Process transaction in Direct Access (earn code VBS) to credit member for one month HDIP-VBSS as per Ref. (a).
	Note: A new authorization is required for each calendar month the member is qualified to receive HDIP-VBSS.
3	Forward authorization to SPO for input into Direct Access.

Section Overview

Introduction

This section will guide you through the procedures for payment of Basic Allowance for Subsistence, Family Separation Allowance, Overseas Housing Allowance, Family Subsistence Supplemental Allowance, and Officer Uniform Allowance.

In this section

Topic	See Page
Refund for Missed Meals – Discounted Meal Rate (DMR)	7-B-2
Family Separation Allowance (FSA)	7-B-3
Overseas Housing Allowances (OHA)	7-B-7
Family Subsistence Supplemental Allowance (FSSA)	7-B-8
Officer Uniform Allowance Claim Worksheet (CG PSC-5100)	7-B-10

Refund for Missed Meals – Discounted Meal Rate (DMR)

Introduction

This section provides procedures for crediting Discount Meal rate charges to a member who is unable to eat meals normally furnished at a government dining facility.

Reference

(a) Direct Access Online Manual

Discounted Meal Rate Credits

This is the procedure utilized for crediting Discount Meal Rate charges to a member who is assigned to a mandatory messing unit and the member's duties, or dining facility exigencies, prevent government furnished meals from being provided.

Step	Action
1	Log meals throughout the month
2	Forward the following information to the SPO at the end of the month: Subj: CERTIFICATION OF MISSED MEALS Ref: (a) CG Pay Manual, Section 3-B, Basic Allowance for Subsistence (BAS - Enlisted) 1. I certify that the member listed below was assigned to a mandatory messing unit and their duties or dining facility exigencies prevented government furnished meals (including box lunches) from being provided as follows: Rate/Name: _____ EMPLID: _____ Date(s) Breakfast Lunch Dinner 2/14/02 x 2/15/02 x 2/18/02 x 2. Process transaction in **Direct Access (earn code RMM)** to credit the member for the missed meals per reference (a).

Family Separation Allowance (FSA)

Introduction

This is provided to assist in the process of starting and stopping Family Separation Allowance (FSA).

Reference

(a) PAYMAN Section **3-G**, Family Separation Allowance (FSA)

Types of FSA

Family Separation Allowance are broken down into three categories:

- FSA-R For personnel transferred to a new permanent duty station where transportation of dependents is not authorized at government expense and the dependents do not relocate to the new duty station (includes members married to members who are separated due to PCS orders).
- FSA-S For personnel permanently assigned to a ship which deployed in excess of 30 days
- FSA-T For TAD assignments, including TAD to a ship which deployed in excess of 30 days.

Eligibility of FSA Entitlement

Members and units should be aware of the rules governing entitlement to FSA. Refer to CG Pay Manual, Section 3-G for detailed information on FSA. The member must understand that he/she is not considered "a member with dependents" for FSA entitlement when:

- The sole dependent is placed in an institution for a known period of over 1 year or for an indefinite period, which may be expected to exceed 1 year.
- The sole dependent is a spouse legally separated or child(ren) in the legal custody of another person.
- The member's dependent parent does not reside in a home, which the member controls, supervises, and maintains for mutual use when circumstances permit (43 Comp Gen 44, 46, and 148).
- For member-married-to-member with no dependents, couple must have resided together immediately before being separated by reason of execution of military orders.

Verification of FSA on the FSA Worksheet

FSA entitlement verification will be completed on the FSA Worksheet (CG PSC-2035).

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-R

Use the following procedures if the member becomes entitled to FSA-R:

Step	Action
1	The member must complete a FSA Worksheet when he/she becomes entitled to FSA-R.
2	The unit will endorse the FSA Worksheet and forward to the SPO. An E-mail may be sent by the unit to the SPO to notify the SPO that this entitlement needs to be started on the member (this will allow the SPO to start the entitlement on the member in a timely manner). However, the unit must still submit the FSA Worksheet to the SPO).
3	Upon Receipt of the FSA Worksheet or E-mail, the SPO will submit a FSA transaction on the member to start FSA-R. **Note:** After the FSA transaction has been submitted, the SPO will ensure that a FSA Worksheet has been received by the unit, if an E-mail was sent by the unit.

Procedures for FSA-S 60 days or less

For ship deployments of 60 days or less, use the following procedures:

Step	Action
1	The unit must ensure that each member that is eligible has completed a FSA Worksheet for FSA-S and the worksheet must have a command endorsement. This worksheet will be kept on file at the unit level (suspense file). • If the current FSA Worksheet on the member is more than 1 year old, a new FSA Worksheet must be completed by the member to re-certify FSA eligibility. • If the current FSA Worksheet on the member is less than 1 year old, then no new FSA Worksheet will have to be completed on the member. **Note:** This removes the requirement of having the member complete a FSA Worksheet every time he/she becomes entitled to FSA-S.
2	Upon return of the ship to homeport, the unit will notify the SPO by message or E-mail with the names and SSNs (last 6 digits) of the members entitled to FSA-S. The start and stop dates of FSA-S must also be included in the message or E-mail (normally the end date will be the day prior to the day returning to homeport).
3	Upon receipt of the message or E-mail, the SPO will submit a single FSA transaction for each member to establish a one time credit of FSA-S.

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-S over 60 days

For ship deployments of over 60 days, use the following procedures:

Step	On the 31st day away from homeport
1	The unit must ensure that each member that is eligible has completed a FSA Worksheet for FSA-S and the worksheet must have a command endorsement. This worksheet will be kept on file at the unit level (suspense file). • If the current FSA Worksheet on the member is more than 1 year old, a new FSA Worksheet must be completed by the member to re-certify FSA eligibility. • If the current FSA Worksheet on the member is less than 1 year old, then no new FSA Worksheet will have to be completed on the member. **Note:** This removes the requirement of having the member complete a FSA Worksheet every time he/she becomes entitled to FSA-S.
2	Unit notifies SPO by message of start date and member's names and SSNs (last six digits) who are entitled to FSA-S.
3	Upon receipt of the message, the SPO will submit a single FSA transaction for each member to establish a start of FSA-S.
	Upon return to homeport
4	Upon return of the ship to homeport, the unit will notify the SPO by message or E-mail with the names and SSNs (last 6 digits) of the members. The date FSA-S ends must also be included in the message or E-mail (normally the end date will be the day prior to the day returning to homeport).
5	Upon receipt of the message or E-mail, the SPO will submit a single FSA transaction for each member to establish a stop of FSA-S.

Procedures for FSA-T 60 days or less

For members who are TAD for 60 days or less, use the following procedures:

Step	Action
1	Upon return to the unit from TAD, the member will complete a FSA Worksheet.
2	The unit will endorse the FSA Worksheet and forward it with a copy of the TAD/TEMDU orders to the SPO.
3	Upon Receipt of the FSA Worksheet and copy of TAD/TEMDU orders, the SPO will submit a FSA transaction on the member to establish a one time credit of FSA-T. **Note:** SPOs should verify FSA entitlement dates when a copy of the travel claim and/or summary sheet is received from PSC (TVL).

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-T over 60 days

For members who are TAD for over 60 days, use the following procedures:

Step	On the 31st day away from unit
1	The member must complete a FSA Worksheet.
2	The TAD unit will endorse the FSA Worksheet and send it with a copy of the TAD/TEMDU orders to the SPO servicing the member.
3	Upon receipt of the FSA Worksheet and copy of the TAD/TEMDU orders, the SPO will submit a single FSA transaction on the member to establish a start of FSA-T.
	Upon return to unit
4	Upon return of TAD, the member will complete a new FSA Worksheet.
5	The unit will endorse the FSA Worksheet and send it with a copy of the TAD/TEMDU orders to the SPO.
6	Upon receipt of the FSA Worksheet and copy of the TAD/TEMDU orders, the SPO will submit a single FSA transaction on the member to establish a stop of FSA-T. Note: SPOs should verify FSA entitlement dates when a copy of the travel claim and/or summary sheet is received by PSC (TVL).

FSA-T entitlements for reserves on active duty

Reservists (with dependents) on active duty greater than 30 days, but less than 140 days, who are stationed away from their home drilling unit, and whose dependents do not accompany them to the active duty site, are entitled to FSA-T.

Overseas Housing Allowance (OHA)

Introduction

This is provided to assist in the process of starting Overseas Housing Allowance (OHA) and requesting Move-In Housing Allowance (MIHA). MIHA provides a one-time payment for move-in costs while stationed in an OHA locale.

Reference

(a) JFTR, Chapter 9
Appendix K, Overseas Housing Allowance
Appendix N, Move-In Housing Allowance

Starting OHA

To start OHA complete the following forms and forward to the SPO with a copy of the lease/purchase agreement:

- Sign an Overseas Housing Allowance Briefing Sheet (found in the JFTR, Appendix K)
- Complete a DD Form 2367

Requesting MIHA

MIHA is requested by completing a CG-2556 and forwarding it to the SPO. A second payment of MIHA may be paid only after approval from Commandant (G-WPM-2).

Family Subsistence Supplemental Allowance (FSSA)

Introduction

This section provides procedures for payment of the Family Subsistence Supplemental Allowance (FSSA).

Reference

(a) PAYMAN, Section 3-N

Definition

FSSA is a voluntary, non-taxable monthly supplemental allowance designed to bring a member's household income to within 130 percent of the Federal poverty line, thereby removing the need for supplement by food stamps.

Background

Payment of FSSA is authorized for Coast Guard and Coast Guard Reserve members on active duty or active duty for training and receiving Basic Allowance for Subsistence (BAS) who would ordinarily be eligible to receive food stamps. Members in recruit training and reservists on inactive duty for training (IDT) are not entitled to FSSA.

Limitations

FSSA is calculated by comparing the member's monthly household income, both military and civilian and from others in the household, to an income limitation figure established by the USDA based on the size of the household.

If the member's total household income is less than the USDA income limit, the member receives the difference between the two figures, or the monthly amount of food stamps the member receives, whichever is greater.

The monthly amount of FSSA may not exceed $500.

Application

Applications for FSSA can be obtained from the following web sites:

- DOD web site: http://www.dmdc.osd.mil/fssa/
- PSC web site: http://www.uscg.mil/hq/psc/forms/ (CG PSC-2075).

Or call PSC Customer Service @ (866) 772-8724. We will fax or mail you a copy of the form and USDA Monthly Income Eligibility Limits.

Continued on next page

Family Subsistence Supplemental Allowance, Continued

Application (continued)

Submission of the FSSA Application can be done by:

Email to mailto:PSC-MAS@PSC.uscg.mil

Fax to (785) 339-3760

Mail to: Commanding Officer (MAS)
Coast Guard PSC
444 SE Quincy
Topeka, KS 66683-3593.

Recertification

FSSA payments are subject to re-certification in the five instances listed below. If the member submits a new FSSA application within 30 days of such an event, and is eligible to FSSA, entitlement to FSSA will be restored the day following the last day of previous certification. If the member does not submit a new application within 30 days, the member's FSSA will be effective the date the FSSA application by 2 March in order to have FSSA restored effective 1 February.

- Annually, during the month of February - PSC will terminate all FSSA payments on 31 January.
- Upon promotion to the next paygrade
- Upon reporting PCS
- When the member's monthly household income increases or decreases by $100 or more
- When there is a decrease in the member's household size
  Note: If during re-certification it is determined the amount of a member's FSSA entitlement will decrease due to an increase in the member's household income, recoupment of FSSA for the previous period of eligibility will not be made so long as the $100 income threshold was not exceeded.

Officer Uniform Allowance Claim Worksheet (CG PSC-5100)

Introduction

The CG PSC-5100 is used to substantiate payment of uniform allowances to Coast Guard regular and reserve officers.

Reference

(a) PAYMAN
Section 3-I, Clothing Allowances for Officers
Section 3-K, Uniform Allowances for Reserve Officers

Procedure

A copy of the CG PSC-5100 can be found at http://www.uscg.mil/hq/psc/forms.

Officers who are appointed:

- Upon graduating from the CG Academy; or
- Upon graduating from OCS; or
- To Warrant Officer from Enlisted status;

Will automatically be paid the appropriate Officer Uniform Allowance by the CG Pay System. A CG PSC 5100 need not be completed, and no Direct Access input should be completed.

If an Officer is entitled to a Uniform Allowance due to:

- Direct Commission; or
- Completion of at least 14 days Active duty as a member of a Reserve component; or
- Completion of 14 periods of Reserve IDT;

Then a CG PSC-5100 claim need completion, following below steps.

Step	Action
1	Enter officer's name, rank, and SSN
2	Enter the date officer became entitled to the allowance
3	Place an "X" in the appropriate claim code block
4	Forward to the SPO

Section Overview

Introduction

This section provides the procedures for the Savings Deposit Program.

In this section

Topic	See Page
Savings Deposit Program	7-C-2

Savings Deposit Program

Introduction

Uniformed Services members assigned outside of the United States, or its possessions, in support of a contingency operation are authorized to make deposits of their unallotted current pay and allowances to the Savings Deposit Program. Members making such deposits earn interest on their deposits at a rate of 10 percent per annum compounded quarterly.

Reference

(a) PAYMAN, Sec 6-F
(b) 10 USC 1035
(c) Department of Defense Financial Management Regulation, Section 5101

Qualified Areas For Savings Deposit Program

- The Secretary of Defense designates areas, which are eligible for the Savings Deposit Program. **These qualifying areas are prescribed in reference (a), section 6.F.2.**

Rules for Savings Deposit Program

The following rules apply to the Savings Deposit Program:

- Members may deposit a maximum of their "unallotted current pay and allowances". This is the amount of net pay (gross pay minus deductions and allotments) to which a member is entitled to receive the month immediately before the date of deposit.
- Deposits must be for a minimum of $5.00.

Continued on next page

Savings Deposit Program, Continued

Rules for Savings Deposit Program (continued)

- The maximum amount on which 10 percent interest is computed is $10,000 (principal and accrued interest combined). Once $10,000 is on deposit, simple interest will be computed on the $10,000.
- Deposits may be made via remittance to PSC (DC), or via allotment.
- Deposits made on or before the 10th of the month accrue interest from the first of the month. Deposits made after the 10th of the month accrue interest from the first day of the following month. The effective date of deposit is the date the deposit is received at PSC.
- Interest is computed at the rate of 10 percent per annum, compounded quarterly, according to calendar quarter. Quarterly interest is computed on the average quarterly balance on deposit.
- A member's eligibility to make deposits into the Savings Deposit Program terminates 90 days after departure from the qualifying area, or when the member is discharged or dies.
- All deposits, plus interest, must be repaid to the member once the member's eligibility for the Savings Deposit Program terminates. The member may request repayment of deposits, plus interest, upon departure from the permanent duty assignment. If the member does not request repayment at this time, repayment will be automatically made 90 days after the permanent duty assignment terminates. Deposits will also be repaid upon the member's discharge or death.
- Members may <u>only</u> withdraw deposits while still assigned to the contingency operation area in an emergency, i.e., when the member's commanding officer determines the health or welfare of a member or his dependents would be jeopardized if the withdrawal were not granted.
- Interest will stop at the end of the month in which repayment is made to the member.
- Once a member's principal and interest on deposit reaches $10,000, any amounts representing interest accruing in the account may be withdrawn quarterly at the member's request.
- Members permanently assigned to a contingency operation area who participate in the Savings Deposit Program may continue to participate while TAD/TDY away from the area for the first 90 days of TAD/TDY, but not after 90 days.

Continued on next page

Savings Deposit Program, Continued

Procedures

Members who elect to participate in the Savings Deposit Program may make their deposits into the program via cash remittance to PSC or via allotment from their pay.

An agent with a power of attorney from the member may make deposits, either by allotment or by cash, into the Savings Deposit Program on behalf of the member, if the power of attorney states the authority to establish, change, or stop allotments.

Members desiring to make deposits by cash remittance shall mail their deposit to PSC. A letter providing the member's name, social security number, and duty station shall accompany deposits. A copy of the letter shall be provided to the member's **SPO**. The member shall make a check or money order payable to U.S. Coast Guard, and mail, along with the cover letter, to:

Commanding Officer (DC)
Coast Guard **PSC**
444 SE Quincy St
Topeka KS 66683-3591

Members desiring to make deposits via allotment shall complete an Allotment Worksheet (CG-PSC-2040). Complete the CG-PSC-2040 as detailed below, **and forward the form to the PSC (MAS) for processing:**

- Complete the top 3 blocks titled Employee ID Number, Name, and Permanent Unit.
- In the Purpose of Request section, check the Start block.
- Blanket Code, enter 850.
- Start Amount, show the monthly deposit amount.
- Month of First Deduction, show the first day of the next month.
- In Allotment Type block, enter D.
- Sign and date the form in the Member's Signature and Date blocks.

Once a member's deposit, plus interest, exceeds $10,000, the member may request that the amounts in excess of $10,000 be withdrawn quarterly and deposited to the member's bank account. Requests of this nature shall be in letter/memo form from the member to PSC (MAS), via the member's commanding officer and **SPO**.

Continued on next page

Savings Deposit Program, Continued

Procedures (continued)

Members departing a contingency operation area will be required to withdraw their funds from the Savings Deposit Program within 90 days of the member's return to the U.S. The member may submit a written request for repayment to PSC (MAS), via the member's commanding officer and Personnel Reporting Unit, upon departure from the overseas duty station. If no letter is received within 90 days of departure from the permanent duty station, PSC (MAS) shall automatically refund the member via electronic funds transfer to the member's bank account.

Members requiring an emergency withdrawal of Savings Deposit funds while stationed in the contingency operation area shall submit a letter request to PSC (MAS) via the member's commanding officer and Personnel Reporting Unit. The request shall provide the reason motivating the withdrawal and the dollar amount of withdrawal requested. Upon receipt of an approved request, PSC (MAS) shall issue refund to member's bank account via electronic funds transfer.

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Section Overview

Introduction

This section will guide you through the guidelines, rules, and procedures for issuing bonuses.

In this section

Topic	See Page
Career Status Bonus (CSB)	7-D-2

Career Status Bonus (CSB)

Introduction

Under the National Defense Authorization Act for Fiscal Year 2000 members who initially entered a uniformed service on or after 1 August 1986 may elect, upon completion of fifteen years of active duty, to receive a $30,000 Career Status Bonus (CSB).

Reference

(a) PAYMAN Section 5-E

CSB Eligibility

To be eligible to elect a CSB, a member must meet ALL of the following four conditions:

1. Be on active duty
2. Complete 15 years of active duty service
3. Have a DIEMS (Date of Initial Entry to Military Service) of 1 August 1986 or later
4. Qualify under Coast Guard regulations for retention to 20 years of active duty service

Rules for election of CSB

Members will be provided an opportunity to elect a CSB six months prior to reaching fifteen years of active creditable service. The decision to elect CSB must be made prior to the 15th anniversary of active duty, with the following exception:

> If notice of eligibility to elect a CSB is not provided six months prior to member's 15th anniversary date, the member will be provided the full six months from the date of notice of eligibility to make election.

CSB elections may not be revoked once they are effective. Elections are considered effective on the date the member has served on active duty for fifteen years. Before that date, the member may withdraw a CSB election.

Continued on next page

Career Status Bonus (CSB), Continued

Continued Service Requirement

Members who elect a CSB must agree to remain on continuous active duty until the completion of 20 years of active duty. If a member fails to complete 20 years of active duty, the member must repay a proportionate share of the CSB.

Waiver of Repayment

Repayment may be waived if it is determined that recovery will be against equity and good conscience or is contrary to the best interest of the United States.

Recoupment shall be waived if the member:

- dies
- is separated or retired due to physical disability
- is separated under an early retirement/separation program

Recoupment will not be waived if the member's separation is due to misconduct.

CSB Payments

PSC shall pay the CSB no earlier than the date the member completes 15 years active service and no later than the first of the third month after 15 years active service.

CSB will be paid as elected by the member, i.e.:

- A single lump sum payment of $30,000
- Two annual payments of $15,000
- Three annual payments of $10,000
- Four annual payments of $7,500
- Five annual payments of $6,000

CSB payments will be less applicable federal and state income tax withholdings.

If a member elects installment payments, the second and later payments will be made in January of each succeeding year.

Taxability of CSB Payments

CSB will be subject to **25%** federal income tax withholding unless:

- The member qualifies for a combat tax exclusion on the date the member reaches 15 years active duty; or
- The member elects to contribute a portion of the CSB to the tax-deferred Thrift Savings Plan (TSP). Under TSP, a member may contribute up to the IRS limit per year into a federal tax-deferred savings plan **($14,000 limit in 2005), 10%** of basic pay salary payments, and 100% of special pay amounts, incentive pay amounts, and bonuses, up to a combined maximum of the IRS limit, may be contributed to TSP.

Continued on next page

Career Status Bonus (CSB), Continued

Effect on Retired Pay and SBP Annuities

Members who elect the CSB are subject to a reduced retired pay multiplier and reduced cost-of-living adjustments (COLA's), with a one-time catch-up at age 62. Payment of a CSB will also result in reduced annuities and premiums under the Survivor Benefit Plan (SBP).

Process

This table describes the CSB election process.

When	Who Does It	What Happens
Six months prior to member's fifteenth active duty anniversary	PSC (MAS)	Sends CSB Election Form, CG PSC-2426 and a Fact Sheet of Information for Eligible Career Status Bonus Members to member's unit
Upon receipt of CSB Election Form (CG PSC-2426)	Command	Reviews and verifies Sections I and II of CG PSC-2426. If member is ineligible to complete twenty years of active service (for disciplinary, medical, or other reasons), the command shall correct block 7 of the CG PSC-2426 and initial beside the correction.
Not later than date member reaches fifteen years active service (or no later than six months after issuance of the CG PSC-2426)	Member	Completes Section III, IV, or V of the CG PSC-2426 to indicate his/her election. The commanding officer or his/her designee shall witness member's signature.
After member signs CG PSC-2426	Command	Distributes form: **1.** Original to PSC (MAS) **2.** Copy to member **3.** Copy to SPO for filing in Section 2: (Career Documentation of the SPO PDR)

Continued on next page

Career Status Bonus (CSB), Continued

Process (continued)

When	Who Does It	What Happens
Not later than the third month after the member completes fifteen years active service	PSC (MAS)	Issues CSB payment to the member.
Each year in January	PSC (MAS)	Issues CSB installment payments as appropriate.
Member retires upon completion of twenty or more years active service	SPO	Sends documents from SPO PDR to CGPC (adm-3) as prescribed in Encl (8) of the PDR Manual. The CG PSC-2426 shall be one of these documents.
	PSC (RAS)	Files copy of CG PSC-2426 in member's retired pay file. Retired pay is calculated per member's election on the CG PSC-2426.
Member separates prior to completion of twenty years active service	PSC (SES)	Recoups CSB as appropriate.

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Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid or starting, stopping, or changing an allotment or bond, claiming non-receipt of an allotment or bond, and changing a member's tax status. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Allotments and Bonds	8-A-1
B	Taxes	8-B-1
C	Thrift Savings Plan (TSP)	8-C-1

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Section Overview

Introduction

This section provides you with the procedures needed to start, stop or change an allotment or bond and for submitting a claim for non-receipt of an allotment or bond.

In this section

Topic	See Page
Allotments and Bonds	8-A-2
Allotment Checklist	8-A-4
Nonreceipt of an Allotment or Bond	8-A-5

Allotments and Bonds

Introduction

The allotment system is a convenience provided to active duty members (or reservists on active duty for 140 days or more) for deductions from their monthly pay. These deductions can be used for savings, loans, insurance, U.S. Savings Bonds, charities, support of dependents, education, CG associated dues, and any other legal purpose. There are times when you need to stop, start, or change an allotment or a bond and this job aid explains the process.

Reference

(a) PAYMAN Section 7, Allotments From Pay
(b) Direct Access Online Manual

Procedures

To change or stop an allotment or a bond:

- Direct member to use Self Service menu of Direct Access to start, stop, or change the following types of allotments and bonds:
  1) CG Association Dues
  2) Contributions to CG Mutual Assistance
  3) Insurance Premiums, including Navy Mutual Aid Insurance
  4) Loan repayment to financial institution (other than, CG Mutual Assistance, American Red Cross, Armed Forces Relief, and government debts)
  5) Personal savings/checking accounts
  6) Series EE. U.S. Saving Bonds
  7) Series I, U.S. Saving Bonds
  8) Support of Dependents

  Have the member read the section on allotments and bonds at http://cgweb.uscg.mil/g-w/psc/Direct-Access/index.htm for instructions on how to start, stop or change allotments bonds in the Direct Access system.

For all other types of allotments/bonds and for members without access to Direct Access:

- Submit an Allotment Worksheet (CG PSC-2040), or a Bond Worksheet (CG PSC-2060), or if starting a CFC allotment, submit the CFC pledge card (provided with CFC fund raising materials) to the SPO,
- Or, make a pen and ink changes to the LES. (See next page).

Continued on next page

Allotments and Bonds, continued

Pen and ink change to the LES

Make the following pen and ink changes to the LES when stopping or changing an allotment or bond.

Step	Action
1	Line out the allotment information affected.
2	Enter the new allotment information in the same block.
3	Sign and date beside the new information.
4	Make a copy for your files.

Disposition

Forward to the SPO.

Allotment Check List

Introduction This checklist provides a job aid to be used when a unit/SPO is completing necessary tasks for starting, changing, or stopping allotments. It is designed to be reproduced locally.

Checklist Standard procedures for allotments.

Step	Item	Applies To	Check Off
1	Allotment must be for an authorized purpose. Refer to Section 7-A, CG PAYMAN or the reverse side of the Allotment Worksheet (CG-PSC-2040) for allotment rules.	Starts	
2	A member is permitted to have only one current allotment of the following types: • Combined Federal Campaign Fund • One education allotment (either Veteran's Education Assistance or Montgomery GI Bill) • MGIB Additional Amount • Loan Repay-CG Mutual Assistance • Navy Mutual Aid Insurance	Starts	
3	A member may have multiple allotments to the same payee provided each allotment has a unique account number.	Starts	
4	Member must have enough projected pay to cover new allotment amount.	Starts Changes	
5	Allotment starts and changes must process in JUMPS prior to mid-month compute; e.g., an allotment start effective 1 June must process in JUMPS prior to mid-month June compute cycle cutoff.	Starts Changes	
6	Allotment stops must process in JUMPS prior to end-month compute of the following month; e.g., an allotment stop effective 30 June must process in JUMPS prior to the July end-month compute cycle.	Stops	
7	Allotments may not be submitted more than two months in advance of desired action.	Starts Changes Stops	

Nonreceipt of an Allotment or Bond

Introduction

This job aid explains the process for reporting nonreceipt of an allotment, or the loss, theft, or destruction of a savings bond.

Reference

(a) PAYMAN Section 7, Allotments from Pay

Procedures

Follow these procedures for claiming nonreceipt of an allotment or savings bond.

When Allotment Type is	Then the....	Does This....

An allotment other than a Savings Bond	Member or Admin unit	• Verifies with financial institution ACH Department that allotment payment has not been received by electronic fund transfer (EFT).
		• Sends an E-Mail message to PSC-MAS with the following information:
		  • member's EMPLID
		  • member's name (last, first, mi)
		  • member's rank
		  • member's unit
		  • member's phone number
		  • date of missing allotment payment
		  • name of financial institution
		  • allotment amount
		  • allotment account number

	PSC (MAS)	Locates original payment or makes special EFT payment, normally within 3 business days

Continued on next page

Nonreceipt of an Allotment or Bond, Continued

Procedures (continued)

<table>
<tr><th>When Allotment Type is</th><th>Then the....</th><th>Does This....</th></tr>
<tr><td rowspan="6">Savings Bond</td><td rowspan="4">Member</td><td>For non-receipt of savings bonds, members must wait 30 days from expected delivery date then:
• Send an E-mail message to PSC (DC) using the E-mail address --“PSC-BONDS” with the following information:
• member’s EMPLID
• member’s name (last, first, mi)
• member’s rank
• member’s unit
• approximate issue date of bond
• face value of bond
• name and SSN of bond owner (if the member is not the owner)
• mailing address of lost bond
• correct mailing address</td></tr>
<tr><td><table><tr><th>If</th><th>Then</th><th>And</th></tr><tr><td>the member does not have access to E-mail</td><td>Complete a Nonreceipt Worksheet, CG PSC-2050 (from Enclosure (1) of this manual)</td><td>Mail to PSC (DC)</td></tr></table></td></tr>
<tr><td>for lost, stolen, or mutilated savings bonds:
• Obtain Bureau of the Public Debt (BPD) Form PD-3062 from any banking institution, or PSC (DC)
• Forward completed PD-3062 to BPD (instructions and address are on the form)</td></tr>
<tr><td>PSC (DC)</td><td>• Verifies bond information and provides Bond serial number
• Forwards appropriate BPD form to member</td></tr>
<tr><td>Member</td><td>Completes form and forwards directly to BPD</td></tr>
</table>

Section Overview

Introduction

This section provides information needed to change federal tax withholding, apply for advance of federal earned income credit, change state tax withholding, or state of legal residence, and report entitlement to Combat Tax Exclusion. This section will also assist you in requesting a duplicate or corrected W-2 form.

In this section

Topic	See Page
Federal Income Tax Withholding	8-B-2
Advance of Federal Earned Income Credit (EIC)	8-B-2
State Income Tax Withholding	8-B-3
Changing State of Legal Residence	8-B-3
State Tax Listing	8-B-4
Income Tax Exclusion for Duty in Combat Zone	8-B-10
Information About the W-2 Form and How to Request a Duplicate or Corrected W-2 Form	8-B-12
Request for Federal or State Tax Adjustments	8-B-15

Federal Income Tax Withholding and Advance EIC

Introduction

Every member is required to file an IRS Form W-4 when a pay account is initially opened. Once the tax withholding is started there are times when it needs to be changed. This provides a job aid in assisting a member who is changing their tax withholding.

Reference

(a) PAYMAN:
Section 8-A, Withholding of Federal Income Tax
Section 8-E, Advance Payment of EIC

Federal Income Tax Withholding

To change federal income tax withholding, the member must:

Step	Action
1	Complete IRS Form W-4
2	If you have access to Direct Access, complete change in Self-Service “W-4 Tax Information” application; otherwise, forward IRS Form W-4 to SPO for completion in “Employee Tax Data” Direct Access application.

Advance of Federal Earned Income Credit (EIC)

To begin receiving or change status for advance EIC, the member must complete an IRS Form W-5 and forward it to the SPO for completion in “Employee Tax Data” Direct Access application.

State Income Tax Withholding and State of Legal Residence

Introduction

Every member, who is a resident of a state authorized to have state income tax withheld from military pay, is required to file the appropriate state tax-withholding document when a pay account is initially opened. Once the tax withholding is started there are times when it may need to be changed. This provides a job aid in assisting a member who is changing their tax withholding.

Reference

(a) PAYMAN Section 8-B, Withholding of State and Local Tax

State Income Tax Withholding

To change state income tax withholding, the member must:

Step	Action
1	Complete the appropriate State tax form (see State Tax Listing beginning on page 8-B-4)
2	If only changing marital status, number of exemptions, or additional amount to be withheld, and have access to Direct Access application, complete change in the Self Service “State Tax Data” application; otherwise, forward to SPO for completion in “Employee Tax Data” Direct Access application.

Changing State of Legal Residence

To change a member’s state of legal residency, submit a DD Form 2058 (CG) to the SPO for completion in “Employee Tax Data” Direct Access. Provide a copy to the member.

State Tax Listing

Introduction

The two charts below provide valuable information to the member on each state concerning withholding requirements, tax forms addresses, phone numbers and internet addresses. The first chart separately lists those states which offer internet addresses and tax forms available on-line for downloading.

State	Internet Address
Alabama	http://www.ador.state.al.us/
Alaska	http://www.revenue.state.ak.us/
Arizona	http://www.revenue.state.az.us/
Arkansas	http://www.state.ar.us/dfa/taxes
California	http://www.ftb.ca.gov/
Colorado	http://www.revenue.state.co.us/
Connecticut	http://www.ct.gov/drs
Delaware	http://www.state.de.us/revenue
D.C.	http://cfo.dc.gov/otr/site/default.asp
Florida	http://www.state.fl.us/dor/
Georgia	http://www.state.ga.us/Departments/DOR/
Hawaii	http://www.state.hi.us/tax/
Idaho	http://tax.idaho.gov/
Illinois	http://www.revenue.state.il.us/
Indiana	http://www.state.in.us/dor/
Iowa	http://www.state.ia.us/tax
Kansas	http://www.ink.org/public/kdor/
Kentucky	http://revenue.ky.gov/
Louisiana	http://www.rev.state.la.us/
Maine	http://www.state.me.us/revenue/homepage.html
Maryland	http://www.comp.state.md.us/
Massachusetts	http://www.state.ma.us/dor
Michigan	http://www.treas.state.mi.us/
Minnesota	http://www.taxes.state.mn.us/
Mississippi	http://www.mstc.state.ms.us/

Continued on next page

State Tax Listing, Continued

Missouri	http://www.dor.state.mo.us/
Montana	http://www.state.mt.us/revenue/
Nebraska	http://www.revenue.state.ne.us/
Nevada	http://www.tax.state.nv.us/
New Hampshire	http://www.state.nh.us/revenue/
New Jersey	http://www.state.nj.us/treasury/taxation/
New Mexico	http://www.state.nm.us/tax/
New York	http://www.tax.state.ny.us/
No. Carolina	http://www.dor.state.nc.us/
No. Dakota	http://www.state.nd.us/taxdpt
Ohio	http://www.state.oh.us/tax/
Oklahoma	http://www.oktax.state.ok.us/
Oregon	http://www.dor.state.or.us/
Pennsylvania	http://www.revenue.state.pa.us/
Rhode Island	http://www.doa.state.ri.us/
So. Carolina	http://www.sctax.org/
So. Dakota	http://www.state.sd.us/drr2/revenue.html
Tennessee	http://www.state.tn.us/revenue
Texas	http://www.window.state.tx.us/
Utah	http://www.tax.utah.gov/
Vermont	http://www.state.vt.us/tax/
Virginia	http://www.state.va.us/
Washington	http://www.dor.wa.gov/
W. Virginia	http://www.state.wv.us/taxdiv
Wisconsin	http://www.dor.state.wi.us/
Wyoming	http://revenue.state.wy.us/

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Alabama (334) 242-1170	Yes	State Form A-4	Alabama Department of Revenue Individual & Corporate Tax Division PO Box 327465 Montgomery, AL 36132-7465
Alaska (907) 465-2300	NO STATE INCOME TAX		
Arizona (602) 255-3381	Yes	State Form A-4 or A-4M	Arizona Department of Revenue Taxpayer Information & Assistance PO Box 29086 Phoenix, AZ 85038-9086
Exemption to state withholding: Legal residents of the state who do not reside in the state may elect not to have state taxes withheld. However, members should be cautioned that this is not an exemption from state taxes, and individuals are required to file returns and remit any taxes owed.			
Arkansas (501) 682-7225	Yes	State Form AR-4EC	Arkansas Department of Finance and Administration Individual Income Tax Section Rm 138, Ledbetter Building Little Rock, AR 72203
California 800-338-0505 (automated) 800-852-5711	Yes	Federal Form W-4 *	California Franchise Tax Board PO Box 942840 Sacramento, CA 94240-0040
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			
Colorado 303-232-2446	Yes	Federal Form W-4 *	Colorado Department of Revenue 1375 Sherman Street Denver, CO 80261
Connecticut 800-382-9463 (in state) (860)297-5962(out of state)	Yes	State Form CT-W4	Taxpayer Services Division Department of Revenue Services 25 Sigourney Street Hartford, CT 06106-5032
Conditions for exemption from state tax: If the member does not maintain a permanent place of abode in the state, AND maintains a permanent place of abode outside the state, AND spends not more that 30 days in the state during the tax year. Members occupying single-type government quarters are NOT considered to be maintaining a permanent place of abode in the state.			
Delaware (302) 577-8200	Yes	Federal Form W-4 *	Delaware Division of Revenue 820 N. French Street Wilmington, DE 19801
District of Columbia (202) 727-4829	Yes	State Form D-4	DC Government Office of Tax & Revenue 941 Capitol St. NE Washington, DC 20002
Florida (850) 922-4827/4826	NO STATE INCOME TAX		
Georgia (404) 656-4188	Yes	State Form G-4	Georgia Department of Revenue 270 Washington St. SW Atlanta, GA 30334
Hawaii 800 222-3229	Yes	State Form HW-4	Hawaii Department of Taxation PO Box 3559 Honolulu, HI 96811-3559

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Idaho (208) 334-7660 800-972-7660 Conditions for exemption from state tax: If member is on active service and is stationed outside the state.	Yes	Federal Form W-4*	Taxpayer Services Idaho State Tax Commission PO Box 36 Boise, ID 83722-0036
Illinois 800-732-8866	No (exempts all active duty military pay)		Illinois Department of Revenue Taxpayer Correspondence PO Box 19044 Springfield, IL 62794-9044
Indiana (317) 232-2240	Yes	State Form WH-4	Indiana Department of Revenue Taxpayer Services Division Indiana Government Center 100 N. Senate Avenue, No. 105 Indianapolis, IN 96811
Iowa 800-367-3388 (in state) (515) 281-3114 (out of state)	Yes	State Form IA-W4	Finance Taxpayer Services and Iowa Department of Revenue PO Box 10457 Des Moines, IA 50306-0457
Kansas (785) 368-8222	Yes	Federal Form W-4 *	Kansas Department of Revenue Taxpayer Assistance Bureau 915 SW Harrison Street Topeka, KS 66625-0001
Kentucky (502) 564-4581	Yes	State Form K-4	Kentucky Revenue Cabinet Taxpayer Assistance 200 Fair Oaks Lane Frankfort, KY 40620
Louisiana (225) 925-4611	Yes	Federal Form W-4 *	Louisiana Department of Revenue PO Box 201 Baton Rouge, LA 70821
Maine (207) 626-8475	Yes	Federal Form W-4 *	Maine Revenue Services Income/Estate Tax Division 24 State House Station Augusta, ME 04333-0024
Maryland (410) 260-7980 (Central MD) 800-638-2937 (Others)	Yes	State Form MW-507	Maryland Taxpayer Service 110 Carroll St Annapolis, MD 21411
Massachusetts (617) 887-6367	Yes	Federal Form W-4 *	Massachusetts Taxpayers Assistance 200 Arlington St Chelsea, MA 02150
Michigan 800-487-7000	No (exempts all active duty military Pay)		Michigan Department of the Treasury Treasury Building Lansing, MI 48922
Minnesota (651) 296-3781 800-652-9094 Conditions for exemption from state tax: If member is on active service and is stationed outside the state.	Yes	Federal Form W-4 *	Minnesota Department of Revenue Individual Income Tax Division Mail Station 5510 St. Paul, MN 55146-5510

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Mississippi (601) 923-7089	Yes	State Form 62-420	Mississippi State Tax Commission PO Box 1033 Jackson, MS 39215-3338
Missouri (573) 751-7191 800-411-8524 Conditions for exemption from state tax: See the rules for Connecticut.	Yes	State Form MO W-4	Taxpayer Services Missouri Department of Revenue PO Box 3300 Jefferson City, MO 65105
Montana (406) 444-6900: Conditions for exemption from state tax	Yes (exempts all active duty military pay) If member performs active duty in the Regular Armed Forces, is legal resident of Montana, and entered into active duty from Montana. However, members serving in Reserve components should have state income taxes withheld. Active duty personnel must file a return even if qualified for an exemption.	Federal Form W-4 *	Montana Department of Revenue PO Box 5805 Helena, MT 59604
Nebraska 800-742-7474	Yes	Federal Form W-4 *	Nebraska Department of Revenue 301 Centennial Mall S. PO Box 94818 Lincoln, NE 68509-4818
Nevada (775) 687-4892	NO STATE INCOME TAX		
New Hampshire (603) 271-2186	NO STATE INCOME TAX		
New Jersey (609) 292-6400 Conditions for exemption from state tax: See the rules for Connecticut.	Yes	Federal Form W-4 *	Division of Taxation PO Box 266 Trenton, NJ 08695-0266
New Mexico (505) 827-0827	Yes	Federal Form W-4 *	Taxation and Revenue Department PO Box 25122 Santa Fe, NM 87504-5122
New York 800-225-5829 Conditions for exemption from state tax: See the rules for Connecticut	Yes	Federal Form W-4 *	Correspondence Unit W.A. Harriman Campus Albany, NY 12227
North Carolina (919) 733-2332	Yes	State Form NC-4	Department of Revenue PO Box 25000 Raleigh, NC 27640-0640
North Dakota 800-638-2901 (In state) (701) 328-3450 (Out of state)	Yes	Federal Form W-4 *	State the Tax Commissioner State Capitol 600 E Boulevard Avenue Bismarck, ND 58505-0599
Ohio 800-282-1780	Yes	State Form IT-4	Taxpayer Services Division 830 Freeway Drive N Columbus, OH 43229
Oklahoma 800-522-8165 (In state) (405) 521-3160	Yes	Federal Form W-4 *	Taxpayer Assistance Division 2501 Lincoln Boulevard Oklahoma City, OK 73194
Oregon 800-356-4222 (In state) (503) 378-4988 (All others) Conditions for exemption from state tax: See rules for Connecticut.	Yes	Federal Form W-4 *	Revenue Building Tax Help, Room 135 955 Center Street NE Salem, OR 97310-2555

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Pennsylvania 888-728-2937	Yes	Federal Form W-4 *	Bureau of Individual Taxes Taxpayer Inquiry Unit 5th Floor, Strawberry Square Harrisburg, PA 17128
Conditions for exemption from state tax: See rules for Connecticut.			
Puerto Rico	Yes (If stationed outside the U.S.)	Form 499R-4.1	Director, Income Tax Division Treasury Department PO Box S-4515 San Juan, PR 00901
Note: Filing of a tax return and payment of personal income tax may be required. It is the member's responsibility to contact the state tax authority to determine tax liability.			
Rhode Island (401) 222-3911	Yes	Federal Form W-4 *	Rhode Island Division of Taxation 1 Capitol Hill Providence, RI 02908
South Carolina (803) 898-5709	Yes	Federal Form W-4 *	South Carolina Department of Revenue PO Box 125 Columbia, SC 29214
South Dakota 800-829-9188	NO STATE INCOME TAX		
Tennessee 800-342-1003 (In state) (615) 741-3506	No (exempts all active duty military pay)		Department of Revenue Jackson State Office Building 500 Deaderick St Nashville, TN 37242
Texas 800-662-4335	NO STATE INCOME TAX		
Utah 800-662-4335	Yes	Federal Form W-4 *	Utah State Tax Commission 210 N 1950 W Salt Lake City, UT 84134
Vermont (802) 828-2865	Yes	Federal Form W-4 *	Vermont Department of Taxes Taxpayer Services Division 109 State Street Montpelier, VT 05609
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			
Virginia (804) 367-8031	Yes	State Form VA-4	Customer Services Section PO Box 1115 Richmond, VA 23218-1115
Washington 800-647-7706	NO STATE INCOME TAX		
West Virginia 800-942-8297 (304) 558-3333	No		Department of Tax & Revenue Taxpayer Services Division PO Box 3784 Charleston, WV 25337-3784
Note: Filing of a tax return and payment of personal income tax may be required. It is the member's responsibility to contact the state tax authority to determine tax liability.			
Wisconsin (608) 266-2772	Yes	Federal Form W-4 *	Wisconsin Department of Revenue PO Box 8903 Madison, WI 53708
Wyoming (307) 777-5200	NO STATE INCOME TAX		

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Income Tax Exclusion for Duty in Combat Zone

Introduction

Certain income earned by members of the Armed Forces while in a combat zone designated by the President is not subject to withholding of federal or state income tax.

Qualified Areas for Combat Tax Exclusion

Section 8-G-2 of the PAYMAN designates combat zones, which qualify for federal income tax exclusion. The listing of qualified areas may be modified from time to time via ALCOAST messages.

Rules for Combat Tax Exclusion

The following rules apply when determining income tax exclusion for duty in a combat zone.

- A member who is present on official duty in a combat zone, no matter how brief, qualifies for combat tax exclusion for that month.
- When the airspace over a combat zone is included as part of the zone, members who pass over or through the combat zone during the course of a trip between two points, both of which lie outside the zone, are entitled to an exclusion. However, this exclusion is valid only if the members are assigned to the airspace of the combat zone on official temporary duty, or if the members qualify for hostile fire/imminent danger pay as a result of the flight.
- Members performing military duties in areas outside a designated combat zone in support of military operations in a combat zone, who qualify for imminent danger pay, also qualify for combat tax exclusion.

Continued on next page

Income Tax Exclusion for Duty in Combat Zone, Continued

Amount of Combat Tax Exclusion

For enlisted members and warrant officers, all taxable military pay items earned by a member during a month while serving in a combat zone are excluded from federal taxation.

For officers O-1 and above, the first $6,090.90 per month of taxable military pay items are excluded from federal taxation.

Note 1: The $6,090.90 figure increases annually to match the current base pay rate for an E-10

Note 2: Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)(if entitled) is not included in the $6,090.90 ceiling.

Members entitled to combat tax exclusion will not have any Federal income tax withheld from the exempted amount of their pay. Voluntary withholding of this amount is not permitted. Check specific state regulations regarding state withholding.

Extension of filing date for tax returns

Members serving in a combat zone are allowed an extension of up to 180 days to file their federal income tax return.

The due date for filing state tax returns is regulated by each state. Members serving in a combat zone should contact their state tax office regarding the postponement of filing state tax returns

Procedures

Notify the servicing SPO, via letter or message, when a member qualifies for or loses entitlement to combat tax exclusion. When starting combat tax exclusion, include a statement indicating the member is entitled on either a:

- Continuous basis (tax exclusion will continue until submission of a subsequent stop transaction) or on a,
- One time basis (tax exclusion for a single month only).

Notification of eligibility for combat tax exclusion will be included with a notification of eligibility for Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID). See page 7-A-6 of this manual for the procedures for reporting entitlement to HF/ID.

Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form

Mailing of IRS Form W-2

IRS Form W-2s are mailed no later than 31 January of each year. To allow for reasonable mailing and forwarding due to address changes, reporting of lost or missing W-2 forms **is after 15 February.**

Ensuring Tax Mailing Address is correct

To furnish the member with a timely IRS Form W-2, the member should:

- Continuously keep his/her home mailing address up to date in Direct Access.
- Notify Post Office if late December, so W-2 can be forwarded.
- Ensure all addresses comply with prescribed postal address standards.

Note: Information about mailing addresses:

- To comply with Postal regulations and to receive mailing discounts, addresses contained in JUMPS are run through a monthly postal standard address conversion program.
- The postal database does not recognize that numerous Coast Guard units may reside at a given address. For instance, in Portsmouth, there are several units located at 4000 Coast Guard Blvd. For single members living in barracks or shipboard berthing, the unit's name may be part of the address.
- To ensure proper delivery, the unit's name must be entered at the BEGINNING of the street information on the Tax Mailing Address transaction and the accurate 9-digit zip code must also be entered.
- If the unit's name is at the end of the street information or as part of the city/town information or the 9-digit zip code was not entered, the unit's name will be deleted by the monthly postal address conversion program.

Example of Good Address: ISC (BEQ) 4000 CG Blvd
Portsmouth, VA 23703-2199

Example of Bad Address: 4000 CG Blvd ISC (BEQ)
Portsmouth, VA 23703-2199

Continued on next page

Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

For members entering the Coast Guard late in the calendar year

If transactions to access a member into Direct Access do not properly process until after the end month compute December polling cutoff, the member will not receive a W-2 for the year member entered the Coast Guard.

For example: A member enlists on 16 December 2003, but was not paid by until 15 January 2004. The member will not receive a W-2 for 2003. The taxable wages earned by the member during calendar year 2003 will be reported on the member's 2004 IRS Form W-2 (as per IRS regulations).

Taxable wages are reported when paid vice when earned

For example, an E-5 serves aboard a Career Sea Pay eligible vessel from 12 to 16 December 2003, but the member does not receive payment for the Career Sea Pay earned in 2003 until 15 January 2004. Per IRS regulations, the taxable income is reported on the IRS Form W-2 for 2004.

General information regarding the IRS Form W-2

General information regarding each block on the IRS Form W-2 can be found on the reverse of "Copy C for Employee's Records". Below is information concerning blocks 13.T, 15 of the IRS Form W-2, continued

Block	Information about the block
13.T	Adoption Assistance Benefits. Qualified adoption expenses paid by the Coast Guard are not subject to federal income tax withholding.
15	• For active duty members, IRS regulations require the "Retirement Plan" block be checked. • For reserve members, the "Retirement Plan" block will only be checked if the member served on active duty, other than for training, for more than 90 days. If the cumulative active service during the calendar year was less than 91 days, the "Retirement Plan" block will not be checked on the reserve member's IRS Form W-2.

Continued on next page

Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

How to request a duplicate IRS Form W-2

To receive a duplicate W-2 form for the previous year, the member must:

Step	Action	
1	Review address on December LES (Block #22).	
	If	**Then**
	correct	the unit submits a request (E-mail, FAX, letter, etc.) to PSC (SES) after 15 February indicating: • lost, destroyed or did not receive. • member's name, and SSN/EMPLID
	incorrect	• contact prior unit/residence and request the W-2 form be forwarded. • **Update current mailing address.**
2	If after 15 February the W-2 has not been located or is lost; the member's unit or SPO submits request (E-mail, FAX, letter, etc..) to PSC (SES) including: • member's name and SSN. • mailing address for duplicate W-2. • reason why block #22 was not updated with current address and action taken to update address or • if W-2 was lost or destroyed indicate "lost".	
3	,PSC (SES) will reissue W-2 within 7 days of receipt of request.	

How to request a corrected IRS Form W-2

Follow the procedures below when questioning a figure reported on the IRS Form W-2:

Stage	Who Does It	What Happens
1	Member	Notifies unit admin office with the following: • Item on W-2 suspected to be in error • What the member thinks is the right amount and why • Calculations
2	Unit	• Review member's calculations and supporting documentation, i.e., LES
3	SPO	• Verify calculations provided by member/unit • Notify PSC (SES) via E-mail and provide calculations.

Request for Federal or State Tax Adjustments

Request for Federal or State Tax Adjustments

It is the member's responsibility to ensure that his/her federal or state tax information is kept current and up-to-date. If through administrative error (i.e., SPO received a tax adjustment request from the member, but failed to act on member's request), a retroactive adjustment may be requested. If there is no administrative error, a retroactive adjustment will not be made.

Example: The state of California permits the member to be exempt from state taxation while on active duty and stationed outside the state. If a member who is stationed in California and is a legal resident of California, transfers PCS to Florida, the member is responsible for ensuring he/she is exempt from state withholding. If the member does not initiate action to change his/her state tax until several months later, the member will not receive the SITW previously withheld. The member will have to collect any overpaid state taxes from the state of California.

If an adjustment needs to be made to the member's FITW or SITW then the member must:

If the Member is	Then
Active Duty, Reserve, or NOAA	A request (i.e., **Memo**, E-mail) for an adjustment must be submitted via the servicing SPO, with supporting documentation (i.e., DD Form 2058), to PSC (SES). **Note:** The request must be received at PSC prior to 10 December of the current tax year. Per IRS regulations, requests for refunds of FITW or SITW for a prior tax year will not be processed. For a prior tax year, the member will have to collect any overpaid FITW or SITW from the IRS or the state.
Retired (or their annuitants)	A request must be submitted to PSC (RAS). **Note:** The request must be received at PSC prior to 10 November of the current tax year. Per IRS regulations, requests for refunds of FITW for a prior tax year will not be processed. For a prior tax year, the member will have to collect any overpaid FITW from the IRS.

Continued on next page

Request for Federal or State Tax Adjustments, Continued

IRS Form W-2c

A statement of Corrected Income and Tax Amounts (IRS Form W-2c) is prepared by PSC (SES) in cases where it becomes necessary to report corrected tax information. PSC (SES) will issue a IRS Form W-2c when the member was qualified for Combat Tax Exclusion for duty in a combat zone.

For example: A member was eligible for Combat Tax Exclusion for the month of October 1997. On 15 February 1998, the member receives the W-2 and becomes aware that the appropriate transactions were not submitted by the SPO for tax exclusion. After the appropriate transactions are submitted by the SPO through JUMPS, PSC (SES) will issue the member an IRS Form W-2c to adjust the member's taxable wages and Earned Income Credit (EIC) (blocks 1 and 13C).

Note: Per IRS regulations, since the tax year has ended, PSC cannot refund the FITW or SITW that was withheld in October 1997. Since the year has ended and all withholdings have been reported and paid to the IRS and/or applicable state, the member will collect any overpaid FITW or SITW when he/she files a return or an amended return.

For the purpose of making adjustments for prior period W-2s, all tax returns are considered to be filed on 15 April of the year after the close of the tax year, and any adjustments to a W-2 may only be made within 3 years of that date.

Section Overview

Introduction

This section will guide you through the guidelines, rules, and procedures for the Thrift Savings Plan.

In this section

Topic	See Page
Thrift Savings Plan (TSP)	8-C-2

Thrift Savings Plan (TSP)

Introduction

TSP is a retirement savings and investment plan that offers a member the same type of savings and tax benefits that many private corporations offer their employees under so-called "401(k) plans." TSP contributions are deducted from a members pay before taxes are computed, so the member pays less tax now. In addition, TSP earnings are tax-deferred. This means the member does not pay federal income taxes on their contributions or earnings until the money is withdrawn.

Participation in TSP is optional and not automatic. All active duty and selected reserve members of the Coast Guard are eligible to join TSP. Coast Guard Academy cadets and non-prior service CG Naval Academy Preparatory School (NAPS) cadets are not eligible to participate in TSP until they are commissioned or reverted to enlisted status.

Reference

(a) PAYMAN Section 6-G, Uniformed Thrift Savings Plan
(b) TSP Web site at http://www.tsp.gov/

Pay that can be contributed to TSP

The only pays/entitlements that can be contributed to TSP are:

Base Pay

Special Pay	Physician's Assistant Board Certification Pay
	Diving Duty Pay (Dive Pay)
	Hardship Duty Pay for Location (HDP-L)
	Career Sea Pay (CSP & CSP-Premium)
	Responsibility Pay
	Special Duty Assignment Pay (SDAP)
	Hostile Fire or Imminent Danger **(HF/ID)**
Incentive Pay	Aviation Career Incentive Pay (ACIP)
	Hazardous Duty Incentive Pay (HDIP), including Crew Member Flight Pay, Noncrew Flight Pay, and Flight Deck Hazardous Duty Incentive Pay
Bonuses	Aviation Career Continuation Pay (ACCP)
	15-Year Career Status Bonus (CSB/REDUX Bonus)
	Enlistment Bonus
	Selective Reenlistment Bonus
	Reserve Enlistment, Reenlistment, and Affiliation Bonuses

Continued on next page

Thrift Savings Plan (TSP), Continued

TSP Contribution Limits and Rules

Basic Pay: A member must contribute a minimum of one percent per pay period (month) into TSP to start an account. The maximum amount a member can contribute from basic pay each year is listed below:

Year	Percent
2002	7%
2003	8%
2004	9%
2005	10%
2006 and after	Unlimited

A member is required to contribute from Basic Pay in order to contribute any special, incentive, or bonus pay into TSP. The minimum special, incentive, or bonus contribution is one percent and the maximum is 100 percent.

Amounts contributed to TSP from basic pay, special pay, incentive pay, and bonus pay are limited by the following IRS contribution limits:

Year	Elective Deferral Amount
2002	$11,000
2003	$12,000
2004	$13,000
2005	$14,000
2006	$15,000

PSC tracks a member's contributions and will stop sending funds to the National Finance Center (NFC) once the contributions reach the IRS limit.

TSP Investment Funds

Members have five investment options:

- Government securities investment (G) fund
- Fixed income index investment (F) fund
- Common stock index investment (C) fund
- U.S. small-capitalization stock index investment (S) fund
- International stock index investment (I) fund

Continued on next page

Thrift Savings Plan (TSP), Continued

Enrollment Periods

Members who join the uniformed service after 9 October 2001 may participate in TSP within 60 days of joining the uniformed services, without waiting for an open season.

A service member who converts from Ready Reserve status to active duty status, or who converts from active duty to Ready Reserve status, may make a TSP contribution election within 60 days after the effective date of the conversion.

Members not joining the program during the initial 60-day period, or within 60 days of enlistment/appointment, will have two "open seasons" per year to enroll thereafter. The two "open seasons" are 15 April through 30 June and 15 October through 31 December.

Procedures for Enrolling

If a member wants to enroll in TSP, Form TSP-U-1 must be filled out. This form can be obtained from the website http://www.tsp.gov/.

Note: Members should not fill out the *TSP-1 election form*. This is the civilian TSP election form and is not to be used by military members.

Step	Who Does It	Action
1	Member	Member will fill out Form TSP-U-1 and either fax the form to PSC (MAS-TSP) at (785) 339-3760, or mail it to the following address: Commanding Officer U.S. Coast Guard PSC (MAS-TSP) 444 SE Quincy St. Topeka, KS 66683-3591 The member should keep a copy of the Form TSP-U-1 for his/her records. **Note:** Members already enrolled in TSP, who simply want to change the percentage of their basic pay contribution during an open season, need not complete Form TSP-U-1. Rather, the member can effect the change through the Direct Access Self-service application.

Continued on next page

Thrift Savings Plan (TSP), Continued

Procedures for Enrolling

Section on procedures for enrolling is continued.

Step	Who Does It	Action
2	PSC (MAS-TSP)	Upon receipt of Form TSP-U-1, will enter the form in Direct Access so that it can be processed in member's pay account in JUMPS. Once this processes in JUMPS, the member will receive a LES Remark reading: "Your TSP Election of __% Base Pay, __% Special Pay, __% Incentive Pay and __% Bonus begins _____." **Note:** If a member sees a TSP error on his/her LES, or on IRS Form W-2, the member should contact the PSC help desk at (785)-339-3540.
3	NFC	Opens the member's TSP account, initially puts the member's contributions into the "G" fund, and sends the member a letter containing account information and TSP personal identification number (PIN). The PIN allows members to access their account balance and execute transactions on the TSP Thriftline and the TSP web site.
4	Member	After receipt of the PIN, the member specifies how he/she wants their TSP contributions to be invested among the five TSP funds. The member can do this by: • Using the tsp web site at http://www.tsp.gov/ • Calling the Thriftline's automated telephone service, at (504) 255-8777. Thriftline is an automated voice response system available 24 hours a day, 7 days a week. • Submitting a form TSP-U-50 to the TSP service office, National Finance Center, P.O. Box 61500, New Orleans, LA 70161-1500.

Continued on next page

Thrift Savings Plan (TSP), Continued

Changing TSP Contributions

Members may change the amount of basic pay, incentive pay, or special pay they are investing in TSP only during an open season. However, a member may change the amount of bonus pay going into TSP at any time. Members may make changes to TSP by submitting Form TSP-U-1 to PSC (MAS-TSP) as detailed in the previous section.

Note: Members have Self-Service access in Direct Access to change their percentage contribution, which they may do once per open season. If they change their mind after making one change during the season, they would need to use form TSP-U-1.

Inter-fund Transfers

A member may change the way money already invested in a TSP account is invested by requesting an interfund transfer, by one of the following means:

- Using the TSP web site http://www.tsp.gov/.
- Calling the Thriftline's automated telephone service at (504) 255-8777.
- Submitting Form TSP-U-50 to the TSP Service Office, National Finance Center, P.O. Box 61500, New Orleans, LA 70161-1500.

Stopping TSP Contributions

A member may stop any or all of their contributions to TSP at any time by sending a completed TSP-U-1 form to PSC (MAS-TSP).

Note: When a member stops basic pay contributions, all other bonus, special or incentive pay contributions are automatically stopped. Stopping special, incentive, or bonus pay contributions does not stop basic pay contributions. If a member stops contributing outside of an open season, the member must wait until the second open season to reenroll in the TSP. If they stop their contributions during an open season, they may reenroll in the TSP during the next open season.

Separation from the service

When separating from the service, the member may:

- Receive a single lump sum payment.
- Transfer all or a portion to an eligible retirement account or plan (IRA).
- Request a series of monthly payments.
- Request a TSP annuity.
- Leave the money in the TSP account where it will continue to accrue earnings (until no later than 1 April following the year the member turns age 70 ½).

Continued on next page

Thrift Savings Plan (TSP), Continued

TSP Loan Program

A member is eligible to obtain a TSP loan while they have a TSP account and are in a pay status. Details are available at http://www.tsp.gov/

TSP Catch-up Program

Members, age 50 and over, are eligible to invest additional amounts in TSP beyond the IRS contribution limits shown on page 8-C-3. The member must be contributing the maximum amount of regular TSP contributions. The TSP Catch-up limits are:

YEAR	LIMIT
2003	$ 2,000
2004	3,000
2005	4,000
2006	5,000
2007 and after	5,000 + Inflation

Members desiring to participate in the TSP Catch-up program shall complete Form TSP-U-1-C, and mail or fax the form to PSC (MAS) reference page 8-C-4.

Matching Contributions

At the present time, the Coast Guard does not make matching contributions to military TSP accounts.

Account Questions

Members should direct any questions about their TSP account to the National Finance Center, New Orleans, LA

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Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for collecting an in-service debt, counseling a member on an overpayment, and requesting a remission or waiver. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Collection	9-A-1
B	Remissions and Waivers	9-B-1

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Section Overview

Introduction

This section provides you with the procedures for collecting an in-service debt and counseling a member on an overpayment.

Cash deposits

If a member desires to repay part of all of an in-service debt, mail a check, made out to U.S. Coast Guard, to PSC (DC) with a copy of the LES or Notice of Overpayment (NOP).

Interest, administrative fees, and penalties

- Interest will be applied to all overpayments that occur earlier than the current JUMPS processing period, and on all non-payroll debts to the Coast Guard unless waived by CO, PSC. No interest will be applied if debt is paid in full prior to the start of collection action. A 30-day notice will be provided to the member with interest being applied from the date of notification.
- Administrative fees and penalties will be applied on a case by case basis in accordance with 4 C.F.R., and the CG Pay Manual.

In this section

Topic	See Page
Collection of JUMPS Overpayments	9-A-2
Collection of Other Debts	9-A-4

Collection of JUMPS Overpayments

Introduction

An overpayment of pay and allowances is the result of errors or delays in processing pay-related transactions. This will assist the unit when counseling a member on an overpayment.

Reference

(a) PAYMAN, CG Pay Manual, Chapter 11, In-Service Debt Collection

How a member is notified of an overpayment

PSC (MAS) will provide a Notice of Overpayment (NOP) letter for each member with a debt of $751 or more. Members with debts of $750 or less will be notified by a message on the LES.

Action upon receipt of a Notice of Overpayment letter

Upon receipt of a Notice of Overpayment (NOP) letter the member's commanding officer shall:

- provide a copy of the NOP letter to the member.
- counsel the member regarding the debt and the collection procedure.

Overpayment collection – Reserves not on active duty

Overpayments to selected reservists (SELRES) will be collected from future drill/ADT/active duty pay earned by the reservist. Collection will be established at two-thirds of the reservist's future available pay. The reservist's commanding officer may propose collection at a lower percentage if collection of two-thirds pay would cause a financial hardship.

Continued on next page

Collection of JUMPS Overpayments, Continued

Overpayment collection process

Use this table when counseling the member on overpayment collection procedures.

Note: The standard procedures described below do not apply if the time remaining before the member's scheduled date of separation is not sufficient to complete collection. Every effort will be made to collect debts prior to separation.

If overpayment is	Then collection will be
less than $150	taken during current month if sufficient net pay exists, with a remark on the LES **Note**: If sufficient net pay does not exist, then the member will be advanced the overpayment amount and collection will start the next month
$150 to $750	scheduled for automatic repayment at a rate not to exceed $150 a month starting the next month with a remark on the LES
$751 to $1999	scheduled in 5 equal monthly installments 30 days after unit CO receives written notice of member's debt
$2000 or greater	scheduled as 1/3 available pay or $400 per month whichever is greater unless: • 1/3 available pay makes repayment less than 5 months, collection will be set at 5 months • repayment exceeds 12 months then repayment rate will be 1/12 of debt, provided it doesn't exceed available pay • 12 equal installments exceed available pay, then repayment will be amount of available pay

Requesting a different repayment schedule

The member's commanding officer may propose a different repayment schedule based upon the member's financial status, as long as repayment is completed prior to separation. Repayment of less than 10% of available pay, or longer than one year will only be approved in cases of legitimate financial hardship. If a financial hardship exists, a Financial Statement, CG-5489B, (from Enclosure (1) to this manual) must be completed and forwarded to PSC (MAS) for review and approval.

Collection of Other Debts

Introduction There are several types of debts that a member may incur that can be collected directly from their pay.

Reference (a) PAYMAN, Chapter 11, In-Service Debt Collection

Types of debts This table lists several types of debts that can be collected from a member's pay.

Type	Who does it	Action taken
Unliquidated Travel Advance	PSC (TVL)	Issues *dunning letter to member
	FINCEN	Initiates collection (Active duty members)
	PSC (DC)	Initiates collection (Reserve members)
IRS Tax Levy	Unit	• Forwards notice of levy to PSC (MAS) • Notifies originating IRS unit that notice of levy has been forwarded
	PSC (MAS)	Initiates collection
Garnishment Involuntary Allotment	Unit	Upon receipt of a court order for garnishment returns order to sender with a letter informing them that the order must be sent directly to PSC (LGL) for action
	PSC (LGL)	Prior to starting an involuntary allotment, PSC (LGL) will forward documentation to both the member and the member's commanding officer, notifying them that automatic processing will occur if a response is not received within 90 days from the date PSC mailed the documentation. Specific procedures to be followed by the member and the command will be included with the documentation provided by PSC.
Private Damages	Unit	Submits the report of investigation to PSC (DC)
	PSC (DC)	Initiates collection

***dunning – "An important demand for payment"**

Continued on next page

Collection of Other Debts, Continued

Type of Debts
(continued)

Type	Who Does It	Action Taken
Bankruptcy	Unit	Forwards notice of bankruptcy to PSC (LGL)
	PSC (LGL)	Initiates collection
Clothing & Small Store Checkage	Unit	The Uniform Distribution Center, Woodbine, NJ, will deduct payment for uniforms purchased through UDC Woodbine from member's pay via JUMPS input. Emergency uniform issuances (e.g., to member's returned from unauthorized absence) are collected from a member's pay via submission of a Pay Adjustment Authorization (PAA), DD Form 139, by the Unit to PSC (DC).
Duplicate Payments	PSC (DC)	Forwards a dunning letter to member
Debts Owed to Coast Guard Mutual Assistance (CGMA)	Unit	Notifies SPO of debts owed to CGMA to be collected from member's available final pay
	SPO	Notifies PSC (SES) and Mutual Assistance Office in Headquarters. The notification must contain: • name, SSN, EMPLID • scheduled date of separation, • CGMA office that processed loan, • loan balance, • blanket code and • whether the member has consented in writing to voluntary collection of the debt, • or if the member has not consented to voluntary checkage, the date on which the member was provided written notice of the debt and planned involuntary collection action
	PSC (SES)	Initiates deduction from separation pay and forwards payment to CGMA

Continued on next page

Collection of Other Debts, Continued

Types of Debts
(continued)

Type	Who Does It	Action Taken
Debts Owed Other Service Relief Society	Other Armed Service	Forwards PAA
	PSC (SES)	Initiates deduction from separation pay
Unpaid DOD Hospital Charges	Care Provider	Forwards statement of charges to PSC (DC)
	PSC (DC)	Initiates collection
Damage to Government Quarters	Housing Officer	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Bad Check/ Defaulted Payment Plan	NAFA/AAFES	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Bad Check to CG	FINCEN	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Tuition Assistance Recoupment	Navy	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Delinquent Government Travel Card	CITIBANK	Forwards PAA to HQ (CFM-3)
	HQ	Reviews and forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Health & Comfort Items	Exchange	Forwards PAA and DD-504 to PSC (DC)
	PSC (DC)	Initiates collection

Section Overview

Introduction

This section will guide you through the procedures for requesting a remission or waiver.

In this section

Topic	See Page
Remissions	9-B-2
Waivers	9-B-3

Remissions

Introduction

To cancel an uncollected amount of indebtedness to the U.S. Government, a member must request a remission of that debt. This will assist you with requesting a remission. Waiver/Remission application forms are located in Enclosure (1) to this manual.

References

(a) PAYMAN, Section 11-G, Remission of Indebtedness for Enlisted Members

Who can apply

Any enlisted member on active duty, including a temporary officer holding a permanent enlisted status, can request a remission.

Note to deploying or deployed units

If on a cutter 210' or larger, preparing to deploy or deployed when a member receives a notice of overpayment the unit may request suspension of collection action by notifying PSC (MAS) and your SPO, indicating date application is to be forwarded (must be submitted within 60 days).

Applying for a remission

Use this table when completing an application for a remission.

Stage	Who Does It	What Happens	Action to be Taken
1	Member	• Completes Part I, CG-5489 • Completes CG-5489B, (if a financial hardship exists)	Within 15 days of receipt of notice of overpayment
2	CO of Unit	• Completes Part II, CG-5489 • Completes Part II, CG-5489B	Within 5 working days of receipt of CG-5489 from member
3	SPO	• Completes SPO Endorsement, CG-5489A	Within 5 working days of receipt of CG-5489 from Unit
4	PSC (MAS)	• Suspends collection of indebtedness • Forwards application and endorsements to COMDT (G-WPM) • Notifies member of action taken	Within 3 working days of receipt of CG-5489 from SPO

Waivers

Introduction

An erroneous payment to a member is subject to collection when detected. A member may request cancellation of this debt by submitting a request for waiver. This will assist you with requesting a waiver. Waiver/Remission application forms are located in Enclosure (1) to this manual.

References

(a) PAYMAN, Section 11-F, Waiver of Claims for Erroneous Payment

Who can apply

Any present or former member of the U.S. Coast Guard and recipients of pay and/or allowances on behalf of members or former members may apply for a waiver of a debt. Applications must be received by the unit commanding officer, PSC, or the Comptroller General of the United States within 3 years following the date of discovery of the erroneous payment.

Applying for a waiver

Members on active duty or serving in the selected reserve must use this procedure when submitting an application for a waiver.

Step	Who Does It	What Happens	Action to be Taken
1	Member	• Completes Part I, CG-5489	Within 15 days of receipt of notice of overpayment
2	CO of Unit	• Completes Part II, CG-5489	Within 5 working days of receipt of CG-5489 from member
3	SPO	• Completes SPO Endorsement	Within 5 working days of receipt of CG-5489 from Unit
4	PSC (MAS/PPS)	• Forwards application and endorsements to COMDT (G-WPM) • Notifies member of action taken	Within 3 working days of receipt of CG-5489 from SPO

Note: Former members of the U.S. Coast Guard, and recipients of pay and/or allowances on behalf of a member or a former member should contact PSC (DC) for information on waiver requests.

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Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for completing administrative remarks, recording medals and awards, reporting completion of NJP or courts-martial proceedings, reporting unauthorized absence or deserter status and reporting return from unauthorized absence or deserter status. This chapter provides checklist, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Performance	10-A-1
B	Discipline	10-B-1

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Section Overview

Introduction

This section will help you to locate the policies and procedures for completing an administrative remark entry, guide you through the procedures for reporting medals and awards, and aid you in completing and reviewing an Enlisted Employee Review Worksheet (EERW).

In this section

Topic	See Page
Administrative Remarks (CG-3307)	10-A-2
Reporting Medals and Awards	10-A-3
How to Complete Enlisted Employee Review Worksheet for Units Without Access to Direct Access	10-A-4
Administrative Review of the Enlisted Employee Review Worksheet	10-A-9

Administrative Remarks (CG-3307)

Introduction

The CG-3307 provides a means of recording miscellaneous entries, which are not recorded elsewhere in a Personnel Data Record (PDR). Administrative Remarks entries are made, to document counseling, or to record any other information required by current directives, or considered to be of historical value.

Reference

(a) COMDINST 1000.14(series)

Policies and procedures

- The only authorized CG-3307 entries are those listed in Enclosure (6) to this manual.
- The policies governing the use of the CG-3307 can be found in Ref. (a).

Example entries

See Enclosure (6) of this manual for examples.

Reporting Medals and Awards

Introduction

All medals and awards that have been presented to the member must be reported to the SPO for entry into Direct Access.

Reporting awards

When a member receives a medal or award, forward a copy of the certificate or other documentation to the Direct Access input office (SPO or Unit).

Processing Good Conduct Awards

Process table for active duty and reserve Good Conduct Awards.

Stage	Who Does It	What Happens
1	SPO	Forwards a list to the unit of members who are eligible for awards between the 15th of the current month to the 14th of the next month
2	Unit/SPO (See note)	Prepares Good Conduct Award Certificate for the unit commanding officer's signature
3	Unit	Completes Direct Access transaction or forwards a copy of the signed award certificate or documentation to SPO for Direct Access input
4	SPO	Completes Direct Access transaction if unit is unable to enter the data

Note: If unit has no administrative support attached, the SPO will complete the Good Conduct Award Certificate and forward to the unit.

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access

Purpose

The objective of this section is to provide a concise, user-friendly job aid for completing Enlisted Employee Review Worksheet (EERW). Refer to Chapter 10-B of the PERSMAN, for information about the Enlisted Employee Review System.

Discussion

The EERW should only be used for personnel assigned to commands without access to Direct Access. Some examples of affected commands are:

- CG Recruiting Offices
- CG personnel assigned at MEPS
- Underway vessels (to be input upon return to homeport)
- Detached duty.

Direct Access does not allow input of Employee Reviews older than one year. In that case the unit must submit the completed EERW and forward to PSC (adv) for processing.

Process

This is the process used for submission of Enlisted Employee Review Worksheets.

Stage	Who Does It	What Happens
1	Unit	• Determines members that need to be evaluated. • Obtains the EERW from parent command, Enclosure 1 of this manual, or the internet (if applicable). Vessels anticipating underway periods during a period ending date should have sufficient copies prior to sailing. • Ensures member signs EERW within 21 days of period ending date. • Mails completed EERW to parent command for data entry into EERS.
2	SPO	• Enters information from EERW into Direct Access. • Prints Enlisted Employee Review Summary (EERS) from Direct Access • Returns counseling sheet to Unit.
3	Unit	• **Verifies EERS for accuracy**, counsels member, gets signature, and files summary sheet in member's record.

Continued on next page

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

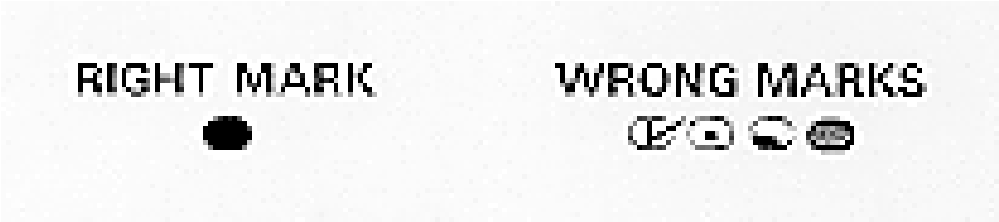
Before you begin

EERW's must be used for all Enlisted Employee Reviews (EER) submitted with a period end date later than 1AUG02 when applicable. All EER's must be submitted online.

A properly completed EERW is required for entry by parent command. Incorrect forms will be sent back to the unit for corrections.

Keep these important rules in mind while completing EERW's.

- Use a pen or pencil
- Darken the ovals completely, as in this example:



Continued on next page

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

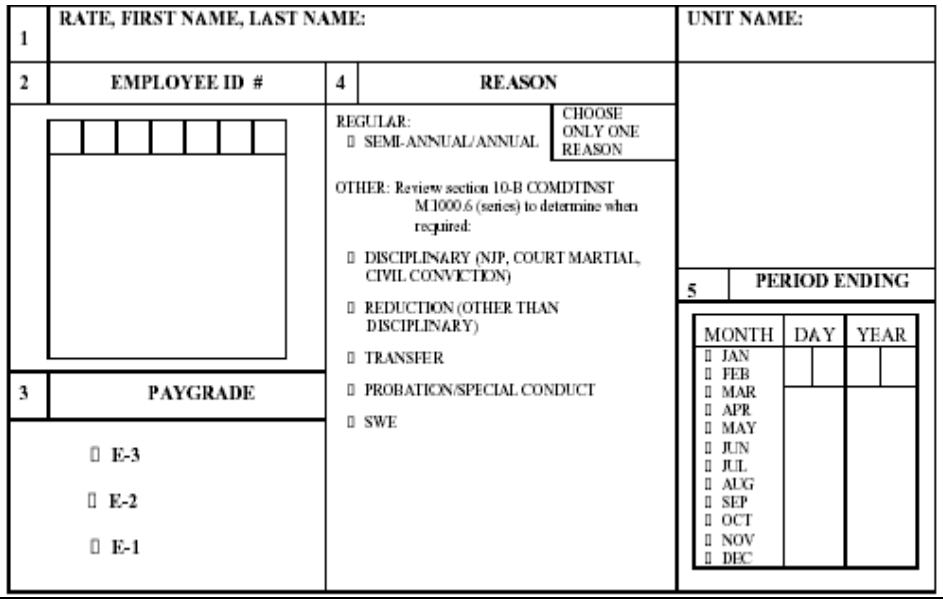
Completing the EERW

Follow these steps and examples to complete the EERW.

Note: If you have any questions after reading these directions, please contact PSC (ADV) at 785-339-3400 for assistance, before attempting to complete the form.

Step	Action
1	Determine the reason for evaluation.
2	Please darken the correct ovals in blocks 1-5.

Block	Enter
1	Print member's full name/rate and unit
2	Enter member's Employee Id
3	Darken the oval for the appropriate pay grade
4	Enter the correct reason code for the evaluation
5	Enter the correct period ending date



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How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

Completing the EERW (cont'd)

Step	Action
3	Darken the ovals that properly evaluate the member. • Use only one mark per field. • The supervisor and marking official should use a pencil and enter a mark in the oval, which can be erased if necessary. • The approving official agrees/disagrees and darkens the appropriate oval.
4	All marks of: • 1; • 2; • 7; • Not Recommended; or • Unsatisfactory in Conduct must have supporting documentation attached to the EERW.
5	LEADERSHIP POTENTIAL Provide written documentation for all personnel E-6 and above describing in detail their potential for future leadership responsibilities.
6	Darken the correct Conduct oval. **CONDUCT** COMPETENCY CONDUCT The degree to which this member, through personal behavior, conformed to the rules, regulations, and military standards, on and off duty. UNSATISFACTORY ◯ Failed to meet minimum standards as evidenced by NJP, CM, or civil conviction; or brought discredit to the Coast Guard as evidenced by adverse CG-3307 entries including financial irresponsibility, non-support of dependents, or alcohol incidents; or failed to conform to civilian and military rules, regulations, and standards. SATISFACTORY ◯ No NJP, CM, or civil conviction; and promoted and supported respect for rules, regulations, and civilian and military standards as evidenced by no adverse CG-3307 entries. A mark of unsatisfactory requires adverse supporting documentation.

Continued on next page

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

Completing the EERW (cont'd)

Step	Action
7	The supervisor, marking official and approving official must darken in one oval for a mark of not recommended or recommended. SUPERVISOR: ▯ Not Recommended ▯ Recommended MARKING OFFICIAL: ▯ Not Recommended ▯ Recommended APPROVING OFFICIAL: ▯ Not Recommended ▯ Recommended • All members marked not recommended will not receive a SWE nor be allowed placement on a supplemental advancement or striker list. • All evaluations completed in the spring are for the November SWE cycle. • Evaluations completed in the fall are for the May SWE cycle. • Reservists are evaluated one time per year in May for the October RSWE cycle.
8	The EERW must have four signatures for processing. 1. The supervisor 2. Marking official 3. Approving official 4. Member SUPERVISOR: ▯ Not Recommended ▯ Recommended — I CERTIFY THAT I HAVE EVALUATED THIS MEMBER AGAINST THE WRITTEN PERFORMANCE STANDARDS AND HAVE PROVIDED WRITTEN DOCUMENTATION FOR SUPPORT OF EACH MARK OF 1, 2, 7, OR UNSATISFACTORY CONDUCT AND TERMINATION OF GOOD CONDUCT ELIGIBILITY. Signature Rate/Rank Date MARKING OFFICIAL: ▯ Not Recommended ▯ Recommended — I CERTIFY THAT I HAVE EVALUATED THIS MEMBER AGAINST THE WRITTEN PERFORMANCE STANDARDS AND HAVE PROVIDED WRITTEN DOCUMENTATION FOR SUPPORT OF EACH MARK OF 1, 2, 7, OR UNSATISFACTORY CONDUCT AND TERMINATION OF GOOD CONDUCT ELIGIBILITY. Signature Rate/Rank Date APPROVING OFFICIAL: ▯ Not Recommended ▯ Recommended — ▯ Concur ▯ Do not concur, changes made ▯ Counseling/ Documentation for 1, 2, and 7's required ▯ Counseling required (specify areas) Signature Rate/Rank Date MEMBER: I ACKNOWLEDGE HAVING BEEN COUNSELED ON AND HAVE REVIEWED MY ENLISTED PERFORMANCE FORM FOR THIS PERIOD. I HAVE BEEN BRIEFED ON AND FULLY UNDERSTAND THE SIGNIFICANCE THAT THE ASSIGNED MARKS HAVE ON MY GOOD CONDUCT ELIGIBILITY. I UNDERSTAND THAT I HAVE 15 CALENDAR DAYS IN WHICH TO SUBMIT A MARKS APPEAL. I HAVE BEEN BRIEFED ON AND FULLY UNDERSTAND THE ACTION TAKEN ON MY ADVANCEMENT POTENTIAL. Signature Date

Continued on next page

Administrative Review of the Enlisted Employee Review Worksheet

Introduction

Everyone involved in the enlisted evaluation process has a responsibility to ensure the form is properly completed. An audit of the worksheet will ensure it is processed properly the first time.

Remember the critical nature of the EERW demands that members, commands, parent commands, and processing points adhere strictly to these guidelines to provide the best service to the member being evaluated.

Reasons the EERW rejects

Listed below are several reasons the EERW will be rejected by your parent command. Pay special attention to these areas during your review of each worksheet.

1. Wrong period ending date/wrong evaluation reason.
2. Too many marks in field -- Occurs when the rating chain properly changes a factor mark but fails to erase the original mark completely.
3. No marks in field -- One oval per factor must be darkened.
4. Need supporting documentation.
5. Pay grade does not match -- The unit marks the member for semi-annual evaluation when in fact the member advanced at an earlier date.
6. No signature -- The supervisor, marking official, approving official, and the member must sign the worksheet.

   Note: If for some reason the member will be unavailable at the end of the marking period, ensure enough lead-time in EERW preparation to obtain the signature by mail if necessary. This guidance applies to the evaluation of Reserve personnel in particular.

Unit Responsibility

Any worksheet that is improperly completed will be returned to the unit for correction.

Note: If the member has transferred; it is the unit's responsibility to forward the EERW to the new command.

For more information or assistance

Any questions concerning the Enlisted Employee Review Worksheet should be referred to PSC (ADV) at 785-339-3400. You can also e-mail Advancements at: PSC-ADV@hrsic.uscg.mil.

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Section Overview

Introduction

This section will guide you through the procedures following NJP or courts-martial proceedings, reporting a member UA or a deserter, and reporting a member who has returned after being absent or declared a deserter.

In this section

Topic	See Page
Nonjudicial Punishment (NJP) Checklist	10-B-2
Courts-Martial Checklist	10-B-3
Unauthorized Absence	10-B-5
Desertion	10-B-8
Reporting Return of Absentee or Deserter	10-B-11
Reporting Civil Arrest or Conviction	10-B-14

Nonjudicial Punishment (NJP) Checklist

Introduction This checklist has been provided as a job aid to assist the unit/HRS/SPO in completing all necessary tasks required after NJP proceedings. This job aid is designed to be reproduced locally.

Reference
(a) MJM, Article 1-G-3, Personnel Record Entries
(b) Direct Access Enlisted Employee Review Instructions

NJP checklist Follow these procedures after NJP proceedings.

Step	Action	Reference	Date
1	Forward a copy of the CG 4910 to the servicing HRS/SPO (*or local Direct Access HRS office if applicable*)	MJM	
2	Complete an Enlisted Employee Review in Direct Access. Use “Discipline” for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2 Direct Access Enlisted Employee Review Instructions	
3	File the original Report Of Offense And Disposition (CG-4910), Acknowledgment of Rights Acceptance of NJP, PIO’s report and appeals in the unit punishment log.	MJM, 1 -G-4	
4	Initiate report to COMDT (G-CFI).	PERSEC, 2-V	

Courts-Martial Checklists

Introduction

These checklists have been provided as a job aid to assist the unit/HRS/SPO in completing all necessary tasks required after a courts-martial. This job aid is designed to be reproduced locally.

Reference

(a) MJM,
Section 5-G, Courts-Martial Action and Review
Section 5-E, Suspension of Sentence

Summary courts-martial

Follow these procedures after the convening authority has acted on a summary courts-martial where the member was found guilty.

Step	Action	Reference	Date
1	Forward to the servicing HRS/SPO: • Copy of DD-Form 2329 • Acknowledgment of Rights • Copy of Supplementary Promulgating Order	MJM	
2	Complete an Enlisted Employee Review in Direct Access. Use “Discipline” for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2 Direct Access Enlisted Employee Review Instructions	
3	Initiate report to COMDT (G-CFI).	PERSEC, 2-V	

Continued on next page

Courts-Martial Checklists, Continued

Special or general courts-martial

Follow these procedures after the convening authority has acted on a special or general courts-martial.

Step	Action	Reference	Date
1	Forward copy of promulgating order to servicing HRS/SPO	MJM	
2	Notify servicing HRS/SPO of member's fine repayment intentions (if fine imposed)	MJM	
3	Complete an Enlisted Employee Review in Direct Access. Use "Discipline" for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2 Direct Access Enlisted Employee Review Instructions	
4	Initiate report to COMDT (G-CFI).	PERSEC, 2-V	

Unauthorized Absence

Introduction

This has been provided as a job aid in determining the procedures when a member is in an unauthorized absence (UA) status.

References

(a) PERSMAN , CG Personnel Manual
Article 8-C-1, Unauthorized Absence of Officers
Article 8-C-2, Unauthorized Absence of Enlisted Personnel

UA for less than 24 hours

When a member has been UA for less than 24 hours, the unit is responsible for initiating any and all disciplinary action.

UA for over 24 hours

Use this table when a member fails to report and is placed in unauthorized absence status.

When Member	Then the ...	Does This ...
Fails to report in PCS	Receiving unit	• Contacts unit from which transferred to determine if orders were amended or canceled • Notifies HRS/SPO • Notifies and directs the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation
Fails to report TDY to unit or enters UA while TDY	TDY unit	• Notifies permanent unit
	Permanent unit	• Notifies HRS/SPO that maintains PDR • Notifies and directs the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation
Fails to report for normal duty	Permanent unit	• Notifies HRS/SPO • Notifies and directs the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation

Note: If member is an officer also notify CGPC (opm).

Continued on next page

Unauthorized Absence, Continued

UA for 10 days

When the member has been UA or 10 days, notify the next of kin by letter as follows:

> I regret the necessity of informing you that your (son/daughter/other relationship as appropriate), (insert full name and rate), who enlisted in the Coast Guard on (date of enlistment) and was attached to this unit has been on unauthorized absence since (date). Should you know the whereabouts of your (son/daughter/other relationship), I suggest that you urge your (son/daughter/other relationship) to surrender to the nearest Coast Guard or other military activity immediately since the gravity of the military offense increases with each day of absence. Should your (son/daughter/other relationship) remain absent for 30 days, your (son/daughter/other relationship) will be declared a deserter, and a federal warrant will be issued. Additionally, information concerning the unauthorized absence will be provided to the National Crime Information Center. This information will be available to all law enforcement agencies throughout the country.

For member in paygrade E-4 (less than 4 years service) or more junior, with dependents add the following paragraph in letters to the dependents.

> If your (appropriate relationship) remains in an unauthorized absence status for more than 29 days, you may be entitled to Basic Allowance for Housing (BAH), not to exceed 2 months. To be eligible for BAH you must not be assigned to Government Quarters, and cannot be residing with the member. Your request for BAH must be submitted within 3 months of the date that your (appropriate relationship)'s absence commenced. Please include a statement indicating that you are not residing with your (appropriate relationship).
>
> Submit your request to:
>
> COMMANDING OFFICER (MAS)
> COAST GUARD PERSONNEL SERVICE CENTER
> 444 S. E. QUINCY STREET
> TOPEKA, KS 66683-3591
>
> If you have any questions, contact (local unit) for assistance.

- If the member is E-4 (less than 4 years service) or more junior and dependents are residing with a guardian, send a separate letter to the guardian.

Continued on next page

Unauthorized Absence, Continued

UA at time of sailing

Follow these procedures when a member is UA at time of sailing.

Step	Action
1	Complete the following CG-3307 entry (P&D-5) Missed sailing of this vessel from (place of sailing) on (date) on route to (destination). Member had knowledge of the time movement was scheduled. **Note**: Make a notation on the sailing list.
2	If the vessel deploys for 10 or more days: • Administratively transfer the absentee TDY to the nearest HRS/SPO ashore • Complete a CG-3307 (P&D-5) showing unit transferred to and disposition of records and personal effects • Forward original CG-3307 immediately to CGPC (adm-3), copy to HRS/SPO and unit file
3	Inventory absentee's personal effects and coordinate with the Transportation Officer for shipment of absentee's personal effects **Note**: Shipment will be charged against the member's pay.
4	If member is absent while the vessel is in a foreign port, report absence to the nearest US consulate. Include instructions for disposition of the absentee if apprehended.
5	Notify and direct the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation.

Desertion

Introduction

This has been provided to assist you through the procedures for declaring a member to be a deserter.

Reference

(a) PERSMAN,
Article 8-A-2b, Deserter
Article 8-A-7, Disposition of Personnel Effects of Absentees or Deserters

Procedure for declaring a member a deserter

Use this procedure when declaring a member to be a deserter.

Step	Action
1	Issue DD Form 553 normally the 31st day of absence. • You may declare the member a deserter before the 31st days when the member's intentions are known. **Note**: In cases where a member was declared a deserter early, issue DD Form 553 on the day member was declared a deserter.
2	Send original DD Form 553 to CGPC (adm-3) Distribute signed copies of DD Form 553 to: • Member's HRS/SPO • District Commander (o) of the district that the member is absent from • District Commander (o) of the district of the absentee's home of record • Commandant (G-O) if home of record is within 30 miles of the District of Columbia • Recruiting office nearest to the home of record • Next of kin via certified mail, return receipt requested, deliver to addressee only • Mayor (or chief of police) of the home of record and of any town to which the absentee may have proceeded

Continued on next page

Desertion, Continued

Procedure for declaring a member a deserter (continued)

Step	Action
2 C o n t i n u e d	• Commanding Officer of the Coast Guard unit and the Armed Forces Police establishment nearest the home of record and any area the absentee may have proceeded to • In the case of an alien believed to be in a foreign country: DEPARTMENT OF STATE ATTN VISA OFFICER-SCA/VO STATE ANNEX NO 2, WASHINGTON, DC 20520 • In the case of an U.S. citizen believed to be in a foreign country: DEPARTMENT OF STATE PASSPORT OFFICE/PTLS 1425 K STREET NW WASHINGTON, DC 20524
3	Forward PDR's to the HRS/PERSRU within 2 days
4	Inventory and transfer deserter's personal effects
5	If member is mentally irresponsible at the time of absence from a hospital, inform CGPC (epm), via chain-of-command, by letter

Continued on next page

Desertion, Continued

Procedure for declaring a member a deserter (continued)

Step	Action
6	Notify next of kin by letter with the following: I regret the necessity of informing you that your (son/daughter/other relationship as appropriate) (full name and rate), who enlisted in the Coast Guard at (place of enlistment) on (date of enlistment), and was attached to this unit, has been on unauthorized absence since (date) and is being declared a deserter from the U. S. Coast Guard effective (date). Should you know the whereabouts of your (son/daughter/other relationship), I suggest that you urge your (son/daughter/other relationship) to surrender to the nearest U. S. Coast Guard activity immediately since the gravity of this offense increases with each day of absence. If you have been issued a Uniformed Services Identification and Privilege Card (DD-1173), the privileges of this card are no longer available to you due to desertion of your (son/daughter/other relationship). You should return this card to the nearest U. S. Coast Guard unit.

Reporting Return of Absentee or Deserter

Introduction

This has been provided to assist you through the procedure for reporting the return of an absentee or deserter.

Reference

(a) PERSMAN, Article 8-C-3, Return of Absentee or Deserter

Delivery by civil authorities

Follow these procedures when reporting the return of absentee/deserter.

Step	Action
1	Before accepting delivery by civil authorities ensure: • that no criminal charges are pending • if charges are pending, forward a full report to CGPC (epm/opm) • take no action pending receipt of instructions
2	If civil charges are made after custody has been accepted, the provisions of the Manual for Courts-Martial apply.
3	Give civil authorities no assurance that an absentee or deserter will be tried by military court for violations of Federal or State laws, or that any individual will be retained in or discharged from the service.

Adequate facilities for retention

Before accepting delivery of an absentee or deserter ensure your unit is considered an adequate facility. To be considered an adequate facility for retention of absentees or deserters, the facility must meet these requirements:

- Shore unit - must be equal to or exceed those of a Coast Guard station.
- Afloat unit - must be equal to or exceed those of a WLM class cutter.

Note: If your unit does not meet these requirements, you should request instruction from district commander (o).

Continued on next page

Reporting Return of Absentee or Deserter, Continued

Report of Return of Absentee, DD Form 616

If the member has been declared a deserter, prepare and distribute the DD Form 616 to each addressee who was previously sent a DD Form 553.

Reporting return

Notify the proper authority as shown in the reporting return table.

Notification will contain:

- Name and SSN of the member
- Date, hour, and circumstances of return
- Summary of any pending civil charges

Information regarding the date and hour of absence may be obtained from the absentee only after compliance with Article 31(b) of the Uniform Code of Military Justice.

Reporting return table

Notify the proper authority as shown in the table below.

When return is to	And unit is	Then report to
Unit from which absent		District commander, Info: CGPC (epm) or CGPC (opm)
Unit other than from which absent	under the operational control of a section or group	Section or group commander by telephone or other rapid means Section or group will take action according to the Uniform Code of Military Justice
Unit in same district	not under the operational control of a section or group	District commander, Info: CGPC (epm), or CGPC (opm) Unit from which absent
Unit outside district	not under the operational control of a section or group	District commander from which absent, Info: CGPC (epm) or CGPC (opm) Unit from which absent **Note**: If absentee was apprehended or delivered (vs surrendered), report return to CGPC (epm) or CGPC (opm) Info: Local district commander Unit from which absent

Continued on next page

Reporting Return of Absentee or Deserter, Continued

District responsibility

When notified of the return of an absentee or deserter, the district commander for the homeport/permanent duty station from which the member is absent will:

- Direct the return of an absentee or deserter to a unit in the district for disciplinary action
- Request assignment instruction from CGPC (epm) or CGPC (opm) if the member has been temporarily assigned to a unit other than the unit from which the member is absent for disciplinary action
- Coordinate with PSC (DC) for checkage of the member's pay account for travel costs

Absentee or deserter from other branch of the Armed Forces

Follow these procedures for reporting the return of an absentee or deserter from another branch of the U. S. Armed Forces.

Step	Action
1	Immediately notify the commanding officer of the parent organization by message and request instructions
2	Included the following as info addressees as appropriate: • CGPC (epm) or CGPC (opm) • Adjutant General, Department of the Army • Chief of Naval Personnel • Air Adjutant General, Department of the Air Force • Commandant, Marine Corps
3	Prepare a statement in triplicate that includes the following: • Time date and place taken into CG custody • Circumstances of return (whether surrendered, delivered, or apprehended) • Name and address of person or agency effecting apprehension or delivery
4	Provide an original and one copy of the statement to the representative of the agency taking custody of the member

Reporting Civil Arrest or Conviction

Introduction

The arrest or conviction of a Coast Guard member (active or reserve) by civil authorities must be reported in accordance with the following references.

Reference

(a) PERSMAN, CG Personnel Manual, Section 8-B, Civil arrest and conviction
(b) PERSEC, CG Personnel Security Program, Paragraph 2-V
(c) PAYMAN, CG Pay Manual, Paragraphs 2-C-4, 2-C-5, and 2-C-6

Process Overview

This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references.

Stage	Who Does It	When	What Happens	References
1	Unit	Upon learning of a member's arrest or detention by civil authorities	• Notifies cognizant Security Officer (For units below the Group level this will be the Group Security Officer). • Notifies servicing HRS/SPO if the member is not entitled to service credit while in the custody of civil authorities.	8-B PERSMAN 2-C-4 PAYMAN
2	Security Officer	Upon notification of member's arrest	• Completes a Personnel Security Action Request (CG-5588) (The form is available in the "Forms Menu" program). • Sends completed CG-5588 to COMDT (G-CFI). • Sends copies of the report to: CGPC (epm) or (opm) and (adm-3). • Sends a copy of the report to the district or area security officer (if not collocated).	2-V PERSEC

Continued on next page

Reporting Civil Arrest or Conviction, Continued

Process Overview, Continued

This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references, continued.

Stage	Who Does It	When	What Happens	References
3	SPO/ISC	Upon notification of member's arrest and detention beyond the normal expiration of authorized leave or liberty	• Completes a "General Absence" Transaction in Direct Access. *Home>Administer Workforce>Monitor Absence (GBL)>Use>General Absence* • Upon the member's return to duty, completes a "General Absence" Transaction" and "Employee Entitlements" transaction to start allowances. *Home>Administer Workforce>Monitor Absence (GBL)>Use>General Absence* *Home>Compensate Employees>Maintain Entitlements>Use>Employee Entitlements*	PAYMAN, 2-C-4
4	Security Officer	Within 60 days of the date the incident occurred and every 60 days until final disposition of the case is known	• Submits an interim report to COMDT (G-CFI) using form CG-5588. • Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3).	PERSEC, 2-V
5	Security Officer	Upon notification of the final disposition of the case	• Submits a Final report to COMDT (G-CFI), using form CG-5588. • Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3).	PERSEC, 2-V

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Chapter Overview

Introduction

This chapter provides pay and personnel procedures for reserve mobilization. This chapter also provides checklists, guides, and information required to complete the tasks associated with reserve mobilization.

Use of This Chapter for Mobilization Planning

The process for mobilizing reservists will be exceptionally smoother if units use this chapter as a guide in training members on mobilization entitlements, and utilize the provided checklists for ensuring necessary paperwork has been completed to make a member medically and legally ready for mobilization.

In This Chapter

The following topics are covered in this chapter.

Topic	See Page
The Mobilization Process	11-2
Types of Mobilization	11-4
Mobilization Orders	11-5
Pay Entitlements When Mobilized	11-7
Travel Entitlements When Mobilized	11-16
Other Entitlements When Mobilized	11-20
Mobilization Checklist	11-22
SPO Mobilization Procedures	11-25
Recall of Retired Members	11-30
Travel Claims During Mobilization Status	11-33
Monthly Verification Procedures	11-44
Extension of Mobilization Orders	11-45
The Demobilization Process	**11-47**
Demobilization Checklist	**11-49**
Medical Readiness	**11-50**
SPO Demobilization Procedures	**11-51**

The Mobilization Process

Introduction

The mobilization process depends on communication between several participants. This process is broken down into stages identifying what needs to be completed and who is responsible.

Process

This table provides an overview of the mobilization process.

Stage	Who Does It	What Happens
1	Headquarters	Authorizes mobilization of reservists via ALCOAST.
2	Units Needing Mobilization Resources	Coordinate mobilization needs with ISC (pf) and operational commanders. Providing clear information on berthing and messing facilities at the Mobilization Site.
3	ISC (pf)	Receives direction from operational command (district or area commander) to supply mobilization resources. Coordinates with units to identify reservists to meet mobilization needs. Issues accounting data for pay, allowances, per diem, and travel **via Reserve Orders event in Direct Access**; AND provides information on Berthing and Messing at Mobilization Site to SPO/Field for order preparation.
4	Member's Regularly Assigned Unit	Screens member for mobilization/medical fitness. Ensures member has enough obligated service. Ensures member has up to date vaccinations and physicals. Assists member in making travel arrangements to mobilization site. Sends letter to member's employer notifying of the recall status. Mails member's medical record to the mobilization unit.
5	Member's Regularly Assigned SPO	**Finalizes** mobilization orders. Coordinates any service obligation paperwork. Coordinates processing of travel advance requests. Forwards SPO PDR to the SPO that will be servicing the member at the mobilization site.
6	Member	Reports for mobilization duty. Completes check-in paperwork. Prepares travel claim. Verifies SGLI for self and spouse. Updates mailing/e-mail address and direct deposit information in Direct Access (if applicable) [if access to the CG intranet is unavailable, requests that SPO input mailing address / direct deposit information].
7	Mobilization Unit	Reports reservist aboard. Ensures reservist and dependent/s are issued ID card/s.
8	SPO For Mobilization Unit	Prepares Direct Access transactions to record the mobilization status and duration.
9	PSC (TVL)	Processes requests for travel advances.

Continued on next page

The Mobilization Process, Continued

Process (cont'd)

Stage	Who does it	What Happens
10	SPO / PSC	Maintains reservist pay and leave accounts during mobilization.
11	Member	Submits periodic travel claims (normally monthly) if entitled to per diem while in mobilization status.
12	PSC (TVL)	Processes travel claims.
13	Mobilization Unit & ISC (pf)	Coordinate demobilization in advance with member and SPO.
14	Mobilization Unit	Ensure member is physically qualified for demobilization. Notifies SPO of any uncollected CG Mutual Assistance loan(s) that need to be collected from member's final active duty pay.
15	Member	Notifies SPO of desires concerning disposition of accrued leave (at least 50 days prior to demobilization unless exigent circumstances exist) via a Career Intentions Worksheet.
16	SPO For Mobilization Unit	Inputs Statement of Intent in Direct Access (at least 45 days prior to demobilization unless exigent circumstances exist). Prepares Certificate of Release or Discharge From Active Duty (DD-214) **using Direct Access** and mails to Mobilization Unit for delivery to member. Verifies member's Personnel Data Information File (PDIF) and inputs any missing competencies earned, awards issued or school completions in Direct Access.
17	Mobilization Unit	Delivers demobilization documents to reservist (DD-214 and instructions for reservist for filing travel claim). Mails member's medical record back to the member's regularly assigned unit.
18	SPO For Mobilization Unit	Verifies the member's leave balances. Prepares Direct Access transactions to record the reservist's release from active duty (RELAD). Forwards SPO PDR back to the SPO for the member's regularly assigned unit.
19	Member	Updates mailing/e-mail address and bank account information in Direct Access, if they are changing (if access to the CG intranet is unavailable, requests that SPO input mailing address / direct deposit information). Submits updated SGLI election forms if SGLI coverage was converted to the maximum level during mobilization, and less than maximum coverage is desired after demobilization.
20	PSC (SES)	Processes final active duty payment to reservist. Collects CG Mutual Assistance debts.

Types of Mobilization

Introduction

Members of the Reserve Component may be mobilized under several different legislative authorities. The legislative authority used has implications on the members' pay and travel entitlements.

Legislative Authority

The legislative authorities under which a member may be mobilized are listed below.

Citation	Enabling Authority	In Response to:	Type & Limitations
14 U.S.C. 712	Secretary of Homeland Defense	Serious natural or manmade disasters, accidents or catastrophes	Involuntary. Not more than 30 days per four-month period or 60 per two year period
10 U.S.C. 12301(a)	Congress	War or National emergency declared by Congress	Involuntary. Duration of war or national emergency plus six months.
10 U.S.C. 12301(d)	Designated Authority	Any Event or request for EAD, ADSW, Retired recall, etc.t	Voluntary. Retain only with member consent
10 U.S.C. 12302	President	National Emergency declared by the President	Involuntary. Not more than 24 consecutive months.
10 U.S.C. 12304	President	SELRES Augmentation for any mission deemed necessary by President	Involuntary. Not more than 270 days.

Note: Mobilizations connected with 9/11/2001 have been under the authority of 10 U.S.C. 12302

Mobilization Orders

Introduction

The mobilization orders issued by ISC (pf) drive travel and per diem entitlements. Orders issued in conjunction with mobilization shall specifically state that the member is on active duty in support of a contingency operation.

Use of Government Or Contracted Berthing and Messing

It is Coast Guard policy when Reserve Component (RC) members are mobilized, government/contracted berthing and messing shall be provided to the maximum extent possible.

If government/contracted berthing and messing is not available, the orders shall authorize the appropriate Lodging plus Per Diem rate (lodging, meals, and incidental expenses).

Duration and Document Type Of Mobilization Orders		
Citation	**Type & Limitations**	**Document Type Recommended**
14 U.S.C. 712	Involuntary. Not more than 30 days per four-month period or 60 per two year period	11 – Standard TDY Orders
10 U.S.C. 12301(a)	Involuntary. Duration of war or national emergency plus six months.	13 – Blanket TDY Orders
10 U.S.C. 12301(d)	Voluntary. Retain only with member consent	13 – Blanket TDY Orders
10 U.S.C. 12302	Involuntary. Not more than 24 consecutive months.	13 – Blanket TDY Orders
10 U.S.C. 12304	Involuntary. Not more than 270 days.	13 – Blanket TDY Orders

Reemployment Rights Notation Required On All Orders

All mobilization orders shall contain the following statement:

"If you have any questions regarding your employment/reemployment rights, you may call 1-800-336-4590 (National Committee for Employer Support Of the Guard and Reserve), check online at http://www.esgr.org or the CG Legal Fact Sheet about The Soldiers' and Sailors' Civil Relief Act (SSCRA) @ http://www.uscg.mil/legal/la/topics/sscra/about_the_sscra.htm "

Sample Mobilization Orders

DEPARTMENT OF TRANSPORTATION
U.S. COAST GUARD
(CG-5131 (Rev. 11-94))

STANDARD TRAVEL ORDER FOR MILITARY PERSONNEL

1. SSN	2. NAME (Last Name, First Name, MI)	3. RATE/RANK	4. CURRENT DUTY STATION
EMPLOYEE ID	SMITH, JOHN D.	YNC/E7	CG HRSIC

5. LEAVE ADDRESS (Street / Address, City, State, Zip / Area Code & Phone)
444 SE QUINCY ST
TOPEKA, KS 66683

6. TRANSFER AUTHORITY
COMDT MSG 000000Z MMM 03

7. TRAVEL AND PAY NECESSARY TO THE EXECUTION HEREOF IS REQUIRED IN THE PUBLIC INTEREST AND IS AUTHORIZED CHARGEABLE AGAINST:

AGENCY	DISTRICT	APPN CODE	LIM CODE	ALLOT FUND	ALLOT LVL	PROGRAM ELEMENT	COST CENTER	OBJECT CLASS	DOCUMENT IDENTIFICATION NUMBER: TYPE	FY	NUMBER	SUFFIX	ESTIMATED COST	MISC
2	P	103	299	10	0	10	70880	117H	71	03		000	1000.00	P/A
2	P	103	299	10	0	10	70880	122R	71	03		001	80.00	FIC
2	P	103	132	30	0	76	70880	2108	14	03		000	1800.00	GTR
2	P	103	132	30	0	76	70880	2108	13	03		000	97.48	TVL

8. DAYS AUTHORIZED DELAY EN ROUTE BY REGULATIONS OR ENDORSEMENT HEREON (indicate number of days delay authorized):
02 TRAVEL TIME ___ PROCEED TIME ___ LEAVE (INCONUS) ___ LEAVE (OUTCONUS) ___ COMPENSATORY ABSENCE ___ NON CHARGEABLE ABSENCE ___ DATE LINE ADJUSTMENT

9. PROCEED AND REPORT IN THE ORDER LISTED BELOW: SCHEDULED DEPARTURE DATE:

UNIT/STATION/PLACE	NATURE OF DUTY	TIME/DATE REPORTING
53-54700 CG HRSIC TOPEKA, SHAWNEE, KS 66683	MOBILIZATION	0800 MMM DD YYYY
08-36240 CG GP NEW ORLEANS	TDY MOBILIZATION	0800 MMM DD YYYY
METAIRIE, JEFFERSON, LA 70005		
WITH POSSIBLE FURTHER TDY LOCATIONS TO BE DESIGNATED		

10. REMARKS/AUTHORIZATIONS/ADDITIONAL INSTRUCTIONS:

ORDERS ISSUED UNDER 10 USC 12302 ARE NORMALLY FOR A MINIMUM OF 12 MONTHS AND A MAXIMUM OF 24 MONTHS. SUCH ORDERS MAY BE EXTENDED, UNDER COMDT AUTHORITY, SO LONG AS THE PERIOD OF ACTIVE DUTY DOES NOT EXCEED MORE THAN 24 CONSECUTIVE MONTHS. DATES OF THIS ORDER ARE MMM DD YYYY TO MMM DD YYYY. ORDERED TO ACTIVE DUTY IN SUPPORT OF CONTINGENCY OPERATION _____.
BERTHING AVAIL / NOT AVAIL IAW JFTR; MESSING AVAIL / NOT AVAIL IAW CG PAY MAN
(WILL NEED ENDORSEMENT ON AVAILABILITY OF BERTHING AND MESSING AT TDY SITE)
AUTH / NOT AUTH BAH W OR W/O DEPN IAW CG PAY MAN & JFTR
ADDITIONAL SPECIFIC DUTY: SEA DUTY, DIVING, FLIGHT CREW, PHYSICIAN ASSISTANT
AUTH USE OF GOV OR POV (LOCAL MILEAGE AUTHORIZED) OR GTR.
MEMBER DOES / DOES NOT HAVE GOVERNMENT CREDIT CARD.
AUTH DUAL LODGING WHILE TDY IN NEW ORLEANS, LA FROM
MMM DD YYYY TO MMM DD YYYY FOR CITY, COUNTY, STATE AND ZIP CODE

ACCOUNTING TO CHANGE EFFECTIVE OCT 1, 2003 UNLESS DEMOBILIZED:
2/P/104/299/10/0/10/70880/117H/71/04/#########000 PAY AND ALLOWANCES
2/P/104/299/10/0/10/70880/122R/71/04/#########001 FICA
2/P/104/132/10/0/10/70880/2108/14/04/#########000 GTR
2/P/104/132/10/0/10/70880/2108/13/04/#########000 BLANKET TRAVEL

"IF YOU HAVE QUESTIONS REGARDING YOUR EMPLOYMENT/REEMPLOYMENT RIGHTS, YOU CAN CALL 1-800-336-4590 (NATIONAL COMMITTEE FOR EMPLOYER SUPPORT OF THE GUARD AND RESERVE), CHECK ON-LINE @ HTTP://WWW.ESGR.ORG OR ON-LINE FOR THE CG LEGAL FACT SHEET ABOUT THE SOLDIERS' AND SAILORS' CIVIL RELIEF ACT (SSCRA) @
HTTP://WWW.USCG.MIL/LEGAL/LA/TOPICS/SSCRA/ABOUT THE SSCRA.HTM"

11. Member's Acknowledgement: I have been counselled on the appropriate provisions of the JFTR and Coast Guard Directives regarding my entitlements, and have had all my questions answered. If under PCS orders, I understand I must secure a "Release From Mandatory Assignment to Government Housing" from the Local Housing Authority (LHA) prior to procuring housing in the civilian sector of the area surrounding my new duty assignment. Further, I acknowledge receipt of these orders and understand that I must submit my travel claim for certification and liquidation purposes within 3 working days of either my PCS reporting, ADT greater than 20 weeks, or completion of travel in connection with my separation.

12a. AUTHORIZING OFFICIAL (Name, Rate/Rank, Signature)	12b. DATE	13a. MEMBER'S SIGNATURE AND PLACE ORDERS RECEIVED	13b. DATE
MICHAEL SMITH, CAPT, USCG		JOHN D. SMITH TOPEKA, KS	

PREVIOUS EDITIONS ARE OBSOLETE

Pay Entitlements When Mobilized

Introduction Pay entitlements depend on the legislative authority under which the orders are issued (Title 10 or Title 14, U.S. Code).

References

(a) PAYMAN
(b) JFTR

Summary This table is a summary of mobilization pay entitlements:

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Basic Pay	Basic Pay	Basic Pay	Figure 2-1, reference (a)
Officer Basic Allowance for Subsistence (BAS)	Officer BAS	Officer BAS	Section 3-A, reference (a)
Enlisted Basic Allowance for Subsistence (BAS)	Ashore unit:	Ashore unit:	Section 3-B-4.b., reference (a)
	EnlistedRegular BAS No government dining facility available	EnlistedRegular BAS No government dining facility available	
	Enlisted BAS	Enlisted BAS	Section 3-B-5, reference (a)
	ENL BAS minus DISCOUNT MEAL RATE (ESM or EUM)	ENL BAS minus DISCOUNT MEAL RATE (ESM or EUM)	Section 3-B-5, reference (a)
	Afloat unit with an established dining facility:	Afloat unit with an established dining facility:	
	ENL BAS minus DISCOUNT MEAL RATE (ESM)	ENL BAS minus DISCOUNT MEAL RATE	Section 3-B-5.b, Reference (a)

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Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Basic Allowance For Housing (BAH)	Member with dependents. BAH-I is based upon the principal place of residence from which recalled, *unless* authorized transportation of household goods, then BAH-I is authorized for duty station location Member without dependents. BAH-I is based upon the principal place of residence from which recalled, if the member is ordered to a duty locale where member is unable to occupy their principal residence and was not authorized special storage of household goods. Military member married to another military member. See Figure 3-12, reference (a).	BAH-II (since active duty orders are for 139 days or less).	Section 3-C-10, Figure 3-7, Figure 3-8, Figure 3-12, reference (a)
Cost-of-Living Allowance in CONUS (CONUS COLA).	CONUS COLA is payable at the rate prescribed for the location of the member's principal place of residence.	Not payable.	Para U8011, reference (b)

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Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Overseas Housing Allowance (OHA)	OHA is only payable when ordered to active duty from an OUTCONUS residence. The OHA rate payable will be based on the location of the member's primary residence.	No entitlement.	Para U7150-H, reference (b)
Overseas Cost of Living Allowance (OUTCONUS COLA)	OUTCONUS COLA is only payable when ordered to active duty from an OUTCONUS residence. The OUTCONUS COLA rate will be based on the location of the member's primary residence.	OUTCONUS COLA is only payable when ordered to active duty from an OUTCONUS location and there is no per diem entitlement.	Para U7150-H, reference (b)
Family Separation Allowance (FSA)	Member with dependents. FSA- T if assigned in a TDY status *OR* FSA-S to a ship away from dependents for a continuous period of 31 days or more. NOTES: (1) A member must be away for 30 continuous days without family visits at the onset of the mobilization. (2) After the first 30 days, reasonable visits are permissible provided visits are of a temporary nature not exceeding 30 consecutive days in duration.	No entitlement.	Section 3.G, reference (a)
Family Supplemental Subsistence Allowance (FSSA)	FSSA is payable when the household income is less than 130% of the federal poverty level and the member is normally eligible for food stamps.	FSSA is payable when the household income is less than 130% of the federal poverty level and the member is normally eligible for food stamps.	Section 3-N, reference (a)

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Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Enlisted Uniform Issue	If recalled from the IRR or Retired Reserve, an enlisted member may be entitled to an issuance of uniforms depending on time elapsed since retirement or transfer to IRR. Rules vary consult with G-WTR for guidance.	No entitlement	ALCOAST 418/01
Enlisted Clothing Maintenance Allowance	BMA if receiving RBMA prior to mobilization. SMA if receiving RSMA prior to mobilization.	Continues to receive RBMA or RSMA while on active duty.	Figure 3-26, reference (a)
Civilian Clothing Monetary Allowance	STADCMA-CIV	STADCMA-CIV (period is 30 days in duration)	Figure 3-23, Rules 10 & 11, reference (a)
Officer Uniform Allowance	Additional Officer Uniform Allowance is payable if the active duty period is more than 90 days duration, and the officer has not served on another period of active duty of more than 90 days within the past 2 years.	Not payable (since active duty orders are for less than 91 days).	Section 3.K.3, reference (a)
Hardship Duty Pay for Location (HDP-L)	If mobilized to a designated Hardship Duty Location for over 30 consecutive days.	No entitlement.	Figure 4-3, reference (a)
Career Sea Pay (CSEAPAY)	If assigned to a sea pay eligible vessel (or qualifying mobile unit), eligible for CSEAPAY at the Level I rate or the Level-3 rate if operating in-theater.	If assigned to a sea pay eligible vessel (or qualifying mobile unit), eligible for CSEAPAY at the Level I rate or the Level-3 rate if operating in-theater.	Figure 4-6, reference (a) E-Mail ALSPO D/03 for Level-3 entitlement if operating in-theater
Diving Duty Pay	When assigned by orders to diving duty.	When assigned by orders to diving duty.	Figure 4-7, reference (a)
Imminent Danger Pay	When on official duty in a designated imminent danger pay area.	When on official duty in a designated imminent danger pay area.	Figure 4-9, reference (a)
Board Certified Pay for Physician Assistants	Officers designated as physician assistants.	Officers designated as physician assistants.	Section 4-J, reference (a)

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Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Combat Tax Exclusion	If in an active duty status in a designated combat zone.	If in an active duty status in a designated combat zone.	Section 8-G, reference (a)
Special Duty Assignment Pay (SDAP) Enlisted	If ordered to duties which qualify for SDAP.	If ordered to duties which qualify for SDAP.	Section 4-I, reference (a) COMDTINST 1430.10 (series)
Hazardous Duty Incentive Pay (HDIP)	When under flight orders as a crew member, non-crew member, or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is not payable.)	When under flight orders as a crew member, non-crew member, or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is not payable.)	Section 5-B, reference (a)
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	When assigned to duty involving participation in flight operations on the flight deck of a ship and if appropriate orders are issued and minimum evolution requirements are met.	When assigned to duty involving participation in flight operations on the flight deck of a ship and if appropriate orders are issued and minimum evolution requirements are met.	Section 5-C, reference (a)
Leave / Lump Sum Leave Payment	When on active duty for 30 or more consecutive days, members accrue 2.5 days of leave per month. Upon demobilization, remaining leave balances may be sold, even if the member previously sold 60 days of annual leave during his/her career.	No entitlement (since orders are for less than 31 days).	Article 7.A.11, CG PERSMAN Section 10-A, reference (a)

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Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Servicemembers' Group Life Insurance (SGLI)	When ordered to active duty for more than 30 days - *automatically* insures Member SGLI for $250,000 and Spouse SGLI for $100,000. If the member does not desire maximum SGLI / Spouse SGLI coverage, *must execute a new* election for reduced or no coverage. Also entitled to Child SGLI coverage, $10,000 per child at no cost. **Note:** SGLI Coverage *does not* revert back to original SELRES designation upon demobilization.	Continues prior level of SGLI / Family SGLI coverage while on active duty for 30 days or less.	Section 6-A, reference (a)
Savings Deposit Program	When assigned to a qualifying combat area is entitled to deposit up to $10,000 in a Savings Deposit Program earning 10% interest per year, compounded quarterly.	Not applicable.	Section 6-F, reference (a)
Advance Pay / BAH / OHA	When recalled to active duty is not entitled to advance pay or advance BAH / OHA.	Not applicable.	Section 9-D-3, reference (a)
Hazardous Duty Incentive pay for Visit, Board Search and Seizure Boarding Teams (HDIP-VBSS)	When assigned to a designated boarding team billet within a designated combat theatre of operations and a minimum of three boardings are made during a calendar months.	When assigned to a designated boarding team billet within a designated combat theatre of operations and a minimum of three boardings are made during a calendar months.	ALCOAST 353/04

Continued on next page

Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Thrift Savings Plan (TSP)	If called to active duty for a period of more than 30 days, a member of the Ready Reserve may make a new/revised TSP election within 60 days of being called to active duty.	Not applicable.	Section 6-G, reference (a) TSP Web site @ http://www.tsp.gov/
TRICARE Dental Program	Reservists enrolled in TRICARE Dental for themselves and/or their families prior to mobilization are automatically converted to the lower active duty rate(s) while in a mobilized status. Reservists not enrolled in TRICARE Dental prior to mobilization may enroll their family while on active duty. Upon demobilization: (1) the family will be automatically converted to the higher reserve rate; and (2) the reservist has the opportunity to enroll in TRICARE Dental for him/herself.	Member continues prior level of TRICARE Dental Program coverage.	Section 6-C, reference (a) United Concordia Web Site @ http://www.uccci.com/ or United Concordia Customer Service @ 1-800-866-8499

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Title 10 Reserve Mobilization Pay and Allowance Matrix

	Paid To		Eligibility &/or Rate Based Upon							
Entitlement	All	Some	Pay Grade	Longevity	Dep Status	Unit Type	Duty Locale	Home Locale	Nature of Orders	Note(s)
Basic Pay	X		X	X						Key Longevity Date is Pay Base Date (LES Block 5)
Basic Allowance for Subsistence	X		X			X				**Off = $175.23;Enl = $254.46; Reg = $262.50; Disc = $7.10 day**
Basic Allowance for Housing	X		X		X			X		Not pd if OHA paid. Special Mbr to Mbr. www.dtic.mil/perdiem/
INCONUS Cost of Living Allowance		X	X	X	X			X		Special mbr to mbr rules. www. dtic.mil/perdiem
Overseas Housing Allowance		X	X		X			X		ONLY if Residense OUTCONUS www.dtic.mil/perdiem/
OUTCONUS Cost of Living Allowance		X	X	X	X			X		ONLY if Residense OUTCONUS www.dtic.mil/perdiem/
Family Separation Allowance		X			X	X	X	X		Away from deps TDY or afloat for > 30 Days. **$250 per month**
Family Supplemental Subsistence Allow		X			X					Income qualifies for food stamps. www.dmdc.osd.mil/fssa/
Enlisted Clothing Maintenance Allow	X		X	X						**BMA<3Yrs = $19.74M; $23.24F SMA=>3yrs=$28.20M; $33.19F**
Enlisted Clothing Issue to IRR/Retired		X	X						X	Recalled IRR & retired mbrs are auth issuance on CG-3019(A)
Additional Officer Uniform Allowance		X	X							$200 each acdu > 90 DAYS. Not payable > once within 2 years
Hardship Duty Pay for Location		X					X			$50-$150. www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/

	Paid To		Eligibility &/or Rate Based Upon							
Entitlement	All	Some	Pay Grade	Longevity	Dep Status	Unit Type	Duty Locale	Home Locale	Nature of Orders	Note(s)
Career Sea Pay		X	X	X		X				$20-$610. Payable at Level 1 rate only as temp assignment unless operating in-theater, then Level 3 rate
Diving Duty Pay		X	X						X	$150-$240. www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2
Imminent Danger Pay		X					X			**$225.** Assigned (including TDY) to 1 of 45 qualify areas.
Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure		**X**				**X**			**X**	**$150.00. Minimum of 3 operational boarding in combat theatre.**
Board Certified Pay Physician Assts		X		X					X	$166-416 per month. For PYAs certified by (G-WKH)
Combat Tax Exclusion		X					X			Assigned (including TDY) to 1 of 6 qualifying areas.
Special Duty Assignment Pay		X	X			X			X	**$75-$375.**
Crew & Non-Crew HDIP Flight Pay		X	X			X			X	$150-$250. Crew or non-crew mbr or tech observer military aircraft
Flight Deck Hazardous Duty Pay		X				X			X	$150. On ship launching, recovering, refueling aircraft.
Leave Accrual & Lump Sum Leave	X									Earn 2.5 days per month. Can sell leave > 60 days in career.
Servicemembers' Group Life Insurance	X				X					$250K/$100K/$10K automatic coverage unless decline.
Thrift Savings Plan	X								X	60 days to enroll or change election if called to acdu > 30 days
TRICARE Dental Program	X								X	See enrollment rules at www.ucci.com
Savings Deposit Program		X					X			$10,000@10% interest. Only 6 qual'g areas. Must withdraw.

Travel Entitlements When Mobilized

Introduction

Members mobilized on active duty are entitled to temporary duty (TDY) travel entitlements. When not provided with government/ contracted berthing and messing, the member is entitled to lodging plus per diem (meals and incidental expenses, M&IE). Mobilized members are not entitled to permanent change of station (PCS) entitlements.

Note: *It is Coast Guard policy that mobilized members shall be provided Government or contracted berthing and messing to the maximum extent possible.*

References

(a) JFTR
(b) Lodging Plus Per Diem rates online at http://www.dtic.mil/perdiem/pdrates.html
(c) ALCOAST 544/02

Important Rules, Which Prohibit the Payment of Per Diem

Payment of per diem is not authorized when the member:

1. Commutes between his/her home and his/her duty station, even if the residence lies outside the local reasonable commuting distance.
2. Is on leave.

Travel Advances on Blanket orders (13 document type)

Advances drawn for periods of TDY under blanket orders will only be liquidated against the member's final claim (either at the end of TDY or the end of the Fiscal Year, which ever occurs first). Members should only take one advance during a TDY/Recall period and only annotate the advance (in block 10) on the final TDY claim. This method will eliminate the need for multiple advances during the TDY period, while ensuring adequate funds are available to execute orders. The final claim will serve to liquidate the advance.

Travel Entitlements When Mobilized, Continued

Summary The table below summarizes the travel entitlements of mobilized members:

Travel Entitlement	Summary of Entitlement	Entitlement Rate	Reference
Mileage	Authorized reimbursement for one round trip from residence to/from TDY site unless the residence and TDY site are in the same city/town corporate limits.	Current local mileage rate not to exceed the cost of Government-procured transportation.	Ref. (a), U7150
Local Mileage	The Order Issuing Official may authorize local mileage for travel between lodging, duty site and dining facility.	Current local mileage rate.	Ref. (a), U3510
Lodging, Meals, And Incidental Expenses (M&IE)	Only authorized if: (1) not provided government quarters; and (2) not assigned to a career sea pay eligible vessel; and (3) member does not commute between home and duty station. Notes: (1) If government quarters are not available, by regulation, government messing is considered not available. (2) If mobilized on TDY orders to another location, and required to procure and maintain quarters at both locations, the member may be entitled to dual lodging. The orders must specifically authorize dual lodging and state the location and period of time.	See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	Ref. (a), U7150

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Travel Entitlements When Mobilized, Continued, Continued

Summary (cont'd)

Travel Entitlement	Summary of Entitlement	Entitlement Rate	Reference
Lodging, Meals, And Incidental Expenses (M&IE)	**Notes: (Continued)** (3) M&IE is payable for whole days except for the departure and return day, which are payable at 75% of the appropriate M&IE rate.	See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	
On Base & Proportional Per Diem	At an INCONUS military installation with quarters and messing (all 3 meals) -- Government Base M&IE.		Ref. (a), Para U4125
	At a location with berthing but only one or two meals are available -- Proportional Per Diem.		Ref (a), Para U4125
	Note: Travel claims for proportional per diem must be submitted manually to PSC (TVL). They cannot be processed through the UTS system.		

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Travel Entitlements When Mobilized, Continued, Continued

Special Rules When Lodging Is Obtained On a Monthly Basis

Mobilized members, who obtain lodging on a monthly basis and take short periods of leave, may be reimbursed the monthly lodging charge. However, per reference (b), they are not entitled to meals and incidental expenses (M&IE) on leave days. The monthly lodging reimbursement (including utilities and maintenance) may not exceed the daily lodging per diem for the total days of per diem.

Examples:

(1) The monthly lodging cost is $1,200 in a $50 lodging area. Takes 5 days of leave. The monthly lodging reimbursement will be calculated by dividing the remaining days (25 days) into the monthly lodging cost of $1,200 to arrive at $48 per day. Since $48 is below the maximum daily limit (of $50), the member would be reimbursed the full monthly $1,200 lodging cost.

(2) The monthly lodging cost is $1,200 in a $50 lodging area. Takes 10 days of leave. The monthly lodging reimbursement will be calculated by dividing the remaining days (20 days) into the monthly lodging cost of $1,200 to arrive at $60 per day. Since $60 exceeds the maximum daily limit (of $50), the member would only be reimbursed $1,000 ($50 times 20 entitled days).

In both of the above examples, the member is NOT entitled to M&IE on leave days. Leave must be indicated on the travel claim even if monthly calculation for lodging is used.

Other Entitlements When Mobilized

Introduction

Mobilized members have other entitlements and benefits in addition to pay and travel.

References

(a) JFTR
(b) DOD Instruction 1000.13, Identification (ID) Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals available online at: http://www.dtic.mil/whs/directives/corres/pdf/i100013p.pdf
(c) Coast Guard Medical Manual, COMDTINST M6000.1B (series)
(d) PAYMAN
(e) RPM
(f) ALCOAST 307/02
(g) ALCOAST 153/03

Summary

The table below summarizes other entitlements:

Entitlement	Summary	Reference
Transportation	Members recalled under 10 U.S.C. 12302 are entitled special temporary household goods storage, including privately owned vehicles (POVs). Authority must be requested from Commandant (G-WPM-2). Members without dependents that are authorized special storage of household goods (but no POV) lose entitlement to BAH-I.	Ref. (a), U4470-B and U5466-A.2
Identification Card (ID Card)	Members recalled to active duty for more than 30 days are entitled to an active duty ID card. Members and their eligible dependents are afforded full commissary, exchange, and MWR privileges.	Ref. (b)
Civilian Reemployment	Detailed in the following web sites: •http://www.uscg.mil/hq/reserve/recall/recall.htm •http://www.esgr.org/	

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Other Entitlements When Mobilized, Continued

Summary (cont'd)

Entitlement	Summary	Reference
Legal Readiness	Members who are a substantial distance from home might consider executing a Power of Attorney to give another individual the right to act on the member's behalf. A Special Deployment Power of Attorney is recommended over a General Power of Attorney. Members should ensure they have an up to date will for distribution of assets and care of dependents in the event of death. Members may want to set up a Living Will or Advanced Health Care Directive to advise the medical profession on the level of life support to be provided in the event the member is terminally ill. These documents can also identify individuals who may make health care decisions for a member, and provide direction to medical professionals about a member's willingness to donate organs.	Consult local Legal Assistance Office, or see the HQ Reserve Web site @ http://www.uscg.mil/hq/reserve/Recall/Recall.htm
Medical / Dental	Members recalled for more than 30 days to support a contingency operation are authorized medical and dental benefits while on active duty. Dependents of members on active duty for 31-179 days are entitled to: (a) TRICARE Standard; (b) TRICARE Extra; (c) space-available treatment in military medical treatment and (d) are eligible to apply for enrollment in TRICARE Prime as well. Demobilized members are entitled to transitional health-care benefits based on their total active military service: • Members with less than six years of service (and dependents) are eligible for 60 days of medical coverage under the TRICARE Transitional Health Care Demonstration Project. • Members with more than six years active duty are entitled to 120 days of coverage for themselves and their dependents. Visit this web site for more TRICARE information specific to reserve mobilization: http://www.tricare.osd.mil/reserve/ Members who incur a disability while on active duty shall follow procedures outlined in reference (e).	Reference (c), 12-Q Ref (d) Ref (g), 7-E, Ref (e) Ref (f)

Mobilization Checklist

Introduction

This checklist provides a listing of tasks to be completed by the member's unit or units (both the regularly assigned unit and the unit the member is reporting to) required when a reservist is mobilized on active duty.

Unit Checklist

Step	Action	Date
1	Send letter to member's employer concerning mobilization status (see sample on page 11-24).	
2	Counsel member to ensure legal documents are up to date (will, power of attorney, and legal support documents). See previous page.	
3	Ensure member has enough obligated service.	
4	Ensure member's dependents have a telephone number for reaching the member during mobilization, as well as the process for contacting the Red Cross in an emergency situation.	
5	Ensure member and his/her dependent/s are issued active duty ID card/s. If the member's mailing address is changing, update address in DEERS through local DEERS site or by calling the DEERS support office (Phone: 1-800-538-9552 except in CA, HI, and AK; for CA 1-800-334-4162; for HI and AK 1-800-527-5602).	
6	Advise member to update mailing/e-mail address and direct deposit information in Direct Access if they are changing. If member does not have access to the CG intranet, supply address and direct deposit information to SPO for data entry into Direct Access.	
7	Advise member that changes in marital or dependency status while in a mobilization status need to be immediately reported to the SPO to avoid potential overpayments/underpayments.	
8	Upon reporting to the mobilization site, ensure member's orders are endorsed to show date member reported, the mobilization unit's subsistence status, the quarters the member will occupy during mobilization, and the member's current dependent status. Ensure endorsed orders are forwarded to SPO.	
9	If the member is assigned outside his/her state of legal residence, and that state does not tax military pay while assigned outside the state (i.e., applies to residents of AZ, CA, CT, ID, MN, MO, MT, NJ, NY, OR, PA, VT, PR), advise the member that he/she may submit a state tax withholding form to claim exemption from state tax withholding.	
10	Ensure member completes travel claim. Administratively review & approve the travel claim and forward to PSC (TVL).	

Continued on next page

Mobilization Checklist, Continued

Unit Checklist (cont'd)

Step	Action	Date
11	Conduct appropriate security briefing. (i.e. Vehicle/Access Passes and Information/Clearances)	
12	Ensure member has physical exam if he/she has not had a physical within the past 5 years (within past 12 months if over age 50).	
13	Ensure member verifies dependency information on the Direct Access generated BAH/Dependency Data form. Members can update this information by submitting a Dependency Worksheet (CG PSC-2020) to their SPO.	
14	Ensure member verifies beneficiaries on the Designation of Beneficiaries form (CG PSC-2020D). Submit a new form to the SPO if updates are needed.	
15	Ensure member verifies their Emergency Data in Direct Access. SPOs and/or the member can make changes to the emergency data as needed via Direct Access.	
16	Counsel member concerning SGLI benefits during mobilization (as detailed on page 11-12). If member has spouse, have member complete Form SGLV-8286A (Spouse SGLI Election). Ensure member reviews Form SGLV-8286 (Member SGLI Election) to verify that beneficiaries are correct; have member complete new SGLV-8286 if maximum Member SGLI coverage is not desired. Forward updated/new Forms SGLV-8286 and SGLV-8286A to SPO.	
17	Counsel member concerning available Work Life Resources (Employee Assistance Program, Relocation Assistance Program, Transition Assistance Program, Special Needs Program).	
18	Counsel member concerning financial responsibilities. Advise member that if he/she has child support garnishments being deducted from his/her civilian pay, the member needs to make arrangements for payment of such obligations while in a mobilization status; delinquent child support payments will be subject to involuntary collection from the member's military pay under the Treasury Offset Program.	
19	Member affirms that he/she is not in receipt of a claim for disability compensation, pension or retired pay from the DVA. If so, the member is responsible for waiving the amount of compensation he/she has received on days in which they received military pay.	

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Mobilization Checklist, Continued

SAMPLE LETTER

TO BE SENT TO EMPLOYER OF MOBILIZED RESERVIST

Dear Sir or Madam:

I am writing this letter to thank **the Employer** for its past support of **Member's Full Name's** participation as a valued member of U.S. Coast Guard **Unit – Long Title**. It is only with positive support from our reserve members' families and employers that the United States military services are able to protect the national interests of our country.

At this time I need to advise you that – due to recent events – **member** has been involuntarily called to active duty with our unit under Title **10/14** of the United States Code. As **a Yeoman Second Class** at **unit**, he/she will be deployed either within the United States or overseas as directed by proper authority. The orders are for a period of **###** days.

I am enclosing some information from the Employer Support of the Guard and Reserve (ESGR) that might answer questions that you have concerning your rights and the employee's rights under the law, and provide some resources to answer others. I'd also like you to feel comfortable in contacting me personally, at **Phone Number / E-mail address**, should you still have questions or concerns.

Once again, my personal thanks for the part your organization is playing in helping to keep America strong.

Sincerely,

Commanding Officer

SPO Mobilization Procedures

Introduction The following checklists provide listings of the transactions to be completed by the servicing SPO when a reservist is mobilized.

Title 10 Checklist Utilize this checklist when processing Title 10 mobilizations.

Checklist for Title 10 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Required	Reserve Orders in Direct Access. Note: These instructions are not intended to be all inclusive only to address areas which may be of confusion. See the Direct Access Online User Guide for detailed instructions. Be sure the transaction shows the following. Order Start Date: This date is the day the member leaves his/her home to travel to the mobilization site. Under the Reserve Specific Info tab: • Purpose = Invol Active Duty, Title 10 • Payment for Duty = Pay and Allowances • Payment for Travel = Single Travel Claim • Days of ADT-At requirement satisfied by these orders = blank • Select Full Entitlements Under the Reserve Orders Tab: • Purpose = Not required but select approximate entry. • Order Begin Dt and Order End Dt = Dates of mobilization period including any delay enroute. • Select the Contingency Operation option if applicable	Direct Access Title 10 Mobilization Online User Guide
Required if principal residence is INCONUS	Change BAH. Be sure the transaction shows: Postal Code = zip code of principal place of residence as prescribed on page 11-8 of this chapter.	Direct Access Online Guide for BAH
Required if principal residence is INCONUS	Start CONUS COLA. Be sure the transaction shows: Postal Code = zip code of member's principal place of residence as prescribed on page 11-8 of this chapter.	Direct Access Online Guide for CONUS COLA

Continued on next page

SPO Mobilization Procedures, Continued

Title 10 Checklist (cont'd)

Checklist for Title 10 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Required if member is enlisted	Start Subsistence Allowance. Be sure the transaction starts the appropriate subsistence prescribed on page 11-7 of this chapter.	Direct Access Online Guide for BAS
Optional	FSA-T or FSA-S. Submit only if a member with dependents meets requirements prescribed on page 11-9 of this chapter.	PAYMAN, 3-G
Optional	Start OHA. Submit only if ordered to active duty from OUTCONUS residence. Be sure the transaction starts OHA based on the location of the primary residence.	Direct Access Online User Guide
Optional	Start OUTCONUS COLA. Submit only if ordered to active duty from OUTCONUS residence.	Direct Access Online User Guide
Optional	Enlisted Uniform Issue for Members Recalled From IRR or Retired Reserve. Fax Form CG-3019 or CG-3019A, with a copy of the mobilization orders, to COMDT (G-WTR) at 202-267-4243.	ALCOAST 418/01
Optional	Additional Reserve Officer Uniform Allowance. Submit only if the officer meets requirements prescribed on page 11-10 of this chapter.	Direct Access Online User Guide
Optional	Start Hardship Duty Pay – Location. Start Career Sea Pay. Start Diving Duty Pay. Start Imminent Danger Pay. Start Combat Tax Exclusion. Start Special Duty Assignment Pay. Start Crew/Non-crew Flight Pay. Start Flight Deck Hazardous Duty Incentive Pay. Start Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams. Submit only if member meets the requirements prescribed on pages 11-10 and 11-11 of this chapter.	Direct Access Online User Guide
Optional	Start FSSA (Family Subsistence Supplement Allowance) Submit application to PSC (MAS).	PPPM, 7-B-8
Optional	Board Certified Pay for Physician Assistants. If meets the requirements prescribed on page 11-10 of this chapter, fax copy of orders to PSC (MAS) at 785-339-3760.	PAYMAN, 4.J.2
Optional	Thrift Savings Plan. Fax Form TSP-U-1 and **TSP-U-1-C (if appropriate)** to PSC (MAS) at 785-339-3760.	PPPM, 8-C
Optional	TRICARE Dental Program. Enrollment changes are made directly through United Concordia, the TRICARE dental contractor.	PPPM, 5-B-4

Continued on next page

SPO Mobilization Procedures, Continued

Title 10 Checklist (cont'd)

Checklist for Title 10 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Optional	Servicemembers' Group Life Insurance. Members will be insured for the maximum $250,000 SGLI coverage during mobilization status unless an election for lesser coverage is submitted. If a member does not want maximum SGLI coverage, a Life and AD/D Benefits transaction is required to be submitted to show whether the member desires maximum, reduced, or no SGLI coverage while in a mobilization status. Required for Retired Recall.	PPPM, 5-A-7 Direct Access Guide, SGLI
Optional	Spouse SGLI. Spouses will be insured for the maximum $100,000 Spouse SGLI coverage during mobilization status unless an election for lesser coverage is submitted. If a member has a spouse, and does not want maximum $100,000 Spouse SGLI coverage, a Life and AD/D Benefits transaction is required to be submitted to show whether the member desires maximum, reduced, or no Spouse SGLI coverage while in a mobilization status. Required for Retired Recall if has Spouse.	PPPM, 5-A-14 Direct Access Guide, SGLI
Optional	Direct Deposit Account Change. If the member is unable to enter transaction in Direct Access then the SPO will complete it. Required for Retire Recall.	Direct Access Guide, Direct Deposit Change
Optional	Mailing Address Change. If the member is unable to enter the transaction in Direct Access then the SPO will complete it. Required for Retire Recall.	Direct Access Guide, Mailing Address Change
Optional Retired Recall Required	State Tax Change, if the member is assigned to duty outside his/her state of legal residence and requests that state tax withholding be stopped because his/her state does not tax military pay while stationed outside the state.	Direct Access Guide, State Tax Change
Optional	Change in Dependency/Emergency Data if there is a change in dependents or beneficiaries. Required for Retire Recall	Direct Access Guide, Dependency/ Emergency Data

SPO Mobilization Procedures, Continued

Title 14 Checklist Utilize this checklist when processing Title 14 mobilizations.

Checklist For Title 14 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Required at beginning of mobiliza-tion	Reserve Orders in Direct Access. Note: These instructions are not intended to be all inclusive. See the Direct Access Online User Guide for detailed instructions Be sure the transaction shows the following. Orders Start Date: This is the date the reservist leaves his/her home to travel to the mobilization site. Under the Reserve Specific Info tab: • Purpose = Invol Active Duty, Title 14 • Payment for Duty = Pay and Allowances • Payment for Travel = Select either Single or Multiple • Days of ADT-At requirement satisfied by these orders = • Select Partial Entitlements Under the Reserve Orders Tab: • Purpose= Not required. Select entry as desired. • Order Begin Dt and Order End Dt = Dates of mobilization period including any delay enroute. • Select the Contingency Operation option Under the Partial Entitlements Tab: • Select the appropriate entitlements.	Direct Access Guide, Reserve Orders
Optional	If member is ordered to active duty from an OUTCONUS residence and entitled to OUTCONUS COLA, two transactions shall be submitted: • Start OUTCONUS COLA transaction at beginning of active duty period. • Stop OUTCONUS COLA transaction at end of active duty period.	Direct Access Guide OUTCONUS COLA w/Depns or OUTCONUS COLA with out/Depns

Continued on the next page.

SPO Mobilization Procedures, Continued

Checklist For Title 14 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Optional	If member meets the requirements prescribed on Pages 11-10 and 11-11 of this chapter, the below pay entitlements shall be started at the beginning of the active duty period, and stopped at the end of the active duty period. • Career Sea • Diving Duty Pay • Imminent Danger Pay • Combat Tax Exclusion • Special Duty Assignment Pay • Crew/Non-crew Flight Pay • Flight Deck Hazardous Duty Incentive Pay • Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams	Direct Access Guide, Entitlements ALSPOs D03 and F/03
Optional	Start FSSA (Family Subsistence Supplement Allowance) Submit application to PSC (MAS).	PPPM, 7-B-8
Optional	Board Certified Pay for Physician Assistants. If member meets the requirements prescribed on page 11-10 of this chapter, fax copy of orders to PSC (MAS) at 785-339-3760.	PAYMAN, 4.J.2,
Optional	Change in Dependency/Emergency Data if the member has a change in dependents or beneficiaries.	Direct Access Guide, Dependency/ Emergency Data

Recall of Retired Members

Introduction

During a mobilization, reserve retirees may be called to active duty. This includes both retired with pay (RET-1) and retired awaiting pay at age 60 (RET-2). The process/procedures for mobilizing recalled reserve retirees are described below

Process

This is the process for recalling a reserve retiree.

Stage	Who does it	What Happens
1	CG Personnel Command (rpm) / (opm) / (epm)	Issues recall from retirement orders. Coordinates travel needs with the recalled member.
2	Member	Reports for mobilization duty. Prepares travel claim.
3	Unit	Reports member aboard for mobilization. Arranges for member to be issued active duty ID card and Dependent Application. If reaches 60 prior to end of orders submit Age Waiver Request to COMDT (G-WTR-1) as soon as possible.
4	SPO	Prepares Direct Access transactions to record the recall from retirement.
5	PSC (RAS)	If retired with pay (RET-1), stops retired pay. If retired awaiting pay at age 60 (RET-2), prepares transactions to transfer the member out of RET-2 status.
6	Member	Enters mailing address, emergency contact and direct deposit information in Direct Access. (If access to the CG intranet is unavailable, requests that SPO input.)
7	PSC (TVL)	Processes travel claims and requests for travel advances.
8	SPO / PSC (MAS) / (RAS)	Maintains pay and leave accounts during mobilization.
9	Unit	Ensures member is physically qualified for demobilization.
10	Reservist Member	Notifies Unit and SPO of desires concerning disposition of accrued leave (at least 50 days prior to demobilization unless exigent circumstances exist).
11	SPO	Inputs Statement of Intent in Direct Access (at least 45 days prior to demobilization unless exigent circumstances exist).
12	SPO	Prepares Certificate of Release or Discharge from Active Duty (DD-214) and mails to unit.

Continued on next page

Recall of Retired Members, Continued

Process (cont'd)

Stage	Who does it	What Happens
13	Unit	Delivers demobilization documents (DD-214 and instructions to file travel claim). Notifies SPO if uncollected CG Mutual Assistance loan(s) need to be collected from final active duty pay.
14	SPO	Prepares Direct Access transactions to record release from active duty (RELAD). E-mails PSC-RAS and PSC-MAS notifying completion of recall, including effective date of last day of active service.
15	PSC (SES)	Processes final active duty payment. Collects CG Mutual Assistance debts if requested.
16	PSC (RAS)	If retired with pay (RET-1) or reached 60th birthday during mobilization, starts/restarts retired pay. If retired awaiting pay at age 60 (RET-2), prepare transactions to transfer back to RET-2 status.

Recall of Retired Members, Continued

Mobilization Checklist

The unit shall follow the mobilization checklist on page 11-**22** of this chapter.

SPO Procedures

The SPO shall prepare the following transactions to record recall of a retired reserve under Title 10:

Checklist For Title 10 Mobilization Of Recalled Retiree		
Required/ Optional	**Transaction / Input**	**Reference**
Required	Direct Access Recruit Workforce Transaction: Complete the following transactions in Direct Access the instructions in the Directed Access reference for processing a "Rehire" transaction. • Applicant Data Transaction • Identification Data Transaction • Applicant Contract Data Transaction • Complete PCS Departing/Reporting only if there was delay enroute. • Note: The PCS Departing/Reporting transaction is input and processed by the assignment officer. SPOs will need to modify the transaction only if authorized delay was required to report to PCS unit.	Direct Access Online User Guide
Required	Send an E-Mail to PSC-MAS and PSC-RAS providing: • Name, Rank, and SSN of recalled retiree • Effective date and period of recall • TONO under which the recall is being effected • Reference the letter/message from CGPC (rpm)/(opm)/(epm) which authorizes the recall.	PPPM, Sections 3-A-4 and 3-A-5,
The SPO shall also prepare the transactions prescribed on pages 11-25 thru 11-27 of this chapter, with the following exceptions: (1) The **Reserve Orders transaction** on page 11-25 shall not be prepared. (2) The last six transactions on page 11-27 are *required* transactions for a recalled retiree.		
PSC (MAS) / (RAS) will process pay for members recalled from retirement for short-term periods under Title 14.		

Travel Claims During Mobilization Status

Introduction

Members submit travel claims to be reimbursed for travel, lodging, meals, and incidental expenses.

Reference

(a) The Travel Claim Quick Reference Guide, available on-line at http://www.uscg.mil/hq/PSC/, provides assistance in preparing travel claims.

Methods for Submitting Travel Claims

Travel claims may be submitted by 2 methods:

- Unit Travel System (UTS) – the preferred method.
- Hardcopy DD Form 1351-2.

Supporting Documentation

Travel claims shall be supported by the documentation listed below:

- Original itemized receipt for lodging expenses
- Original receipts for transportation expenses (airline, rental car, etc.)
- Any original receipts for reimbursable expenses required by the Joint Federal Travel Regulations (JFTR) – Volume 1 – generally, any expense that is $75.00 or more.

On UTS claims, this documentation shall be provided to the approving official; for manually submitted claims, this documentation shall be sent to PSC (TVL) with DD Form 1351-2.

Recording of Leave Taken

Members shall indicate all leave days used on the TDY travel claim. The leave shall be indicated as follows:

- In UTS, on the Itinerary and Exceptions-To-Daily-Expense screens. See sample on pages 11-35 thru 11-37.
- On DD Form 1351-2, in Block 29 (Remarks) on page 2.

Note: (1) Do not start or end a UTS claim in a leave status.

(2) Mobilized reservists are entitled to Per Diem for lodging while on leave.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample UTS Travel Claim – Leave Taken

UTS FILE NO. 27472

TRAVEL VOUCHER OR SUBVOUCHER

Read privacy act statement, penalty statement and instructions on back before completing form. Use typewriter ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed continue in Remarks.

1. PAYMENT REQUIRED BY (X one): [X] Electronic Funds Transfer (EFT) [ ] Payment By Check; Split Disbursement: Amt to Govt. Tvl Charge Card $

2. TYPE OF PAYMENT (X as applicable): [X] TDY [X] Member/Employee [ ] PCS; [ ] Other [ ] Dependent(s) [ ] DLA

FOR D.O. USE ONLY
3. D.O. VOUCHER NUMBER

4. NAME (Last, First, Middle Initial) (print or type): PERFORMANCE, STELLA R
5. GRADE: E6
6. SSN: 987-65-4321
SUBVOUCHER NUMBER

7. ADDRESS a. NUMBER AND STREET: 12 ELM STREET
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66609
c. PAID BY

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-339-2250
9. TRAVEL ORDER NUMBER: 1303000003374000
10. PREVIOUS GOVERNMENT PAYMENT /ADVANCES (Do not include ATM Advances)

11. ORGANIZATION AND STATION: 5347400 - CG HUMAN RESOURCES SERVICE & INFORMATION CTR

12. DEPENDENTS (X and complete as applicable): [ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME (Last, First, Middle Initial)	b. RELATIONSHIP	c. Date of Birth or Marriage

13. DEPENDENTS ADDRESS ON RECEIPT of ORDERS (include Zip Code)

14. Have Household Goods Been Shipped? (X one) [ ] YES [ ] NO (Explain in Remarks)

d. COMPUTATIONS

15. ITINERARY

a. DATE 02		b. PLACE (home,office,base,activity,city and state,city and country, etc.)	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
11/1	DEP	SAINT LOUIS ; MISSOURI	PA			
11/1	ARR	TOPEKA ; KANSAS;		TD		270
11/10	DEP	TOPEKA ; KANSAS	CA		63.00	
11/10	ARR	LAWRENCE ; KANSAS;		LV		0
11/13	DEP	LAWRENCE ; KANSAS	CA		0.00	
11/13	ARR	TOPEKA ; KANSAS;		TD		0
11/30	DEP	TOPEKA ; KANSAS	GA		63.00	
11/30	ARR	TOPEKA ; KANSAS;		MC		0
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT
(1) Per diem
(2) Actual Expenses Allowance
(3) Mileage
(4) Dependent Travel
(5) DLA
(6) Reimbursable Expenses
(7) Total
(8) Less Advance
(9) Amount Owed
(10) Amount Due

16. POC TRAVEL (X one) [X] OWN/OPERATE [ ] PASSENGER

DURATION OF TDY TRAVEL: [ ] 12 HOURS OR LESS; [ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS; [X] MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
11/1/02	AUTO MILEAGE	360 MI	360 MI
11/1/02	TOLLS	2.20	2.20
11/1/02	LAUNDRY SERVICES	60.00	60.00
11/1/02	PARKING	30.00	30.00
11/1/02	LODGING TAX-CONUS/US TERR	240.00	240.00
11/1/02	LODGING/TONO-2-TONO TRANSI	63.00	63.00
11/1/02	PER DIEM (25%) TONO-TO-TON	7.50	7.50

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS
	(SEE DAILY EXPENSES)		

20.a. CLAIMANT SIGNATURE: STELLA R PERFORMANCE
b. DATE: 01/06/2003
21.a. APPROVING OFFICER SIGNATURE: NOT YET APPROVED
b. DATE

22. ACCOUNTING CLASSIFICATION: 2 3 301 132300 EC 51282 2151

23. COLLECTION DATA

24. COMPUTED BY | 25. AUDITED BY | 26. Travel Order Posted by | 27. RECEIVED (Payee Signature and Date or Check No.) | 28. AMOUNT PAID

UTS GENERATED FORM 1351-2, AUG 1997 (EG)

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample UTS Travel Claim – Leave Taken

PRIVACY ACT STATEMENT

AUTHORITY: 5 USC 5701, 37 USC 404-427, and EO 9397.

PRINCIPAL PURPOSE(S): Used for reviewing, approving, accounting and disbursing for official travel. SSN is used to maintain a numerical identification system for individual claims.

ROUTINE USE(S): To substantiate claims for reimbursement for official travel.

DISCLOSURE: Voluntary; however, failure to furnish information requested may result in total or partial denial of amount claimed.

PENALTY STATEMENT

There are severe criminal and civil penalties for knowingly submitting a false, fictitious, or fraudulent claim (U.S. Code, Title 18, Section 287 and 1001 and Title 31, Section 3729).

INSTRUCTIONS

ITEM 1 - PAYMENT
Member must be on electronic funds (EFT) to participate in split disbursement. Split disbursement is a payment method by which you may elect to pay your official travel card bill and forward the remaining settlement dollars to your predesignated account. For example: $250.00 in the "Amount to Government Travel Charge Card" block means that $250.00 of your travel settlement will be electronically sent to the charge card company. Any dollars remaining on this settlement will automatically be sent to your predesignated account. Should you elect to send more dollars than you are entitled, "all" of the settlement will be forwarded to the charge card company. Notification: you will receive your regular monthly billing statement from the Government Travel Charge Card contractor, it will state: paid by Government $250.00, 0 due. If you forwarded less dollars than you owe, the statement will read as: paid by Government, $250.00, $15.00 now due. Payment by check is made to travelers only when EFT payment is not directed.

USCG TRAVEL PAYMENT STATUS AND DEBT/OVERPAYMENT COLLECTION
- When Industrial Site accounting used - contact the accounting office that funded travel.
- For all others - contact the CG Finance Center at 1-800-564-5504 and follow the prompts. For personal assistance and instructions for repayments or rescheduling of travel debts call (757) 523-6940. A Due Process debt notification letter w/instructions will be sent to you.
- If no payment status is indicated call HRSIC Travel at 1-888-USCG-TVL.

REQUIRED ATTACHMENTS FOR TRAVEL VOUCHER AUDIT SUBMISSIONS
Claims will be audited based on a random sampling plan or because the net entitlement of the travel equaled or exceeded $2,500.00.
Assemble your claim as follows:
1. (Top) Travel Voucher, Continuation Page, and Daily Expense Record, DOD or UTS record.
2. Original of all travel orders and amendments, as applicable.
3. Dependent and/or other family member travel authorizations or claim documentation.
4. Required Receipts: Hotel/motel receipts and any item of expense claimed in the amount of $75.00 or more. (Ticketless Travel records require a method of purchase statement).
When directed, submit the above in an envelope addressed to HRSIC (TVL) marked "Audit".

ITEM 15. ITINERARY - SYMBOLS
15c. MEANS/MODE OF TRAVEL (Use two letters)

GTR/TKT	- T	Automobile	- A
Government Transportation	- G	Motorcycle	- M
Commercial Transportation		Bus	- B
(Own Expense)	- C	Plane	- P
Privately Owned		Rail	- R
Convenience (POC)	- P	Vessel	- V
Alaska Ferry System	- AF		
Change Status	- CS		

15d. REASON FOR STOP

Authorized Delay	- AD	Change of Home Port	- HP
Awaiting Transportation	- AT	Leave En Route	- LV
Continuous OS Travel	- CT	Mission Complete	- MC
Designated Location	- DL	Pick Up Passengers	- PP
Drop Off Passengers	- DP	Pick Up Vehicle	- PV
Drop Off Vehicle	- DV	Sick Leave	- SL
Enroute Stop Over	- ES	Temporary Duty	- TD
House Hunting	- HH	Voluntary Return	- VR

15e. LODGING COST
UTS requires the entry of the per-day (daily) cost of Lodging. Place and claim INCONUS lodging taxes in the reimbursable expense section.

ITEM 19 - DEDUCTIBLE MEALS
Use the UTS "Exception" button to enter deductible meals. Meals consumed by a member when furnished with or without charge incident to an official assignment by sources other than a government mess (see JFTR, par. U4125-A3g and JTR, par. C4554-B for definition and deductible meals). Meals furnished on commercial aircraft or by private individuals are not considered deductible meals.

29. REMARKS

EMPLOYEES: INDICATE DATES ON WHICH LEAVE TAKEN FOR MORE THAN ONE-HALF OF PRESCRIBED DAILY WORKING HOURS

UNIFORMED MEMBERS: INDICATE DATES ON WHICH LEAVE WAS TAKEN

Receipts Required:

HOTEL RECEIPT(S) FOR TOPEKA ; KANSAS

UTS GENERATED FORM 1351-2 (BACK), AUG 1997

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample UTS Travel Claim – Leave Taken

TRAVEL VOUCHER OR SUBVOUCHER
(Daily Expenses)

PAGE 3 OF 3 PAGES

4. NAME (Last, First, Middle Initial)
PERFORMANCE, STELLA R

Date	Day Type	Daily Lodging	Computed Meal Types Br	Lu	Dn	Claimed Meal Types Br	Lu	Dn	Actual Expenses Claimed Br	Lu	Dn	Inc
11/01/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/02/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/03/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/04/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/05/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/06/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/07/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/08/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/09/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/10/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/11/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/12/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/13/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/14/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/15/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/16/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/17/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/18/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/19/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/20/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/21/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/22/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/23/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/24/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/25/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/26/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/27/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/28/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/29/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/30/2002	LDP	0.00	CM	CM	CM	CM	CM	CM				

Day Types
LDP = Lodging Plus, OB = OnBoard Ship, FD = Field Duty, SD = Sea Duty, LV = Leave, AE = Actual Expense, AELP = Actual Expense/Meals LDP
GRP = Group Travel, FLT = Flat Per Diem, RED = Reduced Per Diem, AF = Alaskan Ferry, NP = No Per Diem, SAE = 300 % AE, SAELP = 300 % AELP

Continued on next page

Travel Claims During Mobilization Status, Continued

Liquidation of Advance Funds

Advances are to be claimed for the same travel period as they are received.

Advance funds are recorded on the travel claim in the block entitled "Previous Government Payments/Advances" (Block 9 in UTS; block 10 for manual claims).

ONLY electronic deposit advances (PSC processed), or advances made in the form of traveler's checks are to be reported on the travel claim. DO NOT report prior settlement payments or cash advances from credit cards.

If an advance of funds has been requested/processed through UTS for a specific TONO, it is already posted. DO NOT place this advance on a UTS settlement as the UTS system automatically applies this to the settlement and deducts from total reimbursable entitlement(s).

Special Procedures For Long-Term Mobilization Status

For members on long-term mobilization orders, who are entitled to per diem, it is beneficial to file a travel claim every 30 days. For a travel claim to be properly processed each 30 days, it is necessary that the orders be designated as Document Type 13 (Blanket TDY Orders) and not Document Type 11 (Standard TDY Orders) and submitted as a new claim each time.

The first travel claim under blanket orders should be filled out normally, except the traveler should request the additional Reserve Continued Lodging and the 25% per diem for the last day of the claim in block 18 (reimbursable expenses). See sample on page 11-39.

Continued on next page

Travel Claims During Mobilization Status, Continued

Special Procedures For Long-Term Mobilization Status

Subsequent claims under blanket orders should be completed as follows:

- On the first line of block 15b, enter: "Continuation of Recall" with the location of the TDY site.
- In block 18, claim reimbursement for the additional 25% per diem for the first and last day of the claim.

Example: Claim was from 4/04/01 through 05/04/01. Reservist would claim reimbursement for the additional 25% per diem for 04/04/01 and 05/04/01.

See sample on page 11-40.

For the last claim filed under the blanket orders, on the first line of block 15b, enter: "Continuation of Recall". In block 18, request reimbursement for the additional 25% per diem for the first day of this claim. See sample on page 11-41.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample Travel Claim – (Claim 1) Long Term Mobilization Status with split TONOs

TRAVEL VOUCHER OR SUBVOUCHER

Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.

1. PAYMENT
[ ] Electronic Fund Transfer (EFT) [ ] Payment by Check
Split Disbursement: Amt to Govt Tvl Charge Card $

2. TYPE OF PAYMENT *(X as applicable)*
[X] TDY [ ] Member/Employee [ ] PCS
[ ] Other [ ] Dependent(s) [ ] DLA

3. FOR D.O. USE ONLY
a. D.O. VOUCHER NUMBER
b. SUBVOUCHER NUMBER
c. PAID BY
d. COMPUTATIONS

4. NAME *(Last, First, Middle Initial) (Print or type)*: SMITH, JOHN D
5. GRADE: E7
6. SSN: 123456789

7. ADDRESS. a. NUMBER AND STREET: 444 SE QUINCY ST
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66683

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-555-1234
9. TRAVEL ORDER NUMBER: 1302XXXXXXXXX000
10. PREVIOUS GOVERNMENT PAYMENTS/ ADVANCES: NON ELECTRONIC ADVANCE $ AMOUNT PLACED HERE
11. ORGANIZATION AND STATION: CG HRSIC

12. DEPENDENT(S) *(X and complete as applicable)*
[ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME *(Last, First, Middle Initial)*	b. RELATIONSHIP	c. DATE OF BIRTH OR MARRIAGE

13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS *(Include Zip Code)*

14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? *(X one)* [ ] Yes [ ] No *(Explain in Remarks)*

15. ITINERARY

a. DATE 2002		b. PLACE *(Home, Office, Base, Activity, City and State, City and Country, etc.)*	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
1/01	DEP	TOPEKA, KS (SHAWNEE)	CP			
1/01	ARR	MANHATTAN, NY(COUNTY)		TD	120.00	70
1/09	DEP		CA			
1/09	ARR	BOSTON, MA (COUNTY)		MC		
1/14	DEP		CA			
1/14	ARR	MANHATTAN, NY (COUNTY)		TD	120.00	
1/31	DEP		CP			
1/31	ARR	CONTINUATION OF RECALL		MC		
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT

(1) Per Diem	
(2) Actual Expense Allowance	
(3) Mileage	
(4) Dependent Travel	
(5) DLA	
(6) Reimbursable Expenses	
(7) Total	
(8) Less Advance	
(9) Amount Owed	
(10) Amount Due	

16. POC TRAVEL *(X one)* [X] OWN/OPERATE [ ] PASSENGER

17. DURATION OF TDY TRAVEL
[ ] 12 HOURS OR LESS
[ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS
[X] MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
1/09/02	25% PERDIEM	11.25	11.25
1/14/02	25% PERDIEM	11.25	11.25
1/31/02	25% PERDIEM	11.25	11.25
1/31/02	LODGING TAX	396.00	396.00
1/09-13	DUAL LODGING	600.00	600.00
1/01/02	AIRFARE	375.00	375.00
1/01/02	AIRFARE SVC FEE	35.00	35.00
1/31/02	LAUNDRY ($2/DAY)	62.00	62.00
1/31/02	TONO-TONO LODGING	120.00	120.00

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS

20.a. CLAIMANT SIGNATURE | **b. DATE** | **c. SUPERVISOR SIGNATURE** | **d. DATE**

21.a. APPROVING OFFICER SIGNATURE | **b. DATE**

22. ACCOUNTING CLASSIFICATION
This example is a manual claim of Beginning Recall, Mbr TAD is sent TAD under seperate tono, dual lodging, and how to show continuation of recall. Mileage is for the trip to airport.

23. COLLECTION DATA

24. COMPUTED BY	25. AUDITED BY	26. TRAVEL ORDER POSTED BY	27. RECEIVED *(Payee Signature and Date or Check No.)*	28. AMOUNT PAID

DD FORM 1351-2, MAR 2000 PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1 MAY BE USED UNTIL SUPPLY IS EXHAUSTED Exception to SF 1012 approved by GSA/IRMS 12-91.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample Travel Claim – (Claim 2) Long Term Mobilization Status with split TONOs

TRAVEL VOUCHER OR SUBVOUCHER

Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.

1. PAYMENT
[ ] Electronic Fund Transfer (EFT) [ ] Payment by Check
[ ] Split Disbursement: Amt to Govt Tvl Charge Card $ _____

2. TYPE OF PAYMENT *(X as applicable)*
[X] TDY [ ] Member/ Employee [ ] PCS
[ ] Other [ ] Dependent(s) [ ] DLA

3. FOR D.O. USE ONLY
a. D.O. VOUCHER NUMBER

4. NAME *(Last, First, Middle Initial) (Print or type)*: SMITH, JOHN D
5. GRADE: E7
6. SSN: 123456789
b. SUBVOUCHER NUMBER

7. ADDRESS. a. NUMBER AND STREET: 444 SE QUINCY ST
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66683
c. PAID BY

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-555-1234
9. TRAVEL ORDER NUMBER: 1102XXXXXXXXX000
10. PREVIOUS GOVERNMENT PAYMENTS/ ADVANCES: NON ELECTRONIC ADVANCE $ AMOUNT PLACED HERE
11. ORGANIZATION AND STATION: CG HRSIC

12. DEPENDENT(S) *(X and complete as applicable)*
[ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME *(Last, First, Middle Initial)*	b. RELATIONSHIP	c. DATE OF BIRTH OR MARRIAGE

13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS *(Include Zip Code)*

14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? *(X one)* [ ] Yes [ ] No *(Explain in Remarks)*

d. COMPUTATIONS

15. ITINERARY

a. DATE 2002		b. PLACE *(Home, Office, Base, Activity, City and State; City and Country, etc.)*	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
1/10	DEP	MANHATTAN, NY (COUNTY)	CA			
1/10	ARR	BOSTON, MA (COUNTY)- TAD		TD	159.00	
1/13	DEP	WITHIN TAD UNDER SEP TONO	CA			
1/13	ARR	MANHATTAN, NY (COUNTY) -		MC		
	DEP	CONT UNDER SEP TONO				
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT

(1) Per Diem	
(2) Actual Expense Allowance	
(3) Mileage	
(4) Dependent Travel	
(5) DLA	
(6) Reimbursable Expenses	
(7) Total	
(8) Less Advance	
(9) Amount Owed	
(10) Amount Due	

16. POC TRAVEL *(X one)* [X] OWN/OPERATE [ ] PASSENGER

17. DURATION OF TDY TRAVEL
[ ] 12 HOURS OR LESS
[ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS
[X] MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
1/10/02	25% PERDIEM	12.50	12.50
1/13/02	25% PERDIEM	12.50	12.50
1/13/02	LODGING TAX	69.96	69.96
1/13/02	TONO-TONO LODGING	159.00	159.00
1/13/02	RENTAL CAR	227.59	227.59
1/13/02	RENTAL FUEL	27.00	27.00

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS

20.a. CLAIMANT SIGNATURE
b. DATE
c. SUPERVISOR SIGNATURE
d. DATE

21.a. APPROVING OFFICER SIGNATURE
b. DATE

22. ACCOUNTING CLASSIFICATION
This is an example of a manual claim for the second TAD taken while in a TAD status under a seperate Tono.

23. COLLECTION DATA

24. COMPUTED BY	25. AUDITED BY	26. TRAVEL ORDER POSTED BY	27. RECEIVED *(Payee Signature and Date or Check No.)*	28. AMOUNT PAID

DD FORM 1351-2, MAR 2000 PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1 MAY BE USED UNTIL SUPPLY IS EXHAUSTED Exception to SF 1012 approved by GSA/IRMS 12-91.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample Travel Claim – (Claim 3) Long Term Mobilization Status with split TONOs

TRAVEL VOUCHER OR SUBVOUCHER

Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.

1. PAYMENT
[ ] Electronic Fund Transfer (EFT) [ ] Payment by Check
[ ] Split Disbursement: Amt to Govt Tvl Charge Card $ _____

2. TYPE OF PAYMENT *(X as applicable)*
[X] TDY [ ] Member/ Employee [ ] PCS
[ ] Other [ ] Dependent(s) [ ] DLA

3. FOR D.O. USE ONLY
a. D.O. VOUCHER NUMBER

4. NAME *(Last, First, Middle Initial) (Print or type)*: SMITH, JOHN D

5. GRADE: E7

6. SSN: 123456789

b. SUBVOUCHER NUMBER

7. ADDRESS. a. NUMBER AND STREET: 444 SE QUINCY ST
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66683

c. PAID BY

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-555-1234

9. TRAVEL ORDER NUMBER: 1302XXXXXXXXX000

10. PREVIOUS GOVERNMENT PAYMENTS/ ADVANCES
NON ELECTRONIC ADVANCE
$ AMOUNT PLACED HERE

11. ORGANIZATION AND STATION: CG HRSIC

12. DEPENDENT(S) *(X and complete as applicable)*
[ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME *(Last, First, Middle Initial)*	b. RELATIONSHIP	c. DATE OF BIRTH OR MARRIAGE

13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS *(Include Zip Code)*

14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? *(X one)* [ ] Yes [ ] No *(Explain in Remarks)*

d. COMPUTATIONS

15. ITINERARY

a. DATE 2002		b. PLACE *(Home, Office, Base, Activity, City and State; City and Country, etc.)*	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
2/01	DEP	CONTINUATION OF RECALL	CP			
2/01	ARR	MANHATTAN, NY(COUNTY)		TD	120.00	
2/10	DEP		CP			
2/10	ARR	TOPEKA, KS (SHAWNEE)		LV		
2/18	DEP		CP			
2/18	ARR	MANHATTAN, NY (COUNTY)		TD	120.00	
2/28	DEP		CP			
2/28	ARR	TOPEKA, KS (SHAWNEE) END		MC		
	DEP	OF RECALL				
	ARR					
	DEP	.				
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT

(1) Per Diem	
(2) Actual Expense Allowance	
(3) Mileage	
(4) Dependent Travel	
(5) DLA	
(6) Reimbursable Expenses	
(7) Total	
(8) Less Advance	
(9) Amount Owed	
(10) Amount Due	

16. POC TRAVEL *(X one)* [X] OWN/OPERATE [ ] PASSENGER

17. DURATION OF TDY TRAVEL
[ ] 12 HOURS OR LESS
[ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS
[X] MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
2/01/02	25% PERDIEM	11.25	11.25
2/10/02	LODGING	120.00	120.00
2/28/02	LODGING TAX	250.80	250.80
2/28/02	AIRFARE	275.00	275.00
2/28/02	AIRFARE SVC FEE	35.00	35.00
2/28/02	LAUNDRY ($2*21 DAYS)	42.00	42.00

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS

20.a. CLAIMANT SIGNATURE | b. DATE | **c. SUPERVISOR SIGNATURE** | d. DATE

21.a. APPROVING OFFICER SIGNATURE | b. DATE

22. ACCOUNTING CLASSIFICATION
Manual claim example showing cont of recall, how to annotate LV within claim, and end of recall. Mbr must show last day of work as 1st day of leave to be paid perdiem for work day.

23. COLLECTION DATA

24. COMPUTED BY | **25. AUDITED BY** | **26. TRAVEL ORDER POSTED BY** | **27. RECEIVED** *(Payee Signature and Date or Check No.)* | **28. AMOUNT PAID**

DD FORM 1351-2, MAR 2000 PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1 MAY BE USED UNTIL SUPPLY IS EXHAUSTED Exception to SF 1012 approved by GSA/IRMS 12-91.

Continued on next page

Travel Claims During Mobilization Status, Continued

Special Procedures for Overlapping TDY Periods

Mobilized members on temporary duty (TDY) may be issued a second set of TDY orders to another location. This results in overlapping TDY periods involving multiple TONO(s) and requires special procedures.
Members with overlapping travel TONO's need to submit multiple travel claims.

Example:
A member has TDY orders for period 1/1/02 to 2/28/02 in New York City. The member has commercial lodging and messing.

The member is sent TDY to Boston from 1/10/02 to 1/13/02. The member is required to procure commercial lodging in Boston and maintain the lodging in New York City.

Upon completion of the Boston TDY period, the member returns to New York to complete the original TDY period.

This member will need to submit *3 separate travel claims* as detailed on the next page.

Continued on next page

Travel Claims During Mobilization Status, Continued

Special Procedures for Overlapping TDY (cont'd)

First Claim. The first claim will be submitted to cover the period 1/1/02 to 1/9/02. The claim should be submitted as Mission Complete (MC). The member needs to claim the additional 25 percent of M&IE for 1/9/02 as a Reimbursable item (under the Reimbursable Expenses Column in UTS, or in Block 18 of DD Form 1351).

Second Claim. The second claim will cover the TDY period to Boston and return trip to New York City. With the exception of the Reimbursable Expenses Block in UTS, or Block 18 of DD Form 1351-2, this claim will be submitted as any other claim. In the Reimbursable Expenses Block in UTS, or Block 18 of DD Form 1351-2, the member needs to claim the additional 25 percent M&IE for the first and last days of travel, in this case 1/10/02 and 1/13/02.

Third Claim. The third claim will be submitted for the period of TDY upon return to New York. The member will need to claim the additional 25 percent per diem for 1/14/02 in the Reimbursable Expenses Block in UTS, or Block 18 of DD Form 1351-2. In addition, if the member is required to procure or maintain quarters at both locations, the member could be entitled to dual lodging. In this case, the member needs to claim the lodging costs for maintaining the New York quarters during the Boston TDY period as dual lodging in the Reimbursable Expenses Block in UTS, or Block 18 of DD Form 1351-2. The member's TDY orders to New York will have to be amended to authorize dual lodging. The amendment to authorize dual lodging must be location and date specific.

Monthly Verification Procedures

Introduction

Mobilized members are required to review and validate their monthly Leave and Earnings Statement (LES). Units are required to validate a roster of mobilized members each month.

Validation of LES's

Members have the responsibility to review their LES each month and report any discrepancies via the chain of command. The member must report any instance where:

- The LES shows a pay entitlement to which the member is not entitled (under pages 11-7 through 11-15 of this chapter).
- The member continues to be paid pay and allowances after being released from active duty.

Members who are overpaid pay and allowances will be required to repay such overpayments, plus interest. Any overpayments will be collected in lump sum from a member's final separation pay, and from future ADT or IDT earnings to which the member is entitled after release from active duty.

Unit Verification of Mobilized Reservists

Units shall maintain a monthly roster of recalled members to ensure those members are timely removed from a mobilization status and not overpaid.

Extension of Mobilization Orders

Introduction

A mobilized member's orders may be extended by the ISC (pf).

Procedure

If a member's orders are extended, the ISC (pf) shall notify the member and the servicing SPO.

The SPO or ISC (pf) shall amend and sign the member's original hard copy orders to reflect the new expected Order End Date. A copy must be provided to the member to facilitate employer notification. The member's command should issue the employer notification letter (from Step 1 of the Checklist for Mobilization) when a member's orders are extended or new orders are issued.

The Servicing SPO shall record the extension in Direct Access as follows:

If	Submit	Reference
Reservist is extended under Involuntary Title 10 orders	Modify the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date. Note: This process is used only if amending the end date of the original orders and there is no change in the member's status.	Direct Access Guide
Reservist is extended under Voluntary Title 10 orders	Modify the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date. Note: This process is used only if amending the end date of the original orders and there is no change in the member's status. If the status changes, e.g. Title 10 to EAD a new set of orders must be created.	Direct Access Online User Guide ALPERSRU P/03
Reservist is released from Title 10 orders and immediately placed, under a different set of orders, on further active duty for a period of 140 days or greater	Process a new set of Reserve Orders in Direct Access to record the new reserve period. The new orders must have an effective date of the day after release from Title 10 orders. Change BAH transaction. If the member will not be assigned government quarters, be sure the transaction shows a BAH Postal Code of the member's duty station locale (not the postal code of the member's principal place of residence). Change INCONUS COLA transaction. Be sure the transaction shows a Postal Code of the member's duty station locale (not the postal code of the member's principal place of residence).	Direct Access Guide ALPERSRU P/03 Direct Access Guide, BAH Direct Access Guide, COLA

Continued on next page

Extension of Mobilization Orders, Continued

If	Submit	Reference
Reservist is released from Title 10 orders and immediately placed on active duty under a different set of orders for a period of less than 140 days	Follow the Demobilization release from active duty procedures on page 11-50. Process a new set of Reserve Orders in Direct Access to record the new reserve period. The new orders must have an effective date of the day after release from Title 10 orders **Note:** Since the new set of orders is for less than 140 days, the member will be entitled to BAH-II during these orders. The reservist continues to earn leave while on such further active duty, even if the follow-on active duty period is for less than 30 days. This is because the reservist has remained on consecutive active duty.	Direct Access Guide

The Demobilization Process

Introduction The demobilization process depends on communication between several participants. This process is broken down into stages identifying what needs to be completed and who is responsible.

Reference: (a) ALCOAST 349/04

Release Site Per, Chapter 6.C.1(a) of CG Manpower Mobilization Support Plan, COMDTINST M3061.1, recalled reservists shall be RELAD at the same site at which they were initially ordered to report. Exceptions may be granted on a **'case-by-case'** basis. ISC (pf)s shall be the approving level for these exceptions as requested by units.

Process This table describes the process.

When	Who does it	What Happens
Member is identified for demobilization	Mobilization Unit	Coordinates demobilization and transfer to unit from which the member was initially ordered to report (RELAD Unit) with ISC (pf) and SPO. • Ensures member is physically qualified for demobilization. • Notifies SPO if the member has uncollected CG Mutual Assistance loan(s) that need to be collected from final active duty pay. Coordinates repayment plan with CGMA headquarters if lump-sum deduction from member's final pay is not appropriate.
	Member	Completes Career Intentions Worksheet (CG PSC-2045) to denote desires concerning disposition of accrued leave. Forwards to Mobilization Unit Servicing SPO.
	Mobilization Unit (or servicing SPO if unit has limited administrative capabilities)	Records in Direct Access any medals/awards/competencies earned by the member while in a mobilization status.

Continued on next page

The Demobilization Process, Continued

Process (cont'd)

When	Who Does it	What Happens
Upon receipt of Career Intentions Worksheet from member	SPO For Mobilization Unit	Inputs Statement of Intent in Direct Access at least 45 days prior to Demobilization or member's scheduled departure date on terminal leave. **Note:** Use Career Intentions Reason -- 'SELRES Deactivation'.
Member transfers to RELAD Unit		Forwards SPO PDR back to the SPO of the member's regularly assigned unit RELAD Unit.
At least 30 days prior to demobilization	Member	Updates mailing/e-mail address (and bank account information if changing) in Direct Access. (If access to the internet is unavailable, unit or SPO will input mailing address/direct deposit information.)
At least 15 days prior to demobilization	SPO for RELAD Unit	Prepares, Personnel Data Information File (PDIF) and Certificate of Release or Discharge from Active Duty (DD-214) and mails to unit for delivery to member.
Upon Receipt from SPO	Member, with assistance of Unit	Verifies information on PDIF (competencies, awards, etc.), and DD-214, notifies SPO of any discrepancies.
Date of release from active duty	RELAD Unit	Delivers the Certificate of Release or Discharge From Active Duty (DD-214) and instructions for filing the final travel claim to the member. Mails member's medical record back to member's regularly assigned unit.
Date of release from active duty or Date of departure on terminal leave	SPO for RELAD Unit	Transmits separation transactions as prescribed on pages 11-49 and 11-50.
Date of release from active duty	PSC (SES)	If SPO submits SOI as prescribed in this section, then JUMPS will automatically pay the member their final active duty pay on the payday following their demobilization date. If not, then PSC (SES) will have to manually calculate and process the final active duty payment.

Demobilization Checklist

Introduction

This checklist provides a job aid to assist the unit in completing the necessary tasks required for separating a mobilized reservist from active duty. It should be used along with the Checklist for Separations and the Checklist for RELAD in section 3-B of this manual.

Checklist

Action when releasing a reservist from active duty:

Step	Action	Date
1	Ensure member is physically qualified for release from active duty. A physical examination is required if one has not been done within the past 12 months. If one has been done within 12 months, a Health Screening Assessment (DD Form 2697) is required. Ensure all medical problems are documented in the member's health record, and that a line of duty determination is made if there is a medical problem. Ensure compliance with the Post-Deployment Health Assessment Program IAW ALCOAST 245/03	
2	Ensure member has notified SPO of desires concerning disposition of accrued leave via completion of a Career Intentions Worksheet (CG PSC-2045).	
3	Verify that member (and dependents) have the appropriate (reserve versus active duty) military ID card.	
4	Counsel member concerning transitional health-care benefits – see page 11-21 of this chapter. Ensure transitional health-care benefits are recorded in the DEERS database.	
5	Counsel member concerning civilian reemployment rights – see page 11-20 of this chapter.	
6	Counsel member that, if SGLI and/or Family SGLI coverage were automatically increased to the maximum upon mobilization, and the member does not desire continued maximum coverage after demobilization, the member must submit a new SGLV-8286 / 8286A to elect reduced Member / Spouse SGLI coverage. Forward completed SGLV form(s) to SPO for Direct Access data entry.	
7	Ensure that any medals/awards, competencies and school completions earned by the member are recorded in Direct Access.	
8	If the member's mailing address is changing, update address in DEERS through local DEERS site or by calling the DEERS support office (Phone: 1-800-538-9552 except in CA, HI, and AK; for CA 1-800-334-4162; for HI and AK 1-800-527-5602)	
9	Advise member to update mailing address and direct deposit information in Direct Access if they are changing. If member does not have access to the system, supply address and direct deposit information to SPO for data entry.	
10	Ensure member has instructions for filing final travel claim.	
11	Ensure member does not have pending UCMJ action.	
12	Conduct appropriate security debriefing. (i.e. Vehicle / Access Passes)	
13	Ensure that SPO is notified if member has uncollected CG Mutual Assistance loan(s) that need to be collected from final active duty pay.	
14	Ensure supporting CDA/ESO provide all Reservists being RELAD with copy of CG Education Quick Reference Guide (http://www.uscg.mil/d7/d7dcmc/matrix.htm)	
15	Deliver DD-214 to member.	

Medical Readiness

Introduction

There are two situations that may arise near the conclusion of a member's mobilization status:

1. A member may be physically fit for military duty, but require further medical evaluation or treatment prior to release from active duty.
2. A member may be found not physically qualified for separation or retention and not physically qualified for military duty.

Reference

(a) RPM
(b) ALCOAST 245/03

Post-Deployment Health Assessment

Per reference (b), all reservists called to active duty for 30 days or longer in support of any CG operation will have Post-Deployment Health Assessment (PDHA) accomplished at the time of redeployment/RELAD. Directed requirements contained in the PDHA program include:

A. Completion of the four-page, revised DD form 2796 Post-Deployment Questionnaire.
B. A face-to-face health assessment with a trained health care provider.
C. A blood sample from all redeploying personnel.
D. A quality assurance program to ensure compliance.

Process

A member on active duty orders of 31 days or more who incurs or aggravates an injury, illness or disease in the line of duty shall not be released from active duty without his or her consent. He or she shall be extended on active duty pending resolution of a medical condition or pending completion of the physical evaluation board process.

Members who consent to be retained on active duty shall be continued under their original Title 10 orders. If the member's Title 10 orders are due to expire, the SPO shall extend such orders by adjusting the Reserve Orders, Order End Date in Direct Access.

Members who do <u>not</u> consent to be retained on active duty shall be issued a Notice of Eligibility (NOE) for medical benefits upon release from active duty, and if eligible, shall be entitled to incapacitation pay as outlined in the Reserve Policy Manual.

SPO Demobilization Procedures

Introduction

The below checklist is provides as a job aid to assist the SPO in completing the necessary transactions to release a member from active duty. It should be used along with the Checklist for Separations and the Checklist for RELAD in section 3-B of this manual.

Checklist

Transactions required to release a mobilized member (including a recalled retiree) are listed below.

Note: Only the last transaction (DD-214) is required for a member who was mobilized under 14 U.S.C. 712.

Step	Action/Transaction	Reference
1	Statement of Intent (SOI) transaction shall be submitted in Direct Access 45 days prior to demobilization or member's departure on terminal leave. Use Career Intentions Reason—'SELRES Deactivation' Be sure that the SOI disposes of all leave earned during mobilization and shows any leave being sold. Note: Leave sold by a member that was mobilized under 10 U.S.C.12302 is not subject to the 60 day career maximum. If notification of demobilization is received late, and is within 20 days of the member's release date, <u>in addition to submitting an electronic SOI,</u> an E-Mail SOI will ALSO need to be submitted as prescribed in Exhibit 3-B-1, PPPM. If member's intentions change within 15 days of the sep/DEMOB date notify PSC (SES) via email.	Direct Access Guide, SOI ALPERSRU P/03 and AD/02 ALCOAST 349/04
2	<u>Family Separation Allowance</u> stop transaction. If the reservist is departing on terminal leave in conjunction with RELAD, and the reservist is being paid FSA-T or FSA-S, the FSA entitlement ends on the date the reservist arrives home with his/her family. An FSA stop transaction must be submitted in Direct Access to shut down FSA-T / FSA-S.	PAYMAN, figure 3-22

Continued on next page

SPO Demobilization Procedures, Continued

Step	Action/Transaction	Reference
2	**<u>Direct Access Separation transaction</u>** **<u>Separation tab</u>** be sure the transaction shows: • Separation Program Designator (SPD) = LBK (completion of required active service) • Termination Date = Last day of active duty • Reenlistment Eligibility = RE1 • Reason = 62 (due to fulfillment of active service obligation) **Notes:** The Departure Date is updated when terminal leave dates are entered in the Orders section of the separation transaction. If a reservist is authorized travel time under section 2.K.3 PAYMAN, the travel time needs to be entered as Nonchargeable Absence. <u>Reserve status tab</u> • Employee Classification = Select class member was assigned to before being mobilized. • Reserve Training/Pay Code = Select the code member was assigned to before being mobilized. **Note:** If member will be assigned to the IRR, ISL, or other non-pay status use pay code "H"). • Reserve Classification = Enter the appropriate classification. • TRAY-PAY-CAT Effdt = Enter the day after the termination date. • Classification Effdt= This is the date the member originally entered the Coast guard. Do not modify unless it is blank. <u>Orders link</u> In the itinerary section the Department must reflect the ID of the following: • SELRES – us the department to which the member will be assigned as a drilling member. • RET1 – 003333 with an E-mail to PSC-RAS • RET2 – 003333 and e-mail to PSC-RAS • IRR, ISL – 002817 • Discharge – 003333 • If Travel Time is authorized, it must be listed as "Non-Chargeable Absence – NA" and noted in the comments section. The system will not allow Travel-Time on a RELAD travel order. However, Travel Time is authorized for Reservists who are demobilizing. ***Reminder***: Members with a remaining SELRES drill obligation may not be assigned to the IRR or ISL.	Direct Access On line User Guide and ALPERSRU W/02 PAYMAN, 2.K.3

Continued on next page

SPO Demobilization Procedures, Continued

Step	Action/Transaction	Reference
3	Certification of Release or Discharge From Active Duty (DD Form 214). A DD-214 shall be issued to all members upon completion of a period of mobilization. (However, if a member is being immediately ordered to further active duty upon demobilization, the DD-214 shall not be issued until the end of that additional active duty, i.e., when the member is separated.) Block 18 (Remarks) of the DD Form 214 shall be annotated to include the following information: • That the member was recalled under Title 10 and participated in a contingency operation and the title (s) of operations the member participated in (e.g. "Operation Enduring Freedom") • The member's duty location (s) while on active duty • The dates, if any, of service in a designated imminent danger pay area • All medals/awards received by the member while on active duty • Total cumulative career active duty service for retirement **Note:** If the member has 18 or more years of active duty, contact CGPC (rpm) prior to separating the member.	DD 214 Manual
4	Member Competencies. Input any competencies, awards or school completions earned by the member in Direct Access.	Chapter 4-C PPPM
5	SGLI and Family Member SGLI Elections: The member may wish to decrease or elect no SGLI coverage upon RELAD, ensure new elections are entered in Direct Access.	SGLV Form 8286 and/or 8286A

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Forms and Worksheets

Forms and Worksheets

CG PSC forms are available on the internet at http://www.uscg.mil/hq/psc/forms/.

Other forms referenced in this Manual are available in USCG Electronic Forms on SWSIII or on the Internet at http://www.uscg.mil/ccs/cit/cim/forms1/.

Form Number	Form Name
DD Form 2648	Preseparation Counseling Checklist
DD Form 2494	TRICARE – Active Duty Family Member Dental Plan Election
DD Form 2494-1	Supplemental TRICARE – Active Duty Family Member Dental Plan Election
CG-3453	Request for Reserve Orders
CG-3788A	Enlisted Employee Review Worksheet Non-Rated
CG-3788B	Enlisted Employee Review Worksheet Petty Officer
CG-3788C	Enlisted Employee Review Worksheet Master, Senior, Chief Petty Officer
CG-4251	Military Temporary Duty (TDY) or Civilian Temporary Duty (TD) Travel Orders
CG-5489	Waiver/Remission Application
CG-5489A	PERSRU's Endorsement Waiver/Remission Application
CG-5489B	Financial Statement
CG PSC-1884	Application for Annuity Under the Survivor Benefit Plan, Reserve Component Survivor Benefit Plan, Retired Serviceman's Family Protection Plan and/or Final Retired Pay Due
CG PSC-1900	Retired Pay Projection Request
CG PSC-2000	PCS Departing/Separation Worksheet
CG PSC-2001	Departing TDY or PCS/TEMDUINS to "A" School Worksheet

Continued on Next Page

Forms and Worksheets, Continued

Forms and Worksheets, continued

Form Number	Form Name
CG PSC-2002	CG Direct-Access System Assignment Data Worksheet
CG PSC-2003	PCS (JFTR, Chap5) Entitlements Worksheet
CG PSC-2005	PCS Reporting Worksheet
CG PSC-2010	Advances Worksheet
CG PSC-2015	Pay Delivery Worksheet
CG PSC-2020	Dependency Worksheet
CG PSC-2020A	Support Statement
CG PSC-2020B	Full-Time Student Statement
CG PSC-2020C	Former Spouse Statement
CG PSC-2020D	Designation of Beneficiaries
CG PSC-2025	BAH/Housing Worksheet
CG PSC-2030	Career Development Worksheet
CG PSC-2045	Career Intentions Worksheet
CG PSC-2070	TDY Travel Request Worksheet
CG PSC-2075	Family Subsistence Supplemental Allowance (FSSA) Application
CG PSC-2426	Career Status Bonus (CSB) Election & Instructions
CG PSC-3600	Designation of Beneficiaries for Payment of Unpaid Retired Pay
CG PSC-3799R	Reserve Annual Screening Questionnaire (ASQ)
CG PSC-3867	Claim for Final Retired Pay
CG PSC-5100	Officer Uniform Allowance Claim Worksheet
CG PSC-7210	Designation as Payment Approving Official (PAO)
CG PSC-7221	Retired Allotment Authorization Form
CG PSC-7421	UTS Approving Official (AO) Designation
CG-PSC-7421/2	Direct-Access User Access Authorization/Revocation
CG PSC-11221	Reserve Component Survivor Benefit Plan election Certificate

Standard Abbreviations for Transfer of Personnel

Purpose This is a listing of approved standard abbreviations associated with the transfer of Coast Guard personnel. These abbreviations shall be used to the maximum extent possible when preparing transfer related messages and orders.

ABBREVIATION	MEANING
ACCTDATA	Accounting data
ACDIFOPS	Active duty in a flying status involving operational or training flights.
ACDIFINSOPS	Active duty under instruction in a flying status involving operational or training flights.
ACDU	Active duty.
ACDUINS	Active duty under instruction
ADASGN	For administrative, disciplinary, and accounting purposes
ADASGN REMAINS	While assigned to this duty your reporting unit for administrative, disciplinary, and personnel accounting purposes remains (unit).
ADCON	Advise all concerned.
ADCONSEN	With the advice and consent of the Senate.
ADDELREP	Provided no excess leave involved, authorized ____ days additional delay in reporting to count as leave.
ADDPLA	(And) to such additional places as may be necessary.
ADDU	Additional duty.
ADSTADIS	Advise status and/or disposition
ADTAKE	Advise what action taken.
AEX	Agreement to extend enlistment.
APPN	Appropriation.
ARI	Arithmetic test.
ARREP	Arrival report.
ASAP	As soon as practicable.
ASGN	Assign.
ASGNMT	Assignment
ATTNDIR	Attention directed.
ATTNINV	Attention invited.
AUTH	Authorized or authority.
AUTHAB	Authorized abbreviation.
AUTHPERSMAN	Authorized in accordance with Personnel Manual, Article ___.
AUTHGR	Authority granted.
AUTHPROBOUT	Authorized to proceed on or about (date).

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
AUTHTRAV	Authorized to perform such travel via commercial and/or Government transportation as may be necessary in proper performance of duties. While traveling via Government air outside CONUS, class three priority is certified. Cost of this travel chargeable to (appropriation designated).
AUTHTRAV-NOPENSE	In carrying out these orders, authorized to travel via any means desired with the understanding that there will be no entitlement to additional travel time, mileage or expense in excess of that allowed by the above orders. In case you do not desire to bear this expense, regard this authorization as canceled.
BAGAIR	(Number of pounds indicated) baggage to accompany authorized for air travel outside CONUS.
BI	Background investigation.
BTB	Basic Test Battery.
CADD	Current active duty date.
CARBAGAIR	While traveling via air outside the United States, 66 pounds baggage to accompany authorized, and an additional (number of pounds indicated) baggage is authorized as air cargo for shipment under the same class priority.
CARBASORD	Carry out remainder basic orders.
CIRCUITROUTE	Authorized travel by elected circuitous route with understanding not entitled mileage or expense in excess that allowed by orders, and any additional travel time will count as part of authorized delay. If member does not desire to bear this expense consider the authorization as canceled. Orders to be endorsed by detaching command as to transportation that would have been available at time of detachment to CONUS via shortest usually traveled route.
CLCVN	Class convening
CLER	Clerical aptitude test
CMD	Command.
COG	Convenience of the Government, cognizance.
COI	Course of instruction.
COMLAIRDIR	Where Government aircraft is not available, travel via commercial aircraft is directed.

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
COMLAIRAUTH	Where Government aircraft is not available, travel via commercial aircraft is authorized where necessary to expedite completion of duty.
COMLTRANS-AUTHEXPED	Where Government transportation not available, travel via commercial transportation authorized where necessary to expedite completion of duty.
COMPL	Upon completion thereof
COMPRET	Upon completion return duty station and resume regular duties.
COMPTEMDIRDET	Upon completion temporary duty and when directed detached.
COMPTRADIRDET	Upon completion training and when directed detached.
COMPVANTRADET	Upon completion advanced training detached
CONPRESDU	Continue present duties.
CONTREAT	Continue treatment.
CONUS	Continental United States.
CONVATE	Connection reactivation.
CONVERS	Connection conversion.
COTA	Confirming telephone or message authority of (date indicated).
CX	Canceled.
DDALV	Days en route authorized chargeable as leave.
DEF SEC BRIEF REQ	You are directed to contact your commanding officer for defensive security briefing
DECOM	Upon decommissioning (ship indicated).
DELREP	Provided no excess leave involved authorized to delay (number of days or until date specified) in reporting, to count as leave.
DELREPGRAD	Authorized to delay (number of days or until date specified) in reporting, to count as graduation leave. Total amount of graduation leave shall not exceed 30 days and must be taken within 3 months of date of graduation; otherwise delay counts as advance leave.
DEPN	Dependent(s).
DEPNOTAUTH	Dependents not authorized overseas duty station. For entitlements transportation of dependents and shipment HHG see JFTR, paragraphs U5222-D and U5350-E.
DIFDEN	Duty in a flying status not involving flying.
DIFDENRELAS	Duty in a flying status involving flying as his/her relief.
DIFINSOPS	Duty under instruction in a flying status involving operational or training flights.

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
DIRBY	When directed by the commanding officer (or commander designated). (Date on or about which these orders are effective may be indicated.)
DIRDET	When directed, detached (duty indicated). (Date on or about which these orders are effective may be indicated.)
DIRLAUTH	Direct liaison authorized.
DIRPRO	When directed proceed.
DISESTAB	Upon disestablishment.
DISTREAT	Upon discharge treatment.
DUCON	Duty connection.
DUINS	Duty under instruction.
DURELAS	Duty as his/her relief.
DUSIGN	To duty assigned by.
EAOS	Expiration active obligated service.
EDA	Estimated date of arrival.
EFPROUT	In effecting promotion, procedure outlined in _____ will be followed.
ENL	Enlisted.
ENLORDS	Enlisted orders.
ETO	Enlisted transfer order
FAIRTRANS	(Via) first available air transportation.
FASDU	For assignment to duty.
FATRANS	(Via) first available transportation.
FFA	For further assignment.
FFT	For further transfer.
FURORDMOD	Orders (identified by date or message reference numbers following) further modified.
GCT	General classification test.
GOVAIRAUTHVAIL	Travel via Government aircraft authorized outside CONUS where available. Class ____ priority is certified.
GOVAIRDIRVAIL	Travel via Government aircraft directed outside CONUS where available. Class ____ priority is certified.
GOVCOMLAIRAUTH	Travel via Government and/or commercial aircraft as may be elected by him/her directed where necessary to expedite completion of this duty. Class ____ priority certified for travel via Government aircraft.

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
DIFOPS	Duty in a flying status involving operational or training flights.
DIFOPSDORSE	Detailed to duty in a flying status involving operational or training flights effective such date as endorsed hereon.
DIFOPSREPT	Detailed to duty in a flying status involving operational or training flights effective upon reporting.
DIFPRO	Duty in a flying status involving proficiency flying.
DIFTECH	Duty in a flying status involving operational or training flights as a crewmember.
GOVTRANSDIROUT	Travel via Government transportation directed outside CONUS.
GOVTRANSDIRVAIL	Travel via Government transportation directed outside CONUS where available. Class ____ priority certified for travel via Government aircraft.
GREEMAIN	Orders contingent upon agreement remain on active duty until (date specified). Execution of these orders constitutes your agreement to serve until date indicated. Member notifies issuing authority if he/she does not desire to execute these orders.
HEDALOT	Headquarters allotment.
HELREC	Health record(s).
HELTRA	Helicopter training.
HERDET	Hereby detached (duty indicated).
HHG	Household goods.
HHGLIMIT	Shipment HHG to overseas duty station limited to 2,000 net pounds or 25 percent of weight limitation authorized by the JFTR, Vol. 1, whichever is greater. This limitation does not apply to unaccompanied baggage and professional items.
HOR	Home of record.
HS	High school.
HUMS	Humanitarian reasons.
IAW	In accordance with.
ICW	In connection with.
IMMUN	Obtain appropriate immunization.
IMREP	Immediately report.
INACT	Upon inactivation of (ship or station indicated).

Continued on next page

Standard Abbreviations for Transfer of Personnel,

Continued

ABBREVIATION	MEANING
JFTR	Joint Federal Travel Regulations.
LIMDU	Limited duty.
LOCTRAV/TAXLAUTH	Local travel via streetcar, bus, subway, street railway, train, etc., is authorized. The use of taxicabs at your temporary additional duty station is authorized subject to restrictions outlined in the U.S. Coast Guard Travel Manual, COMDTINST M4600.12 (series).
NAC	National agency check.
NARANO	Name, rate, and social security number
NET	Not earlier than.
NLT	Not later than.
NOCOST	This authorization issued with the understanding that you will not be entitled to reimbursement for expense in connection with these orders. In case you do not desire to bear this expense consider this authorization canceled.
NONEG	Negative replies neither required nor desired.
NOPROCAN	If not already proceeded, orders (identified by date or date-time group which follows) canceled
NORMSHOR	Normal tour of shore duty.
NOTAL	Not to all.
OA	On or about.
OBLISERV	Obligated active service of (number of months indicated) required.
ONBOWCOM	On board that vessel when placed in commission.
ONBOWSERV	On board that vessel when placed in service.
ORDAB	Hold orders in abeyance.
ORDCAN	Orders (identified by date or message reference numbers following) canceled.
ORDMOD	Orders (identified by date or message reference numbers following) modified.
OUTCONUS	Outside continental United States.
PAHEL	Pay record(s) and health record(s).

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
PALCRU	Pay and allowances accrue from.
PANDL	Pay and allowances.
PANDLCHAR	Pay and allowances chargeable (appropriation and identifying numbers designated).
PARA	Paragraph.
PAREC	Pay record(s).
PASEP	Being passed separately.
PCS	Permanent change of station.
PEREF	Personal effects.
PERGRA	Permission granted.
PERNOGRA	Permission not granted.
PHYSEXAM	Physical examination.
PHYSQUAL	Request report physical examination and any physical defects, which disqualify from performing military service of following individual(s) (name, grade, and social security number/designator).
POC	Privately owned conveyance.
POTT	Personnel, orders, transfer, travel.
POV	Privately owned vehicle.
PRIAUTH	Authorized travel via privately owned conveyance with understanding no additional cost to Government involved.
PRO	Proceed.
PROBOUT	Proceed on or about.
PROWDELREP	Proceed without delay (location of ship, commander, or station designated by group(s) immediately following), report duty or purpose indicated.
PROIMREP	Proceed immediately and report.
PROREP	Proceed and report.
PROTIMEREP	Proceed in time report (activity or station designated by group(s) immediately following) (hour and/or date indicated).

Continued on next page

Standard Abbreviations for Transfer of Personnel,

Continued

ABBREVIATION	MEANING
PROVMAIN	Other provisions basic orders remain in effect.
PRODELREP	Proceed without delay and report.
RDLTR	Rapidraft letter.
RELAD	Release(d) from active duty.
RELADTR	Release(d) from active duty for training.
RELBY	When relieved by.
RETAT	It is requested that.
RETULSIGN	Retain on board until ultimate assignment received.
REVAR	Authorized revisit above-mentioned places and vary itinerary as necessary
SECTANSFIND	The Secretary of Transportation has found that this permanent change of station is required by the exigencies of the Service.
SEPCORR	Member/subject matter will be subject of separate correspondence.
SEPROS	Separation processing
SERANDA	Service record(s), health record(s), pay account(s), and personal effects.
SERVHEL	Service record(s) and health record(s).
SERVPA	Service record(s) and pay record(s).
SERVPAHEL	Service record(s), pay record(s), and health record(s).
SERVREC	Service record(s).
SNM	Subject named member.
SUBCONSENT	This assignment to active service subject to consent.
SVCM	Serviceman.
TAD	Temporary additional duty.
TEMAC	Temporary active duty.
TADCON	Temporary additional duty in connection with.
TADINS	Temporary additional duty under instruction.
TEMDIFINSOPS	Temporary duty under instruction in a flying status involving operational or training flights.
TEMDIFOPS	Temporary duty in a flying status involving operation or training flights

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Continued on next page

Standard Abbreviations for Transfer of Personnel,

Continued

ABBREVIATION	MEANING
TEMDU	Temporary duty.
TEMDUCON	Temporary duty in connection with.
TEMDUINS	Temporary duty under instruction.
TEMPLINACT	Temporary duty pending disciplinary action.
TEMSEPRAD	Temporary duty connection separation processing. Upon completion and when directed detached; proceed home for release from active duty accordance instructions.
TEMWAIT	Temporary duty awaiting.
TETO	Training enlisted transfer order.
TPA	Travel via privately owned conveyance authorized.
TRACEN	Coast Guard Training Center.
TRAFOLPERS	Transfer following enlisted personnel
TRAVCHAR	Cost travel chargeable (appropriation or identifying numerals may be added).
TRF	Transfer
TVL	Travel.
TVLMAN	Coast Guard Travel Manual.
ULTSIGN	Ultimate assignment.
UNODIR	Unless otherwise directed.
UNORDCAN	Unexecuted portion of orders (identified by date or message reference numbers following) canceled.
UTNOTREQ	Utilization of Government facilities not required as it is considered such utilization would adversely affect performance of assigned temporary duty.
USCGA	United States Coast Guard Academy.
WHAP	Where/when applicable.
WITHOUTACCTDATA	Issuance this order is without accounting data since it appears order can be executed without cost. If costs or entitlements will accrue member must request and receive written authorization including accounting data from order issuing authority prior execution.

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Overview

Introduction

This enclosure will guide you through the process of completing block 12 of the CG-4251 (TAD Travel Order).

Reference

The following references were used to develop the examples shown in this enclosure. These references set policy for the use of the examples. You will need to refer to these references from time to time.

- Joint Federal Travel Regulations, Vol I
- Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17(series)
- Travel Charge Card Program, COMDTINST 4600.14(series)
- Use of Travelers checks for Travel Advances, COMDTINST 4600.16(series)
- Management and Administration of Aviation Incentive Pays, COMDTINST 7220.39(series)

Note: The presence of example remarks entries does not relieve the order issuing authority or the order preparer of the responsibility of being thoroughly familiar with these references.

In this Enclosure

Description	Page
Purpose and Justification of travel	E-3-1
Mode of Travel	E-3-4
Use of a Privately Owned Conveyance	E-3-6
Example Entries for Mode of Travel	E-3-8
Miscellaneous Entries (advances, flight orders)	E-3-17
Example Entries for Availability/Non-availability of Government Quarters	E-3-18

Purpose and Justification of Travel

Introduction

Every TAD order must describe

- why the travel is being performed and,
- what is to be accomplished during the TAD period.

Describing why the travel is being performed

There are three general WHY descriptions. The descriptions are:

DESCRIPTION	USED TO DESCRIBE
DEPLOYMENT TRAVEL	Temporary duty with forces deployed either on land or aboard ship away from the ship's homeport
TRAINING TRAVEL	Temporary duty in a formal curriculum, whether or not run by the military, to include alcohol/drug rehabilitation
BUSINESS TRAVEL	All other temporary duty travel to include site visits, attendance at information meetings or conferences, delivery of speeches or presentations, special mission travel, emergency leave, medical travel

Describing what is to be accomplished

To describe what is to be accomplished during the TAD period enter a brief statement, explaining what the traveler is expected to do.

Continued on next page

Purpose and Justification of Travel, Continued

Examples

Examples documenting the purpose (WHY) and justification (WHAT) of TAD are shown below.

- "BUSINESS TRAVEL to attend the XYZ Conference",
- "TRAINING TRAVEL to attend YN A School",
- "BUSINESS TRAVEL to conduct sites visits at the (locations named elsewhere on the order/following locations:)"
- "DEPLOYMENT TRAVEL as crew replacement aboard USCGC EVERSAIL".

A more expansive statement of WHY and WHAT might include the accomplishments being directed or specific activities to be conducted/attended.

- "BUSINESS TRAVEL to attend the workshops on harbor navigation at the XYZ Conference, and to acquire not less than three copies of each set of briefing materials if possible."

Mode of Travel

General

The TAD order needs to be as clear as possible as to what the order issuing authority wants the traveler to do (directs). The TAD order needs to be equally clear as to what latitude the traveler has - without the need to seek additional authority from the order issuing command (options or authorization). When there is a mix of travel directions and authorizations, the TAD order needs to be clear as to what applies to what.

Considerations

The description of the Mode of Travel on the TAD order is probably the most complex component.

- It addresses the transportation to be provided to the member to perform the mission directed by the TAD order.
- It is complicated by
  - the number of possible transportation methods (e.g., air, train, bus, ship, privately owned conveyance, taxi, bus, etc.),
  - the number of owners of those transportation methods (e.g., Government, private industry, personally owned),
  - the flexibility desired by the order issuer or needed by the traveler(e.g., directed versus authorized mode of transportation),
  - and the several laws, regulations, contracts, and policy that impact transportation (e.g., Fly America Act, reimbursement limitations, contract city pairs for airline use, Travel Management Center use, etc.).

Two important terms

There are two specific words related to transportation that must be used very carefully. Those words are DIRECT(ED) and AUTHORIZE(D).

Continued on next page

Mode of Travel, Continued

Directed defined

If an order DIRECTS a mode of transportation, the member has no option. That mode has been ORDERED and must be used. There is NO REIMBURSEMENT for an alternative means of transportation unless the appropriate authority - named on the order - endorses the order that the directed mode isn't available.

> **Note**: TAD travelers cannot be directed to travel using their personally owned privately owned conveyances (cars, motorcycles, planes, etc.). TAD travelers cannot be directed to use "special conveyances", a term that includes rental cars. (See JFTR, Appendix A, for definitions of PRIVATELY OWNED CONVEYANCE and SPECIAL CONVEYANCE.

Authorized defined

If an order AUTHORIZES a mode of transportation, the member has some transportation options BUT there is a limitation on the reimbursement (and the potential that leave days will be used to cover travel). The TAD order would need to contain the estimated cost of the (authorized) transportation. If the member chooses to use some other transportation means, the reimbursement would be THE LESSER of whatever the member spent or whatever the authorized mode would have cost.

Use of a Privately Owned Conveyance (POC)

General

Use of a privately owned conveyance (POC) for TAD travel may be permitted either as being:

- Advantageous to the Government, or
- For the convenience of the member.

POC travel on a TAD order CANNOT be directed.

Note: Often it is less expensive to authorize a rental car - always specifying the size - than to authorize POC travel.

Conditions for use of POC as advantageous to the Government

For POC transportation to be determined to be advantageous to the Government the following items must be considered:

- The circumstances of the ordered TAD travel,
- Comparison of the costs of the various transportation alternatives, and
- Other qualitative information.

Costs Comparison

When POC travel is determined to be advantageous to the Government,

- travel days are allowed as for PCS travel and
- per diem expenses are paid for travel days (at the locality rate for the overnight lodging).

POC transportation can be concluded to be advantageous to the Government if the total cost of the transportation (and per diem) for POC transportation (including reimbursement for any travel in and around the TAD location that would be authorized in the order) exceeds the total cost of common carrier transportation (at city-pair fares if available) and appropriate per diem PLUS the cost of a rental car (if one would otherwise be authorized in the order) and gas for the rental car.

Note: The cost of transportation between home and a common carrier terminal and between a common carrier terminal and the TAD location is not specifically considered. Non-inclusion of these costs may affect the quantitative outcome, but the costs often aren't known and can vary widely.

Continued on next page

Use of a Privately Owned Conveyance (POC), Continued

Other considerations

There are times when the quantitative (cost) comparison could lead to a conclusion that POC transportation is NOT advantageous;

HOWEVER, other qualitative (subjective) reasons overcome the cost consideration.

Example: If a member has significant materials to transport, it may be less expensive for the member to use common carrier and ship the materials but far more cumbersome to move them between common carrier terminal and lodging than to simply use a POC in which the materials can be easily transported.

Use of POC for travel in and around the TAD location

If a POC is authorized as advantageous to the Government, there is no guarantee that reimbursement for POC travel in and around the TAD location(s) will be reimbursed unless the order permits the reimbursement.

Decision should be documented

Each decision to permit POC travel as advantageous to the Government should be documented in some manner. This enables after-the-fact questions about the POC travel decision to be factually addressed.

Entitlements when use of POC is authorized for the convenience of the member

If transportation by POC is authorized for the convenience of the member, reimbursement for POC use and per diem while traveling is limited to what the member would have been reimbursed for transportation and per diem had the authorized transportation method been used.

Example Entries for Mode of Travel

Introduction

A number of examples will be provided. One or more of these examples may apply to any given order.

Directing the use of Government transportation

Use this example to direct travel via Government Transportation methods

Note: Government transportation via air (including Air Mobility Command (AMC) procured air seating) is usable for transportation to/from/between locations outside the CONUS. When other forms of Government transportation are available (e.g., car, bus, command aircraft, etc.), Government transportation can be directed in CONUS.

Example: "You are directed to use Government transportation to travel (from (location) to (location)) or (for all transportation). If Government transportation isn't available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other transportation used.

If Government transportation isn't available, you are directed to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). If Government procured transportation isn't available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other transportation used.

If neither Government transportation nor Government procured transportation is available, you are directed to procure common carrier (non contract city-pair) transportation at personal expense directly from a TMC or a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. If neither Government transportation nor Government procured transportation is available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other transportation used."

Continued on next page

Example Entries for Mode of Travel, Continued

Directing the use of Government procured transportation

Use this example to direct travel via Government procured transportation.

- This is the preferred transportation option for TAD travel involving common carrier transportation. Coast Guard policy is that Government procured transportation is arranged through a Travel Management Center and makes extensive use of city-pair contract fares.

Example: "You are directed to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). If Government procured transportation is not available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other forms of transportation used.

If Government procured transportation is not available, you are directed to procure common carrier (non contract city-pair) transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent must not be used, or you will NOT be reimbursed for transportation. If common carrier transportation via (appropriate entry of air, train, etc.) is not available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other forms of transportation used."

Continued on next page

Example Entries for Mode of Travel, Continued

Directing the member to personally procure common carrier transportation

Use this example to direct the member to personally procure common carrier transportation.

- This is not the preferred mode of directed transportation for TAD travel involving common carrier transportation. This DIRECTED transportation method is used when there is no access to a Travel Management Center (TMC).

Note 1: Transportation procured directly by the member from a common carrier typically results in higher cost to the command than does Government procured transportation using a TMC.

Note 2: A travel agent, other than a TMC, CANNOT, by law, be used or reimbursement CANNOT be made for transportation.

Example: "Government procured transportation is not available to you. You are directed to procure common carrier (non-contract city-pair) transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent must not be used, or you will NOT be reimbursed for transportation. If common carrier transportation via (appropriate entry of air, train, etc.) is not available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other forms of transportation used."

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize travel via Government procured transportation

Use the example to authorize the member to travel by Government procured transportation.

- Coast Guard policy is that Government procured transportation is arranged through a Travel Management Center (TMC) and makes extensive use of city-pair contract fares.

Note: A travel agent, other than a TMC, CANNOT, by law, be used or reimbursement CANNOT be made for transportation.

Example: "You are authorized to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). The approximate Government procured transportation cost (excluding per diem) is ($__). If you use an alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of Government procured transportation and applicable per diem. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. If the alternative transportation method results in use of more days than the authorized mode for travel, those days are days of leave."

Authorize the member to personally procure common carrier transportation

Use this example to authorized the member to personally procure common carrier transportation.

- This is not the preferred mode of authorized transportation for TAD travel involving common carrier transportation.
- This authorized transportation method is used when there is no access to a Travel Management Center (TMC).
- Transportation procured directly by the member from a common carrier typically results in higher cost to the command than does Government procured transportation using a TMC.

Note: A travel agent, other than a TMC, CANNOT, by law, be used or reimbursement CANNOT be made for transportation

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize the member to personally procure common carrier transportation (continued)

Example: "Government procured transportation is not available to you. You are authorized to procure common carrier (non-contract city-pair) transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. The approximate common carrier transportation cost (excluding per diem) is ($___). If you use an alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of common carrier transportation at the lowest available commercial fare and applicable per diem. If the alternative transportation method results in use of more days than the authorized mode for travel, those additional days are days of leave."

Maximum transportation flexibility for a member traveling on a Blanket Travel Order

Use this example to provide maximum transportation flexibility to the member due to the nature of the duty being performed (e.g., virtually no-notice transportation requirements to locations remote from the permanent duty station location) and the member's need to make rapid situational decisions as to the appropriate transportation method.

Example: "For the purpose of travel under this order, you are authorized to select the transportation method that, in your judgment, best meets the needs of the travel circumstances at the lowest cost to the Coast Guard. If POC transportation is used, it is advantageous to the Government. You will be reimbursed based on the transportation method you select. If common carrier at personal expense is used, your reimbursement will be based on Government procured transportation NOT being available. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation."

"If available to meet your transportation needs, your first choice for transportation arrangements should always be to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates."

Continued on next page

Example Entries for Mode of Travel, Continued

Limited transportation flexibility for a member traveling on a Blanket Travel Order

Use this example provide limited transportation flexibility to the member due to the nature of the duty being performed (e.g., reasonable lead times for transportation reservations to be made) and the member's lack of need to make rapid situational decisions as to the appropriate transportation method.

Example: "For the purpose of travel under this order, you are authorized to procure common carrier (non contract city-pair) transportation at personal expense. When that is done, Government procured transportation is not available to you. You are authorized to procure common carrier transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation."

"If available to meet your transportation needs, your first choice for transportation arrangements should be to use Government procured transportation. This transportation is best arranged by your Travel Management Center (phone #) making use of contract city-pair rates."

"If you use a transportation method other than personally procured common carrier or Government procured transportation, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of personally procured (non contract city-pair) common carrier transportation at the lowest available commercial fare and applicable per diem. You must document the lowest commercial fare at the time of travel. If the alternative transportation method results in use of additional days for travel, those additional days are days of leave."

"If the circumstances of the specific travel justify the use of an alternate transportation method, forward your travel claim via (order-issuing authority) with an explanation. If the justification is adequate, the transportation method actually used will be approved as being the appropriate method for that specific travel period."

Continued on next page

Example Entries for Mode of Travel, Continued

Normal transportation flexibility for a member traveling on a Blanket Travel Order

Use this example to provide normal transportation flexibility to the member.

Example: "You are authorized to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available. If you use an alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of Government procured transportation and applicable per diem. You must document on your travel voucher the approximate Government procured transportation cost (excluding per diem) for each travel leg made by other than Government procured transportation. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. If the alternative transportation method results in use more days than the authorized mode those days are days of leave."

"If the circumstances of the specific travel justify the use of an alternate transportation method, forward your travel claim via (order-issuing authority) with an explanation. If the justification is adequate, the transportation method actually used will be approved as being the appropriate method for that specific travel period."

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize travel by POC as advantageous to the Government

Travel by POC as advantageous to the Government may be authorized with or without authority for reimbursement for local travel.

Example: "You are authorized to travel by privately owned conveyance (POC) as advantageous to the Government (include one of the following statements):

- You are not authorized reimbursement for any POC travel in and around the TAD location(s)."
- You are authorized reimbursement for POC travel in and around the TAD location(s) while on official business. You must provide an accurate record of the miles driven in and around the TAD location(s) to enable correct reimbursement."

Authorize travel by POC for the convenience of the member

Travel by POC for the convenience of the member may be authorized with or without authority for reimbursement for local travel.

- The authorized transportation method MUST be on the order together with the cost of that method. Inclusion of the cost information enables the after-the-fact comparisons needed for correct reimbursement.

Example 1 (for authorized Government procured transportation): "You are authorized to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). The approximate Government procured transportation cost (excluding per diem) is ($_____).

You are authorized to use POC transportation for your personal convenience. If you use POC transportation or any other alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of Government procured transportation and applicable per diem. A travel agent other than a TMC must not be used, or you will NOT be reimbursed for transportation. If the alternative transportation method results in use of additional days for travel, those additional days are days of leave. (include one of the following statements)...

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize travel by POC for the convenience of the member (continued)

Example 1 (cont'd)

- No reimbursement is authorized for POC travel in and around the TAD location(s) (or)
- You are authorized reimbursement for any POC travel in and around the TAD location(s). You must provide an accurate record of the miles driven in and around the TAD location(s) to enable correct reimbursement."

Example 2 (For authorized personally procured common carrier transportation): "Government procured transportation is not available to you. You are authorized to procure common carrier transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. The approximate common carrier transportation cost (excluding per diem) is ($____).

You are authorized to use POC transportation for your personal convenience. If you use POC transportation or any other alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of common carrier transportation at the lowest available commercial fare and applicable per diem. If the alternative transportation method results in use of additional days for travel, those additional days are days of leave." (include one of the following statements)...

- No reimbursement is authorized for POC travel in and around the TAD location(s) (or)
- You are authorized reimbursement for any POC travel in and around the TAD location(s). You must provide an accurate record of the miles driven in and around the TAD location(s) to enable correct reimbursement."

Miscellaneous Entries

Travel Advances

Select and enter one of the following remarks if appropriate.

- "Travel charge card holder, member authorized (amount) in travelers checks charged against travel charge card."
- "No travel charge card, member authorized (amount) in travelers checks charged against Coast Guard."
- "Travel charge card not required, member authorized (amount) in travelers checks charged against the Coast Guard."

Issuing and terminating flight orders

Select and enter one of the following remarks if appropriate.

- "These orders constitute duty involving operational flying (DIFOPS) from (date) through (date)" [and, if the aviator is entitled to monthly ACIP], "All flight time accrued under these flight orders must be certified by the appropriate unit official as and endorsement on these orders".
- "These orders constitute periodic (noncrew member/crew member/flight surgeon) flight orders from (date) through (date). You are placed in a monthly aviation incentive pay (MAIP) status from (date) through (date) [does not apply to flight surgeons]. All flight time accrued under these flight orders must be certified by the appropriate unit official as an endorsement on these orders".

Special Provisions/ Remarks

If applicable enter:

- Justification of non-contract carrier use.
- Authorization for Actual Expense Allowance (cite and attach a copy of the AEA authorization provided by the Commanding Officer.
- Enter any data or information required in other blocks of the travel order when the space provided in the blocks is inadequate.

Example Entries for Availability/Nonavailability of Government Quarters

Background

Commands must ensure that available adequate government quarters and government mess are used by military members on TDY/TAD to the maximum extent practical (when their use would not adversely affect the performance of the assigned mission).

When the use of Government Quarters/Mess must be directed

The use of adequate government quarters and government mess must be directed in travel orders when:

- The order-issuing authority requires that adequate government quarters be used.
- Personnel are ordered TDY/TAD to ships or other deployed units.
- Personnel are ordered TDY/TAD to formal courses of instruction at schools (including PCS/TEMDU) held at military installations of any service.

Requirements when TDY/TAD is at a military installation

If the member is traveling to a military installation the order-issuing authority must enter a statement on the member's TDY/TAD order regarding the availability of government quarters and government mess at the TDY/TAD site.

The statement must also indicate whether or not the member is directed to use the government quarters and mess at the TDY/TAD site or if a determination has been made that their use would adversely affect the performance of the assigned mission.

Example entries for use when government quarters/mess are available

Use this example to direct the use of available adequate government quarters and mess.

Example: "You are directed to utilize government quarters and mess, the availability of which has been confirmed by [enter the name and phone number of the point of contact for the command controlling the adequate government quarters/government mess at the TDY/TAD site, provide any confirmation numbers or other references as appropriate]. Reimbursement for commercial lodging expenses will not be authorized without verifiable certification of nonavailability on your travel claim."

Continued on next page

Example Entries for Availability/Nonavailability of Government Quarters, Continued

Example entries for use when government quarters/mess are available (continued)

Use this example when the order-issuing authority determines that the use of government quarters/mess would adversely affect the performance of the assigned mission.

Example: "A determination has been made by [enter the title of the official authorized to make such determinations] that the use of available government quarters and mess would adversely affect the performance of the assigned mission. Reimbursement for commercial lodging expenses is authorized."

Example entry for use when government quarters/mess are not available

Use this example when it has been determined that adequate government quarters/mess are not available.

Example: "Per [enter the name and phone number of the point of contact for the command controlling the adequate government quarters/government mess at the TDY/TAD site, provide any confirmation numbers or other references as appropriate], adequate government quarters and mess are not available. Reimbursement for commercial lodging expenses is authorized."

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Nondisability Retirements

1900
15 May 2004

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: SEPARATION PAYMENT UPON RETIREMENT FROM ACTIVE DUTY

1. The separation payment provided to you upon your retirement from active duty represents 100 percent of your final pay as calculated by JUMPS. Please be advised that this payment may be over or under the final pay due you as a result of clerical or administrative errors or delays in processing pay transactions, or changes in the planned disposition of your leave.

2. Any additional payment to you will be paid by the Coast Guard COAST GUARD PERSONNEL SUPPORT CENTER (PSC) after your separation transactions have processed in JUMPS and a final review of your pay account is made. This will normally be within 45 days after your date of retirement. You will also be sent a final Leave and Earnings Statement (LES) within 45 days after retirement.

3. If an overpayment is discovered upon final review of your active duty pay account, PSC will initiate action to collect the overpayment from your retired pay.

4. Your final LES and any additional payment will be mailed to the address provided on the Tax Information Form (CG-5225) prepared by your Personnel Reporting Unit at the time of separation processing. If you wish to receive your final LES and any additional payment at a different address, you must notify PSC (SES) in writing within 20 days. Your letter must include your name, Employee Identification number (EMPLID) and the address you want the payment sent to. Please address your correspondence to:

COMMANDING OFFICER (SES)
COAST GUARD PERSONNEL SUPPORT CENTER
444 SE QUINCY STREET
TOPEKA KS 66683-3591

5. Your IRS form W-2 for calendar year 19 - will be mailed by PSC to the address indicated on the Tax Information Form CG-5225 unless PSC (SES) is notified otherwise in writing. Your IRS form W-2 will be mailed by 31 January next year.

6. Any questions concerning retirement travel entitlements or settlement of travel claims should be coordinated with PSC (TVL) at 1-888-USCGTVL. For questions concerning the final LES, additional payment, or the IRS form W-2 call PSC (SES) at (785)-357-3550.

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Survivor Benefit Plan Election Requirements

1900
15 May 2004

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones, GMC

Subj: SURVIVOR BENEFIT PLAN

Ref: (a) Your Guide To Retirement, PSCINST M1800.5 (series)

1. As a concerned commanding officer, I am writing this letter to ensure that you are fully aware of the Survivor Benefit Plan (SBP).

2. As you near retirement, it is important that you fully understand SBP.
If you do not make an election, you will be automatically enrolled at maximum level.
You may elect coverage at less than maximum or not to participate at all.
You will have a one-year period, beginning two years after the commencement of retired pay, to voluntarily terminate SBP coverage. You will be notified when you reach your second anniversary of retired pay, and if you wish to terminate SBP you should contact PSC (RAS) for the disenrollment form. Once participation is discontinued under these provisions, no benefits may be paid in conjunction with your previous participation. No refund of any premiums properly collected shall be made and you may not resume participation in SBP for any category or beneficiary.
The decision not to participate at retirement in SBP is irrevocable.
You and your spouse should review Chapter 3 of reference (a) prior to making an election.

3. If you do not elect coverage at the maximum level, your spouse must concur with your election.
You are required to advise your spouse of your election.
Your spouse may indicate concurrence with your SBP election by signing part VII of the Retired Pay Account Worksheet and Survivor benefit Election (CG PSC-4700).
If your spouse does not concur with your decision or is not available for signature, I am required by Public Law 99-145 to advise your spouse of their options.
Your spouse can concur with your election of less than maximum. However, if your spouse does not concur or should not respond to my letter prior to your retirement, you will be enrolled at the maximum level of participation.

4. Your election is to be made on CG PSC-4700 and should be completed approximately 60 days prior to your retirement or date of departure on terminal leave. Failure to return a completed election will result in you being enrolled in the SBP at maximum level of participation, regardless of your wishes.

5. If you have any questions concerning the Survivor Benefit Plan, (enter name of local work-life Career Information Specialist or unit contact and phone number), or the staff at Coast Guard PERSONNEL SUPPORT CENTER, Retiree and Annuitant Services (RAS) (785-357-3415) are available to assist you and your spouse.

M. R. ROBERTS
CG GP Somewhere

Spousal Notification/Concurrence Letter

CERTIFIED MAIL - RETURN RECEIPT REQUESTED

(Mr./Mrs.) Date:

Dear (Mr./Mrs.) _____:

I am writing to tell you about the Survivor Benefit Plan (SBP) and a decision your spouse has made about participation in the SBP. It is important that you understand this, so please read it carefully.

In the event of your spouse's death, their Coast Guard retired pay automatically stops. Under SBP, your spouse can provide an annuity of up to 55 percent of their retired pay to you and /or your children. In order for you to receive the SBP annuity, your spouse must designate a "base amount" of $300.00 up to the full amount of their monthly- retired pay. Your annuity would be 55 percent of the chosen base amount until you reach age 62. From age 62 on, it will be reduced (due to entitlement to social security benefits) to no less than 35 percent of the chosen base amount. The premium costs to participate in SBP are a small percentage of the designated base amount, and would be deducted from your spouse's monthly-retired pay.

Under this plan, your spouse must choose one of the following options before retirement:

a. To cover both you and your children at the maximum level possible (full retired pay). This means you (or your children) would receive 55/35 percent of your spouse's retired pay after their death.

b. To cover only you, or only your children, at the maximum level possible.

c. To cover you or your children or both, at less than the maximum level. This means you (or your children) would only receive an annuity of 55/35 percent of this reduced "base amount."

d. Not to participate in SBP at all, which means you (and your children) would receive no annuity in the event of your spouse's death.

Your spouse has elected option (b, c, or d). They have elected to choose the appropriate option below that corresponds to the member's election in blocks 8 and 9 of CG PSC 4700.

(cover only your children at the maximum base amount and not cover you).

or (cover you and your children but only at a reduced base amount of $XXX.XX).

or (cover only you at a reduced base amount of $XXX.XX).

or (cover only your children at a reduced base amount of $XXX.XX).

or (not participate in SBP at all).

Continued on next page

Under Public Law 99-145, your written consent is required before the above election made by your spouse can be effective. It is important that you understand the decision not to participate in SPB at retirement is irrevocable, meaning it cannot be changed. The only exception to this may occur if there is an open season for election into the SBP.

After election into the Plan at any level, there is one opportunity to disenroll. This occurs two years after the commencement of retired pay, when your spouse will have a one year opportunity to voluntarily terminate SBP coverage. As His/Her spouse, you must also concur with that election if made. The decision to terminate SBP coverage during this one-year period is also irrevocable, and once participation is discontinued, no benefits may be paid in conjunction with previous participation, no refunds of any premiums properly collected shall be made and (he/she) may not resume participation in SBP for any category of beneficiary. Your choices at this time are as follows:

a. Concur with your spouse's election; or

b. Not concur with your spouse's election, in which case your spouse will be enrolled in SBP at the maximum level (based on full retired pay); or

c. Not respond to this letter, in which case, your spouse will be enrolled in the SBP at the maximum level (based on full retired pay).

Your signature and that of at least one witness is required on the endorsement below. Return this letter and your endorsement to this Command. If your response to this letter is not received by (30 days prior to date of member's retirement), we will assume that you have chosen not to respond to this letter.

If you or your spouse have any questions about SBP, please write or call me at _____. I will be pleased to discuss this issue with you further and help you arrange the SBP coverage you both desire.

Sincerely,

Commanding Officer's Signature

RETURN ENDORSEMENT

I,_____(spouse's name)_____, (wife/husband) of Retiree's Name, rank/rate and SSN have been advised that my (husband/wife) has made the following election under the Survivor Benefit Plan: (enter retiree's election--should be identical to the fourth paragraph of the above letter).

(Check only on block below:)

_____ I consent to my spouse's election.

_____ I do not consent to my spouse's election.

Signature

Witness: (over 18 and not a family member):

Signature _____ Address _____

Separation Pay (member due money)

1900
15 May 2004

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: SEPARATION PAY AND RELATED DOCUMENTS

1. The separation payment provided to you upon your separation from active duty represents a substantial portion of your final pay and includes payment for any unused leave due you through your date of separation from the Coast Guard. Please be advised that this payment may be over or under the final pay due you as a result of clerical or administrative errors or delays in processing pay transactions, or changes in the planned disposition of your leave.

2. Any additional payment due you will be paid by the Coast Guard Personnel Support Center (PSC) after your separation transactions have processed in Direct Access and a final review of your pay account is made. This will normally be within 90 days after your date of separation. You will also be sent a final Leave and Earnings Statement (LES) within 90 days after separation.

3. The final LES and final separation payment will be mailed to your home address as listed in Direct Access.

4. Your IRS Form W-2 for this year will be mailed by PSC to the address indicated on the Tax Information Form (CG-5225) unless PSC (SES) is notified otherwise in writing. Your IRS Form W-2 will be mailed by 31 January next year.

5. Any questions concerning separation travel entitlements or settlement of travel claims after separation can be answered by the Travel Claim Assistance Team at (785) 339-2258. Claims for reimbursement of Do it Yourself (DITY) Moves can be answered by Coast Guard Finance Center at 1-800-564-5504. For questions concerning the final LES, additional payment, or the IRS form W-2 call PSC (SES) at (785) 357-3550.

#

Separation Pay (member owes money)

1900
xx xxx 20xx

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: SEPARATION PAY AND RELATED DOCUMENTS

1. The COAST GUARD PERSONNEL SUPPORT CENTER (PSC) has determined that you are not entitled to any final payment upon your separation from the Coast Guard

2. A final review of your pay account will be made by PSC (SES) after your separation transactions have been processed in Direct Access. If this review indicates that you have been overpaid, you will be notified in writing of the nature and amount of any indebtedness. If the review indicates that you are entitled to additional moneys, a special check payment will be sent to you by PSC (SES). The payment should be mailed to you within 90 days after your date of separation. You will also be sent a final Leave and Earnings Statement (LES) within 90 days after separation.

3. The final LES and final separation payment (or notification of overpayment letter, if indebted) will be mailed to your home address as listed in Direct Access.

4. Your IRS Form W-2 for this calendar year will be mailed by PSC to the address indicated on the Tax Information Form (CG-5225) unless PSC (SES) is notified otherwise in writing. Your IRS Form W-2 will be mailed by 31 January next year.

5. Any questions concerning separation travel entitlements or settlement of travel claims after separation can be answered by the Travel Claim Assistance Team at (785) 339-2258. Claims for reimbursement of Do it Yourself (DITY) Moves can be answered by Coast Guard Finance Center at 1-800-564-5504. For questions concerning the final LES, additional payment, or the IRS form W-2 call PSC (SES) at (785) 339-3550.

#

Information Regarding Active Duty Separation Status

1900
xx xxx 20xx

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: INFORMATION REGARDING ACTIVE DUTY SEPARATION STATUS

1. You have been given DD Form 214, Certificate of Release or Discharge from Active duty. We recommend that you store it in a safe place, as you will undoubtedly have need for it at some future date. The purpose of the DD Form 214 is to provide separated personnel with a concise record of data pertaining to active service within the Armed Forces for the purpose of obtaining civilian employment commensurate with service qualifications and experience. The DD Form 214 is also necessary for obtaining such benefits as may accrue under various federal and state legislatures as the result of active service in the Armed Forces. In the event the original of the DD Form 214 contains an erroneous entry, you may obtain a correction by addressing a request to Commander (adm-3) Coast Guard Personnel Command, 2100 2nd Street SW, Washington, DC. 20593-0001. If your DD Form 214 is lost, or you require a copy of your medical records, you may obtain a copy of them at the above address within the first six months of your separation. Once you have been separated for more than six months, you may obtain a copy of your DD Form 214 by addressing a request to National Personnel Record Center, Military Records, 9700 Page Blvd, St. Louis, MO 63132-5100. The Department of Veterans Affairs will maintain your medical record, and you may obtain a copy by writing to the VA Records Management Center, PO Box 5020, St Louis, MO 63115. Any such request as noted above must include your full name, rank, social security number, date of separation, and reason for request.

2. Upon separation from the U.S. Coast Guard, all persons are required to surrender all identification cards that may be in their possession., including your Armed forces Identification and Privilege Cards for yourself and all dependents.

3. The “Ex-servicemen’s Unemployment Compensation Act of 1958” (Public Law 85-848) authorized unemployment insurance protection of ex-servicemen of all ranks who began their active service in the Armed Forces after 31 January 1955. The Department of labor has prepared an informative pamphlet concerning the provisions of the Act. The pamphlet is available through normal source of supply.

4. Enclosed are travel vouchers for you and dependents (if applicable). Failure to submit these claims will result in you not receiving the per diem portion of your travel entitlements. When submitting these claims you are required to submit the original or copy of the original DD Form 214. You are required to complete the travel claims and submit them in the self-addressed envelope to: Commanding Officer (TVL), COAST GUARD PERSONNEL SUPPORT CENTER, 444 SE Quincy Street, Topeka, KS 66683-3591.

5. If you have Servicemember’s Group Life Insurance (SGLI) in force, you may convert to Veteran’s Group Life Insurance (VGLI) for a 5-year period commencing with the post-service SGLI coverage, which is the 121st day after separation. Applications, payments and inquires concerning SGLI and VGLI should be sent to: Office of Servicemember’s Group Life Insurance, 212 Washington Street, Newark, NJ 07102. Any Veterans Administration Office can supply information and forms.

Continued on the next page.

Subj: INFORMATION REGARDING ACTIVE DUTY SEPARATION STATUS 1900
xx xxx 20xx

6. If you have contributed to the Thrift Savings Plan (TSP) during your career, you need to make a withdrawal option once you separate from the Coast Guard. You will need to complete Form TSP-U-70, Withdrawal Request, to specify the TSP withdrawal option you want. Mail the form to the TSP Service Office on the form. After your separation, the National Finance Center will be your primary contact for information about your account and withdrawal procedures.

#

Encl: (1) Travel Vouchers

RELAD

1900
xx xxx 20xx

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: TERMINATION OF ACTIVE DUTY IN THE REGULAR COAST GUARD AND TRANSFER TO THE COAST GUARD RESERVE

Ref: (a) 10 USC 651

1. Effective (**insert date of separation**) your active duty in the regular Coast Guard is hereby terminated by reason of expiration of enlistment. You are hereby immediately transferred to the Coast Guard Reserve and concurrently released to inactive duty. You will be required to serve in the Coast Guard Reserve until (**insert expected loss date**), unless sooner discharged by competent authority.

2. During the period of your obligated service in the Coast Guard Reserve you shall be subject to such additional training as may now or hereafter be prescribed by law for such Reserve. Failure to fulfill all or any part of your service obligation may result in trial by appropriate authorities of the United States for violation of reference (a).

3. You have stated that your mailing address is: **(insert correct final address)**

4. Subsequent to this date, your new unit will be (**insert new unit address and phone number**). This command will advise you fully as to your obligations and other matters connected with your service in the Coast Guard Reserve. You will keep this command informed of any change of address. You must promptly reply to all official communications. Any information you desire regarding your reserve obligation or status should be requested from your Commanding Officer or your unit administration office.

#

Copy: **(provide copy to ISC (fot) responsible for geographic area which member will reside after separation)**

Reserve Thank You Letter

Civilian Employer
Attn:
1234 Anywhere St
Elsewhere, KS 66601-0001
Dear Sir or Madam:

I am writing this letter to thank Civilian Employer for its past support of John Smith's participation as a valued member of U. S. Coast Guard Unit. It is only with positive support from our reserve members' family and employers that the United States military services are able to protect the national interests of our country.

At this time I need to advise you that – due to recent events – John Smith has been involuntarily called to active duty with Unit under Title 10 of the United States Code. As a Yeoman Second Class (YN2) at Unit, he will be deployed either within the United States or overseas as directed by proper authority. These orders are for a period of 1 Year, but it is impossible to tell at this time if they might be shortened or lengthened.

I am enclosing some information from the Employer Support of the Guard and Reserve (ESGR) that might answer questions that you have concerning your rights and the employee's rights under the law, and provide some resources to answer others. I'd also like you to feel comfortable in contacting me personally, at (785) 339-3940, should you still have questions or concerns.

Once again, my personal thanks for the part your organization is playing in helping to keep America strong.

Sincerely,

RICHARD H. SMITH
Captain
U. S. Coast Guard

Administrative Remarks

Introduction

This enclosure will guide you through the process of drafting Administrative Remarks (CG-3307).

Reference

Pg-7 Instruction establishes policy and standards for preparation and submission of Administrative Remarks (CG-3307) entries and applies to all personnel involved in this process.

In this Enclosure

Description	Page
Distribution of Administrative Remarks (CG-3307)	E-6-2
General Instructions for Use and Preparation of CG-3307's	E-6-3
Accession	E-6-4
Assignment and Transfer	E-6-9
Advancement and Reduction	E-6-14
Performance and Discipline	E-6-18
Separation	E-6-34
Selective Reenlistment Bonus (SRB)	E-6-44
Selective Reserve (SELRES) Enlisted Bonus Programs	E-6-46

Distribution of Administrative Remarks (CG-3307)

Procedure

The CG-3307 must be prepared in original and one copy as follows:

1. The original is filed in the SPO PDR, and the copy is mailed to Commander (CGPC-adm-3) for electronic imaging into the Headquarters PDR.
2. There are two exceptions to the distribution of CG-3307's:
    a. For evaluations not completed in Direct Access - An additional copy of the CG-3307 to document counseling related to enlisted evaluations must be placed inside the original Enlisted Performance Evaluation Form (CG-3788 (series)) and forwarded to HRSIC (ADV).

    b. Original CG-3307's remaining at time of separation/reenlistment must be attached to either the original Discharge and Reenlistment Contract or DD-214 as directed in PDR Manual.

General Instructions for Use and Preparation of CG-3307's

1. Administrative Remark entries are broken down into the following “types”:
   a. Accession (ACC-#)
   b. Assignment and Transfer (A&T-#)
   c. Advancement and Reduction (A&R-#)
   d. Performance and Discipline (P&D-#)

   Note: Includes indebtedness, non-support of dependents, general (positive/negative), evaluations, good conduct eligibility, and weight

   e. Separation (SEP-#)
   f. Selective Reenlistment Bonus (SRB-#)
   g. Selective Reserve (SELRES) Enlisted Bonus Programs (BON-#)

2. Each of the sample entries consists of the following information:
   a. Entry type and number
   b. The reference providing the requirement to complete the CG-3307 entry.
   c. The responsible level for completing the entry, i.e., SPO or Unit.
   d. The entry itself. The entry should be modified to fit the circumstances as necessary.
   e. When and where applicable, a member’s acknowledge entry

   Note: It has been determined that items a. thru c. are valuable for tracking authorized entries and therefore MUST be included as part of the Administrative Remark entry when actually preparing a CG-3307.

3. If a unit other than the member’s current permanent duty station is preparing the CG-3307 entry, that unit name MUST appear beneath the typed signature block, e.g.:

A.B. SEA, CAPT. USCG
Commanding Officer
USCGC JARVIS (WHEC 725)

CG-3307's for Accession

Entry Type: Accession (ACC-2)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): Honorably discharged from the USCGR Delayed Enlistment Program (DEP) for the Convenience of the Government to enlist in the regular coast Guard on _____ having served in the DEP since _____. Time serve in the DEP is creditable toward completion of the 8-year military obligation, but IS NOT creditable for purposes of longevity or pay and allowances.

J.P. JONES

Entry Type: Accession (ACC-3)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I have been advised that the illegal use or possession of drugs constitute a serious breach of discipline that will not be tolerated in the Coast Guard.

Also, illegal drug use or possession is counter to team spirit and mission performance and jeopardizes safety. I understand that I am not to use, possess or distribute illegal drugs, drug paraphernalia or hemp oil products.

I also understand on reporting to recruit training, I will be tested by urinalysis for the presence of illegal drugs. If my urine test detects the presence of illegal drugs, I may be subject to discharge and receive a general discharge. I hereby affirm that I am drug-free and ready for recruit training.

J. P. JONES

Entry Type: Accession (ACC-4)
Reference: Recruiting Manual, COMDTINST M1100.2 (series) Responsible Level: Recruiter
Entry:
(DATE): I am aware that upon arrival at the recruit training center, I will receive a complete and thorough pretraining physical examination, including a dental examination, which I must pass to be permitted to enter recruit training.

J. P. JONES

Continued on Next Page

CG-3307's for Accession, Continued

Entry Type: Accession (ACC-5)
Reference: Recruiting Manual, COMDTINST M1100.2 (series) Responsible Level: Recruiter
Entry:
(DATE): I do not possess a social security card, although I have applied for issuance/replacement of one on form SS-5. I have been advised by the Social Security Administration that the number being issued to me is _____-____-_____ I authorize the Coast Guard to cite my social security card for number identification purposes prior to forwarding it to me.

J. P. JONES

Entry Type: Accession (ACC-6)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I certify that I am a resident alien and my number is:

_____

J. P. JONES

Entry Type: Accession (ACC-7)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I understand that, until I become a United States citizen, I WILL NOT be eligible for reenlistment or to enter the following ratings: AMT, AST, AVT, ET, FT, IT, GM, MST, PA, QM, RD, TC, TT, or YN. Nor will I be eligible to attend Officer Candidate School or be appointed as a Chief Warrant Officer (CWO).

J. P. JONES

Continued on Next Page

CG-3307's for Accession, Continued

Entry Type: Accession (ACC-8)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I have been advised that my medical examination revealed that I do not have normal color vision. I understand that, if I am enlisted in the Coast Guard, I will not be permitted to enter the ratings of AMT, AST, AVT, BM, EM, ET, FT, GM, HS, IV, PA, PS, QM, RD, or TT during the period of this or subsequent enlistments. I am also aware that if I enter the MST rating, I will not be eligible for appointment to CWO (BOSN). Furthermore, I have been advised that my defective color vision disqualifies me from applying for Officer Candidate School or the Coast Guard Academy.

J. P. JONES

Entry Type: Accession (ACC-9)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I am aware I am eligible to reenlist with a ____ designator; however, I intend to pursue a career as an _____ and desire to reenlist as an E-3 without a designator.

J. P. JONES

Entry Type: Accession (ACC-10)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I have been advised, per Article 5-C-33, Personnel Manual, COMDTINST M1000.6 (SERIES), that I may be eligible for advancement to pay grade E-4, in my formerly held rating, without having to attend class "A" school or compete in the servicewide exam, if I am found eligible in all respects and I am recommended for advancement. I must serve a minimum of 6 months on my present enlistment, and either hold a designator or have been rated at the time of my last separation from active duty. My commanding officer's recommendation must be submitted within 5 years of my latest separation from active duty. If I am ineligible or not recommended for advancement under this program, I understand I must compete for advancement to pay grade E-4.

J. P. JONES

Continued on Next Page

CG-3307's for Accession, Continued

Entry Type: Accession (Reserve) (ACC-11)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I hereby certify that all information on my enlistment documents is current and accurate. I have not had any involvement with the police or had any changes in dependency unless noted on those documents. I understand withholding information is punishable under the Uniform Code of Military Justice (UCMJ) and may result in less than honorable discharge for fraudulent enlistment.

J. P. JONES

Entry Type: Accession (Reserve) (ACC-12)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I am over the age of 40 and understand that I will not be able to complete 20 satisfactory years of federal service by the age of 60, and that I cannot earn Reserve Retirement under 49 C.F.R. 1.45(a)(1).

J. P. JONES

Entry Type: Accession (Reserve) (ACC-13)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE):I have been advised that all members enlisting in the Coast Guard Reserve must take a difficult swimming test at recruit training (RP & RK), Reserve Officer Candidate Indoctrination (ROCI), and Reserve Enlisted Basic Indoctrination (REBI). I understand that I cannot graduate from recruit training, ROCI, or REBI unless I have passed this swimming test.

J. P. JONES

Continued on Next Page

CG-3307's for Accession, Continued

Entry Type: Accession (Reserve) (ACC-14)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): (for all reserve applicants except RP & RK): I understand that inability to satisfy the swimming requirement detailed in Military Requirements (MRN) l.L.201 of the Enlisted Qualifications Manual, COMDTINST M1414.8 (series), will adversely affect my career. I have been advised that the possible effects include: prohibition from advancement, reenlistment, or an afloat duty assignment; or involuntary transfer to the IRR, or discharge.

J. P. JONES

Entry Type: Accession (Reserve) (ACC-15)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I hereby acknowledge and agree that I have the duty to establish and maintain an account with a financial institution for the direct deposit of my Coast Guard net pay and allowances. I understand that I am required to execute the appropriate forms at my first assigned drilling unit to ensure that my Coast Guard net pay and allowances are deposited directly into this account. I understand that I may freely choose to change financial institutions to satisfy this requirement. I understand that I will continue to have the duty to maintain such an account for the direct deposit of my Coast Guard net pay and allowances as long as I remain a member of the selected reserve unless I receive a specific exemption from this requirement from the Coast Guard. I understand that failure to establish and maintain such an account in the absence of a specific exemption may subject me to administrative and/or disciplinary action under the Uniform Code of Military Justice (UCMJ).

Signature of Recruiter | Signature of Applicant

Entry Type: Accession (ACC-16)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I understand I am accepted for enlistment with spouse and _____ dependents as spouse is an active duty Coast Guard member in the grade of _____. Every attempt will be made for collocation with my spouse, but such collocation is not guaranteed.

Enlistee's Signature

CG-3307's for Assignment and Transfer

Entry Type: Assignment and Transfer (A&T-1)
Reference: Section 4-A, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): I have been counseled on the requirement of Article 4-A-12, Personnel Manual, COMDTINST M1000.6 (SERIES) regarding my availability for unrestricted worldwide assignment. I further certify that the situation, which occasioned my original request, in my letter 1326, dated (date), has been completely alleviated and I am now available for unrestricted worldwide assignment.

J. P. JONES

Entry Type: Assignment and Transfer (A&T-2)
Reference: Section 4-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Received orders for Humanitarian assignment (HUMS) under the provisions of Article 4-B-11, Personnel Manual, COMDTINST M1000.6 (SERIES). Instructions concerning nonentitlement to expenses incurred in the execution of these orders have been explained to me this date. In view of a permissive travel authorization for HUMS to a new permanent duty station being issued, I understand that under no circumstances will I be reenlisted or extended without Commandant approval. I must present clear documentation that my hardship situation is completely resolved, and that I am available for unrestricted reassignment in accordance with service needs, for Commandant approval to be granted.

J. P. JONES

Entry Type: Assignment and Transfer (A&T-3)
Reference: Section 4-C, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Found to be unsuitable as (enter assigned special duty) due to (state reasons and specifics) per Article 4-C-13, Personnel Manual, COMDTINST M1000.6 (SERIES). Commander (MPC-EPM) notified this date and reassignment requested.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I have been counseled and understand the reason(s) for the above action.

J. P. JONES

Continued on Next Page

CG-3307's for Assignment and Transfer, Continued

Entry Type: Assignment and Transfer (A&T-4)
Reference: Section 4-C, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): I have read and understand Article 4-C-31, Personnel Manual, COMDTINST M1000.6 (SERIES), relating to suitability of members to serve on icebreaker duty. Neither I nor my dependents possess any physical or mental abnormalities, except as indicated, which might result in a determination that I be disqualified for such duty: (state disqualification or indicate “none to my knowledge"). I consider myself fully qualified for icebreaker duty.

J. P. JONES

(DATE): Compliance with the provisions of Article 4-C-31, Personnel Manual, COMDTINST M1000.6 (SERIES), is certified. John Paul Jones is considered to be suitable in all respects for icebreaker duty.

A. B. LIST, CWO4, USCG
Personnel Officer

Entry Type: Assignment and Transfer (A&T-5)
Reference: Section 4-E, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): I understand that neither my spouse nor I will be considered for reassignment under the provisions of Article 4-A-11, Personnel Manual, COMDTINST M1000.6 (SERIES), until eligible for normal rotation.

JOHN PAUL JONES

Continued on Next Page

CG-3307's for Assignment and Transfer, Continued

Entry Type: Assignment and Transfer (A&T-6)
Reference: Section 4-E, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
OVERSEAS SCREENING

(DATE): I, _____, am aware that failure to divulge disqualifying information, or amplifying information (medical, dental, psychological, physical, or educational problem(s)) pertaining to the questions on the checklist for overseas screening, may ultimately result in disciplinary action punishable under the UCMJ.

_____
member (signature) DATE member (name, rank/rate)

_____
spouse (signature) DATE

On the basis of all available information, I endorse/I do not endorse (circle one) the member's orders to the overseas assignment. (A copy of the completed checklist will be forwarded to the receiving command.)

CO/OIC (signature) DATE CO/OIC (name, rank)

Entry Type: Assignment and Transfer (A&T-9)
Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry
(DATE): I hereby request assignment to a non-rescue swimmer tour of duty as the needs of the service allow. I understand that two consecutive non-rescue swimmer tours of duty or an extension of a non-rescue swimmer tour are prohibited. If I decide not to return as an operational rescue swimmer, I must have over 18 years of active service and apply for retirement; obtain a change in rating; or request voluntary discharge. I also understand I will not be eligible for rescue swimmer Special Duty Assignment Pay during this non-rescue swimmer assignment.

J. P. JONES

(DATE): Witness this date

A. B. LIST, CWO4, USCG
Personnel Officer

Continued on next page

CG-3307's for Assignment and Transfer, Continued

Entry Type: Assignment and Transfer (A&T-10)
Reference: Section 5.B, Reserve Policy Manual, RPM
Responsible Level: Unit
Entry:
(DATE): You are hereby transferred to the Inactive Ready Reserve (IRR) for the following reason (members request/commands request for failure to meet SELRES satisfactory participation/hardship). You do/do not have a reserve obligation and are/are not required to return to the SELRES. Any future request to return to the SELRES from the IRR will be at the discretion of the receiving command and CGPC (rpm).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I have been counseled and understand the reason(s) for the above action.

J. P. JONES

CG-3307's for Advancement and Reduction

Entry Type: Advancement and Reduction (A&R-1)
Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): YN2 Jones informed this date that he is a candidate for reduction in rate by reason of incompetence per Article 5-C-38, Personnel Manual, COMDTINST M1000.6 (SERIES). YN2 Jones' mark(s) (provide specifics on which mark(s) meet the reduction in rate criteria) for the period ending (date). Advised that he has three months from this date to demonstrate satisfactory progress and meet the requirements or Article 5-C-38 in order to retain his present rate, and that failure to do so will result in reduction in rate to YN3. A special performance evaluation will be completed at that time for the purpose of determining competency, particular areas that require improvement are: (provide specifics, etc.).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I have read and understand the above entry.

J. P. JONES

Entry Type: Advancement and Reduction (A&R-2)
Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): As a result of being above the cutoff for advancement to (E-7, E-8, or E-9) I understand that I will be required to meet the two year obligated service requirement per Article 5-C-25, Personnel Manual, COMDTINST M1000.6 (SERIES). I agree not to request voluntary retirement or early release to be effected prior to completion of required obligated service as stated above.

J. P. JONES

Continued on Next Page

CG-3307's for Advancement and Reduction, Continued

Entry Type: Advancement and Reduction (A&R-3)
Reference: Article 5-C-7b, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Correspondence course waived for the (date) servicewide competition due to non-availability of course as certified by CO, CG Institute letter of (date). When courses not previously available are developed, the Commanding Officer, Coast Guard Institute will publish the servicewide competition date for which the course will be available. This availability will be announced to all Educational Services Officers (ESO) as a change to the Correspondence Course Manual and to all units in the Commandant's Bulletin.

A. B. LIST, CWO4, USCG
Personnel Officer

Continued on Next Page

CG-3307's for Advancement and Reduction, Continued

Entry Type: Advancement and Reduction (A&R-4)
Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): YN2 Jones' three month observation period to satisfy the requirements of Article 5-C-38, Personnel Manual, COMDTINST M1000.6 (SERIES), completed this date. YN2 Jones has been determined to be incompetent in the rate of YN2. The required special evaluation was completed this date. Effective this date, YN2 Jones is being reduced to YN3.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I have read and understand the action taken to reduce me in rate effective this date.

J. P. JONES

Entry Type: Advancement and Reduction (A&R-5)
Reference: Article 5-C-16, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Recommendation and nomination for advancement and participation in the (month and year) servicewide competition for (rate) is withdrawn. (explain reason)

A. B. SEA, CAPT, USCG
Commanding Officer

Continued on Next Page

CG-3307's for Advancement and Reduction, Continued

Entry Type: Advancement and Reduction (A&R-6)
Reference: Article 1-D-10, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): I have read and understand Article 1-D-10f, Personnel Manual, COMDTINST M1000.6 (SERIES). I voluntarily elect to be removed from the eligibility lists for appointment to warrant grade. I understand that I will not be eligible to be a candidate for appointment to warrant grade for (2 or 5 (whichever is applicable)) years from the anniversary date of this election. I understand that I will be eligible to reapply as a candidate for appointment to warrant grade on or about (date).

J. P. JONES

Entry Type: Advancement and Reduction (A&R-7)
Reference: Article 1-D-10, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): I have read and understand Article 1-D-10f, Personnel Manual, COMDTINST M1000.6 (SERIES). I voluntarily elect to be removed from the eligibility lists for appointment to warrant grade. I understand that I will not be eligible to be a candidate for appointment to warrant grade until my personal hardship has been resolved.

J. P. JONES

CG-3307's for Performance and Discipline

Entry Type: Performance and Discipline (Weight) (P&D-1)
Reference: Sec. 5.B. (Pg. 5-1), Weight Instruction
Responsible Level: Unit
Entry:
(DATE): On this date, you were weighed and you are in compliance with your maximum allowance weight/body fat standard. Your measurements are: Height: _____ (inches), Wrist Size: _____ (inches), and Weight: _____ (pounds). Your age is:_____ and your percent body fat is: _____. In accordance with Weight Instruction, you are assigned a maximum allowable weight for screening purposes of _____ (pounds). Should you exceed this maximum allowable weight in the future, you will be required to complete a body fat determination. By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review Weight Instruction.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry, have been afforded the opportunity to review Weight Instruction and fully understand the action required.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (Weight) (P&D-2)
Reference: Sec. 5.E. (Pg. 5-3), Weight Instruction
Responsible Level: Unit
Entry:
(DATE): You have this date been determined to be _____ pounds overweight. Your measurements are: Height: _____ (inches), Wrist Size: _____ (inches), Weight: _____ (pounds). Your age is: _____ and your percent body fat is: _____. In accordance with Weight Instruction, you are hereby notified that you are required to lose _____ pounds or drop below _____% body fat by _____. If you fail to reach compliance by the end of this probationary period, you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).
Furthermore, until you are in compliance with weight or body fat standards, all actions listed in Chapter 3 of Weight Instruction will be withheld. By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review Weight Instruction.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry, have been afforded the opportunity to review Weight Instruction and fully understand the action required.

J. P. JONES

Entry Type: Performance and Discipline (Weight) (P&D-3)
Reference: Sec. 5.F. (Pg. 5-4), Weight Instruction
Responsible Level: Unit
Entry:
(DATE): On this date your probationary period has come to an end. You weighed _____ (pounds) or achieved _____% body fat and have successfully met the requirements of the Coast Guard Weight Program.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry and understand I have met the requirement of the Coast Guard Weight Program in accordance with Weight Instruction.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (Weight) (P&D-4)
Reference: Sec. 5.F. (Pg. 5-4), Weight Instruction
Responsible Level: Unit
Entry:
(DATE): On this date your probationary period has come to an end. You weighed _____ (pounds) and indicated _____ % body fat and you have not achieved your maximum allowable weight/body fat. In accordance with Weight Instruction you are hereby notified that you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry and fully understand the administrative action(s) being initiated because I do not meet the requirements of the Coast Guard Weight Program in accordance with Weight Instruction.

J. P. JONES

Entry Type: Performance and Discipline (P&D-5)
Reference: Section B-B, Personnel Manual, Weight Instruction
Responsible Level: Unit
Entry:
(DATE): Missed sailing of this vessel from (place of sailing) on (date) en route to (destination). Member had knowledge of the time movement was scheduled.

A. B. SEA, CAPT, USCG
Commanding Officer

(if vessel deploys for 10 or more days)
(DATE): Member's records and personal effects transferred to (name of unit).

A. B. SEA, CAPT, USCG
Commanding Officer

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-6)
Reference: None
Responsible Level: Unit
Entry: (General - positive)
NOTE: Entry must be member specific and describe who, what, when, where, why and how. Blanket entries describing generalities, which are photocopied for inclusion in many members' PDRs, are not authorized.
(DATE): Seaman Jones is commended for ……

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the-above entry.

J. P. JONES

Entry-Type: Performance and Discipline (P&D-7)
Reference: None
Responsible Level: Unit
Entry: (General - negative)
NOTE: Entry must be member specific and describe who, what, when, where, why and how. Blanket entries describing generalities, which are photocopied for inclusion in many members' PDRs, are not authorized.
(DATE): Petty Officer Jones was counseled for ……

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the-above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-8)
Reference: Section 8-A, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Necessary articles of the Uniform Code of Military Justice (UCMJ), and the Code of Conduct explained this date as required by section 8-A, Personnel Manual, COMDTINST M1000.6 (SERIES).

A. B. SEA, CAPT, USCG
Commanding Officer

Entry Type: Performance and Discipline (P&D-9)
Reference: Section 8-G, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Counseled concerning civil and moral obligations to provide continuous and adequate support of lawful dependents.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Entry Type: Performance and Discipline (P&D-10)
Reference: Section 8-F, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Unreliable due to failure to pay debts. (Describe circumstances surrounding entry-such as the dates, debts, and actions taken).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-11)
Reference: Section 8-F, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Unreliable due to unsatisfactory conduct of personal affairs and support of dependents. (State what other actions will be initiated, etc.).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above counseling and understand the actions being initiated.

J. P. JONES

Entry Type: Performance and Discipline (P&D-12)
Reference: Article B-H-5b(2), Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): (document formal counseling pertaining to improper relationships)

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-13)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): On (date) you were referred to the SS "A" school Command Drug and Alcohol Representative (CDAR) at TRACEN Petaluma for evaluation. On (date), you were consuming alcohol as a minor.
TRACEN security found open containers of alcohol in your vehicle during a routine check of the barracks parking lot. Security located you in your room and asked if you had consumed alcohol. You stated yes and a blood alcohol test was performed (BAC was .070). TRACEN regulations and state laws prohibit the use of alcohol by minors. Your use of alcohol as a minor shows questionable petty officer potential and will not be tolerated.
You were counseled on policies concerning alcohol use/abuse and the serious nature of this incident. You will be screened at CAAC NAS Alameda on (date). You are to continue to abstain from the use of alcohol until you are of legal age (age 21). No other action is pending.
This is considered your first alcohol incident for documentation purposes. Per Chapter 20 of the Personnel Manual, COMDTINST M1000.6 (SERIES), any further alcohol incidents or use of alcohol as a minor may result in your separation from the U.S. Coast Guard.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-14)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): On (date), you were cited by TRACEN security at a sobriety checkpoint for consuming alcohol as a minor. Your Blood Alcohol Content (BAC) was .166 and .165. This was in direct violation of your aftercare program and Coast Guard regulations.
On (date) you were referred to the TRACEN Command Drug and Alcohol Representative (CDAR) for evaluation. You were counseled on policies concerning alcohol use/abuse as a minor and your failure to follow your prescribed aftercare program.
This is considered your second alcohol incident for documentation purposes. As outlined in Chapter 20 of the Personnel Manual, COMDTINST M1000.6 (SERIES), you are being processed for separation from the U.S. Coast Guard due to continued alcohol abuse. You are advised that you may be eligible for further alcohol treatment by the Department of Veterans Affairs in the future.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-15)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): On (date) you were referred to the SS "A" school Command Drug and Alcohol Representative (CDAR) at TRACEN Petaluma for evaluation due to purchasing alcohol for a minor. This is in violation of TRACENINST 5353.1 (series) and the UCMJ, contributing to a minor's consumption of alcohol. No ongoing alcohol abuse problems were noted.
On (date) you allowed a minor to consume alcohol you had purchased. During a routine check of the barracks parking lot, TRACEN security found open containers of alcohol in the vehicle you had driven. Security located you in the owner's room and administered a blood alcohol test (BAC was .00).
This is not considered an alcohol incident, but is entered for documentation purposes only as a alcohol situation as outlined in Chapter 20 of the Personnel Manual, COMDTINST M1000.6 (SERIES). Your violation of the UCMJ is being investigated for disposition at captain’s mast.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Entry Type: Performance and Discipline (P&D-16)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): You have completed a two year aftercare program following outpatient treatment, as required by Chapter 20 of the Personnel Manual, COMDTINST M1000.6 (SERIES). I congratulate you on this monumental accomplishment.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-17)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): On (date) you were screened by the Navy Counseling And Assistance Center (CAAC) at Naval Shipyard Mare Island, CA. CAAC determined that you meet the criteria of being alcohol dependent and recommended you attend a level III, inpatient treatment program. On (date) you were seen by the TRACEN medical officer. At that time he issued a confirmatory diagnosis of alcohol dependency, DSMIII code 303.9 and concurred with CAAC's recommendation for level III inpatient treatment.
On (date) you were offered an opportunity to attend an inpatient treatment program at a Navy Alcohol Rehabilitation Center (ARC). You declined treatment due to your desire for separation from the Coast Guard.
You are advised that declining inpatient treatment prior to discharge may disqualify you for inpatient alcohol treatment by the Department of Veterans Affairs in the future.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-18)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): On (date) you successfully completed a three week level II outpatient treatment program at the Counseling And Assistance Center (CAAC), Naval Air Station, Alameda, CA. I congratulate you on your accomplishment and your perseverance for personal recovery. This has been a major step in taking charge of your life.
Aftercare is an important and mandatory part of this recovery process. The support you will find in your aftercare program will go far in helping to ensure your success.
Your aftercare program shall consist of, but not be limited to:

Abstinence from alcohol for six months.
A two-year evaluation of your performance, documented by quarterly aftercare reports.
Weekly meeting with the CDAR to monitor and support your recovery.

Attendance at a minimum of one (1) Alcoholics Anonymous (AA) meeting per week and a minimum of two (2) Adult Children of Alcoholics (ACOA) meetings per week (unit operations permitting).
Your failure to comply with this aftercare plan or involvement in a second alcohol related incident may result in your separation from the U.S. Coast Guard.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-19)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): On (date) you successfully completed a three-week outpatient treatment program at the Counseling and Assistance Center (CAAC), Naval Air Station, Alameda, CA. I congratulate you on your accomplishment and your perseverance for personal recovery. This has been a major step in taking charge of your life.
Upon completion of your treatment, CAAC Alameda determined that you meet the criteria for alcohol dependency and recommended you attend an inpatient alcohol treatment program for further counseling. Upon reporting to your new duty station, you will be screened by a medical doctor or medical officer to determine if additional treatment is warranted.
Aftercare is an important and mandatory part of your recovery effort. The support you will find in your aftercare program will go far in helping to ensure your success.
Your aftercare program shall consist of, but is not limited to:

Abstinence from alcohol.
A two-year evaluation of your performance, documented by quarterly aftercare reports.
Weekly meeting with the CDAR to monitor and support your recovery.

Attendance at a minimum of three (3) Alcoholics Anonymous (AA) meetings per week (unit operations permitting).
Your failure to comply with this aftercare plan or involvement in a second alcohol related incident may result in your separation from the U.S. Coast Guard.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-20)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): On (date) you successfully completed a six-week inpatient treatment program at the Alcohol Rehabilitation Center (ARC) at NAS Pearl Harbor, HI. I congratulate you on your accomplishment and your perseverance for personal recovery. This has been a major step in taking charge of your life.
Aftercare is an important and mandatory continuation of this recovery process and the support you will find in your aftercare program will go far in helping to ensure your success.
Your aftercare program shall consist of, but not be limited to:

Abstinence from alcohol indefinitely.
A two-year evaluation of your performance, documented by quarterly aftercare reports.
Weekly meetings with the CDAR/DAR to monitor and support your recovery.
Attendance at a minimum of two (2) Alcoholics Anonymous (AA) and two (2) narcotics anonymous (NA) twelve step meetings per week as recommended by ARC Pearl Harbor (unit operations permitting).
Random urinalysis screenings, at the discretion of the Commanding Officer.
Follow-up counseling through the Family Program Administrators office as recommended by ARC Pearl Harbor.

Failure to comply with this aftercare plan or involvement in any alcohol related incident will result in your separation from the U. S. Coast Guard

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-21)
Reference: Article 12-B-16 and 12-B-18, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): (document formal counseling pertaining to placing a member on probation, prior toe recommending discharge, per articles 12-B-16 and 12-B-18 of the Personnel Manual)

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Entry Type: Performance and Discipline (P&D-22)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): (summarize the basis for which a general discharge is awarded per section 12-B of the Personnel Manual)

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-23)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series)
Responsible Level: Unit
Entry:
(DATE): Passed (or Failed) the Deck Watch Officer (DWO) Rules of the Road exam on (date) with a score of _____%

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry

J. P. JONES

Entry Type: Performance and Discipline (P&D-24)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and Personnel Qualification Standard for Officer of the Deck, COMDTINST M3502.5
Responsible Level: Unit
Entry:
(DATE): Completed all prescribed training and oral examinations, and is certified as an underway (inport) Officer of the Deck in accordance with the Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and the OOD PQS, COMDTINST M3502.5

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Performance and Discipline, Continued

Entry Type: Performance and Discipline (P&D-25)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and Engineer Officer in Training (EOIT) PQS, COMDTINST M3502.11
Responsible Level: Unit
Entry:
(DATE): Completed all prescribed training and oral examinations, and is certified as an EOIT in accordance with the Cutter Training and Qualification Manual, COMDTINST 3502.4 (series) and the EOIT PQS, COMDTINST 3502.11 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Entry Type: Performance and Discipline (P&D-26)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series), Engineer Officer in Training (EOIT) PQS, COMDTINST M3502.11 (series), and Personnel Qualification Standard (PQS) for Officer of the Deck, COMDTINST M3502.5.
Responsible Level: Unit
Entry:
(DATE): Completed PQS or qualified/certified as (specify watchstation).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Separation

Entry Type: Separation (SEP-1)
Reference: Section 3-C-3, Personnel and Pay Procedures Manual, PPCINST M1000.2 (series)
Responsible Level: Unit
Entry:
(DATE): I agree to allow the withholding of a substantial portion of my final pay on my date of separation. I also understand that I may owe the government money, and the government will initiate collection action for any money due.

J. P. JONES

Entry Type: Separation (SEP-2)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible level: Unit
Entry:
(DATE): I have read and been counseled on the contents of Article 12-B-53 of the Personnel Manual, COMDTINST M1000.6 (SERIES) concerning my rights on separation from the Coast Guard. I understand my rights as described therein and have had all of my questions answered.

I have been advised IAW COMDTINST 7220.1 (series) that since I am opting for separation at this time, should I later elect to reenlist, I must do so within three (3) months of discharge to be eligible for a Selective Reenlistment Bonus (SRB), provided that on the date of reenlistment my rating has a multiple listed in the ALCOAST then in effect.

J. P. JONES

Entry Type: Separation (SEP-3)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): The provisions of Article 12-B-3, Personnel Manual, COMDTINST M1000.6 (SERIES) concerning types of discharge certificates, their basis for issuance, the possible effects of various veterans' benefits and related matters have been explained to me this date.

J. P. JONES

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-4)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES). Member is recommended for reenlistment. Member has stated intentions (not to reenlist) (to reenlist) (undecided). The required Assignment Data (CG-3698A) has been submitted.

A. B. SEA, CAPT, USCG
Commanding Officer

Entry Type: Separation (SEP-5)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES). In accordance with (reference message traffic) you are recommended for reenlistment. You have stated your intention (to reenlist) (to extend) (not to reenlist). You have been counseled that failure to extend or reenlist for _____ years prior to (date) will result in revocation of the reenlistment authorization and separation upon EOE/EAOS is mandatory. Members who are authorized reenlistment and choose not to do so are required to serve any additional obligated service incurred in addition to their original enlistment. You will be discharged/RELAD on (date).

A. B. SEA, CAPT, USCG
Commanding Officer

J. P. JONES

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-6)
Reference: Article 12-B-47, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(complete the following entry when a citizen of the Republic of the Philippines reenlists immediately following separation or executes a voluntary extension of enlistment):
(DATE): I have been properly advised and counseled regarding the loss of entitlement to file for U.S. citizenship unless such reenlistment or extension of enlistment actually takes place in the United States or its stated possessions (American Samoa, Swans Island, Guam, Puerto Rico, and the Virgin Islands).

J. P. JONES

Entry Type: Separation (SEP-7)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: Unit
Entry:
(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES). Member is not recommended for reenlistment because (give reason(s)). The required E-Resume has been submitted in Direct Access.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge that I have been informed that I am not being recommended for reenlistment and given the reason(s) for this action. I understand that I may submit a written appeal via the chain of command to Commander (MPC-epm). This appeal must be submitted within 15 days of this notification and my command will furnish clerical assistance, if I desire to submit an appeal.

J. P. JONES

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-8)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Discharged from active duty without immediate reenlistment this date by reason of (expiration of enlistment, misconduct, etc.). Member provided Certificate of Release or Discharge from Active Duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Member counseled regarding (1) reenlistment opportunities including SRB entitlements; (2) Thrift Savings Plan (TSP) withdrawal options and procedures; (3) provisions of COMDTINST 1760.7 (series); and maintaining continuous service status.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Entry Type: Separation (SEP-9)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Discharged this date by reason of (expiration of enlistment or convenience of the government) and immediately reenlisted. Certificate of Release or Discharge from Active Duty form (DD-214) not issued. The following information on this enlistment/reenlistment applies:
Period of service.
Reenlistment code.
Separation Program Designator (SPD).
Time lost.
(NOTE: the above data is necessary to compute the final DD-214 since it will cover multiple enlistment/reenlistment periods.)

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-10)
Reference: Section 12-B & 18-D-4 Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Released from active duty due to expiration of enlistment and immediately transferred to the Coast Guard reserve to complete obligation of military service. Member provided Certificate of Release or Discharge from active duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Member counseled regarding (1) reenlistment opportunities including SRB entitlements and Coast Guard reserve opportunities/benefits; (2) Thrift Savings Plan (TSP) withdrawal options and procedures an/or opportunity to contribute to the TSP within 60 days of joining the Ready Reserve; (3) provisions of COMDTINST 1760.7 (series); (4) liability for SGLI premiums unless member declines coverage or joins the Individual Ready Reserve (IRR); and maintaining continuous service status.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Entry Type: Separation (SEP-11)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Retired from active duty this date and effective (date) placed on the inactive retired rolls. Member provided Certificate of Release or Discharge from Active Duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES) (series). Member counseled regarding retirement rights, benefits, and responsibilities.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-12)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): As outlined in Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES), I understand that in order to remain in a continuous service status, reenlistment must occur within three months from the date of discharge/separation. However, the rate held at the time of discharge/separation may not be the rate at which reenlisted unless the rate is on the open rate list at the time of reenlistment. I hereby acknowledge receipt of my separation documents.

J. P. JONES

Entry Type: Separation (SEP-13)
Reference: Section 12-B-11-f, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: SPO
Entry:
(DATE): I [member's name], desire to be separated from the Coast Guard on my normal expiration of active obligated service date. I understand I will not be eligible for further follow-up studies or treatment at a U.S. Uniformed Serviced medical facility or for disability benefits under laws the Coast Guard administers, and any further treatment or benefits would be under the Veterans' Administration's jurisdiction.

Member sign and date

Officer witness, sign and date

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-14)
Reference: Section 12-B-ll.f, Personnel Manual, COMDTINST M1000.6 (SERIES)
Responsible Level: SPO
Entry:
(DATE): I [member's name], desire to be separated from the Coast Guard despite the fact separation may prejudice any rights or benefits to which I may be entitled as a result of physical evaluation board hearings under 10 U.S.C. 61. I have been duly advised of my rights in this matter and request the Coast Guard to discharge me as soon as possible without further hearing and without disability, retirement, or severance pay and without any compensation whatsoever. I understand I am not required and am under no obligation to give this statement and I hereby certify I give this statement voluntarily.

Member sign and date	Officer witness, sign and date

Entry Type: Separation USCGR (Inactive) (SEP-15)
Reference: Section 12-B, Reserve Administration and Training Manual, COMDTINST M1001.27 (series) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Discharged this date from USCGR inactive duty by reason of (fulfillment of service obligation, expiration of enlistment, or convenience of the government) and immediately reenlisted in the (regular or reserve). Member provided USCGR discharge certificate and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Member counseled regarding (1) reenlistment opportunities including SRB entitlements; (2) opportunity to contribute to the Thrift Savings Plan (TSP) within 60 days of joining Active Duty or the Ready Reserve; (3) provisions of COMDTINST 1760.7 (series); and maintaining continuous service status.

(DATE): Reenlisted this date in the (USCG or USCGR).

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entries.

J. P. JONES

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation USCGR (Inactive) (SEP-16)
Reference: Section 12-B, Reserve Administration and Training Manual, COMDTINST M1001.27 (series) and DD 214 Manual.
Responsible Level: RSPO
Entry:
(DATE): Discharged from USCGR inactive duty without immediate reenlistment this date by reason of (fulfillment of service obligation, expiration of enlistment, or convenience of the government). Member provided USCGR discharge certificate and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Documents mailed this date to: (address)

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Entry Type: Separation from Selected Reserve (SELRES)(SEP-17)
Reference: COMDTINST 1001.37 (series)
Responsible Level: RSPO
Entry:
(DATE): Member counseled this date upon assignment to the Individual Ready Reserve (IRR), regarding possible entitlement to/ineligibility to Reserve Transition benefits (RTB). Commandant (G-RSM) will make final determination of RTB entitlement.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-18)
Reference: COMDTINST 1040.10 (series)
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).
(for E-5 to E-9)
I understand that based on my present pay grade of _____, my Professional Growth Point (PGP) is ____ (#) ____years of military service. My present PGP is ____(date)____. I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).
I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (MPC-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

SIGNATURE WITNESS

Entry Type: Separation (SEP-19)
Reference: COMDTINST 1040.10 (series)
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).
(for E-3 to E-4)
I understand that based on my present pay grade of _____, my Professional Growth Point (PGP) is 7 years of Coast Guard service or 10 years military service, whichever is greater. My present PGP is _____(date) _____ I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).
I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (MPC-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

SIGNATURE WITNESS

Continued on Next Page

CG-3307's for Separation, Continued

Entry Type: Separation (SEP-20)
Reference: COMDTINST 1040.10 (series)
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).

(for E-2)

I understand that based on my present pay grade of E-2, my Professional Growth Point (PGP) is 4 years of military service. My present PGP is _____(date)_____. I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).
I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander-(MPC-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

SIGNATURE WITNESS

Entry Type: Separation (SEP-21)
Reference: COMDTINST 1910.1 (series)
Responsible Level: Unit
Entry:
(DATE): As a condition of receiving separation pay under 10 U.S.C. 1174, I hereby agree to enlist or extend in the ready reserve for a period of 3 years following my discharge or release from active duty in addition to any remaining military service obligation. I understand this agreement is made without regard to the reason for my separation or my eligibility for affiliation with the ready reserve. Further, should I be accepted for enlistment or extension in the Coast Guard reserve, I must execute the extension or enlistment contract as a condition of qualifying for separation pay. I understand that if I enlist in the ready reserve I may request to become a member of the selected reserve by applying for affiliation to the chief, readiness and reserve division of the district in which I live. I also agree if accepted that I will keep the district commander (r) in my area informed of any changes in my address, physical status, or dependency status. I understand that if I stay in the reserve and later retire, my retired pay will be reduced by the amount of enlisted separation payments received.

SIGNATURE WITNESS

CG-3307's for Selective Reenlistment Bonus

Entry Type: Selective Reenlistment Bonus (SRB-1)
Reference: COMDTINST M1000.6 (SERIES) 3-C
Responsible Level: Unit
Entry:
(DATE): I have been advised that my current Selective Reenlistment Bonus (SRB) multiple is _____and is listed in ALDIST _____, which has been made available to me.
I am eligible to reenlist/extend my enlistment up to a maximum of _____ years. My SRB will be computed based on _____ months of newly obligated service.
I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (SERIES) 3-C. I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

(Signature of Member/Date) (Signature of Counselor)

Entry Type: Selective Reenlistment Bonus (SRB-2)
Reference: COMDTINST M1000.6 (SERIES) 3-C
Responsible Level: Unit
Entry:
(DATE): I have been advised that my current Selective Reenlistment Bonus (SRB) multiple is _____and is listed in ALCOAST 306/04 _____, which has been made available to me.
I am eligible to reenlist/extend my enlistment up to a maximum of _____ years. My SRB will be computed based on _____ months of newly obligated service.
I must reenlist on or 3 months prior to (date), which is my (6th & 10th) active duty anniversary date, in order to receive a zone (A, B, or C) SRB.
I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (SERIES) 3-C. I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

(Signature of Member/Date) (Signature of Counselor)

Continued on Next Page

CG-3307's for Selective Reenlistment Bonus, Continued

Entry Type: Selective Reenlistment Bonus (SRB-3)
Reference: COMDTINST M1000.6 (SERIES) 3-C
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (SERIES) 3-C.
I further acknowledge that I have been advised of the effects on my SRB computation/payment if I enter into an agreement to extend my enlistment.

(Signature of Member/Date) (Signature of Counselor)

Entry Type: Selective Reenlistment Bonus (SRB-4)
Reference: COMDTINST M1000.6 (SERIES) 3-C
Responsible Level: Unit
Entry:
(DATE): I have been advised and am aware that I will not be eligible and will not begin receiving my SRB payment for my new rating until the operative date of my extension or reenlistment after attaining my new rating.

(Signature of Member/Date) (Signature of Counselor)

Selective Reserve (SELRES) Enlisted Bonus Programs

Entry Type: Selective Reserve Reenlistment/Extension Bonus (BON-1)
Reference: COMDTINST 7220.1 (series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I am currently eligible for a Level ___ Selective Reserve Reenlistment Bonus as listed in ALCOAST ___, which has been made available to me.

I am eligible to reenlist/extend my enlistment up to a maximum of ___ years. My bonus will be computed based on ___ months of newly obligated service.

I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1 (series). I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

(Signature of Member/Date) (Signature of Counselor)

Entry Type: Selective Reserve Enlistment Bonus (BON-2)
Reference: COMDTINST 7220.1 (series)
Responsible Level: Recruiting Office
Entry:
(DATE): I have been advised that I am currently eligible for a Level ___ Selective Reserve Enlistment Bonus as listed in ALCOAST ___, which has been made available to me.

I am eligible to enlist for up to a maximum of ____ years. My bonus will be computed based on ____ months of obligated service.

I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1 (series). I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

(Signature of Member/Date) (Signature of Counselor)

Entry Type: Selective Reserve Affiliation Bonus (BON-4)
Reference: COMDTINST 7220.1 (series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I am currently eligible for a Level ___ Selective Reserve Affiliation Bonus as listed in ALCOAST ___, which has been made available to me.

I am eligible to serve up to a maximum of ____ months. My bonus will be computed based on ____ months of obligated service.

I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1 (series). I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

(Signature of Member/Date) (Signature of Counselor)

Continued on Next Page

Selective Reserve (SELRES) Enlisted Bonus Programs,
Continued

Entry Type: Performance and Discipline (BON-5)
Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1A (series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I will be placed in a period of authorized absence for 12 months due to involuntary recall to active duty under 10 USC 12302. During this 12-month period, I will retain my current SELRES bonus eligibility.

I further acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1A (series).

(Signature of Member/Date) (Signature of Counselor)

Entry Type: Performance and Discipline (BON-6)
Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1A (series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I will be authorized a period of non-availability and temporarily assigned to the Active Status Pool (ASP) for 12 months due to (temporary medical disability, temporary work conflict, or documented personal hardship).

Upon completion of the 12-month period, I will be required to extend my enlistment in the Ready Reserve to serve my full contract period in the SELRES in order to receive my total bonus entitlement.

Failure to extend for the necessary additional service or continued assignment in the ASP over 12 months will result in my bonus eligibility being adjusted for time spent in the ASP.

I further acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1A (series).

(Signature of Member/Date) (Signature of Counselor)

Personnel Casualty Report Message

When notified of a Personnel Casualty, IMMEDIATELY call Flag Plot at (202) 267-2100. Send this message within 4 hours of notification.

MESSAGE ROUTING TO REPORT AN ACTIVE DUTY, RESERVE, OR AUXILIARY DEATH, OR THE DEATH OF A MEMBER WHO DIED WITHIN 120 DAYS OF SEPARATION:

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO CCGDNUMBER ANYWHERE US (district where Next Of Kin resides)
COGARD INTSUPRTCOM ANYWHERE USA (ISC where Next Of Kin resides)
CCGDNUMBER ANYWHERE US (district where member's unit is located, if different from "To" line)
COGARD INTSUPRTCOM ANYWHERE USA (ISC where casualty occurs)
COGARD UNIT ANYWHERE US (member's unit, if different than "From" line)
COMDT COGARD WASHINGTON DC//G-WPM/G-WKW/G-O-CGIS// (Omit G-O-CGIS when death occurs in a hospital due to natural causes)
INFO COGARD PSC TOPEKA KS
COMCOGARD PERSCOM WASHINGTON DC//EPM or OPM//
FHTNC NORFOLK VA (Fleet Home Town News Center)
CCGDNUMBER ANYWHERE US (district where unit sending this msg is located, if different from above)
COGARD MLC ANYWHERE US (if member's unit was a MLC unit)
COGARD MLC LANT NORFOLK VA //KSE//

COMCOGARD TISCOM//HONOR GUARD OPS//

MESSAGE ROUTING TO REPORT A DEPENDENT DEATH

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO COMDT COGARD WASHINGTON DC//G-WPM/G-WKW//
COGARD INTSUPRTCOM ANYWHERE USA (ISC where member resides)
INFO COGARD PSC TOPEKA KS

MESSAGE ROUTING TO REPORT A RETIREE DEATH

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO COGARD PSC TOPEKA KS//RAS//
INFO COMDT COGARD WASHINGTON DC//G-WPM//

Continued on next page

Personnel Casualty Report Message, Continued

ACCT CGW2GARC
BT
UNCLAS FOUO //N01770//
SUBJ: PERSONNEL CASUALTY REPORT
1. THE FOLLOWING INFO IS PROVIDED:

ALPHA. **Name**. Indicate member's full name, rank/rate, SSN, and branch of service. In the case of a dependent's death, first give the dependent's full name and relationship to member, and then give the member's full name, rank/rate, SSN, and branch of service.

BRAVO. **Status.** Indicate person's status, (e.g., active duty, active duty for training (ADT), Inactive Duty for Training (IDT), retired, dependent, absentee since, etc). In the case of reserve members, indicate whether the member was on active duty for training (ADT) or inactive duty for training (IDT), and the period of training authorized including hour and date. If the casualty occurred while traveling to or from training, indicate the time of the member's departure, scheduled arrival time, method of travel, itinerary, and immediate cause of death. Fax a complete copy of the reservist's order immediately to Commandant (G-WPM) @ 202-267-4823.

CHARLIE. **Type of Casualty**. Indicate whether casualty was caused by hostile or non-hostile actions. Also state whether member is Alive, Dead or Missing. If alive give the prognosis in case of illness or injury. If dead, state the cause such as accident, illness, suicide, killed in action, or died of wounds. When applicable, state how identification of remains was established. If missing, give cause of disappearance. Do not use indefinite statements such as "lost overboard" or "missing and presumed dead". If it cannot be determined if member is deceased, see Article 11-A-4, Coast Guard Personnel Manual, COMDTINST M1000.6 (series).

Continued on next page

Personnel Casualty Report Message, Continued

DELTA. Date, Time, Place, Circumstances, and Cause. Give a concise description (avoid gory details) to provide means for explaining the casualty to the family and for processing survivor benefits. Use local time. If the casualty occurred at sea or at a remote area, state latitude and longitude, unless security precludes. If death was caused from injuries, state the cause (i.e. an automobile or plane accident, or other cause.) If possible, give brief additional information to indicate whether or not the injuries were incurred as a result of operational duty, (e.g., accidental electrocution while engaged in repair work aboard ship). If death was caused by gunshot wound, indicate whether accidentally or intentionally caused. If death resulted from drowning, indicate whether due to falling overboard, recreational swimming, etc. If death resulted from flight in a Coast Guard aircraft, report circumstances as follows: status of individual, (e.g., pilot, crewmember, passenger; model of aircraft); and purpose and type of flight, (e.g., whether "operational" or "other than operational"). Whenever a determination of the cause of death is delayed pending an autopsy or toxicological examination, the finding shall be furnished by supplemental message as soon as possible. If the member is missing, include a statement of the status of the search or the impracticability of conducting a search.

ECHO. Location and Disposition of Remains. Give complete name, address, and phone number of morgue or funeral establishment where remains are located. If remains are to be transferred to another establishment, give name, address, and phone number of such establishment, when transfer will be made, and any special disposition instructions the next of kin should know. If remains were not recovered, give the status or the search.

FOXTROT. Full Name, Address, and Relationship of Next of Kin (NOK). Report NOK information as found on the BAH/Dependency/Emergency Data (CG-4170A). If dependents are injured or killed in the same accident, state their present whereabouts and condition if applicable.

GOLF. Notification of Next of Kin (NOK). State Primary NOK – Yes or NO, Secondary NOK – Yes or NO, and the date and local time of contact to indicate whether primary and secondary NOK named on the member's (CG-4170A) have been officially notified. . If notification has not been made, advise what action is being taken to notify next of kin.

HOTEL. Board of Investigation. Enter Yes or No to indicates whether a board of investigation will be convened. Consult Administrative Investigations Manual COMDTINST M5830.1

INDIA. BAH/Dependency/Emergency Data. Indicate date of current BAH/Dependency/Emergency Data (Direct-Access Report) and CG PSC-2020D (Designation of Beneficiaries) executed by member.

Continued on next page

Personnel Casualty Report Message, Continued

JULIETT. Beneficiary for Death Gratuity. Provide name and address of death gratuity beneficiary, as shown on the member's current Designation of Beneficiaries (CG PSC 2020D). State N/A for spouse and dependent deaths.

KILO. Line of Duty Determination. All active duty deaths (illness, disease, accidents, car wrecks, and suicide) are considered to have occurred in the "Line of Duty." State here "Commanding Officer has determined death to be "Line of Duty." Use N/A for spouse and dependent deaths.

LIMA. Servicemembers' Group Life Insurance (SGLI). In the case of a member's death, indicate if the member is covered by SGLI, the amount of coverage, and the beneficiary information listed on the member's most recent VA Form SGLV-8286. Also indicate whether the member was in an AWOL status for 31 days or more at the time of the death. In the case of a Spouse's death, indicate if the member had family SGLI coverage and the amount. In the case of a dependent child's death, indicate if the member had SGLI coverage.

MIKE. Beneficiary for Pay and Allowances. Indicate name and address of beneficiary listed on Designation of Beneficiaries (CG PSC 2020D) for unpaid pay and allowances. Use N/A for spouse and dependent deaths.

NOVEMBER. Predeceased or Prior Spouse Cases. If the member was married, and either (1) the member's spouse predeceased the member, or (2) the member's spouse died in the same accident as the member, or (3) the member is divorced: indicate the member's current marital status, the name of the current spouse, the name of the former spouse(s), and the name of the member's current next of kin. Use N/A for spouse and dependent deaths.

OSCAR. Identification of a Potential Third Party Claim. If the member or the member's dependents are injured and receive medical care at Government expense or through TRICARE, **and** it appears that a third party is at fault, identify the third party involved.

2. [Unit POC and Phone #]
BT
NNN

Next of Kin Notification (NOK)

Coast Guard Policy is to have a Coast Guard member notify the NOK of a deceased member in person. If this is not feasible due to distance, contact state or local police and ask them to notify the NOK. The NOK of a missing or seriously ill member may be notified by phone. Notifications are only made during the hours of 0700 to 2400, unless the NOK may find out through another source. In all situations, notify the NOK by 1) Type out the appropriate letter, listed below, 2) Contact and determine you are talking to the NOK (in person for death, by phone for missing or illness), 3) Move to a private place (Wait until inside the home, if notifying NOK in person or have NOK move to a quiet phone), 4) Read the first paragraph to the NOK, 5) Give or mail the letter to the NOK.

Death of Member - Letter Used to Notify NOK

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

1) I deeply regret to inform you on behalf of the United States Coast Guard that your (specify relationship, rate/rank, SSN) died on (date) at/aboard (place) as a result of (provide a brief description of cause of death). Your (specify relationship) died while in the service of his/her country. Please accept my most heartfelt sympathy in your great loss.

2) We hope we can be of assistance to you in your bereavement. We will transport the remains, with an escort, to any place you designate. Also, we will allow you an amount toward funeral and interment expenses not to exceed $6900, for burial in a private cemetery or $5,500 if remains are consigned to a funeral director prior to interment in a national cemetery or $600 dollars if remains are consigned directly to a national cemetery.

3. (Name and Phone # of CACO or DAO) has been assigned to give you every possible assistance.

4) Please be assured of the heartfelt sympathy and prayers of your (specify relationship) shipmates. A letter setting forth the circumstances of death will follow.

(Name, rate/rank, and title of unit commanding officer)

Continued on next page

Next of Kin Notification (NOK), Continued

Missing - Letter Used to notify NOK

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

1) I deeply regret to inform you on behalf of the United States Coast Guard that your (specify relationship, name, rate/rank, SSN) is missing as a result of (provide brief description of the cause and circumstances concerning missing status). The incident in which your (specify relationship) was involved occurred on (date) at (or in the vicinity of) (show location of incident). Your great anxiety in this situation is understood and when further information is available concerning results of the search now in progress you will be promptly notified.
2) You may be assured that every effort is being made with personnel and facilities available to locate your (specify relationship).
4) 3) (Name and Phone # of CG Contact) has been assigned to give you every possible assistance. Please be assured of the heartfelt sympathy and prayers of your (specify relationship) shipmates at this time of heartache and uncertainty. I join you in prayer for (his/her) eventual recovery alive.

(Name, rate/rank, and title of unit commanding officer)

Continued on next page

Next of Kin Notification (NOK), Continued

Critical Injury or Illness - Letter Used to notify NOK

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

1) With concern I regret to inform you on behalf of the United States Coast Guard that your (specify relationship, name, rate/rank, SSN) is (critically or seriously ill or injured) as a result of (provide brief description of circumstances of illness or injury). This occurred on (date) at (specify location). Your (specify relationship) is presently hospitalized at/on board (show location of place hospitalized) where you are assured that (he/she) is receiving the best possible medical care. Your great anxiety is understood and when further reports are available concerning (his/her) condition you will be informed.

2) (Name and Phone # of CG Contact) has been assigned to give you every possible assistance.

3) Please be assured of the heartfelt concern and prayers of your (specify relationship) shipmates at this time of uncertainty. I join you in prayer for his/her speedy recovery.

(Name, rate/rank, and title of unit commanding officer)

Continued on next page

Next of Kin Notification (NOK), Continued

Commanding Officer's Letter to the Next of Kin **(must be written within 48 hours of the member's death)**

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

Please accept my deepest sympathy on the death of your (Relationship), (Full Name and Rank of Deceased) and allow me to tell you what we know about the circumstances surrounding (His/her) death. [Provide sufficient facts concerning the casualty, search attempts, medical care, etc. to satisfactorily answer all immediate questions in the minds of the next of kin. See Article 11A-8, Coast Guard Personnel Manual, COMDTINST M1000.6 (series).]

[If member was missing and searches have not located the member's remains, include: "We regret that the extensive search for your (indicate relationship) has met with negative results" or "We regret that the extensive search failed to locate any trace of your (specify relationship)." Do not make any statement concerning termination of any searches.]

If you have any questions or need any assistance, please feel free to contact me at (999) 555-1234.

Sincerely,

M. R. ROBERTS
Lieutenant, U. S. Coast Guard
Commanding Officer

Commanding Officer's Letter Request for Death Determination When Member is Missing and No Conclusive Evidence of Death Exists

1771
15 May 2002

MEMORANDUM

From: M. R. Roberts
CG GP Anywhere

To COMDT (G-L)

Thru: (1) CGD Fourteen (a)
(2) MLCPAC (l)

Subj: INCONCLUSIVE EVIDENCE OF DEATH

Ref: (a) Coast Guard Personnel Manual, COMDTINST M1000.6 (series) 1.

In accordance with reference (a), a death status determination is requested in the case of (indicate rate/rank, name, SSN, branch of service) who is missing. Remains have not been recovered.

2. [Provide summary of circumstances of disappearance.]

3. [Provide all available details surrounding search efforts, including: the area of the search (latitude and longitude, and distance from nearest land); local conditions (such as depth of water, temperatures, other climatic conditions, and terrain); and extent of searches made.]

4. [Provide a summary of statements of survivors or of other personnel who may have pertinent information concerning the circumstances.]

5. [Provide the commanding officer's opinion and recommendation as to the possibility of survival.]

M. R. Roberts
CG GP Anywhere

Encl: (1) Supporting documentation

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Direct-Access Procedures

Purpose

This enclosure establishes the Direct-Access online manual as the official reference for reporting personnel events and transactions.

Policy

Direct-Access is a key competent in the U. S. Coast Guard's personnel and pay system. The procedures set forth in the Direct-Access online manual for maintaining personnel data must be followed by all Coast Guard personnel and their supervisors, unit administrative staffs and servicing personnel offices (SPOs).

Accessing the Online Manual

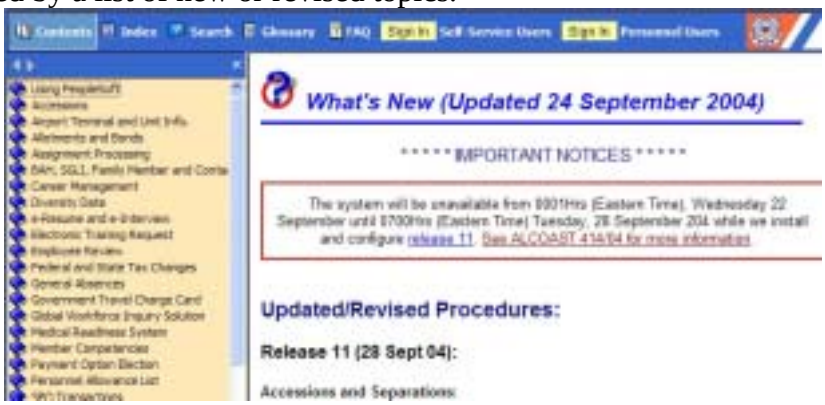
The online manual can be accessed from within the Direct-Access application, via the Coast Guard Data Network (CGDN) or over the Internet.

- To access the online manual from within Direct-Access you must first navigate to a data entry page then click on the **Help** link in navigation header of the page (shown below).

- To access the online manual via the CGDN start Internet Explorer and enter http://cgweb.uscg.mil/g-w/psc/ps in the address field.
- To access the online manual over the internet start your web browser and enter http://www.uscg.mil/hq/psc/ps in the address field.

About the Online Manual

The Direct-Access online manual is updated regularly. The first page displays the date the manual. Important notices are posted beneath the revision date, followed by a list of new or revised topics.



Continued on next page

Direct-Access Procedures, Continued

Contents of the Online Manual

Help topics are organized into "books" covering the PeopleSoft modules that have been implemented in Direct-Access. Click on one of the book icons in left panel of this window to explore the topics available. Click on a topic icon to open the topic.

Tip: You only need to click once. The manual is a web page, you don't need to double-click items to open them.

Each book contains a brief introductory topic, explaining the capabilities of the PeopleSoft module. Subsequent topics provide procedures for accomplishing specific tasks or viewing data.

The list below is a sample of the topics listed under the “Using PeopleSoft” book:

- Using PeopleSoft
  - Welcome
  - How to Change Your Password
  - Using this help file
  - Training
  - Tutorials and Demonstrations
  - Tutorials for SPO Users
  - Quick Reference Guides
  - Frequently Asked Questions
  - About Employee ID Numbers
  - Signing In
  - Basic Navigation
  - How to Create Shortcuts
  - Search Tips
  - Keyboard Shortcuts
  - Internet Explorer Keyboard Shortcuts
  - Copying
  - Printing
  - PeopleSoft Action Types
  - Using Effective Dates
  - Operator ID Lookup
  - Guidelines for Granting Command Access
  - SPO Access Guidelines
  - Using Process Scheduler Web Option
  - Menu Paths

Continued on next page

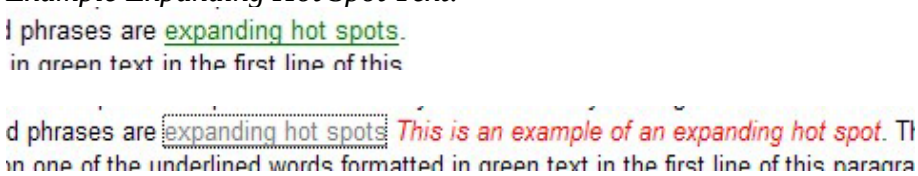
Direct-Access Procedures, Continued

Conventions Used in the Online Manual

Links are formatted as follows:

- Words and phrases in underlined blue letters are links to other parts of the manual or other Internet/Internet web pages. Links to other web pages will open in a new window, while links to other parts of the manual will open in the window you are currently viewing.
- Some underlined words and phrases are expanding hot spots. These are used to introduce terms and acronyms you may not be familiar with. Clicking on one of the underlined words formatted in green text will display the additional information. Clicking on the underlined word again will dismiss the expanded text.

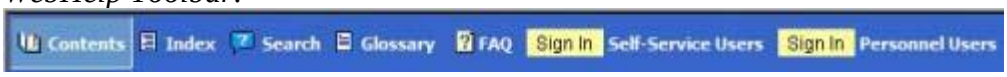
  Example Expanding Hot Spot Text:

Index, Search and Glossary

Use the ***Index, Search and Glossary*** features of the online manual to quickly locate information. These features are accessed via the toolbar at the top left part of your screen:

WebHelp Toolbar:



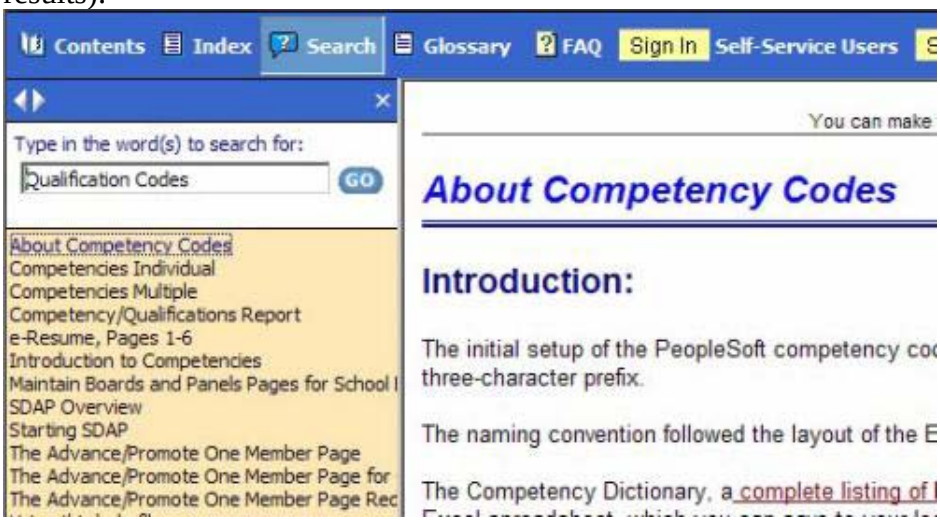
Using Search: Click the button then enter your query in the search text field and click the button. A list of topics matching your search will display in the area below the toolbar. Click on a topic title to view it.

Continued on next page

Direct-Access Procedures, Continued

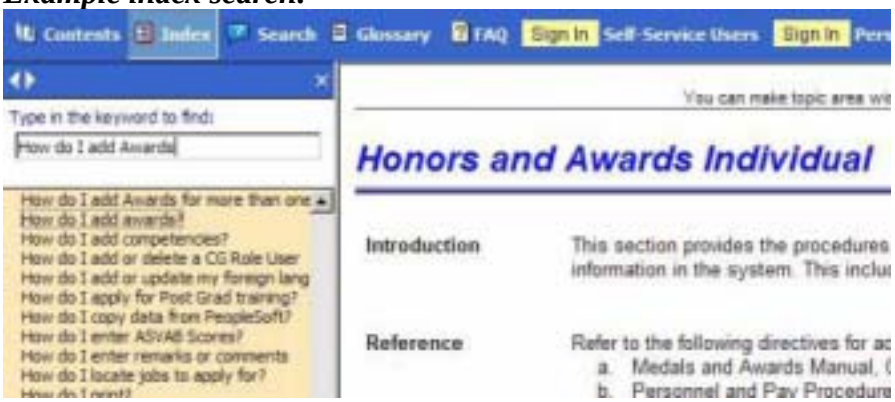
Index, Search and Glossary (cont'd)

Example search and results (Note how we used the old term "Qualification Codes" but were directed to "Competencies" (the new term) in the search results):



Using the Index: The index works much like the search feature. Click the button, type your query into the text filed that appears just beneath the tool bar. You can also scroll through the list without entering a keyword.

Example index search:



Using the Glossary: The Glossary can be used to lookup new terms you may not be familiar with. Simply click the button and scroll through the list of terms displayed just below the toolbar. Select a term and read the definition in the bottom half of the panel.

STATE & U.S. POSSESSION ABBREVIATION CODES

CODE	STATE	CODE	STATE
AL	Alabama	NJ	New Jersey
AK	Alaska	NM	New Mexico
AZ	Arizona	NY	New York
AR	Arkansas	NC	North Carolina
CA	California	ND	North Dakota
CO	Colorado	OH	Ohio
CT	Connecticut	OK	Oklahoma
DE	Delaware	OR	Oregon
DC	District of Columbia	PA	Pennsylvania
FL	Florida	RI	Rhode Island
GA	Georgia	SC	South Carolina
HI	Hawaii	SD	South Dakota
ID	Idaho	TN	Tennessee
IL	Illinois	TX	Texas
IN	Indiana	UT	Utah
IA	Iowa	VT	Vermont
KS	Kansas	VA	Virginia
KY	Kentucky	WI	Wisconsin
LA	Louisiana	WA	Washington
ME	Maine	WV	West Virginia
MD	Maryland	WY	Wyoming
MA	Massachusetts		
MI	Michigan		
MN	Minnesota	AQ	American Samoa
MS	Mississippi	GU	Guam
MO	Missouri	PR	Puerto Rico
MT	Montana	VI	Virgin Islands
NE	Nebraska	AE	European FPOs/APOs
NV	Nevada	AA	Americas FPOs/APOs
NH	New Hampshire	AP	Pacific FPOs/APOs
		OO	All others

FOREIGN COUNTRY ABBREVIATION CODES

CODE	COUNTRY
AF	Afghanistan
AL	Albania
AG	Algeria
AN	Andorra
AO	Angola
AV	Anguilla
AC	Antigua & Barbuda
AR	Argentina
AM	Armenia
AS	Australia
AU	Austria
AJ	Azerbaijan
AZ	Azores
BF	Bahamas
BA	Bahrain
BG	Bangladesh
BB	Barbados
BO	Belarus
BE	Belgium
BH	Belize
BN	Benin
BD	Bermuda
BT	Bhutan
BL	Bolivia
BK	Bosnia & Herzegovina
BC	Botswana
BR	Brazil
BX	Brunei
BU	Bulgaria
UV	Burkina Faso (former Upper Volta)
BM	Burma
BY	Burundi
CB	Cambodia
CM	Cameroon
CA	Canada
CV	Cape Verde
CT	Central African Republic
CD	Chad
CI	Chile
CH	China
CO	Colombia
CN	Comoros
CF	Congo (Brazzaville)
CG	Congo (Kinshasa)
CS	Costa Rica
IV	Cote d'Ivoire
HR	Croatia
CU	Cuba
CY	Cyprus
EZ	Czech Republic
DA	Denmark
DJ	Dijibouti

FOREIGN COUNTRY ABBREVIATION CODES (continued)

CODE	COUNTRY
DO	Dominica
DR	Dominican Republic
EC	Ecuador
EG	Egypt
ES	El Salvador
EK	Equatorial Guinea
ER	Eritrea
EN	Estonia
ET	Ethiopia
FA	Falkland Islands
FJ	Fiji
FI	Finland
FR	France
FG	French Guiana
GB	Gabon
GA	Gambia, The
GG	Georgia
GM	Germany
GH	Ghana
GI	Gibraltar
GR	Greece
GL	Greenland
GJ	Grenada
GT	Guatemala
GV	Guinea
PU	Guinea-Bissau
GY	Guyana
HA	Haiti
VT	Holy See
HO	Honduras
HU	Hungary
IC	Iceland
IN	India
ID	Indonesia
IR	Iran
IZ	Iraq
EI	Ireland
IS	Israel
IT	Italy
JM	Jamaica (and Cayman Islands)
JA	Japan, Okinawa and Ryukyu Islands
JO	Jordan
KZ	Kazakhstan
KE	Kenya
KR	Kiribati
KN	Korea, North
KS	Korea, South
KU	Kuwait
KG	Kyrgyzstan
LA	Laos
LG	Latvia

FOREIGN COUNTRY ABBREVIATION CODES (continued)

CODE	COUNTRY
LE	Lebanon
LT	Lesotho
LI	Liberia
LY	Libya
LS	Liechtenstein
LH	Lituania
LU	Luxembourg
MC	Macau
MK	Macedonia
MA	Madagascar
MI	Malawi
MY	Malaysia
MV	Maldives
ML	Mali
MT	Malta
RM	Marshall Islands
MR	Mauritania
MP	Mauritius
MX	Mexico
FM	Micronesia, Federated States of
MD	Moldova
MN	Monaco
MG	Mongolia
MW	Montenegro
MH	Montserrat
MO	Morocco
MZ	Mozambique
WA	Namibia
NR	Nauru
NP	Nepal
NL	Netherlands
NA	Netherlands Antilles
NC	New Caledonia
NZ	New Zealand
NU	Nicaragua
NG	Niger
NI	Nigeria
NO	Norway
MU	Oman
JA	Okinawa (and Ryukyu Islands)
PK	Pakistan
PS	Palau
PM	Panama
PP	Papua New Guinea
PA	Paraguay
PE	Peru
RP	Philippines
PL	Poland
PO	Portugal
QA	Qatar
RO	Romania

FOREIGN COUNTRY ABBREVIATION CODES (continued)

CODE	COUNTRY
RS	Russia
RW	Rwanda
SC	Saint Kitts and Nevis
ST	Saint Lucia
VC	Saint Vincent and the Grenadines
WS	Samoa
SM	San Marino
TP	Sao Tome and Principe
SA	Saudi Arabia
SG	Senegal
SR	Serbia
SE	Seychelles
SL	Sierra Leone
SN	Singapore
LO	Slovakia
SI	Slovenia
BP	Solomon Islands
SO	Somalia
SF	South Africa
SP	Spain
CE	Sri Lanka (Former Ceylon)
SU	Sudan
NS	Suriname
WZ	Swaziland
SW	Sweden
SZ	Switzerland
SY	Syria
TW	Taiwan
TI	Tajikistan
TZ	Tanzania
TH	Thailand
TO	Togo
TN	Tonga
TD	Trinidad and Tobago
TS	Tunisia
TU	Turkey
TX	Turkmenistan
TV	Tuvala
UG	Uganda
UP	Ukraine
TC	United Arab Emirates
UK	United Kingdom
US	United States
UY	Uruguay
UZ	Uzbekistan
NH	Vanuatu
VE	Venezuela
VM	Vietnam
WS	Western Samoa
YE	Yemen
ZA	Zambia
ZI	Zimbabwe (Former Southern Rhodesia)

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COMMENT FORM

The Personnel Service Center needs your input and feedback concerning this Manual. If there are any areas that are not clear, complete or accurate, additional procedures that should be included, or any other recommendations you may have for improvement, PSC would like to know about them. Just copy this form, write your suggestions in the space below, and mail to PSC (P&D). Or simply E-mail your suggestion to PSC-PRC.

COMMENTS / RECOMMENDATIONS

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For details, you can contact me at the following address and phone number:

Date: _____ Phone No: _____ Rank: _____

Print Name (First, Last): _____ Unit: _____

REPRODUCE LOCALLY

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Overview

Introduction

This appendix will guide you through the procedures needed to compute service.

In this appendix

Topic	See Page
Introduction	1
Creditable Service	2
Deductible Time	10
Pay Base Date	19
Active Duty Base Date	22
Date of Rank	25
Expiration of Enlistment	34
Creditable Sea Duty	39
Quick Reference Tables	44

Introduction to Computation Procedures

Introduction

In this section you will learn the procedures to compute the following:

- Creditable Service
- Deductible Time
- Pay Base Date
- Active Duty Base Date
- Date of Rank
- Expiration of Enlistment
- Creditable Sea Duty

Procedure Tables

There are procedure tables on each of the above throughout this section. Use the appropriate table on every computation.

Creditable Service

Introduction

In this section we will deal with the rules and procedures for computing creditable service.

Rules

Before you learn the procedures for computing creditable service, you need to know the following:

- In computing creditable service, consider all months to have 30 days. Like pay, creditable service is on a **30 day month basis** with two exceptions:

  1. Active duty for training and/or other active duty for periods of less than 30 consecutive days is always computed day-for-day, and the 31st day of the month is counted.

  2. In deductible time computations, the 31st day of the month is counted when deductible time commences on the 31st day of the month.

- **Never** change the **beginning dates** when doing computations.

- When your ending date is the **last day** of the month and **other** than the **30th**, (as in the 31st or 28th/29th Feb) **change** it to the **30th** , except for computation of Expiration of Enlistment (see page 26).

- When subtracting one date from another date, always **ADD** 1 day for inclusive dates. This puts the beginning date back into the computation.

- When subtracting time from a date, **DO NOT** add a day.

Inclusive Dates

An **inclusive date** is a date that needs to be accounted for in your computation. Inclusive meaning "to include" is a term used for date that form the boundaries of the days that you need to account for. For example if you departed on leave the 4th of April and returned on the 11th of April, you "**inclusive dates**" of leave would be 5 to 10 April. The 5th to 10th of April make up the boundaries of the days you were on leave. So when you determine the "**beginning date**" and "**ending date**" you are establishing the inclusive dates.

Continued on Next Page

Creditable Service, Continued

Adding An Inclusive Day

Using the example on the previous page, it was determined that the inclusive dates of leave were 5 APR to 10 APR. Now if we were to count those days: 5,6,7,8,9,10, we would come up with 6 days. But computations of service are done by subtracting a date (beginning date) from a date (ending date).

```
90 04 10  last day of leave (Ending date)
90 04 05  first day of leave (Beginning date)
      05
```

As you can see when a date is subtracted from another date, the beginning date is lost, due to the subtraction. This is why an "inclusive day" is added to the total, so the inclusive date that was lost (in this case the 5th of April) can be accounted for.

```
90 04 10  Ending date
90 04 05  Beginning date
      05
+     01  Inclusive day
      06
```

Changing Dates

Before you can change a date always ask yourself these four questions:

- Is the date an ending date?
- Is the computation base on Pay (30-day month basis)?
- Is the ending date the last day of the month?
- Is the ending date other than the 30th?

If yes is the answer to **all** of these questions then you must change the date to the 30th. But, if the answer is **no** to just one of these questions do not change the date. Always remember that the answer must be yes to all four questions before you can change the date.

Continued on Next Page

Creditable Service, Continued

February

When using the month of February:

- (a) In a leap year, if ending date is the 29th, change to the 30th when computing for pay.
- (b) If the ending date is 28 February of a leap year, leave it as 28 February since the 28th isn't the last day of the month in a leap year.
- (c) If the ending date is 28 February in a **Non-Leap** year change to the 30th when computing using the **30-Day Rule**.

COMMENT: Leap years come every 4 years.

Continued on Next Page

Creditable Service, Continued

Procedure Table #1 Creditable Service

Use the following steps in computing Creditable Service.

Step	Procedure
1	List the date of release from the Coast Guard or other Service. (Ending Date) **If date of release is the last day of the month and other than the 30th change to the 30th.**
2	Minus the date entered the Coast Guard or other Service. (Beginning Date) **(Never Change)**
3	Plus one day (01) for inclusive date
4	Plus any prior military service **(If applicable)**
5	Minus deductible time for Pay purposes.

Example #1

Let's take an arbitrary enlistment and discharge date and use the rules mentioned earlier to come up with creditable service. In doing creditable service our final answer must be in **Years, Months**, and **Days** not a date. **Seaman Smith enlisted in the Coast Guard on 27 March 1984 and discharged on 24 March 1988.**

- Step 1 - List the date of release from the Coast Guard.

88 03 24 Discharge Date

(Notice the format, Year, Month, Day)

- Step 2 - Minus the date entered the Coast Guard.

88 03 24 Discharge Date
-88 03 27 Enlistment Date

Continued on Next Page

Creditable Service, Continued

Example #1, Continued

What you will be doing is simple math - borrowing, subtracting or adding. Start the computation by subtracting the day's column.

```
     02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
```

We know that we cannot subtract 27 from 24. We need to borrow one month, which is equal to 30 days from the month's column, and add it to the 24 days to make 54.

Since we borrowed from the month column, we must change the 03 to a 02.

Next we need to work on the months column. Since we cannot subtract 03 from 02, we need to borrow from the year column. Borrow 12 months (01 year) and add it to the 02 months to make it 14 months.

```
     14
  87 02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
```

Because we borrow one year from the year column and converted it for use in the month's column, we must change the 88 to 87.

Continued on Next Page

Creditable Service, Continued

Example #1 Continued

We now have a workable problem. Subtract do the days, months, and years.

```
     14
  87 02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
  03 11 27
```

- Step 3 - So far our answer came out to be 03 years, 11 months and 27 days. **Now remember our rule, anytime you subtract two dates you must add 01 inclusive day.**

```
     14
  87 02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
  03 11 27
+       01  Inclusive day
  03 11 28
```

For total creditable service our member has 03 years, 11 months, 28 days for pay purposes.

Continued on Next Page

Creditable Service, Continued

Example #2

This time we will do one where you have to change the ending date.

YN1 Smith who enlisted in the Coast Guard on 3 August 1984 and discharged on 31 July 1988.

- Step 1 - List the date of Release from the Coast Guard.

  88 07 31 Discharge Date (Ending Date)

- Step 2 - Minus the date entered the Coast Guard

  88 07 31 Discharge Date (Ending Date)
  - 84 08 03 Enlistment Date

Before we can do this problem we need to ask the following questions, based on our rules.

1. Is this computation for pay purposes? **Yes, Creditable Service is a pay computation.**

2. Is the ending date the last day of that month? **Yes, 31 July is the last day of July.**

3. Is ending date other than the 30th? **Yes, the 31st.**
   What does the rule tell you to do? It tells you to change 31st to 30th since **pay** is on a **30-day month basis.**

```
        30
  88 07 31  Discharge Date (Ending Date)
- 84 08 03  Enlistment Date
```

Continued on Next Page

Creditable Service, Continued

Example #2 Continued

Looking at the problem you can see that 07 cannot subtract 08. You have to borrow one year (12 months) and add it to the 07 to make 19. We now have a workable problem, subtract down the days, months, and years.

```
   87 19 30
   88 07 31  Discharge Date (Ending Date)
 -  84 08 03  Enlistment Date

   03 11 27
```

- Step 3 - Since you subtracted two dates you have to add 01 day inclusive.

```
   87 19 30
   88 07 31  Discharge Date (Ending Date)
 -  84 08 03  Enlistment Date

   03 11 27
 +        01  Inclusive day

   03 11 28
```

Our member has a total creditable service of 03 years, 11 months, and 28 days for pay.

Remember

Never forget to ask yourself the four questions before changing a date.

- Is the date an ending date?
- Is the computation base on Pay (30-day month basis)?
- Is the ending date the last day of the month?
- Is the ending date other than the 30th?

Deductible Time

Introduction

You've read that deductible time is a period that does not count as creditable service. This is bad time -- time which needs making up. In this lesson will cover the rules for computing deductible time.

What time is deductible?

The following time is deductible and needs making up.

- Unauthorized Absence in excess of 24 hours
- Sickness due to own misconduct:

  Absence due to abuse of alcohol or drugs.

  Refusal to submit to medical treatment.

  Concealing disease or injury.
- Confinement:

  Civil Arrest

Confinement awaiting trial & disposition of courts-martial case
Confinement under sentence as a result of a courts-martial.

When doe deductible time start and finish?

First Day of Deductible Time

- Day of departure (time leave, liberty, or authorized travel time expires).
- Day of absence due to illness caused by own misconduct.
- Day taken into custody by civil authorities.
- Time liberty or leave expires, if absence due to own misconduct or custody by civil authorities occurs during authorized leave or liberty.

Last Day of Deductible Time

- Last full day of unauthorized absence (day **prior** to return to full duty status).
- **DO NOT** count the day of return as deductible time. **Day of return is a day of duty regardless of time of day.**

Continued on Next Page

Deductible Time, Continued

Procedures for Deductible time

There are different procedures for computing deductible time. The procedure used will be based on whether it is for Pay purposes or Expiration of Enlistment purposes.

(1) Is the period of absence over 24 hours?

If yes continue. If no STOP, the period of absences is not deductible

(2) Is the purpose of computation for Pay or Expiration of Enlistment?

The answer to this will determine which procedure table you will use. If the answer is both, be sure to work you pay and expiration of enlistment procedures separately.

(3) If the purpose is for expiration of enlistment, does unauthorized absence involve a single month or multiple months?

The answer to this will determine which expiration of enlistment procedure table you will use.

Procedure for Pay Purposes

Deductible Time for Pay Purposes

- Compute deductible time for pay purposes when the computation is for:

  Creditable Service

  Pay Base Date

  Active Duty Base Date

  Date of Rank

  Creditable Sea Duty

- Compute all months on a 30-day basis.

Comment

Only deduct actual paydays for deductible time for pay purposes. Since the 31st isn't a day of pay, don't count it as deductible day for pay purposes.

Continued on Next Page

Deductible Time, Continued

Procedure Table #2 Deductible time for Pay

Use the following steps in computing deductible time for Pay (30-day month basis computation).

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the date prior to returning to full duty status. This is the Ending Date. If the ending date is the last day of the month and not the 30th, change it to the 30th.
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Remember

Procedure table #2 is used to compute deductible time for all 30 day based computations (creditable service, pay base date, active duty base date, date of rank and creditable sea duty).

Procedure for Expiration of Enlistment Purposes

Deductible Time for Expiration of Enlistment purposes.

- Compute on a **day for day basis**, as you would on a calendar.
- Deductible time is computed on **actual** full days of absence. Do not change the ending date.

Continued on Next Page

Deductible Time, Continued

Days in the month

It is very important for you to know how many days are in a given month. Listed below are the number of days in each month:

- Jan - 31 days
- Feb - 28 days (29 for leap years)
- Mar - 31 days
- Apr -30 days
- May - 31 days
- Jun - 30 days
- Jul - 31 days
- Aug - 31 days
- Sep 30 days
- Oct - 31 days
- Nov - 30 days
- Dec - 31 days

Procedure Table #3

Use the following steps in computing deductible time for **Expiration of Enlistment** when unauthorized absence happens within a **single month.**

Deductible Time for Expiration of Enlistment (Single Month)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the date prior to returning to full duty status. This is the Ending Date. **(Never Change)**
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Continued on Next Page

Deductible Time, Continued

Procedure Table #4

Use the following steps in computing deductible time for expiration of enlistment when unauthorized absence involves multiple months.

Deductible Time for Expiration of Enlistment (Multiple Months)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the last day of the month in the month the member departed. (**Don't** change to the 30th) **Example -** if departure date is 20 March the last day of the month would be 31 March.
3	Subtract the Beginning Date from the last day of the month member departed. Example - 31 March minus 20 March is 11 days.
4	Add 1 day for inclusive dates. Example - 11 days plus 1 inclusive day is 12 days
5	Add remaining days of deductible time in the next month(s). (If any) Example - if member returned on 4 April the deductible days in April would be 3. 12 days from March plus 3 days from April equals 15 days total deductible time.

Comment

Procedure table #4 is used to compute unauthorized absence, which occurs in two different months for expiration of enlistment purposes. Step 5 (add remaining days of deductible time in the next month) will **not always** be used.

Example - Member departs on unauthorized absence on 14 October and returns 1 November.

The last day of deductible time is the day prior to returning to full duty status (in this case 31 October), there would be no deductible time in the next month (November) since the day of return (1 November) is a day of duty.

Continued on Next Page

Deductible Time, Continued

Example #1

Below are some examples of deductible time involving Pay & Expiration of Enlistment within the same month.

MK3 Michael declared on unauthorized absence (UA) 0730, 15 March 1987 and returned at 1900, 21 March 1987.

Remember the 3 questions you must ask before we can work the computation?

- Question 1 - Is the period of absence over 24 hours? **Yes**
- Question 2 - Is the Purpose of computation for pay or expiration of enlistment? **Both**
- Question 3 - If the purpose is for expiration of enlistment, does unauthorized absence involve a single or multiple months? **Single**

Since the answer to question #2 is both, that means you need to first use procedure table #2 (pay purposes). Look at the example below:

```
  87 03 20  Ending Date
- 87 03 15  Beginning Date
  00 00 05
+       01  Inclusive day
  00 00 06  Total deductible time for pay
```

Now let's do the expiration of enlistment computation. Since the answer to question #3 is single month use procedure table #3

Look at the example below:

```
  87 03 20  Ending Date
- 87 03 15  Beginning Date
  00 00 05
+       01  Inclusive day
  00 00 06  Total deductible time for expiration of enlistment
```

Comment

All **single** month computations will have the same answer, but different procedure tables are used to avoid confusion. Remember **procedure table #2 is used for all pay computations**, single and multiple month unauthorized absence periods. Always use the correct procedure table.

Continued on Next Page

Deductible Time, Continued

Example #2

The total deductible time for pay & expiration of enlistment won't always be the same. Always work your computations for pay first then for expiration of enlistment. Let's look at example of absence occurring over two months.

SN Ross went on UA at 0730, 15 March 1987 and returned 0730, 1 April 1987.

- Question 1 - Is the period of absence over 24 hours? **Yes**
- Question 2 - Is the purpose of computation for pay or expiration of enlistment? **Both**

Question 3 - If the purpose is for expiration of enlistment, does unauthorized absence involve a single month or multiple months? **Multiple**

Using procedure table #2 we will first work the problem out for **pay purposes**.

```
        30
  87 03 31  Ending Date
- 87 03 15  Beginning Date
  00 00 15
+       01  Inclusive Day
  00 00 16  Total deductible time for pay
```

Since the ending date was the last day of the month and other than the 30th, we had to change it to the 30th.

Continued on Next Page

Deductible Time, Continued

Example #2, Continued

Now let's work the problem out for expiration of enlistment purposes using procedure table #4.

```
  87 03 31  Last day of the month member departed
- 87 03 15  Beginning Date
  00 00 16
+       01  Inclusive Day
  00 00 17  Total deductible time for Expiration of Enlistment
```

Notice step #5 wasn't used for this problem. The last day of the month the member departed (31 March) is also the day prior to return from Unauthorized absence. The day of return (1 April) is a day of duty.

Continued on Next Page

Deductible Time, Continued

Example #3

Let's do another multiple month absence computation.

SN Johnson went UA at 1400, 29 July 1988 and returned 0830, 4 August 1988.

Let's do the computation for **pay** first. Remember to use the correct procedure table. Always use procedure table #2 for **all** pay computations regardless of number of months involved.

```
      07 33
   88 08 03 Ending Date
 - 88 07 29  Beginning Date
   00 00 04
 +       01  Inclusive Day
   00 00 05  Total deductible time for pay
```

Now let's do the computation for expiration of enlistment. Remember when doing a computation for expiration of enlistment involving 2 different months you must use procedure table #4.

```
   88 07 31  Last day of month of departure month
 - 88 07 29  Beginning Date
   00 00 02
 +       01  Inclusive Day
   00 00 03  Deductible time for July
 +       03  Deductible time for days in August (1 to 3 August inclusive)
   00 00 06  Total deductible time for Expiration of Enlistment
```

Notice step #5 was used for this problem. Since the day of return from unauthorized absence is 4 August, the last day of deductible time is 3 August, giving us 3 days deductible for the month of August.

Pay Base Date

Introduction

You've read that Pay Base Dates include both active and inactive service. A Pay Base Date is the actual or constructive date of original entry in the service, which is creditable for pay purposes. In this lesson you will learn how to compute or construct a pay base date.

Date Conversion Chart

When you final computation is not a real date, use the 30 Day Rule to convert to a true date (Except in some cases involving February). When computation ends in double zeros, use the Date Conversion chart provided below.

If your computation is:	Your date will be:
88 01 00	87 DEC 31
88 02 00	88 JAN 31
88 02 28	88 FEB 28
88 02 29	88 FEB 29
87 02 29	87 FEB 29*
88 02 30	88 MAR 01
88 02 31	88 MAR 01
88 03 00	88 MAR 01
88 04 00	88 MAR 31
88 05 00	88 APR 30
88 06 00	88 MAY 31
88 07 00	88 JUN 30
88 08 00	88 JUL 31
88 09 00	88 AUG 31
88 10 00	88 SEP 30
88 11 00	88 OCT 31
88 12 00	88 NOV 30
88 00 00	87 NOV 30
88 00 01	87 DEC 01

Comment

If a pay based date computation ends as 29 February, leave as 29 February regardless if the year is a leap year. The year 1988 in the chart above is hypothetical. You can use this chart in any year.

Continued on Next Page

Pay Base Date, Continued

Procedure Table #5 Pay Base Dates

Use the following steps in computing a pay base date:

Step	Procedure
1	List the date of current entry into the Coast Guard
2	Subtract Prior Military Service (active & inactive)
3	Add deductible time for pay (if any)
4	If the result is not a date, convert to a true date using the 30-Day Rule or Date Conversion Chart.

Example #1

MK3 Allen enlisted in the Coast Guard on 15 April 1988. He also has 04 Years 00 months and 00 days of Prior military service. No deductible time.

- Step 1 - List the date of current entry in the Coast Guard

  88 04 15

- Step 2 - Subtract prior military service.

  88 04 15 Enlistment Date
- 04 00 00 Prior military Service
  84 04 15

Comment

Notice in Step 2 we did not add 1 inclusive day, because 04 00 00 is not a true date, it's a period of time.

Continued on Next Page

Pay Base Date, Continued

Example #2

Let's try one with deductible time involved.

YN3 Herbert enlisted on 22 March 1986 and has 08 days deductible time (1 June 86 to 8 June 86 inclusive). No prior service.

- Step 1 - List the date of current entry in the Coast Guard

  86 03 22

- Step 2 - Subtract prior military service.

```
  86 03 22  Enlistment Date
- 00 00 00  Prior Military Service
  86 03 22
```

- Step 3 - Plus deductible time for pay.

```
  86 03 22  Enlistment Date
- 00 00 00  Prior Military Service
  86 03 22
+ 00 00 08  Deductible time
  86 03 30  Convert to:  86 March 30 (pay base date)
```

Comment

Once you arrive at an actual date (one you know is on the calendar do not change it.

Active Duty Base Dates

Introduction

In your reading in Section B, you read that an Active Duty Base Date is the date on which seniority for retirement begins.

Only active time is used.

Procedure Table #6 Active Duty Base Dates

Compute Active Duty Base Date the same way as Pay Base Dates (except only active duty counts), as in computing months on a 30 days basis.

Use the following steps in computing an Active Duty Base Date:

Step	Procedure
1	List date member last entered on active duty.
2	Subtract the amount of previous active duty or active duty for training. **(Weekend drills for reserve do no count.)**
3	Add any deductible time for pay.
4	If the result is not a date, convert to a true date using the 30-Day Rule or Date Conversion Chart on page 19.

Continued on Next Page

Active Duty Base Dates, Continued

Example #1

SK3 Thomas enlisted in the Coast Guard on 19 August 1988. He has prior Active Service in the Marine Corps of 03 years 11 months and 26 days. Not deductible time.

- Step 1 - Determine the date member last entered Active Duty.

  88 08 19

- Step 2 - Subtract the amount of prior Active Duty.

```
    19
  87 07 49
  88 08 19  Enlistment Date
-  03 11 26  Prior Active Duty
  84 08 23
```

- Step 3 - Add any deductible time. **None**

- Step 4 - Convert results into a True Date. **84 August 23**

Comment

Notice an inclusive date was not added, due to 03 11 26 being a period of time and not a true date.

Continued on Next Page

Active Duty Base Dates, Continued

Example #2

Now let's try one using deductible time and prior active service.

ET2 Kerns enlisted in the Coast Guard on 24 August 1987 with 04 years 00 months and 00 days of prior active service. Since enlisting in the Coast Guard he has 8 days of deductible time.

- Step 1 - Date member last entered active duty

  87 08 24

- Step 2 - Subtract the amount of prior Active Duty.

```
  87 08 24  Enlistment Date
- 04 00 00  Prior Active Duty
  83 08 24
```

- Step 3 - Add any deductible time.

```
  87 08 24  Enlistment Date
- 04 00 00  Prior Active Duty
  83 08 24
+ 00 00 08  Deductible time
  83 08 32
```

- Step 4 - Convert to a True Date.

```
  83 08 32
-       30  days
  83 09 02
```

  83 September 02

Comment

Remember the 30-day rule, we have to subtract 30 days from 32 because 30 days is a month. Carry 30 days over to the month's column.

Date of Rank

Introduction

Date of Rank is the actual or constructive date of advancement. The date of rank is for advancement purposes within the present rating and is based on a 30-day month.

Date of Rank

Use the following steps in computing a new Date of Rank for members on active duty:

Step	Procedure
1	List the date of latest advancement or most current date of rank or list the date of latest enlistment.
2	The following rules apply: • Subtract periods of creditable Coast Guard (USCG) or Coast guard Reserve (USCGR) active duty. • Only time previously served in the present or higher pay grade in the USCG or USCGR, under continuous active service conditions within three months of separation is creditable. • Members with broken service (out of service over three months) will have their Date of Rank based on the effective date of their reenlistment. • When calculating prior active service, each month will be considered to have 30 days, unless the active duty was for a period of less than 30 consecutive days. • Members who return to active duty from the CNC program will receive full credit for any TIR formerly creditable prior to their separation under the CNC program. However, to be eligible to participate in SWE competition, they must serve half the minimum TIR required for advancement after returning to active duty.
3	Add deductible time for Pay.
4	If the result is not a true date, convert to a true date using the 30-Day Rule or Date Chart.

Date of Rank, Continued

Example #1 Initial Enlistment

Member enlisted in the USCG on 19 August 1996 as a SR. The member has no prior Coast Guard or Coast Guard reserve service.

- Step 1 - Member enlists in the USCG as E1.

  96 08 19

- Step 2 - Subtract prior USCG/USCGR active service

```
    96 08 19  Date member enlisted in USCG as E1
+   00 00 00  prior USCG/USCGR active service

    96 08 19

    96 08 19  New Date of Rank
```

Example #2 Entered USCG, RELAD, reenlisted USCG in same rate/grade

Member reenlisted in the USCG on 19 August 1996 as a BM3. The member had prior active USCG service from 2 July 1992 to 1 July 1996. During this service the member's pay grade history was as follows:

92 07 02 E1
92 09 10 E2
93 06 01 E3
94 07 01 E4 (BM3)

- Step 1 - Member enlists in the USCG as E4 (BM3)

  96 08 19

Continued on Next Page

Date of Rank, Continued

Example #2 Entered USCG, RELAD, reenlisted USCG in same rate/grade, continued

- Step 2 - Member's prior active service in pay grade E4 or above.

```
   96 07 01  Date of initial expiration of enlistment
-  94 07 01  Date member initially advanced to E4 (BM3)
   02 00 00
        +1
   02 00 01
```

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

```
   96 08 19  Date member enlisted in the USCG as E4 (BM3)
-  02 00 01  Prior USCG/USCGR active service in pay grade E4
             (BM3) or above

   94 08 18

   94 08 18  New Date of Rank
```

Example #3 Entered USCG, RELAD, reenlisted USCG in lower rate/grade

Member reenlisted in the USCG on 19 August 1996 as a BM3. The member had prior active USCG service from 2 July 1992 to 1 July 1996. During this service the member's pay grade history was as follow:

92 07 02 E1
92 09 10 E2
93 06 01 E3
94 07 01 E4 (BM3)
96 01 01 E5 (BM2)

- Step 1 - Member enlists in the USCG as E4 (BM3)

96 08 19

Continued on Next Page

Date of Rank, Continued

Example #3 Entered USCG, RELAD, reenlisted USCG in lower rate/grade, continued

- Step 2 - Member's prior active service in pay grade E4 or above.

```
   96 07 01  Date of initial expiration of enlistment
-  94 07 01  Date member initially advanced to E4 (BM3)
   02 00 00
       +1
   02 00 01
```

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

```
   96 08 19  Date member enlisted in the USCG as E4 (BM3)
-  02 00 01  Prior USCG/USCGR active service in pay grade E4 (BM3) or
             above

   94 08 18

   94 08 18  New Date of Rank
```

Example #4 Discharged from USCGR, entered USCG in same pay grade

Member was discharged from the USCGR on 27 January 1997 as an E3 and enlisted in the USCG on 28 January 1997 as an E3. The member had prior USCGR service from 6 June 1995 to 27 January 1997. Member has the following pay grade history in the USCGR.

95 06 06 E1
95 07 28 E2
96 11 16 E3

- Step 1 - Member enlists in the USCG as an E3.

97 01 28

Continued on Next Page

Date of Rank, Continued

Example #4 Discharged from USCGR and entered USCG in same pay grade, continued

- Step 2 - Subtract prior USCG/USCGR active service in pay grade E3 or above since 96 11 16 (date first made E3)

	97 01 28	Date member enlisted in the USCG as an E3
-	00 00 00	Prior USCG/USCGR active service in pay grade E3 or above since 96 11 16 (date first made E3). **Member was not on AD during this time frame.**
	97 01 28	
	97 01 28	New Date of Rank

Example #5 Discharged from USCGR and entered USCG in lower pay grade

Member enlisted in the USCG on 3 November 1996 as an SA. The member had prior USCGR service from 5 July 1995 to 2 November 1996 and was on active duty for the following periods:

95SEP07 - 95DEC23
96JUL29 - 96AUG11

Member has the following pay grade history in the USCGR:

95 06 05 E1
95 12 23 E2
96 07 01 E3

Step 1 - Member enlists in the USCG as an E2.

96 11 03

Step 2- Member's prior active service in pay grade E2 or above.
(1) 1 day of ADT on 95 12 23
(2) 14 days of ADT 96 07 29 through 96 08 11 (day for day, since less than 30 days active)

15 days total

Continued on Next Page

Date of Rank, Continued

Example #5 Discharged from USCGR and entered USCG in lower pay grade, continued

- Step 3- Subtract prior USCG/USCGR active service in pay grade E2 or above.

```
  96 11 03  Date member enlisted in the USCG as an E2
- 00 00 15  Prior USCG/USCGR active service in pay grade E2 or above
            (1) 1 day of ADT on 95 12 23
            (2) 14 days of ADT 96 07 29 through 96 08 11

             15 days total

  96 10 18

  96 10 18  New Date of Rank
```

Example #6 Member of USCG advanced, was reduced, discharged, reenlisted USCG (continuous service)

Member enlisted in the USCG on 3 January 1997 as a BM3. The member had prior USCG service from 14 November 1993 to 31 October 1996. Member's pay grade history was as follows:

93 11 14 E1
94 01 30 E2
94 03 01 E3
95 01 01 E4 (BM3)
95 02 01 E3
95 08 01 E4 (BM3)

- Step 1 - member enlists in the USCG as an E4 (BM3).

  97 01 03

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

```
  96 10 30  Date of initial expiration of enlistment (for computation purposes 30
            October 1996 will be used vice 31 October 1996)
- 95 08 01  Date member re-attained the rank of E4 (BM3)
  01 02 29
        +1
  01 02 30  therefore 01 03 00
```

Continued on Next Page

Date of Rank, Continued

Example #6 Member of USCG advanced, was reduced, discharged, reenlisted USCG (continuous service), continued

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 or above (during period 1 August 1995 to 31 October 1996).

```
    97 01 03  Date member enlisted in the USCG as E4 (BM3)
-   01 03 00  Prior USCG/USCGR active service in pay grade E4 (BM3) or
              above (during period 1 August 1995 to 31 October 1996)

    95 10 03

    95 10 03  New Date of Rank
```

Example #7 Member of USCG separated for CNC program, reenlisted in same pay grade

Member reenlisted in the USCG on 8 August 1996 as a YN3. The member had prior USCG service from 9 May 1988 to 3 July 1995.

Member has the following pay grade history in the USCG:

```
88 05 09  E1
88 07 15  E2
89 01 17  E3
91 06 01  E4 (RM3)
92 09 25  E4 (YN3)
```

- Step 1 - Member enlists in the USCG as an E4 (YN3).

```
96 08 08
```

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

```
  95 07 03  Date of initial expiration of enlistment
- 92 09 25  Date member re-attained the rank of E4 (YN3)
  02 09 08
        +1
  02 09 09
```

Continued on Next Page

Date of Rank, Continued

Example #7 Member of USCG separated for CNC program, reenlisted in same pay grade, continued

- Step3 - Subtract prior USCG/USCGR active service in pay grade E4 or above (same rating during period 25 September 1992 to 3 July 1995)

```
  96 08 08  Date member enlisted in the USCG as E4 (YN3)
- 02 09 09  Prior USCG/USCGR active service in pay grade E4 or
            above (same rating during period 25 September 1992 to
            3 July 1995)

  93 10 29

  93 10 29  New Date of Rank
```

Example #8 Member resumed enlisted status upon termination of appointment as a temporary officer

Member resumed enlisted status in the USCG on 1 June 1996 as a BM1.

Member has the following pay grade history in the USCG:

82 06 14 E1
82 08 20 E2
83 11 16 E3
84 06 09 E4 (BM3)
85 10 01 E5 (BM2)
92 07 01 E6 (BM1)
93 10 19 E6 (OCUI1)
94 03 04 O1E
95 09 04 O2E

- Step 1 - Member resumes enlisted status in the USCG as an E6 (BM1).

  96 06 01

- Step2 - Prior USCG/USCGR active service in pay grade E6 or above

```
  94 03 03  Date of initially appointed as temporary officer
- 92 07 01  Date of member's initial attainment of E6
  01 08 02
        +1
  01 08 03
```

Continued on Next Page

Date of Rank, Continued

Example #8 Member resumed enlisted status upon termination of appointment as a temporary officer, continued

- Step3 - Subtract prior USCG/USCGR active service in pay grade E6

96 06 01	Date member resumed enlisted status in the USCG as E6
- 01 08 03	Prior USCG/USCGR active service in pay grade E6 or above (during period 1 July 1992 to 3 March 1994)
94 09 28	
94 09 28	New Date of Rank

Expiration of Enlistment

Introduction

Expiration of enlistment computations are figured on a **day for day** basis. Only active military service is creditable. This section provides examples of how to compute expiration of enlistment given the term of enlistment, extensions, and any deductible time.

Procedure Table #8 Expiration of Enlistment

Use the following steps in computing Expiration of Enlistment.

Step	Procedure
1	Determine the date of entry into the Coast Guard.
2	Plus term of enlistment
3	Minus 01 day
4	Plus, if applicable, deductible time for expiration of enlistment. (day for day basis)
5	If the result is not a true date, convert to true date using the day for day rule.
6	Plus, if applicable, term of extension
7	Minus 01 day
8	If the result is not a true date, convert to true date using the day for day rule.
9	Repeat steps 4,5,6,7 and 8, computing any reextensions and/or periods of deductible time

Days in the month

When you need to convert to a true date it is very important for you to know how many days are in a given month. Listed below are the number of days in each month.

• Jan - 31 days	• Jul - 31 days
• Feb - 28 days (29 for leap years)	• Aug - 31 days
• Mar - 31 days	• Sep - 30 days
• Apr - 30 days	• Oct - 31 days
• May - 31 days	• Nov - 30 days
• Jun - 30 days	• Dec - 31 days

Continued on Next Page

Expiration of Enlistment, Continued

Example Deductible Time

YN2 Crane enlisted in the Coast Guard on 25 May 1984 for 04 years. He also has 17 days for deductible time for expiration of enlistment purposes.

- Step 1 - Determine date of entry into the Coast Guard.

84 05 25 Date of entry (Enlistment)

- Step 2 - Plus term of enlistment.

```
   84 05 25  Date of entry (Enlistment)
+  04 00 00  Term of Enlistment
   88 05 25
```

Step 3 - Minus 01 day

```
   88 05 25
-        01  Day
   88 05 24  Normal Expiration of Enlistment
```

- Step 4 - Plus deductible time for expiration of enlistment

```
   88 05 24
+        17  Days of deductible time
   88 05 41
```

- Step 5 - Convert to a true date using the day for day rule

```
   88 05 41      Subtract the number of days that belong to the
-        31      month in the month's column (in this case May).
   88 06 10      Add the remaining days to the next month(s).
   88 June 10    New Expiration of Enlistment
```

Note

Remember expiration of enlistment is done on a **day for day** basis. So when you need to round up the days to months to make a real date, subtract the number of days that belong to that particular month. For example: if your computation came out as 92 07 43 you would subtract 31 days from the days column (July has 31 days) and add the remainder to the next month. So 92 07 43 would convert to 92 08 12.

Continued on Next Page

Expiration of Enlistment, Continued

Extensions

When computing an expiration of enlistment based on an extension or reextension, always use the date the extension begins, add the period of the extension, and then subtract 1 day to arrive at the new expiration date.

- For extensions, the start date is the date following the normal date of expiration of enlistment.
- For reextensions, the start date is the date following the expiration of enlistment as previously extended.

Example Extensions

PS2 Caldwell enlisted in the Coast Guard Reserve on 29 February 1988 for 08 years. He extended on 29 February 1996 for 4 years.

- Step 1 - Determine date of entry into Coast Guard

  88 02 29

- Step 2 - Plus term of enlistment

```
    88 02 29  Date of entry (Enlistment)
+   08 00 00  Term of enlistment
    96 02 29
```

Step 3 - Minus 01 day

```
    96 02 29
-         01  Day
    96 02 28  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
    96 02 29      First extension start date (day after original or adjusted
+   04 00 00      expiration of enlistment) Plus term of extension.
    00 02 29
-         01      Minus 01 day
    00 02 28
    2000  FEB 28  New expiration of enlistment
```

Continued on Next Page

Expiration of Enlistment, Continued

Example Extension continued

HS2 Hernandez enlisted in the Coast Guard on 31 October 1989 for 04 years. She extended on 31 October 1993 for 2 Years, reextended on 31 October 1995 for 8 months, and is reextending on 1 July 1996 for 4 months.

- Step 1 - Determine date of entry into coast Guard.

```
  89 10 31  Date of entry (Enlistment)
```

- Step 2 - Plus term of enlistment.

```
  89 10 31  Date of entry (Enlistment)
+ 04 00 00  Term of enlistment
  93 10 31
```

- Step 3 - Minus 01 day

```
  93 10 31
-       01  Day
  93 10 30  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
                First extension start date (day after original or adjusted expiration
  93 10 31      of enlistment)
+ 02 00 00      Plus term of enlistment
  95 10 31
-       01      Minus 01 day
  95 10 30      New expiration  of enlistment
```

- Step 5 - Add term of first reextension and subtract 1 day.

```
  95 10 31      First reextension start date
+ 00 08 00      Plus term of reextension
  96 06 31
-       01      Minus 01 day
  96 06 30      New expiration of enlistment
```

- Step 6 - Add term of second reextension and subtract 1 day.

```
  96 07 01      First reextension start date
+ 00 04 00      Plus term of reextension
  96 11 01
-       01      Minus 01 day
  96 11 00      Convert to a real date
  96 10 31
  96 Oct 31     Final expiration of enlistment date
```

Continued on Next Page

Expiration of Enlistment, Continued

Example Extensions continued

MK2 Williamson enlisted in the Coast Guard on 29 March 1988 for 04 years. He extended on 29 March 1992 for 2 years and 2 months, reextended on 29 May 1994 for 09 months, and is reextending on 1 March 1995 for 2 months.

- Step 1 - Determine date of entry into Coast Guard

  88 03 29

- Step 2 - Plus term of enlistment

88 03 29	Date of entry (Enlistment)
+ 04 00 00	Term of enlistment
92 03 29	

- Step 3 - Minus 01 day

92 03 29	
- 01	Day
92 03 28	Normal expiration of enlistment

- Step 4 - Add term of first extension and subtract 1 day

92 03 29	First extension start date (day after original or adjusted expiration of enlistment)
+ 02 02 00	Plus term of extension
94 05 29	
- 01	Minus 01 day
94 05 28	

- Step 5 - Add term of first reextension and subtract 1 day

94 05 29	First reextension start date
+ 00 09 00	Plus term of reextension
94 14 29	
- 01	Minus 01 day
94 14 28	Convert to a true date to arrive at the new
95 02 28	Expiration of enlistment

- Step 6 - Add term of second reextension and subtract 1 day

95 03 01	First reextension start date
+ 00 02 00	Plus term of reextension
95 05 01	
- 01	Minus 01 day
95 05 00	Convert to a true date
95 04 30	
95 Apr 30	Final expiration of enlistment date

Creditable Sea Duty

Introduction

Computation of creditable sea duty is similar to computation of creditable service:

- Consider all months on a 30-day basis. The 31st day of the month does not count **unless** the member serves less than 30 consecutive days.
- Calculate deductible time on a 30-day basis same as deductible time for pay purposes.
- Count TAD on a day for day basis.

  Note: To compute TAD use procedure table #10 located in section E (quick reference tables).

- Creditable sea duty terminates on the 30th calendar day at 2400 after departure on TAD.
- Leave taken in conjunction with TAD is counted as creditable sea service provided the member was entitled to sea pay/time at the start date of the leave.

  Note: Members whose career sea pay stops during periods of TAD or while ashore at a mobile unit are not entitled to career sea pay for periods of leave taken <u>after</u> the career sea pay has stopped. In this case career sea pay will not restart until member reports back to a career sea pay eligible vessel.

- TAD to a qualifying sea pay vessel from a shore unit is creditable sea duty regardless of length of time aboard vessel.
- Time spent enroute from one vessel to another is not creditable.

Continued on Next Page

Creditable Sea Duty, Continued

Procedure Table #9 Creditable Sea Duty

Use the following steps to compute Creditable Sea Duty.

Step	Procedure
1	List the date that the member departed the vessel. This is the ending date. **If the ending date is the last day of the month and not the 30th, change it to the 30th.**
2	Minus the date the member reported to the vessel. This is the beginning date. **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Minus deductible time for pay purposes.
5	Minus any period of TAD after 30 **calendar** days.
6	Plus prior sea time.
7	Convert the results into full years, months and days.

Continued on Next Page

Creditable Sea Duty, Continued

Example #1

Member stationed on CGC STEADFAST from 15 March 1989 to 31 March 1990. Member had not deductible time. While on board member departed TAD to RESTRACEN Yorktown on 2 May 1989 and returned on 5 June 1989.

- Step 1 - List the date member departed the vessel.

  90 03 31 Ending Date

- Step 2 - Minus the date member reported to the vessel.

30	
90 03 31	Ending Date
89 03 15	Beginning Date
01 00 15	

- Step 3 - Plus 01 day for inclusive date.

90 03 30	Ending Date
89 03 15	Beginning Date
01 00 15	
+ 01	Inclusive Date
01 00 16	Creditable Sea Duty

- Step 4 - Minus deductible time. None in this example.

- Step 5 - Minus any period of TAD after 30 days.

89 05 31	Last day of month of departure
89 05 03	Day after departure
00 00 28	
+ 01	Inclusive Date
00 00 29	days TAD in MAY
00 00 04	days TAD in JUN
00 00 33	Total days TAD
- 30	Maximum allowed days TAD creditable for Sea duty
= 03	days lost for TAD
01 00 16	Creditable Sea Duty
- 00 00 03	Lost from TAD
01 00 13	Total Creditable Sea Duty

Continued on Next Page

Creditable Sea Duty, Continued

Example #1 continued

- Step 6 - Plus prior sea time: None, in this example.
- Step 7 - Convert to full years, months, and days

01 Year 00 Months 13 Days

Example #2

In this example we will compute a TAD period when leave is involved

While on board the CGC DALLAS member departed TAD to Support Center New York on 13 March 1990 and returned on 29 April 1990. Member used 5 days leave en route to TAD unit.

- Step 1 - List date following departure on TAD

  90 03 14 Day following date of departure

- Step 2 – Add the number of days Leave used en route to the TAD unit. The result will be the adjusted TAD start date.

```
  90 03 14  Date of departure
+ 00 00 05  Days of leave
  90 03 19
```

- Step 3 - Determine the last day of the month in the month member departed. (Beginning date month)

  90 03 31 Last day of month

- Step 4 - Subtract the beginning date from the last day of month

```
  90 03 31  Last day of month
- 90 03 19  Beginning Date
  00 00 12
```

- Step 5 - Plus 01 day for inclusive date

```
  00 00 12
+       01  Inclusive Date
  00 00 13  Days TAD in March
```

Continued on Next Page

Creditable Sea Duty, Continued

Example #2 continued

- Step 6 - Add remaining days of TAD in the next month(s) up through prior date of return from TAD.

13	Days TAD in March
+ 28	Days TAD in April
41	Total days TAD

- Step 7 - Subtract days leave used en route from TAD unit to permanent unit (if applicable)

  None in this example

- Step 8 - If total is 31 or more subtract any period of TAD over 30.

41	Total days TAD
- 30	Maximum allowed days TAD creditable for sea duty
11	Total days to deduct from sea duty.

Quick Reference Tables

Procedure Table #1

Creditable Service

Step	Procedure
1	List the date of release from the Coast Guard or other Service. (Ending Date) **If date of release is the last day of the month and other than the 30th change to the 30th.**
2	Minus the date entered the Coast Guard or other Service. (Beginning Date) **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Plus any prior military service. (if applicable)
5	Minus deductible time for Pay purposes.

Procedure Table #2

Use the following steps in computing deductible time for Pay (30-day month basis computation).

Deductible time for Pay

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. (Never Change)
2	Determine the date prior to returning to full duty status. This is the Ending Date. If the ending date is the last day of the month and not the 30th, change it to the 30th.
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Comment

Procedure table #2 is used to compute deductible time for all 30-day month based computations (creditable service, pay base date, active duty base date, date of rank and creditable sea duty).

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #3

Use the following steps in computing deductible time for Expiration of Enlistment when unauthorized absence happens within a single month.

Deductible time for Expiration of Enlistment (Single Month)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the date prior to returning to full duty status. This is the Ending Date. **(Never change)**
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Procedure Table #4

Use the following steps in computing deductible time for Expiration of Enlistment when unauthorized absence happens within multiple months.

Deductible time for Expiration of Enlistment (Multiple Months)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. (Never Change)
2	Determine the last day of the month in the month the member departed. (**Don't** change to the 30th) **Example** - if departure date is 20 March the last day of the month would be 31 March.
3	Subtract the Beginning Date from the last day of the month member departed. **Example** - 31 March minus 20 March is 11 days.
4	Add 1 day for inclusive dates (omit if counting actual days on a calendar) Example - 11 days plus 1 inclusive day is 12 days
5	Add remaining days of deductible time in the next month(s). (If any) Example - if member returned on 4 April the deductible days in April would be 3. 12 days from March plus 3 days from April equals 15 days total deductible time.

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #5

Use the following steps in computing a pay base date.

Pay Base Date

Step	Procedure
1	List the date of current entry into the Coast Guard.
2	Subtract Prior Military Service (active & inactive)
3	Add deductible time for **pay** (if any)
4	If the result is not a date, convert to a true date using **the 30 Day Rule or Date Conversion Chart**

Procedure Table #6

Compute Active Duty Base Dates the same way as Pay Base Dates (except only active duty counts), as in computing months on a 30 day basis.

Active Duty Base Date

Step	Procedure
1	List date member last entered on active duty.
2	Subtract the amount of previous active duty or active duty for training. (Weekend drills for reserves do not count.)
3	Add deductible time for **pay** (if any)
4	If the result is not a date, convert to a true date using **the 30-Day Rule or Date Conversion Chart**

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #7

Use the following steps in computing a new Date of Rank:

Date of Rank

Step	Procedure
1	List the date of latest advancement or most current date of rank.
2	Add deductible time for **pay.**
3	If the result is not a true date, convert to a true date using the 30-Day Rule or Date Conversion Chart.

Procedure Table #8

Use the following steps in computing an Expiration of Enlistment:

Expiration of Enlistment

Step	Procedure
1	Determine the date of entry into the Coast Guard
2	Plus term of enlistment
3	**Minus 01 day**
4	Plus, if applicable, deductible time for expiration of enlistment. (day for day basis)
5	If the result is not a true date, convert to true date using the **day for day** rule
6	Plus, if applicable, term of extension
7	**Minus 01 day**
8	If the result is not a true date, convert to true date using the **day for day** rule
	Repeat steps 4,5,6,7, and 8, computing any reextensions and/or periods of deductible time

Comment

Remember that deductible time for Expiration of Enlistment is on an actual calendar basis.

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #9

Use the following steps to compute creditable sea duty.

Creditable Sea Duty

Step	Procedure
1	List the date that the member departed the vessel. This is the ending date. (Remember if the ending date is the last day of the month and not the 30th, change it to the 30th.)
2	Minus the date the member reported to the vessel. This is the beginning date. **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Minus deductible time for **pay** purposes.
5	Minus any period of TAD after 30 calendar days.
6	Plus prior sea time.
7	Convert the results into full years, months, and days.

Remember

Creditable sea duty is computed on a 30-day month just like creditable service.

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #10

Use the following steps in computing Temporary Additional Duty for use in computing creditable sea duty. TAD is computed on a **day for day** basis.

Temporary Additional Duty

Step	Procedure
1	List the date following departure on TAD. **Example -** if date of departure TAD is 20 July, the date following departure is 97 07 21.
2	Add the number of days Leave used en route to the TAD unit (if any). The result will be the adjusted TAD start date. **Example -** 97 07 21 (date following departure day) + 4 (days leave taken enroute) 97 07 25 (adjusted TAD start date)
3	Determine the last day of the month, which the member departed. Don't change to the 30th. **Example -** if TAD beginning date were 25 July the last day of the month would be 31 July. (31 days in July)
4	Subtract the TAD beginning date from the last day of the month member departed. **Example -** 97 07 31 (last day of month) - 97 07 25 (TAD start date) 6 (number of days TAD in July)
5	Add 1 day for inclusive date. **Example -** 31 July minus 25 July = 6 + 1 = 7 days TAD in July
6	Add remaining days of TAD in the next month(s) up through the day prior to the return date. Member returns from TAD 30 August. **Example -** Since day prior to return date is 29 August, add 29 days to the 7 days from July for a total of 36 days.
7	In this example the total is over 30 days therefore the members sea pay/time will stop at 2400 on 97 08 23 and be restarted at 0001 on 97 08 30. (6 days subtracted from members creditable sea service)

Comments

Members are entitled to creditable sea service for periods of leave in conjunction with TAD if the member is drawing career sea pay/time upon commencement of that particular leave. Sea pay/time stops at 2400, the 30th day of TAD. If the member takes leave after sea pay/time has been stopped, there will be no credible sea service for that leave period. Once sea pay/time has stopped it will only resume upon reporting back to the vessel.

Continued on Next Page

Creditable Sea Duty, Continued

Date Conversion Chart

When your final computation is not a real date, use the 30 Day Rule to convert to a true date (Except in some cases involving February). When a computation ends in double zeros, use the Date Conversion Chart.

If Your Computation is:	Your Date Will Be
96 01 00	95DEC31
960200	96JAN31
960228	96FEB28
950229	95FEB29*
960230	96MAR01
960231	96MAR01
960300	96MAR01
960400	96MAR31
960500	96APR30
960600	96MAY31
960700	96JUN30
960800	96JUL31
960900	96AUG31
961000	96SEP30
961100	96OCT31
961200	96NOV30
960000	95NOV30
960001	95DEC01

Comment

(*) If a pay base date computation ends as 29 February, leave as 29 February regardless if the year is a leap year. The year 1996 in the chart above is hypothetical. You can use this chart in any year.

Continued on Next Page

Quick Reference Tables, Continued

The following chart can be used to count actual days in each month.

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
1	1	1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5	5	5	5	5
6	6	6	6	6	6	6	6	6	6	6	6
7	7	7	7	7	7	7	7	7	7	7	7
8	8	8	8	8	8	8	8	8	8	8	8
9	9	9	9	9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11	11	11	11	11
12	12	12	12	12	12	12	12	12	12	12	12
13	13	13	13	13	13	13	13	13	13	13	13
14	14	14	14	14	14	14	14	14	14	14	14
15	15	15	15	15	15	15	15	15	15	15	15
16	16	16	16	16	16	16	16	16	16	16	16
17	17	17	17	17	17	17	17	17	17	17	17
18	18	18	18	18	18	18	18	18	18	18	18
19	19	19	19	19	19	19	19	19	19	19	19
20	20	20	20	20	20	20	20	20	20	20	20
21	21	21	21	21	21	21	21	21	21	21	21
22	22	22	22	22	22	22	22	22	22	22	22
23	23	23	23	23	23	23	23	23	23	23	23
24	24	24	24	24	24	24	24	24	24	24	24
25	25	25	25	25	25	25	25	25	25	25	25
26	26	26	26	26	26	26	26	26	26	26	26
27	27	27	27	27	27	27	27	27	27	27	27
28	28	28	28	28	28	28	28	28	28	28	28
29		29	29	29	29	29	29	29	29	29	29
30		30	30	30	30	30	30	30	30	30	30
31		31		31		31	31		31		31

NOTE: You need to add the 29th to February when a leap year occurs.

Overview

Introduction

The objective of this appendix is to establish requirements for reviewing leave and earnings statements and to assist in the verification process.

In this appendix

Description	See Page
You and Your LES	F-1
LES Review and Validation	F-10
Leave Errors on the LES	F-12
Explanation of Complex Areas on the LES	F-13

YOU AND YOUR LES

(Leave and Earnings Statement)

Introduction

The LES contains a monthly accounting of your leave and earnings. This information originates from paperwork submitted by your unit's yeoman at your unit's personnel reporting unit (SPO), and updates the pay and personnel computer system (PMIS/JUMPS). The following is an item-by-item explanation of the more common entitlements, allotments, deductions, etc., which may appear on your LES. If you do not receive a LES on or before the end of the month payday, or if there is an error on your LES, report it to your unit's administration/personnel office immediately. It is also a good idea to let your supervisor know when you have a pay or leave accounting problem.

REMEMBER, YOU ARE RESPONSIBLE FOR ADVISING APPROPRIATE OFFICIALS OF ANY SUSPECTED ERRORS ON YOUR LES. Interest will be assessed on debts to the Government other than routine adjustments unless paid within 30 days or waived by CO, PSC. Failure to report known overpayments could result in administrative and/or disciplinary action being initiated against you.

Block-by-Block Description

Here is a brief description of each block on the LES. Use a copy of one of your recent LESs as an example.

Block	Title	Description
1	PERIOD COVERED	Normally a period of one month.
2	SSN	Your social security number. **Make sure this is correct.**
3	PAY BASE DATE	This is your pay base date, which is your actual or constructive date (adjusted for non-continuous service) of original entry into service on active or inactive duty. This date is extremely important. It is used to determine longevity increases in basic pay.
4	AD BASE DATE	This is your active duty base date, which is your actual or constructive date (adjusted for non-continuous service) of entry onto active duty.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
5	EXP AD TERM DATE	This is your expected active duty termination date. For regular enlisted members, reserve members on active duty, and recalled retirees, this is the date you are expected to fulfill you active duty obligation. For regular officer and reserve officers on extended active duty, this is mandatory retirement date, or date of completion of contracted or obligated service. For reserve officers and enlisted members not on extended active duty, this is the date you were expected to be released from your last active duty period.
6	EXP LOSS DATE	For regular enlisted members, this will be the date you will have no further active duty or reserve military obligation. For regular officers and recalled retirees, this will be equal to block 5. For reserve enlisted members, this is your expiration of enlistment. For reserve officers, this should be your 30-year commissioned-service date.
7	MID-MO	The amount paid on mid-month payday for this period.
8	END-MO	The amount paid on end-month payday for this period.
9	ACCT NR	Your savings or checking account number at the financial institution where your net pay is being deposited.
10	ROUTE NR	Your financial institution's routing number for receiving direct deposit payments.
11	BAL BF	The number of leave days to your credit at the beginning of the PERIOD COVERED. The amount of leave days will be identical to the amount in block 15 of your last month's LES, unless leave days are lost on 1 October (due to excess of 60 days leave).
12	EARN	The amount of leave days you earned during the PERIOD COVERED (normally 2 ½ days per period).
13	USED	The number of leave days processed between last month's document processing cutoff date and this month's cutoff date. The actual days recorded are shown in the "Remarks" section.
14	SOLD-PD	The amount of leave sold during the PERIOD COVERED.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
15	BAL EOM	Your leave balance at the end of the PERIOD COVERED. This amount will be identical to block 11 on your next month's LES, unless leave days are lost on 1 October (due to excess of 60 days leave).
16	LOS PR FY	The amount of leave in excess of 60 days that was lost at the end of the prior fiscal year (1 October).
17	SOLDCTD	The total number of days sold during your military career (after 9 February 1976).
18	USCGR TRA/PAY CAT	A three-character code indicating the reserve member's classification, class and training/pay category.
19	NAME	**MAKE SURE THIS IS CORRECT.**
20	RANK/ RATE/ GRADE	Your pay grade (e.g., W-2, E-5, O-3, etc.) **MAKE SURE THIS IS CORRECT**.
21	COST CODE	This number identifies the unit to which the member is assigned and is used for accounting purposes. Normally only HQ units and district offices have cost codes that differ from unit OPFAC's.
	SPO	Identifies the SPO that maintains the member's records.
	UNIT OPFAC	Identifies the permanent unit to which the member is assigned.
22	MAILING ADDRESS	This is your mailing address. **MAKE SURE THIS IS CORRECT.** **NOTE: This is where your IRS Form W-2 will be sent.**
23	DATE/ AMOUNT	The date and estimated amount of your next month's mid-month payment based on PMIS documents processed to date.
24	DATE/ AMOUNT	The date and estimated amount of your next month's end-month payment based on PMIS documents processed to date.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
25	ENTITLE-MEMTS	Entitlements are amounts earned during the PERIOD COVERED. Some of the most common types of entitlements are: • BASIC PAY; Amount per LES period (usually 1 month) based on your grade and years of service. This income is taxable. • BAH WITH DEP; Basic Allowance for Housing, members with dependents: Paid to members who are on active duty for more than 139 days, and the dependents are not assigned/occupying Government-owned or Government-leased quarters. • BAH II WITH DEP; Basic Allowance for Housing Type II, member with dependents. This entitlement appears in two instances: (1) a member with dependents is on active duty for more than 139 days, and the dependents are assigned to Government-owned or Government-leased quarters (a deduction in the same amount will be shown in block 27, itemized as ADEQUATE QTRS); (2) a reservist, with dependents, is on active duty for less than 140 days. • BAH WITHOUT DEP; Basic Allowance for Housing, members without dependents: Paid to members without dependents when the member is not assigned/occupying Government-owned or Government-leased quarters. Also paid to members married to another service member when the member does not qualify for BAH WITH DEP. • BAH II WITHOUT DEP; Basic Allowance for Housing Type II, member without dependents. This entitlement appears in two instances: (1) a member without dependents is on active duty for more than 139 days and the member is assigned to Government-leased quarters (a deduction in the same amount will be shown in block 27, itemized as ADEQUATE QTRS); (2) a reservist without dependents is on active duty for less than 140 days. • BAH DIFF; Basic Allowance for Housing Difference. This entitlement is paid to members authorized a basic allowance for housing solely by reason the member's payment of child support. It is an amount equal to the difference between BAH II WITH DEP and BAH II WITHOUT DEP. • BAH PARTIAL; Basic Allowance for Housing, partial: Paid to members without dependents who are assigned to shipboard quarters or unit barracks. This allowance is not paid if assigned/occupying Government-leased quarters.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
25 (cont)	ENTITLE-MEMTS (con't)	• CLOTHING BMA and STD; Basic Maintenance Allowance and Standard Maintenance Allowance (Clothing Allowance): Paid only to enlisted members for the purchase/ maintenance of uniform items. • REG BAS and OFF BAS; Basic Allowance for Subsistence: Paid to members assigned to a unit without a Government dining facility. Officers always receive BAS since the Government does not provide meals to officers. • ENL BAS; Enlisted Basic Allowance for Subsistence: A type of BAS paid to enlisted members assigned to a duty station that has a government dining facility. If the member is required to eat meals at the dining facility, there will be a deduction shown in block 27, itemized as DISC MEAL RATE, which partially offsets the ENL BAS entitlement. • CAREER SEA PAY; Career Sea Pay: Paid to eligible members serving onboard a career sea pay eligible vessel. This income is taxable. • CAREER SEA PREM; Career Sea Pay Premium: An additional amount of sea pay paid each month beyond 36 consecutive months of sea duty. This income is taxable.
26	ALLOT-MENTS	Allotments are monthly deductions for direct payments to payees as requested by the member. Some of the most common types of allotments are: BOND - U. S. Savings Bonds CFC - Combined Federal Campaign CGA ASSOC - CG association dues CGMA - CG Mutual Assistance DEPENDENT - support to dependents INSURANCE - insurance premium LOAN - loan payment SAVINGS - savings NAVY M-AID - Navy Mutual Aid Insurance premium HOME MORT - home loan payment VEAP - enrolled in Veteran's Education Assistance Program **NOTE:** If you have enrolled in an educational program under the GI Bill of 1984 or Montgomery GI Bill, you will see "GI BILL" or "MGIB" in this block, even though they are not allotments. They actually reduce your entitlement to base pay and taxable income by the amount contributed during that year. Enrollment in the Reserve Montgomery GI Bill will not be displayed since there is no contribution by the member.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
27	DEDUC-TIONS	Deductions are administrative reductions from your gross pay in compliance with law and regulations. Some of the most common types of deductions are: * ADEQUATE QTRS; Adequate quarters. Members assigned to government family quarters (leased or owned), or single government leased quarters, will have BAH II WITH DEP shown in block 25, and an identical ADEQUATE QTRS amount in block 27. * FEDERAL TAX; Federal tax withholding. The amount withheld is based on your marital status and the number of exemptions shown in block 41, which you claimed when you filed your most recent IRS Form W4. * STATE TAX; State tax withholding. Not every state requires withholding. The amount withheld is based on your marital status and the number of exemptions (or dollar amount) in block 36, which you requested when you filed your applicable state form. * FICA TAX; Federal Insurance Contribution Act withholding, also known as Social Security tax. Only basic pay is subject to this deduction, at a rate determined annually by Congress. * SGLI; Servicemembers' Group Life Insurance. The monthly premium cost of your Government life insurance coverage if you have coverage for yourself only. * SGLI/FAMILY; Family Servicemembers' Group Life Insurance. The monthly premium for member and spouse government life insurance. * TSP-BASE-DEF; Amount contributed to TSP from Base Pay. * TSP-SPEC-DEF; Amount contributed to TSP from Special Pay. * TSP-INCENT-DEF; Amount contributed to TSP from Incentive Pay. * TSP-BONUS-DEF; Amount contributed to TSP from Bonus Pay. * DISC MEAL RATE; Discount Meal Rate. Meal charge for meals provided at a government dining facility. * OVERPAYMENT; The deductions block will also indicate amounts withheld for repayment of overpayments or debts to the Government. **NOTE:** The "Remarks" section at the bottom of the LES will explain the situation; the amount of the original debt, the amount collected this period and the balance due.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
28	AMOUNT BF	The amount brought forward (unpaid balance) from the previous month. It should be identical to the amount in block 33 of the previous month's LES.
29	ENTITLE-MENTS	The total sum of block 25 amounts.
30	ALLOT-MENTS	The total sum of block 26 amounts.
31	DEDUC-TIONS	The total sum of block 27 amounts.
32	NET EARNINGS	Block 28 plus block 29 minus blocks 30 and 31. This is your total take home pay for the PERIOD COVERED by the LES.
33	AMT TO BE CF	Any amount unpaid this period. This amount should be identical to the amount in block 28 on your next month's LES.
34	INCOME YTD	Total income subject to state tax withholding this calendar year including this period.
35	TAX W/H YTD	Total state income tax withheld this calendar year including this period.
36	EXEMPT	Your marital status and number of allowances claimed or the dollar amount of exemption claimed.
37	LEGAL RESIDENC E	The state you claim as your legal residence for state tax purposes.
38	TAX INC THIS PD	Income subject to federal income tax withholding for this period.
39	INCOME YTD	Total income subject to federal income tax withholding this calendar year including this period.
40	TAX W/H YTD	Total federal income tax withheld this calendar year including this period.
41	ALLOW-ANCES	Your marital status and number of allowances claimed for federal income tax withholding purposes.
42	ADD'L W/H	Additional federal tax withheld for PERIOD COVERED as requested on your most recently filed IRS Form W-4.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
43	FICA WAGES	Wages subject to FICA (Social Security) tax withholding for this period.
44	FICA WAGES YTD	Total wages subject to FICA (Social Security) tax this calendar year including this period.
45	FICA TX YTD	Total FICA (Social Security) tax withheld this calendar year including this period.
	REMARKS	This section frequently contains items of importance as well as additional information about your leave and earnings. It may simply call your attention to one of the amounts shown on the LES or it may address other PMIS/JUMPS issues. In any case, the remarks are important, and if you don't understand them, or any other area of your LES, you should get an explanation as soon as possible from your unit's SPO or administrative officer, executive petty officer, or executive officer as appropriate. Don't forget to let your supervisor know as well.

Review and Validation

Purpose

The Review and Validation of the Leave and Earnings Statement is conducted as a cross check to determine if information submitted via the SPO is correct with respect to the related entries on the LES.

Monthly Validation

The SPO shall verify correct posting of documents input to PMIS/JUMPS by reviewing each member's monthly Leave and Earnings Statement (LES). The review shall consist of matching each document submitted (between the last end-month compute cycle cut-off and the current end-month compute cycle cutoff) with related Entitlement, Deduction, and remarks entries on the LES.

If	Then
All documents input during the month have correctly posted to the LES	The entry "Posting Verified Correct" shall be made on the LES and shall be initialed and dated.
One or more documents have not correctly posted to the LES	Conduct research to determine why: • See if document is on the current PMIS/JUMPS Feedback Report. • Research the Recents file and Segments. • Contact PSC (MAS) if these attempts fail. • Enter on the LES "Posting Verified Correct Except _____" with date and initials when cause has been determined. • Track un-posted documents on next month's LES.
A member's LES is missing	Take the following action: • Review the Reporting Endorsement on Orders to ensure that the OPFAC and Cost Center Code are correct for the member. • Contact member's prior unit if member is new, to see if it was forwarded there. • Send an E-mail request to PSC (MAS) for a replacement copy if it's not found.
An entire unit's LES's are not received	Contact PSC (MAS).

Continued on next page

Review and Validation, Continued

Audit of LES Upon Transfer

When a new member reports aboard, the SPO shall:

- Audit the member's first LES at the new duty station and input appropriate documents to stop/start necessary entitlements.
- The entry "Audit of LES Completed" shall be made on the LES with the entry dated and initialed.

Leave Errors on the LES

Purpose

This section denotes procedures if errors in a member's leave balance are discovered during a monthly LES review.

Requests for Audits

PSC (mas) will perform leave audits for discrepancies involving periods over three days. Requests should be researched by the SPO to ensure that the request involves a clear period of leave charged but not taken, or clear discontinuity in the balance shown on the LES.

PSC Action

PSC will take the following action upon receipt of inquiries from SPOs.

If	Then
Member's LES, leave segments (62 & 72), SOI segment (70), and current PMIS documents balance	No further action will be taken.
Member's LES, leave segments (62 & 70), SOI segment (70), and current PMIS documents do not balance	A leave audit will be performed consisting of documents processed during the current and prior fiscal year.

Explanation of Complex Areas on the LES

Purpose

The use of this section is to familiarize the user at a SPO with some of the trouble spots involved with an LES and show methods of resolution.

Computation of Rates of Pay in Items 25 and 27 of the LES

The LES reflects all pay and allowances credited to the member for the period covered by the LES. Rates of pay and allowances are provided in the Coast Guard Pay Manual, COMDTINST M7220.29 (series).

The following pay and allowances are based on a 30 day month:

- Basic Pay
- Officer Basic Allowance for Subsistence
- Basic Allowance for Housing
- Family Separation Housing
- Clothing Maintenance Allowance
- Personal Money Allowance
- Hardship Duty Pay-Location
- Career Sea Pay
- Career Sea Pay Premium
- Responsibility Pay
- Diving Pay
- Special Duty Assignment Pay
- Aviation Career Incentive Pay
- Flight Pay

The following rules apply to pay and allowances which are based on a 30 day month:

Item	Rule	Exception
1	No payment is made for the 31st day of the month	When members serve less than 30 days of active duty. Pay is computed on the actual number of days served (including the 31st day of the month).
2	When a member serves only a portion of a month, pay for that month will be computed at a daily rate of one-thirtieth of the monthly rate.	[redacted]
3	When service begins during a 31 day month and continues through the end of the month, pay will be credited through the 30th day	As provided in Item 1 listed above.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Rates of Pay in Items 25 and 27 of the LES, Continued

The LES reflects all pay and allowances credited to the member for the period covered by the LES. Rates of pay and allowances are provided in the Coast Guard Pay Manual, COMDTINST M7220.29 (series), continued:

Item	Rule	Exception
4	When service begins on the 31st day of the month, pay will not be credited for that day.	As provided in Item 1 listed above.
5	Pay is deducted when an enlisted member is on an unauthorized absence or other nonpay status. One thirtieth of one month's pay will be deducted for each day of absence in a nonpay status. No pay is lost for unauthorized absence on the 31st day of the month.	• When it is the first day of absence. • When the member was credited with pay for the 31st day as stated in Item 1.
6	Any member who enters active service during February and serves at least 30 consecutive days active duty, is entitled to 1 months pay, less the number of days expired before entry on active duty.	[redacted]

The following table illustrates how pay will be computed for members serving at least 30 consecutive days which begin or end in February:

Period Served in Feb		Number of Days Pay
1-28	(28-day month)	30
1-28	(29-day month)	28
1-29	(29-day month)	30
28th	(28-day month)	3
29th	(29-day month)	2
21-28	(28-day month)	10
21-29	(29-day month)	10

Continued on next page

Explanation of Complex Areas on the LES, Continued

Saved Leave Balance (SLB) Statement in Remarks Block

Members on Active Duty on 31 August 1976 will have a SLB statement in the remarks block of the LES.

Under 37 USC 501, Public Law 94-361, effective 1 September 1976 leave accrued and later sold would be paid based solely on a member's basic pay.

The following table gives related information as it occurs in date order.

Date	Saved Leave Balance Effect
31 August 1976	A member's accrued leave balance as of this date became the Saved Leave Balance (SLB) to which the "Saved Leave" provisions apply. • Saved Leave Balance cannot exceed 60 days. • Saved Leave Balance is subject to reduction when leave is taken or sold, and once reduced cannot be restored. • Saved Leave Balance can never be greater than a member's regular leave balance.
Prior to 1 September 1976	Leave accrued prior to this date could be sold based on Basic Pay, plus standard rates for housing and subsistence. Leave accrued on or after this date can be sold based solely on Basic Pay. SLB is "grandfathered", and can be sold based on the pre-1 September 1976 rules.
After 1 September 1976	Following each period of leave taken, or when leave is sold, SLB must be recalculated. To determine if there has been a change in SLB, the following steps must be taken: ▪ Determine the regular leave balance at the end of the month <u>prior</u> to the month in which leave was taken or sold. ▪ Add the number of days that were earned <u>through the day of return from leave/date leave sold.</u> ▪ Subtract the number of days leave taken sold. ▪ If the resulting leave balance is equal to or greater than SLB, SLB remains unchanged. If the resulting leave balance is less than SLB, then SLB is reduced to the newly calculated balance.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Accrual of Leave in Excess of 60 Days

(Items 11 and 16 of the LES)

Members assigned to certain types of duty may carry forward up to 90 days of accrued leave into a new fiscal year provided the duty meets the criteria set forth in Article 7-A-15 of the CG Personnel Manual, COMDTINST M1000.6 (series). All such leave in excess of 60 days must be used by the end of the third year following the fiscal year in which the authorizing duty occurred.

Unit commanding officers shall notify PSC (mas) at the end of each fiscal year of those members that they believe qualify for accumulation of leave in excess of 60 days. PSC (mas) will verify each member's entitlement, and make appropriate adjustments. These adjustments will not be made until after the December end-month compute cycle, and will be reflected on the January LES of qualifying members.

Any member identified by the unit commanding officer who does not qualify for leave carry over under the established criteria will be notified by PSC (mas) in writing (either letter, message, or email as appropriate).

Sold leave in Items 14 and 17 of the LES

Effects of sold leave are as follows:

- Item 14 will show leave sold this pay period.
- Item 17 will show the cumulative amount of leave sold during the member's career.
- The maximum amount of leave sold on or after 9 February 1976 is 60 days.
- SPOs must verify that leave sold is properly recorded in PMIS/JUMPS and reflected in Item 17 of the LES. If the SPO discovers an error in Item 17, they shall notify PSC (MAS).

Excess Leave (Items 11 and 12 of the LES)

Specific instructions on computation and checkage of excess leave are contained in Section 2-I, Coast Guard Pay Manual, COMDTINST M7220.29 (series). Items 11, 12 and the Remarks block will indicate when a member enters an excess leave status.

When excess leave situations occur and are not properly reflected on the LES, the SPO shall notify PSC (MAS) via E-Mail.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Reserve Leave

The PMIS/JUMPS system will accrue leave for reserve members while performing active duty with pay for 30 consecutive days or more until there has been a break in the continuous active duty period (e.g., performs a day of IDT, appropriate duty, active duty without pay, or no duty).

The following illustrates various types of Reserve Leave and its effect on the LES.

If	Then
Reserve members earn leave when performing active duty with pay for a period of 30 consecutive days or more	Their leave is accounted for in items 11 through 17 of the LES.
The member is entitled to lump sum leave upon break in continuous active duty with pay	The SPO shall submit Action Code R975. The system allows 30 days for the member's SPO to indicate leave sold on Action Code R 975 and will zero out the leave balance if a R 975 is not submitted. **Note:** If, at the end of an ADT period, the member continues on ADT with no break in active service (ie, "back-to-back" orders), leave may be carried forward or sold at the member's option. Should sale be elected, leave may be sold in half-day increments up to the member's leave balance at the time of entitlement.
Leave errors are detected on a reserve member's LES	Errors shall be handled the same way as for active duty members. Refer back to the section on leave errors in this chapter.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Leave Nonaccrual

(Items 11 and 12, and Remarks Block of the LES)

A member does not earn (accrue) leave under the following circumstances:

- Unauthorized absence (more than 24 hours).
- Custody by civil authorities.
- Sickness due to misconduct.
- Confinement adjudged by a court-martial.
- Excess leave.
- Leave without pay.
- Indefinite leave granted personnel awaiting appellate review of courts-martial.
- Active duty of less than 30 days.

General Leave Non-accrual Rules

The following are general rules for computing leave non-accrual:

- No more than 2.5 days leave accrual can be deducted for any full calendar month.

- For partial calendar months, the number of days of non-accrual may not exceed the number of days that could have been accrued during that period.

- The number of days of leave non-accrual will be computed on a day-for-day, month-for-month basis, including the 31st day of a 31-day month and counting February as 28 days (29 in a leap year). See examples on the following pages.

- Any group of consecutive leave days that occur in one month will be treated as a single period. Any groups of non-consecutive leave days that occur in one month will be considered separate periods when determining the amount of leave non-accrual (not to exceed 2.5 days per month). See examples on the following pages.

- Per the provisions of Chapter 7 of the CG Personnel Manual, COMDTINST M1000.6 (series), leave non-accrual is considered deductible time for which pay and allowances will be forfeited. PSC (mas) will take the necessary actions to debit a member's account for non-accrued time as soon as it is identified. Debits for leave non-accrual are to be made at the rates that were in effect during the last good leave period(s) in the member's record. Note: Leave non-accrual debits are always manually computed since the last good leave period(s) is(are) often "out of range" (ie, more than three months in the past).

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-accrual for Periods Within the Same Month

The following tables provide three scenarios involving leave non-accrual periods within a single month.

Scenario #1:

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89May01 - 89May02	2 Days	0.5 Day
89May04 - 89May10	7 Days	0.5 Day
89May12 - 89May24	13 Days	1.0 Day
Total	22 Days	2.0 Days

Note: Member could accrue only 1.0 day of leave from 5/1 through 5/10 and a total of 2.0 days up to 5/24.

Scenario #2:

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89May04 - 89May10	7 Days	1.0 Day
89May15 - 89May27	13 Days	1.5 Days
Total	20 Days	2.5 Days

Note: Member has lost all leave accrual as the periods of non-accrual covered periods that could have earned leave during the month.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-accrual
For Periods Within the Same Month,(Continued)

Scenario #3:

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89May01 - 89May02	2 Days	0.5 Day
89May15 - 89May20	6 Days	0.5 Day
89May25 - 89May31	7 Days	1.0 Day
Total	15 Days	2.0 Days

Note: This is different from scenario 1 as the total days are less, but leave days non-accrued are the same based on the periods of leave covered.

Computation of Leave Non-accrual when Period Bridges Two Months

When the leave non-accrual period bridges two months, the leave forfeited for each month is calculated separately. Two scenarios are presented below.

Scenario #1: Member in non-accrual status 89Feb27 - 89Mar02

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Feb27 - 89Feb28	2 Days	0.5 Day
89Mar01 - 89Mar02	2 Days	0.5 Day
Total	4 Days	1.0 Day

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-accrual when Period Bridges Two Months (Continued):

Scenario #2: Member in non-accrual status 89Jul11 - 89Aug02

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Jul11 - 89Jul31	21 Days	2.0 Days
89Aug01 - 89Aug02	2.0 Days	0.5 Day
Total	23 Days	2.5 Days

Note: Deductible days are counted day-for-day based on the calendar month.

Computation of Leave Non-accrual When the Period Extends More Than Two Months

Two and one half days leave will be forfeited for each whole calendar month involved. Days in the beginning and ending months will be treated as a period bridging two months. The following three scenarios represent leave non-accrual for periods extending more than two months.

Scenario #1: Member in non-accrual status 89Feb26 - 89May02

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Feb26 - 89Feb28	3 Days	0.5 Day
89Mar01 - 89Mar31	31 Days	2.5 Days
89Apr01 - 89Apr30	30 Days	2.5 Days
89May01 - 89May02	2 Days	0.5 Days
Total	66 Days	6.0 Days

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Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-Accrual When the Period Extends More Than Two Months, (Continued)

Scenario #2: Member in non-accrual status 89Jan18 - 89Mar31

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Jan18 - 89Jan31	14 Days	1.5 Days
89Feb01 - 89Feb28	28 Days	2.5 Days
89Mar01 - 89Mar31	31 Days	2.5 Days
Total	73 Days	6.5 Days

Scenario #3: Member in non-accrual status 89Jul27 - 89Sep13

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Jul27 - 89Jul31	5 Days	0.5 Day
89Aug01 - 89Aug31	31 Days	2.5 Days
89Sep01 -89Sep13	13 Days	1.5 Days
Total	49 Days	4.5 Days

Continued on next page

Explanation of Complex Areas on the LES, Continued

Effect of Leave Non-Accrual on Pay & Allowances

The following two scenarios illustrate the effect of leave non-accrual on pay and allowances.

Scenario #1

Leave Dates	No. of Days of Non-Accrual
97Feb15 – 97Feb19 (5 days annual leave)	None
97Jun20 (1 day excess leave)	0.5 non-accrued

Note: Since leave non-accrual is time for which pay and allowances are not due nor payable, PSC (mas) would in the above scenario debit one-half day of the pay and allowances to which the member was otherwise entitled on 97Feb19, the last good leave period in the member's record. PSC (mas) generates debits based on a report of leave non-accrual that is run with each end-month compute cycle. Members who have non-accrued time for any reason (excess leave, etc.) can expect to see their pay debited for the non-accrued period(s) in the month immediately following the month in which the non-accrued time posted to their LES.

Scenario #2

Leave Dates	No. of Days of Non-Accrual
97Mar31 – 97Apr01 (2 days annual leave)	None
97Apr05 (1 day excess leave)	0.5 non-accrued
97Apr12 – 97Apr18 (7 days excess leave)	1.0 non-accrued

Note: In this scenario PSC (mas) would debit one-half day of the pay and allowances to which the member was otherwise entitled on 97Apr01 for the non-accrual chargeable for the 1 day of excess leave on 97Apr05 and one-half day of the pay and allowances to which the member was otherwise entitled on both 97mar31 and 97Apr01 for the non-accrual chargeable for the 7 days of excess leave on 97Apr12-97Apr18. Note that the member would only be debited on 97Mar31 in this scenario for daily rate items such as Leave Rations as he/she had no entitlement to monthly rate items (Basic Pay, BAH, etc.) on that date.

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Explanation of Complex Areas on the LES, Continued

SLB Reduction Example

The following are examples of how Saved Leave Balance is reduced and the end result as posted on the LES.

On 31 August 1976, member's leave balance was 50 days. All 50 days became SLB. August 1976 end-month LES would show BALANCE EOM 50.0, SAV LV BAL 50.0

On 23 May 1977, the member returned from 20 days leave. At this time, the member had a 72 day leave balance prior to charging the 20 days leave. Subtracting the 20 days leave reduced the leave balance to 52 days. Since this 52 day leave balance exceeded the 50 day SLB balance, no SLB reduction resulted. May 1977 end-month LES would show BALANCE EOM 52.5, SAV LV BAL 50.0.

On 30 August 1977, the member returned from 13 days leave. Leave balance prior to charging leave was 60 days. Subtracting the 13 days leave taken reduced the leave balance to 47 days. Since this 47 day leave balance was less than the 50 day SLB balance, SLB was reduced from 50 to 47 days. August 1977 end-month LES would show BALANCE EOM 47.0, SAV LV BAL 47.0

On 5 October 1977, the member returned from 10 days leave. Subtracting this 10 days leave from a leave balance of 50.0 equals 40.0 October 1977 end-month LES would show BALANCE EOM 42.0, SAV LV BAL 40.0

On 11 January 1978, the member reenlisted and wanted to sell 10 days leave. The member should be advised that sale of 10 days leave would result in an SLB reduction. This is because on 11 January 1978, the member has a total leave balance of 48.0, composed of 40 days SLB and 8 days non-SLB. If the member does not want to reduce the SLB balance, he/she should sell no more than 8 days leave. Should the member at this point elect to sell 8 days non-SLB leave, his/her remaining lump sum leave entitlement will be: 52 days total leave, of witch 40 days are worth the higher SLB rate.

Subject	Page
A	
Abbreviations; Foreign Country	Page E-9-2
Abbreviations; Standard for Transfer of Personnel	Encl (2)
Abbreviations; State & U. S. Possession	Page E-9-1
Absence, Unauthorized	10-B-4
Absentee; Reporting Return of	10-B-10
Accelerated Payment of SRB	6-C-6
Accessions	3-A-1
Accounting Data for TDY	2-B-48
Active Duty for Training (ADT)	2-C-1
Active Duty For Special Work (ADSW)	2-D-1
Advance of Federal Earned Income Credit (EIC)	8-B-2
Administrative Remarks	10-A-2, Encl (6)
Advances; Pay, BAH, OHA, and Interim HA	6-B-6
Allotments and Bonds	8-A-2
Amendments to TDY Orders	2-B-24
Annual Reserve Retirement Point Statement	6-D-19
Annual Reserve Screening Questionnaire	2-C-6
Annual Verification of CG-4170A and SGLV-8286	5-C-2
Armed Forces ID Cards	5-D-6
Assignment/Termination of Government Quarters	5-D-15
Automatic Stops of Pay & Allowances (due to PCS)	2-A-7
Aviation Career Incentive Pay (ACIP)	7-A-2
Award Codes	Encl (10)
Awards; Reporting of	10-A-3
B	
BAH/Dependency/Emergency Data Validation	5-A-2
BAS	7-B-2

Subject	Page
C	
Career Status Bonus (CSB)	7-D-2
Casualty Reporting	5-A-19, E-7-1
Collections, In-Service Debt	9-A-2
Commanding Officer Advancements	4-A-3
Company Commander Insignia	4-C-12
Computation of Service	Appendix (C)
Continuance on Active Duty	3-C-1
Corrections/Changes of Name or SSN	5-D-18
Courts-Martial	10-B-3
D	
Death Gratuity	6-B-9
Dependency Changes	5-B-2
DEERS	5-B-17
Desertion	10-B-7
Direct Deposit	6-A-2
Directives Referenced	1-8
Disability Payments to Reserve Members	6-D-21
Discharge, Checklist for	3-B-21
Drill Orders	6-D-5
E	
Educational Accomplishments	4-C-2
Electronic Assignment Data Card	5-D-13
Employment Verification	5-D-12
Enlisted to Cadet Status Processing	3-B-14
Extensions	3-C-2

Subject	Page
F	
Family Separation Allowance (FSA)	7-B-3
Family Subsistence Supplemental Allowance (FSSA)	7-B-8
Federal Income Tax Withholding	8-B-2
Federal or State Tax Adjustments	8-B-17
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	7-A-4
Forms Referenced in this Manual	1-11
Funeral Duty Pay for Reservists	7-A-8
G	
Garnishment (Involuntary Allotment)	9-A-4
Government Quarters Assignment/Termination	5-D-15
H	
High Pressure Chamber Hazardous Duty Incentive Pay	7-A-5
Headquarters Advancement	4-A-2
Home Address Change	5-D-11
Hostile Fire (Imminent Danger) Pay	7-A-6
I	
Identification Cards (Active Duty, Reserve, and Retired)	5-D-6
Identification Cards (Dependent)	5-B-8
Imminent Danger Pay	7-A-6
Inactive Duty Pay Prerequisites	6-D-2
Inactive Duty Pay Process	6-D-3
Indebtedness	9-A-2
Individual’s Record of Small Arms Training	4-C-4

Subject	Page
L	
Leave Authorization	5-D-2
Leave and Earnings Statement (LES)	6-A-3, Apendix F
Leave Carried over in Excess of 60 Days	5-D-4
Liberty Combined with TDY Travel	2-B-27
M	
Message Order	2-B-35
Mobile Units	6-C-2
Move-In Housing Allowance (MIHA)	7-B-7
N	
Name Change	5-D-18
NATO Travel Order	2-A-9
Net Pay Advice Message	6-A-5
Non-judicial Punishment (NJP)/Courts-Martial	10-B-2
Nonreceipt of Allotment or Bond	8-A-4
Nonreceipt of W-2 Form	8-B-12
Nonreceipt of Pay	6-B-3
O	
Officer Uniform Allowance Claim Worksheet	7-B-10
Order (PCS Transfer Process)	2-A-2
Order (Reserve, ADT)	2-C-2
Order (TDY)	2-B-2
Overpayments	9-A-2
Overseas Transfer, Checklist for	2-A-6
Overseas Housing Allowance (OHA)	7-B-7

Subject	Page
P	
Pay (Mobile Unit)	6-C-2
Pay (Nonreceipt)	6-B-3
Pay (Recruits)	6-C-5
Pay (Reserve)	6-D-1
Pay Entitlements Affected by TDY	2-B-29
Payment Option Election (POE)	6-A-2
Permanent Change of Station (PCS)	2-A-1
Permanent Change of Station (Departing), Checklist for	2-A-3
Permanent Change of Station (Reporting), Checklist for	2-A-5
Permissive Travel Authorization	5-D-17
Personal Clothing & Equipment Record	5-D-9
Personnel Data Extract (PDE)	5-C-7
Personnel Data Information File (PDIF)	5-C-6, E-5-1
Phone Calls, Rules for Claiming	2-B-47
R	
Recalled Retired Members	3-A-4
Recalled RET-2 Members	3-A-5
Reenlistments	3-C-2
Reimbursement Methods for TDY	2-B-40
Remissions	9-B-2
Release from Active Duty (RELAD), Checklist for	3-B-20
Reserve Retirement Separations	3-B-25
Reserve Family Member Identification Card	5-B-12
Reservists, Funeral Duty Pay for	7-A-8
Retired Pay Projection	6-B-10
Retirement, Checklist for	3-B-22
Retirement, Reserve Separations	3-B-25
Return of Absentee or Deserter	10-B-10

Subject	Page
S	
Savings Deposit Program	7-C-1
School Codes	Encl (8)
Security Clearances	5-C-8
Selective Reserve (SELRES) Enlisted Bonus Programs	Encl (6)
Separations	3-B-1
Separation Travel Order	3-B-13
Servicemembers' Group Life Insurance (SGLI)	5-A-7
SGLI Family Member Coverage	5-A-15
Signature of Responsible Officer	1-6
Social Security Number Change	5-D-18
Special Payments	6-B-3
Standard Abbreviations for Transfer of Personnel	Encl (2)
Standard Separation Letters	Encl (4)
State Income Tax Withholding	8-B-3
State Tax Listing	8-B-4
Statement of Creditable Service	5-C-3
T	
Taxes (Federal)	8-B-2
Taxes (State)	8-B-3
Temporary Duty (TDY)	2-B-1
Temporary Duty, Checklist for	2-B-37
Temporary Duty Order, Preparation of	2-B-30
Temporary Duty Reimbursement Methods	2-B-40
Training and Educational Accomplishments	4-C-2
Thrift Savings Plan (TSP)	8-C-2
Transcript of Sea Service (TOSS)	5-C-9
Travel Claim	2-B-4
Travel Claim, FAX Transmittal of	2-B-18
Travel Claim, Manual Submission of	2-B-44
Travel Orders, Blanket	2-B-25
Travel Orders, Group	2-B-26
Travel Orders Letter (Example)	2-B-34
TRICARE Dental Program	5-B-4

Subject	Page
U	
Unauthorized Absence	10-B-4
Uniform Allowance Claim (Officer)	7-B-10
Unit Attendance Record (UAR)	6-D-10
Unit Travel System	2-B-5
V	
Veterans Educational Assistance Program (VEAP)	4-C-5
W	
W-2 Form	8-B-12
Waivers of Claims for Erroneous Payments	9-B-3
Waiver of Pension/Disability Compensation or Retired Pay	6-D-17
Warrant Officer Appointments	4-B-2

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