

E-Mail ALSPO N/12

Subj: CHANGE TO EI-PDR SCANNING AND VERIFICATION PROCESS

Ref: (a) [CG Servicing Personnel Office \(SPO\) Manual, PSCINST M5231.3 \(series\)](#)
(b) [Military Personnel Data Records \(PDR\) System, COMDTINST M1080.10 \(series\)](#)

Purpose This E-Mail ALSPO highlights important updates to the EI-PDR scanning and verification processes per reference (a), Part X, Chapter 4.

Background The Personnel Service Center's (PSC) Military Records (MR) Branch performs an initial quality assurance check of all documents received from SPOs to ensure authorized documents are properly formatted and readable prior to uploading into an EI-PDR. Because of imaging software and storage space limitations, the current processes must be updated to meet Coast Guard requirements for imaging EI-PDR documents.

Approximately 33% of the documents submitted for inclusion into the EI-PDR are not authorized, unreadable, or improperly formatted. Links to training and other aids are provided below.

Responsibilities Per reference (b), SPOs are responsible for ensuring authorized electronically imaged (EI) PDR documents are properly formatted and emailed to MR for imaging.

Clarification Only submit forms CG-4170 (BAH/Dependency Data) and CG-2020D (Designation of Beneficiaries) for entry into the EI-PDR if they are initial entries or if they contain changes from previous version. See enclosure (1) of reference (b) for more details.

Continued on next page

E-Mail ALSPO N/12

Subj: CHANGE TO EI-PDR SCANNING AND VERIFICATION PROCESS

SPO Follow these steps to scan and e-mail documents for the EI-PDR:
Procedures

Step	Action	Remarks
1	Identify and label documents prior to Scanning	<p>Review reference (b) to ensure the document is authorized in the EI-PDR. A list of authorized EI-PDR documents can be found on MR's website at http://www.uscg.mil/psd/mr/EI-PDR%20Crosswalk.xls.</p> <p>For documents that do not contain an EMPLID, write the EMPLID on the upper right hand corner of the document. All documents relating to a member's dependents (e.g., birth certificates, divorce decrees, marriage certificates, adoption papers, etc.) must contain the member's EMPLID.</p> <p>Unit awards and page 7s must be individually scanned and submitted for each member. If EMPLIDs or SSNs of other members are visible on the document, block out the PII before scanning.</p> <p>All submissions to the EI-PDR must be: Authorized – IAW enclosure (1) of reference (b). Legible – Clear and easy to read (not too dark or too light). Complete – All pages are submitted and all required information is filled in.</p>

Continued on next page

E-Mail ALSPO N/12

Subj: CHANGE TO EI-PDR SCANNING AND VERIFICATION PROCESS

SPO Procedures (**continued**)

Step	Action	Remarks												
2	Scan documents	<p>The below criteria applies to scanned documents:</p> <table border="1" data-bbox="467 611 1344 1350"> <thead> <tr> <th data-bbox="467 611 704 644">Criteria</th> <th data-bbox="704 611 1344 644">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="467 644 704 793">Scan in Black and White only</td> <td data-bbox="704 644 1344 793">EI-PDR documents are not authorized to be scanned in color. Scanning in Black and White allows for proper transfer into WebNow and reduces the file size of the document.</td> </tr> <tr> <td data-bbox="467 793 704 982">One member's record per scanned PDF file</td> <td data-bbox="704 793 1344 982">Multiple documents per attachment for the same member are allowed. Do not include documents for more than one member per PDF file. The scanned attachment file name must be the member's EMPLID (e.g., 1234567.pdf).</td> </tr> <tr> <td data-bbox="467 982 704 1094">Multiple attachments per email</td> <td data-bbox="704 982 1344 1094">Multiple attachments are authorized on one email as long as each PDF file is for a different member and is labeled correctly.</td> </tr> <tr> <td data-bbox="467 1094 704 1243">Adobe (.pdf) format</td> <td data-bbox="704 1094 1344 1243">PDF files are the required format for documents to ensure they can be opened by MR. The scanned documents must be legible and of good quality.</td> </tr> <tr> <td data-bbox="467 1243 704 1350">File size less than 10MB</td> <td data-bbox="704 1243 1344 1350">Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent or received by Outlook.</td> </tr> </tbody> </table>	Criteria	Description	Scan in Black and White only	EI-PDR documents are not authorized to be scanned in color. Scanning in Black and White allows for proper transfer into WebNow and reduces the file size of the document.	One member's record per scanned PDF file	Multiple documents per attachment for the same member are allowed. Do not include documents for more than one member per PDF file. The scanned attachment file name must be the member's EMPLID (e.g., 1234567.pdf).	Multiple attachments per email	Multiple attachments are authorized on one email as long as each PDF file is for a different member and is labeled correctly.	Adobe (.pdf) format	PDF files are the required format for documents to ensure they can be opened by MR. The scanned documents must be legible and of good quality.	File size less than 10MB	Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent or received by Outlook.
Criteria	Description													
Scan in Black and White only	EI-PDR documents are not authorized to be scanned in color. Scanning in Black and White allows for proper transfer into WebNow and reduces the file size of the document.													
One member's record per scanned PDF file	Multiple documents per attachment for the same member are allowed. Do not include documents for more than one member per PDF file. The scanned attachment file name must be the member's EMPLID (e.g., 1234567.pdf).													
Multiple attachments per email	Multiple attachments are authorized on one email as long as each PDF file is for a different member and is labeled correctly.													
Adobe (.pdf) format	PDF files are the required format for documents to ensure they can be opened by MR. The scanned documents must be legible and of good quality.													
File size less than 10MB	Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent or received by Outlook.													

Continued on next page

E-Mail ALSPO N/12

Subj: CHANGE TO EI-PDR SCANNING AND VERIFICATION PROCESS

SPO Procedures (continued)

Step	Action	Remarks
3	E-mail documents to ARL-PF-CGPSC-PSD-MR_DOCS	<p>Because of the influx of source documents, MR is experiencing a significant backlog. Once you email your submission(s) to MR, an auto reply email is immediately generated notifying you the email is in the queue for upload. Please do not resubmit documents emailed unless specifically requested by the PSC staff.</p> <p>SPOs are encouraged to add the word “URGENT” to the email subject line if the email contains board entries, alcohol incident documents, a rescinded award notification or a desertion notice. If uncertain, contact MR. Urgent documents are normally processed within one (1) business day. Documents are not viewable by SPOs until 24 hours after they are processed.</p> <p>Do not encrypt, password-protect or zip documents/email. Encrypted emails cannot be opened once delivered to the PSC folder. Per DHS and Coast Guard Policy, PII which is considered Sensitive But Unclassified (SBU) requires no special handling (i.e. encryption/password protection) when sent from/to uscg.mil or dhs.gov addresses.</p>
4	Save emails to file tracking folder	SPOs are encouraged but not required to create a centralized public e-mail folder to store e-mails sent to MR. Submit a help ticket to your local ESU/ESD IT helpdesk to have this done.

Training

SPOs are encouraged to conduct training on the EI-PDR scanning and verification process. PowerPoint training is located on the MR website: <http://www.uscg.mil/psd/mr/EI-PDR%20Presentation.ppt>.

Continued on next page

E-Mail ALSPO N/12

Subj: CHANGE TO EI-PDR SCANNING AND VERIFICATION PROCESS

Directives affected The contents of this E-Mail ALSPO message will be incorporated into the applicable sections of reference (a). This E-Mail ALSPO message provides interim guidance which expires one year from the date of issuance unless it is incorporated into an appropriate PPC publication, reissued, or cancelled.

Questions Direct questions regarding the content of this E-Mail ALSPO to YN1 Juan Calderon at (202) 493-1962, LCDR Christine Fern, PSC-BOPS, at (202) 493-1951 or by email ARL-DG-M-CGPSC-BOPS-C.

Released by Internet release authorized.

/s/
S. L. LEBRUSKA, CAPT, USCG
Commanding Officer

Copy: PSC (BOPS), (MR)

Authorized EI-PDR Documents

****Quick reference job aid for COMDTINST M1080.10I Only****

Document	Description
CG-2520	Application for Enlistment
CG-2842	Notice of Removal of Absentee Wanted Notice
CG-3211 (series)	Officer Candidate School Agreement
CG-3301	Enlistment Contract
CG-3301A	Statement of Understanding
CG-3301B	Agreement to Extend/Re-extension Enlistment
CG-3301C	Discharge and Reenlistment Contract
CG-3303	Achievement Sheet
CG-3307 (all)	Administrative Remarks (all)/Including PG 6 of overseas screening pkg
CG-3309	Record of Discharge, Release from Active Duty or Death
CG-3822	Injury Rpt for not misconduct/in-line of duty determination
CG-4082	Record of Professional Development (06/04)
CG-4714	Reserve Points from Previous Service
CG-4916	Active Duty Initial Information Form
CG-5310 (series)	Officer Evaluation Report (OPR/OER)
CG-5311	Request to Assign Competencies, Education, or Officer Speciality to a Position
CG-5314	Report on the Fitness of Admirals
CG-5315 (series)	Reviewer Comments
CG-5316	Warrant Officer Evaluation Report
CG-5317	Officer Evaluation Report (OER)
CG-5411	Statement of Understanding (SELRES GI Bill)
CG-5412	Termination/Recoupment Data (SELRES GI Bill)
CG-5588	Personnel Security Action Request (Rev 6/98)
CG- 7220A - Annex T	Enlistment Bonus Agreement (Non-Prior Service with Guaranteed "A" School or Prior Service with Qualifying Skill)
CG- 7220B - Annex T.1	Enlistment Bonus Agreement (Non-Rate Bonus)
CG- 7220C - Annex T.2	Enlistment Bonus Agreement (Striker Bonus)
CG-7220D	Critical Skills Training Bonus (CSTB) Agreement
CG-7220E	Critical Skills Retention Bonus (CSRB) Agreement
CG-7220F	Officer Accession Bonus (OAB) Agreement
CG-9556	Acceptance and Oath of Office
CGHQ-2511B	Statement of Creditable Service
CGHQ-3433	Statement of Service - Retired Personnel

Authorized EI-PDR Documents

****Quick reference job aid for COMDTINST M1080.10I Only****

Document	Description
CGHQ-4290	Transcript of Sea Service
CGHQ-4717	Statement of Service
CGHQ-4973	Computation of Retirement Point Credits
CGPPC/PSC/HR SIC 1071	Statement of Creditable Service
CGPPC/PSC/HR SIC 1072	Statement of Creditable Sea Service
CGPPC/PSC/HR SIC 1075	Transcript of Sea Service
CGPPC/PSC/HR SIC 2426	Career Status Bonus (CSB) Election
DD-4 (with annexes)	Enlistment/Reenlistment Document, Armed Forces of the US
DD-214 (All CG/Prior Svc)	Certificate of Release or Discharge from Active Duty
DD-215 (All CG/Prior Svc)	Correction to DD-214, Armed Forces of the US Report/Transfer of Discharge
DD-368	Request for Discharge or Clearance from Reserve Component
DD-553	Deserter/Absentee Wanted by the Armed Forces
DD-1300	Report of Casualty
DD-1882	Survivor Benefit Plan Election Change
DD-1883	Survivor Benefit Plan - Election Certificate
DD-1966	Record of Military Processing - Armed Forces of the US
DD-2366	Montgomery GI Bill Act of 1984 (MGIB)
DD-2366-1	Montgomery GI Bill Act of 1984 (MGIB), Increased Contribution Program
DD-2384-1	Notice of Basic Eligibility (NOBE)
DD-2648	Pre-separation Counseling Checklist - Active Component
DD-2648-1	Pre-Separation Counseling Checklist - Resv Component RELAD
DD-2760	Qualification To Possess Firearms or Ammunition
OPNAV 5510/413	Personnel Security Action Request
SGLV-8285	Request for Insurance (SGLI)
SGLV-8285A	Dependent Request for Insurance (SGLI)
SGLV-8286	SGLI Election and Certificate
SGLV-8286A	Family Coverage Election and Certificate
-----	Active Duty Agreements
-----	Administrative Discharge Board Final SECCEN Revocation, Denial, and Reinstatement of Security Clearance Memo
-----	Alcohol Incident Letter
-----	Application for Direct Commission
-----	Appointment Letter

Authorized EI-PDR Documents

****Quick reference job aid for COMDTINST M1080.10I Only****

Document	Description
-----	Award Certificates and Citations
-----	Birth Certificate/Adoption Papers/Court Orders - Dependent
-----	Birth Certificate/Certificate of Naturalization - Member
-----	Board for Correction of Military Records (BCMR) decisions
-----	Designation as CG Acquisition Specialty
-----	Designation as CG Aviator
-----	Designation as CG Medical Specialty
-----	Designation as Law Specialist
-----	Direct Access Disciplinary Rpt (all)
-----	Divorce Decree
-----	DNA Tracking for Prisoners
-----	Educational Transcripts/GED Results
-----	Entire separation pkg when PSC/District/TRACEN Cape May, or CG Academy directs separation
-----	Gov't Travel Card Program Recommendation/Acceptance Statement (Mbr initial submission only)
-----	Integration/Extension Letters
-----	Letters Obligating Service
-----	Marriage Certificate
-----	Medical/Physical Evaluation Board
-----	Member Self Validation
-----	Non-Selection/Lock-In Letters
-----	Personnel Record Review Boards (PRRB) decisions
-----	Punitive Letters
-----	Recall Orders
-----	Report(s) of civil arrest letter
-----	Request for Advance/Restoration/Rate Change, Removal of Designator, or Promotion
-----	Reserve Letter for 20 Years' Service
-----	Reserve Point Statements - Other Service
-----	Separation/Retirement Orders
-----	Social Security Card (Member Only)

Military Personnel Data Records (PDR) System

LCDR Christine Fern, PSC-BOPS-C

Mr. Jay Evans, PSC-PSD-MR



Agenda

- Overview/Purpose
- References
- Establishing PDRs
- Electronically Imaged-PDR (EI-PDR) Management
- EI-PDR Submission Process
- Common Submission Errors
- Questions



Overview/Purpose

The PDR System: Properly manage the CG's system of record for military personnel information

- Support pay/entitlements
- Support personnel decisions (boards/panels)

This Presentation: Focus on EI-PDR management and improve document submissions



References

- COMDINST M1080.10 (series)
Military Personnel Data Record (PDR) System Manual
- ALCGPSC 050/12
Establishing Military Member EI-PDR
- PPCINST M5231.3(series), SPO Manual
- COMDTINST M6000.1 (series), CG Medical Manual



Establishing PDRs

SPO-PDR

- TRACEN Cape May
- CG Academy
- SPO (members reporting from a different location)

EI-PDR

- Member's first unit SPO after initial training



EI-PDR Management

SPOs

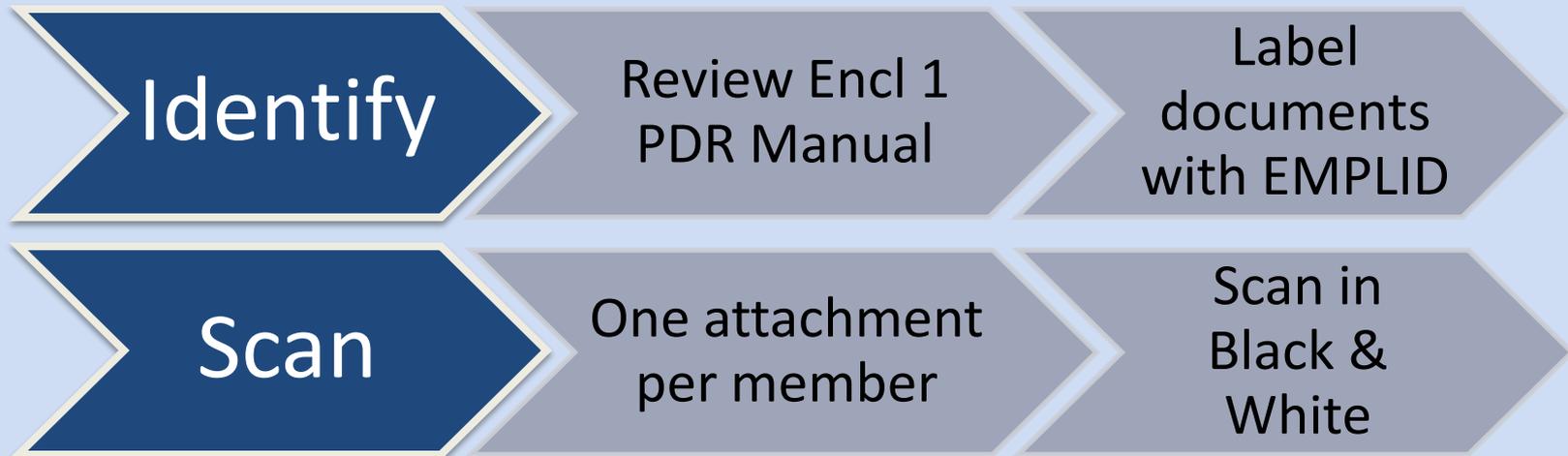
- Review the EI-PDR to identify missing documents
- Scan missing documents and forward to PSC-PSD-MR for inclusion in EI-PDR
- Do not send originals or paper copies (email only)

PSC-PSD-MR

- Maintains the EI-PDR
- Ensures only authorized documents are uploaded to the EI-PDR
- Properly disposes of all documents received that are not authorized in the EI-PDR



EI-PDR Submissions



- ✓ Only authorized documents should be sent to Military Records
- ✓ Refer to COMDTINST M1080.10I or enclosed EI-PDR Crosswalk**
- ✓ All documents must contain the member's EMPLID
- ✓ Scanned file name must include the member's EMPLID (1234567.pdf)



** The crosswalk is only applicable for this edition of the PDR Manual



EI-PDR Submissions Cont'd



- ✓ Scanned PDF must be authenticated, legible and complete copies of originals
- ✓ Minimize file size using the guide in Part X, Chapter 4 of the SPO Manual
- ✓ Do not encrypt if emailing from uscg.mil or dhs.gov email address



EI-PDR Submissions Cont'd



✓ Auto response email is sent upon submission to Military Records Staff



Common Submission Errors

- Documents scanned in color (not black and white)
- Documents sent in a foreign language and not translated
- Documents not marked with the member's EMPLID
- Documents labeled with another member's EMPLID/SSN
- Duplicate Submissions

These common errors add to the backlog and result in additional processing time for SPOs and MR staff.





Common Submission Errors

- **Unauthorized Documents**
- **Poorly Scanned Images**
- **Files with multiple member documents**
- **Incomplete Documents (no signatures or missing pages)**
- **Medical Documents sent in error**

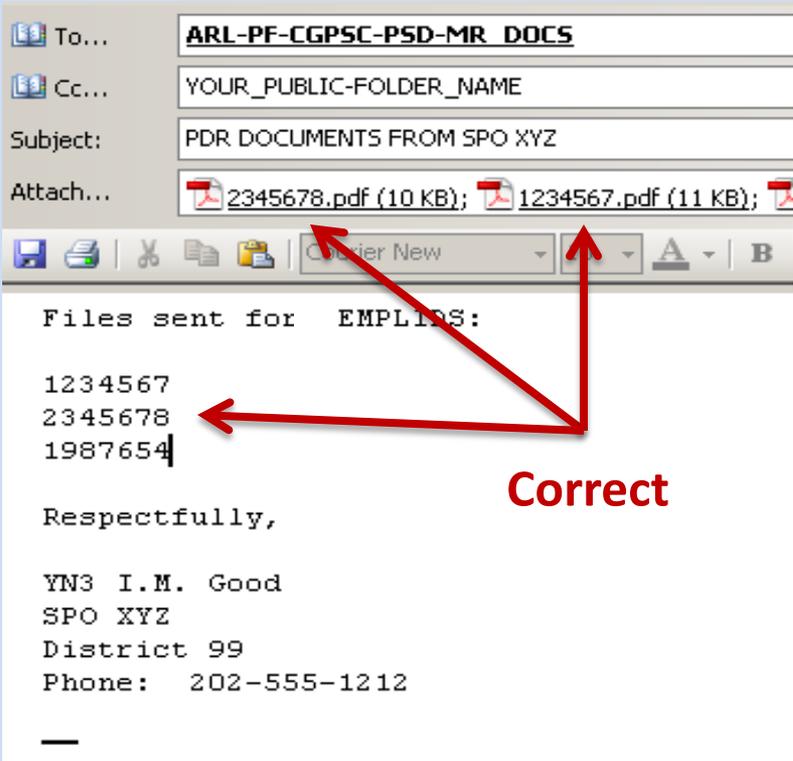
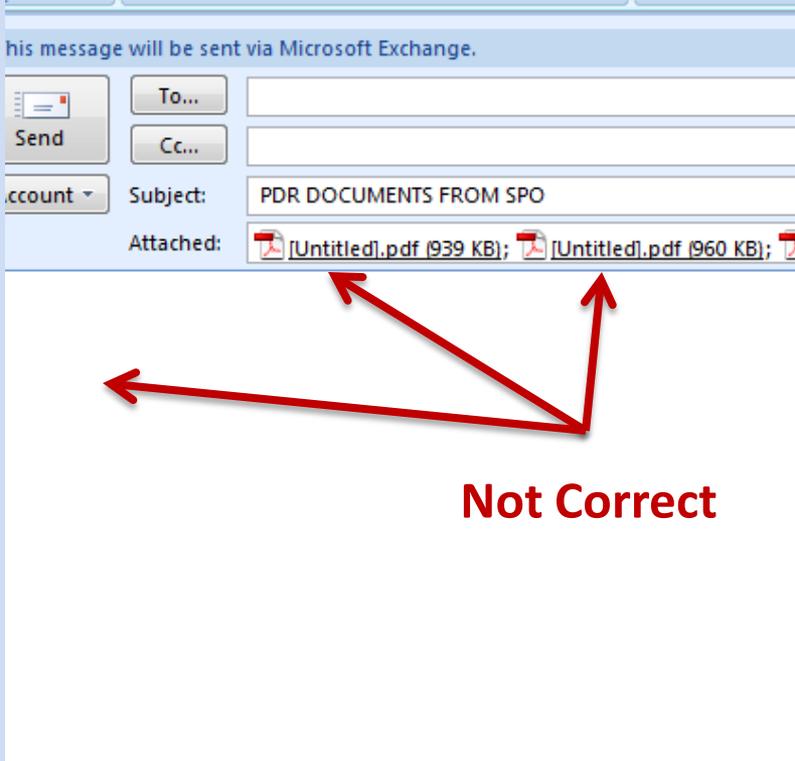
These common errors add to the backlog and result in additional processing time for SPOs and MR staff.



Poor Quality/Unauthorized Document



Documents/Email Labels



Incomplete Document

b. NAME (Last, First, Middle) HORNE, BRANDON C.	c. PAY GRADE LT	d. UNIT / COMMAND NAME SECTOR HOUSTON/GALVESTON
e. SIGNATURE	f. DATE SIGNED (YYYYMMDD)	g. UNIT / COMMAND ADDRESS (City, State, Zip Code) 9640 CLINTON DR. HOUSTON, TX 77029
E. CONFIRMATION OF ENLISTMENT OR REENLISTMENT		
15. IN THE ARMED FORCES EXCEPT THE NATIONAL GUARD (ARMY OR AIR): I, <u>JACOB LOUIS KIRK</u> , do solemnly swear (or affirm) that I will support and defend the Constitution of the United States against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; and that I will obey the orders of the President of the United States and the orders of the officers appointed over me, according to regulations and the Uniformed Code of Military Justice. So help me God.		
16. IN THE NATIONAL GUARD (ARMY OR AIR): I, _____, do solemnly swear (or affirm) that I will support and defend the Constitution of the United States and the State of _____ against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; and that I will obey the orders of the President of the United States and the Governor of _____ and the orders of the officers appointed over me, according to law and regulations. So help me God.		
17. IN THE NATIONAL GUARD (ARMY OR AIR): I do hereby acknowledge to have voluntarily enlisted/reenlisted this _____ day of _____ 20 _____ in the _____ National Guard and as a Reserve of the United States (list branch of service) _____ with membership in the _____ National Guard of the United States for a period of _____ years, _____ months, _____ days, under the conditions prescribed by law, unless sooner discharged by proper authority.		
18a. SIGNATURE OF ENLISTEE / REENLISTEE	b. DATE SIGNED 20110322	
19. ENLISTMENT / REENLISTMENT OFFICER CERTIFICATION		

Missing signatures or other information

Missing pages



Percent of Unauthorized Documents sent to Military Records Staff

33%

Tens of thousands of documents per year are reviewed and deleted because they are not authorized in the EI-PDR



Looking Forward

Efforts underway to enhance the EI-PDR

- More user-friendly access/view
- Member can view their own EI-PDR
- SPOs scan documents into EI-PDR
(MR retains deletion authority)

Note: Requirements, system and timeline TBD



Questions?

Also visit www.uscg.mil/psd/mr/

