U.S. Coast Guard
Reserve Activities User Guide

Prepared by
Commandant (CG-631)
U.S. Coast Guard
2703 Martin Luther King Jr. Ave SE
Washington, DC 20593

Table of Contents

1.0 Introduction 10
2.0 Annual Screening Questionnaire (ASQ) 11
2.1 ASQ – Self-Service 11
2.2 ASQ – SPO 15
3.0 Member Training Rating 16
3.1 Member Training Rating - Self-Service 16
3.2 Add Member Training Rating - SPO 17
3.3 Extending Training Rating 18
3.4 Remove Member's Training Rating 19
3.5 Training Status Report 20
4.0 Member Status Change 21
4.1 Reserve Member Classification 23
5.0 Montgomery GI Bill - Selected Reserve (MGIB-SR) 25
5.1 Self-Service MGIB 25
5.2 MGIB – SPO 26
5.2.1 Electing MGIB-SR Benefits 26
5.2.2 Terminating MGIB-SR Benefits 29
5.2.3 Suspending MGIB-SR Benefits 31
5.2.4 Reinstating/Restoring MGIB-SR Benefits 33
6.0 Inactive Duty Training (IDT) 35
6.1 Self-Service IDT 35
6.2 View My Request 37
6.3 Change a Current Drill Request 40
6.4 Withdraw a Submitted Drill Request 42
6.5 Administrative IDT Tasks 43
6.3.1 Schedule Drills 43
6.3.2 View Scheduled Drills 45
6.3.3 Changing Drill Statuses 46
6.3.4 Approving and Denying Drills 47
6.3.5 Cancelling Paid Drills 49
6.3.6 Approving Cancelled Paid Drills 50
6.6 View Member Drills Report 52
6.7 Reserve Drills 54
7.0 Retirement Points 55
7.1 Administrator View 55
7.2 Administrator Update 58
7.3 Self-Service 59
8.0 Reserve Orders 60
8.1 Summary 60
8.2 Member Self-Service 61
8.2.1 Submit an Order to Command for Recommendation 61
8.2.2 Review My Reserve Orders 65
8.3 Order Process for Command 66
8.3.1 Approve Recommendation Request for an Order 66

8.3.2 Submit Order for Authorization 69
8.4 Order Process for DXR 71
8.4.1 Authorize Order 71
8.5 Reserve Order Processes for SPO 74
8.5.1 Create an Order (Short Term) 74
8.5.2 Create an Order with Contingency 77
8.5.3 Create an EAD Order Using Member Form 80
8.5.4 Submit an Order to DXR for Authorization 82
8.5.5 Submit Travel details 84
8.5.6 Depart/Report Endorsements 85
8.5.7 Multiple Endorsements 87
8.5.8 SPO Supervisor Approving Request 89
8.5.9 Finish an Order 92
8.5.10 Amend an Order 93
8.5.11 Cancel an Order 94
8.5.12 Linking an Order 99
8.6 Common Order Processes 100
8.6.1 Find/Review an Order (Including Audit) 100
8.6.2 Entering Order Notes 106
8.6.3 Selling Leave 107
8.6.4 Order Compliance 108
8.6.5 Create/Submit Reserve Waiver 110
8.6.6 Add/Update Member Weigh-In Information 112
8.6.7 DD214 112
8.7 Order Setup and Configuration 113
8.7.1 Contingency Setup 113
8.7.2 Accounting Setup 117
8.7.3 Order Notes 123
8.8 Reserve Order Reports 125
8.8.1 Reserve Orders Extract Report 125
8.8.2 Reserve Orders with Invalid Accounting Report 126
8.8.3 Unfinished Reserve Orders 126
8.8.4 Amended Reserve Orders 127

Table of Figures

Figure 1: Annual Screening Questionnaire Link 11
Figure 2: Annual Screening Questionnaire Acknowledgement 11
Figure 3: First Responder Section 12
Figure 4: Reserve Recall Availability Section 12
Figure 5: Supervisor ID 13
Figure 6: Occupation Data Tab 13
Figure 7: Annual Screening Questionnaire Link 15
Figure 8: Email Notification 15
Figure 9: Member Training Rating Self-Service Link 16
Figure 10: Self Service Member Training Rating 16
Figure 11: Member Training Rating Link 17
Figure 12: Member Training Rating 17
Figure 13: Member Training Rating Search Page 18
Figure 14: Extending Member Training Rating 18
Figure 15: Member Training Rating Link 19
Figure 16: Member Training Rating Search Page 19
Figure 17: Delete Member Training Rating 19
Figure 18: Training Status Report 20
Figure 19: Training Status Report Results 20
Figure 20: Member Status Change 21
Figure 21: Reserve Member Status Change Search Page 21
Figure 22: Reserve Member Status Change 21
Figure 23: Reserve Member Classification 23
Figure 24: Reserve Member Status Search Page 23
Figure 25: Reserve Member Classification Tab 23
Figure 26: Task Link 25
Figure 27: My Member Info Link 25
Figure 28: Create Report Link 25
Figure 29: Member Info Report 25
Figure 30: MGIB Enrollments Link 26
Figure 31: Simple Benefit Search 26
Figure 32: MGIB-SR Simple Benefits 26
Figure 33: MGIB Enrollments Link 29
Figure 34: Simple Benefit Search 29
Figure 35: Simple Benefits Plan 29
Figure 36: Plan Type 30
Figure 37: MGIB Enrollments Link 31
Figure 38: Simple Benefit Search 31
Figure 39: Simple Benefits Plan 31
Figure 40: Plan Type 32
Figure 41: MGIB Enrollments Link 33
Figure 42: Simple Benefit Search 33
Figure 43: Simple Benefits Plan 33

Figure 44: Plan Type ... 34
Figure 45: IDT Link ... 35
Figure 46: IDT Action Request ... 35
Figure 47: View My Request (All Types) ... 37
Figure 48: View My Action Request ... 37
Figure 49: Self-Service View My Action Request ... 38
Figure 50: Update Drill Request ... 39
Figure 51: View My Request ... 40
Figure 52: Drill Changes ... 40
Figure 53: Updated AWE Status ... 41
Figure 54: View My Request ... 42
Figure 55: Withdraw Request ... 42
Figure 56: Terminated Drill Request ... 42
Figure 57: Reserve Drills ... 43
Figure 58: Drill Request Page ... 43
Figure 59: Reserve Drills ... 45
Figure 60: Reserve Drills ... 46
Figure 61: Send Notification ... 46
Figure 62: View My Request ... 47
Figure 63: Approve/Deny Request ... 47
Figure 64: Additional Request Information ... 48
Figure 65: Approved Request ... 48
Figure 66: Member Drills Page ... 49
Figure 67: View My Request ... 50
Figure 68: Approval Page ... 50
Figure 69: Approved Cancelled Paid Drills ... 51
Figure 70: View Member Drills Link ... 52
Figure 71: View Member Drills Report ... 52
Figure 72: View Member Drill Report Results ... 52
Figure 73: Reserve Member Balances Link ... 54
Figure 74: Reserve Member Balances Search Page ... 54
Figure 75: Reserve Drills Page ... 54
Figure 76: Reserve Member Balances ... 55
Figure 77: Reserve Member Balances Search Page ... 55
Figure 78: Toggle Views ... 55
Figure 79: Retirement Points ... 56
Figure 80: Reserve Member Balances ... 58
Figure 81: Reserve Member Balances Search Page ... 58
Figure 82: Self-Service Reserve Points Statement ... 59
Figure 83: Self-Service Reserve Points Statement ... 59
Figure 84: Order Status ... 60
Figure 85: Approval Flows ... 60
Figure 86: Self-Service Reserve Orders ... 61
Figure 87: Reserve Orders Link ... 61

Figure 88: Add New Reserve Order 62
Figure 89: Reserve Order Page 62
Figure 90: Saved Reserve Order 63
Figure 91: Route to Command 64
Figure 92: My Reserve Orders 65
Figure 93: Self-Service Member Orders Search 65
Figure 94: Member's Orders 65
Figure 95: Requests 66
Figure 96: View My Requests 66
Figure 97: Populate Grid 66
Figure 98: Transaction List 67
Figure 99: Approving Recommended Order 67
Figure 100: Approved Recommended Order 68
Figure 101: TONO Details 68
Figure 102: Reserve Orders 69
Figure 103: Reserve Orders Search Page 69
Figure 104: Saved Order 70
Figure 105: Route for Authorization ADT-AT 70
Figure 106: Requests 71
Figure 107: View My Requests 71
Figure 108: Populate Grid 71
Figure 109: Transaction List 72
Figure 110: Approving Recommended Order 72
Figure 111: Approved Recommended Order 73
Figure 112: TONO Details 73
Figure 113: Reserve Orders Link 74
Figure 114: Add a New Value 74
Figure 115: Reserve Orders Page 75
Figure 116: Saved Order 76
Figure 117: Reserve Orders Link 77
Figure 118: Add a New Value 77
Figure 119: ADOS-AC Reserve Order 78
Figure 120: Contingency 79
Figure 121: Saved Order 79
Figure 122: Member Form 80
Figure 123: Member Form Search Page 80
Figure 124: Make Assignment Link 81
Figure 125: Add Order 81
Figure 126: Reserve Orders Component 81
Figure 127: Reserve Orders 82
Figure 128: Reserve Orders Search Page 82
Figure 129: Saved Order 83
Figure 130: Route for Authorization ADT-AT 83
Figure 131: Travel Details 84

Figure 132: Order Depart ... 85
Figure 133: Depart Endorsement Approval ... 86
Figure 134: Multiple Endorsements Report to Duty ... 87
Figure 135: SEQ_NO 2 Approval ... 87
Figure 136: Multiple Endorsement Line 99 ... 88
Figure 137: Approval for SEQ_NO 99 ... 88
Figure 138: Requests ... 89
Figure 139: View My Requests ... 89
Figure 140: Populate Grid ... 89
Figure 141: Transaction List ... 90
Figure 142: Approving Recommended Order ... 90
Figure 143: Approved Recommended Order ... 91
Figure 144: Search Order to Amend ... 93
Figure 145: Amend Order ... 93
Figure 146: Cancel an Order ... 94
Figure 147: Cancelling an Order ... 94
Figure 148: Approve Cancellation ... 95
Figure 149: Cancelled Order ... 95
Figure 150: Cancel Order with TONO ... 96
Figure 151: Submit Order with TONO for Cancellation ... 96
Figure 152: Select Order Cancellation Approval ... 97
Figure 153: Approve Order Cancellation Request ... 97
Figure 154: Updated SWE Status ... 98
Figure 155: Cancelled Order with TONO ... 98
Figure 156: Link New Long Term Order ... 99
Figure 157: Reserve Order Tab ... 100
Figure 158: Basic Information ... 100
Figure 159: Contingency ... 101
Figure 160: Compliance ... 101
Figure 161: Waiver Tab ... 102
Figure 162: Travel Tab ... 102
Figure 163: Travel Details ... 103
Figure 164: Notes Tab ... 103
Figure 165: Funding Tab ... 104
Figure 166: Leave Tab ... 104
Figure 167: Approval Tab ... 105
Figure 168: Audit Tab ... 105
Figure 169: Order Notes Tab ... 106
Figure 170: Leave Tab ... 107
Figure 171: Compliance ... 108
Figure 172: Waiver Tab ... 109
Figure 173: Person Profile ... 110
Figure 174: Waiver Tab ... 110
Figure 175: Add New Waiver ... 111

Figure 176: Member Weigh-In Information 112
Figure 177: Contingency Setup 113
Figure 178: Add a New Value 113
Figure 179: Contingency Operations Setup 114
Figure 180: Modify Existing Contingency 115
Figure 181: Contingency Search Results 115
Figure 182: Contingency Changes 116
Figure 183: Accounting Setup 117
Figure 184: Program Element Budget 117
Figure 185: Add PE Budget 118
Figure 186: Search Existing Program Element Budget 118
Figure 187: PE Budget Edits 119
Figure 188: Department Accounting Search 119
Figure 189: Department Accounting Edit 120
Figure 190: Benefiting Dept 120
Figure 191: Add Funding Project Code 121
Figure 192: Save Project Code 121
Figure 193: Edit Existing Project Code 122
Figure 194: Existing Project Code Edit 122
Figure 195: Add New Order Note 123
Figure 196: New Order Note 123
Figure 197: Edit Existing Order Note 124
Figure 198: View All Order Notes 124
Figure 199: Reserve Orders Extract Report 125
Figure 200: Reserve Orders with Invalid Accounting 126
Figure 201: Unfinished Reserve Orders 126
Figure 202: Reserve Orders Amended 127

List of Tables

Table 1: Employee Classification 22
Table 2: Reserve Classification Values 24
Table 3: Election Benefit Plan Codes 28
Table 4: Simple Benefits Plan Fields 28
Table 5: Terminated MGIB-SR Codes 30
Table 6: Suspend MGIB-SR Codes 32
Table 7: Reinstate/Restore MGIB-SR Codes 34
Table 8: View My Action Request Field Descriptions 38
Table 9: Reserve Drills Field Descriptions 44
Table 10: Leave Fields 107

1.0 Introduction

This user guide contains essential information for Reserve personnel to fully utilize the reserve components in 9.1 Direct Access. Included are detailed descriptions of the system's functions and capabilities, step-by-step procedures for utilizing the system, screen shots of the step-by-step procedures and tables of field descriptions.

2.0 Annual Screening Questionnaire (ASQ)

2.1 ASQ – Self-Service

SELRES and IRR members are required by law to fill out the ASQ on an annual basis or as their information changes.

1. Access the Annual Screening Questionnaire by navigating to the following menu path from the portal homepage - Employee > Tasks > Annual Screening Questionnaire.

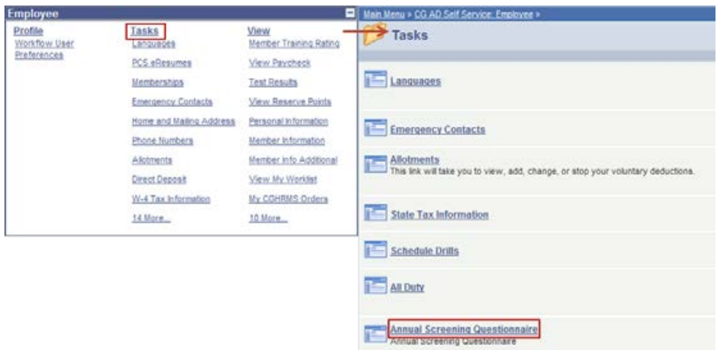


Figure 1: Annual Screening Questionnaire Link

2. Read the Annual Screening Questionnaire Acknowledgment section.

3. In the Member's Response section, select the radio button for one of the statements.

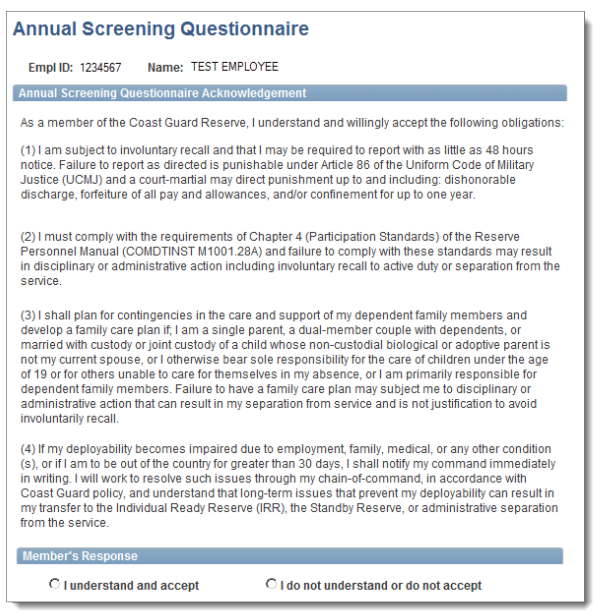


Figure 2: Annual Screening Questionnaire Acknowledgement

A response of 'I do not understand or do not accept' will require a supervisor's EmplID in the Reserve Recall Availability section for further consultation since selecting this response can lead to discharge from the Reserve or transfer to the IRR.

4. Click the First Responder Description link to read the description. Upon completion, select one of the two radio buttons.

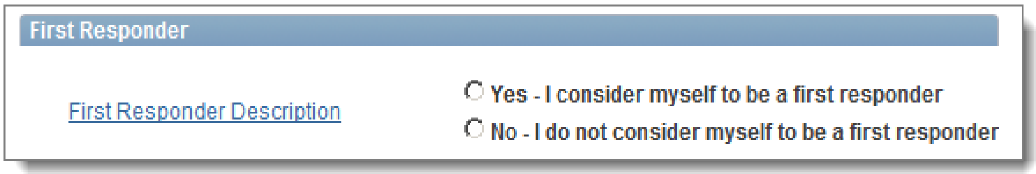


Figure 3: First Responder Section

5. In the Reserve Recall Availability section the Date Notified field will default to the current date.

6. The Date Signed field will default to the current date.

7. From the *Recall Status drop down, select one of the following selections – Available for Recall, Community of Family Hardship, Critical Civilian Occupation, Key Employee or Govt Official or Other.

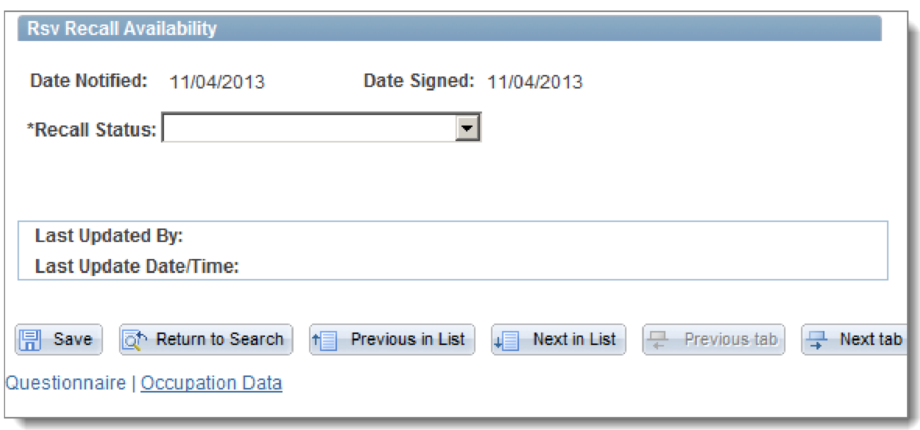


Figure 4: Reserve Recall Availability Section

Selecting a Recall Status of anything other than Available will require a supervisor's EmplID for further consultation since selecting this response can lead to discharge from the Reserve or transfer to the IRR.

8. To enter a Supervisor's EmplID, click the look up icon. If the EmplID is known, it can be entered directly. Entering an EmplID other than a supervisor will not allow the ASQ to be routed correctly.

9. Click the Occupation Data link to navigate to the next tab of the ASQ.

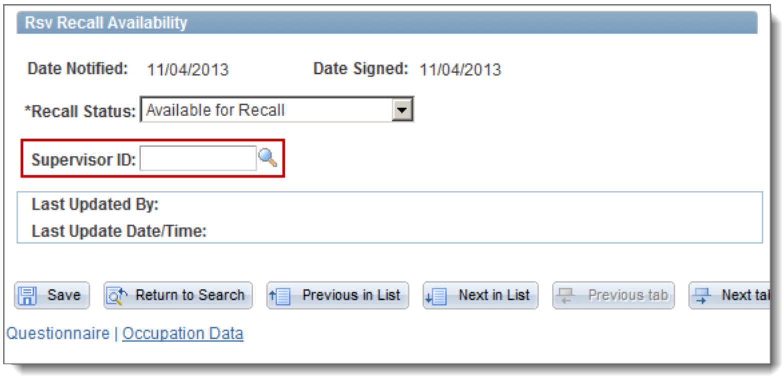


Figure 5: Supervisor ID

The Occupation Data tab captures all of the member's current job information. Fields marked with an * are required fields.

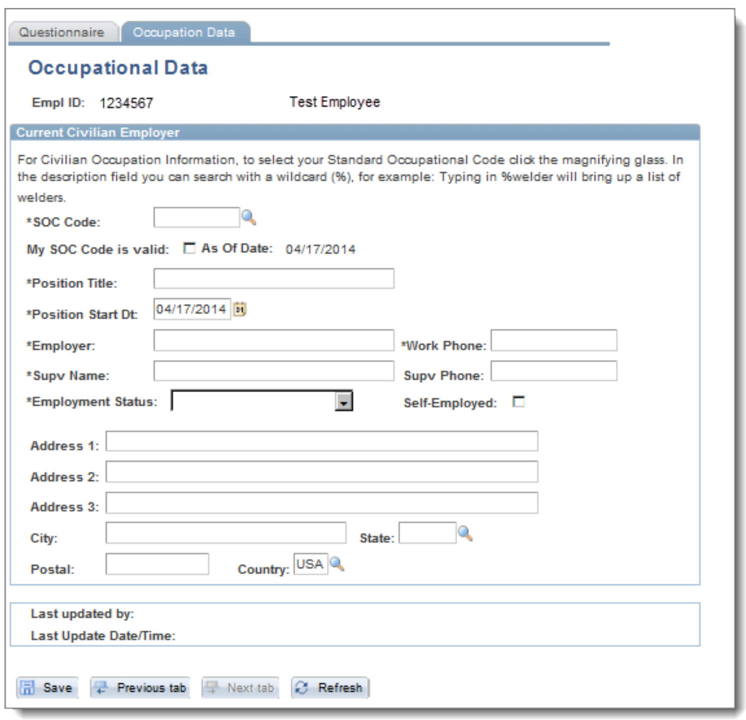


Figure 6: Occupation Data Tab

10. Enter the SOC Code by utilizing the look up tool.

Members that are unemployed or are students, SOC code 434061 should be utilized.

11. Enter the Position Title.

12. Enter the Position Start Date.

13. Enter the Employer.

14. Enter the Work Phone.

15. Enter the Supervisor's Name.

16. Select an Employment Status from the drop down.

17. Check the My SOC Code is Valid checkbox.

18. Click Save.

19. The Last updated by and Last updated Date/Time fields will display the name of the member who completed the ASQ and the date/time it was saved. This information is read only and is used for tracking purposes. The ASQ form will be saved up to a year from when the form was last saved, once a year has passed, the form will default to blank values.

2.2 ASQ – SPO

The SPO can access the Annual Screening Questionnaire by navigating to the following menu path from the portal homepage – Reserve Administration > Annual Screening Questionnaire.

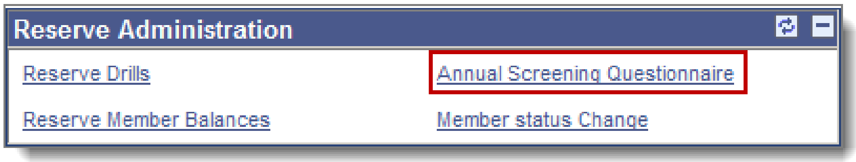


Figure 7: Annual Screening Questionnaire Link

1. Enter the member's EmplID for which the ASQ needs to be filled out for. Refer to section 2.1 Annual Screening Questionnaire and 2.1 Occupation Data Tab for instructions on how to fill out these two tabs.

2. When a member selects 'I do not understand or accept' or a recall status of anything other than 'Available' an email will be sent to their supervisor.

3. Upon accessing the member's ASQ via the link in the email notification, the member will then be counseled. Once the counseling has been completed the member will then return to the ASQ, make the necessary corrections and re-submit it.

The Supervisor must not make any changes to the member's ASQ. The member must update the ASQ after the SPO consultation.

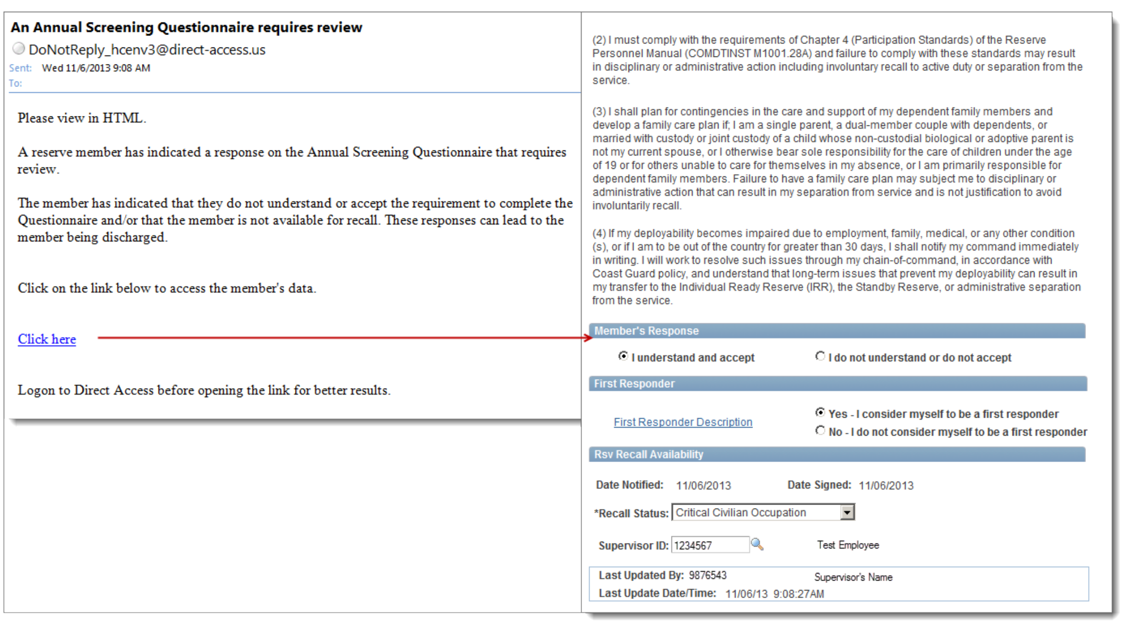


Figure 8: Email Notification

3.0 Member Training Rating

The Member Training Rating component allows SPO users to assign, extend or remove a reserve member's training rating. Self-Service reserve members can view current training ratings via the Self-Service link.

3.1 Member Training Rating - Self-Service

1. From the portal homepage, in the Employee pagelet click View > Member Training Rating.

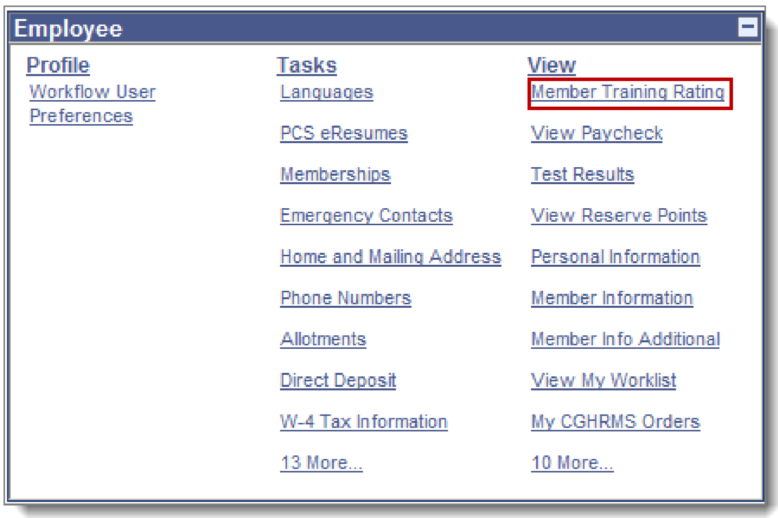


Figure 9: Member Training Rating Self-Service Link

2. The training rating page will display.

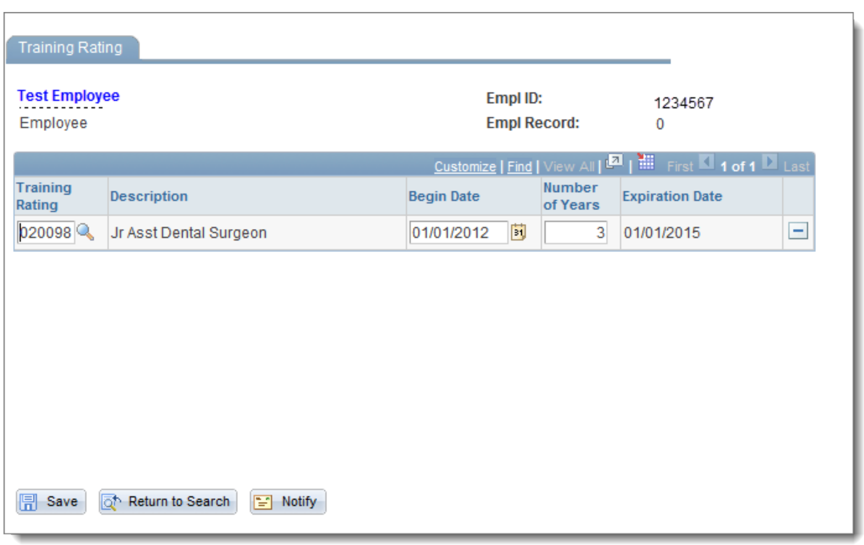


Figure 10: Self Service Member Training Rating

3.2 Add Member Training Rating - SPO

The Member Training Rating can be accessed by navigating to the following menu path from the portal homepage – Reserve Administration > Member Training Rating.

Figure 11: Member Training Rating Link

1. On the search page enter the member's EmplID and click Search.

2. Select the member from the search page to display the Training Rating page. To view the member's department, current rating and rank, mouse over the Member's name.

3. To add a new training rating, click on the lookup tool and select a training rating from the list. The Description will auto populate.

4. Enter the Begin Date using the calendar icon.

5. Enter the Number of Years and hit the tab key, this will auto populate the Expiration Date field.

6. Click Save.

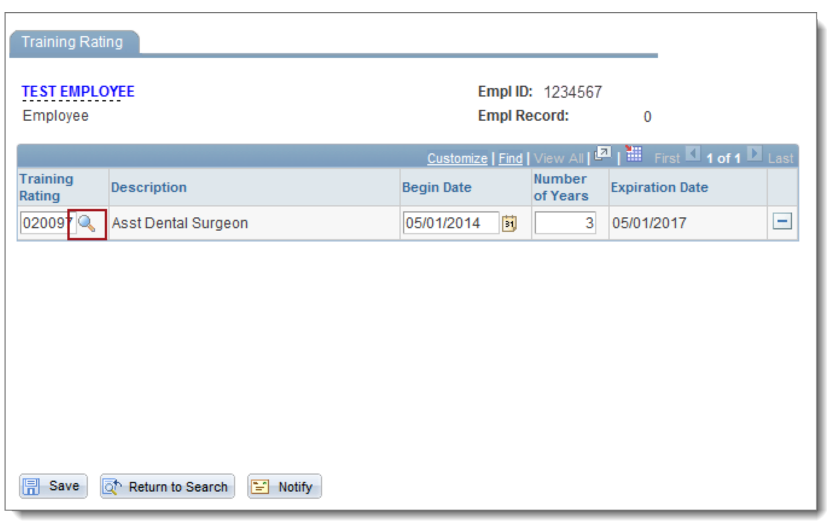


Figure 12: Member Training Rating

This page does not retain history of the training ratings.

3.3 Extending Training Rating

1. Access the Member Training Rating page by navigating to the following menu path from the portal homepage – Reserve Administration > Member Training Rating.

2. Search for the member's EmplID and select the member from the search results to display the Training Rating page.

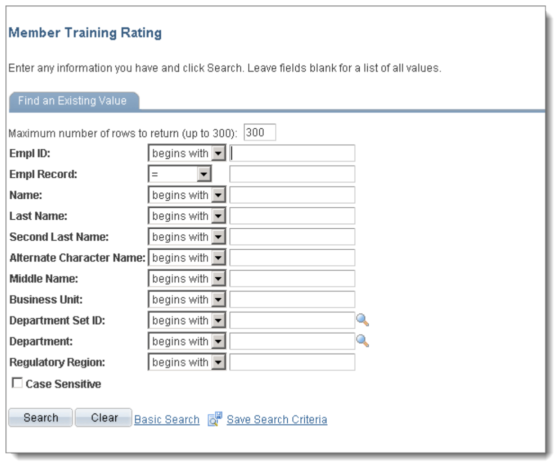


Figure 13: Member Training Rating Search Page

3. Existing training rating may only be extended for one year. Enter 1 in the number of Years field then press the tab key to update expiration date.

4. Click Save.

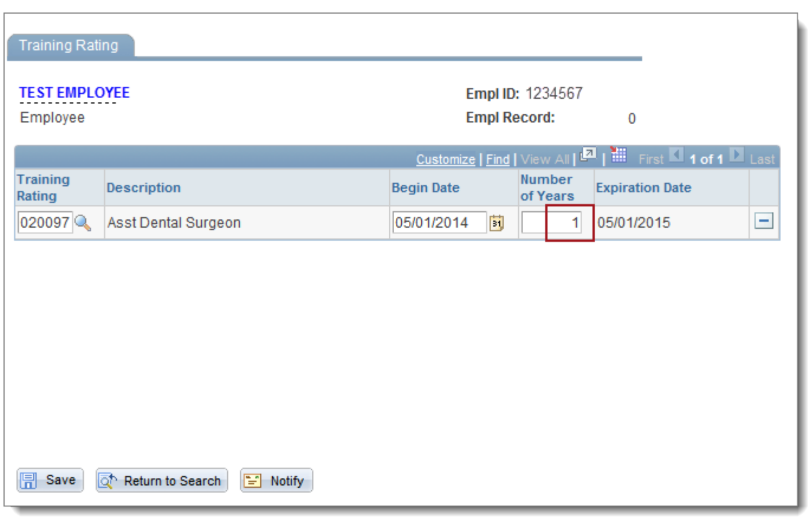


Figure 14: Extending Member Training Rating

3.4 Remove Member's Training Rating

When a member has completed the training rating requirements the supervisor will then delete the training rating. Navigate to the Member Training Rating via the portal homepage – Reserve Administration > Member Training Rating.

Figure 15: Member Training Rating Link

1. Enter the search criteria for the member whose training rating needs to be changed.

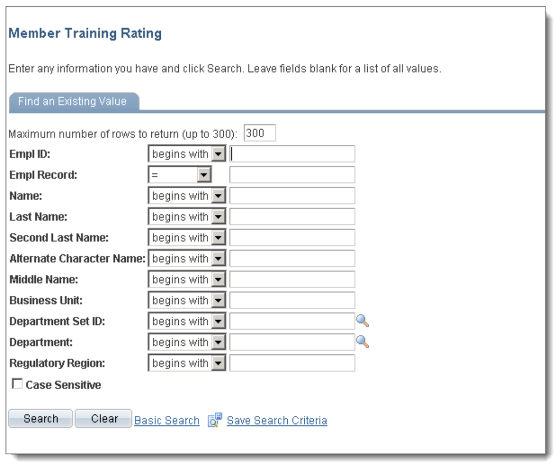


Figure 16: Member Training Rating Search Page

2. On the 'Member Training Rating' page, click on the '-' to delete a training rating and click 'Save'.

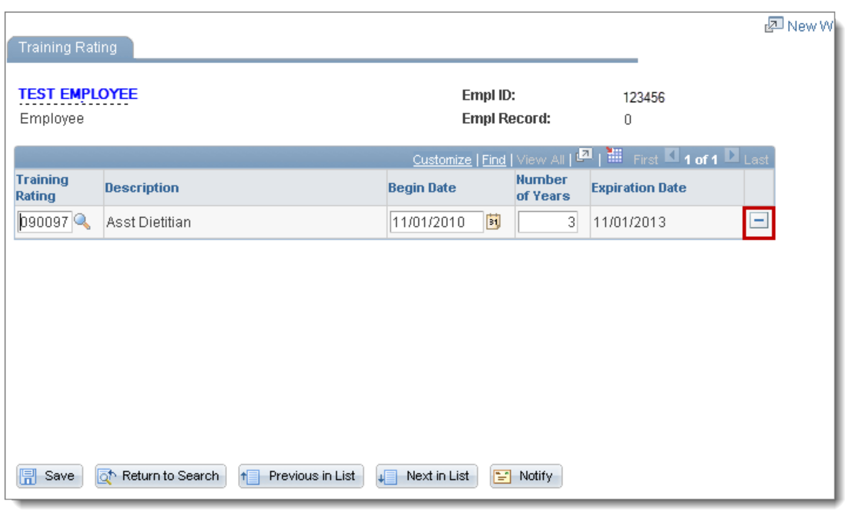


Figure 17: Delete Member Training Rating

3.5 Training Status Report

1. To run the Training Status report, from the portal homepage click the Training Status link in the Reserve Administration section.

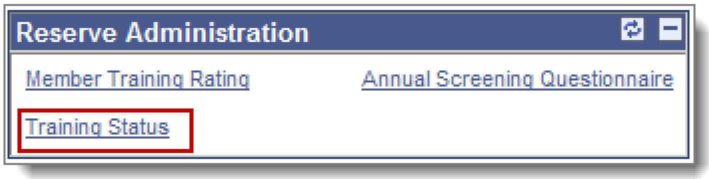
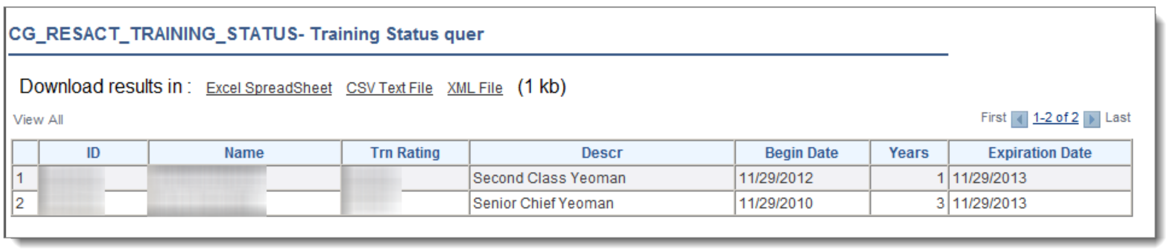


Figure 18: Training Status Report

2. The report will display a list of members whose training rating will be expiring within 30 days from the current date.


CG_RESACT_TRAINING_STATUS- Training Status quer

Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)

View All First 1-2 of 2 Last

	ID	Name	Trn Rating	Descr	Begin Date	Years	Expiration Date
1	[illegible]	[illegible]	[illegible]	Second Class Yeoman	11/29/2012	1	11/29/2013
2	[illegible]	[illegible]	[illegible]	Senior Chief Yeoman	11/29/2010	3	11/29/2013

Figure 19: Training Status Report Results

4.0 Member Status Change

The Member Status Change can be accessed by navigating to the following menu path from the portal homepage in the Reserve Administration pagelet.

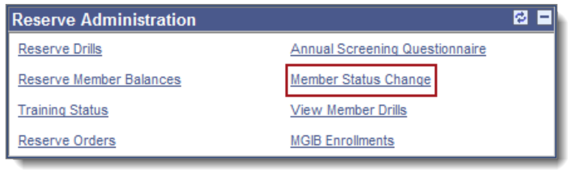


Figure 20: Member Status Change

1. On the search page enter the search criteria for the member.

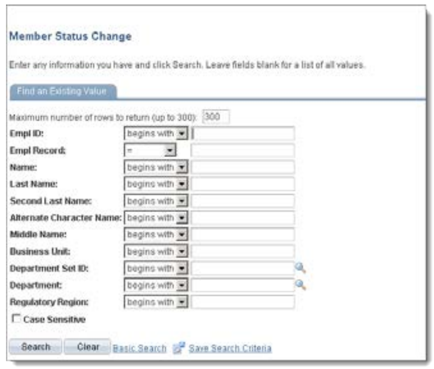


Figure 21: Reserve Member Status Change Search Page

2. Select the member from the search results.

3. The Member Status Change page displays the member's current status and effective date. To change the status, enter the new Effective Date using the calendar icon.

4. Enter the Employee Category and the TRAPAY CAT using the lookup tool.

5. Once all of the information has been entered, click Save.

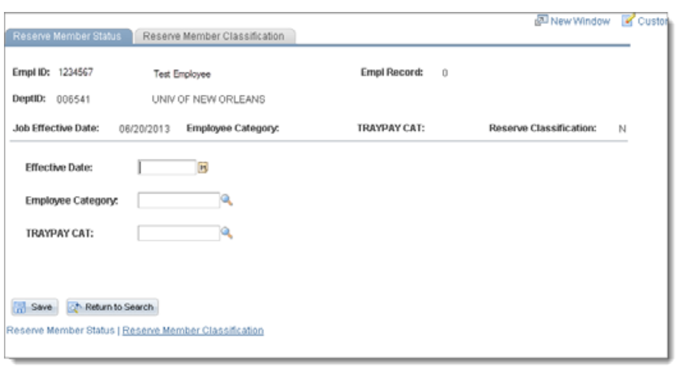


Figure 22: Reserve Member Status Change

The table below displays a description of the fields on the Reserve Member Status Change page.

Employee Classification	**TRAPAY CAT**
Selected Reserve (SELRES) (including members being ordered to long-term active duty)	A, B, C, D, F, M
Individual Ready Reserve (IRR) (Includes IRR members who regularly drill for no pay Assigned to drilling Dept)	E, H, J, P
Active Standby Reserve (ASL)	G, N
Inactive Standby Reserve (ISL)	I

Table 1: Employee Classification

4.1 Reserve Member Classification

The Reserve Member Classification can be accessed by navigating to the following menu path from the portal homepage in the Reserve Administration pagelet.

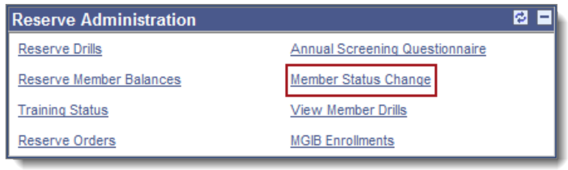


Figure 23: Reserve Member Classification

1. Search and select the member for who the Reserve Member Classification has to be changed.

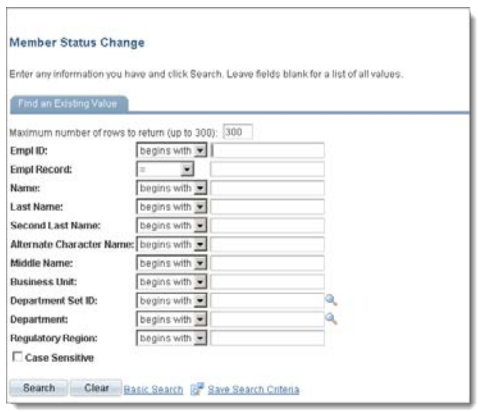


Figure 24: Reserve Member Status Search Page

2. Click on Reserve Member Classification tab.

3. Click the look up tool and select the new value.

4. Select the date using the calendar tool.

5. Click Save.

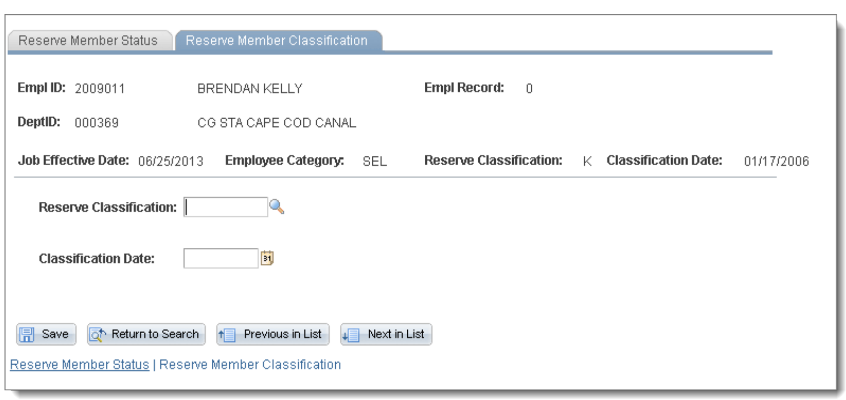


Figure 25: Reserve Member Classification Tab

The table below lists a description of the Reserve Classification values.

Military Service	**Service Component**	**Description**	**Short Description**
CGRSV	A	Enl non-prior svc REBI/A Sch	NonPrsREBI
CGRSV	I	Rsv Officer not on EAD w/in 8 yr obl	Rsvoff8obl
CGRSV	J	Prior Svc CG Enl w/in 8 yr obl	Prisvc8obl
CGRSV	K	Enl Stdnt w/split IADT	EnlStnIADT
CGRSV	N	w/svc oblig not in another Cla	w/SvcOblig
CGRSV	P	Enl Rgrd Attnd Rcrt Trng A Sch	EnlRgAttnd
CGRSV	Q	Mbr w/o a statutory obligation	NoStatObl
CGRSV	X	Enl non-prior svc direct PO	EnlDirctPO

Table 2: Reserve Classification Values

5.0 Montgomery GI Bill - Selected Reserve (MGIB-SR)

5.1 Self-Service MGIB

Self-service members can view their MGIB status on their Member Info Report.

1. To access the Member Info Report click on the Task link in the Employee pagelet from the portal homepage.

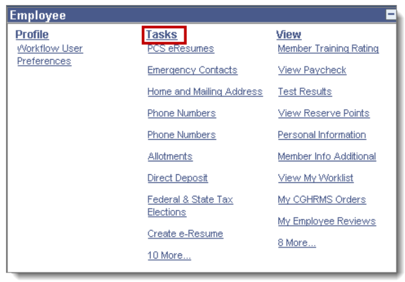


Figure 26: Task Link

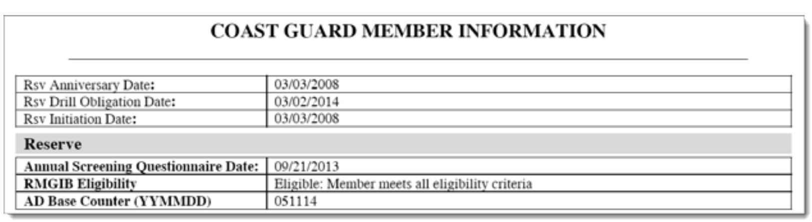
2. Click on My Member Info.

Figure 27: My Member Info Link

3. Click Create Report.

Figure 28: Create Report Link

4. The MGIB-SR status will be displayed in the Reserve section of the report.



COAST GUARD MEMBER INFORMATION

Rsv Anniversary Date:	03/03/2008
Rsv Drill Obligation Date:	03/02/2014
Rsv Initiation Date:	03/03/2008
Reserve	
Annual Screening Questionnaire Date:	09/21/2013
RMGIB Eligibility	Eligible: Member meets all eligibility criteria
AD Base Counter (YYMMDD)	051114

Figure 29: Member Info Report

5.2 MGIB – SPO

5.2.1 Electing MGIB-SR Benefits

The Simple Benefits page is used to elect MGIB-SR benefits for members.

1. To make elections for MGIB-SR, click on the MGIB Enrollment link in the Reserve Administration pagelet from the portal homepage.

Figure 30: MGIB Enrollments Link

2. Enter the search criteria to look up the member and select the member from the search results.

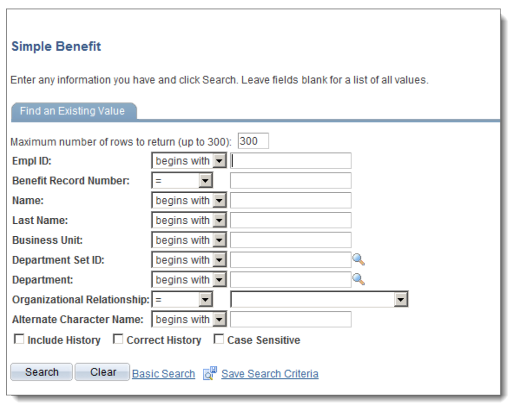


Figure 31: Simple Benefit Search

3. The Simple Benefits page will display for the member.

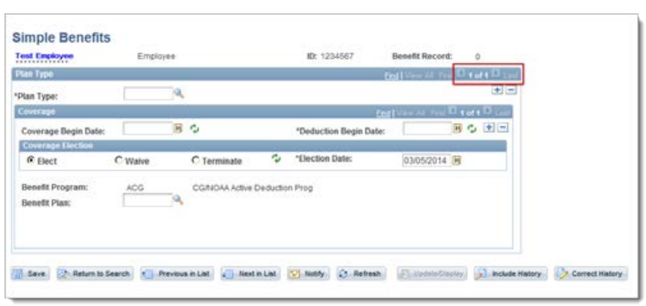


Figure 32: MGIB-SR Simple Benefits

4. If there is no current election for the member, the Plan Type record will display 1 of 1 and the fields on the record will be blank (Figure 28). The Election Date field will default to the current date.

5. If there is a current Plan for the member, the fields will be filled out. Click on ⊞ to insert a new row.

   Users must not click the ⊟ button. Doing so will permanently delete the row which cannot be restored. Permanently deleting rows directly impacts records being sent to DMDC and VA.

6. Select the Plan Type for MGIB-SR. The plan type for MGIB-SR will always be A4.

7. The Coverage Begin Date, Deduction Date and Election Date will all be the same date. Enter the date the member's MGIB-SR eligibility is effective. The system cannot have multiple rows with the same effective date.

8. Select 'Elect' from the 'Coverage Elections' section.

9. The 'Benefit Program' is automatically populated.

10. Click the lookup tool to select the best code which describes the member's eligibility. For most elections, BA will most likely be the appropriate code.

11. Click Save.

The table below lists all of the Eligibility Codes and a description of code.

Eligibility Code	Eligibility Code Description
AA	Ineligible: Has not executed a 6 yr obligation after 30-JUN-85.
AB	Ineligible: Has not completed IADT.
AC	Ineligible: No high school diploma or equivalent.
AD	Eligibility Terminated: Correction of erroneous report of eligibility.
BA	Eligible: Meets all eligibility criteria.
BB	Eligible: Member serving subsequent qualifying period of eligibility.
BC	Eligibility Conditnl Retained: Non qualify position/unit involuntary removal from qualify positn.
BD	Eligibility Retained: Serving position/unit completion of oblig for initial benefit eligibility.
BE	Eligible: Member separated because of disability.
BF	Eligible: Member separated because of inactivation or reduction.
CA	Ineligible: Member has completed course of instruction required for BA or equivalent.
CB	Eligibility Suspended: Granted period of authorization non-availability- all other-not to exceed 3 yrs.
CC	Eligibility Suspended: Granted period of authorized non-availability-missionary up to 3years.
CD	Eligibility Suspended: Being processed for unsatisfactory participation.
CE	Eligibility Suspended: Voluntarily depart from a qualifying position.
CF	Ineligible: Member on long-term orders.
CG	Eligibility Terminated: In receipt of ROTC scholarship.
DA	Eligibility Terminated: Member failed to reaffiliate within the required time

Eligibility Code	Eligibility Code Description
	limit.
DB	Eligibility Terminated: Member discharged without be granted a period of non-availability.
DC	Eligibility Terminated: Member deceased.
DD	Eligibility Terminated: Member determined to be unsatisfactory participant.
DE	Eligibility Terminated: Has failed to participate satisfactory prior to completing required service.

Table 3: Election Benefit Plan Codes

The table below lists the fields on the Simple Benefits page along with a description of what data each field requires.

Field Name	Field Description
Employee	This displays the name of the member.
ID	This displays the EmplID of the member.
Benefit Record	This field will display the Empl Record.
Plan Type	This section displays the plan type that is currently elected or can be elected.
Plan Type	This is used to select the type of plan using the lookup tool.
Coverage	This displays the type of coverage the member has or will be elected for.
Coverage Begin Date	This is the date the member is eligible for MGIB-SR.
Deduction Begin Date	This is the effective date for the plan/coverage being selected.
Coverage Election	This section displays what type of coverage the member has or will be elected for along with the date it is effective.
Elect	This is selected when members are being elected for coverage.
Waive	This button will not be used.
Terminate	Selecting this radio button will permanently delete the MGIB record. This button will not be used.
Election Date	This the date the coverage/plan is selected.
Benefit Program	This is derived from the member's Job Data.
Benefit Plan	This is the plan that the member is currently elected for or will be elected for.
Save	This Saves the updates made to the plan.
Return to Search	This will return to the search page.
Previous In List	This will display the member previous member in the list of search results.
Next in List	This will display the next member in the list of search results.
Notify	This allows the user to send a link to the Simple Benefit page via email.
Refresh	This refreshes the page.
Update/Display	This will update the page to include any changes that have been made.
Include History	This will include the history for the member.
Correct History	This will allow the user to update the member's benefits.

Table 4: Simple Benefits Plan Fields

5.2.2 Terminating MGIB-SR Benefits

1. To terminate MGIB-SR elections for a member, click on the MGIB Enrollment link in the Reserve Administration pagelet from the portal homepage.

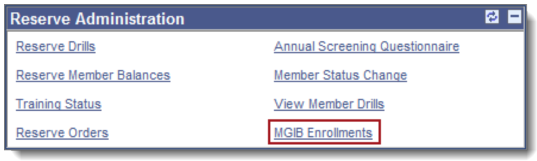


Figure 33: MGIB Enrollments Link

2. Enter the search criteria to look up the member. Select the member from the search results.

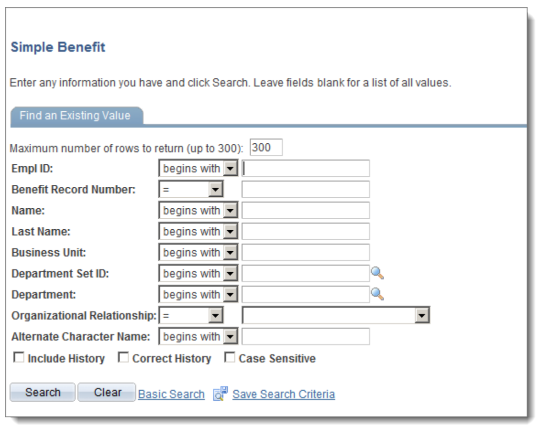


Figure 34: Simple Benefit Search

3. The Simple Benefits plan page will display for the member.

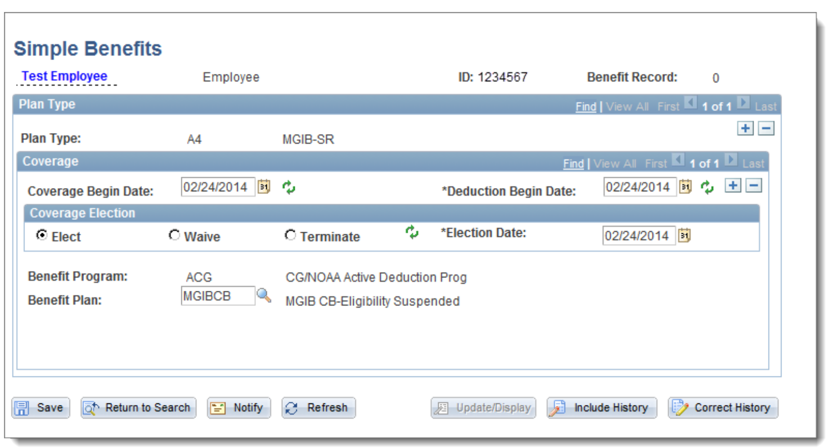


Figure 35: Simple Benefits Plan

4. Click the Correct History button on the bottom of the page.

5. Prior to inserting a new row, validate that the Plan Type row is A4 since that is the plan type of the record being terminated. A new Plan Type row will not be inserted.

6. In the Coverage heading click to insert a new row.

Users must not click the click this button. Doing so will permanently delete the row and cannot be restored. Permanently deleting rows will directly impact records being sent to DMDC and VA.

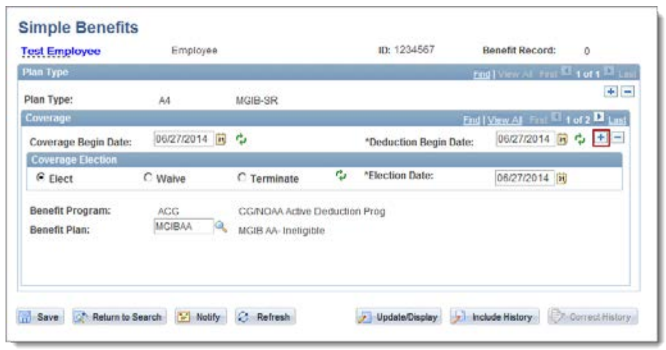


Figure 36: Plan Type

7. The Coverage Begin Date, Deduction Date and Election Date will all be the same date. Enter the date that the eligibility change is effective.

   The date being entered in these fields is required to fit the following criteria:

   - This date cannot be prior to when the member initially became eligible for MGIB-SR.

8. Rows with duplicate effective dated rows are not allowed.

9. Select the Elect radio button. Selecting Terminate will delete the record permanently.

10. Select the Benefit Plan using the lookup tool.

Eligibility Code	Eligibility Code Description
DA	Eligibility Terminated: Member failed to reaffiliate within the required time limit.
DB	Eligibility Terminated: Member discharged without being granted a period of unavailability.
DC	Eligibility Terminated: Member Deceased
DD	Eligibility Terminated: Member determined to be an unsatisfactory participant.
DE	Eligibility Terminated: Has failed to participate satisfactory prior to completing required service.

Table 5: Terminated MGIB-SR Codes

11. Click Save.

5.2.3 Suspending MGIB-SR Benefits

1. To suspend MGIB-SR elections for a member, click on the MGIB Enrollment link in the Reserve Administration pagelet from the portal homepage.

Figure 37: MGIB Enrollments Link

2. Enter the search criteria to look up the member. Select the member from the search results.

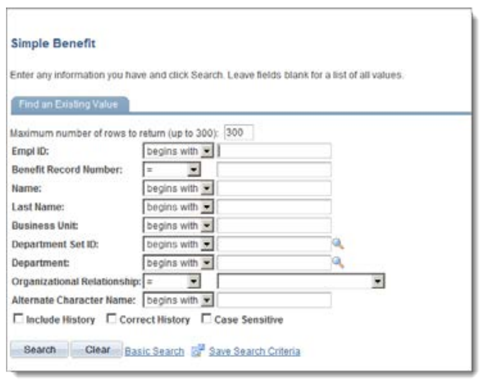


Figure 38: Simple Benefit Search

3. The Simple Benefits plan page will display for the member.

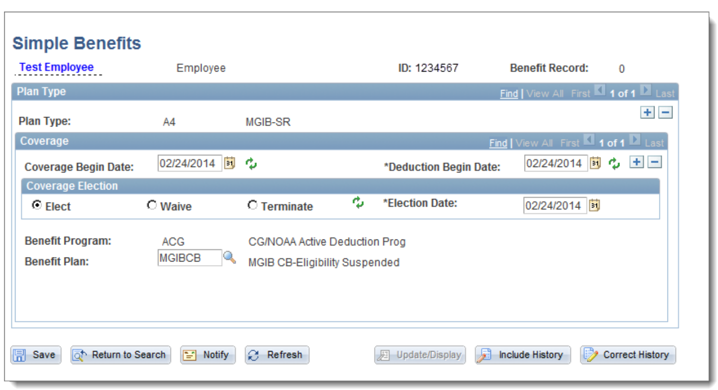


Figure 39: Simple Benefits Plan

4. Click the Correct History button on the bottom of the page.

5. Prior to inserting a new row, validate that the Plan Type row is A4 since that is the plan type of the record being suspended. In the Coverage heading click on to insert a new row.

Users must not click . Doing so will permanently delete the row and cannot be restored. Permanently deleting rows directly impacts records being sent to DMDC and VA.

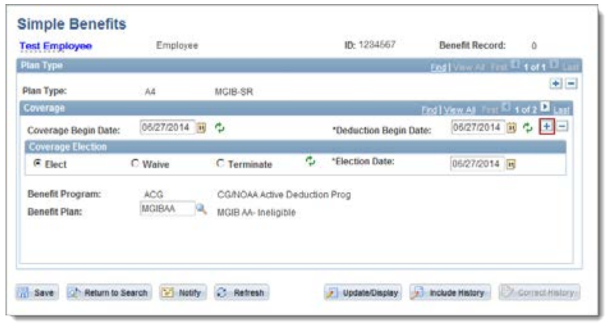


Figure 40: Plan Type

6. The Coverage Begin Date, Deduction Date and Election Date will all be the same date. Enter the date the member's eligibility is suspended.

   The date being entered in these fields is required to fit the following criteria:

   - This date cannot be prior to when the member established eligibility.

7. Duplicate effective dated rows are not allowed.

8. Select the Elect radio button. Selecting the Terminate button will permanently delete the record.

9. Select the Benefit Plan using the lookup tool.

10. Click Save.

Eligibility Code	Eligibility Code Description
CA*	Ineligible: Member has completed course of instruction required for BA or equivalent.
CB	Eligibility Suspended: Granted period of authorized non-availability-all other not-to-exceed-3yrs.
CC	Eligibility Suspended: Granted period of authorized non-availability-missionary-up to 3 yrs.
CD	Eligibility Suspended: Being processed for unsatisfactory participation.
CE	Eligibility Suspended: Voluntarily depart from a qualifying position.
CF	Ineligible: Member on long-term orders.
CG	Eligibility Terminated: In receipt of ROTC Scholarship.

Table 6: Suspend MGIB-SR Codes

Eligibility CA code is not used.

5.2.4 Reinstating/Restoring MGIB-SR Benefits

1. To reinstate/restore MGIB-SR elections for a member, click on the MGIB Enrollment link in the Reserve Administration pagelet from the portal homepage.

Figure 41: MGIB Enrollments Link

2. Enter the search criteria to look up the member. Select the member from the search results.

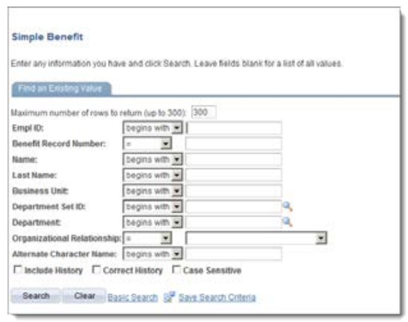


Figure 42: Simple Benefit Search

3. The Simple Benefits plan page will display for the member.

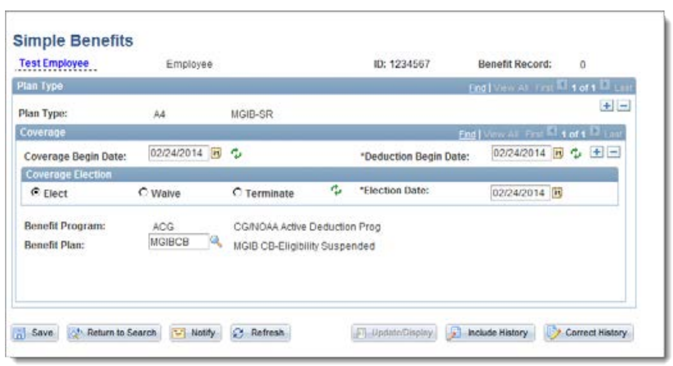


Figure 43: Simple Benefits Plan

4. Click the Correct History button on the bottom of the page.

Prior to inserting a new row, validate that the Plan Type row is A4 since that is the plan type of the record being reinstated. In the Coverage heading click [+] to insert a new row.

Users must not click the [–] button. Doing so will permanently delete the row and cannot be restored. Permanently deleting rows will directly impact records being sent to DMDC and VA.

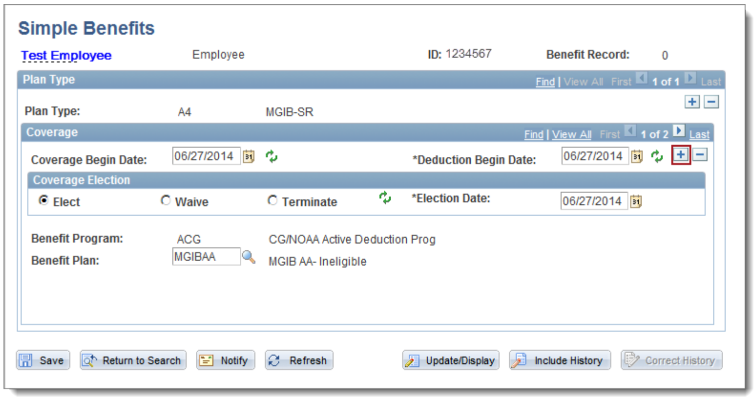


Figure 44: Plan Type

5. Select the Plan Type for MGIB-SR. The plan type for MGIB-SR will always be A4.

6. The Coverage Begin Date, Deduction Date and Election Date will all be the same date. Enter the date the member's eligibility is reinstated.

   The date being entered in these fields is required to fit the following criteria:

   - This date cannot be prior to when the member's eligibility was suspended.

7. Duplicate effective dated rows are not allowed.

8. Select the Elect radio button.

9. Select the Benefit Plan using the lookup tool.

10. Click Save.

Eligibility Code	Eligibility Code Description
BA	Eligible: Member meets all eligibility criteria.
BB	Eligible: Member serving subsequent qualifying period of eligibility.
BC	Eligibility Conditional Retained: Non-qualifying position/unit involuntary removal from qualifying position.
BD	Eligibility Retained: Serving position/unit completion of oblig for initial benefit eligibility.
BE	Eligible: Member separated because of disability.
BF	Eligible: Member separated because of inactivation or reduction.

Table 7: Reinstate/Restore MGIB-SR Codes

6.0 Inactive Duty Training (IDT)

The IDT component allows members to submit drill requests.

6.1 Self-Service IDT

1. For Self-Service members to schedule IDT from the portal homepage click on the Request link, then click Submit a Drill Request.

Figure 45: IDT Link

2. The IDT Action Request page will display.

Figure 46: IDT Action Request

3. Select Drill Date.

4. Enter Start/End Time for the drill in the format HH24:MI/HH24:MI (e.g. For a drill starting at 08:15am and ending at 04:45pm, enter 08:15/16:45).

5. Select the Drill Type from the drop down list.

6. Select Meal Eligibility for IDT-Multiple, ATP-Multiple or IDT-Single + ATP-Single Drill Types only. Leave blank for all other drill types.

7. Enter Department only if the drill is to be performed at another department.

8. Select Duty Purpose 1 for all Drill Types.

9. Select Duty Purpose 2 for IDT-Multiple, ATP-Multiple or IDT-Single + ATP-Single Drill Types only.

10. Select the Pay Code: No-Pay for Points only drills; Half' for 1 days pay; Full for 2 days pay.

11. Click 'Get Details' button to request information on Paid IDT Cap and # of Completed Drills

12. Look up and select Approver; enter any Comments and click Submit.

6.2 View My Request

1. To view the status of drill request, from the portal homepage click Request then click View My Request.

Figure 47: View My Request (All Types)

2. This will display the View My Action Request page. On this page members can use the radio buttons and drop downs to filter which request to display.

Figure 48: View My Action Request

The table below provides a description of the fields and buttons on the 'View My Action Request' page.

Field Name	Description
My Submitted Request	This will display the Request that were submitted by the member.
Request I am Approver For	This will display the request that the member is an approver for.
All Request	This will display all request.
Transaction Name	This is the name of the transaction that the user wants to display.
Transaction Status	This is the status of the transaction that the user wants to display.
Submission From Date	This is the date that the request was submitted from.
Submission To Date	This is the date that the request was submitted till.
Refresh	This button clears the grid and defaults it back to 'My Submitted Request'.
Populate Grid	Populates the grid based on radio button selections. (Transaction Name, Transaction Status, Submission To Dates

Table 8: View My Action Request Field Descriptions

3. Select My Submitted Request.

4. From the Transaction Name select Schedule Drills.

5. From the Transaction Status select Pending.

6. Enter the Submission From Date.

7. Enter the Submission End Date.

8. Click Populate Grid to display the results.

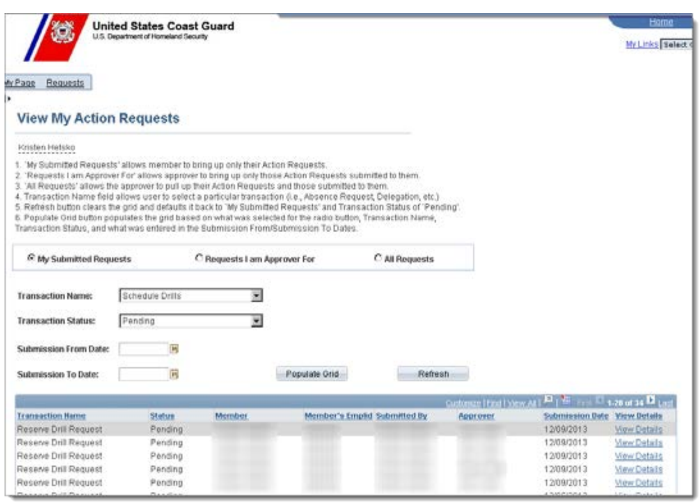


Figure 49: Self-Service View My Action Request

9. Click on View Details of the request. This will display the details of the request in a new window. The member can Cancel the request or make any changes to the request and click Resubmit. Enter any necessary details in the Comment box when making changes.

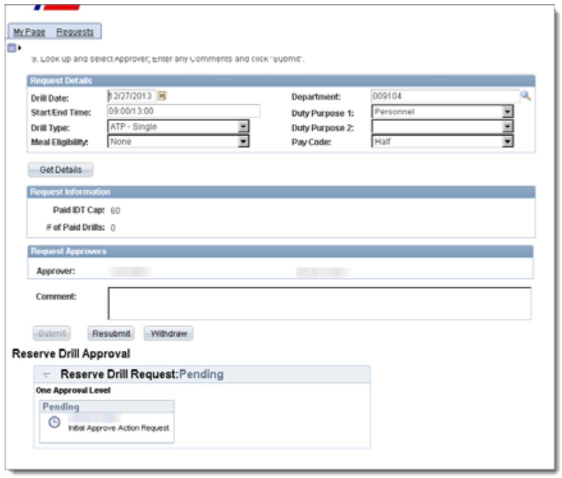


Figure 50: Update Drill Request

10. Close the window once the changes have been made. Clicking Refresh will clear the grid and default to Transaction Name of All Transactions and a Transaction Status of Pending.

Members that have been denied a drill request will receive an email notification.

6.3 Change a Current Drill Request

Changes can be made to a drill request that has already been submitted.

1. From the View My Request page, select the drill that requires the change.

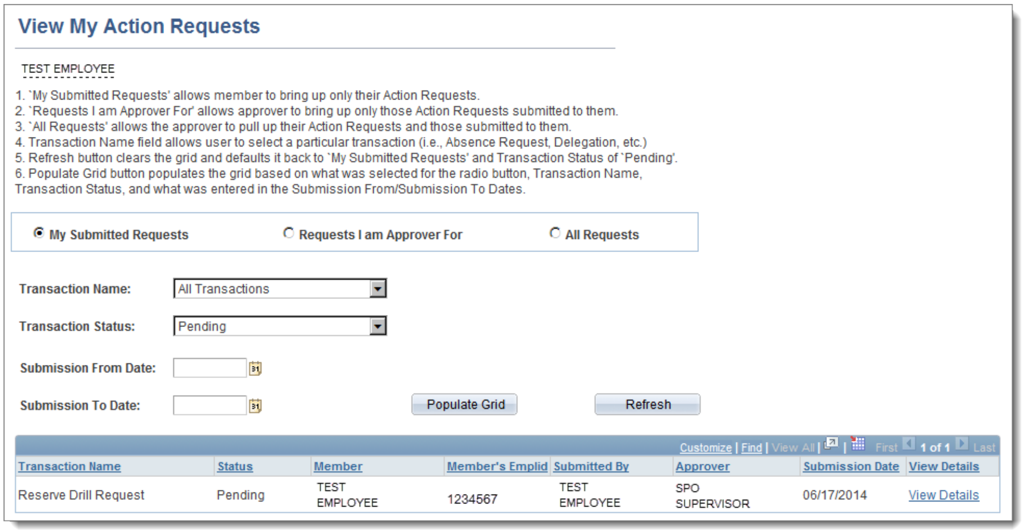


Figure 51: View My Request

2. Make the necessary changes and enter comments.

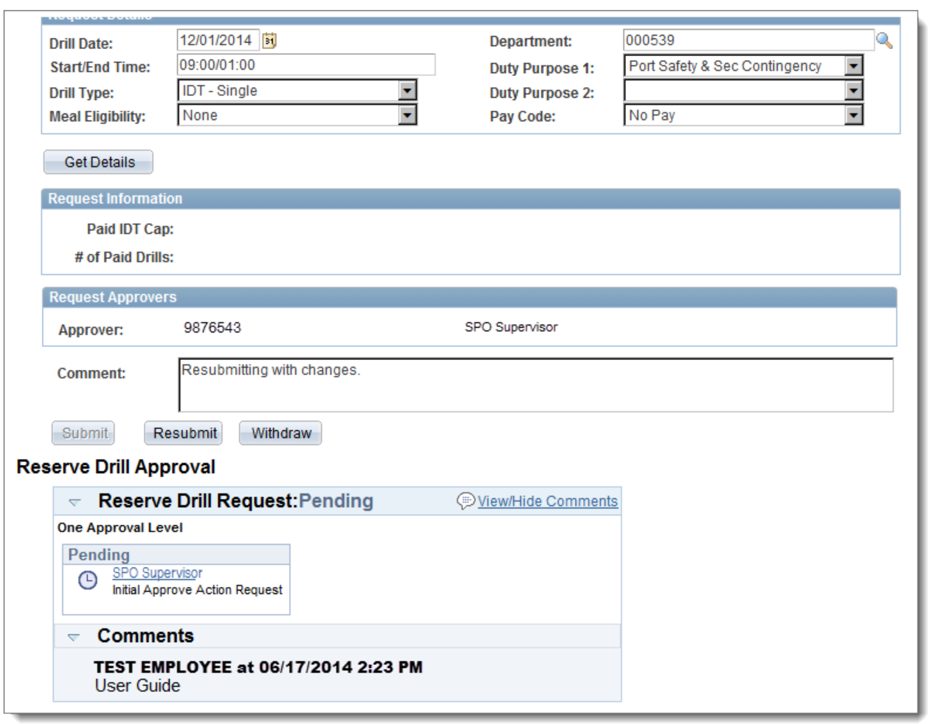


Figure 52: Drill Changes

3. Click Resubmit. The AWE will update displaying the new status of the drill request.

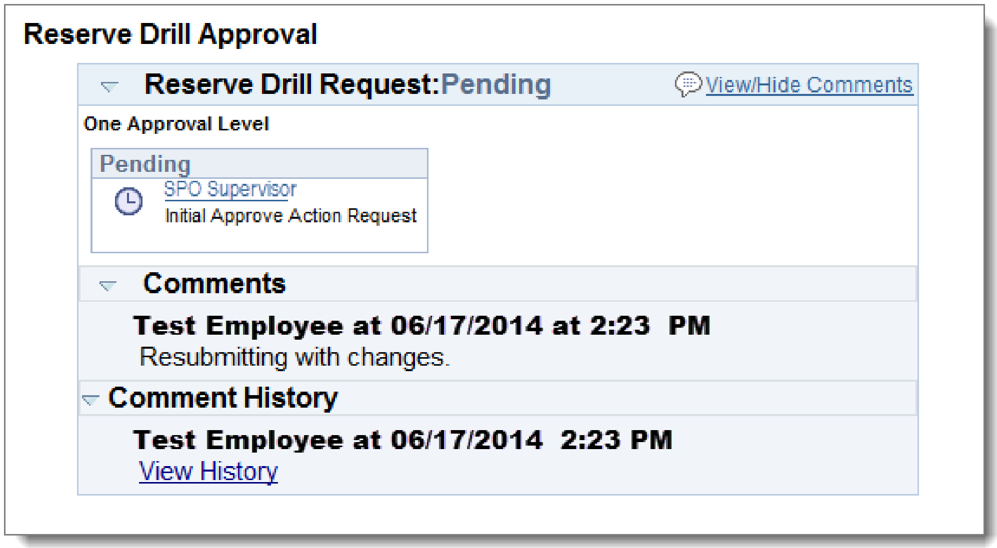


Figure 53: Updated AWE Status

6.4 Withdraw a Submitted Drill Request

If a member schedules a drill and needs to cancel the drill for any reason, the member must withdraw the drill request in order to cancel it.

1. From the My Request page select the drill that is to be cancelled.

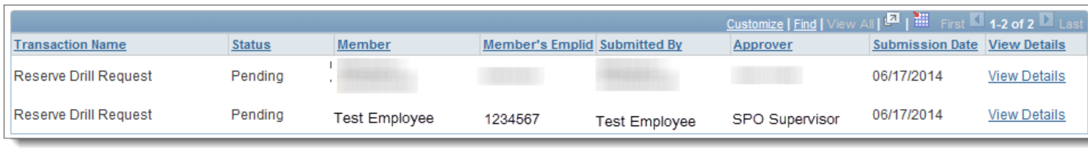


Figure 54: View My Request

2. Enter any comments and click Withdraw.

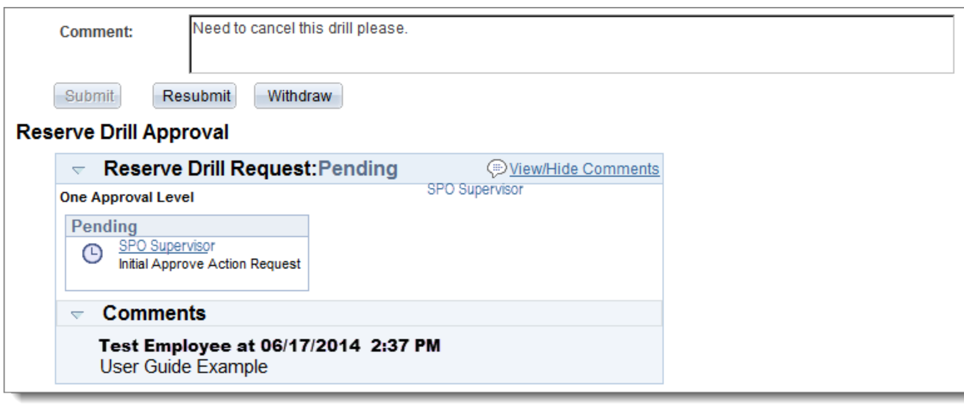


Figure 55: Withdraw Request

3. Exit the page and return to the drill request, the AWE will now show as terminated.

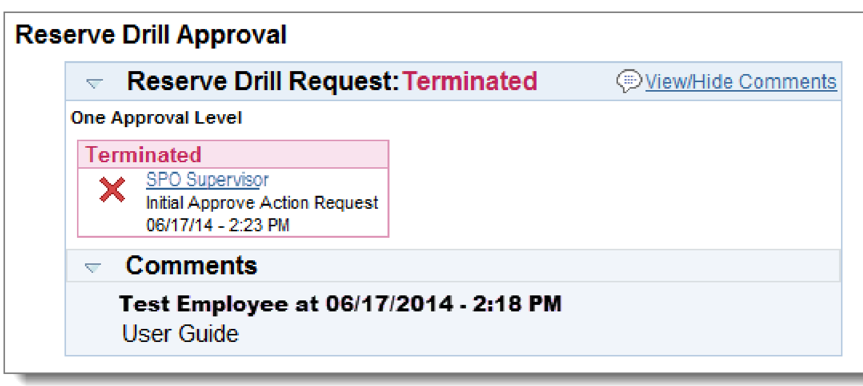


Figure 56: Terminated Drill Request

6.5 Administrative IDT Tasks

Administrative tasks include scheduling drills, viewing scheduled drills, changing the status of drills, approving drills and denying drills and cancelling paid drills.

6.3.1 Schedule Drills

1. To schedule drills for members, from the portal homepage click on IDT Drills from the Reserve Administration box.

Figure 57: Reserve Drills

2. The Reserve Drills page is displayed.

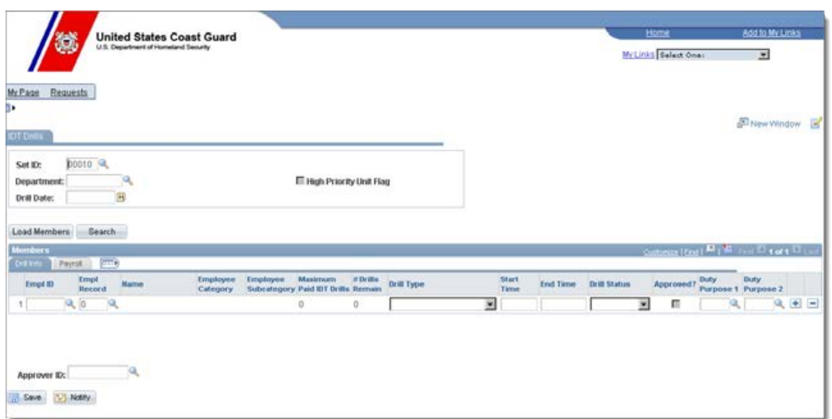


Figure 58: Drill Request Page

The table below lists a description of the fields on this page.

Field Name	Description
EmplID	This is the EmplID of the member.
Empl Record	This is the same as Employee Instance.
Name	This is the name of the member.
Employee Category	This is the category for the member.
Employee Subcategory	This displays the member's TRAYPAY CAT.
Maximum Paid IDT Drills	This is the amount of maximum paid IDT the member is allowed.
# of Drills Remain	This is the remaining amount of drills the member has.
Drill Type	This is the type of drill the member is going to perform.
Start Time	This is the start time for the member's drill.

Field Name	Description
End Time	This is the end time for the member's drill.
Dill Status	This is the status of the members drill. Cancelled = Does not count as an absence Completed= Completed drill Scheduled = A scheduled drill Unexcused = Counts as an absence and cannot be made up.
Approved	Checked = approved for pay Unchecked = not approved for pay
Duty Purpose 1	Reason for drill.
Duty Purpose 2	Reason for multiple drills.
+	Insert a new row to schedule additional drills for the member.
−	Delete a member to which no drill is being scheduled for.
Pay Code	The pay type for the drill: Full, Half, No Pay
Meal Eligibility	The meal allowance for the drill.
SDAP	Special Duty Assignment Pay code for which the member will receive payment for. Member cannot receive SDAP and FLP for the same drill.
FLP Code	Foreign Language Pay Code is the language that the member is going to receive the bonus for. Member cannot receive FLP and SDAP for the same drill. FHD and non-paid drills are not eligible for FLP.
Proficiency	This the language proficiency at which the member is rated.

Table 9: Reserve Drills Field Descriptions

3. The SetID will be defaulted.

4. Enter the Department by using the magnifying lookup tool or by entering it directly.

5. Enter the Drill Date by using the calendar tool or by entering it directly.

6. Click Load Members to load all of the members from that department.

7. For members which drills are not being scheduled, click − to remove them from the list. Members that are not removed from the list and no drill has been schedule, an error message will generate upon saving.

8. To schedule drills for the remaining members, fill out the fields and click 'Save'.

9. The same user cannot schedule and approve the drills.

6.3.2 View Scheduled Drills

To view scheduled drills, follow steps 1 -2 from Section 6.3.1 to access the Reserve Drills page seen below.

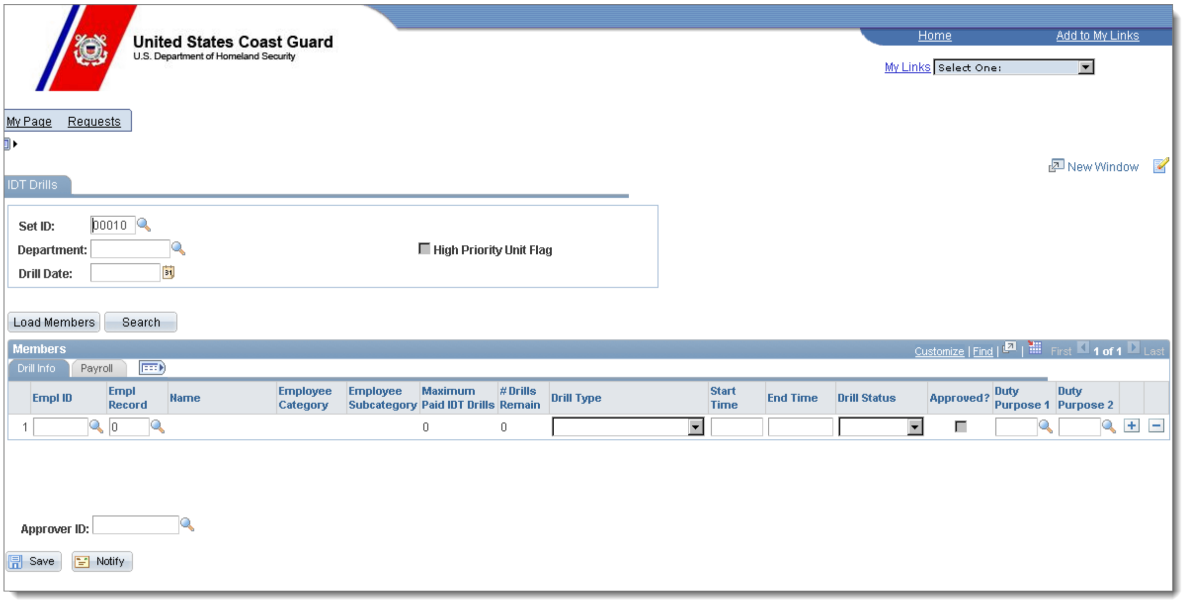


Figure 59: Reserve Drills

1. The Set ID is defaulted.

2. Enter the ‘Department’ for which to view scheduled drills for.

3. Enter the ‘Drill Date’ for which to view scheduled drills for.

4. Click ‘Search’.

5. This will display a list of members who have scheduled drills for the specified drill date.

6.3.3 Changing Drill Statuses

To change the status of the scheduled drills, follow steps 1 - 2 from Section 6.3.1 to access the Reserve Drills page seen below.

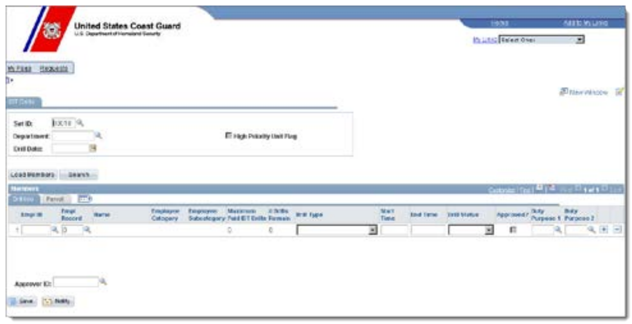


Figure 60: Reserve Drills

1. The Set ID will be defaulted.

2. Enter the 'Department'.

3. Enter the 'Drill Date'.

4. Click 'Load Members'. This will display all of the members in the specified department who have scheduled drills for the specified drill date.

5. Select the 'Drill Status' for the drop down.

6. Enter the 'Approver's ID'.

7. Click 'Save'.

8. To send a notification to the Approver, click 'Notify'. Fill out the form displayed and click 'Ok' to send the notification.

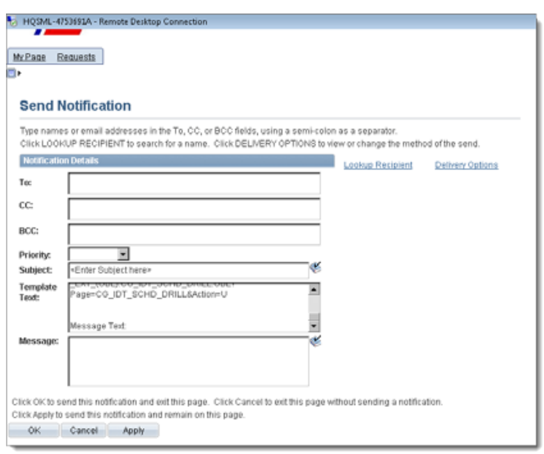


Figure 61: Send Notification

6.3.4 Approving and Denying Drills

To approve or deny drills, refer to Section 6.2 to access the 'View My Request (all types)' page.

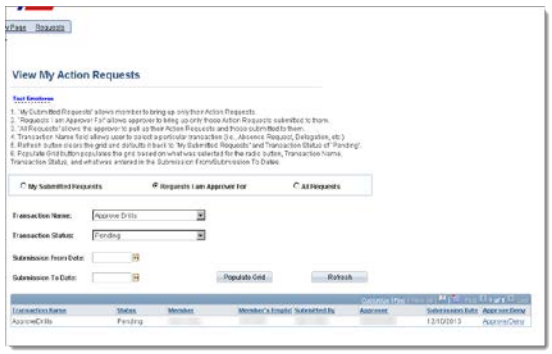


Figure 62: View My Request

1. Select 'Request I am Approver For'.
2. Select 'Approve Drills' as the 'Transaction Name' from the drop down.
3. Select 'Pending' from 'Transaction Status' drop down.
4. Select the 'Submission From Date'.
5. Select the 'Submission to Date'.
6. Click 'Populate Grid' to display the request that the member is an approver for.
7. Click the 'Approve/Deny' link for the request.
8. A new window will open to Approve/Deny the request.

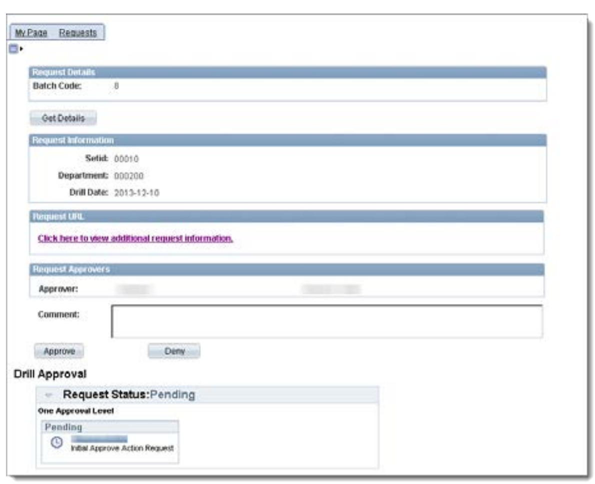


Figure 63: Approve/Deny Request

Each request has a unique ‘Batch Code’.

Members can click on the ‘Get Details’ button to display the Department and Drill Date in the ‘Request Information’ box.

The ‘Click here to view additional request information’ will open a new window that will list all of the details of the drill.

CG_IDT_DRILLS_BY_BATCH_CODE

Download results in : Excel SpreadSheet CSV Text File XML File (6 kb)

View All

	Empl ID	Empl Rcd	Name	Drill Date	Drill Type	Paid IDT Cap	# Paid Drills	Start Time	End Time	Drill Status	Approved	Duty Purpose	Description	Duty Purpose 2	Description	Pay Code	Meal Elig	SDAP	Description	Lang Cd	Description	Level	Description	Se
1		0		12/10/2013	ATP - Single	60	0	9:00:00.000000AM	1:00:00.000000PM	Completed	Y	AB	Pub Affair			Half	None							00
2		0		12/10/2013	ATP - Single	60	0	9:00:00.000000AM	1:00:00.000000PM	Completed	Y	AC	ContinPrep			Half	None							00
3		0		12/10/2013	ATP - Single	60	0	9:00:00.000000AM	1:00:00.000000PM	Completed	Y	AB	Pub Affair			Half	None							00
4		0		12/10/2013	ATP - Single	60	0	9:00:00.000000AM	1:00:00.000000PM	Completed	Y	AC	ContinPrep			Half	None							00
5		0		12/10/2013	ATP - Single	60	0	9:00:00.000000AM	1:00:00.000000PM	Completed	Y	AB	Pub Affair			Half	None							00
6		0		12/10/2013	ATP - Single	60	0	9:00:00.000000AM	1:00:00.000000PM	Completed	Y	AB	Pub Affair			Half	None							00

Figure 64: Additional Request Information

If the drill request requires any corrections, use the ‘Comment’ section for details and click ‘Deny’. The system will route the request to the requester and no payments will be generated.

If no corrections are required on the request, use the ‘Comment’ section for any details and click ‘Approve’. The system will mark each drill as ‘Approved’, save them and generate a Positive Input Transactions for Global Payroll. The ‘Request Status’ will update to ‘Approved’.

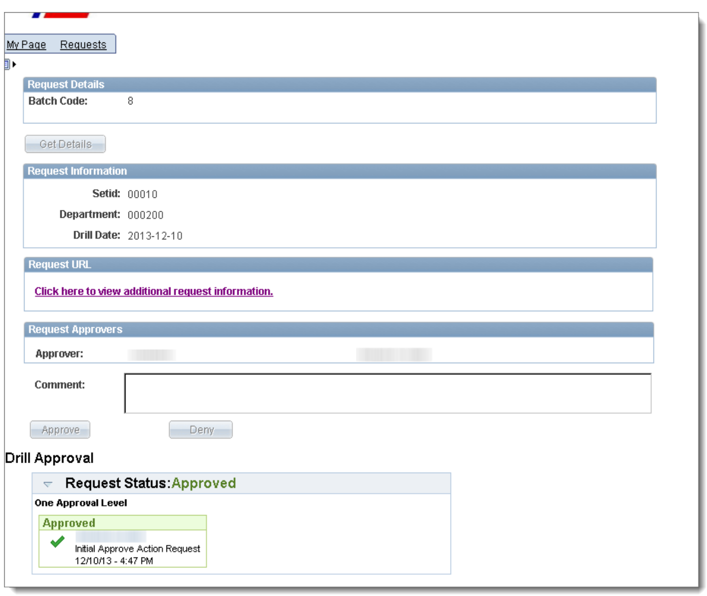


Figure 65: Approved Request

6.3.5 Cancelling Paid Drills

To cancel a paid drill, follow steps 1 -2 from Section 6.3.1 to access the Reserve Drills page seen below.

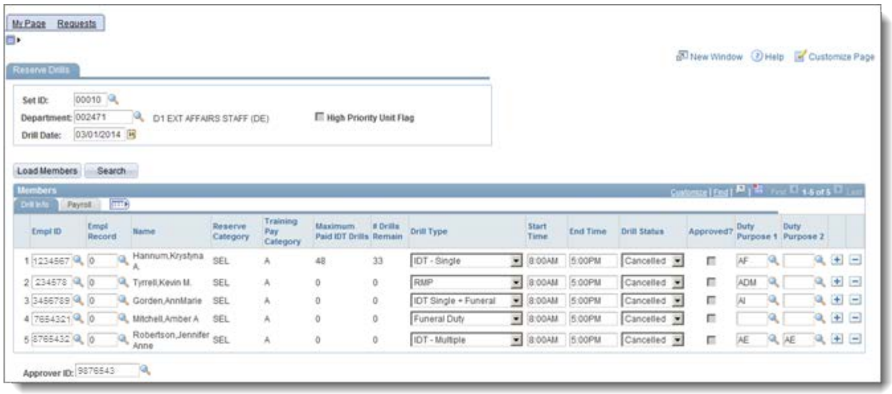


Figure 66: Member Drills Page

1. Select Cancelled from the Drill Status drop down for cancelling payment to members.

2. Enter the Approver ID and click Save. The Approver will receive a notification

6.3.6 Approving Cancelled Paid Drills

To approve or deny drills, refer to Section 6.2 to access the 'View My Request (all types)' page.

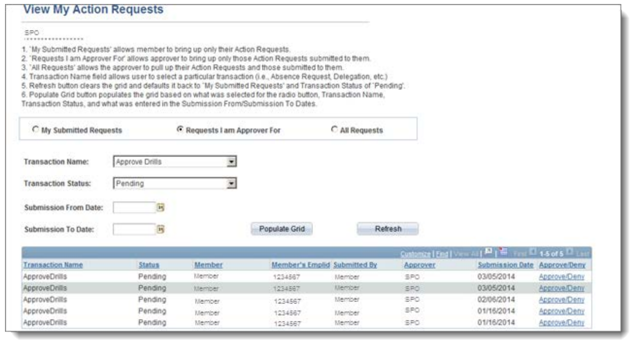


Figure 67: View My Request

1. Select 'Request I am Approver For'.

2. Select 'Approve Drills' as the 'Transaction Name' from the drop down.

3. Select 'Pending' from 'Transaction Status' drop down.

4. Select the 'Submission From Date'.

5. Select the 'Submission to Date'.

6. Click 'Populate Grid' to display the request that the member is an approver for.

7. Click the 'Approve/Deny' link for the request.

8. A new window will open to Approve/Deny the request.

9. Enter any comments and click Approve. The paid drills have now been cancelled.

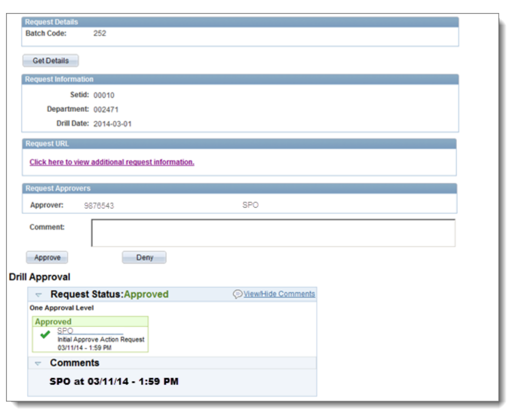


Figure 68: Approval Page

10. To view the cancelled drills, from the portal homepage access the IDT Drills page.

11. Enter the Department.

12. Enter the Drill Date.

13. Click Load Members.

14. The Approved checkbox will be checked representing the approved cancelled paid drills.

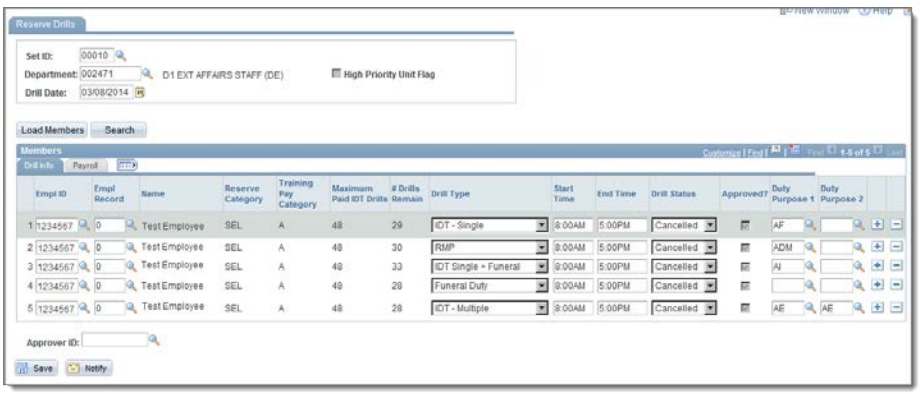


Figure 69: Approved Cancelled Paid Drills

6.6 View Member Drills Report

The View Member Drills Report displays a member's scheduled drills for the past, present and future. To access the report click on the View Member Drills link in the Reserve Administration pagelet from the portal homepage.

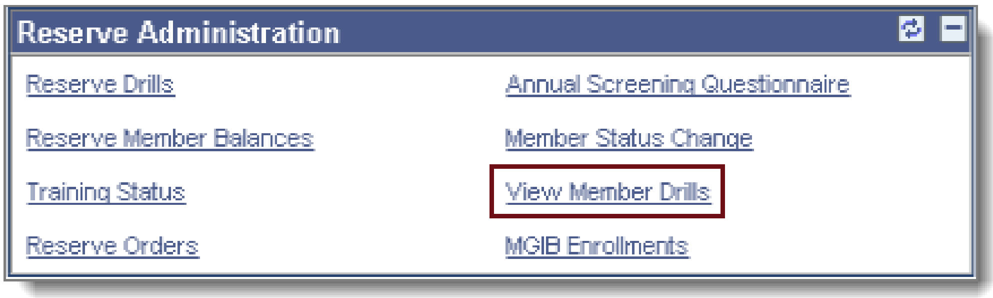


Figure 70: View Member Drills Link

1. Click on the View Member Drills link.

2. Enter the EmplID of the member.

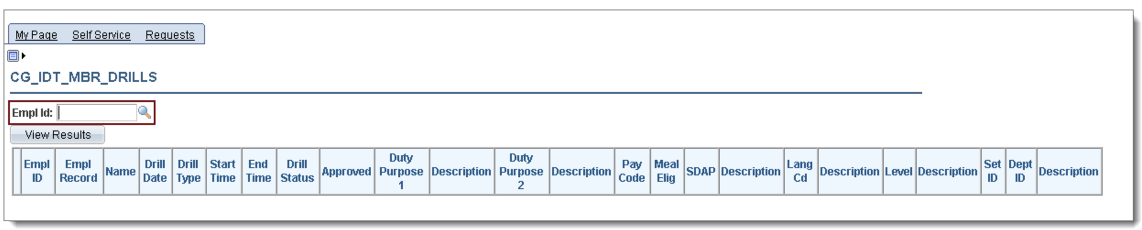
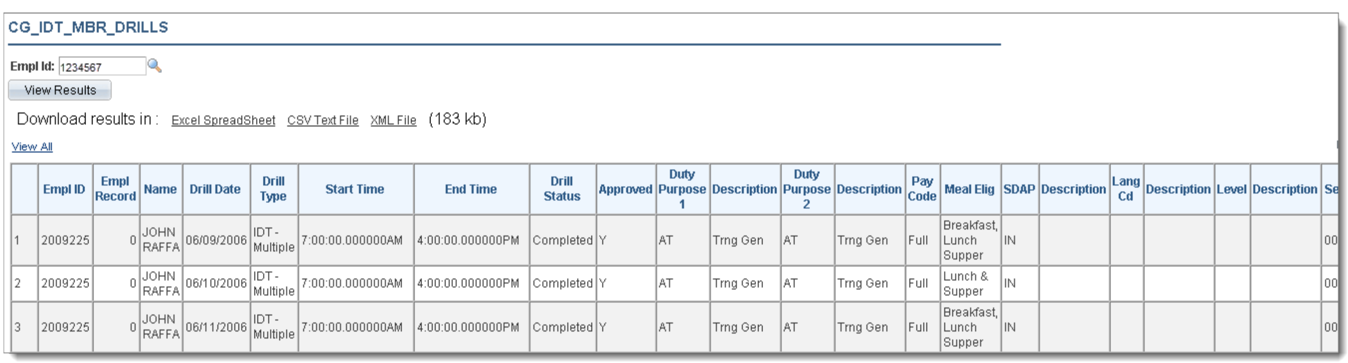


Figure 71: View Member Drills Report

3. Click View Results. A list of drills for the member is displayed.


CG_IDT_MBR_DRILLS

Empl Id: 1234567

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (183 kb)

View All

	Empl ID	Empl Record	Name	Drill Date	Drill Type	Start Time	End Time	Drill Status	Approved	Duty Purpose 1	Description	Duty Purpose 2	Description	Pay Code	Meal Elig	SDAP	Description	Lang Cd	Description	Level	Description	Se
1	2009225	0	JOHN RAFFA	06/09/2006	IDT - Multiple	7:00:00.000000AM	4:00:00.000000PM	Completed	Y	AT	Trng Gen	AT	Trng Gen	Full	Breakfast, Lunch Supper	IN						00
2	2009225	0	JOHN RAFFA	06/10/2006	IDT - Multiple	7:00:00.000000AM	4:00:00.000000PM	Completed	Y	AT	Trng Gen	AT	Trng Gen	Full	Lunch & Supper	IN						00
3	2009225	0	JOHN RAFFA	06/11/2006	IDT - Multiple	7:00:00.000000AM	4:00:00.000000PM	Completed	Y	AT	Trng Gen	AT	Trng Gen	Full	Breakfast, Lunch Supper	IN						00

Figure 72: View Member Drill Report Results

6.7 Member All Duty Report

The Member All Duty Report displays a member's . To access the report click on the Member All Duty Report link in the Employee pagelet under Tasks from the portal homepage.

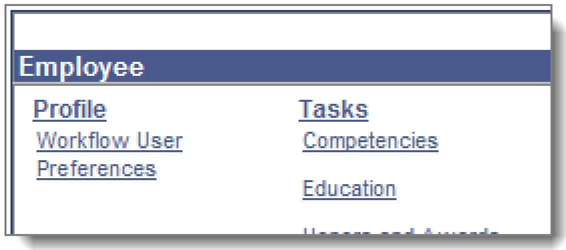


Figure 73: Member All Duty Report

Enter the year for which the report is to be run and click View Results.

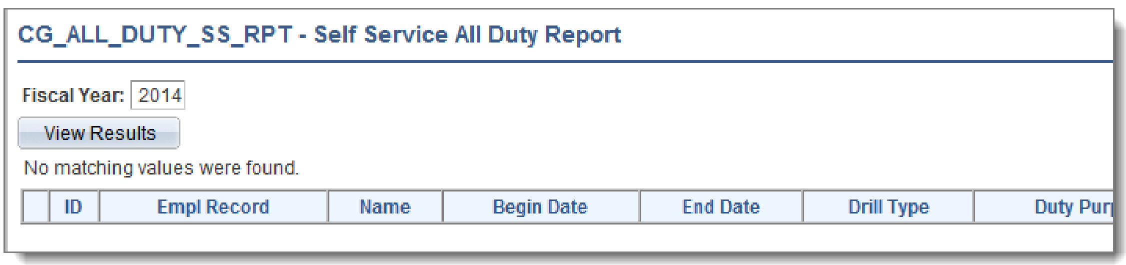


Figure 74: Member All Duty Report Results

6.8 Reserve Drills

The Reserve Drills page displays points the member has accumulated for drills, allows the administrator to set the paid IDT cap and the paid RMP cap for the member.

1. To access this page from the portal homepage click on the Reserve Member Balances link in the Reserve Administration pagelet.

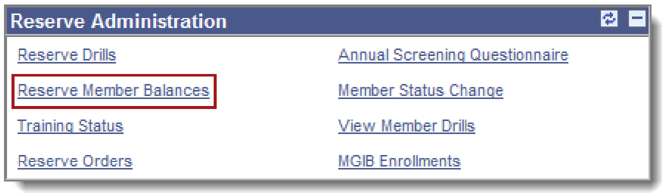


Figure 75: Reserve Member Balances Link

2. Enter the search criteria for the member and click Search.

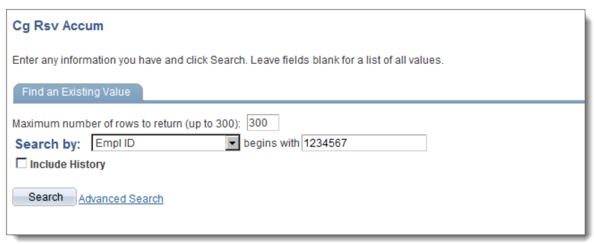
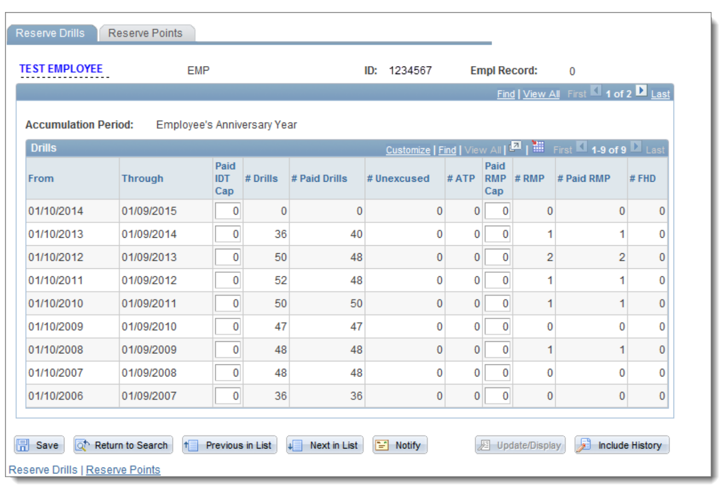


Figure 76: Reserve Member Balances Search Page

3. This page displays the member's point balances.



From	Through	Paid IDT Cap	# Drills	# Paid Drills	# Unexcused	# ATP	Paid RMP Cap	# RMP	# Paid RMP	# FHD
01/10/2014	01/09/2015	0	0	0	0	0	0	0	0	0
01/10/2013	01/09/2014	0	36	40	0	0	0	1	1	0
01/10/2012	01/09/2013	0	50	48	0	0	0	2	2	0
01/10/2011	01/09/2012	0	52	48	0	0	0	1	1	0
01/10/2010	01/09/2011	0	50	50	0	0	0	1	1	0
01/10/2009	01/09/2010	0	47	47	0	0	0	0	0	0
01/10/2008	01/09/2009	0	48	48	0	0	0	1	1	0
01/10/2007	01/09/2008	0	48	48	0	0	0	0	0	0
01/10/2006	01/09/2007	0	36	36	0	0	0	0	0	0

Figure 77: Reserve Drills Page

4. Make any necessary adjustments to the member's Paid IDT Cap and or the Paid RMP Cap and click save.

7.0 Retirement Points

7.1 Administrator View

1. Administrators can access Retirement Points from the portal homepage by clicking on the Reserve Member Balances link in the Reserve Administration pagelet.

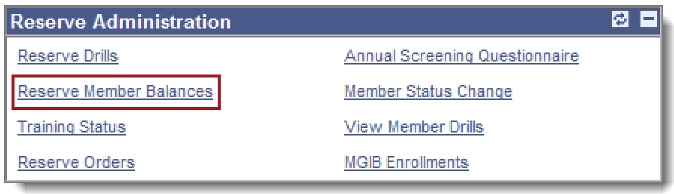


Figure 78: Reserve Member Balances

2. Enter the search criteria and click search.

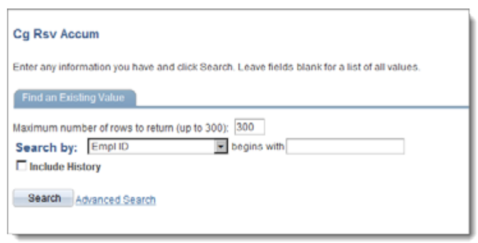


Figure 79: Reserve Member Balances Search Page

3. From the search results select the member. To view the member's department, current rating and rank, mouse over the Member's name.

   On the Reserve Points tab the Total Qualifying Years of Service and Career-to-Date Points are listed.

   Coast Guard points are displayed based on two views: Fiscal Year or Anniversary Year. To switch between the two views, click on the left or right arrows.

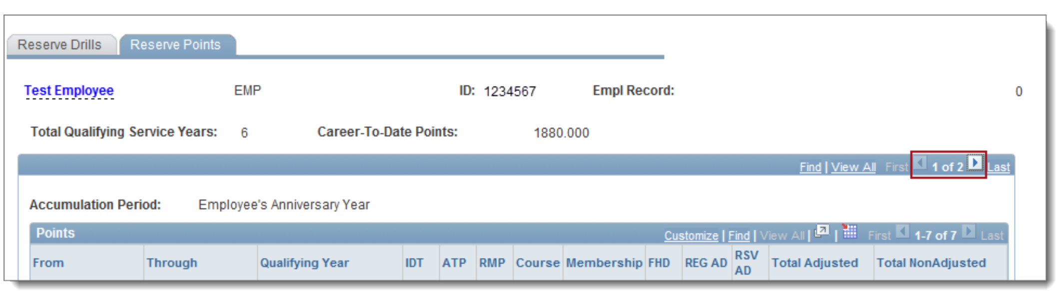
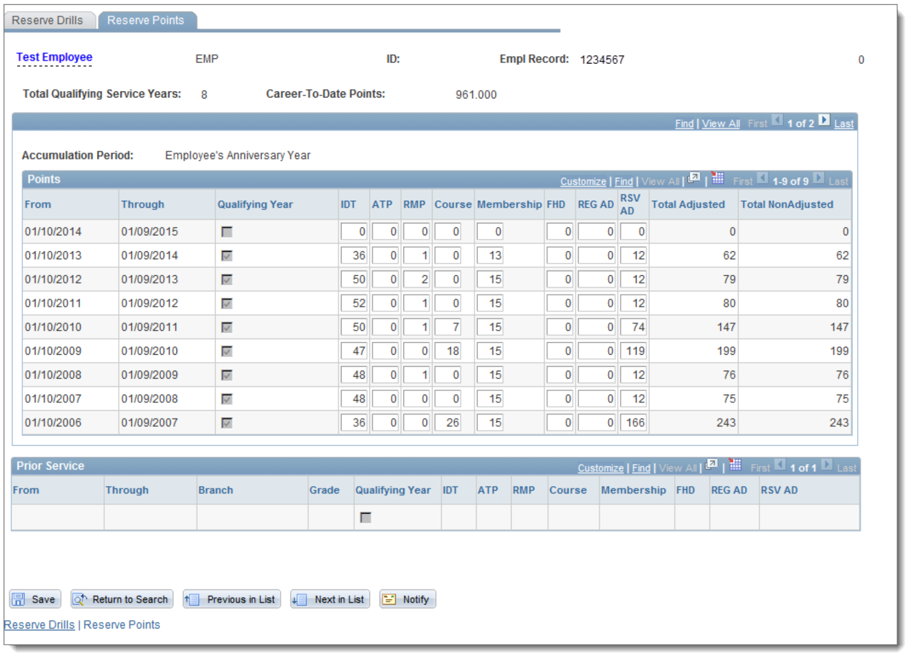


Figure 80: Toggle Views

Only Coast Guard retirement points can be adjusted on this page. Adjustments to non-Coast Guard prior service retirement points must be done the on the Prior Service page within the Statement of Creditable Service (SOCS) component.



Reserve Drills | Reserve Points

Test Employee EMP ID: Empl Record: 1234567 0

Total Qualifying Service Years: 8 Career-To-Date Points: 961.000

Find | View All First 1 of 2 Last

Accumulation Period: Employee's Anniversary Year

Points — Customize | Find | View All | First 1-9 of 9 Last

From	Through	Qualifying Year	IDT	ATP	RMP	Course	Membership	FHD	REG AD	RSV AD	Total Adjusted	Total NonAdjusted
01/10/2014	01/09/2015	☐	0	0	0	0	0	0	0	0	0	0
01/10/2013	01/09/2014	☑	36	0	1	0	13	0	0	12	62	62
01/10/2012	01/09/2013	☑	50	0	2	0	15	0	0	12	79	79
01/10/2011	01/09/2012	☑	52	0	1	0	15	0	0	12	80	80
01/10/2010	01/09/2011	☑	50	0	1	7	15	0	0	74	147	147
01/10/2009	01/09/2010	☑	47	0	0	18	15	0	0	119	199	199
01/10/2008	01/09/2009	☑	48	0	1	0	15	0	0	12	76	76
01/10/2007	01/09/2008	☑	48	0	0	0	15	0	0	12	75	75
01/10/2006	01/09/2007	☑	36	0	0	26	15	0	0	166	243	243

Prior Service — Customize | Find | View All | First 1 of 1 Last

From	Through	Branch	Grade	Qualifying Year	IDT	ATP	RMP	Course	Membership	FHD	REG AD	RSV AD
				☐								

Save | Return to Search | Previous in List | Next in List | Notify

Reserve Drills | Reserve Points

Figure 81: Retirement Points

The Points section displays the history of the member's points accumulation based on an anniversary year or fiscal year. Any anniversary year that meets the requirement of a qualifying year is marked with a check in the Qualifying Year checkbox. The From/Through fields and Qualifying Year checkbox is system assigned and cannot be edited.

The following points can be edited:

- **IDT** - displays points earned for inactive duty training drills. One point for each authorized single IDT drill performed in a pay or a non-pay status. Two points for each authorized multiple IDT drill performed in a pay or non-pay status.

- **ATP** - displays points earned for additional training drills. One point for each authorized single ATP drill performed in a pay or a non-pay status. Two points for each authorized multiple ATP drill performed in a pay or non-pay status.

- **RMP** - displays points earned for readiness management periods (RMP). One point for each authorized RMP performed in a pay or a non-pay status.

- **Course** - displays points earned for completion of approved correspondence or distance learning courses.

- **Membership** - displays points earned for membership in an active status. 15 points for each anniversary year. Pro-rated in the case of less than a fully AY.

- **FHD** - displays points earned for funeral honors duty. One point for each authorized FHD period performed in a pay on a non-pay status.

- **REG AD** - displays points earned as a member of the active component. One point per day active duty.

- **RES AD** - displays points earned for performance of active duty (Includes EAD, ADT, ADOS and recalls to AD under Title 10 or 14 U.S.C). One point per day of active duty.

The following points are calculated by the system and cannot be edited:

- **Total Adjusted** - displays the adjusted total of non-active duty and non-FHD duty points creditable for retirement pay calculation purposes. The maximum points are:

  - 60 for any AY ending prior to 23 Sep 1996

  - 75 for any AY beginning on or after 23 Sep 1996 and ending prior to 30 Oct 2000

  - 90 for any AY beginning on or after 30 Oct 200 and ending prior to 30 Oct 2007

  - 130 for any AY beginning on or after 30 Oct 2007.

- **Total Non-Adjusted** - displays the raw total of all points.

Changes made on the fiscal year view do not update the points in Anniversary Year view or the Total Qualifying Service Years and Career-To-Date points.

Any points that are manually adjusted may cause retirement points to be out-of-sync with supporting data. For example, if points were manually added for Correspondence Course, there will not be data in the system to support the points. Whenever possible, supporting data should be added to Direct Access so that the system automatically awards the points. Under no circumstances should supporting data be added AND the corresponding points manually adjusted.

7.2 Administrator Update

1. Click on the Reserve Member Balances link.

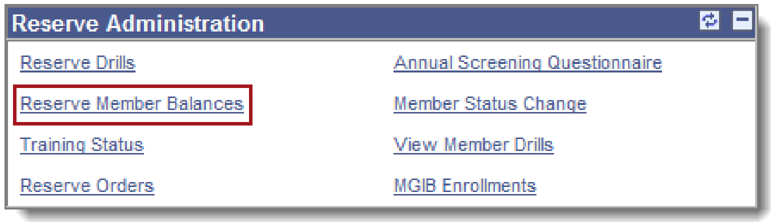


Figure 82: Reserve Member Balances

2. Enter the search criteria and click search.

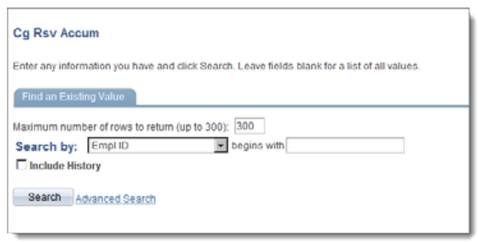


Figure 83: Reserve Member Balances Search Page

3. From the search results select the member. To view the member's department, current rating and rank, mouse over the Member's name.

4. Update the points for the appropriate column and fiscal year.

5. Click Save.

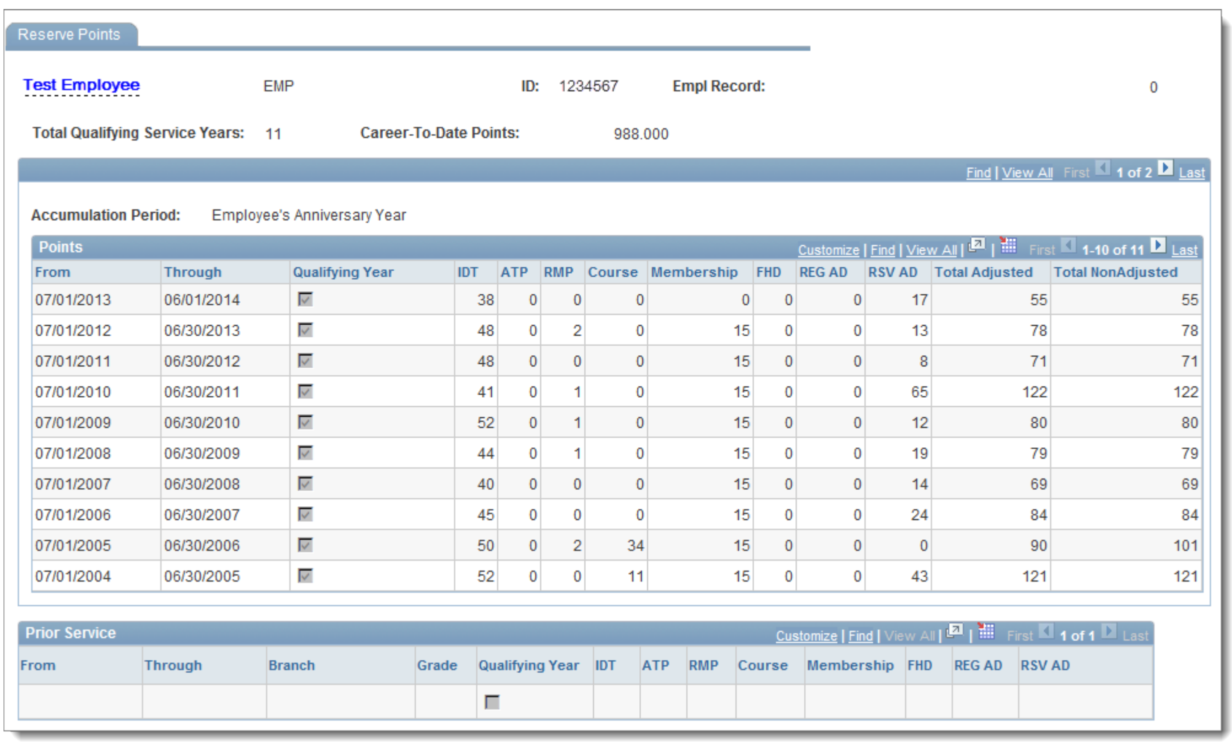
6. The Total Adjusted and Total Non Adjusted columns will automatically update.

7.3 Self-Service

To view Retirement Points as a Self Service member, from the Portal Homepage click on the View My Reserve Points Statement link in the Employee pagelet.

Figure 84: Self-Service Reserve Points Statement

A view only page displays the member's Reserve Points Statement.



Reserve Points

Test Employee EMP ID: 1234567 Empl Record: 0

Total Qualifying Service Years: 11 Career-To-Date Points: 988.000

Find | View All First 1 of 2 Last

Accumulation Period: Employee's Anniversary Year

Points — Customize | Find | View All | First 1-10 of 11 Last

From	Through	Qualifying Year	IDT	ATP	RMP	Course	Membership	FHD	REG AD	RSV AD	Total Adjusted	Total NonAdjusted
07/01/2013	06/01/2014	☑	38	0	0	0	0	0	0	17	55	55
07/01/2012	06/30/2013	☑	48	0	2	0	15	0	0	13	78	78
07/01/2011	06/30/2012	☑	48	0	0	0	15	0	0	8	71	71
07/01/2010	06/30/2011	☑	41	0	1	0	15	0	0	65	122	122
07/01/2009	06/30/2010	☑	52	0	1	0	15	0	0	12	80	80
07/01/2008	06/30/2009	☑	44	0	1	0	15	0	0	19	79	79
07/01/2007	06/30/2008	☑	40	0	0	0	15	0	0	14	69	69
07/01/2006	06/30/2007	☑	45	0	0	0	15	0	0	24	84	84
07/01/2005	06/30/2006	☑	50	0	2	34	15	0	0	0	90	101
07/01/2004	06/30/2005	☑	52	0	0	11	15	0	0	43	121	121

Prior Service — Customize | Find | View All | First 1 of 1 Last

From	Through	Branch	Grade	Qualifying Year	IDT	ATP	RMP	Course	Membership	FHD	REG AD	RSV AD
				☐								

Figure 85: Self-Service Reserve Points Statement

8.0 Reserve Orders

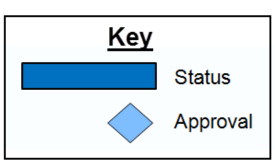
8.1 Summary

Below is a chart that displays that an order's status and process flow

Status	Trigger to set status	Description
Proposed	RSV – initial order creation	Initial order request created by member, supervisor or SPO.
Authorized	RSV – authorized by DXR	Indicates financial and command authority. Order now appears in airport terminal
Ready	RSV –travel details approved by SPO supervisor	Order is ready for member to depart. Funding established. Leave approved
En Route	RSV – departs/reports approved by SPO supervisor	Member has departed home unit, Actual depart date entered, departing pay entitlements established and/or stopped
Finished	RSV – ST automatic upon end date	Order execution completed. All actual dates completed and approved. No more changes allowed to order. Pay entitlements stopped/started
Cancelled	Cancel approval by SPO supervisor or DXR	Order cancelled. Pay entitlements or other integrations backed out (Automatically or Manually). No more changes to order allowed. TONO still active unless cancelled with order action

Figure 86: Order Status

	Approval Type	Description
R	Recommend Order	Allows command or supervisor to recommend member submitted order request
A	Authorize Order	PSC, DXR or AO authorization of Order & TONO
T	Travel Details	SPO Supervisor approval of travel details (optional)
D	Departing Endorsement Reporting Endorsement Multiple Dpt/Rpt Endorsements	SPO Supervisor approval of actual depart or report
E	Amend Order	PSC, DXR or AO, SPO Supervisor of extending duty date?
C	Cancel Order	PSC, DXR or AO, SPO Supervisor of Cancel Approval



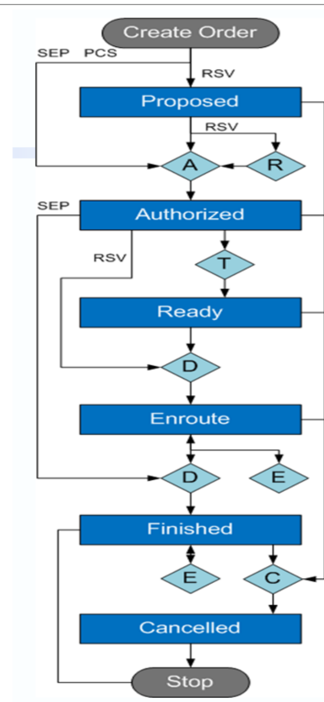


Figure 87: Approval Flows

8.2 Member Self-Service

8.2.1 Submit an Order to Command for Recommendation

Self-Service members that would like to recommend themselves for an order can follow the steps below to do so.

1. To access the Reserve Orders page from the portal homepage click on Tasks in the Employee pagelet.

Figure 88: Self-Service Reserve Orders

2. Click My Reserve Orders.

Figure 89: Reserve Orders Link

3. Click Add a New Value. All of the fields on this page are required.

4. For this example, a Short Term ADT-AT order with a Single Travel Claim will be created. All of the fields on this tab are required to be filled out to add a new order.

5. Click Add a New Value tab and enter the member's EmplID.

6. The Empl Rcd and Trans ID are defaulted to 0.

7. Select the Duty Type from the drop down.

8. Use the calendar tool to select a Begin Date.

9. Use the calendar tool to select an End Date.

10. Click Add.

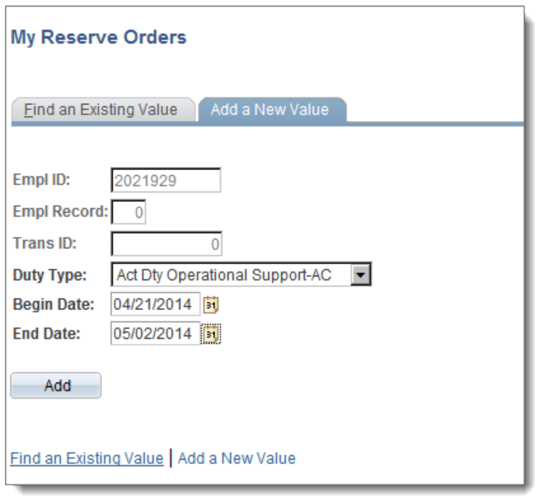


Figure 90: Add New Reserve Order

11. The Reserve Order page will display. The Trans ID will display 0 since the order has not been created. The order will be created once the fields have been filled, the order has been saved and the Trans ID has been generated. The Route for Authorization button will become available once the order has been saved.

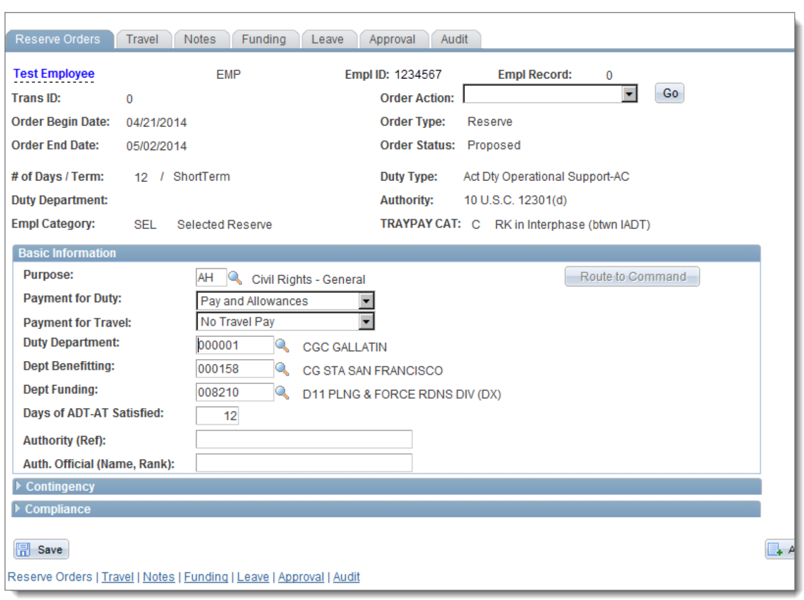


Figure 91: Reserve Order Page

12. Select a Purpose using the lookup tool.

13. The Payment for Duty for an ADT-AT order is defaulted to Pay and Allowances and cannot be changed. This is different for each order type.

14. For Payment for Travel select Single Travel Claim.

15. Select a Duty Department using the lookup tool.

16. The Department Benefitting is defaulted to the member's current department from Job Data.

17. Select a Department Funding using the lookup tool.

18. The Days of ADT-AT Satisfied will be defaulted.

19. Enter a valid Authority Ref.

20. Enter a valid Authority Official.

21. The Contingency section is collapsed for orders not requiring a contingency.

22. The Compliance section is collapsed at all times, click on the section to validate that the order is compliant. Orders that are non-compliant cannot be routed for authorization.

23. Click Save. The Trans ID will generate.

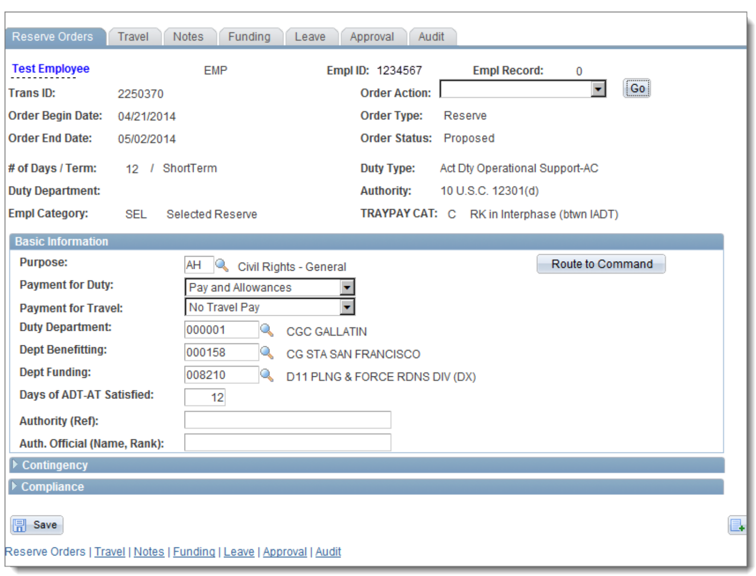


Figure 92: Saved Reserve Order

24. Click Route to Command.

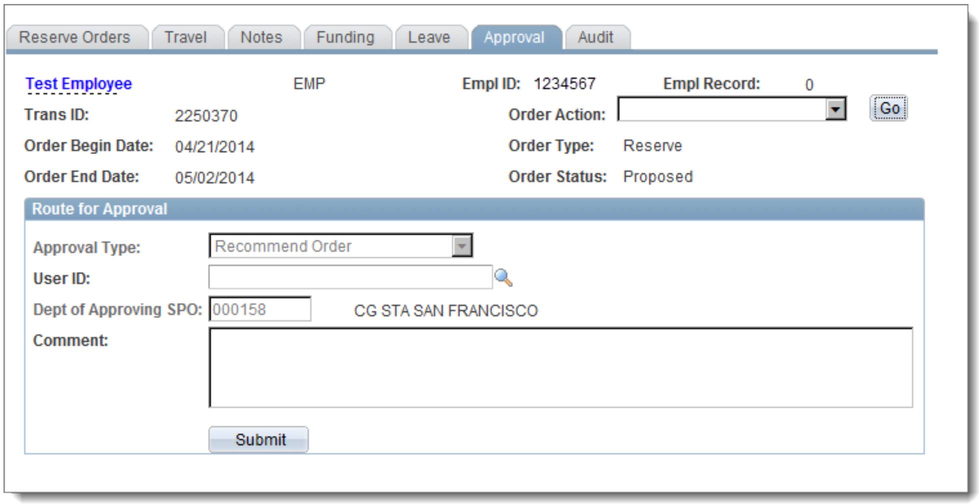


Figure 93: Route to Command

25. Enter the user ID of the Commanding Officer using the lookup tool. The name matching the EmpID will generate.

26. Enter comments. An order cannot be submitted for authorization or approval without comments.

27. Click Submit. The AWE will be created and the approval status of the order will be displayed along with any comments.

8.2.2 Review My Reserve Orders

1. To view orders, from the portal homepage navigate using the following path: Home> Employee> Tasks> My Reserve Orders.

Figure 94: My Reserve Orders

2. Click Search.

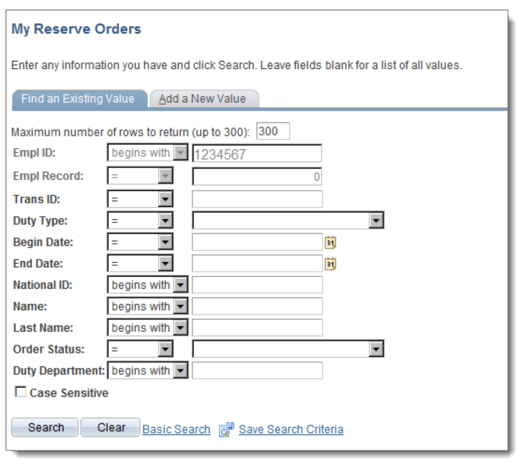
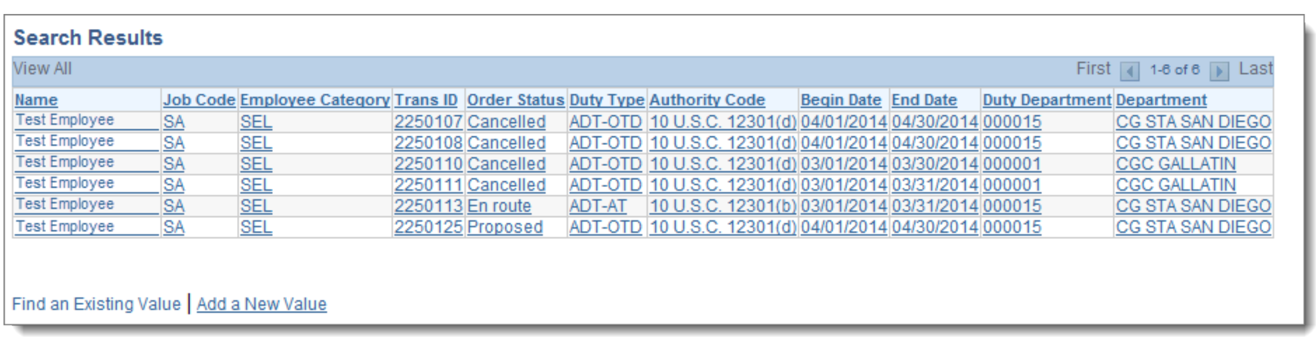


Figure 95: Self-Service Member Orders Search

3. A list of search results will display which lists all of the orders regardless of status that are for the member.


Search Results

View All First 1-6 of 6 Last

Name	Job Code	Employee Category	Trans ID	Order Status	Duty Type	Authority Code	Begin Date	End Date	Duty Department	Department
Test Employee	SA	SEL	2250107	Cancelled	ADT-OTD	10 U.S.C. 12301(d)	04/01/2014	04/30/2014	000015	CG STA SAN DIEGO
Test Employee	SA	SEL	2250108	Cancelled	ADT-OTD	10 U.S.C. 12301(d)	04/01/2014	04/30/2014	000015	CG STA SAN DIEGO
Test Employee	SA	SEL	2250110	Cancelled	ADT-OTD	10 U.S.C. 12301(d)	03/01/2014	03/30/2014	000001	CGC GALLATIN
Test Employee	SA	SEL	2250111	Cancelled	ADT-OTD	10 U.S.C. 12301(d)	03/01/2014	03/31/2014	000001	CGC GALLATIN
Test Employee	SA	SEL	2250113	En route	ADT-AT	10 U.S.C. 12301(b)	03/01/2014	03/31/2014	000015	CG STA SAN DIEGO
Test Employee	SA	SEL	2250125	Proposed	ADT-OTD	10 U.S.C. 12301(d)	04/01/2014	04/30/2014	000015	CG STA SAN DIEGO

Find an Existing Value | Add a New Value

Figure 96: Member's Orders

8.3 Order Process for Command

8.3.1 Approve Recommendation Request for an Order

The Reserve Orders page can be accessed by navigating to the following menu path from the portal homepage in the Reserve Administration pagelet.

1. To authorize an order and TONO, click on Requests from the Portal Homepage.

Figure 97: Requests

2. Click on View My Requests (all types).

Figure 98: View My Requests

3. Select the radio button for Request I am Approver for and click Populate Grid.

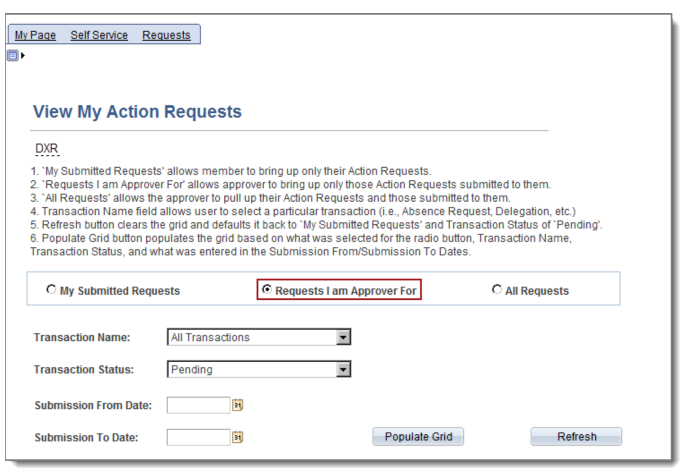


Figure 99: Populate Grid

4. The grid will display a list of all transactions that require approvals. Click on the Approve/Deny link.

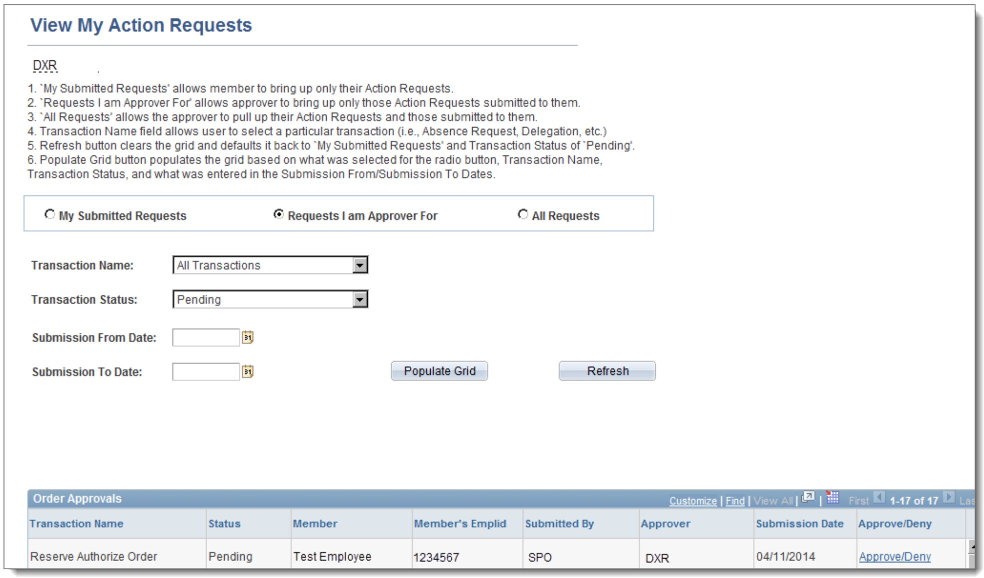


Figure 100: Transaction List

5. The order page will display. Enter comments and click Approve.

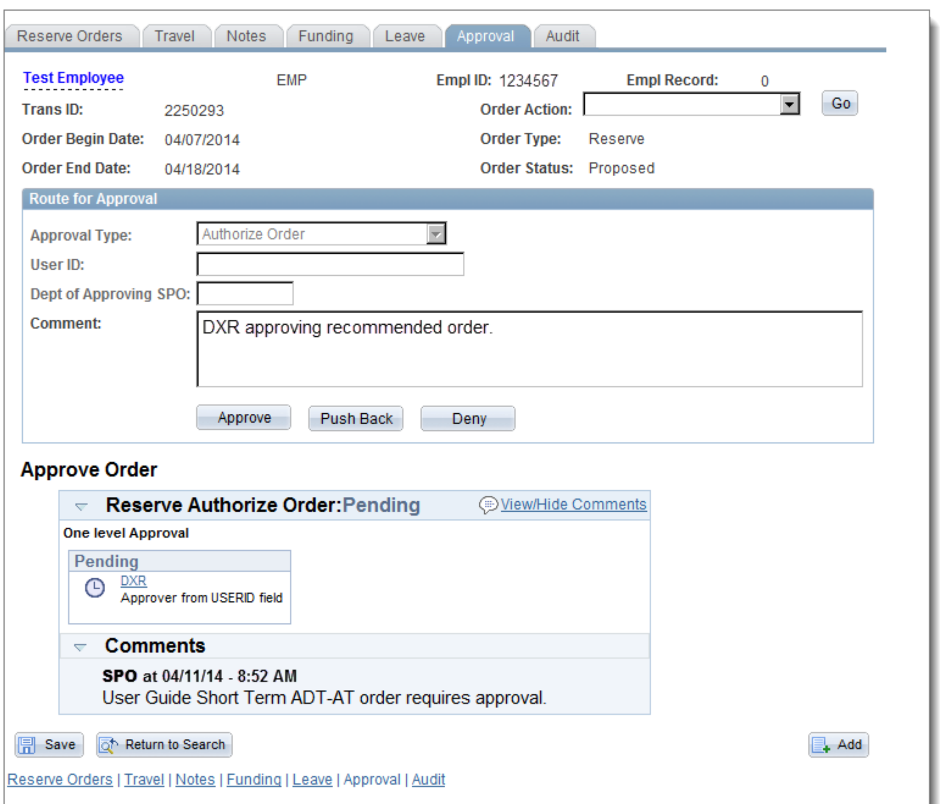


Figure 101: Approving Recommended Order

6. Once the order and TONO has been approved, the Order Status field will update to Authorized. The AWE will update with the new approved status.

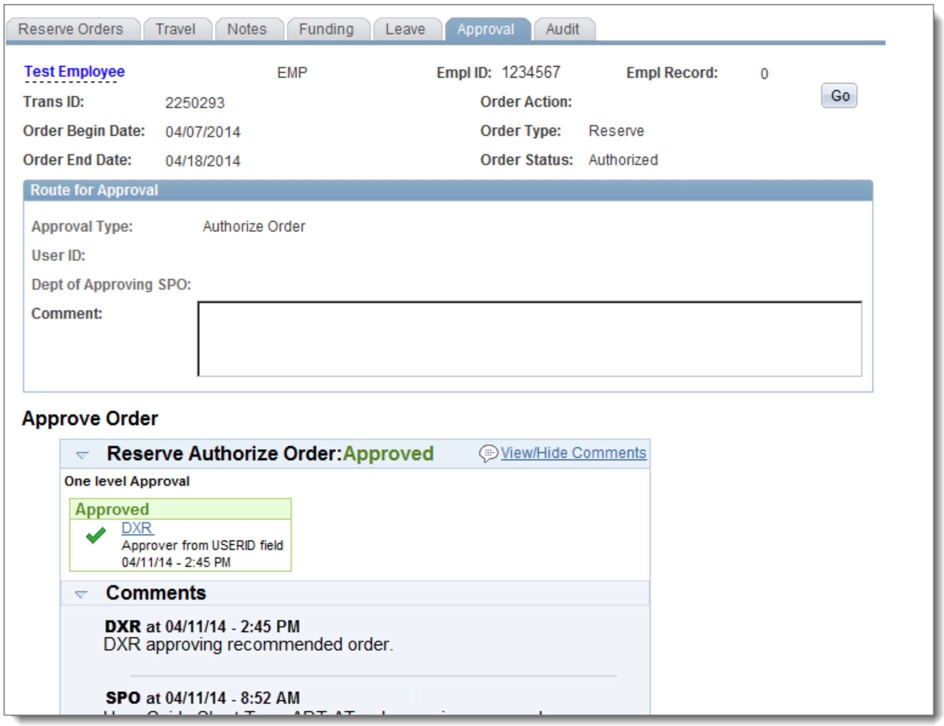
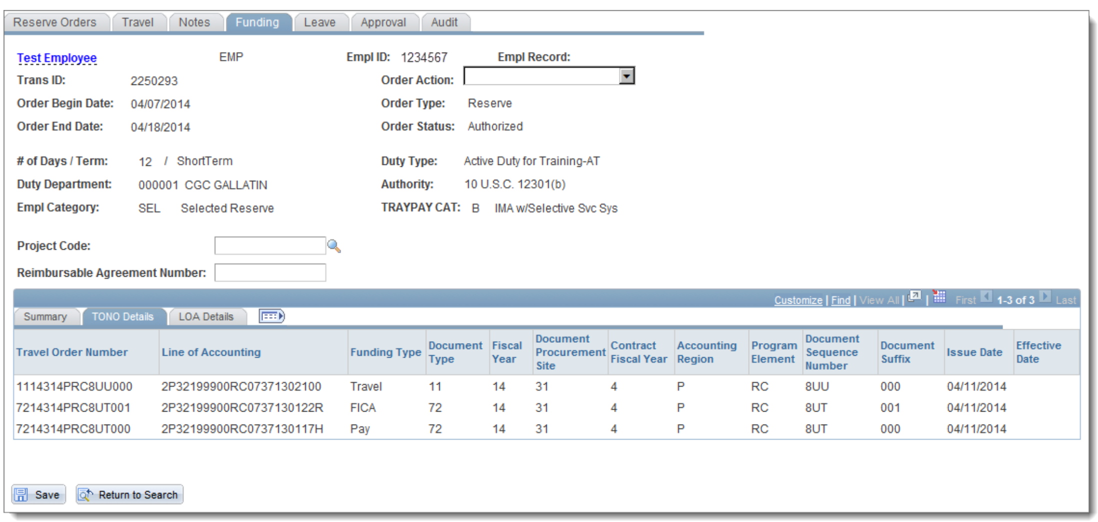


Figure 102: Approved Recommended Order

7. Click on the Funding tab to view the generated and approved TONO details.



Travel Order Number	Line of Accounting	Funding Type	Document Type	Fiscal Year	Document Procurement Site	Contract Fiscal Year	Accounting Region	Program Element	Document Sequence Number	Document Suffix	Issue Date	Effective Date
1114314PRC8UU000	2P32199900RC07371302100	Travel	11	14	31	4	P	RC	8UU	000	04/11/2014	
7214314PRC8UT001	2P32199900RC0737130122R	FICA	72	14	31	4	P	RC	8UT	001	04/11/2014	
7214314PRC8UT000	2P32199900RC0737130117H	Pay	72	14	31	4	P	RC	8UT	000	04/11/2014	

Figure 103: TONO Details

8.3.2 Submit Order for Authorization

1. To submit an order for authorization, from the portal homepage navigate to the Reserve Orders page using the following path: Home> Reserve Administration> Reserve Orders.

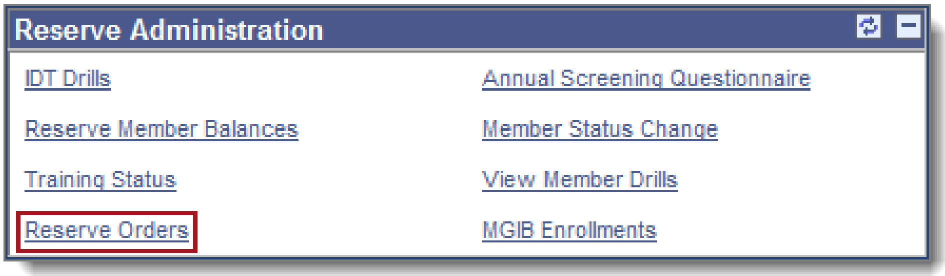


Figure 104: Reserve Orders

2. Enter the TransID of the order requiring authorization and click Search.

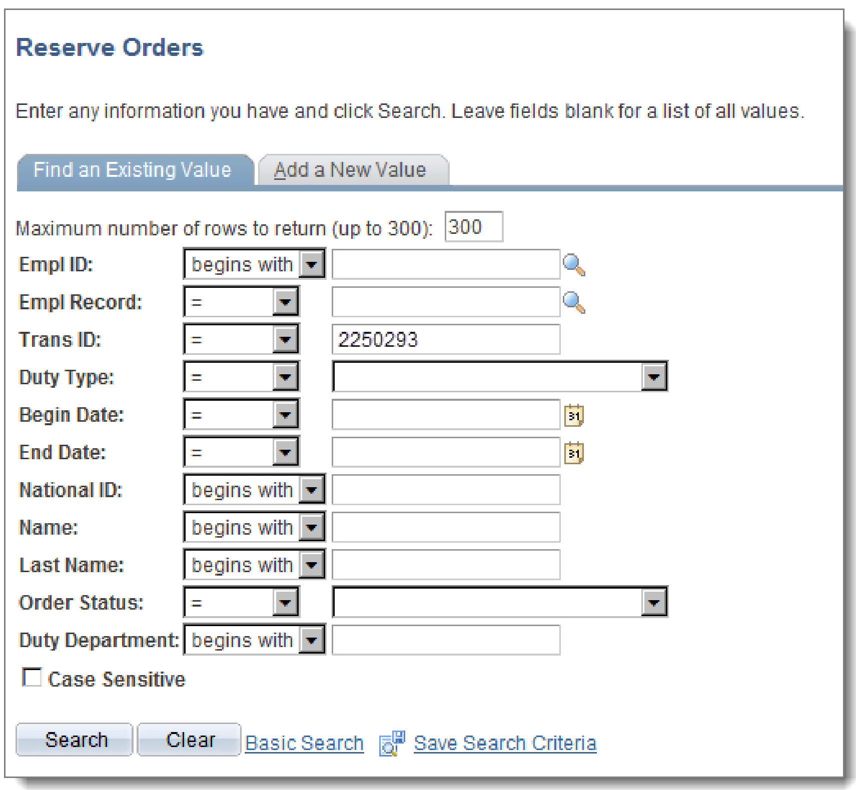


Figure 105: Reserve Orders Search Page

3. The order will display. Click Route for Authorization.

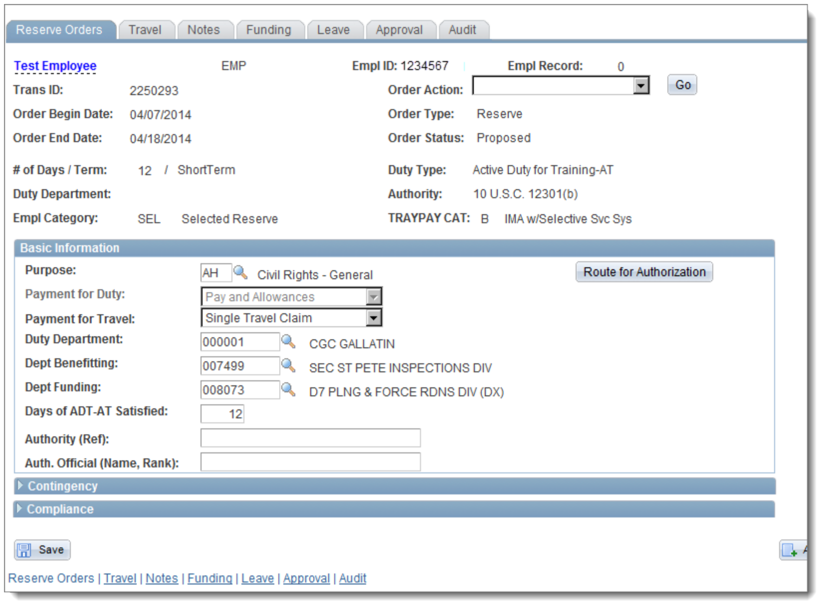


Figure 106: Saved Order

4. Enter the user ID of the approving SPO using the lookup tool. The name matching the EmpID will generate.

5. Enter comments. An order cannot be submitted for authorization or approval without comments.

6. Click Submit. The AWE will be created and the approval status of the order will be displayed along with any comments.

To review an Order, refer to section 8.6.1 Find/Review and Order (Including Audit).

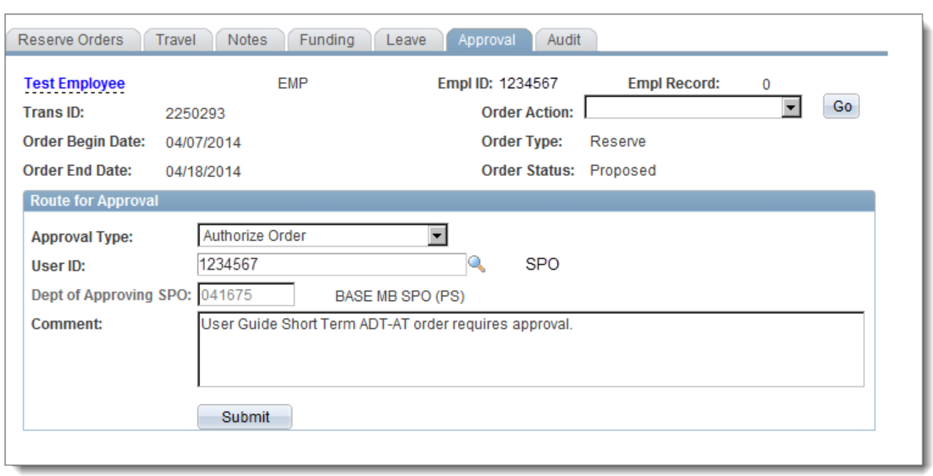


Figure 107: Route for Authorization ADT-AT

8.4 Order Process for DXR

8.4.1 Authorize Order

1. To authorize an order and TONO, click on Requests from the Portal Homepage.

Figure 108: Requests

2. Click on View My Requests (all types).

Figure 109: View My Requests

3. Select the radio button for Request I am Approver for and click Populate Grid.

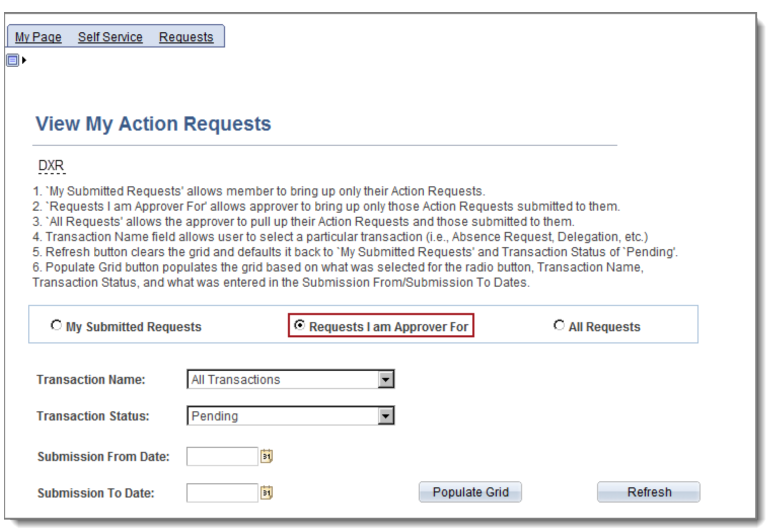


Figure 110: Populate Grid

4. The grid will display a list of all transactions that require approvals. Click on the Approve/Deny link.

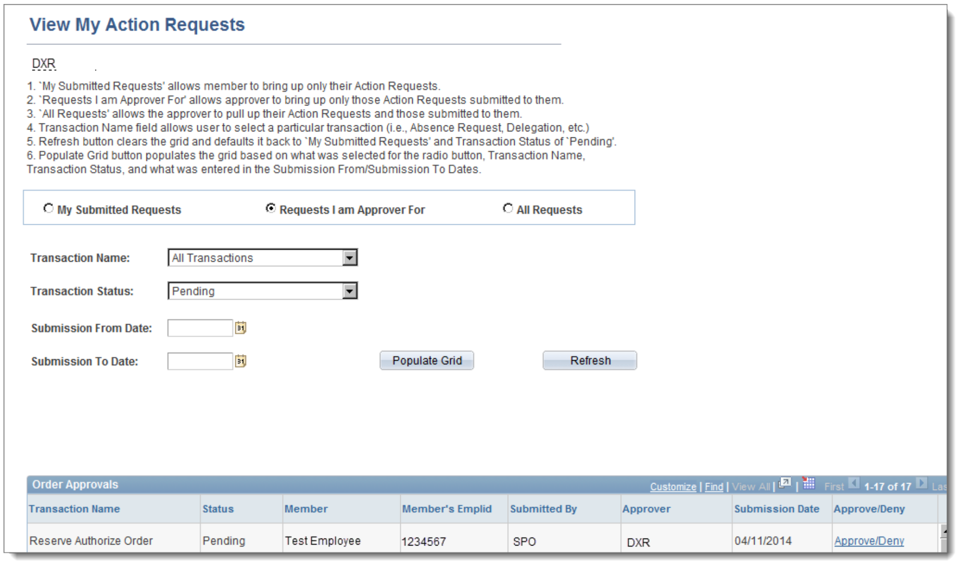


Figure 111: Transaction List

5. The order page will display. Review the other tabs as necessary. Enter comments and click Approve.

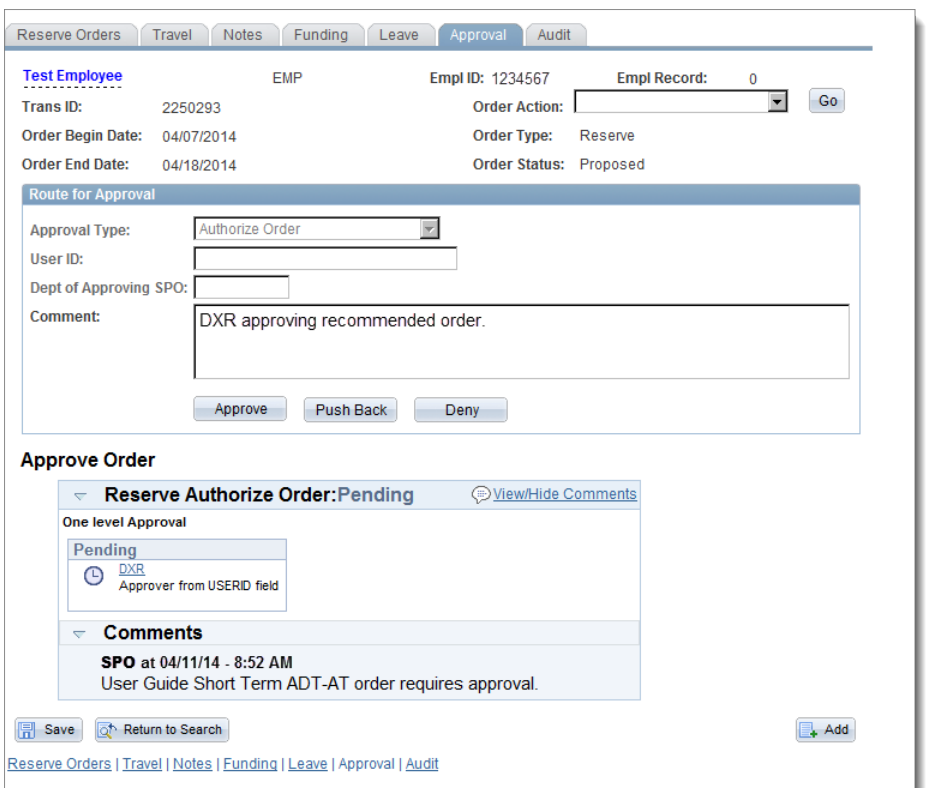


Figure 112: Approving Recommended Order

6. Once the order and TONO has been approved, the Order Status field will update to Authorized. The AWE will update with the new approved status.

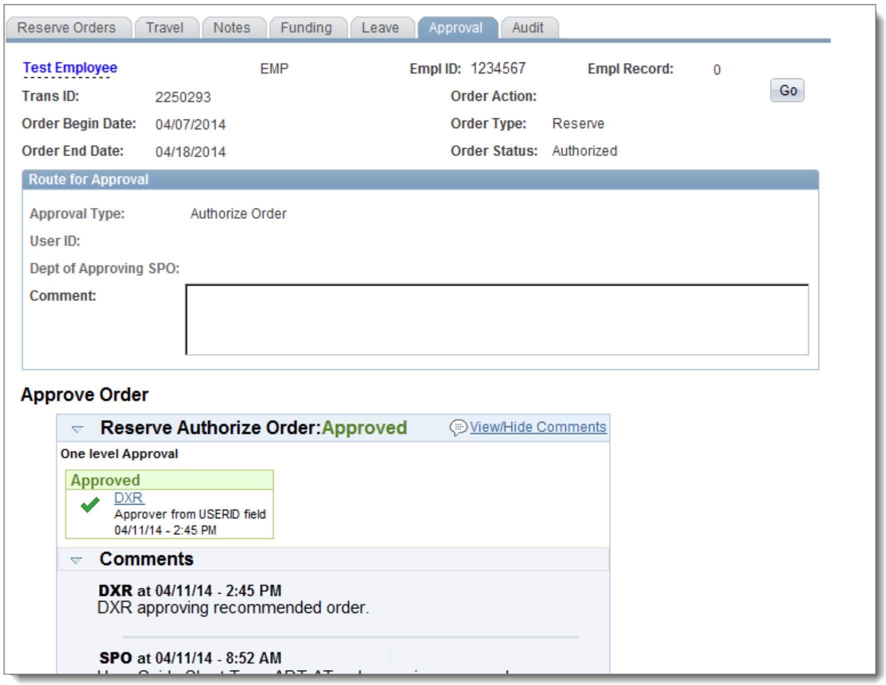


Figure 113: Approved Recommended Order

7. Click on the Funding tab to view the generated and approved TONO details.

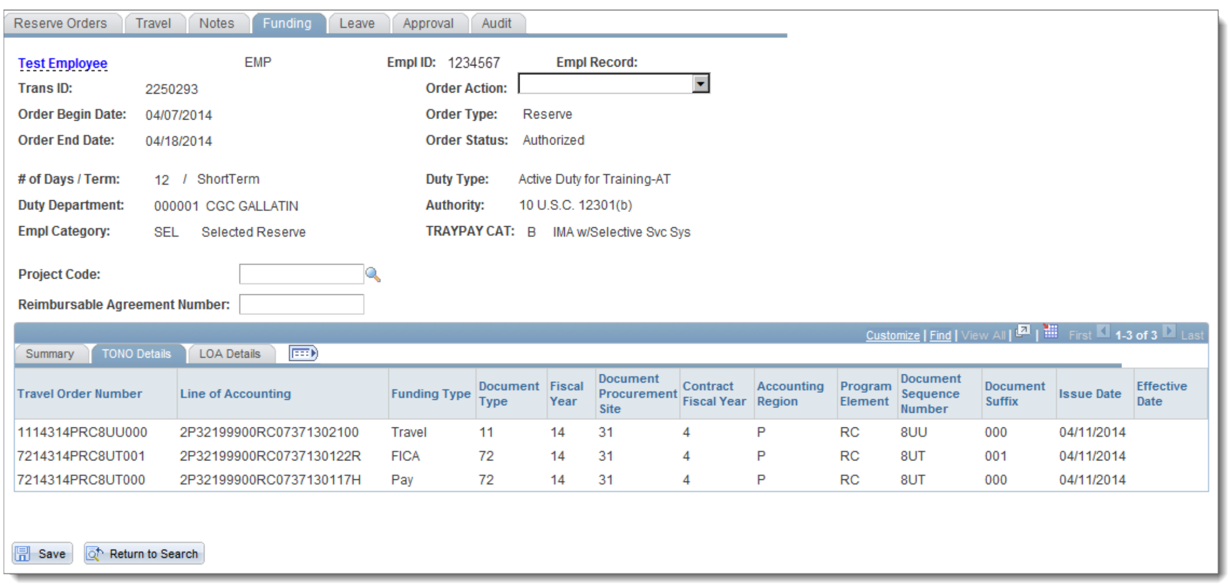


Figure 114: TONO Details

To review an Order, refer to section 8.6.1 Find/Review and Order (Including Audit).

8.5 Reserve Order Processes for SPO

8.5.1 Create an Order (Short Term)

The Reserve Orders page can be accessed by navigating to the following menu path from the portal homepage in the Reserve Administration pagelet.

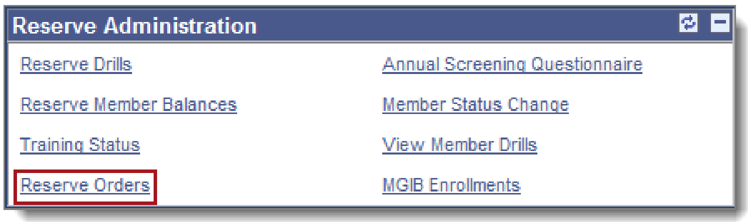


Figure 115: Reserve Orders Link

1. For this example, a Short Term ADT-AT order with a Single Travel Claim will be created. All of the fields on this tab are required to be filled out to add a new order.

2. Click Add a New Value tab and enter the member's EmplID.

3. The Empl Rcd and Trans ID are defaulted to 0.

4. Select the Duty Type from the drop down.

5. Use the calendar tool to select a Begin Date.

6. Use the calendar tool to select an End Date.

7. Click Add.

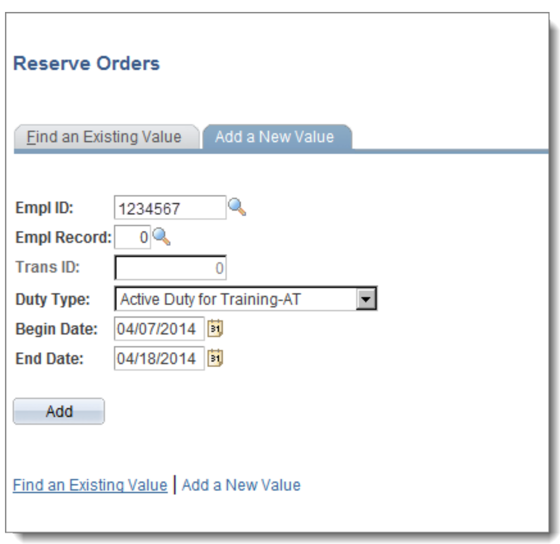


Figure 116: Add a New Value

8. The Reserve Order page will display. The Trans ID will display 0 since the order has not been created. The order will be created once the fields have been filled, the order has been saved and the Trans ID has been generated. The Route for Authorization button will become available after the order has been saved.

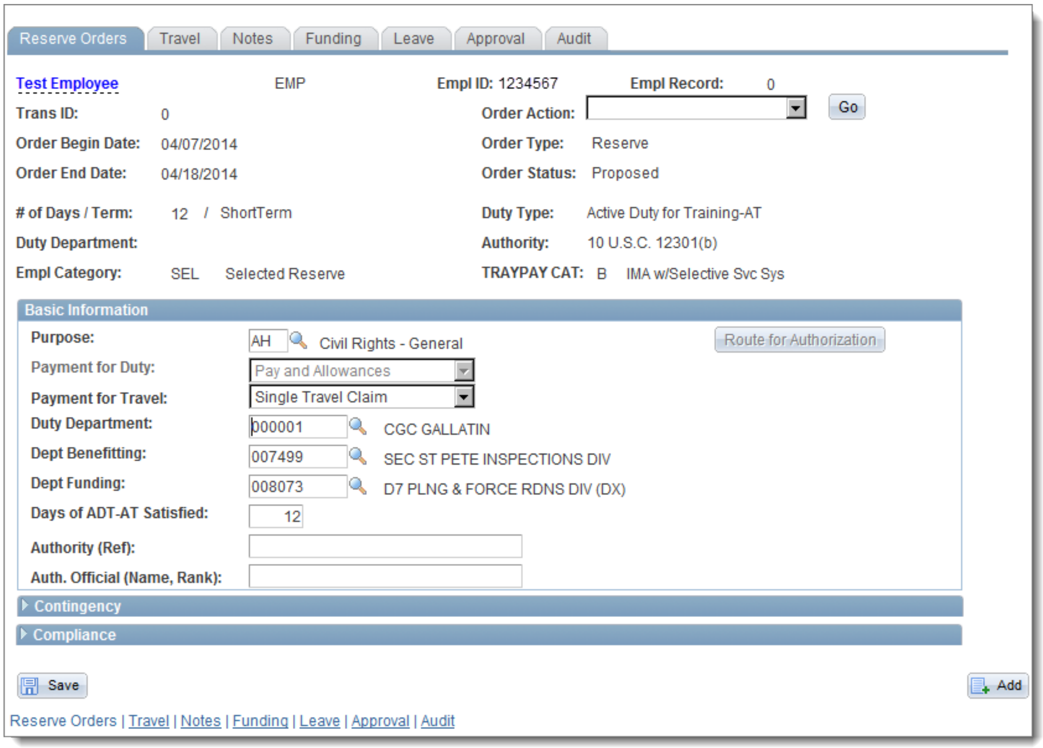


Figure 117: Reserve Orders Page

9. Select a Purpose using the lookup tool.

10. The Payment for Duty for an ADT-AT order is defaulted to Pay and Allowances and cannot be changed. This is different for each order type.

11. For Payment for Travel select Single Travel Claim.

12. Select a Duty Department using the lookup tool.

13. The Department Benefitting is defaulted to the member's current department from Job Data.

14. Select a Department Funding using the lookup tool.

15. The Days of ADT-AT Satisfied will be defaulted.

16. Enter a valid Authority Ref.

17. Enter a valid Authority Official.

18. The Contingency section is collapsed for orders not requiring a contingency.

19. The Compliance section is collapsed at all times, click on the section to validate that the order is compliant. Orders that are non-compliant cannot be routed for authorization.

20. Click Save. The Trans ID will generate.

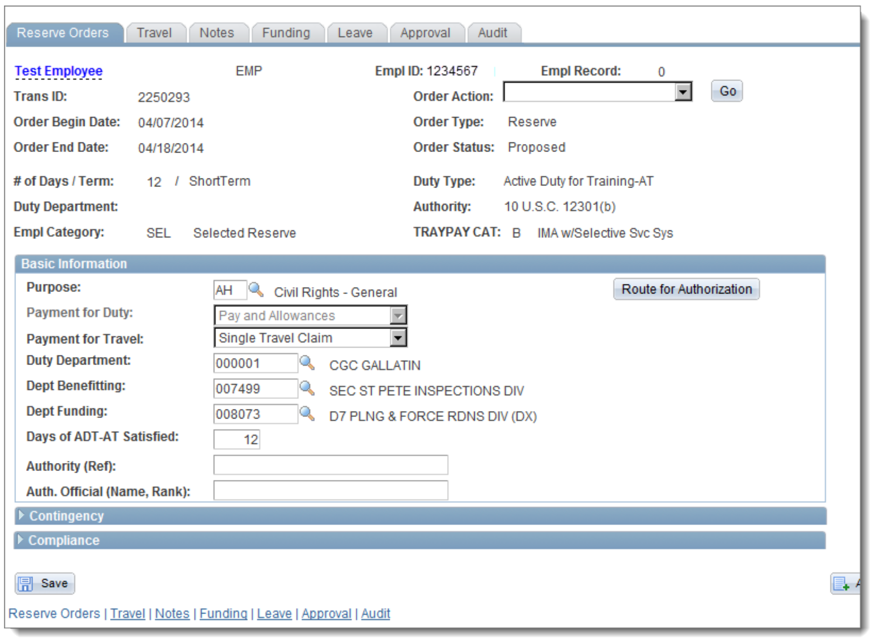


Figure 118: Saved Order

21. Click on the Travel tab and review the travel itinerary and make any updates to travel and click Save.

22. Click on the Notes tab, refer to section X. Make any changes and click Save.

8.5.2 Create an Order with Contingency

1. To submit an order request for a long term ADOS-AC order with a contingency, navigate to the order page from the portal homepage using the Reserve Order link in the Reserve Administration pagelet.

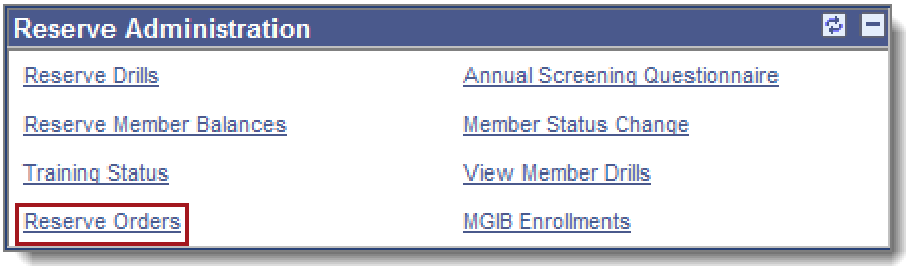


Figure 119: Reserve Orders Link

2. Click on Add a New Value.

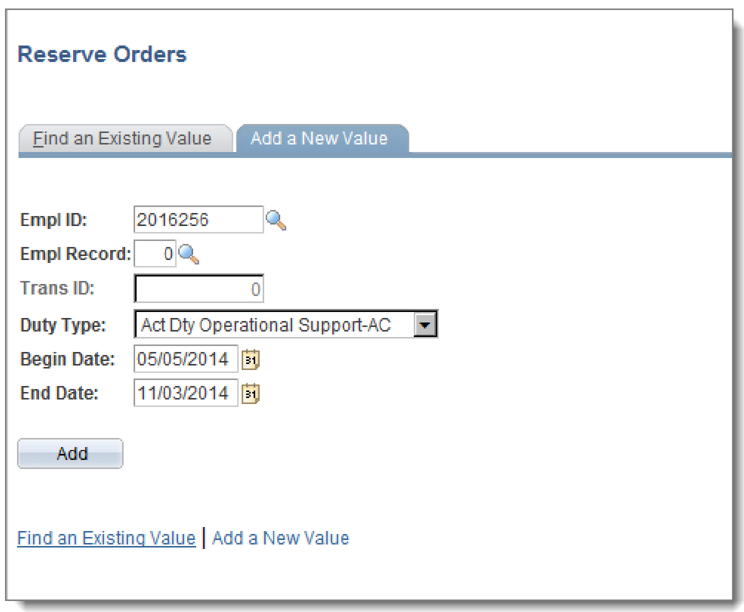


Figure 120: Add a New Value

3. Click Add a New Value tab and enter the member's EmplID.

4. The Empl Rcd and Trans ID are defaulted to 0.

5. Select the Duty Type from the drop down.

6. Use the calendar tool to select a Begin Date.

7. Use the calendar tool to select an End Date.

8. Click Add.

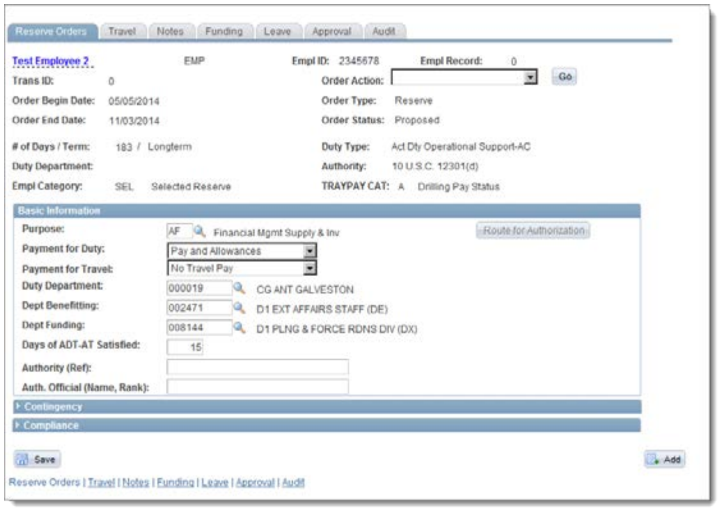


Figure 121: ADOS-AC Reserve Order

9. The Reserve Order page will display. The Trans ID will display 0 since the order has not been created. The order will be created once the fields have been filled, the order has been saved and the Trans ID has been generated. The Route for Authorization button will become available after the order has been saved.

10. Select a Purpose using the lookup tool.

11. The Payment for Duty for an ADT-AT order is defaulted to Pay and Allowances and cannot be changed. This is different for each order type.

12. For Payment for Travel select Single Travel Claim.

13. Select a Duty Department using the lookup tool.

14. The Department Benefitting is defaulted to the member's current department from Job Data.

15. Select a Department Funding using the lookup tool.

16. The Days of ADT-AT Satisfied will be defaulted.

17. Enter a valid Authority Ref.

18. Enter a valid Authority Official.

19. Expand the Contingency section.

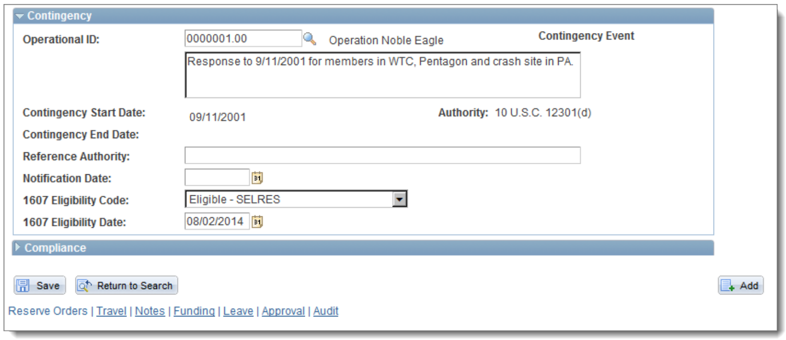


Figure 122: Contingency

20. Select an Operational ID using the lookup tool.

21. The remainder fields will auto-generate upon selecting an operational ID.

22. The Contingency Start Date is the effective date for the contingency.

23. The Contingency End Date is the date until which the contingency is effective till.

24. Enter the Reference Authority.

25. Enter the Notification Date.

26. The 1607 Eligibility Code displays if the member is eligible for this contingency.

27. The 1607 Eligibility Date is the date until which the member is eligible for this contingency which is the end date of the order.

28. The Compliance section is collapsed at all times, click on the section to validate that the order is compliant. Orders that are non-compliant cannot be routed for authorization.

29. Click Save. The Trans ID will generate.

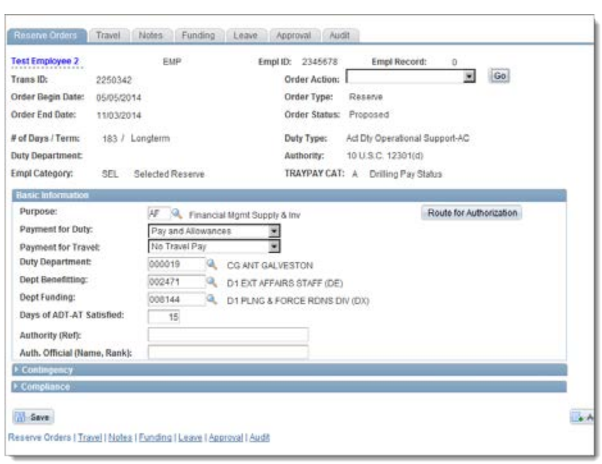


Figure 123: Saved Order

8.5.3 Create an EAD Order Using Member Form

1. To create an EAD order using the Member Form from Assignments, for the portal homepage click on the Member Form link in the Assignments pagelet.

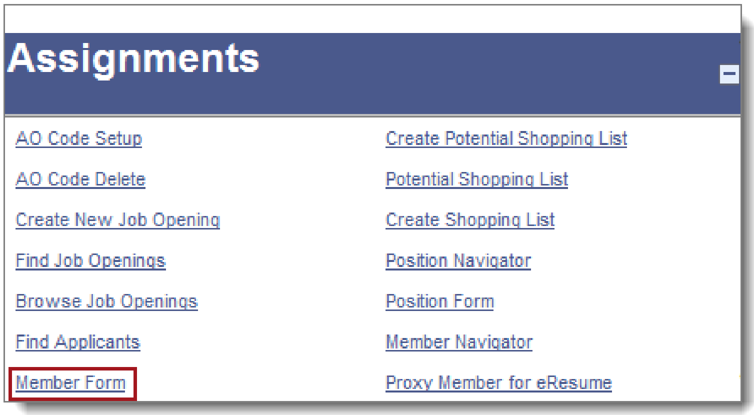


Figure 124: Member Form

2. Enter the EmplID of the member for whom the EAD order is to be created. The member must be in a Proposed Status in order to create the EAD order.

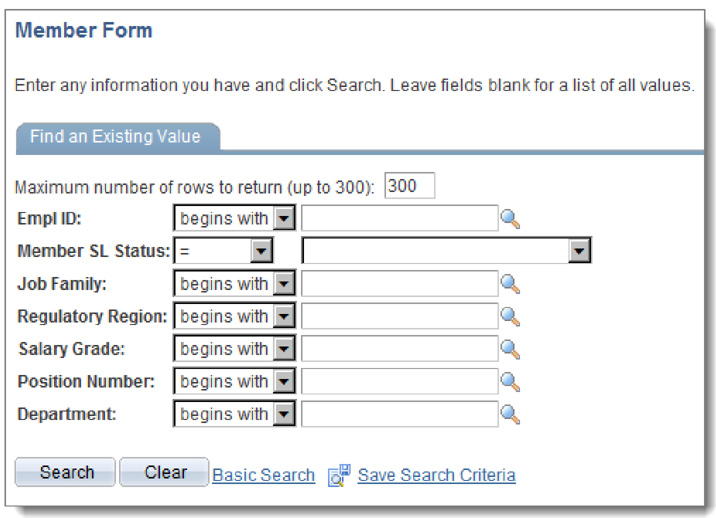


Figure 125: Member Form Search Page

3. Click on the Make Assignment link on the Member Form.

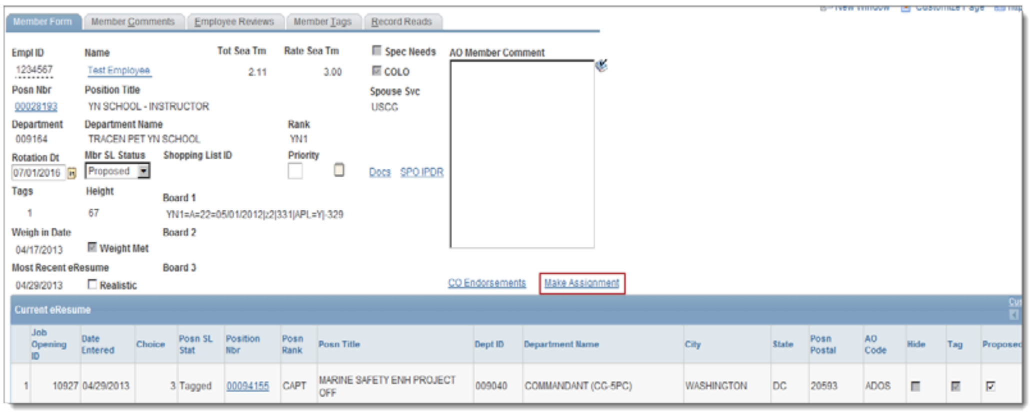


Figure 126: Make Assignment Link

4. Scroll over and click Add Order.

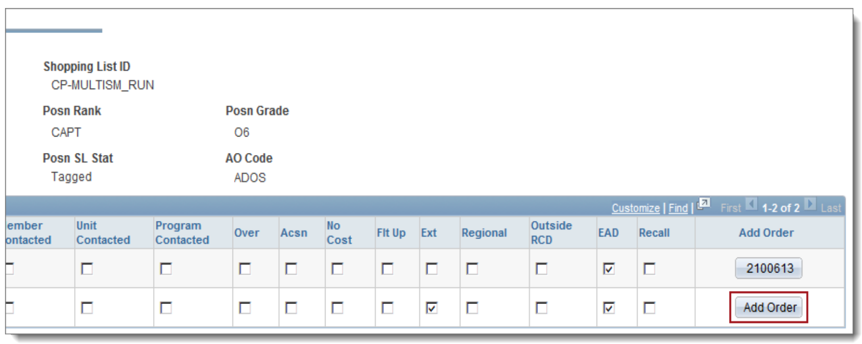


Figure 127: Add Order

5. This will navigate to the Reserve Orders component where the EAD order will be created.

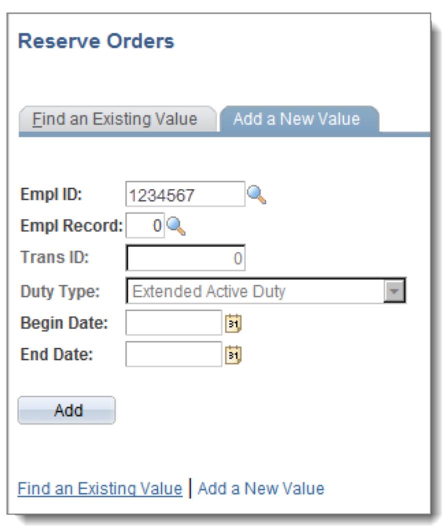


Figure 128: Reserve Orders Component

8.5.4 Submit an Order to DXR for Authorization

1. To submit an order for authorization, from the portal homepage navigate to the Reserve Orders page using the following path: Home> Reserve Administration> Reserve Orders.

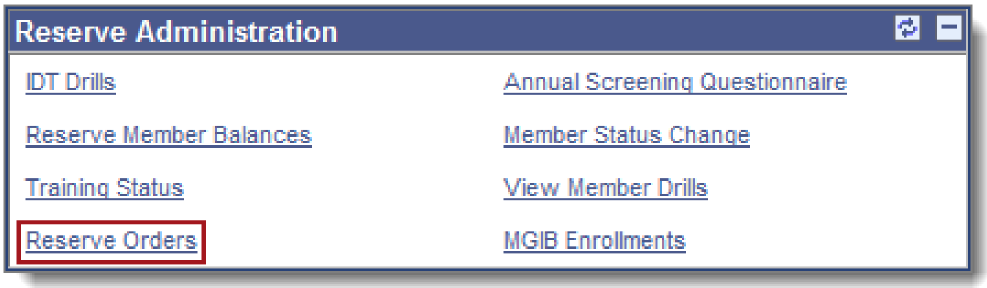


Figure 129: Reserve Orders

2. Enter the TransID of the order requiring authorization and click Search.

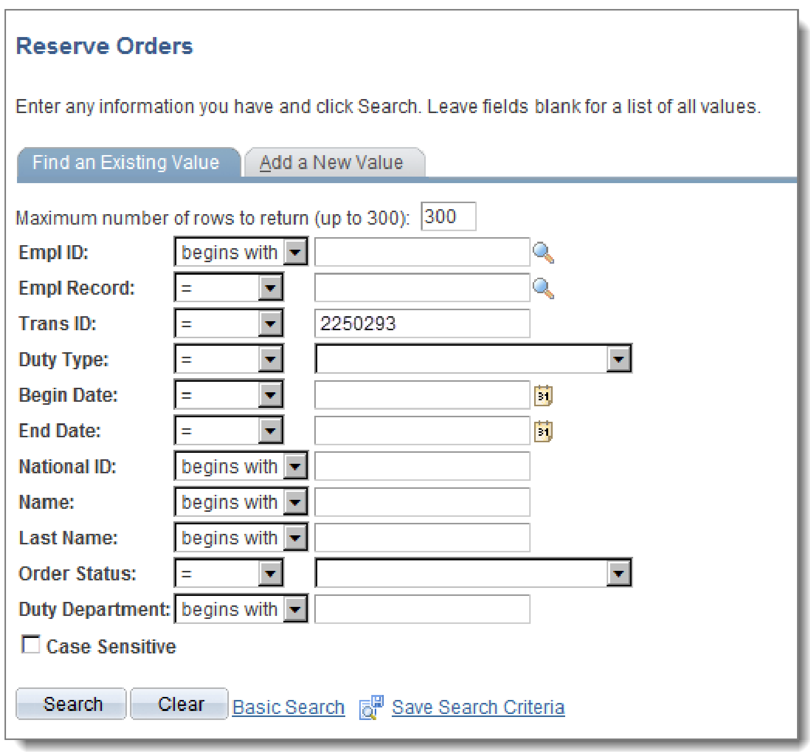


Figure 130: Reserve Orders Search Page

3. The order will display. Click Rout for Authorization.

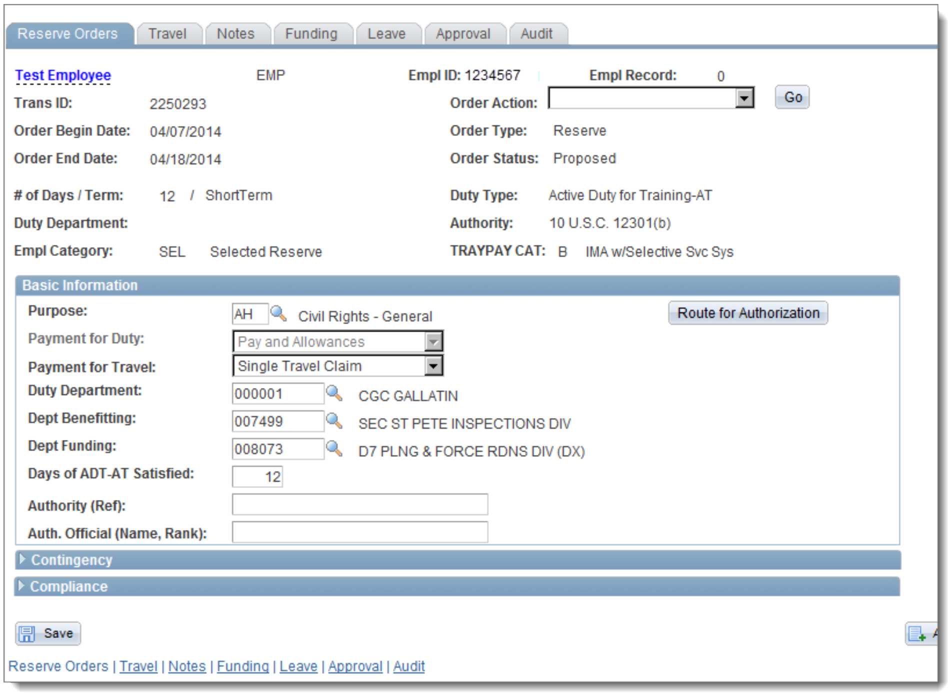


Figure 131: Saved Order

4. Enter the user ID of the approving SPO using the lookup tool. The name matching the EmpID will generate.

5. Enter comments. An order cannot be submitted for authorization or approval without comments.

6. Click Submit. The AWE will be created and the approval status of the order will be displayed along with any comments.

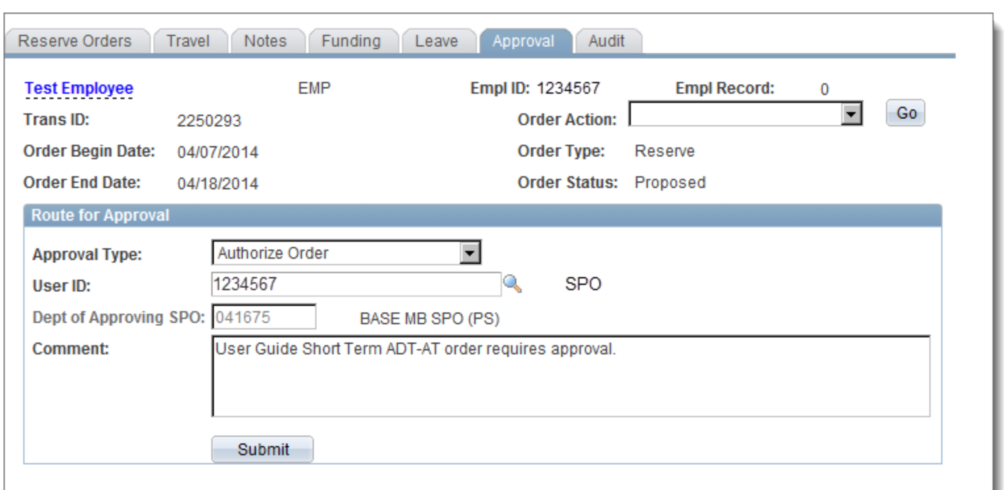


Figure 132: Route for Authorization ADT-AT

8.5.5 Submit Travel details

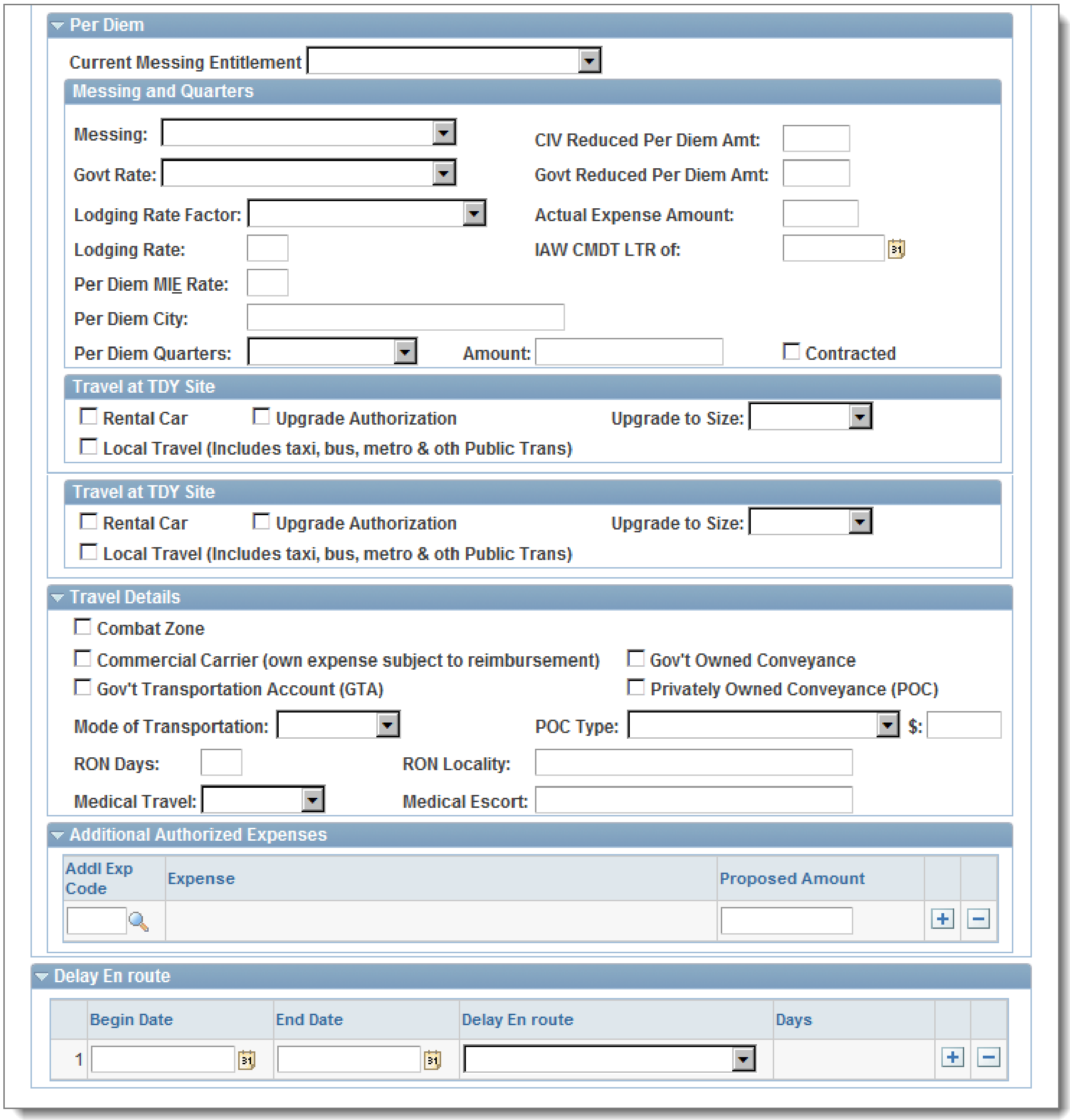


Figure 133: Travel Details

8.5.6 Depart/Report Endorsements

1. Navigate to the Reserve Orders link and access the order.

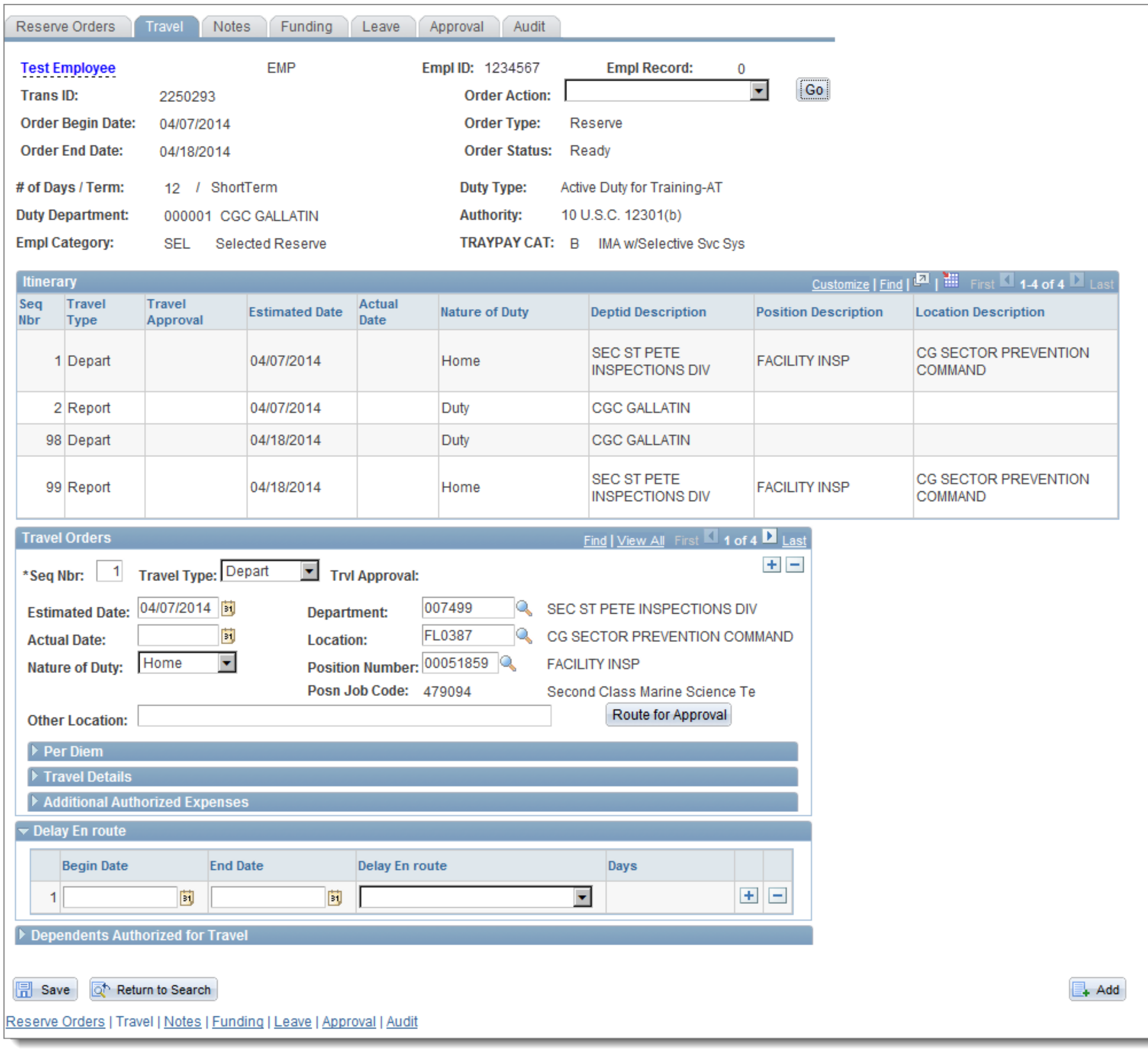


Figure 134: Order Depart

2. In the Travel Orders section for sequence number 1, enter the actual date which the member departed. Verify the Nature of Duty, Department, Location and Position Number for the Depart row.

3. Click Route for Approval.

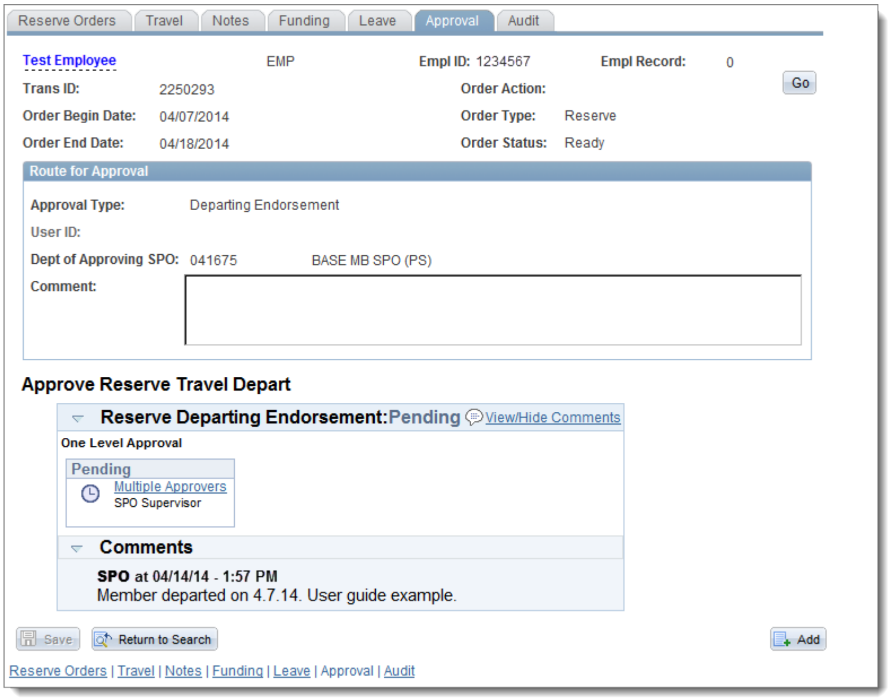


Figure 135: Depart Endorsement Approval

4. Enter comments.

5. Click Submit. The depart endorsement is now awaiting approval from the SPO Supervisor.

To submit Report endorsement, repeat the steps 1 – 3 for Submit Depart Endorsement.

8.5.7 Multiple Endorsements

This can be used to report a member when (Row 1) Departure and (Row 2) Report have not been submitted. The SPO can submit a multiple endorsement in lieu of submitting an endorsement for depart and report separately. This will allow the SPO Supervisor to approve row 1 and row 2 of the travel order in one transaction.

1. Navigate to the Reserve Orders link and access the order.

2. Fill out row 1 and 2 of the travel orders.

3. Click Route for Approval on row 2 or the maximum row submitting for approval.

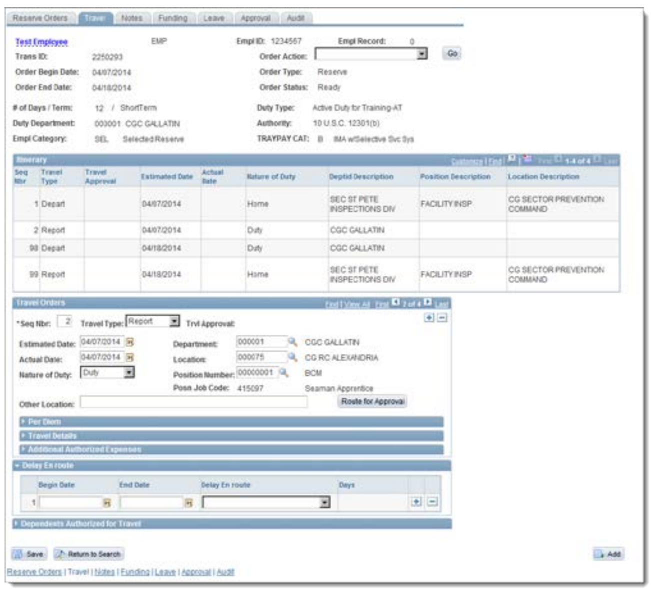


Figure 136: Multiple Endorsements Report to Duty

4. The Comment box will display a comment on the sequence number that requires approval. Click Submit.

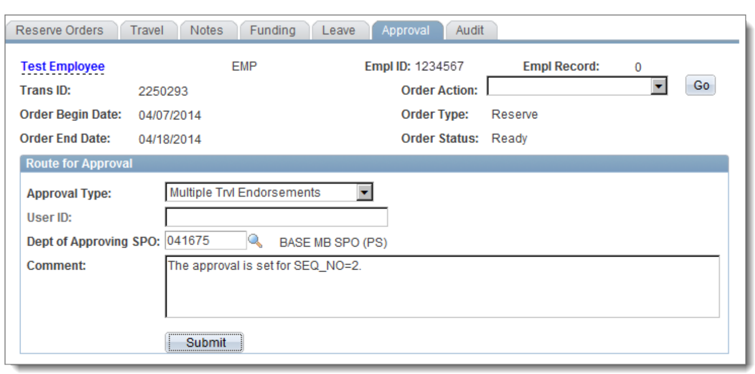


Figure 137: SEQ_NO 2 Approval

Once the SPO Supervisor approves the multiple endorsements, the order status will update to Enroute.

This method can also be applied to when the member report to the final home location, the SPO can request a multiple endorsement which will allow the SPO Supervisor to approve rows 1 – 4 for travel orders.

5. Navigate to the Reserve Orders link and access the order.

6. Fill out lines 1 and 2 of the travel orders.

7. Click Route for Approval.

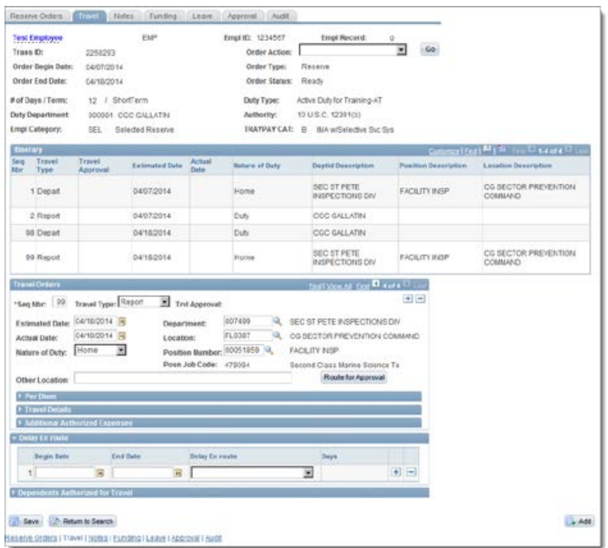


Figure 138: Multiple Endorsement Line 99

8. The Comment box will display a comment on the sequence number that requires approval. Click Submit.

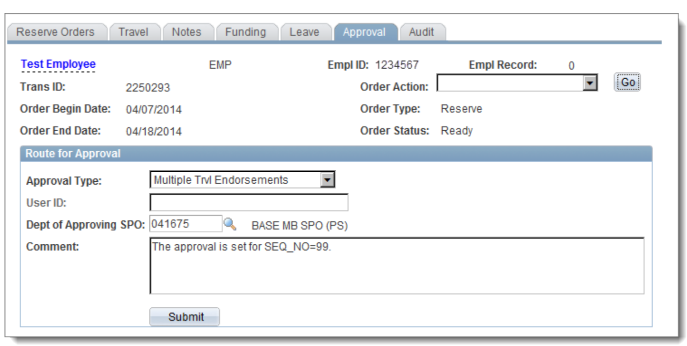


Figure 139: Approval for SEQ_NO 99

Once the SPO Supervisor approves the multiple endorsements, the order status will update to Finished.

8.5.8 SPO Supervisor Approving Request

1. To approve an endorsement, click on Requests from the Portal Homepage.

Figure 140: Requests

2. Click on View My Requests (all types).

Figure 141: View My Requests

3. Select the radio button for Request I am Approver for and click Populate Grid.

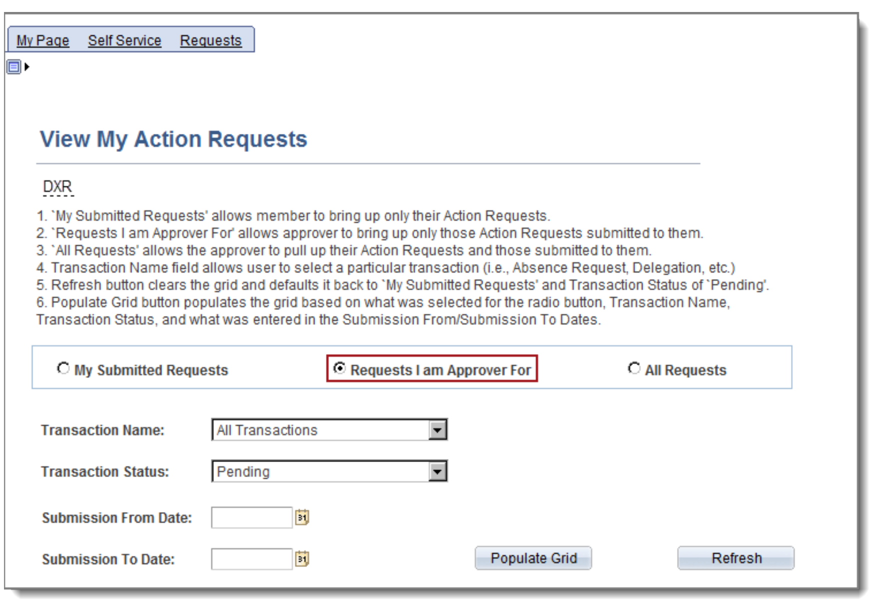


Figure 142: Populate Grid

4. The grid will display a list of all transactions that require approvals. Click on the Approve/Deny link.

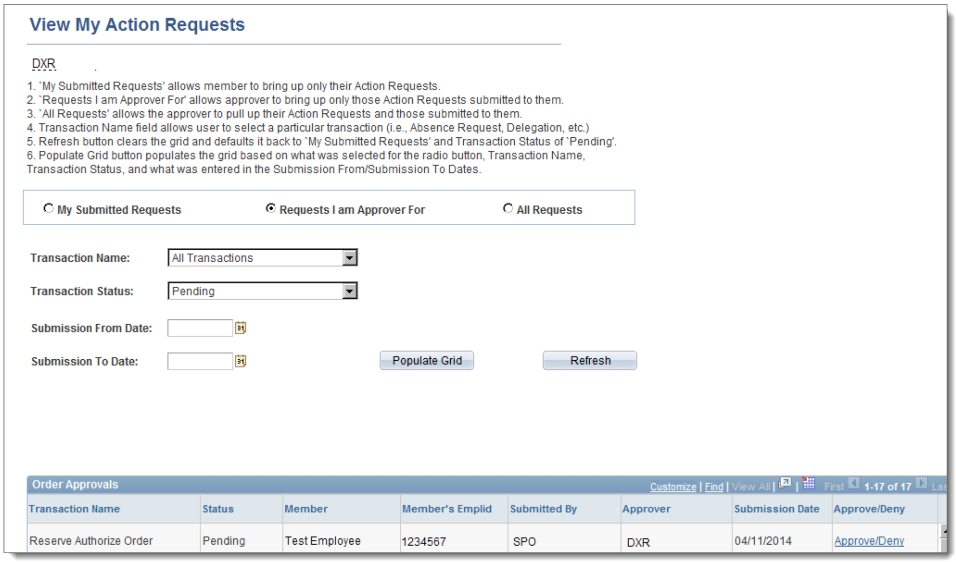


Figure 143: Transaction List

5. The order page will display. Enter comments and click Approve.

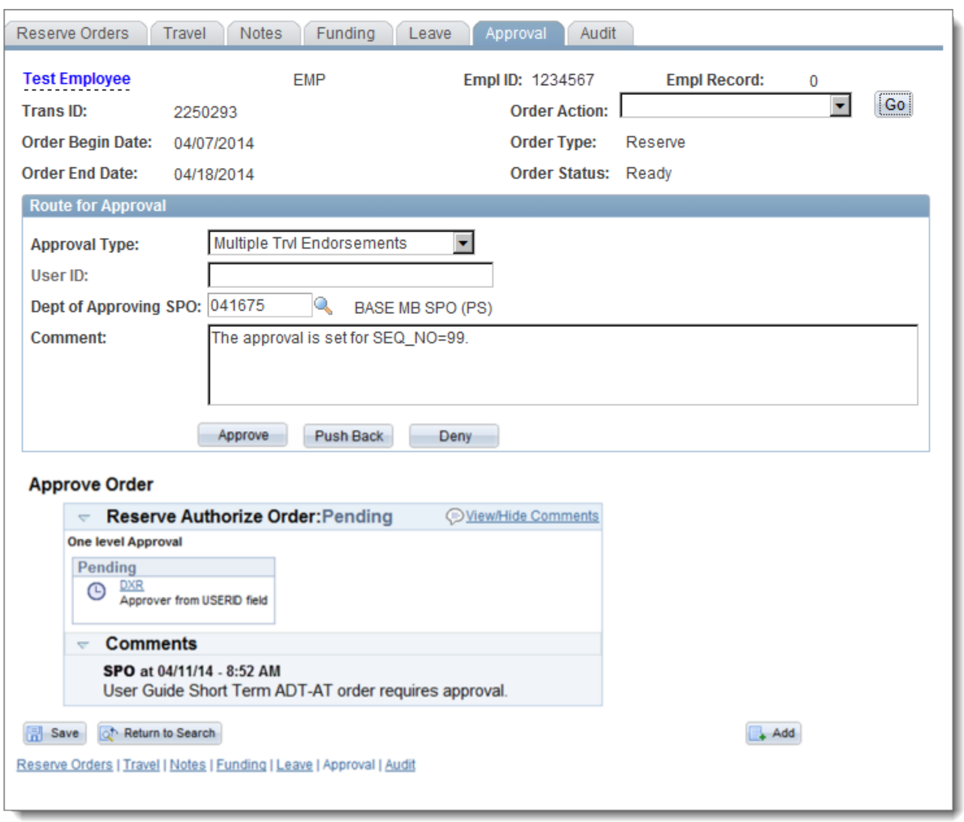


Figure 144: Approving Recommended Order

6. Once the order and TONO has been approved, the Order Status field will update to Authorized. The AWE will update with the new approved status. The order will now be displayed in the Airport Terminal.

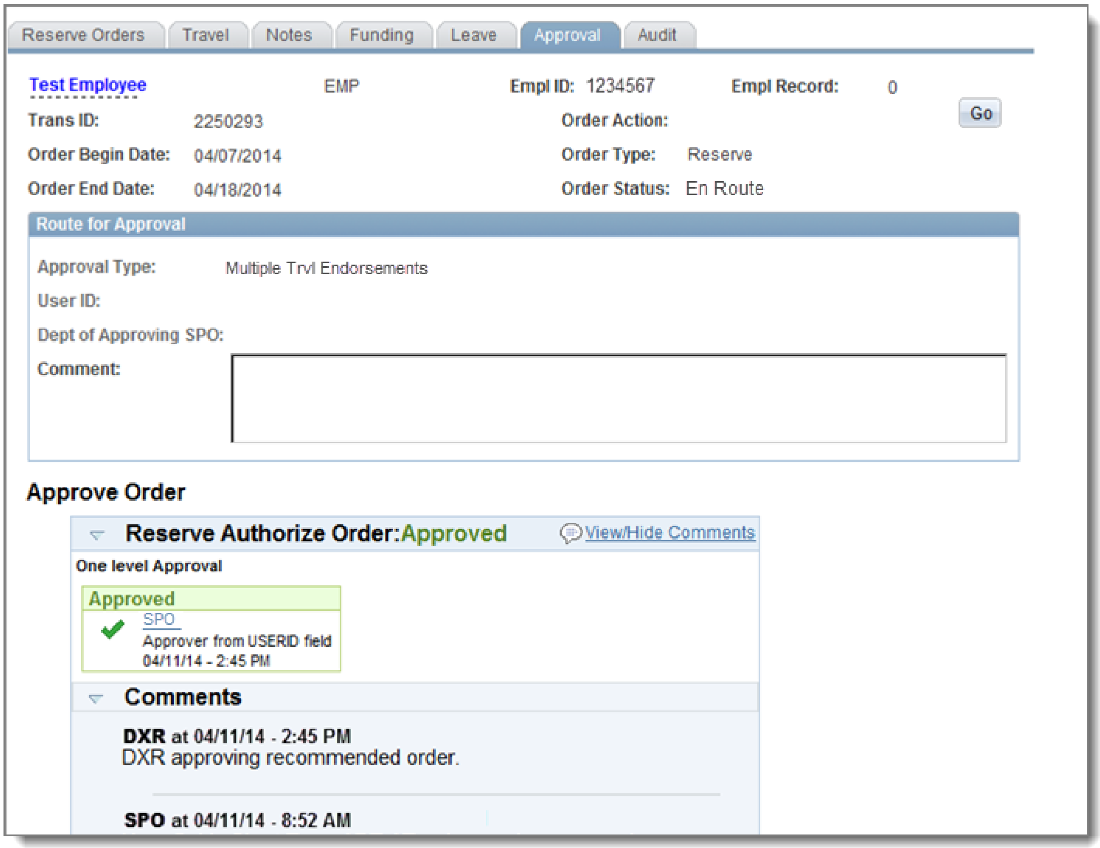


Figure 145: Approved Recommended Order

8.5.9 Finish an Order

There are three methods used to finish an order which are Manual, RELAD and Order Processing App Engine.

The Manual method is used to finish short term orders and back to back orders. To manually finish an order the following actions must be completed.

- All travel rows must be approved
- All actual dates must be filled in
- Order status is set to finish

All long term orders, except for those that are back to back, must use Separation Order with RELAD to be marked finished.

To finish a Long Term order using the RELAD method the Separation component will run a daily batch process and pick up the Long Term orders and mark the Order Finished by performing the following actions:

- Use the Trans ID on the Long Term order to create a RELAD with the same TransID

- It will set the Order End Date on the Long Term order to the Separation Order

- It will set the date of the last report row to the Separation Date

- For any other report rows, the system will set the actual dates to estimated dates

- On the Long Term order travel page it will set the location, department and position to the one that is listed on the Separation order

- It will mark all Unapproved travel rows to Approved

- Finally, it will set the Long Term order status to Finished and create an Audit record for the Long Term order

The Order Processing App Engine run on a nightly basis and sets orders with an end date equal to or less than the current system date to finish. All of the travel rows are set to approve and the travel dates are filled in.

8.5.10 Amend an Order

Amending an order allows the SPO to change the order travel rows which include the order begin and end dates. Orders in a Proposed status cannot be amended.

To amend an order, search the order to be amended.

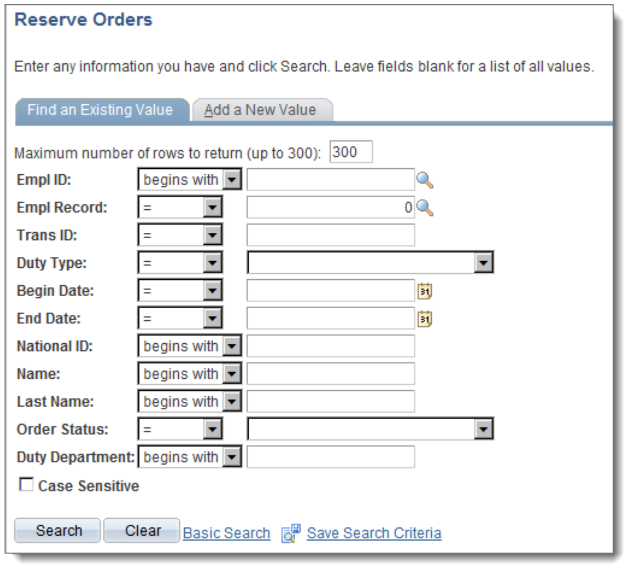


Figure 146: Search Order to Amend

Select the order action to Amend Order and click Go.

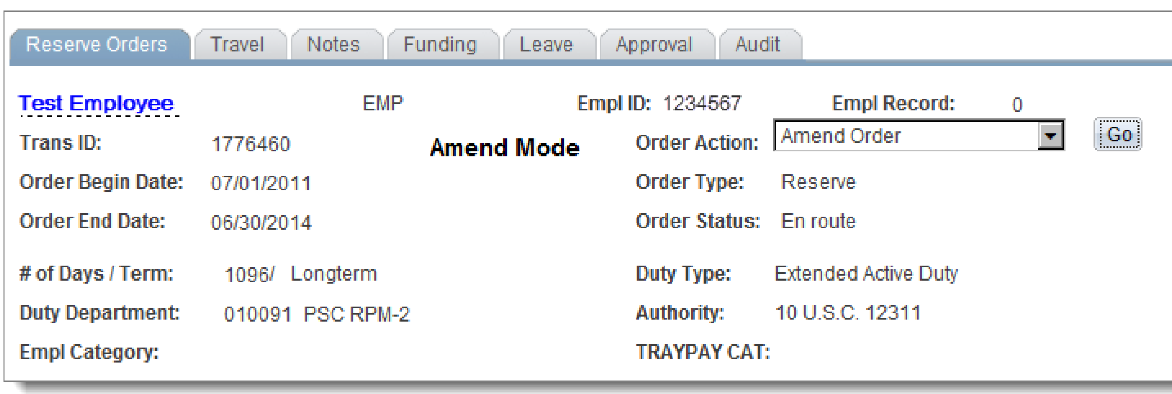


Figure 147: Amend Order

The fields that are allowed to be amended are now editable. Make the necessary changes. Making changes to the Actual Dates will update the order Begin Date /End Date, recalculate the duration of the order, the term and eligibility of the order.

The changes will not be saved until the approval request has not been submitted.

8.5.11 Cancel an Order

All orders can be cancelled and will need to go through an approval process upon doing so.

- Orders in a Proposed status can be cancelled but do not have to go through an approval process and will be cancelled immediately.
- Orders with an Enroute status when cancelled will have their pay group automatically changed.
- All leave associated with a cancelled order will be cancelled.

8.5.10.1 Cancel Order Without TONO

1. To cancel an order without TONO, search for the order to be cancelled.
2. In the Order Action drop down select Cancel Order and click Go.

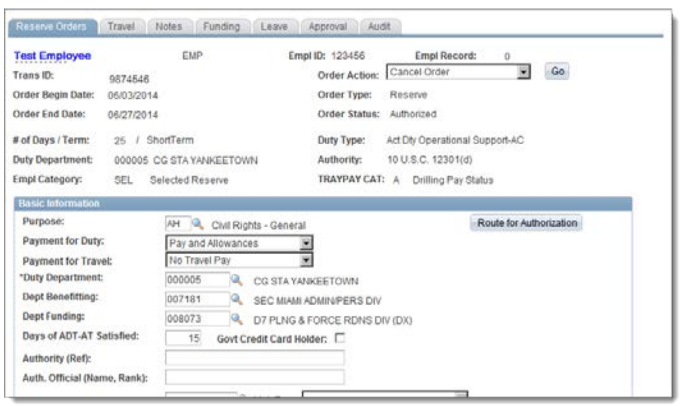


Figure 148: Cancel an Order

3. The Approval page is display. Enter comments and click Submit. The Order will be routed to approvers for cancellation.

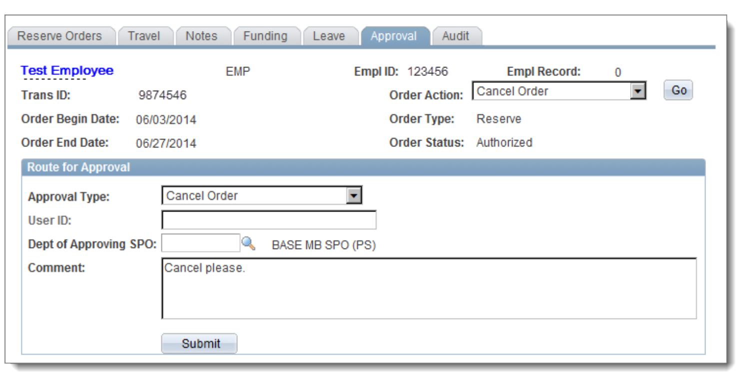


Figure 149: Cancelling an Order

4. The approver will then access the request from Request page and enter any comments and approve the request to cancel the order.

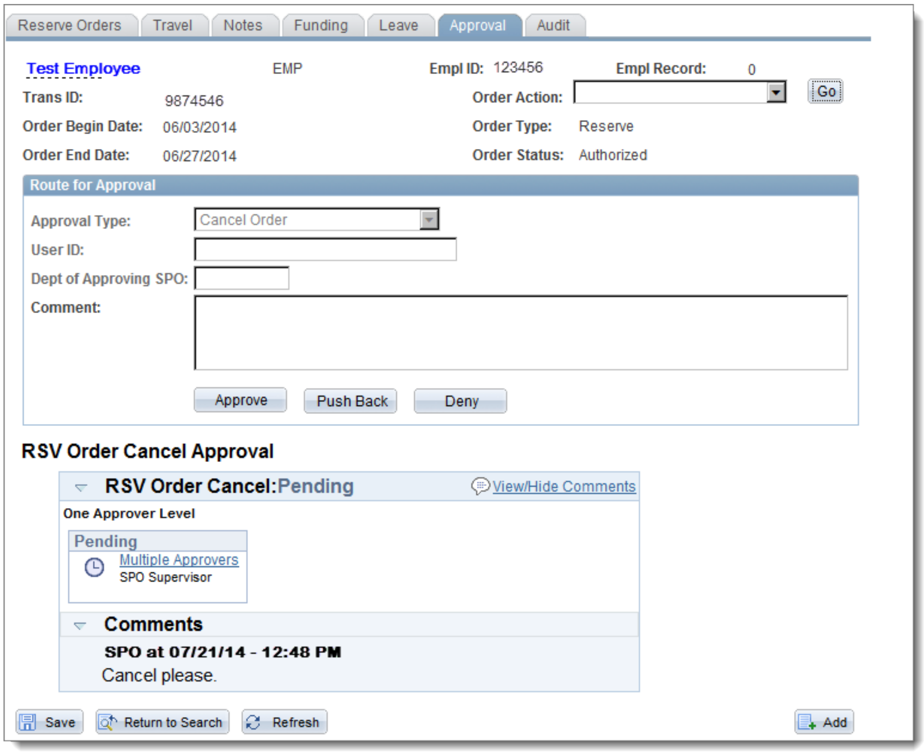


Figure 150: Approve Cancellation

5. Once the cancellation has been approved the AWE status and the Order Status will reflect the changes.

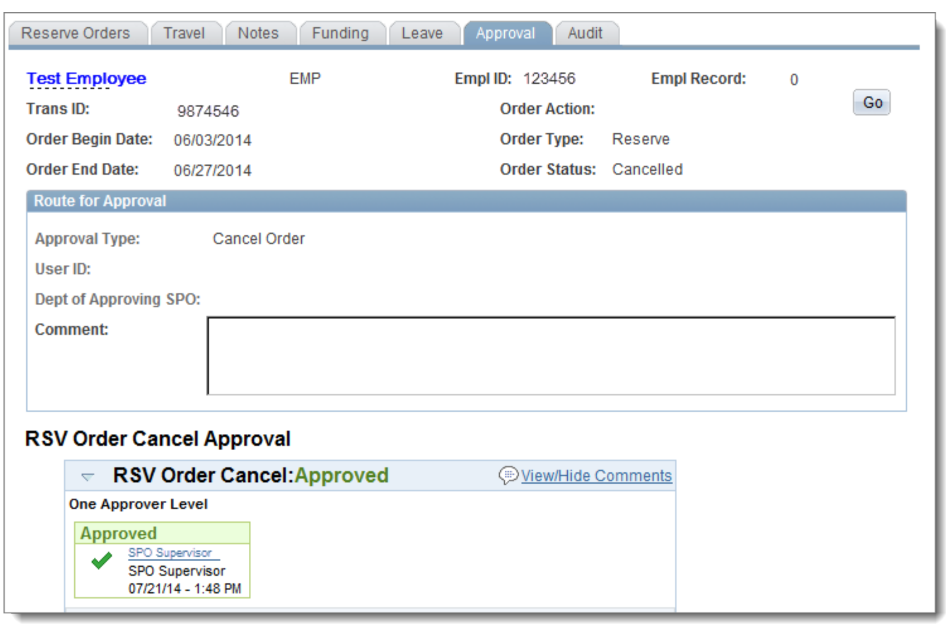


Figure 151: Cancelled Order

8.5.10.2 Cancel order With TONO

1. To cancel an Order with TONO, search and select the Order. In the Order Action drop down select Cancel Order with TONO and click Go.

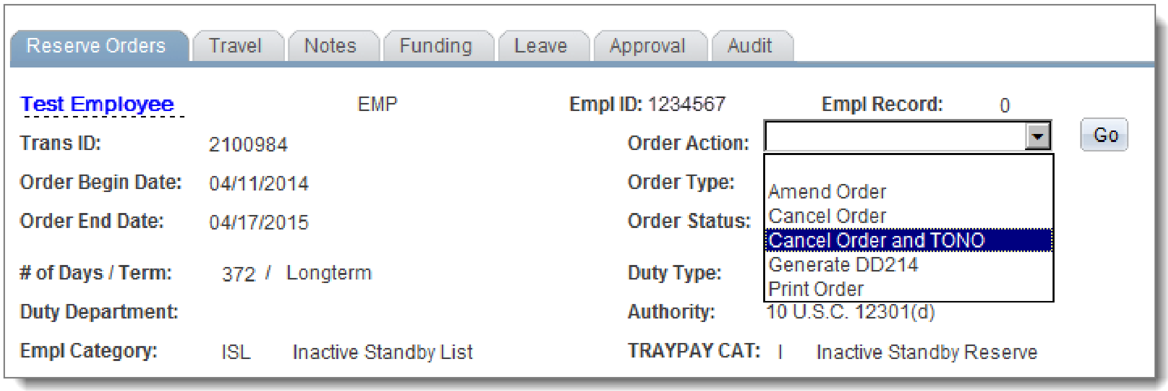


Figure 152: Cancel Order with TONO

2. The Approval page will display. Enter comments in the comments box. This Order will then be routed to the SPO to be processed for cancellation.

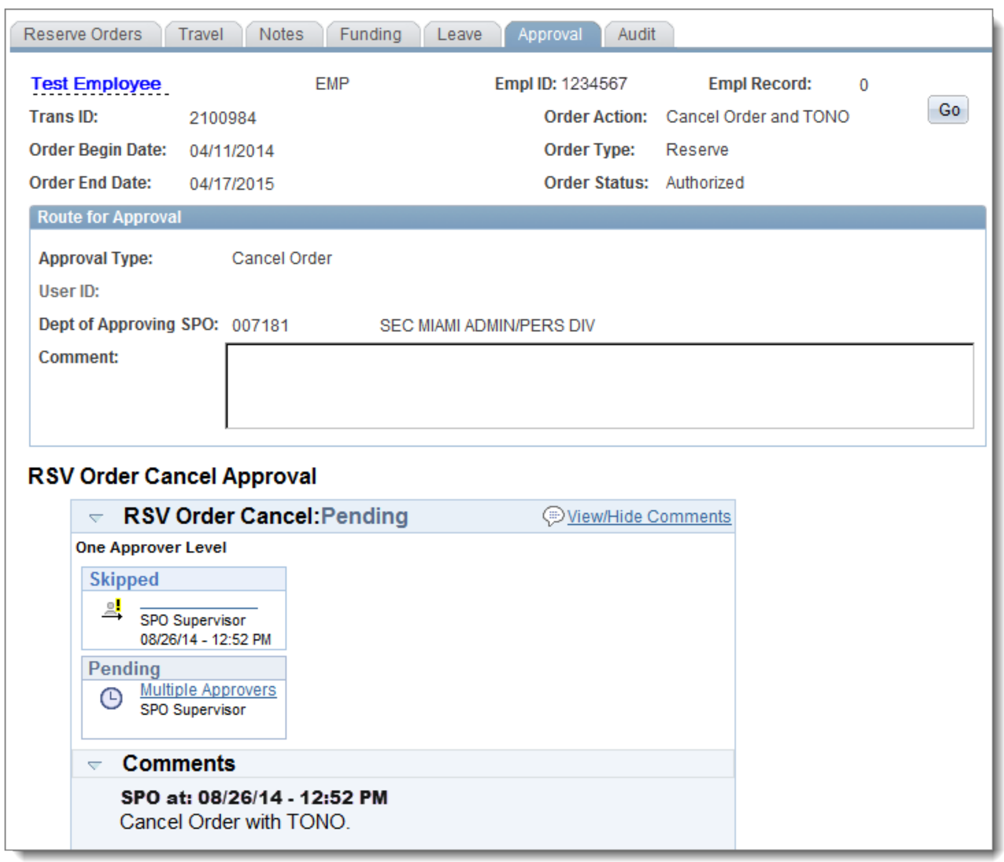


Figure 153: Submit Order with TONO for Cancellation

3. The Approving SPO will then access the order cancellation request by using the following navigation path: Home> Request> View My Request (all types).

   On this page select Request I am Approver for and click Populate.

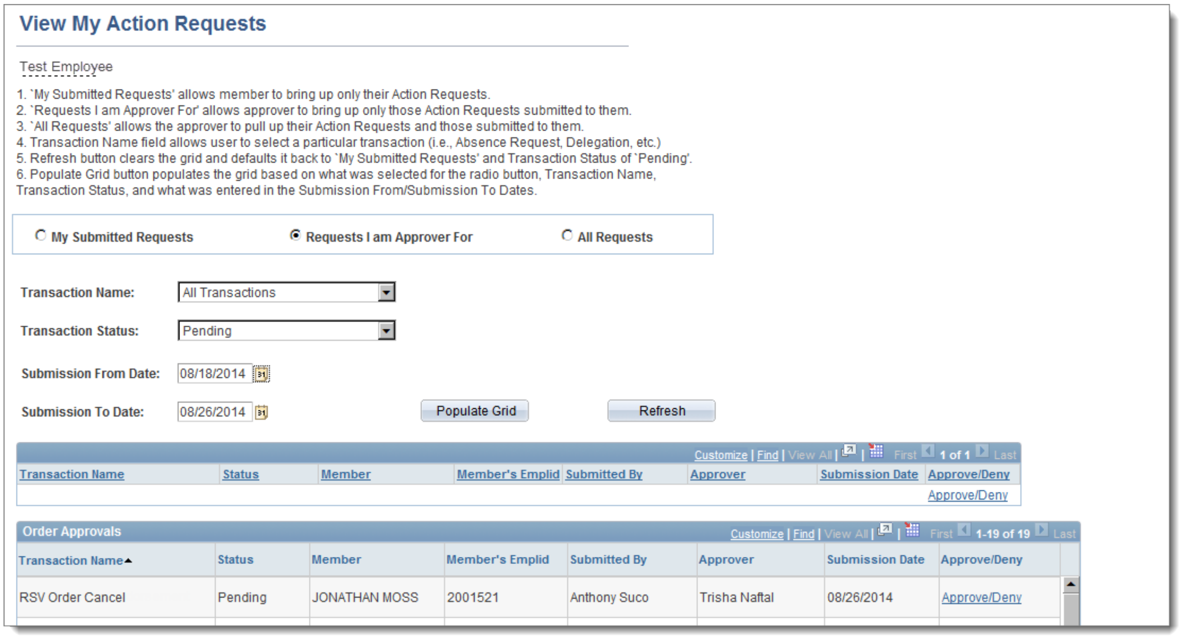


Figure 154: Select Order Cancellation Approval

4. On this page enter comments and click Approve.

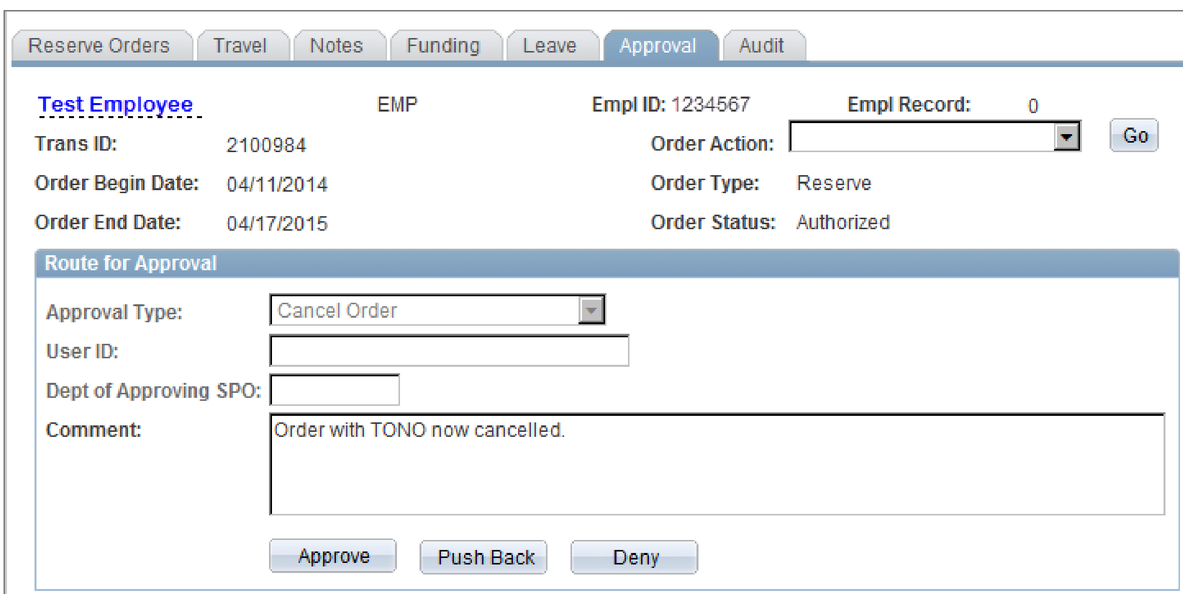


Figure 155: Approve Order Cancellation Request

The updated AWE status will display.

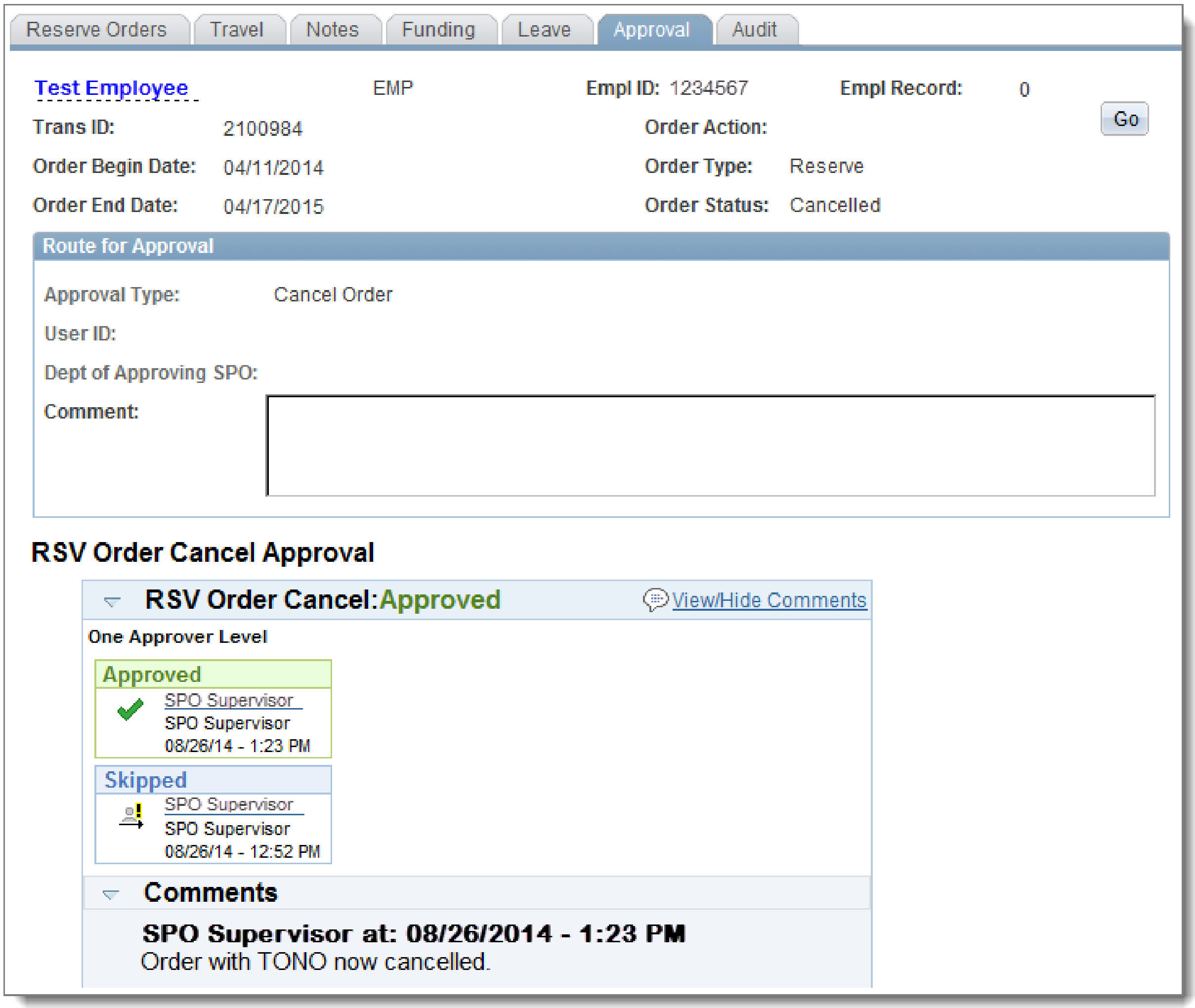


Figure 156: Updated SWE Status

The order will reflect the new order status.

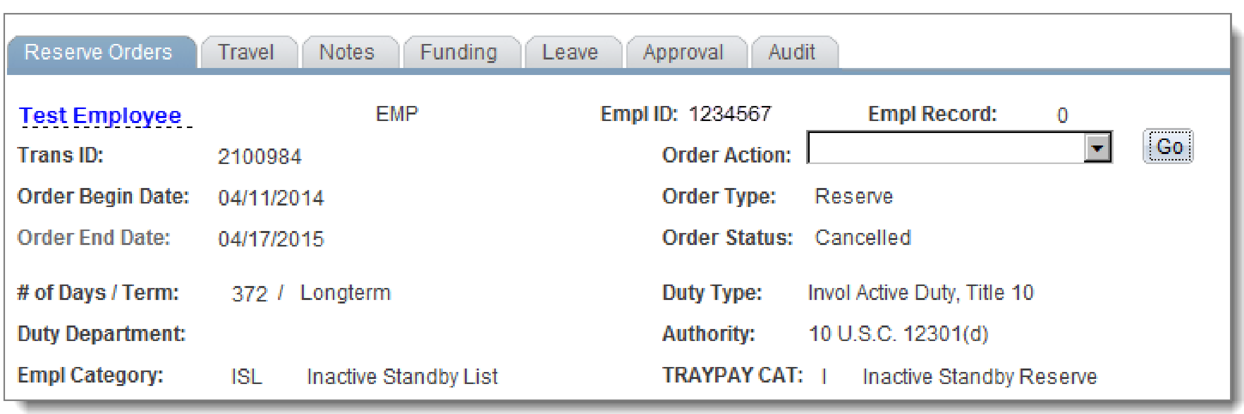


Figure 157: Cancelled Order with TONO

8.5.12 Linking an Order

A member who is currently on long term orders and has a new long term order be authorized immediately after the current order, they can be linked.

To link these types of order, create and authorize the order to be linked. Open the order. For the Linked Order (previous) use the lookup tool and select the previous order. In the Link Type drop down, select Back to Back. Click Save.

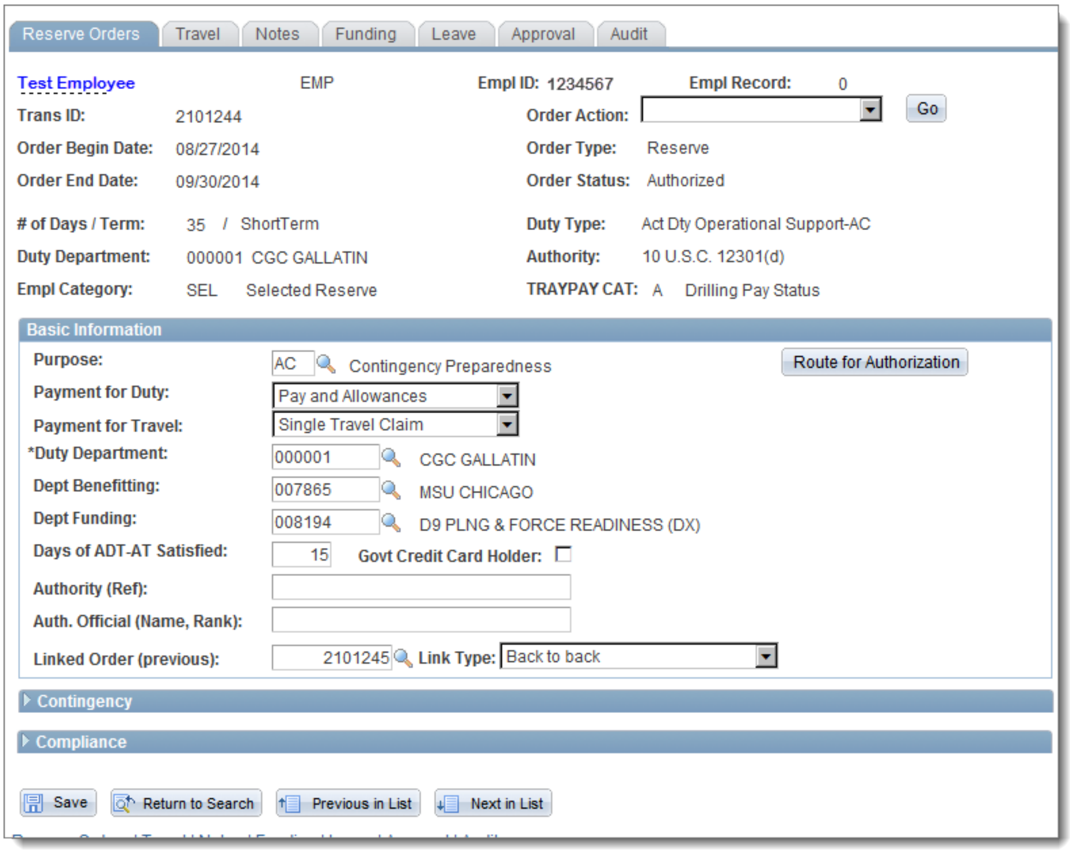


Figure 158: Link New Long Term Order

8.6 Common Order Processes

8.6.1 Find/Review an Order (Including Audit)

This section reviews each tab of the order and provides a description of the contents of each tab.

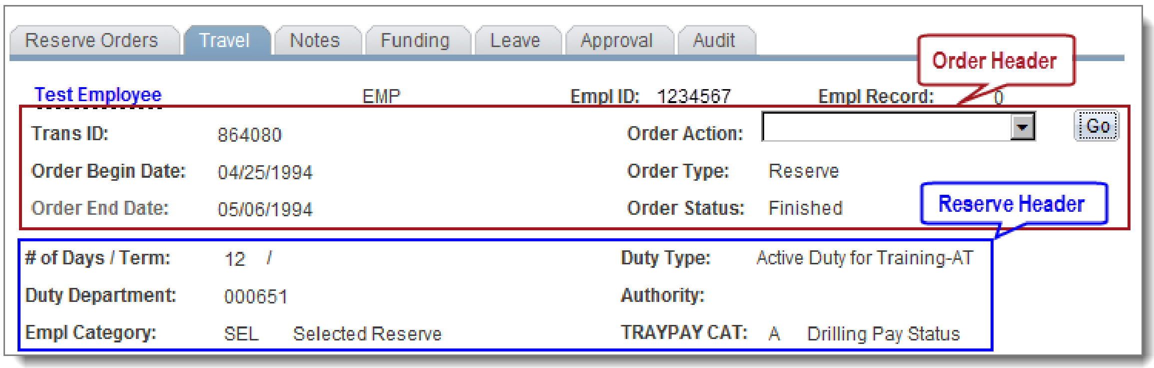


Figure 159: Reserve Order Tab

The Reserve Orders tab contains two headers, the order header and the reserve header. All of the fields in these two headers are view only. The order header is displayed on all of the order tabs while the order header is not.

The Order Action drop down menu allows users five different options. Users can print orders with the status of Authorized, Ready, En route and Finished. Orders with a status of Proposed and Cancelled cannot be printed.

The Order Action drop down also allows users to Amend an order, cancelled an Order and the TONO for an order can be cancelled.
The Basic Information section is where the details of the order are entered.

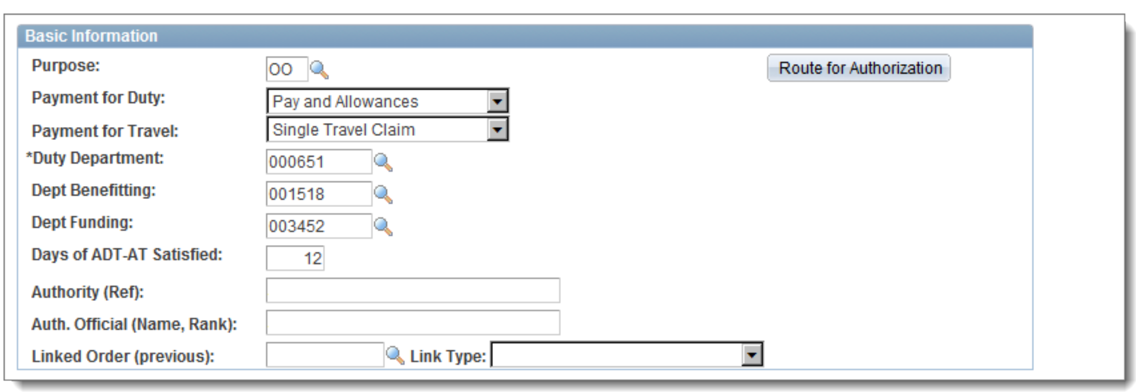
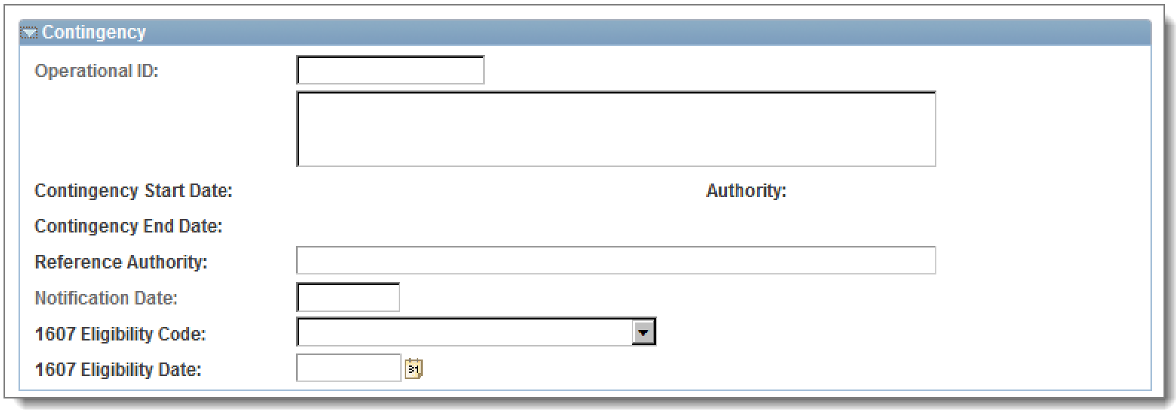


Figure 160: Basic Information

The Contingency section is where the order contingency is entered.



Contingency

Operational ID:

Contingency Start Date: Authority:

Contingency End Date:

Reference Authority:

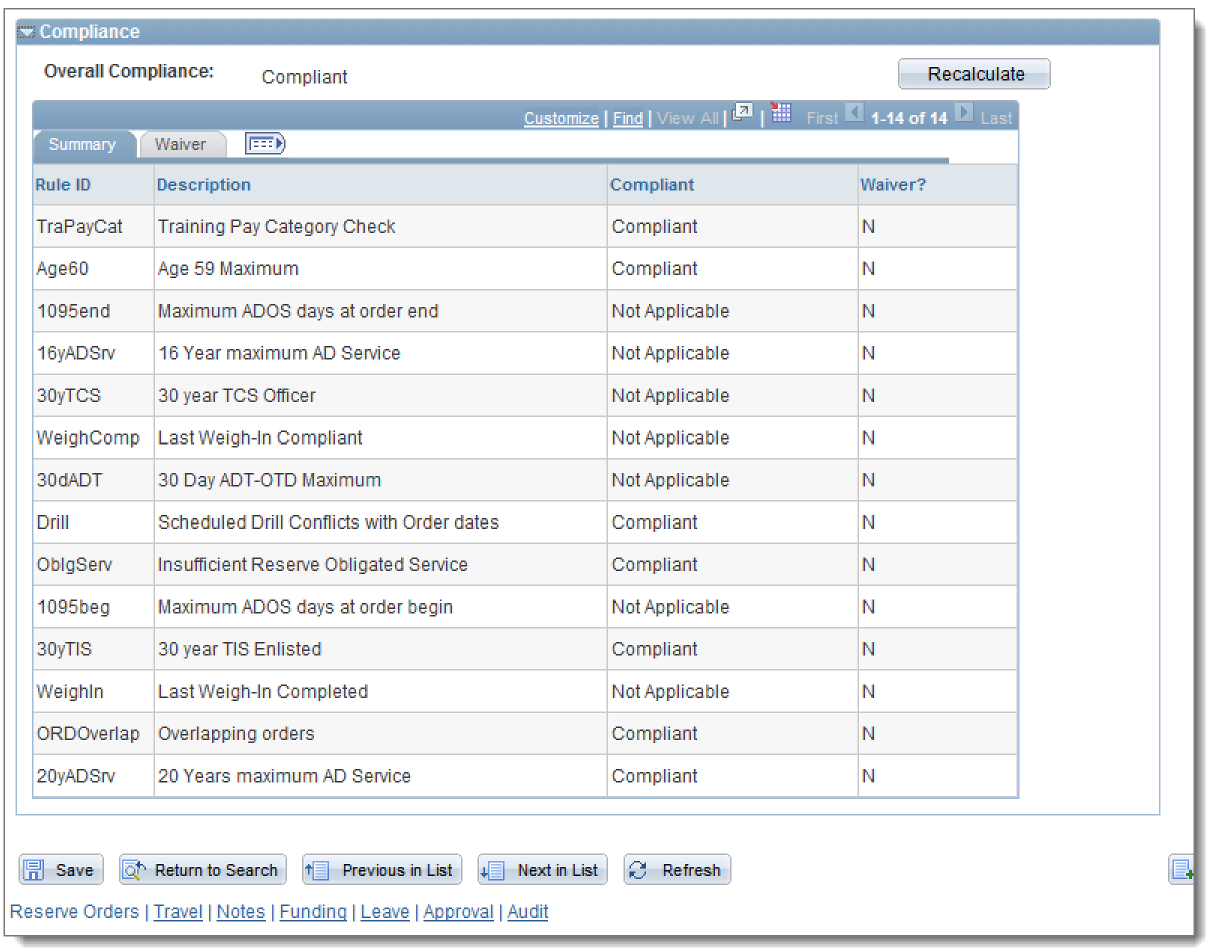
Notification Date:

1607 Eligibility Code:

1607 Eligibility Date:

Figure 161: Contingency

The Compliance section displays a list of compliance rules that are required to be compliant before the order can be routed for authorization.



Compliance

Overall Compliance: Compliant

Recalculate

Customize | Find | View All | First 1-14 of 14 Last

Summary Waiver

Rule ID	Description	Compliant	Waiver?
TraPayCat	Training Pay Category Check	Compliant	N
Age60	Age 59 Maximum	Compliant	N
1095end	Maximum ADOS days at order end	Not Applicable	N
16yADSrv	16 Year maximum AD Service	Not Applicable	N
30yTCS	30 year TCS Officer	Not Applicable	N
WeighComp	Last Weigh-In Compliant	Not Applicable	N
30dADT	30 Day ADT-OTD Maximum	Not Applicable	N
Drill	Scheduled Drill Conflicts with Order dates	Compliant	N
OblgServ	Insufficient Reserve Obligated Service	Compliant	N
1095beg	Maximum ADOS days at order begin	Not Applicable	N
30yTIS	30 year TIS Enlisted	Compliant	N
WeighIn	Last Weigh-In Completed	Not Applicable	N
ORDOverlap	Overlapping orders	Compliant	N
20yADSrv	20 Years maximum AD Service	Compliant	N

Save | Return to Search | Previous in List | Next in List | Refresh

Reserve Orders | Travel | Notes | Funding | Leave | Approval | Audit

Figure 162: Compliance

The Waiver tab of the compliance section displays any waivers that applicable to any of the compliance rules.

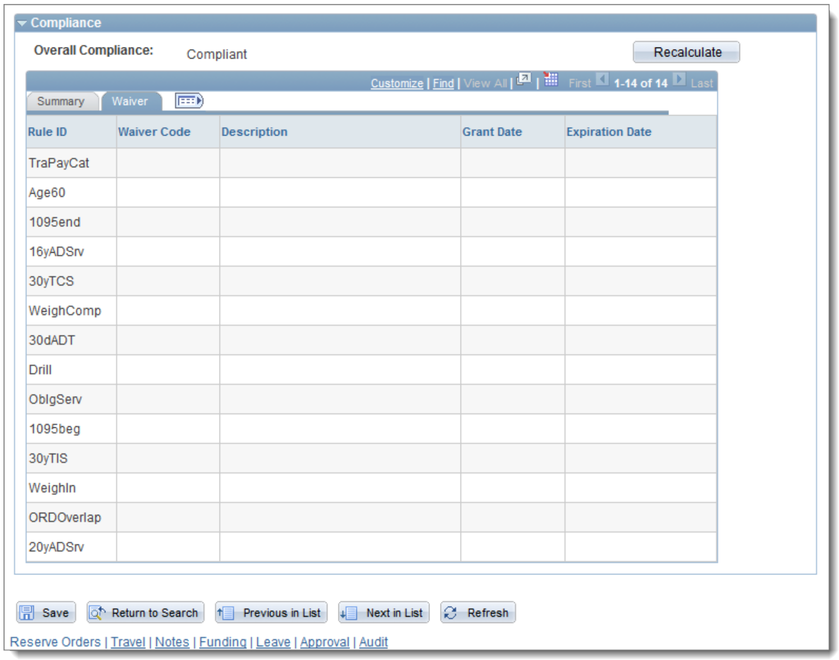


Figure 163: Waiver Tab

The Travel tab contains the Itinerary for the order.

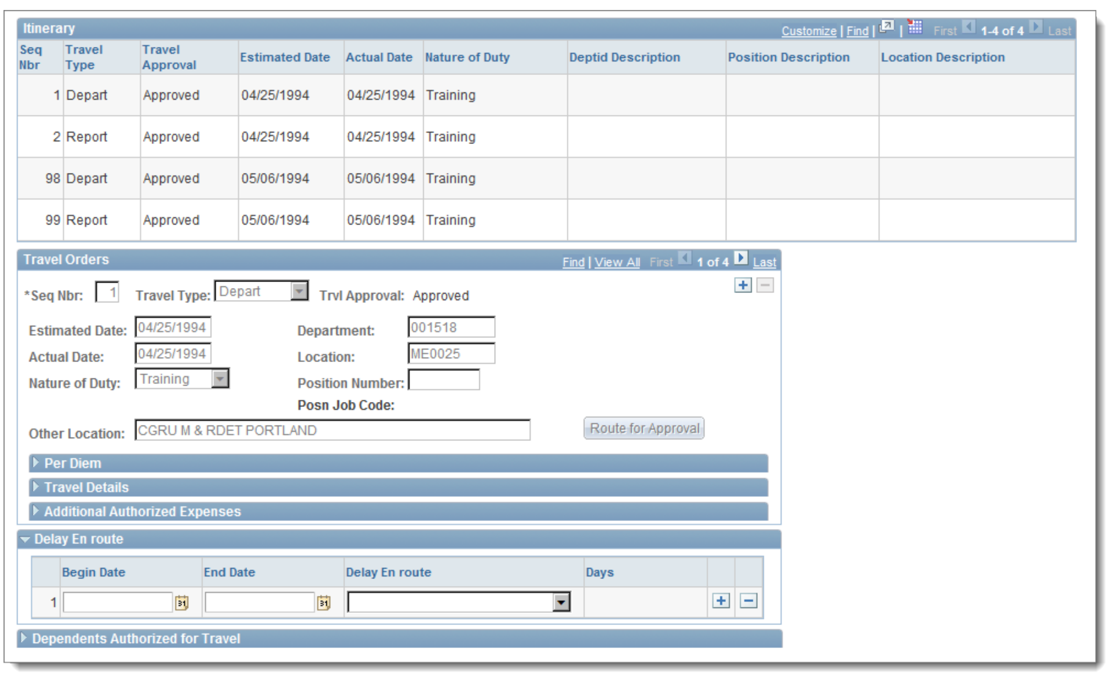


Figure 164: Travel Tab

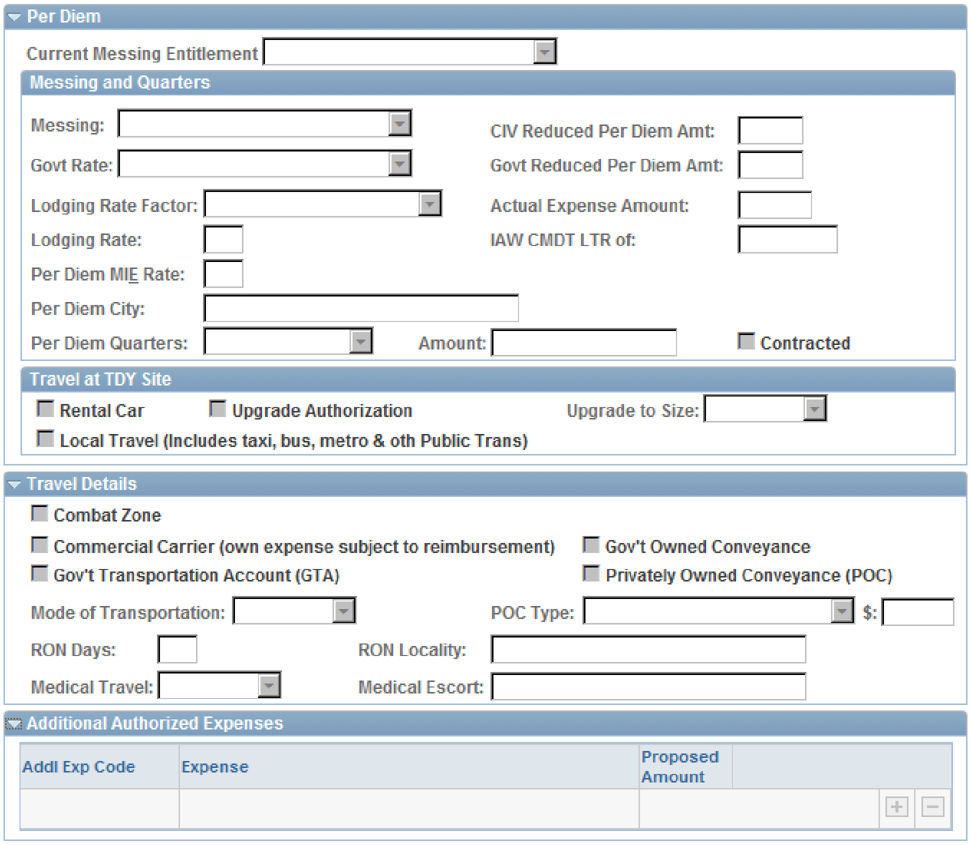


Figure 165: Travel Details

The Notes tab displays the clauses that are associated with the order.

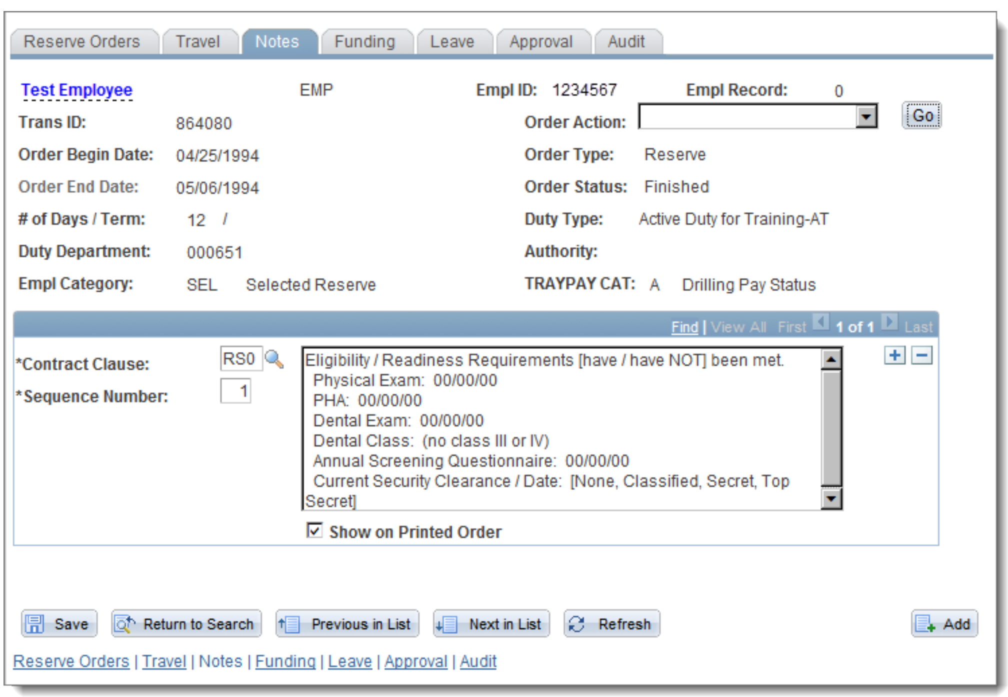


Figure 166: Notes Tab

The Funding tab displays the of the TONO and LOA details.

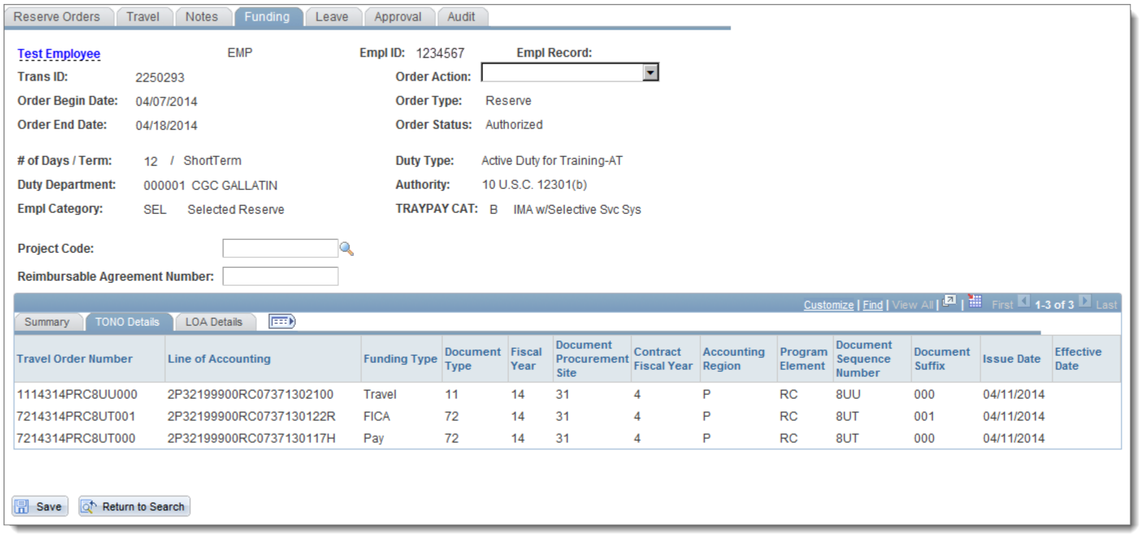


Figure 167: Funding Tab

The Leave tab displays the leave balance for the member.

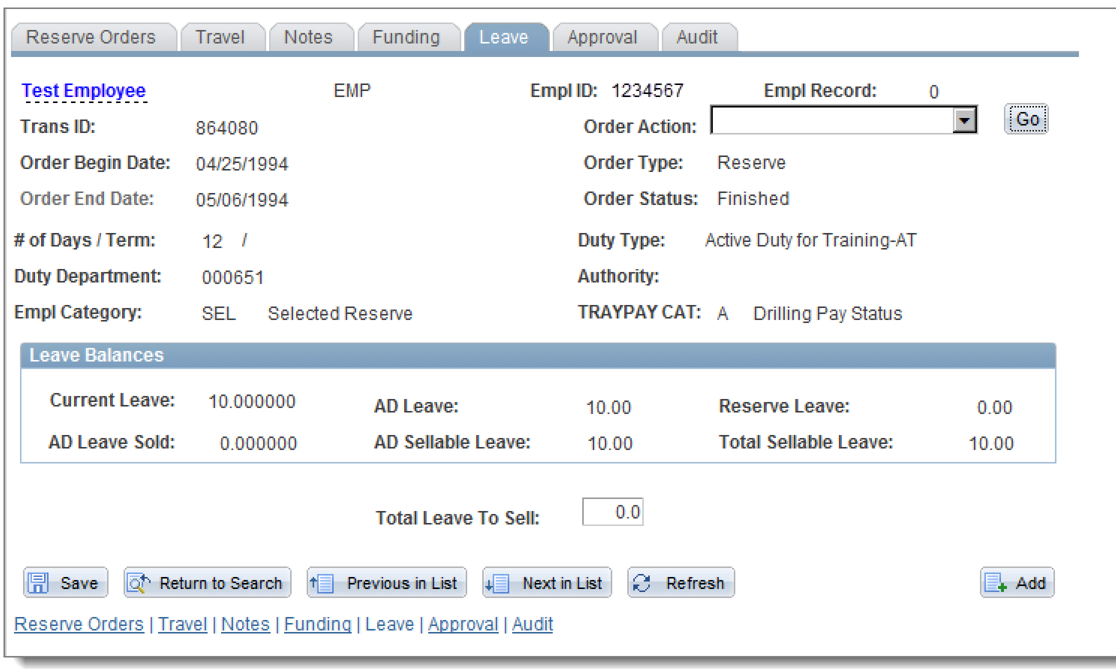


Figure 168: Leave Tab

The Approval tab displays the approval history for the order. The reserve header is not displayed on the Approval tab.

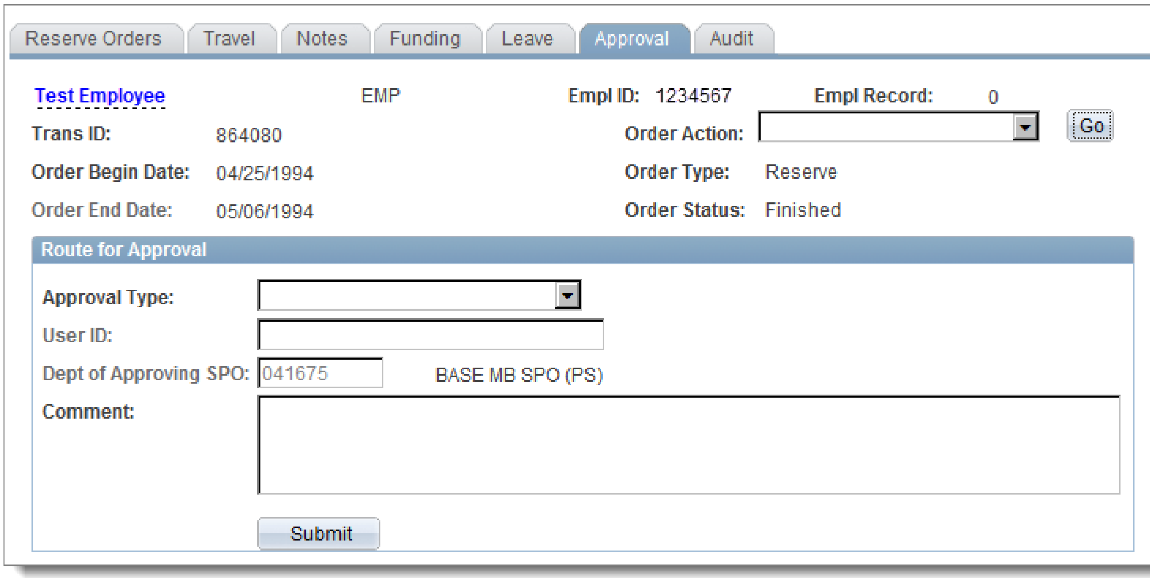


Figure 169: Approval Tab

The Audit tab displays the history of changes for the order. This page is read only.

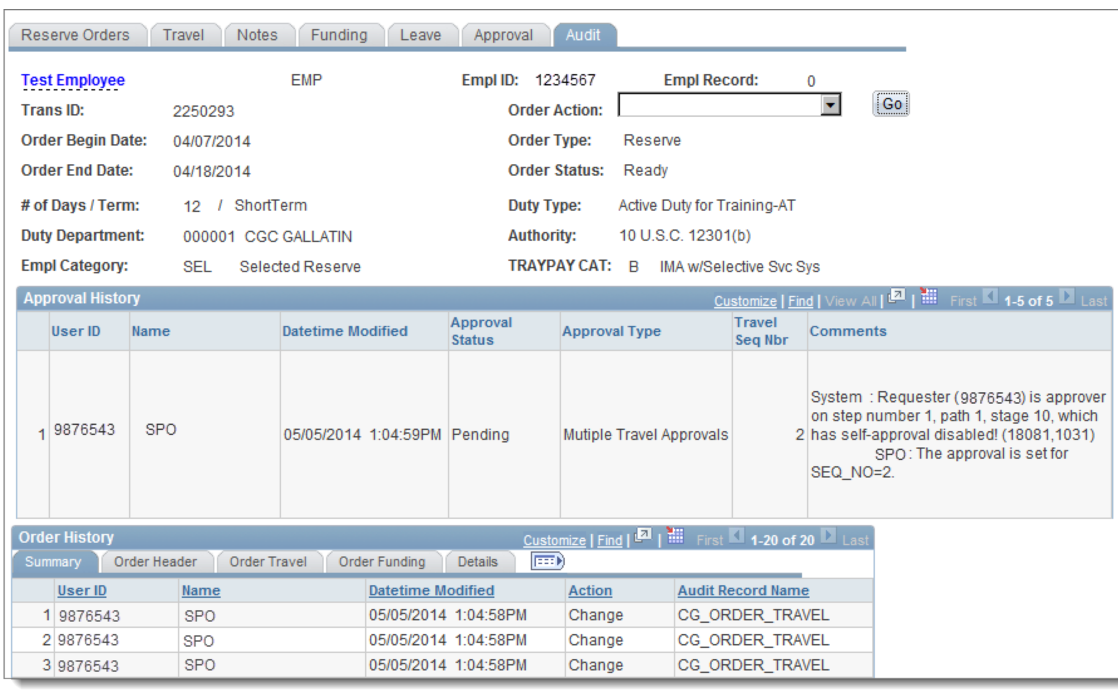


Figure 170: Audit Tab

8.6.2 Entering Order Notes

The order Notes tab displays any clauses for the order. Additional notes may be added to the order using this page.

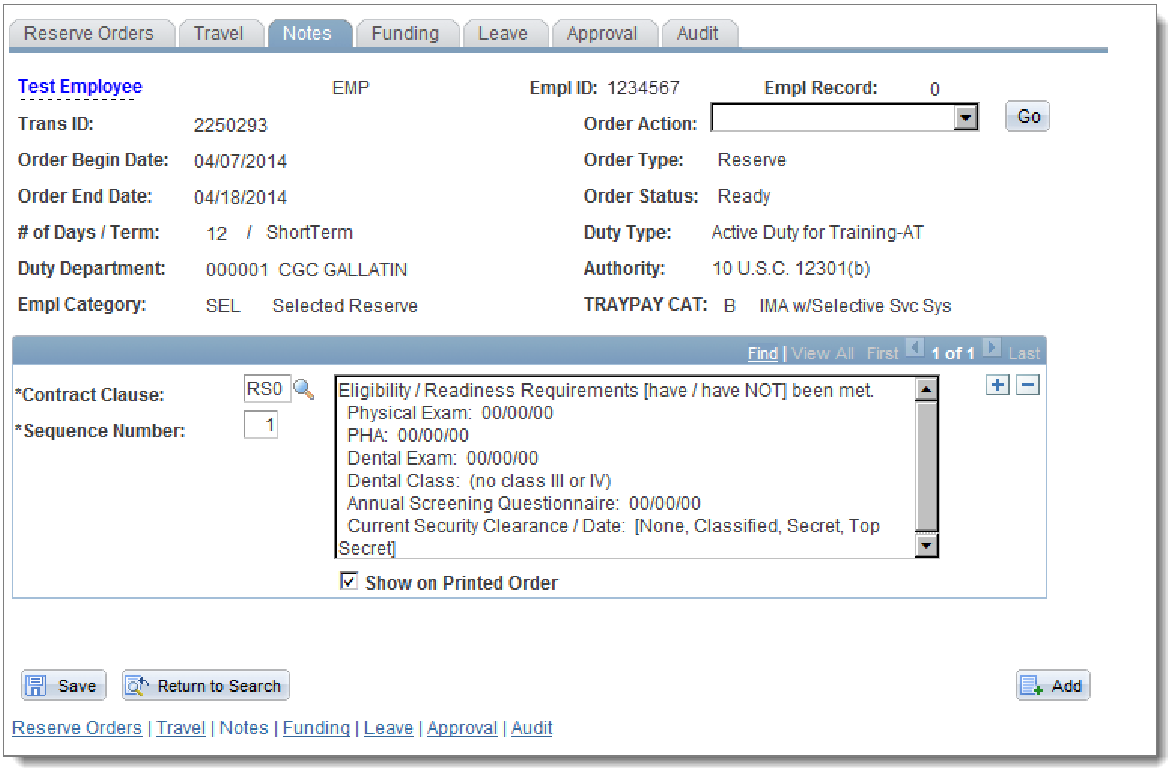


Figure 171: Order Notes Tab

1. To add additional clauses to an order, click .
2. Use the lookup tool to add a Contract Clause.
3. Enter a sequence number.
4. To prevent a clause from showing on the printed order check the Show on Printed Order check box for the associating clause. This change can be made at anytime.
5. Click Save.

8.6.3 Selling Leave

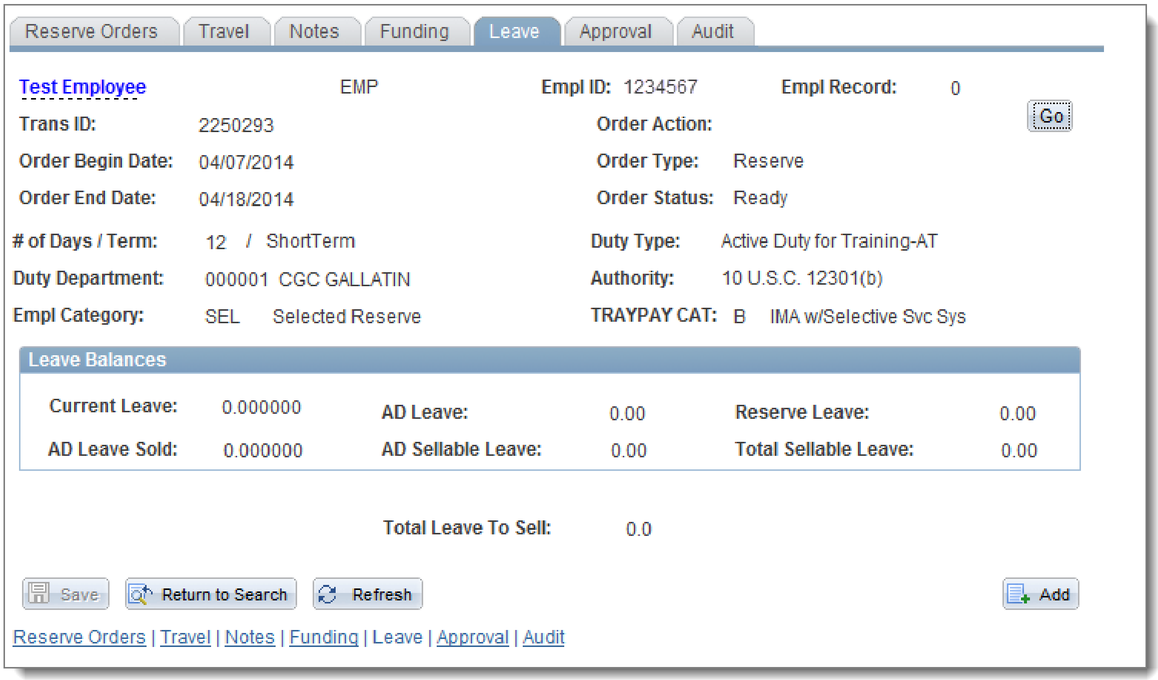


Figure 172: Leave Tab

- The balances are as of current date and do not include forecasted leave for end of order.
- The system will not allow the user to enter more leave to be sold than the Total Sellable Leave.
- Total Leave to sell is disabled for LongTerm orders. To sell leave the order type must be RELAD.

The fields on this page are listed below in the table along with a description.

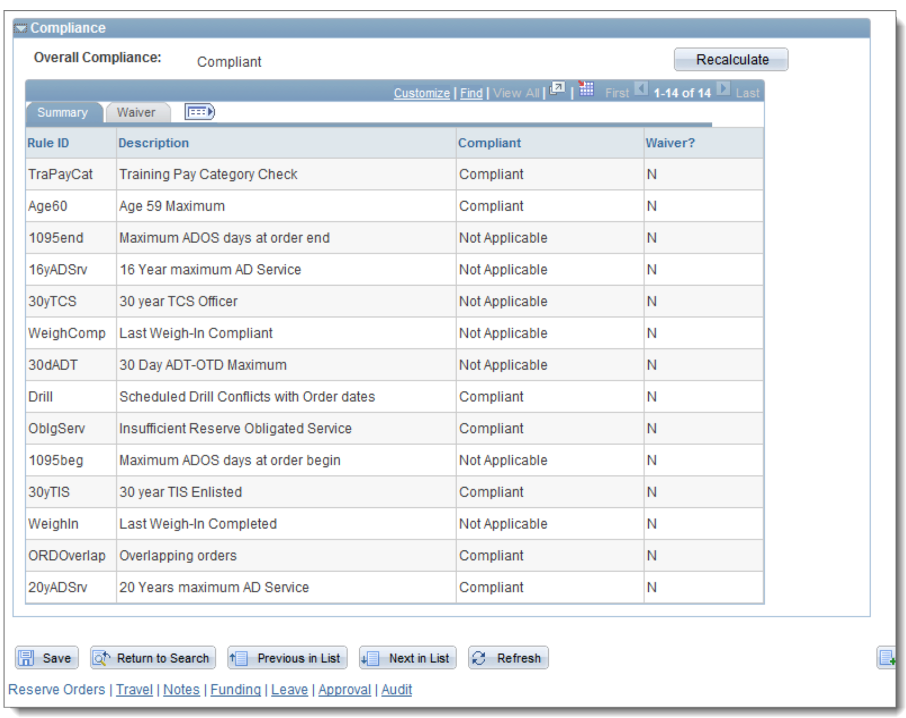
Field Name	Description
Current Leave	Global Pay accumulator of cumulative leave days available
Reserve Leave	Global Pay accumulator of reserve leave balance
AD Leave Sold	Global Pay accumulator of Active duty leave days sold
AD Leave	Current Leave minus Reserve Leave
AD Sellable Leave	lesser of (60 days minus Reserve Leave) OR (AD Leave)
Total Sellable Leave	AD Sellable Leave plus Reserve Leave

Table 10: Leave Fields

8.6.4 Order Compliance

Below is the Order Compliance page which displays the following:

- A list of each compliance rule and if it is compliant, non-compliant or not applicable.
- Displays the overall compliance of an order if it is compliant, non-compliant or non-compliant with waiver based on the compliance of all rules combined.
- Displays the waiver status as Y for yes if a rule has a waiver in the member's person profile.
- Not all rules can be waived.
- An error message will display if a request for approval (in any status) is made and the overall compliance is non-compliant.
- Compliance is calculated upon save and when the recalculate button is pressed.
- Compliance is enforced throughout the life of an order, including if the order has been amended (begin or end dates have been changed).



Compliance

Overall Compliance: Compliant

Recalculate

Customize | Find | View All | First 1-14 of 14 Last

Summary | Waiver

Rule ID	Description	Compliant	Waiver?
TraPayCat	Training Pay Category Check	Compliant	N
Age60	Age 59 Maximum	Compliant	N
1095end	Maximum ADOS days at order end	Not Applicable	N
16yADSrv	16 Year maximum AD Service	Not Applicable	N
30yTCS	30 year TCS Officer	Not Applicable	N
WeighComp	Last Weigh-In Compliant	Not Applicable	N
30dADT	30 Day ADT-OTD Maximum	Not Applicable	N
Drill	Scheduled Drill Conflicts with Order dates	Compliant	N
OblgServ	Insufficient Reserve Obligated Service	Compliant	N
1095beg	Maximum ADOS days at order begin	Not Applicable	N
30yTIS	30 year TIS Enlisted	Compliant	N
WeighIn	Last Weigh-In Completed	Not Applicable	N
ORDOverlap	Overlapping orders	Compliant	N
20yADSrv	20 Years maximum AD Service	Compliant	N

Save | Return to Search | Previous in List | Next in List | Refresh

Reserve Orders | Travel | Notes | Funding | Leave | Approval | Audit

Figure 173: Compliance

Below is the Waiver tab which displays the following:

- If there is a valid waiver, the system will display the wavier code, description, grant date and expiration date.

- Waiver grant date must be before or equal to the order begin date.

- Expiration date must be greater than or equal to the order end date.

- The compliance will be marked “Non-Compliant with Waiver”.

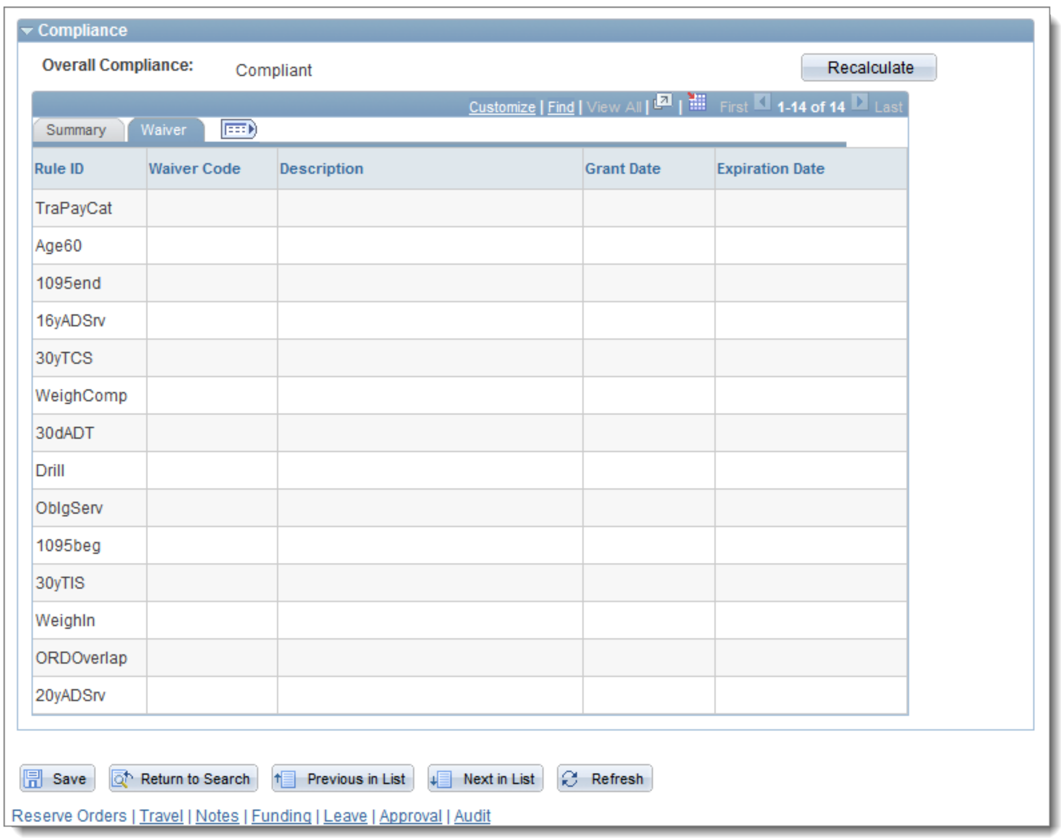


Figure 174: Waiver Tab

8.6.5 Create/Submit Reserve Waiver

1. To create and submit a Reserve Waiver for a member, locate the member's Person Profile record.

Figure 175: Person Profile

2. Click on the Wavier tab and click Add New Waiver.

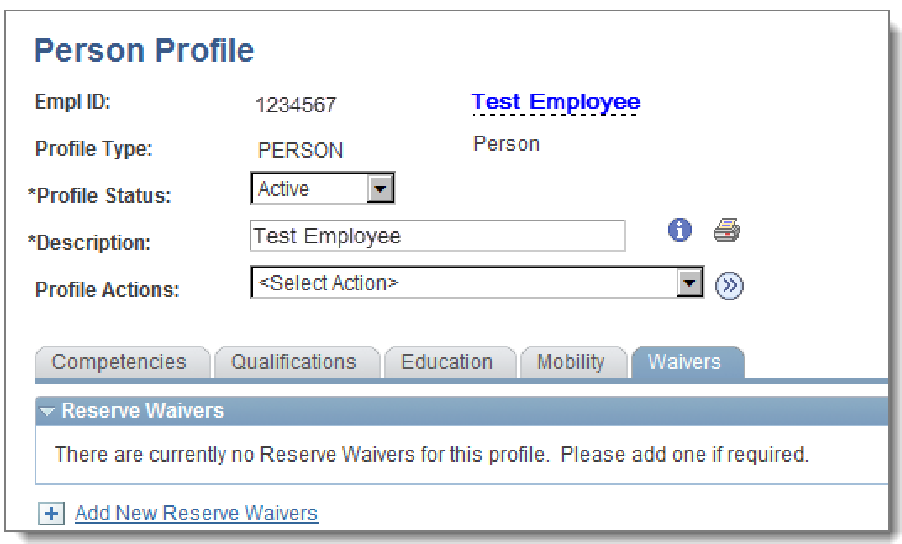


Figure 176: Waiver Tab

3. The Waiver page will display.

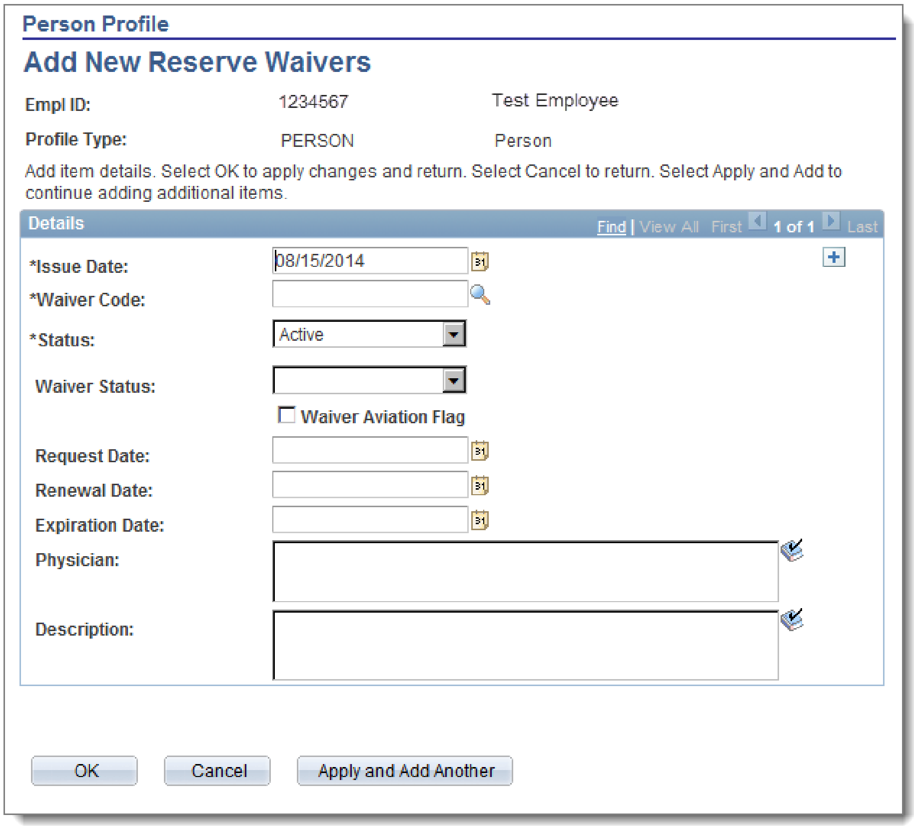


Figure 177: Add New Waiver

- Issue Date: This the effective date of the waiver which must be on or before the order end date to apply.
- Waiver Code: Is selected when creating the waiver. This is assigned to a rule on the compliance setup page.
- Status: This is where the waiver can be activated to be applied to the order or deactivated so it does not apply to the order.
- Expiration Date: This is when the waiver expires. It must be on or after the order begin date to apply.
- Remaining fields are not applicable to reserve orders

8.6.6 Add/Update Member Weigh-In Information

1. To add Member Weigh-In information for a member, click on the Mobility tab on the Person Profiles page and select Add New Weigh-In Information.

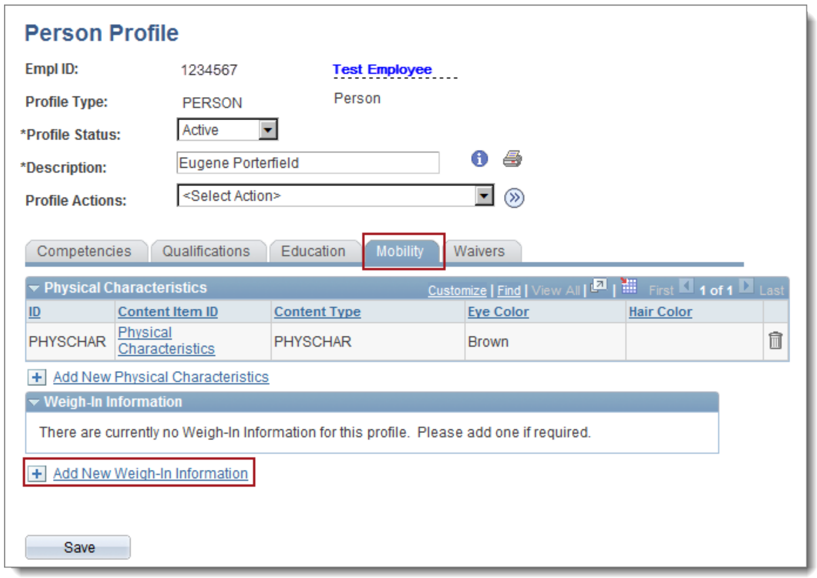


Figure 178: Member Weigh-In Information

2. Fill out the required fields marked with an * since those are required fields.

If the member is overweight, the Overweight check box will have to be checked, if this box is not checked for an overweight member, then when the Reserve Orders component validates the member's weigh-in information it will check out ok and not be marked non-compliant.

8.6.7 DD214

For Long Term Reserve Orders the DD214 is generated with a RELAD. To generate a DD214 for a Short Term Reserve Order refer to the Separations User Guide section 11.10 Generating a DD214 for Short Term Reserve Orders.

8.7 Order Setup and Configuration

8.7.1 Contingency Setup

1. To setup a new contingency or modify an existing contingency, from the portal homepage on the Enterprise menu, click Reserve Activities, Setup, and Contingency Ops.

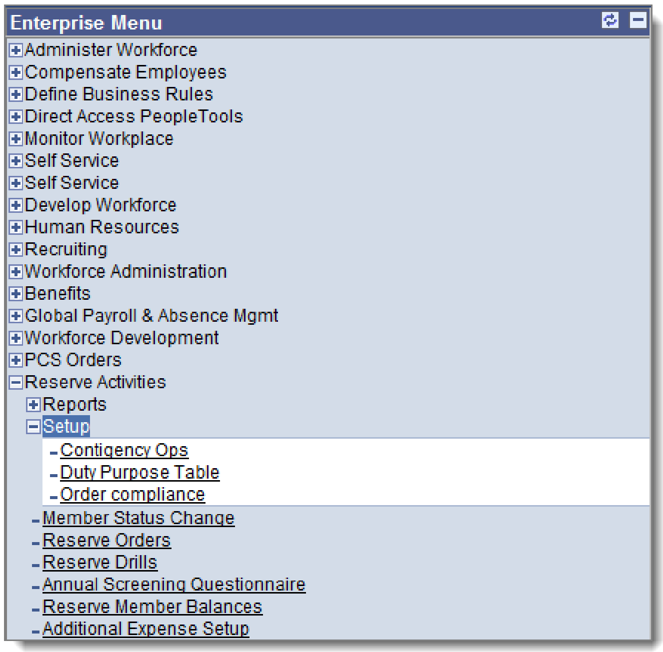


Figure 179: Contingency Setup

2. Click Add a New Value for a new contingency and click Add.

Figure 180: Add a New Value

3. The Operation Begin Date, Authority Code and Short Description are required fields. Click Save. The Operational ID will generate.

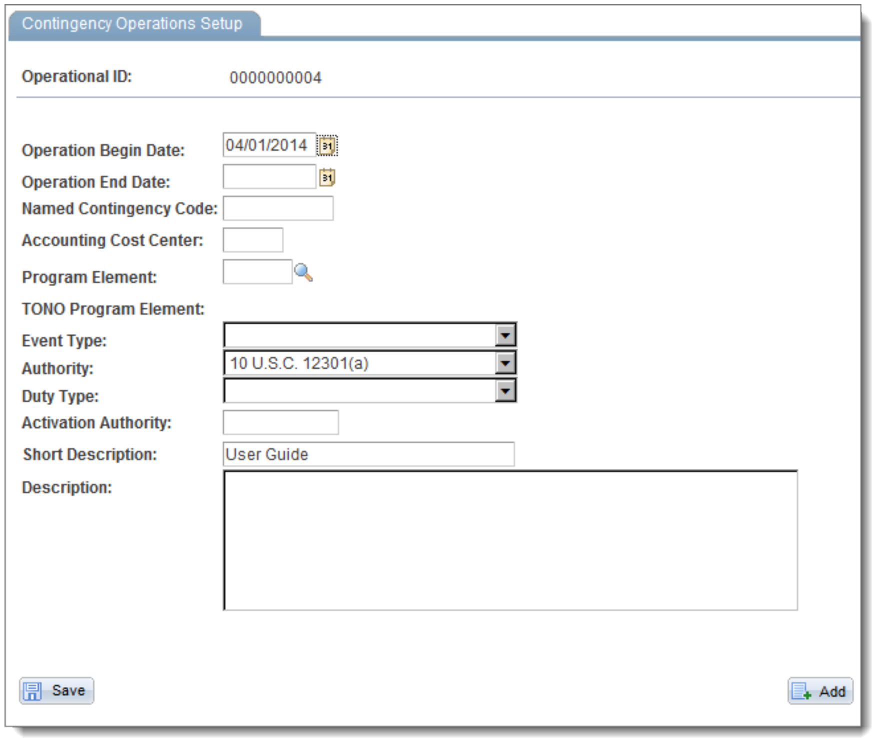


Figure 181: Contingency Operations Setup

8.7.1.1 Modify an Existing Contingency

1. To modify an existing contingency, navigate to the contingency page [(Contingency Setup 7.6)](). Contingencies can be searched for with or without entering any search criteria.

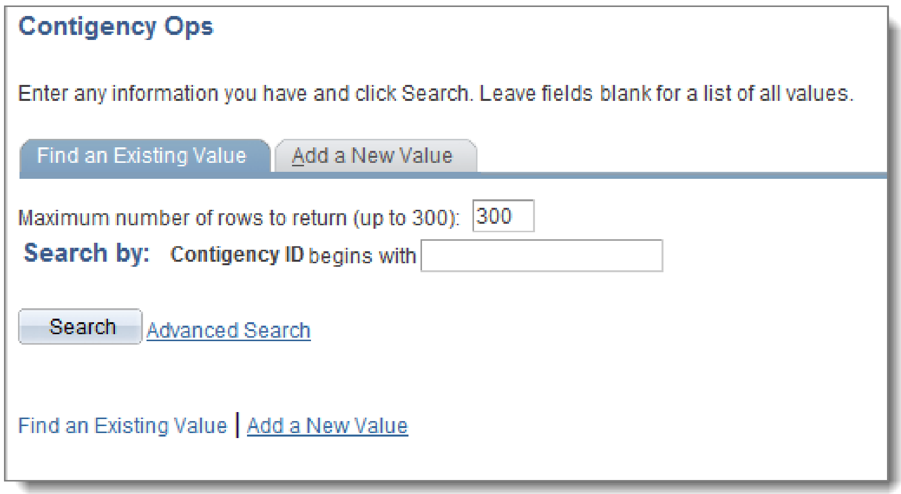
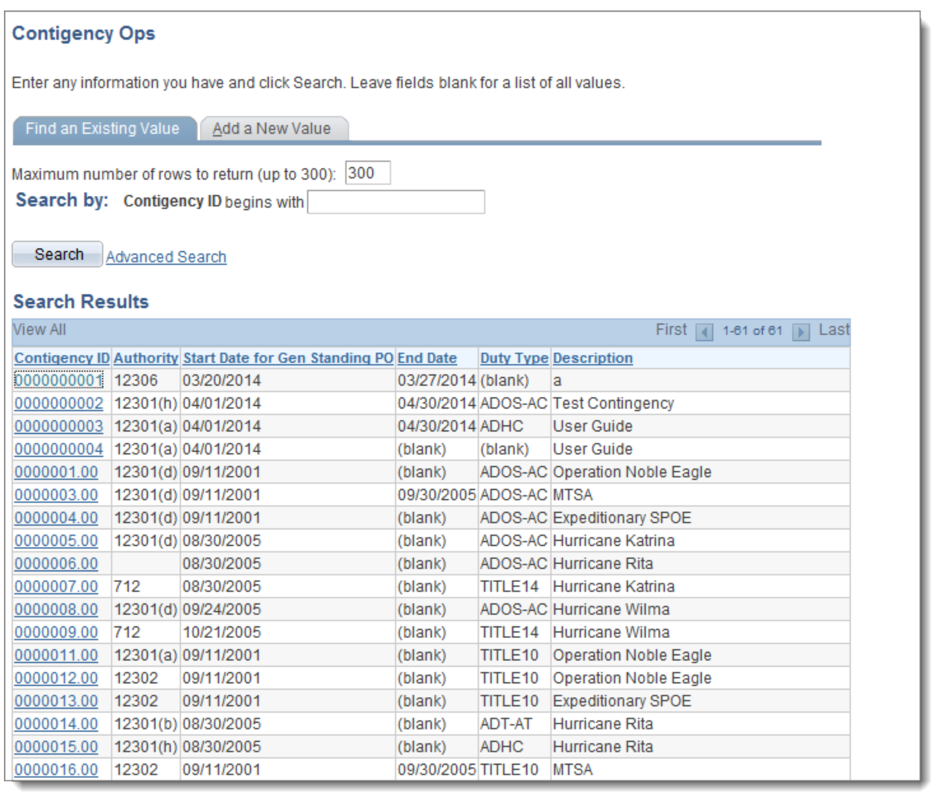


Figure 182: Modify Existing Contingency

2. From the search results list select the contingency to modify.



Contigency ID	Authority	Start Date for Gen Standing PO	End Date	Duty Type	Description
0000000001	12306	03/20/2014	03/27/2014	(blank)	a
0000000002	12301(h)	04/01/2014	04/30/2014	ADOS-AC	Test Contingency
0000000003	12301(a)	04/01/2014	04/30/2014	ADHC	User Guide
0000000004	12301(a)	04/01/2014	(blank)	(blank)	User Guide
0000001.00	12301(d)	09/11/2001	(blank)	ADOS-AC	Operation Noble Eagle
0000003.00	12301(d)	09/11/2001	09/30/2005	ADOS-AC	MTSA
0000004.00	12301(d)	09/11/2001	(blank)	ADOS-AC	Expeditionary SPOE
0000005.00	12301(d)	08/30/2005	(blank)	ADOS-AC	Hurricane Katrina
0000006.00		08/30/2005	(blank)	ADOS-AC	Hurricane Rita
0000007.00	712	08/30/2005	(blank)	TITLE14	Hurricane Katrina
0000008.00	12301(d)	09/24/2005	(blank)	ADOS-AC	Hurricane Wilma
0000009.00	712	10/21/2005	(blank)	TITLE14	Hurricane Wilma
0000011.00	12301(a)	09/11/2001	(blank)	TITLE10	Operation Noble Eagle
0000012.00	12302	09/11/2001	(blank)	TITLE10	Operation Noble Eagle
0000013.00	12302	09/11/2001	(blank)	TITLE10	Expeditionary SPOE
0000014.00	12301(b)	08/30/2005	(blank)	ADT-AT	Hurricane Rita
0000015.00	12301(h)	08/30/2005	(blank)	ADHC	Hurricane Rita
0000016.00	12302	09/11/2001	09/30/2005	TITLE10	MTSA

Figure 183: Contingency Search Results

3. Make any necessary changes and click Save.

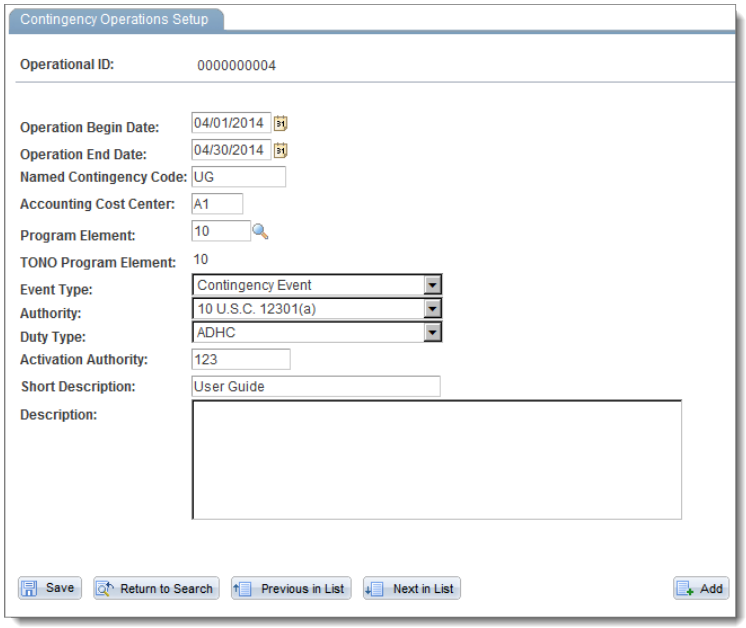


Figure 184: Contingency Changes

8.7.2 Accounting Setup

To access accounting setup, from the portal homepage on the Enterprise menu click Reserve Activities then click Setup. From here, click on the appropriate link depending on what is being setup – Program Element Budget, Department Accounting or Order Funding Project Code.

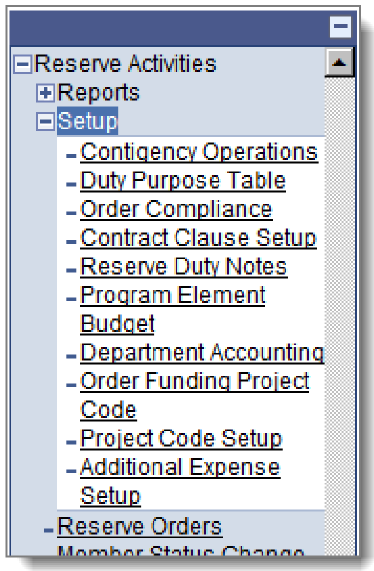


Figure 185: Accounting Setup

8.7.2.1 Add a New Program Element Budget

The Program Element Budget requires annual setup of PE per fiscal year and Used to lookup TONO/LOA fields for Reserve.

1. To setup a new Program Element Budget, click on Add a New Value. Using the look up tool select the Budget Period and Program Element and click Add.

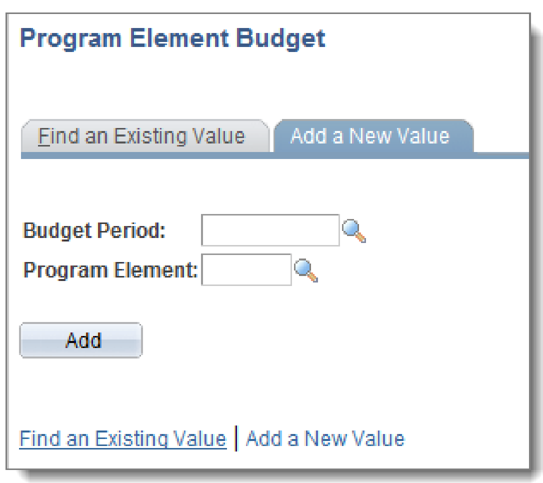


Figure 186: Program Element Budget

2. Fill out all fields below and click Save.

- Accounting Appropriation
- Accounting Allotment Fund Code
- Accounting Allotment Level
- Document Sequence Number

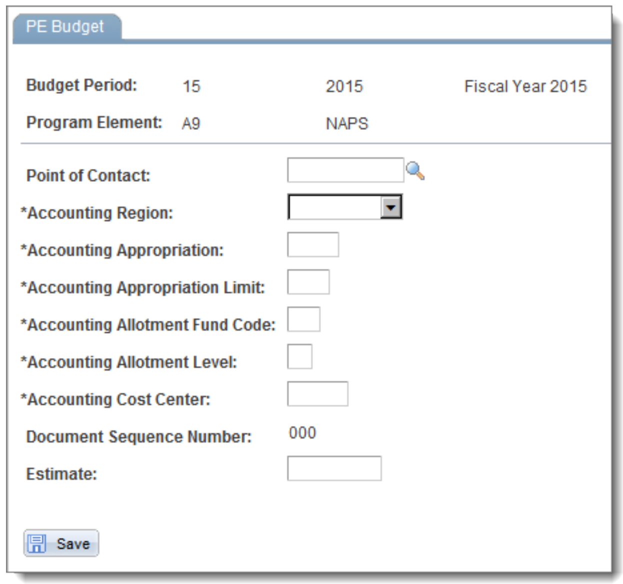


Figure 187: Add PE Budget

8.7.2.2 Edit an Existing Program Element Budget

1. To edit an existing Program Element, enter the search criteria and click Search. Select the Program Element that requires editing.

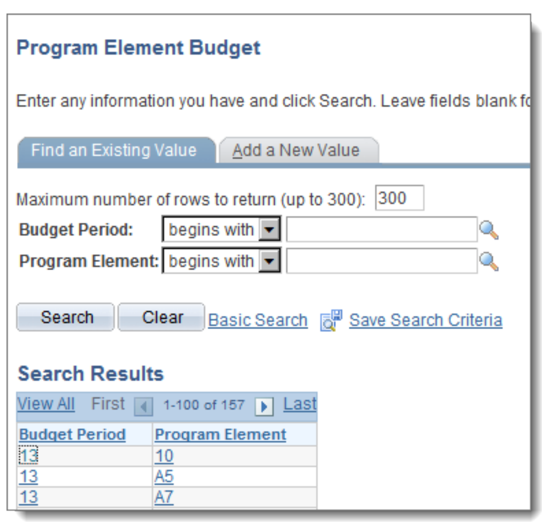


Figure 188: Search Existing Program Element Budget

2. Make the necessary edits and click Save.

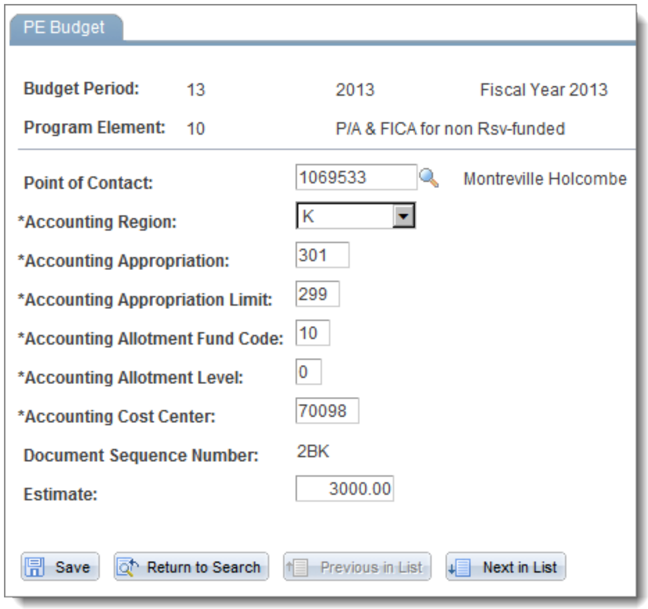


Figure 189: PE Budget Edits

8.7.2.3 Update Department Accounting

1. To update Department Accounting, enter the values for the department to be edited and click search. Select the department to be edited.

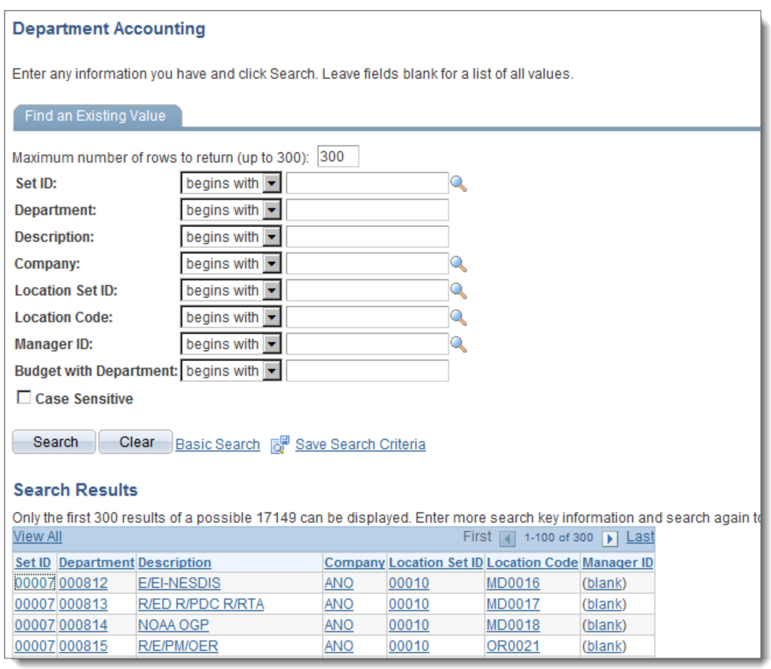


Figure 190: Department Accounting Search

2. Fill out all of the fields on this page. To insert a new row click on the + and fill out all of the fields and click Save.

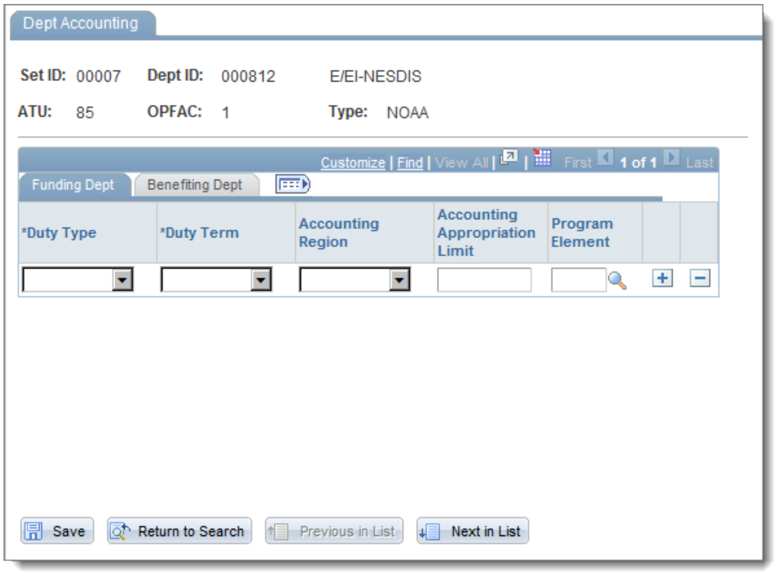


Figure 191: Department Accounting Edit

3. Select the Benefiting Dept tab. Fill out the fields and click Save.

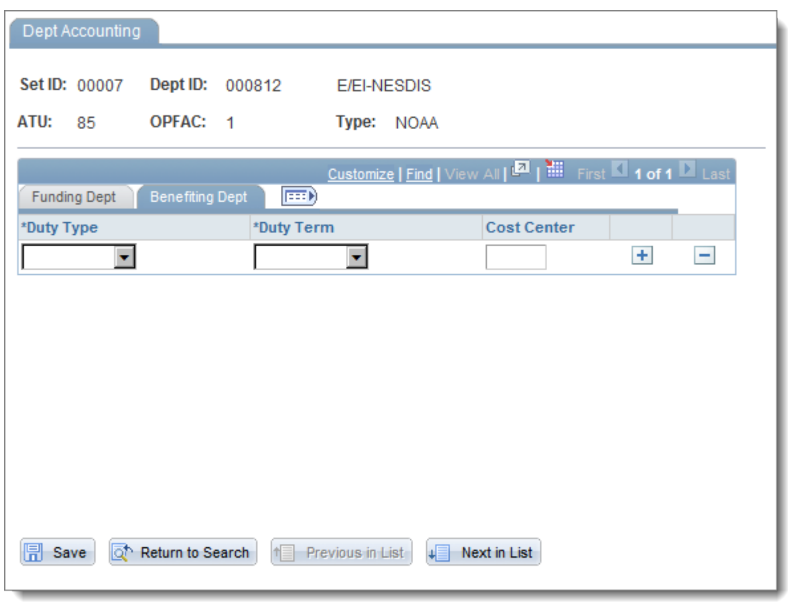


Figure 192: Benefiting Dept

8.7.2.4 Add a New Order Funding Project Code

1. To add a new Funding Project Code, enter the project code and click Add.

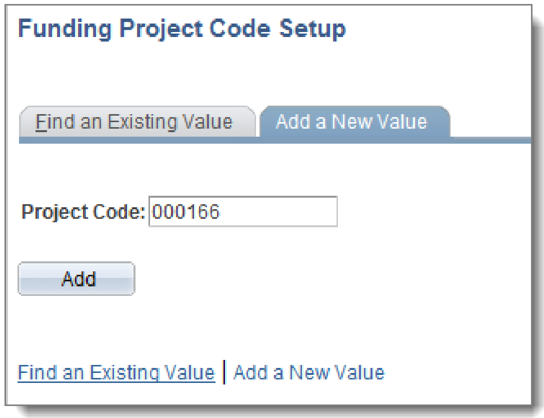


Figure 193: Add Funding Project Code

2. Fill out the fields and click Save.

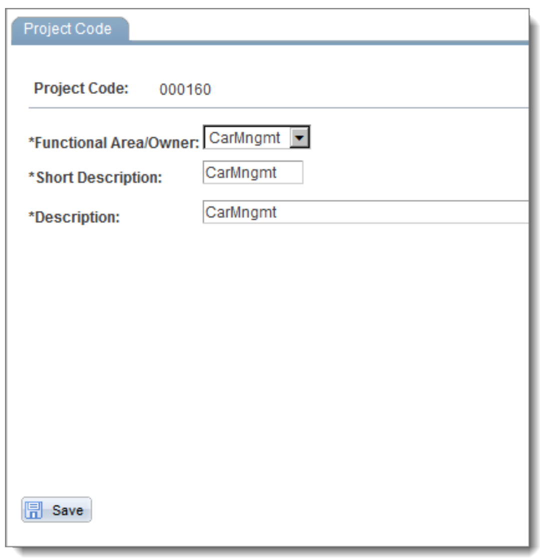


Figure 194: Save Project Code

8.7.2.5 Edit an Existing Order Funding Project Code

1. To edit an existing Order Funding Project Code, enter the search criteria and click search. Select the Project Code to be edited from the search results.

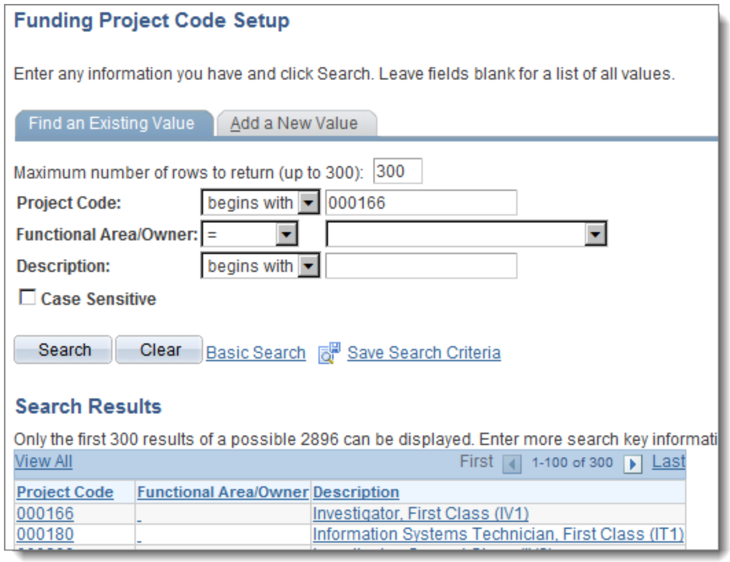


Figure 195: Edit Existing Project Code

2. Make the necessary edits and click Save.

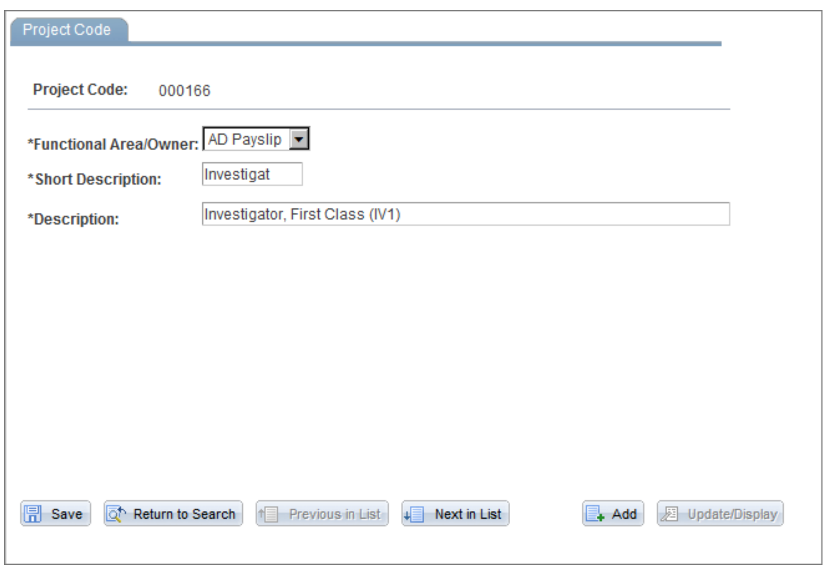


Figure 196: Existing Project Code Edit

8.7.3 Order Notes

To setup Order Notes, from the portal homepage, navigate using the Enterprise Menu following this navigation path: Reserve Activities> Setup> Reserve Duty Notes.

1. To add a new order note, click Add a Value. Leave the Duty Type blank and click Add.

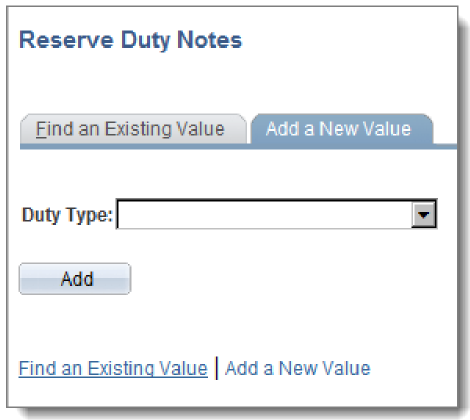


Figure 197: Add New Order Note

2. Enter a Seq Nbr.

3. Select a Contract Clause.

4. Select if you want a Contingency associated with this note.

5. The comments are pre-generated. Click Save.

Figure 198: New Order Note

8.7.3.1 Edit Existing Order Note

1. To edit an existing Order Note, select the Duty Type from the drop down and click Search.

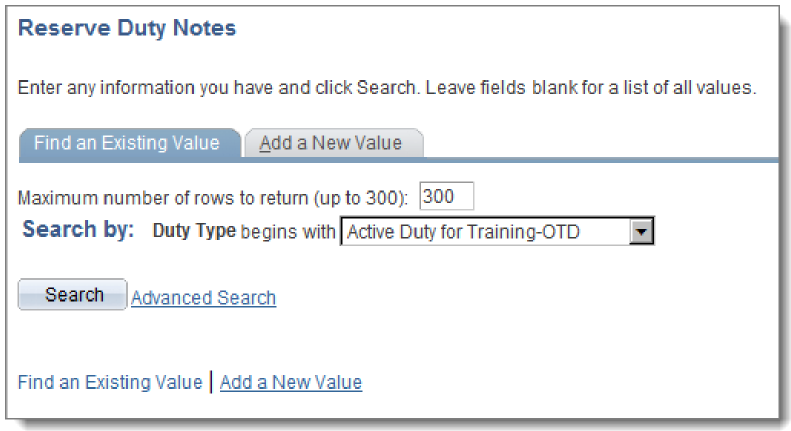


Figure 199: Edit Existing Order Note

2. All of the Order Notes associated with the Duty Type will be displayed in a collapsed view. To view all of the notes, click View All.

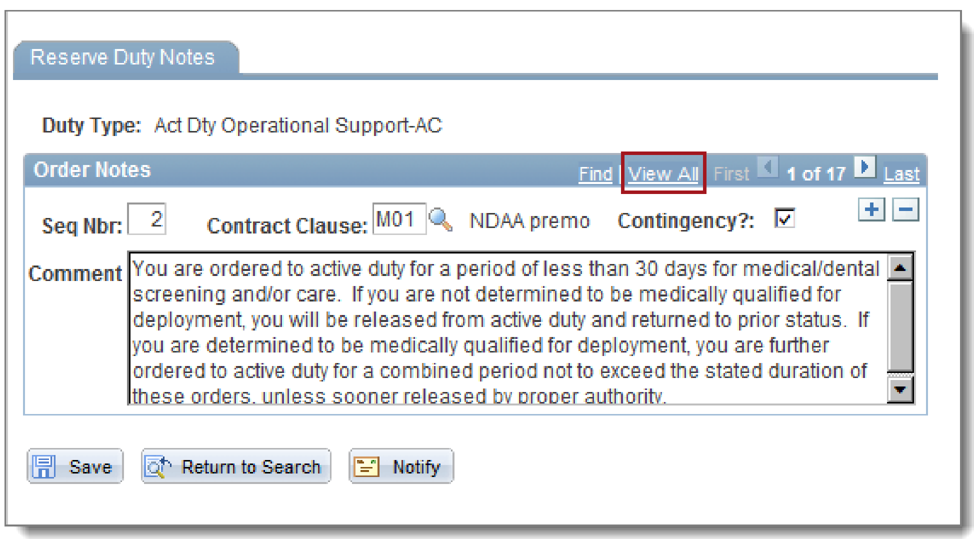


Figure 200: View All Order Notes

This page allows the user to edit the Contingency and wording of the Contract Clause. After making any changes, click Save.

On this page users may also re-order the clauses in which they will be displayed by editing the Seq Nbr.

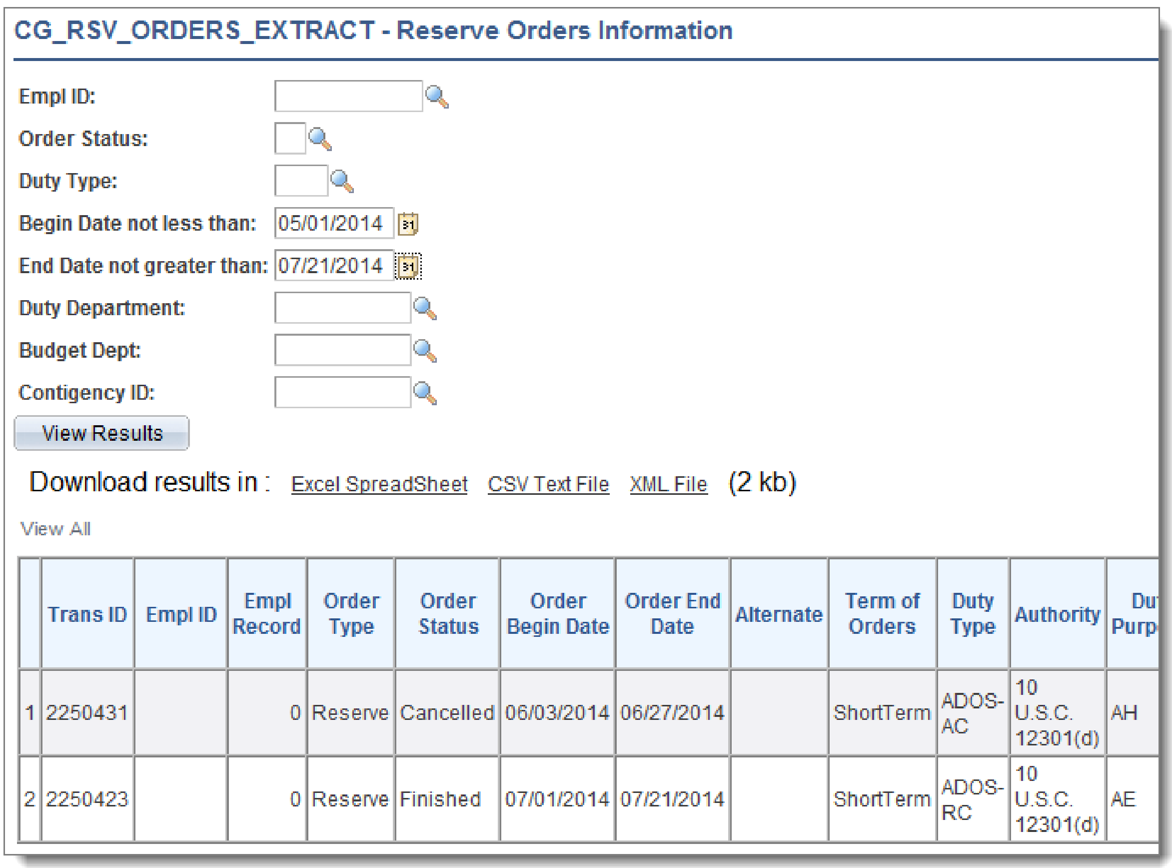
8.8 Reserve Order Reports

The following reports are associated with Reserve Orders:

- Reserve Orders Extract
- RSV Orders w/Invalid Accounting
- Unfinished Reserve Orders
- Amended Reserve Orders

8.8.1 Reserve Orders Extract Report

This report displays orders for a member. Enter the EmplID, Begin Date not less than and the End Date not greater than and click View Results.


CG_RSV_ORDERS_EXTRACT - Reserve Orders Information

Empl ID:
Order Status:
Duty Type:
Begin Date not less than: 05/01/2014
End Date not greater than: 07/21/2014
Duty Department:
Budget Dept:
Contigency ID:

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (2 kb)

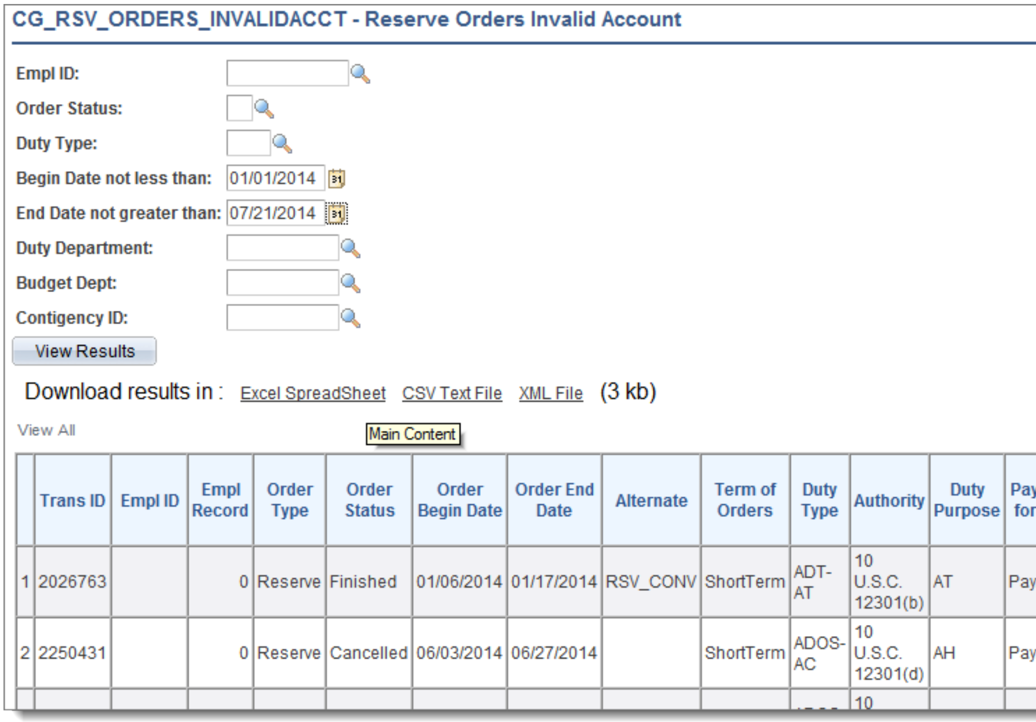
View All

	Trans ID	Empl ID	Empl Record	Order Type	Order Status	Order Begin Date	Order End Date	Alternate	Term of Orders	Duty Type	Authority	Du Purp
1	2250431		0	Reserve	Cancelled	06/03/2014	06/27/2014		ShortTerm	ADOS-AC	10 U.S.C. 12301(d)	AH
2	2250423		0	Reserve	Finished	07/01/2014	07/21/2014		ShortTerm	ADOS-RC	10 U.S.C. 12301(d)	AE

Figure 201: Reserve Orders Extract Report

8.8.2 Reserve Orders with Invalid Accounting Report

This report displays all of the orders that have invalid accounting. Enter the EmplID, Begin Date not less than and End Date not greater than and click View Results.



CG_RSV_ORDERS_INVALIDACCT - Reserve Orders Invalid Account

Empl ID:
Order Status:
Duty Type:
Begin Date not less than: 01/01/2014
End Date not greater than: 07/21/2014
Duty Department:
Budget Dept:
Contigency ID:
View Results

Download results in : Excel SpreadSheet CSV Text File XML File (3 kb)

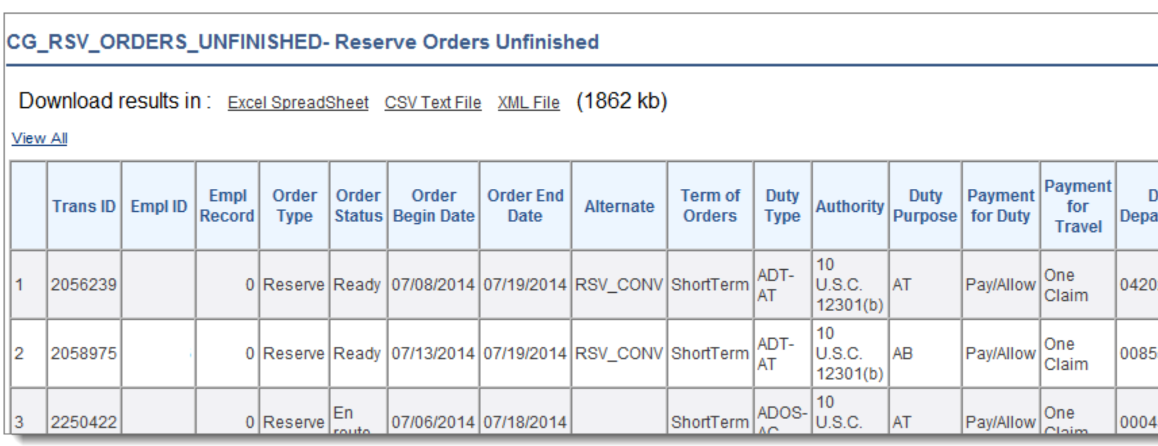
View All Main Content

	Trans ID	Empl ID	Empl Record	Order Type	Order Status	Order Begin Date	Order End Date	Alternate	Term of Orders	Duty Type	Authority	Duty Purpose	Pay for
1	2026763		0	Reserve	Finished	01/06/2014	01/17/2014	RSV_CONV	ShortTerm	ADT-AT	10 U.S.C. 12301(b)	AT	Pay/
2	2250431		0	Reserve	Cancelled	06/03/2014	06/27/2014		ShortTerm	ADOS-AC	10 U.S.C. 12301(d)	AH	Pay/
											10		

Figure 202: Reserve Orders with Invalid Accounting

8.8.3 Unfinished Reserve Orders

This report displays all of the orders that are not yet finished. This is a real time report which will run once the link is clicked on.



CG_RSV_ORDERS_UNFINISHED- Reserve Orders Unfinished

Download results in : Excel SpreadSheet CSV Text File XML File (1862 kb)

View All

	Trans ID	Empl ID	Empl Record	Order Type	Order Status	Order Begin Date	Order End Date	Alternate	Term of Orders	Duty Type	Authority	Duty Purpose	Payment for Duty	Payment for Travel	Du Depa
1	2056239		0	Reserve	Ready	07/08/2014	07/19/2014	RSV_CONV	ShortTerm	ADT-AT	10 U.S.C. 12301(b)	AT	Pay/Allow	One Claim	04202
2	2058975		0	Reserve	Ready	07/13/2014	07/19/2014	RSV_CONV	ShortTerm	ADT-AT	10 U.S.C. 12301(b)	AB	Pay/Allow	One Claim	00855
3	2250422		0	Reserve	En route	07/06/2014	07/18/2014		ShortTerm	ADOS-AC	10 U.S.C.	AT	Pay/Allow	One Claim	00045

Figure 203: Unfinished Reserve Orders

8.8.4 Amended Reserve Orders

This report displays all of the orders that have been amended. Enter the EmplID, Begin Date less than, End Date not greater than and click View Results.

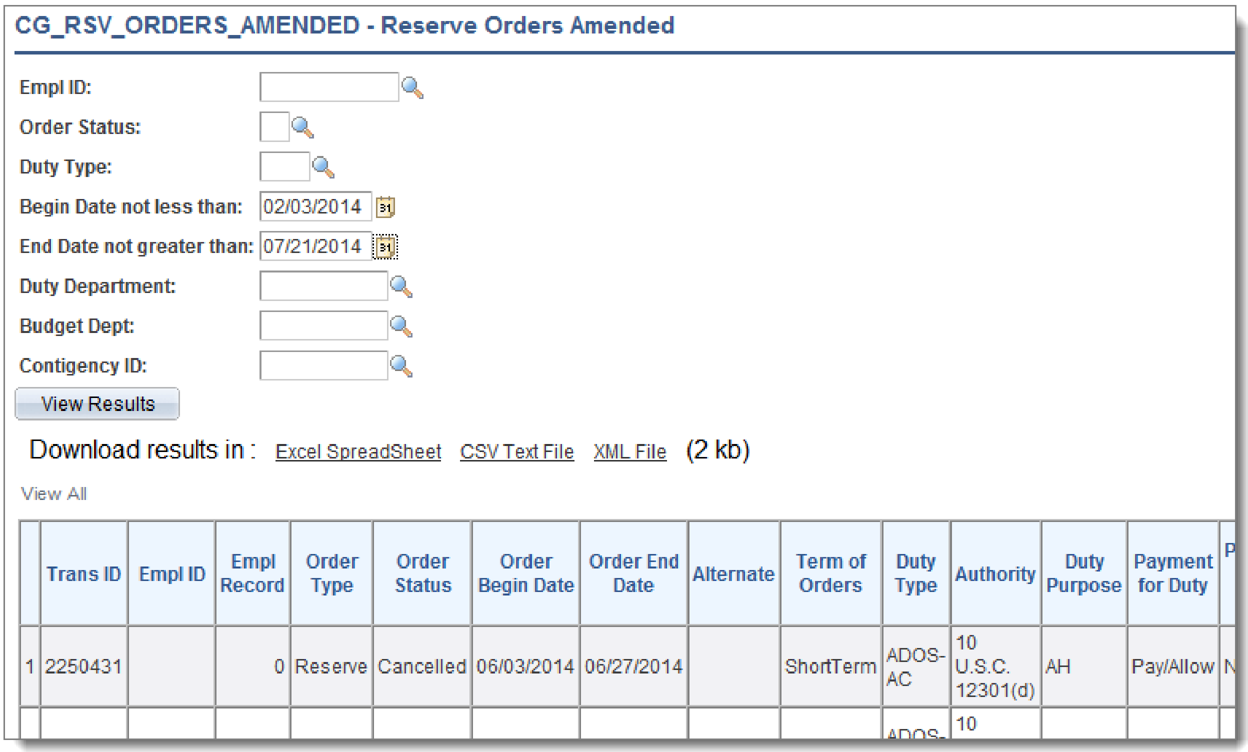


Figure 204: Reserve Orders Amended