Servicing Personnel Office News

United States Coast Guard Pay & Personnel Center

Contents

Questions & Answers and Best Practices from the 2011 PPC YN Symposium (Pages 1-23)

2011 PPC YN Symposium

After-Action Report

The 2011 PPC YN Symposium held in Topeka, KS the week of September 12-15, 2011 was a great success! We entertained the largest attendance to date, 239, and we were honored to have so many knowledgeable guest speakers including our two keynote speakers, MCPOCG Michael Leavitt and RDML Richard Gromlich. Many thanks to all who participated during the week; we could not have been successful without you.

The theme this year was ***Waves of Change: Oceans of Opportunity*** and the topics were broken into four tracked sessions each day consisting of:

Exploring Travel
Paying It Forward
Quality Assurance
Tools and Resources

As promised, all Q&A and Best Practices are included in this edition of the SPO Newsletter as well as some of the statistical results from our attendance surveys. All pictures, presentations, and materials from the 2011 PPC YN Symposium can be located using the following link: http://www.uscg.mil/ppc/2011spoadmin.asp

The entire PPC Staff appreciate all of your feedback and comments! We look forward to continuing our working partnership with all of you in the future while fulfilling the needs of our fellow CG members.

Exploring Travel — Track #1

Q. What does IBOP stand for and what exactly does it mean?

A. IBOP stands for International Balance of Payment and it means the amount of U.S. dollars spent in a foreign country: our government wants to track these monies. The USCG neither currently uses this feature in TPAX nor does it track USCG member money spent.

Q. What standard does the Coast Guard apply when deciding whether an amount for a given service was correct when that amount is not in the JFTR?

A. JFTR U2010, the prudence standard (i.e. spend the dollars like they were your own.

Q. Isn't the tip to a cab driver 15%?

A. It used to be but the JFTR no longer applies a percentage standard.

Q. If I pay for another traveler's room, how much will I be reimbursed?

A. 50%

Q. Why can't I use hotels.com?

A. It is difficult to get a receipt from the hotel. You should avoid this website. (*Note: JFTR Change 300, 1 December 2011, allows reimbursement for lodging expenses paid to an online booking agent provided an itemized receipt is provided, even if the receipt is from the online booking agent and not the hotel based on CBCA 2431-TRAV, 13 September 2011. Affects pars. U1039-E2b, U4129-H, T4040-A8, and T4050-B2.)*

Q. If the Navy issues an evacuation order how do I file this claim with the Coast Guard?

A. If the Navy is the order-issuing authority, you would file with the Navy.

Q. What is the number one reason for recouping travel money paid to a member?

A. Failure to respond to an audit.

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About the SPO Newsletter

An authorized publication, the SPO Newsletter is published under the direction of the U.S. Coast Guard Pay & Personnel Center. Views and opinions expressed are not necessarily those of the Department of Homeland Security or the U.S. Coast Guard. The SPO Newsletter shall not be considered an authority for any official action and is non-record material. The SPO Newsletter is published quarterly. Articles are solicited from all readers. Back issues are available at: http://uscg.mil/ppc/sponewsletter.asp.

How to submit an article

Articles for the SPO Newsletter may be submitted by e-mail to the Procedures & Development branch e-mail address "PPC-PF-PD". Articles may also be submitted via our web form at http://www.uscg.mil/ppc/newitemform.asp. **All items approved for publication will immediately be posted on our SPO news web page** (http://uscg.mil/ppc/alspo/).

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Q. What does RAN stand for and what is it?

A. RAN is a **Reimbursable Agreement Number** and it is used when a CG traveler's expenses are paid by another agency.

Q. What kind of orders are issued to the member when he/she is evacuated?

A. TDY orders.

Q. Who gets the Evacuation orders?

A. Family members.

Q. What do I have to do to get a family member travel money via Direct Deposit?

A. Fill out the Fast Start form available on the FINCEN website.

Q. Is Split Disbursement mandatory?

A. It used to be but it no longer is. It is, however, highly suggested.

Q. Why was I denied my ATM charges on my personal CC?

A. The JFTR now reads to the effect that only the government card is reimbursed.

Q. Isn't the reasonable commuting distance 50 miles?

A. This standard is not listed in the JFTR (though it used to be).

Q. What do you use when deciding a reasonable distance?

A. We generally use 50-60 miles, though there are a couple of places we know about where the distance is longer.

Q. What if I disagree with your interpretation?

A. Re-file the claim and appeal to CG-1222.

Q. What exactly is a "Hot Audit?"

A. This is an audit sent out when a debt has been created. It has priority over all other claims.

Q. You denied my GPS in reimbursables. Why?

A. You weren't authorized.

Q. How do I get authorized?

A. You must be a military member and it must be deemed "mission essential."

Q. When is CITRIX coming off line?

A. It is scheduled to be removed 1 November, 2011.

Q. What do I do if I travel on my PCS orders but my dependents aren't traveling with me?

A. Try to file your claim once they complete travel.

Q. What happens if I file my claim with only me on it?

A. Then you will be reimbursed for **your** travel entitlements and the dependents money will be recouped.

Q. Where do I mail my travel claim if I am travelling on Invitational Travel Orders?

A. Our standard address, attn: **TST**.

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Q. Can an Amendment to orders be a stamp-signature?

A. No, it must feature an original signature.

Q. How do I file a "Supplemental" claim through TPAX?

A. You can't. This claim is a "manual" claim.

Q. What's a "manual" claim?

A. What you might call a paper claim.

Q. How many times are audits sent out?

A. Three times.

Q. What if I'm deployed and can't file my claim in time?

A. One: keep in mind you are getting three notices. Two: You can contact Customer Care via a ticket or a phone call and request a "suspension."

Q. Don't civilians also fall under the JFTR?

A. The FTR is generally applied to a civilian traveler.

Q. What is the standard for laundry expenses?

A. You must exceed 7 **nights.**

Q. How much will I be reimbursed for tipping a maid?

A. This money is covered by the Incidental Expenses (IE) portion of your Per Diem and is not a reimbursable item.

Q. Can blanket orders (doc 13) be used for foreign TDY travel?

A. No, individual orders only (doc 11).

Q. What's the reference on that?

A. JFTR, Appendix A.

- Exploring Travel Best Practices-

1. Inform via email all those under your AO responsibility to keep their relevant receipts and supporting documentation in a file.
2. Ensure that everyone knows to keep their receipts, orders and supporting documentation for **six years three months**.
3. Send out, via email, to all of those within your AO AOR interesting tips, etc., focusing on entitlements.
4. Make sure everyone takes the AO test including those who are not AO's (the course is full of really good information).
5. Make sure everyone knows where to check to see if/when their claim has been processed.
6. Remind people about the fact that they should check either online or via phone-con to ascertain what they actually owe with respect to filling in the block entitled **SPLIT DISBURSEMENT.**
7. Ensure everyone knows there is a **TRAVEL WEBSITE** and let them know it would be a good idea to become familiar with it.
8. Remind everyone there is a difference between the FTR and the JFTR.
9. Tell people not to rely upon what they have

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known in the past: the JFTR is constantly changing.

10. Let everyone know they can receive updates as to various changes via the JFTR website.

11. Be aware of the JFTR website and familiarize yourself with it: http://www.defensetravel.dod.mil/site/travelreg.cfm

12. Ensure your email address is up to date.

13. Timeliness on the AO's part. Really reinforce this!

14. Utilize the AO check list.

15. Be mindful of zip codes in large metropolitan areas, a zip code mistake can result in the assignment of a bad per diem rate.

16. Be mindful of the date you converted your currency: currency rates are constantly in flux; the date fixes the right amount.

Mr. Matt O'Connell, PPC (P&D) facilitated the Exploring Travel track of the 2011 PPC YN Symposium

Looking for more Travel/TPAX news? Check out the PPC TPAX/Travel News Feed at http://www.uscg.mil/ppc/travel/.

Paying It Forward — Track #2

Mr. Robert Teetsel and Mrs. Valerie Hanks, PPC (LGL) discuss BAH/Dependent determinations at the 2011 PPC YN symposium

Q. What role do you need in DA to complete the Applicant Data?

A. CGAPPL

Q. Why do you recommend that we set the application date 4-5 days before the actual hire date?

A. This is in case the system has a hard error that cannot be fixed. You can just start over on the very next day if the system blows up.

Q. What's the proper thing to do on the PDR side when you cancel an extension?

A. Write cancelled across the page, but leave it in there. Do NOT shred it! You should also send a copy of it to PSC-DMR to replace the original.

Q. Can PPC create a tutorial, walking through a typical accession?

A. The live accession that Pam Flewelling completed during the YN Symposium was recorded and will be put on the PPC website for viewing. The Procedures & Development team will evaluate if there is a definite need for an additional tutorial.

Q. Does DA generate a DD-Form 4/1 after completing contract data in DA?

A. No, the YN need to create it using Forms.

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Q. If you forget to write down the Applicant ID before we start working the contract data, how do you get it?

A. The easiest way is to use the open a new window link and navigate back to get it.

Q. When we do a re-hire on a member, why is his applicant data blank, when it should be in the system already?

A. This is a known error. The information should carry it over but if it doesn't, you'll need to re-enter it through the regular application (not during the re-hire).

Q. Can you start tax information and direct deposit on the same day as the hire/re-hire?

A. Yes, now you can.

Q. Can you approve a Separation Action earlier than 14 days out?

A. Retirements and RELADs can be approved if the member goes on terminal leave with no intention of coming back and the terminal leave is on the orders. Discharges can only be approved 14 days out.

Q. Where can we receive training on how to read and understand JUMPS?

A. The SPO Manual, Part IX has all the information you need to read the segments. You can also attend one of PPC's HRS Workshops where they teach you how to read and understand JUMPS and use the SPO Manual.

Q. What DA roles do you need to run the Pending Transactions Query in Direct Access?

A. CGHRS & CGSSCMD (Self-Service Command User)

Q. What is the path for the Pending Transactions Query in DA?

A. DA People Tools>Query Manager>Use>Query Manager Name…begins with…CG_SPO

Q. What is the difference between an error and an exception?

A. An EXCEPTION is a transaction that kicks out on the exception report needing to be looked at by the ERT auditor, that transaction may or may not be incorrect and/or need further action from the SPO. An ERROR is issued by the ERT auditor when a transaction has been entered incorrectly and shows as an exception on the exception report. Most often, the SPO will need to take corrective action to fix the error and will be receiving feedback to do so by their ERT auditor.

Q. Could we use the multiple entitlements function for Hazardous Duty Incentive Pay - Vessel Boarding Search & Seizure (HDIP-VBSS)?

A. This is being researched and is dependent on the new Multiple Entitlements functionality in Direct Access, but this will be addressed with the member who asked this question. There will be more information to follow on this topic.

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Looking for more Pay and Personnel news? Check out the PPC News Feed at http://www.uscg.mil/ppc/alspo/.

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Q. Do you have to ask for each exception to be removed from the SPO Exception Report once they've been resolved?

A. No, the ERT auditor will take action once all proper transactions have been submitted by the SPO. Please do not ask an ERT auditor to remove an exception from the report. ERT auditor's remove (kill) transactions when all feedback has been completed and an account discrepancy is being sent to a Pay Team, or when no further corrective action is required. **Note**: Marking something SPO Action Complete does not remove the transaction from the Exception Report.

Q. Can we add a remarks block in the details for entitlements to explain specific situations to prevent errors on the SPO Exception Report? For example: Member went TDY, galley closed, etc.

A. Any changes to Direct Access (off the shelf product) cost money, but we can definitely ask the programmers if it's a possibility.

Q. Can PPC put an article in the SPO Newsletter about how we are de-emphasizing the SPO Metrics?

A. Yes. We will work on that.

Q. Why do we get questions about transactions that happened 3 years ago?

A. Whenever an auditor is researching an exception, they look at the member's entire history in Recents to see if any other transactions were affected.

Q. If member is departing to a DIFDEN unit, what ACIP should be on the departing endorsement?

A. DIFDEN, the ACIP type of the new unit.

Q. When the ERT Feedback is to "verify" something, why can't the auditor just email the SPO Chief with the question?

A. It will be too much work for each auditor to stop in the middle of working their report and email the SPO Chiefs for each exception/error.

Q. Do you need to have the CGHRSUP Role in DA to use the manual row switch?

A. Yes.

Q. If you start an entitlement and someone else stops it, why does it still show your name on the exception, and not the person that stopped it?

A. This is a known programming issue.

Q. How do you account for when a member takes leave in the middle of a Discount Meal Rate (DMR) – Remove Missed Meals (RMM) period?

A. The leave transaction will record the DMR, but the YN must make sure they don't include meals for their leave days in their total count.

Q. Some commands are using the SPO Metrics as a disciplinary tool rather than a training tool. Will that ever change?

A. Yes, hopefully soon. Some commands are making a much bigger deal out of the SPO Metrics than they really are.

Q. Why do some ERT auditor's email and others don't?

A. It depends on how the auditor works their report. They each do it a little differently.

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Q. What does changing the exception to "SPO Action Complete" actually do?

A. It removes the exception so the SPO can no longer see it, but it will remain on the report until the ERT auditor removes it.

Q. Should a member file for parentage through their state or the state where the child was born?

A. A member must contact their regional legal assistance who will make that determination.

Q. If a member is not listed on the birth certificate, how can you prove their parentage?

A. Official DNA results, Paternity acknowledgement in accordance with state law, or a Court Order acknowledging member as a parent (child support order)

Q. For a legal ward, does the court order have to be temporary or permanent?

A. It must be either temporary for at least 12 consecutive months or permanent.

Q. How does legal determine over 50% support for parents?

A. PPC Legal sends an affidavit package to the parents and uses the information received to calculate/determine support.

Q. Do parents have to be in DEERS first or have legal do the BAH dependency determination first?

A. Legal must do the dependency determination first, then they will forward the package up for DEERS determination. It's the same process for adopted children and legal wards.

Q. What would be the benefit of adding your parents as dependents, if you already have children and are claiming BAH with dependents?

A. There won't be an increase in your BAH, and your parents won't qualify for Tricare benefits, but they can receive PCS entitlements, commissary/exchange benefits, you'll get an additional room for them in government housing, and some military bases have some medical care that is no charge for dependents.

Q. If a member has a pre-adopted child but their name is not on the child's birth certificate, and the state kept the original birth certificate with the biological parents' names, how do you enter that child in DEERS?

A. If the original birth certificate is not available, an adoption placement agency recognized by the Secretary of the Department* concerned may certify the child's birth date. The child will be entered in DEERS in a temporary status. DEERS status will be updated to Permanent when PPC receives the court issued birth certificate.
*The Secretary for the Coast Guard falls under the Secretary of Homeland Security.

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- Paying It Forward Best Practices-

1. Always check the service dates tab any time you are adding, deleting, or changing a contract.
2. When entering the Oath Administered Info during an Accession, make sure you put the member's Home of Record in the City and State.
3. Make sure the member signs their contract on the date of their enlistment.
4. If there is an error in the contract, it must go to the Board for Correction of Military Records (BCMR) for correction.
5. Ensure you have the signed contract in front of you before you begin a hire/re-hire.
6. Never create a new Requisition number. If there isn't one or you can't get it to open, contact PPC.
7. Excess leave does not mean extra leave that can be sold. It is leave taken that cannot be earned. The member is in the hole.
8. Inputting and approving separation documents and statements of intent on time will allow JUMPS to calculate the final pay to the penny.
9. Every time you start Career Sea Pay Premium, it shows up on the SPO Exception Report. This is an information error since the start dates are frequently incorrect.
10. Make sure you do your research before contacting PPC. Many determinations can be done at the SPO level.

239 attended the 2011 PPC YN Symposium

Quality Assurance — Track 3

Q. Are there instructions for package submission?

A. Yes, view the BCMR web page, complete instructions and documents to be submitted are outlined, including info for the SPO.

Q. Members have contacted SPO's with copy of BCMR ruling, what is the process to get the info to PPC?

A. The Unit or SPO can scan/email document to PPC(SES), Attn: Bill Schirmer. However we cannot take any official action until the documents are received via the official process. Sometimes that may be several weeks.

Q. Once the process is complete, how long until member is notified the case is complete and they receive word of results?

A. Sometimes the process at PPC is very quick, within a couple weeks and others may take up to 60 days depending on the complexity of the case, whether records need to be corrected and sometimes programming needs to be completed prior to payment computations. However the member can contact PPC (SES) direct and we will advise of the status.

Q. A SCPO was denied advancement to MCPO, filed BCMR case. What is the CG policy on going to BCMR?

A. Every BCMR case may be unique. Encourage viewing BCMR web-site and review "Advancement" cases in assisting members with application.

Q. DA allows Federal and State tax deductions, can DA be programmed to allow "CITY" tax deductions?

A. Advised member to submit PPC Customer Care help request. It will be routed to the appropriate branch at PPC for review.

Q. What is appellate Leave? Are members entitled to ID card/benefits?

A. Upon completion of court martial, a member is placed in Appellate leave pending review/approval of trial. They get ID card for MTF medical treatment…no pay or allowances beyond what regular leave they have on the books. Members may be on Appellate leave for 2-3 years.

Q. After confinement and member remains in the CG, what happens next?

A. PPC is the SPO for confinement 90 days or greater. If member remains in CG, PPC will forward the PDR back to the unit SPO.

Q. If a member is contact by the BCMR for additional information but does not respond to them, what is the time frame and what happens next?

A. The BCMR will put a response date in their letter, if a member does not respond by that date, the case will return to the board for decision without any further information from the member.

Q. Can a member cancel a BCMR package already submitted?

A. Yes, they contact the BCMR directly. They can even cancel a request after final decision and payment has been made to member.

Q. W2 – What is the cutoff for address changes in DA?

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A. End-of-month cutoff December.

Q. If a member reports that some military service or retirement points are missing, what is the process for correction?

A. If military service, other than CG is missing, members must submit documentation of that service to PPC. PPC (SES) web-page outlines procedures and required documentation to be submitted. If CG service is missing, check JUMPS to see if a SEG 81 is in system for that period of missing time. If not, submit PPC help ticket and identify the period missing and we will use JUMPS to build the SEG 81 documenting the service and points earned during period.

Q. What determines a Reservists Anniversary Year (AY)?

A. If there has been no break in military service it will be the date of first enlistment into military service. If there is a break in service, then the AY will be the day the member returned to military service.

Q. What is the 16/18 years policy concerning Reservists and is there a process to identify them?

A. Reserve Policy Manual states that a Reserve member may not perform any AD that would calculate to over 16 years of active military service without approval of CG-131. Members with over 16 YOS may not complete any AD that would calculate to over 18 years of service without CG-131 approval. Policy exists due to LAW that once a reserve member completes over 18 years of AD military service, they cannot be involuntarily RELAD and can remain on AD for completion of 20 AD years to earn a regular retirement.

Q. What is the path for the Reserve Retirement Point Statement in DA?

A. AdministerWorkforce>AdministerWorkforce>View>Reserve Points.

Q. Why is the Advancement Authorization be kept in the PDR beyond the latest advancement?

A. The PDR instruction states that only the latest authorization be kept, but for Audit purposes, the last 2 years documentation should be retained. PPC (PPI) is trying to have the policy changed in the instruction.

Q. eiPDR - With the new imaging initiative, does that mean no more paper records?

A. The goal is to do away with paper forms and do everything on-line. All forms will be on the computer and scanned to imaging. All source documents will be scanned and kept in the imaging database.

Q. eiPDR - If we are getting away from paper, what about travel audits?

A. CWO Benbow (PPC-TVL) is working on that issue, we are aware of the concern.

Q. What kind of time frame will be set for electronic forms to be approved and processed?

A. The command or YN must establish a smooth workflow between the command and other YN's at the SPO.

Q. Is a FSGLI form required when member has no dependent spouse only children?

A. No, dependent children are automatically covered.

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Q. Isn't the source documents issue a Recruiting/Tracen Cape May issue?

A. Yes, new enlisted member source documents are being placed in the PDR by Cape May?

Q. Once documents are scanned into the eiPDR, can they be printed at a later date?

A. Yes, currently they are viewable/printable from image now.

Q. If SPO errors are low, why are we continuing to audit data?

A. Yeoman transfer in/out of SPO's, circumstances are always changing so continuing to audit, at least for the near future, will continue to monitor errors.

Q. The 3PM states the requirement for submission of the SGLV 8285 for electing coverage or increased coverage for previously declined or decreased coverage. Is this still required?

A. No, the SGLV 8286 has been updated to incorporate these elections and the SGLV 8285 has been deleted by the VA. Updated information has been received and will be incorporated into next change to 3PM.

Q. If a member is in process of a divorce, can they stop BAH/With before final divorce?

A. Yes, the member can notify the SPO with the expected final divorce date and request to change BAH entitlement. The official divorce decree should be submitted by the member when finalized. Re: 3PM, Art 5.B.1.

Q. Would it be possible to program DA to assist in annual verifications/validations of BAH/SGLI elections, maybe self-service entries similar to how Reservists validate annual ASQ?

A. Will explore idea with PPC staff.

Q. SPO Pilot program – At what level will YN's be at field units?

A. That depends on several factors, with the pending SPO realignment, it would depend on how many YN's will be available to reinvest in other positions.

Q. SPO Pilot program – With what could be some drastic changes in YN roles/responsibilities, will there be any proper training?

A. Slowly creeping imaging out right now, the hope is to get information out as it becomes available, hopefully it will be a gradual implementation.

Q. SPO Pilot program - What is the time frame for the first phase?

A. Boston, then Seattle hopefully at the end of this year. Next will be Miami, beyond that has not been determined.

Q. Where will I be transferred if my SPO is one to be eliminated?

A. That would depend on the realignment, to be determined.

Q. We hear there is debate on a Yeoman name change?

A. That would need to be addressed to YNCM Jennings.

- Quality Assurance Best Practices-

1. Pay close attention to details.
2. Always refer to current directives and follow proper procedures: SPO Manual/3PM/Personnel Manual/Pay Manual.
3. Communications, communications, communications.
4. Review PDR of newly reported members.
5. Command follow-up concerning supplemental advancement procedures.
6. Research members DA records to ensure proper payment of pay and entitlements.
7. Communicate confinement issues with PPC to ensure proper procedures are being followed.
8. Attend Reserve all hands with PDR and review with members.
9. Print current point statements, and review with each Reservist.
10. Become familiar with Reserve processes, review applicable publications and directives.
11. Using Point Statements to ensure accurate awarding of Reserve Good Conduct awards.
12. Review and check member entitlements to ensure proper payments.
13. Conduct in-house training on entitlements.
14. Conduct training on using/understanding/importance of following references.
15. Read applicable references thoroughly to ensure accurate interpretation for starting/stopping pay entitlements.
16. Use the SPO Manual to run reports.
17. Slow down, be precise, and review policies and procedures before clicking "save".

Mr. William Schirmer (left), PPC (SES) and Mr. Charlie Bartocci (right), PPC (P&D) provided information on BCMR issues and other topics at the 2011 PPC YN Symposium

Tools and Resources — Track 4

Q. Who updates or edits Coast Guard forms?

A. PPC approves and sends to Headquarters because we now have to pay contractors to update our forms.

Q. How do you correct a wrong OPFAC?

A. Submit a Customer Care help ticket.

Q. Can we e-mail CG-7421(series) forms to Customer Care?

A. It is not recommended, however, the form will still be processed. When CG-7421 forms are faxed to PPC, they automatically load into an electronic file instead of actually being received via a fax machine. Please allow 5-7 business days before your form is processed. Designated personnel in Customer Care do have access to view the file and confirm if a form was received.

Q. Does DA generate a DD-Form 4/1 after completing contract data in DA?

A. No, the YN need to create it using Forms.

Q. If you forget to write down the Applicant ID before we start working the contract data, how do you get it?

A. The easiest way is to use the open a new window link and navigate back to get it.

Q. When we do a re-hire on a member, why is his applicant data blank, when it should be in the system already?

A. This is a known error. The information should carry it over but if it doesn't, you'll need to re-enter it through the regular application (not during the re-hire).

Q. Can you start tax information and direct deposit on the same day as the hire/re-hire?

A. Yes, now you can.

Q. How detailed can information be for blogging on the YN site?

A. Doesn't seem to be any problem with posting questions from the SWE exam on the blog.

Q. If two members share a hotel room and split the cost but only one pays with their credit card, will the member get fully reimbursed?

A. If it is authorized in the orders and a statement regarding "double occupancy" is in the remarks section, then the member will be reimbursed.

Q. If two members each have a hotel room but only one pays with their credit card for both rooms, will the member get fully reimbursed?

A. As long as it states in the orders that the member paid for both rooms, then they will get reimbursed.

Q. Will T-PAX (Citrix) ever move to automatic login?

A. No because Citrix will eventually be obsolete.

Q. When entering an older competency, why do we have to delete all competencies and then re-enter?

A. CG-6 is currently addressing that issue.

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Q. When submitting a help ticket to Customer Care, does the POC information not reflect in the HEAT ticket?

A. Occasionally the POC information does not transfer with the HEAT therefore it is always a good idea to repeat the POC info in the remarks section.

Q. Can a member contact Customer Care instead of the YN?

A. Yes, however, they should be advised to contact their YN first because certain processes must be completed by the member's SPO, not PPC.

Q. How does Split Disbursement work on a paper claim?

A. Check the box on the top of the claim and highlight it to bring attention to it so PPC will notice it for processing.

Q. Is it authorized to send travel claims through FedEx?

A. The Postal Manual states it is not recommended, however, some sort of tracking is recommended. Unit funds cannot be used to send claims via FedEx however, a member can personally pay to have their claims sent that route.

Q. Who can change the order dates in T-Pax?

A. The default AO.

Q. What is the turnaround time for PCS claims?

A. 30 days, however realistically four to six weeks to accommodate for delay since claims must be mailed.

Q. Member requested travel advance but never received it. Should they still record travel advances on their claim in block 9?

A. No. Only if member actually received advances would they claim it in block 9.

Q. What address does a paper claim get returned to?

A. The address on the travel claim.

Q. How do you complete a Dependent Travel claim?

A. Either, submit a separate claim with the dependents box checked in block 4 <u>or</u> input the dependent's itinerary on the same claim as the member with a few spaces between both itineraries.

Q. Does it matter what amount is entered in T-PAX in the orders tab for cost of GTR?

A. Yes. Reimbursement for travel will only be for the amount of GTR <u>or</u> actual cost of travel if <u>less</u> than GTR.

Q. Where does travel get their GTR quotes from?

A. City Pairs

Q. Is Customer Care ever open on the weekends?

A. Yes, when the reservists drill. There is a schedule published on PPC's website when the call center is open on the weekend.

Q. Any issues with auto-forwarding claims to AO?

A. There currently is a problem with auto-forwarding. Otherwise, the problem normally

(Continued on page 17)

(Continued from page 16)

exists if the member is no longer authorized to be an AO or just isn't the member's AO anymore.

Q. Does an AO receive notification when their privileges are about to expire?

A. Yes, they should receive notification.

Q. Why does DA seem to take a long time to e-mail orders to myself?

A. Try it twice and then contact customer care if it doesn't work. There are a lot of changes happening with DA, therefore, processes are sometimes taking longer than usual.

Q. Should the "Hot Save" feature be used in T-PAX?

A. Using the Hot Save button is <u>not</u> recommended.

Q. What is the Release Obligations checkbox in T-PAX?

A. It doesn't do anything.

Q. Is Web T-PAX time sensitive?

A. Yes. Try to complete your claim before leaving the application idle.

Q. Is the Ticket Status link still available?

A. Yes. It is available on PPC's Travel website.

Q. What is a change notice?

A. SSIC three years in the same SSIC file but separated by date.

Q. When does electronic filing come in?

A. The Navy already does and we expect to in the future.

Q. Are unit PDRs mandatory?

A. It is optional, however, the mission of your unit.

Q. Is it required to maintain dead files?

A. No, dead files should be maintained the same as PDRs.

Q. Do you want designation memos in SSIC files?

A. Yes. Original or copy must be in general correspondence files. * Directives must be properly formatted.

Q. What constitutes a mail clerk for designation purposes?

A. Anyone that handles mail.

Q. What about FedEx and UPS?

A. Yes, members must still be designated as mail clerks.

Q. What if all YN's in the office were recently appointed as mail clerks?

A. Everyone must have a designation letter.

Q. What about civilians handling mail including Auxiliarists?

A. Yes, civilians also need a letter of designation.

Q. Why are handwritten addresses not allowed on mail?

(Continued on page 18)

(Continued from page 17)

A. To avoid problems during the sorting process such as not being able to read part of the address.

Q. Does the Commanding Officer have to initial the bottom of the CG 4910?

A. No, it can be the YN filling out the CG 4910.

Q. Does a CG 4910 need to be filed in the Unit Punishment log when the member does not go to mast?

A. No. It is not necessary.

Q. What is a urinalysis observer does not have a designation letter?

A. They cannot be an observer unless officially designated via letter.

Q. Does the urinalysis designation letter have to list their name?

A. Yes. The person must be designated by name.

Q. If a member is tasked to be a urinalysis observer without a letter of designation, can they refuse to be an observer?

A. Yes. Designation must be in writing.

Q. What if a YN sends an e-mail to the Govt Charge card coordinator to lower a limit and no action is taken?

A. Address it through the Chain of Command for action.

Q. When can a member be placed on weight probation?

A. After the CG 650 is signed

Q. Do the new SGLI forms need to be in the PDR?

A. Not immediately but should eventually.

Q. Are signatures required for an initial FSGLI election?

A. No, it is automatic. Signature is required when increasing or decreasing coverage.

Q. Is the spouse's signature required when member is declining FSGLI coverage?

A. No. Only the member's signature is required.

Q. Member declined FSGLI in 2009 but a letter was never mailed to the spouse. How should the letter be dated if it is mailed now?

A. Use the current date when preparing the letter, however, remove the "120 day" conversion statement.

Q. What should we do when we've run a department role query and find members who should not have certain roles in DA?

A. Submit the revocation form. If one was submitted and roles were not removed, submit a help ticket to PPC.

Q. Can we obtain an old inspection report?

A. Yes, however you must have a valid reason to see the report. For example, if you have PCS orders to a new unit and want to the report, then state that in your e-mail request.

Q. What do you do with Directives once they are cancelled?

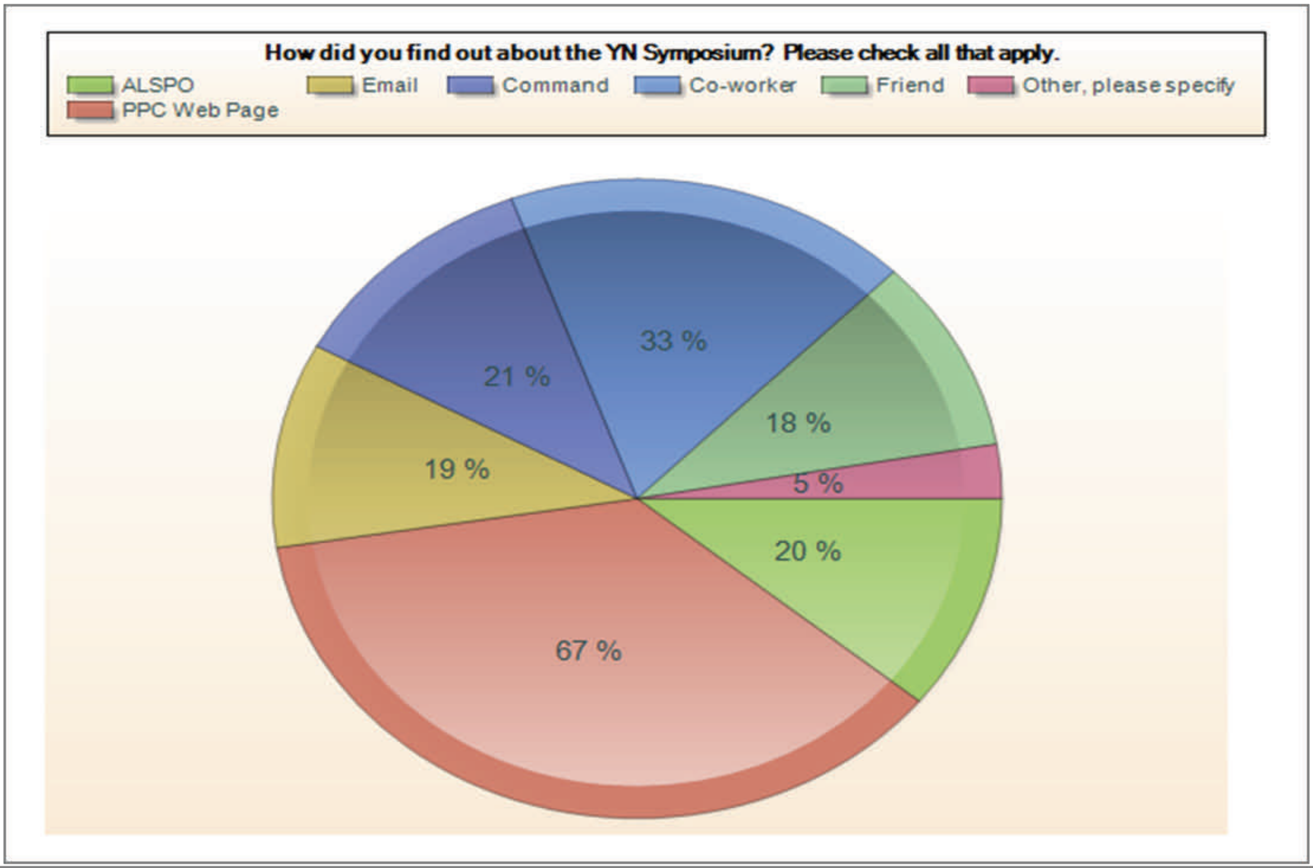
A. Send them to the Records Center.

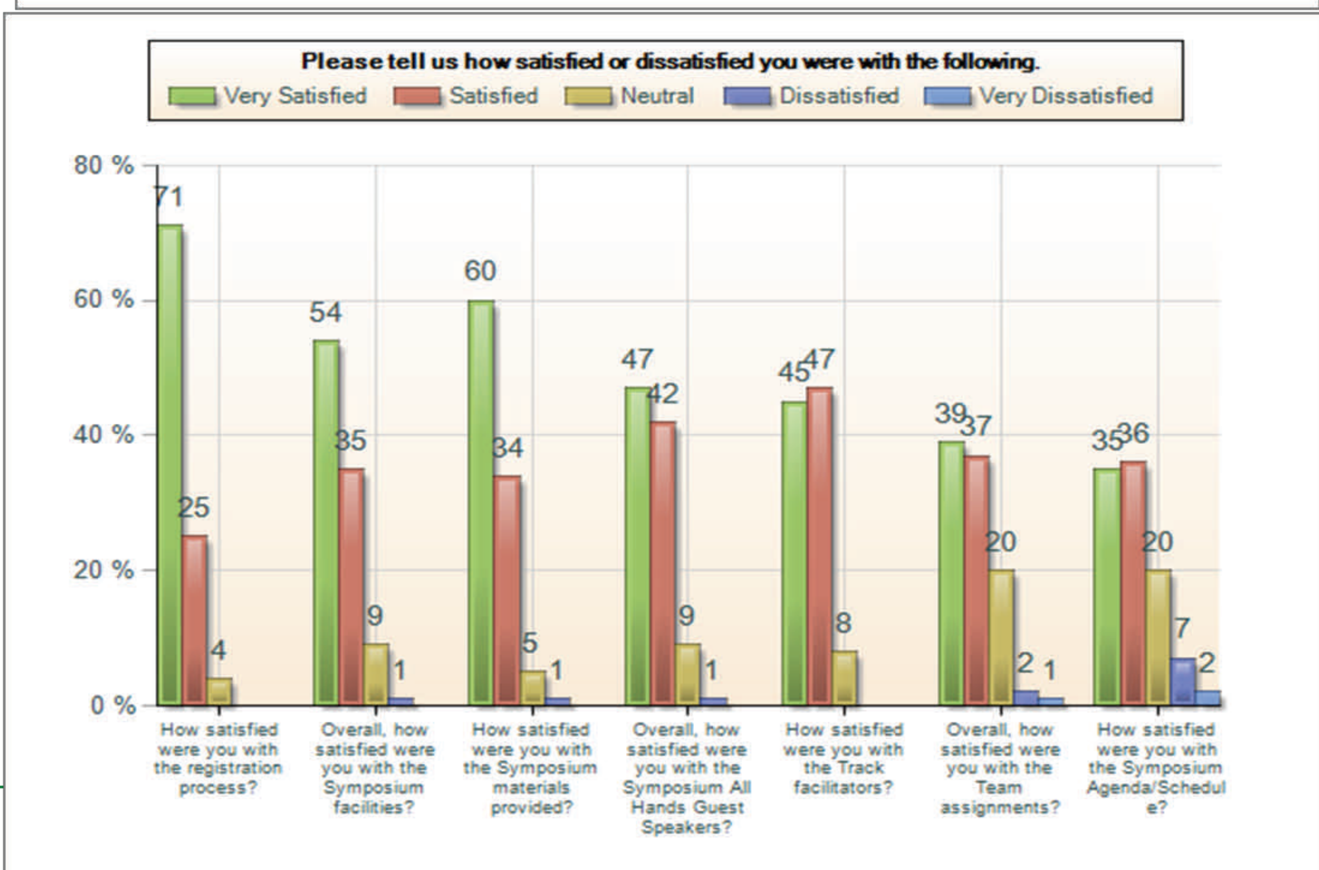
- Tools and Resources Best Practices-

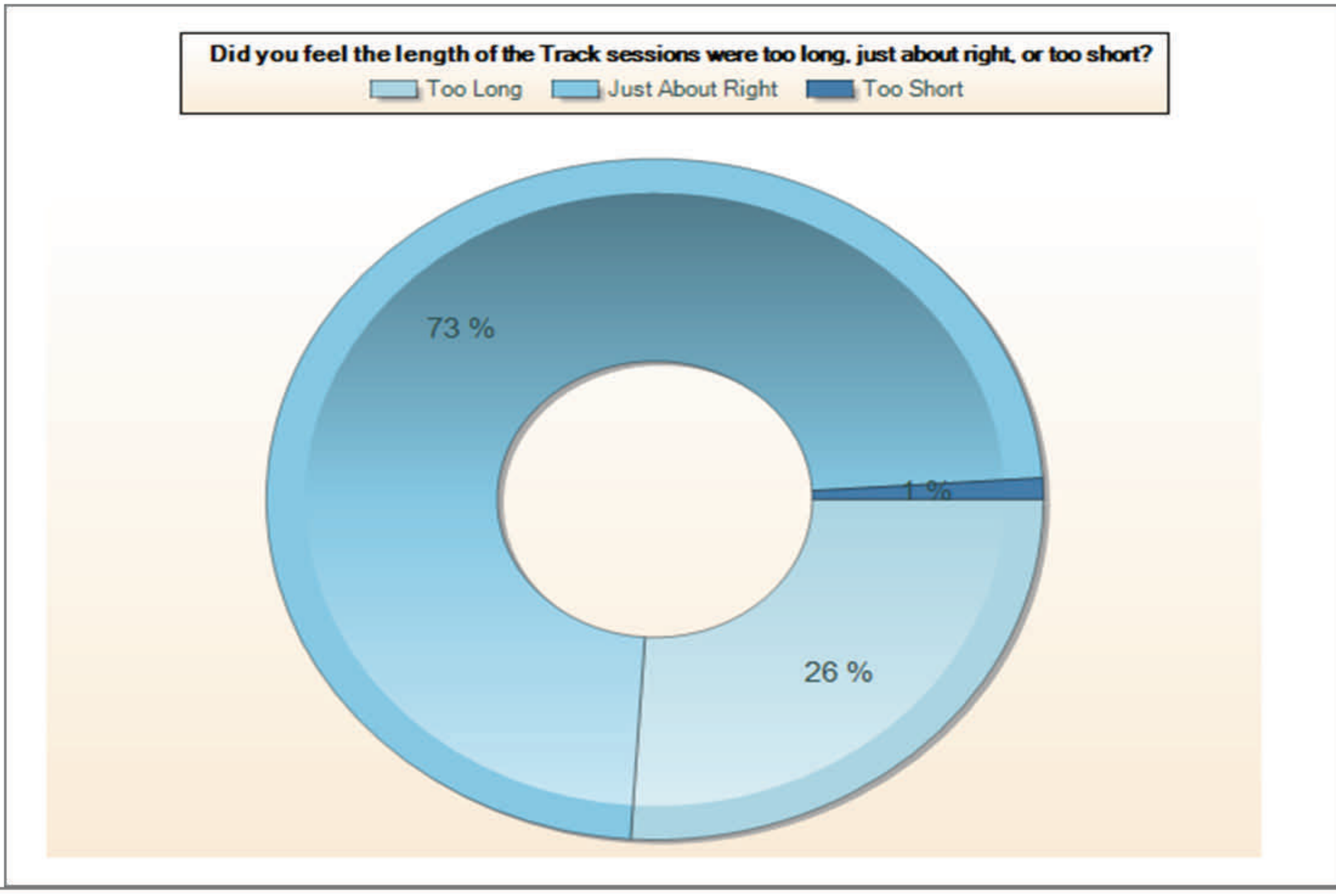
1. Consistently check the PPC website for updates.
2. Read the ALSPO messages to stay current with changes.
3. Always repeat the POC information in the Help Ticket remarks.
4. Visit the website http://cgweb.pacarea.uscg.mil/pf/fc7/fc-752/default.asp to view the most current checklists.

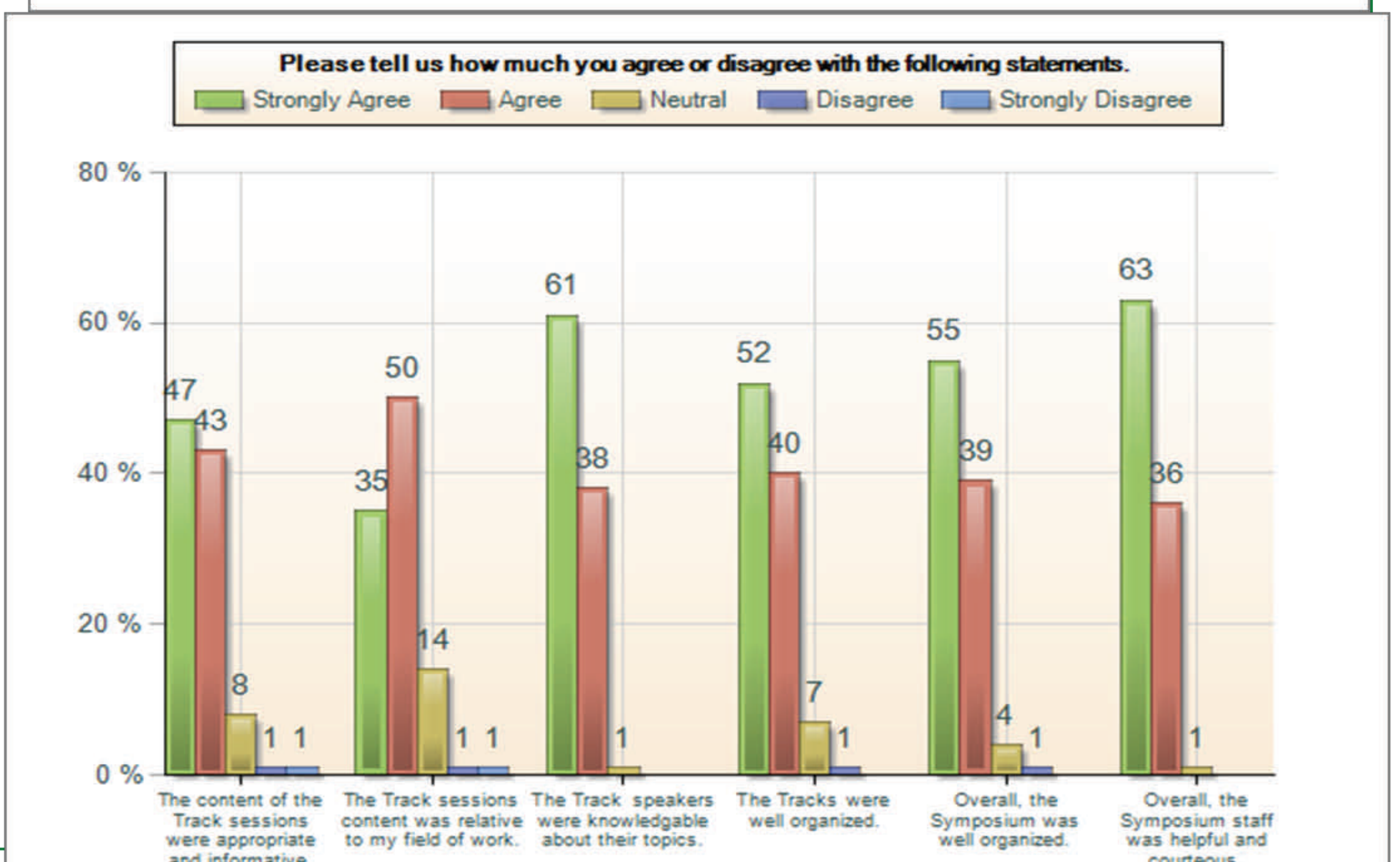
YN1 Matt Smith, PPC (CCB) presented 2011 PPC YN Symposium attendees with best practices for contacting PPC Customer Care

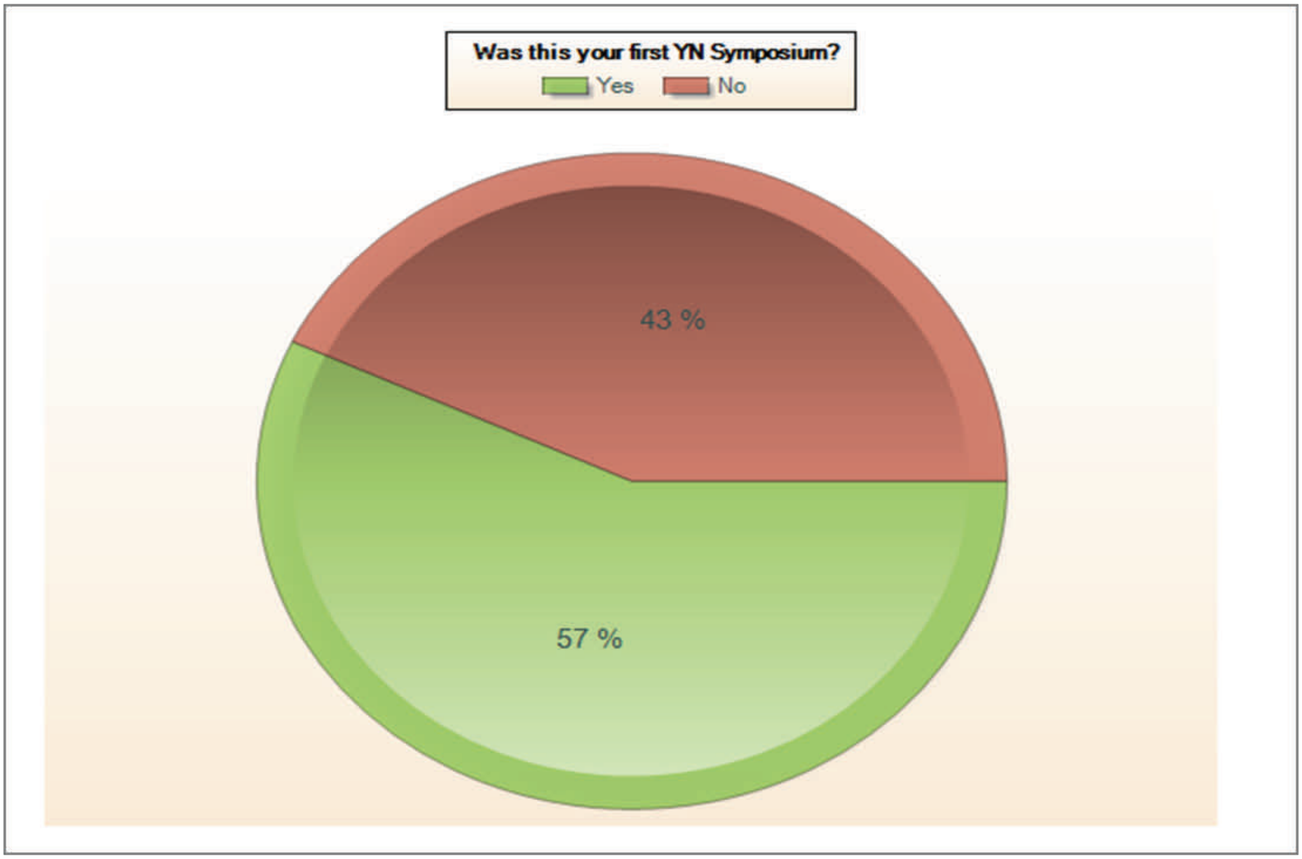
- Survey Statistics -

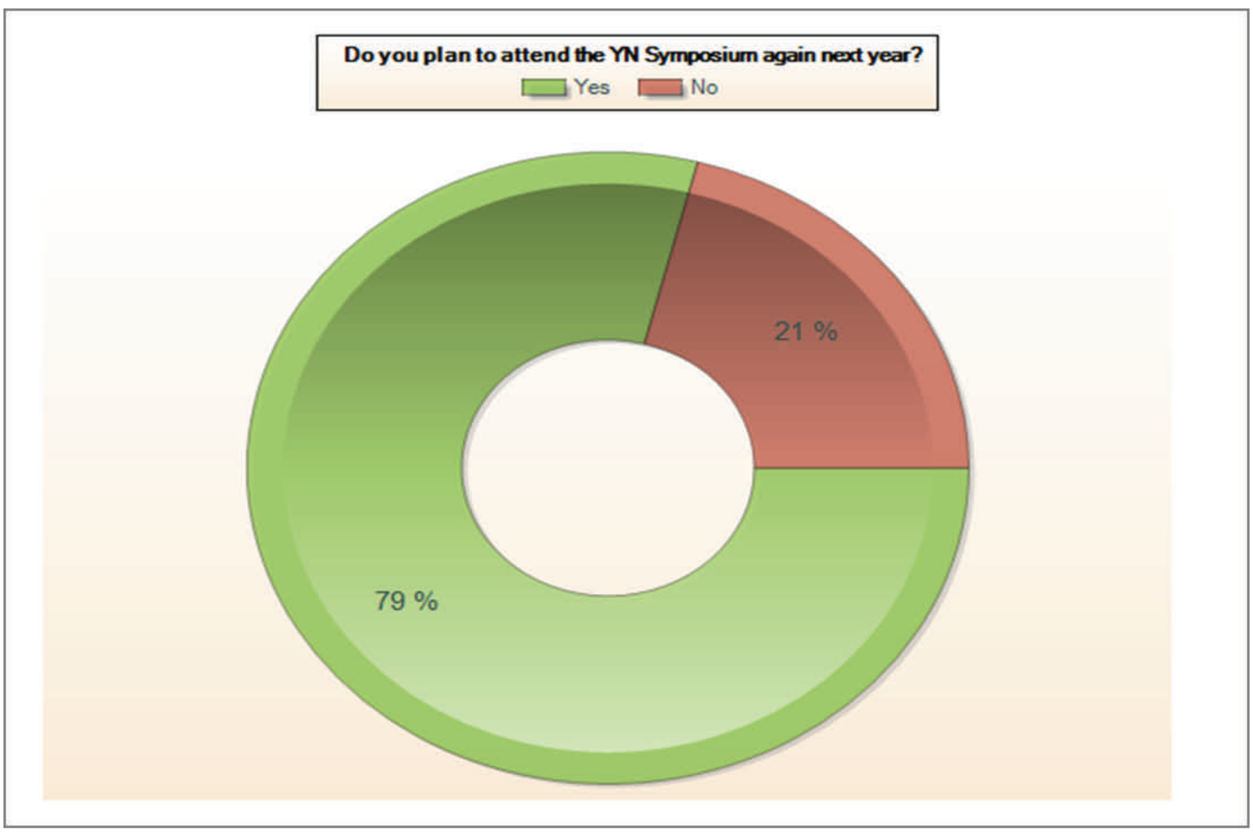


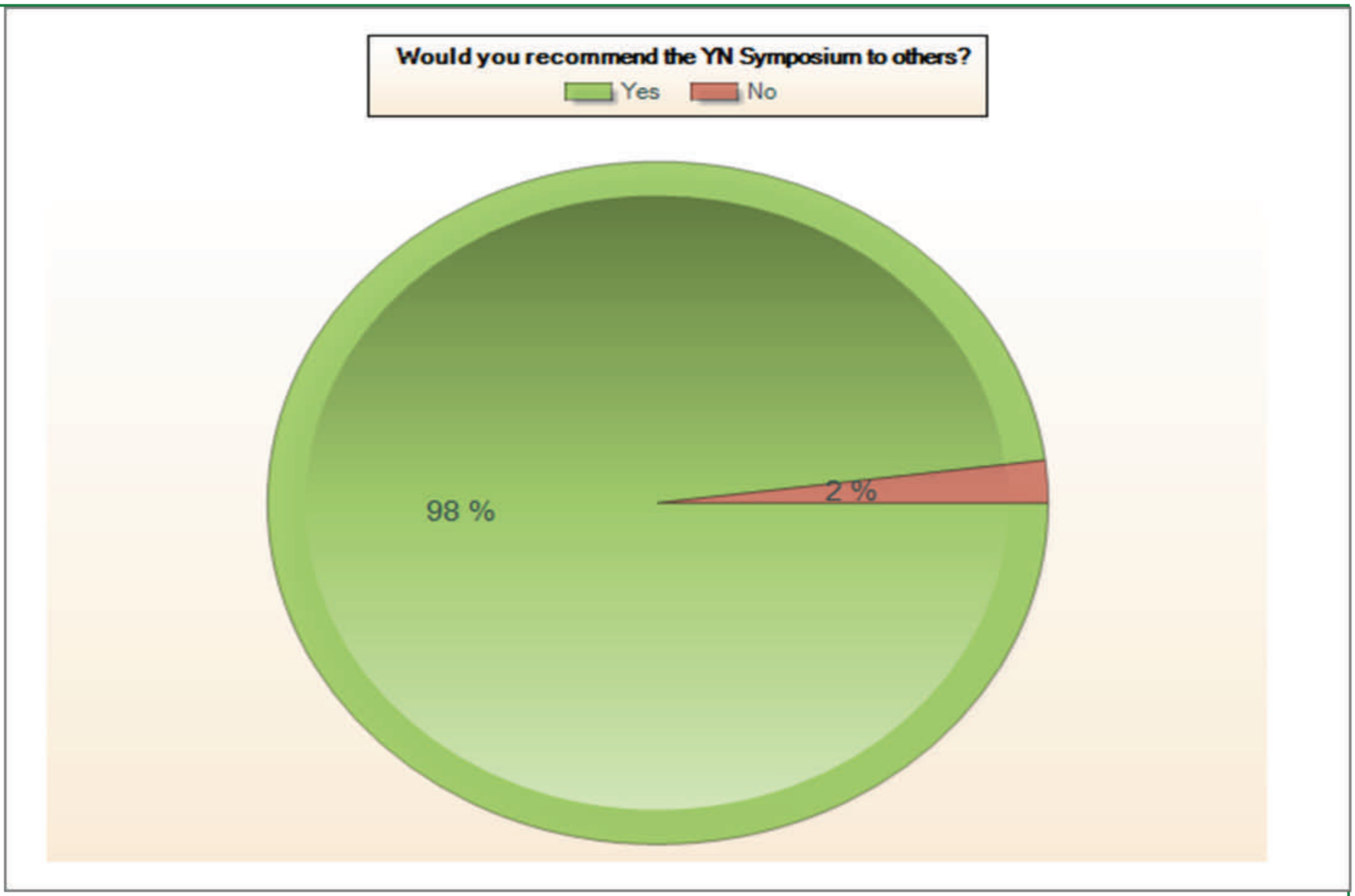


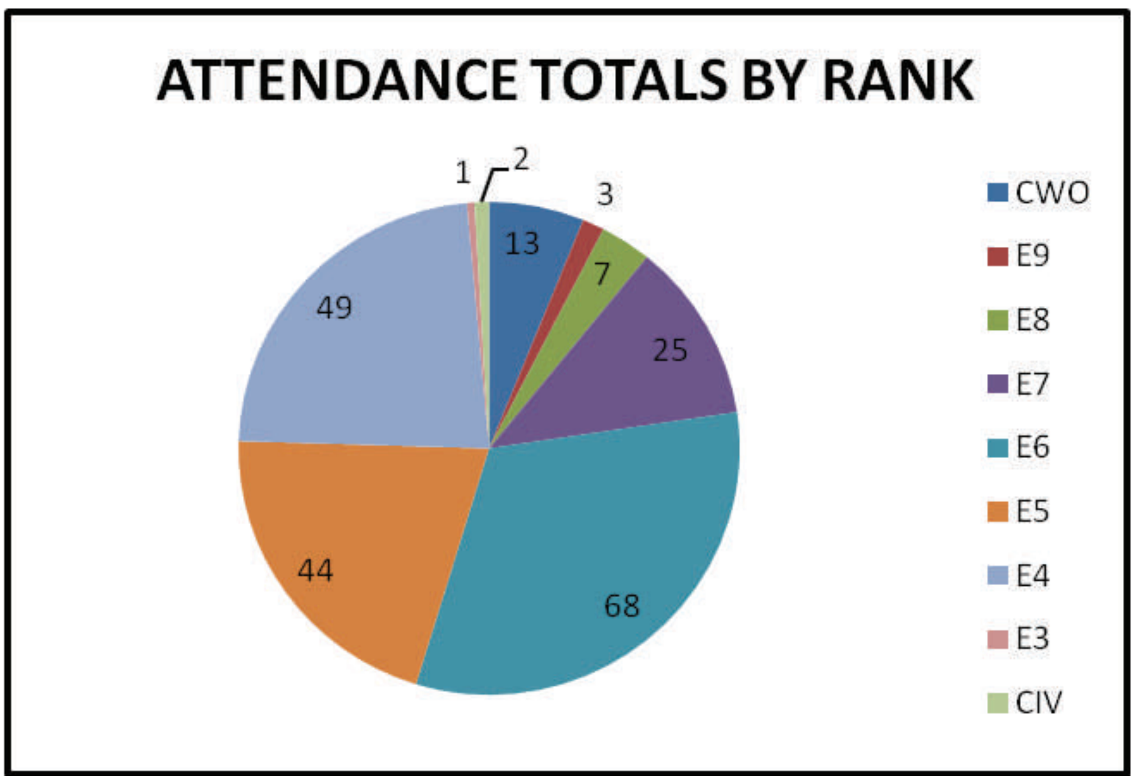

Did you feel the length of the Track sessions were too long, just about right, or too short?
Too Long
Just About Right
Too Short
73 %
1 %
26 %


Please tell us how much you agree or disagree with the following statements.
Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree
80 %
60 %
40 %
20 %
0 %
47
43
8
1 1
35
50
14
1 1
61
38
1
52
40
7
1
55
39
4
1
63
36
1
The content of the Track sessions were appropriate and informative.
The Track sessions content was relative to my field of work.
The Track speakers were knowledgable about their topics.
The Tracks were well organized.
Overall, the Symposium was well organized.
Overall, the Symposium staff was helpful and courteous.


Was this your first YN Symposium?
Yes
No
43 %
57 %


Do you plan to attend the YN Symposium again next year?
Yes
No
21 %
79 %


Would you recommend the YN Symposium to others?
Yes
No
98 %
2 %


ATTENDANCE TOTALS BY RANK
1
2
3
13
7
25
68
44
49
CWO
E9
E8
E7
E6
E5
E4
E3
CIV

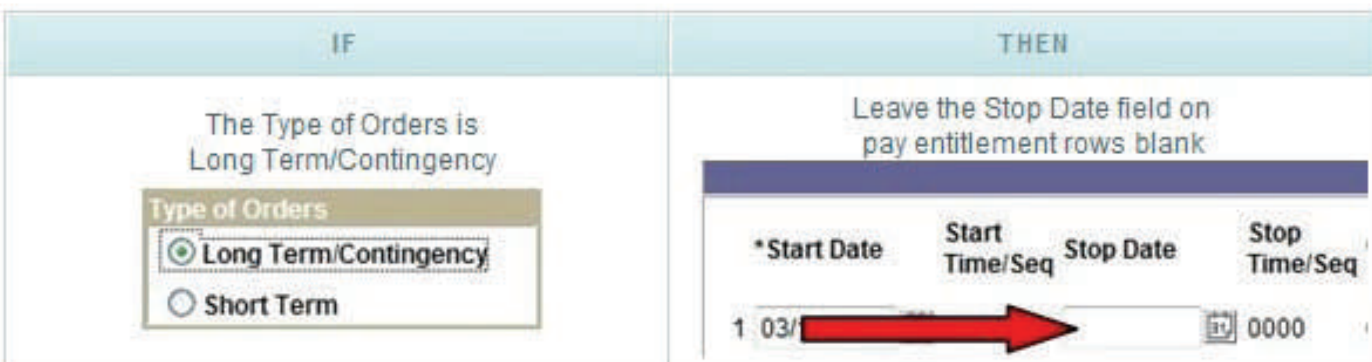
No Need for Stop Dates on Pay Entitlements Started for Members on Long Term AD or Contingency Orders

PPC (mas) Welcomes a New(?) Military Pay Systems Specialist

Hello all! My name is Sean Hayes. I've taken over for Steve Maupin, who retired after many, many years of service to the Coast Guard and PPC. A little about myself: I am a retired YNC, after 21 years of active duty; I spent two tours here at PPC in various functions, spending time in Travel, Exception Review (ERT), Planning, Process Improvement (PPI), SES, and back to ERT. I'm excited about stepping into Steve's legendary shoes and once again serving the Coast Guard. I bring extensive knowledge of pay and personnel, JUMPS, and Direct Access (DA). I encourage you to contact me if you have questions. I'd rather you ask me a question and we work things out to do the right thing first rather than having to clean things up!

According to Part VII (Reserve Unique Transactions), Chapter 4 (Reserve Active Duty Orders) of the Coast Guard SPO Manual (PPCINST M5231.3), when entitlements such as BAH and COLA are to be submitted in conjunction with the call up, you are to leave the stop date **BLANK**. If you put a future date for the stop date (such as 9/30/2012), the system adds the entitlement to my Resync report so that I can investigate why there is an entitlement open in JUMPS and closed in DA.

The reason you should NOT put a stop date in the row in DA is that when you process a Release from Active Duty (RELAD) separation, the row will close in DA and the segment close in JUMPS based on the date of the separation.



As a segue toward getting things right, I'm encountering issues I think are easily correctable. Each update/compute cycle, I get a "Resync" report. This lets me know when there are pay entitlements (segments) open in JUMPS, but have a closed pay entitlements row in DA. What I've encountered is that when Reserve Members are called to active duty (Long-term/ Contingency Orders) for terms generally longer than 139 days, there is an L68C (Endorsement on Orders transaction) generated for JUMPS. This document will provide JUMPS the necessary information to set the member's segments.

I look forward to serving the SPOs as I move forward in my new position. I hope that I can impart my knowledge that will help shape future YNs and make life a little easier for those of you that have been around a while!

Sean Hayes
Military Pay Systems Specialist
Military Accounts Support (MAS) Branch

Note From PSC-PSD-MR on Electronic Document Submissions

All SPO Personnel;

We've been using the *DOCS* folder (e.g. Transmitting scanned documents for the EIPDR via email to **ARL-PF-CGPSC-PSD-MR_DOCS** per the procedures in Part X, Chapter 4, of the CG SPO Manual, PPCINST M5231.3(series)) a little over a year now and I have some things I need to pass to make this electronic process easier for all of us.

PAPER....PSD-MR still receives too much paper by mail from units that have scanning capability. Although certain sections of COMDTINST M1080.10I (PDR Manual) and the SPO Manual still say to mail items such as separations packages, they can and should be submitted via the DOCS folder. We're in the process of submitting a request to have these sections of the manual changed. In the meantime, sending anything to PSC-PSD-MR that gets included in the EIPDR can be sent through the DOCS folder. I can't order it, but I highly recommend it.

UNAUTHORIZED DOCUMENTS...Make sure what you send is AUTHORIZED to be in the EIPDR. The only way to know this is to read the manual. Don't guess or assume. The entire list of what's authorized to be in all the records is in Enclosure (1) of 1080.10I. Currently over 25% of what we receive through the DOCS folder is NOT AUTHORIZED to be in the EIPDR. I'll be blunt...this has to stop. You have the guides and we waste a lot of time cleaning out unauthorized documents being sent. Please read the enclosure and stick to your guns if someone tells you they want a document placed in the EIPDR that you KNOW is not authorized. I know that can be tough, but command support on the SPOs end is very important.

DUPLICATES....We are receiving many, many duplicate submissions. Unless asked specifically by PSC-PSD-MR, DO NOT RESEND documents you have already mailed/emailed for inclusion in the EIPDR. We know the folder is set up to get things entered in 14 days, but just because you don't see a document in a record you might have sent earlier, does NOT mean we need you to re-send another e-mail. If you don't receive an email failure message that says your e-mail wasn't delivered, it got here! Due to the large increase in PDR document submissions over the last several months, we are currently unable to meet the 14 day window to get all documents into the EIPDR. Because of this, you may have checked the EIPDR after 2-3 weeks and discovered your documents were not yet in the system. That doesn't mean we didn't get them. Please DO NOT resend any e-mails through the DOCS folder unless we actually tell you to do so.

DOCS QUALITY...Make sure you follow the guide about submitting documents through the DOCS folder in the SPO manual. Look at what you send us as if you were PSC-PSD-MR. We receive too many documents that are too dark, too light, smudged, upside-down, or can't be read. If you can't read them, what makes you think we can? Make sure what you send conforms to the old saying about 'garbage in, garbage out'. If it isn't right on your end, it won't magically become right when it arrives here.

URGENT ENTRIES....If you need documents to go into the EIPDR immediately (i.e. board, panel, etc.), please let PSC-PSD-MR know this by contacting us directly before you send. I'll tell you to forward it straight to me or the APM.

RECORDS POCs....Your POCs here in PSC-PSD-MR can answer any questions you have. PLEASE use us if in doubt about anything. We are Mr. Harrison Morten at 202-493-1670 (APM and first choice) and Mr. John Evans at 202-493-1661. Thanks for all your efforts. We've come a long way in a short time and all of us need to tighten this up and make our military records system the best we can for all our Coast Guard's people. Call or write if ever in doubt.

John D. Evans
PSC-PSD-MR Project Manager

Computing Good Conduct Medal Eligibility Date

The Coast Guard Good Conduct Medal is awarded for satisfactory service which is defined as proficiency in rating, sobriety, obedience, industry, courage, and neatness throughout such period of service.

An individual is required to perform three consecutive years of satisfactory service to earn this award. Subsequent awards are authorized for each additional three consecutive years of satisfactory service. The three year period starts over anytime the member's conduct or performance do not meet the standards.

When issuing a Coast Guard Good Conduct Medal you need to be sure you are using the correct start date for computing the three year satisfactory service requirement. The period of eligibility begins on one of the following dates, whichever is ***later***:

- Date of entry into the Coast Guard.
- Day ***following*** the previous CG Good Conduct Medal award date (e. g. Member awarded CGGM on 13 October 2009. The eligibility period for the next CGGM begins on 14 October 2009 and ends on 13 October 2012).
- Date of release from confinement following conviction by court-martial.
- Day ***following*** conviction by court-martial (if no confinement is included in the approved sentence).
- Day ***following*** the date non-judicial punishment is awarded.
- Day ***following*** return to Coast Guard jurisdiction if convicted by civil authorities.
- Day ***following*** the end of the marking period in which the member received a conduct mark of "Unsatisfactory".
- Day ***following*** the end of the marking period in which the total average mark in any factor was less than three.

The procedure for calculating the three year satisfactory service requirement is similar to calculating an expiration of enlistment as shown in the following example:

STEP	ACTION	CALCULATION YY MM DD
1	Eligibility period start date: 14 October 2009	09 10 14
2	Plus three years:	+03 00 00
	Result:	=12 10 14
3	**Subtract one day:**	−00 00 01
	Award Date: 13 October 2012	=12 10 13

The Computing Good Conduct Medal Eligibility Date guide provides additional example calculations: http://www.uscg.mil/ppc/docs/ComputingGoodConductMedalEligibilityDate.pdf.

Basic Allowance for Housing (BAH) Rates for 2012

The 2012 BAH rates have been posted on the Defense Travel Management Office's BAH Calculator (http://www.defensetravel.dod.mil/site/bahCalc.cfm). Just enter the zip code for your duty station, your pay grade, and hit the calculator button. A new window will open to display the with and without dependents rates.

If you would like to know what happens to your pay when the BAH rate for your area is reduced from the previous year or how BAH rates are determined, or have any other questions about BAH, checkout the BAH FAQ (http://www.defensetravel.dod.mil/site/faqbah.cfm).

2012 Thrift Savings Plan (TSP) Limits and New Options

Internal Revenue Code (IRC) 2012 contribution limits

You can contribute up to $17,000 in tax-deferred money to the TSP in 2012. If you are a member of the uniformed services (serving in a combat zone), you can contribute a total of $50,000 in tax-deferred and tax-exempt money. If you will be age 50 or over in 2012, you can also contribute up to $5,500 in additional "catch-up" contributions, as long as your regular contributions for the year are expected to reach the $17,000 limit. (The catch-up contribution limit has not changed from 2011.)

Note: Employees may start, stop, or change Catch-Up contributions at any time. Catch-Up elections do not automatically continue, therefore new elections must be made for each calendar year. Coast Guard military personnel should complete form Tsp-U-1-C (https://www.tsp.gov/PDF/formspubs/tsp-u-1-c.pdf) and fax ((785) 339-3760) or mail it to PPC (MAS) to start their 2012 TSP Catch-Up contributions. Mail completed forms to PPC (MAS-TSP):

Commanding Officer (MAS-TSP)
Coast Guard Pay & Personnel Center
444 SE Quincy Street
Topeka, KS 66683-3591

Roth 401(k) Feature Expected in Second Quarter of 2012

The TSP will begin to offer a Roth 401(k) feature in the second quarter of 2012. A Roth 401(k) feature in the TSP will combine all the benefits of TSP retirement savings with the after-tax benefits of a Roth savings plan. You will not get the benefits of tax-deferred savings (an upfront tax deduction) on your Roth contributions as you do with your traditional TSP contributions, but your Roth savings will grow tax-free. When you withdraw your Roth contributions and associated earnings in retirement, you will pay no Federal income taxes on them, as long as you are at least age 59 and a half and have been making Roth contributions for a minimum of 5 years. When the time draws near to implement the TSP Roth 401(k), the TSP will make information available to help you decide whether Roth savings will benefit you (as compared to tax-deferred savings). Direct-Access, JUMPS, the payroll systems of other agencies and the TSP record keeping and accounting systems will all have to be significantly modified to accommodate the Roth feature. The TSP expects to begin accepting contributions the second quarter of 2012.

The TSP has a Fact Sheet available with more information on the TSP-Roth option (https://www.tsp.gov/PDF/formspubs/oc06-5.pdf).

Travel AO News - December 2011

Approving Officials,

Another PCS season (AY11) has ended and I'd like to thank everyone for being good stewards of government funds. Between June and Oct with six PCS examiners and two auditors, PPC processed 10,834 manual PCS claims, a big achievement for such a small number of personnel. As an AO, you are the front line to make sure PPC is able to process these claims without having to return or place travelers in debt because they were miss counseled. AO's have a broad authority to determine when travel is necessary to accomplish the unit's mission, authorize travel, obligate unit travel funds, approve trip arrangements and authorize travel expenses incurred ICW that mission and IAW the JFTR, FTR, and agency policy. It's a big job that requires a lot of knowledge for a collateral. A couple of new/updated items are below that I think are very important and should be shared with your crew.

TDY/PURCHASE OF ANY DWELLING:
Effective 1 January 2012 for uniform members with an order issued on/after 1 January 2012, mortgage interest and property taxes associated with the purchase of any dwelling (to include a recreational vehicle) purchased at a TDY location may not be claimed as substantiation for payment of per diem while TDY. Example: Order issued 29 December 2011 and dwelling purchased 2 January 2012 no lodging payments for purchase costs. Personnel who were issued orders before 1 January 2012 and had already purchased a dwelling at the TDY location before 1 January 2012 may continue to claim lodging costs related to the purchased dwelling until the expiration of the current TDY order including any extensions to that order limited to the following:

> For those eligible (see above), allowable expenses are prorated based on the number of days in the month, rather than by the actual number of days the member occupied the residence (57 Comp. Gen. 147 (1977)), and include the monthly: Mortgage interest; Property tax; and Utility costs actually incurred (does not include any installation and hook up charges), e.g., electricity, natural gas, water, fuel oil, sewer charges, not to include entertainment utilities (e.g. cable, TV, telephone). A member who purchased and occupied a residence at the TDY location may not be reimbursed for any cost associated with rental, purchase or shipment of furniture. Civilian Federal Employees - IAW FTR 301-11.12(b) dated 14 October 2011, reimbursement under this paragraph is not allowed.

RECORD KEEPING:
The following information is being added to the next update to the Personnel and Pay Procedures Manual on record keeping. Along with the traveler keeping record of their travel documents for six years three months, the unit controlling the authorization of travel must maintain copies of records relating to reimbursing individuals, such as travel orders, per diem vouchers, and all supporting documents relating to official travel. These official travel records shall be maintained for a period of six years.

TRANSPORTATION:
It is mandatory policy that all travelers use the designated Travel Management Center, contractor SATO for all official transportation requirements. For invitational travelers and travelers who do not possess a government travel credit card, the unit AO shall assist the traveler in making their transportation reservations. Travelers should be authorized to use the Centrally-Billed Account (CBA) for transportation expenses if the traveler does not possess a GTCC. The order must specify that use of the CBA is authorized. The CBA can be used in the purchase of commercial transpiration tickets for individuals who possess an individually billed GTCC but only when the duration of the TDY trip exceeds 21 days or PCS delay exceeds 15 days. The CBA shall be used to purchase of Alaska marine highway system (AMHS) ferry reservations that are in conjunction with a PCS. Official travel that requires advance purchase or overseas transportation tickets that exceed $3,000 dollars are authorized to be charged to the CBA even by travelers who hold an individually billed travel charge card. The advanced purchase/ticketing is defined as more than three business days prior to departure.

When leisure travel is being arranged in conjunction with official travel neither the CBA nor the travelers individually billed account GTCC shall be used for travel segments which include leisure travel. As applicable, the CBA or the travelers individually billed account GTCC may only be used for travel between official duty locations that does not include an leisure travel and which is ticketed separately

(Continued on page 29)

(Continued from page 28)
from the leisure travel segments. Special rules and fare restrictions apply to leisure in conjunction with official travel. Travelers are encouraged to contact their Servicing Personnel Office (SPO) prior to booking any leisure travel.

Reimbursement for official travel transportation made outside the contracted TMC is limited to the City-pair YCA contracted fares. The toll free SATO Service Center phone numbers are; Hawaii, Guam, Singapore, and Japan - 1-877-666-1304, all others - 1-800-753-7286.

GENERAL:
Hotel Reservations: When making lodging reservations, travelers shall use the Travel Management Center or reserve a room directly with the hotel/chain (including the hotel's online website). Third party lodging reimbursement is authorized for hotel lodging obtained through an online booking agent only when the traveler can provide a documented itemized receipt with proof of payment for room costs from the hotel or online booking agent showing the following charges: Daily hotel room costs; Daily hotel taxes; and Daily miscellaneous fees, if applicable.

Federal government travelers while on official travel may book there lodging through GSA FedRooms at: https://www.fedrooms.com/. FedRooms leverages the government buying power to offer safe, economical and compliant hotel lodging at per diem or better rates at hotels globally.

Blanket Travel Orders must meet the following requirements:

Be an order for an individual; Define the time period covered by inclusive dates; Inclusive dates do not cross fiscal years (30 Sep/01 Oct); Define the geographic area in which travel can be performed; The reason(s) making the blanket/ repeat TDY order necessary; Excess accompanied baggage authorization, if necessary; and other conditions, limitations, and instructions appropriate such as the use of GOV'T QTRS/dining facility/mess is required if available to the member.

For geographic area(s) the Blanket Travel Orders must list the following:

> Unlimited Open. Allows the traveler to travel anywhere on official business without further authorization for a specified period of time within a fiscal year.
>
> Limited Open. Allows the traveler to travel on official business without further authorization under certain specific conditions, i.e., travel to specific geographic area(s) for a specific purpose(s), subject to trip cost ceilings, or for specific periods of time within a fiscal year.
>
> Repeat. Allows the traveler to travel on official business without further authorization to a specific destination for a specified period of time within a fiscal year.

The following types of travel must be authorized on a trip-by-trip basis: Other than economy/coach-class transportation; Conference travel; Foreign travel; Travel funded from a non-federal source Training-related travel; and, Travel by volunteers and invitational travel.

> Note: Generic actual expenses allowance is not authorized on blanket orders. If necessary, an amendment to the order must be completed.

TQC Orders:
Orders issued by the Training Quota Management Center (TQC) may be amended by the unit AO to reflect alternate means of travel to and from TDY location. Cost of alternate travel cannot exceed the constructed cost of the GTR (worksheet to construct travel: http://www.uscg.mil/ppc/travel/ConstructiveGTRCost.XLS). Unit AOs may also authorize and amend orders to cover remain overnights (RON). Unit authorization of RON is limited to delay in travel due to weather, missed connections due to late arrival of a flight, and to accommodate travel IAW JFTR U3006. RONs are not authorized for personal convenience. IAW JFTR U3015-C and APP G, the AO may authorize/ approved excess accompanied baggage.

Rental vehicles and change in course dates must be approved by TQC. To request an amendment, contact the POC for the related course at http://www.uscg.mil/hq/tqc/TQC_phone_list.asp. If approved, TQC will reply with an e-mail amendment that must be printed/signed by the unit AO and placed with the original orders.

AUDITS:
If further documentation is needed to process an audit (audit is kicked back as unable to process), please fax the required documentation to 'Kickback' at 785-339-3777 referencing the name, TONO and claim number on the fax cover sheet.

CWO3 JAY BENBOW
TRAVEL BRANCH CHIEF
COAST GUARD PAY & PERSONNEL CENTER

SPO Pending Pay and Separations Transactions Query

Introduction

This section provides the procedure for running the SPO Pending Pay and Separations Transactions Query.

Usage

SPO supervisors should run this query prior to each payroll processing cutoff date to identify transactions in a pending status. Pending transactions will not transmit to JUMPS for payroll processing.

Description

The SPO Pending Pay and Separations Transactions Query returns the following data elements.

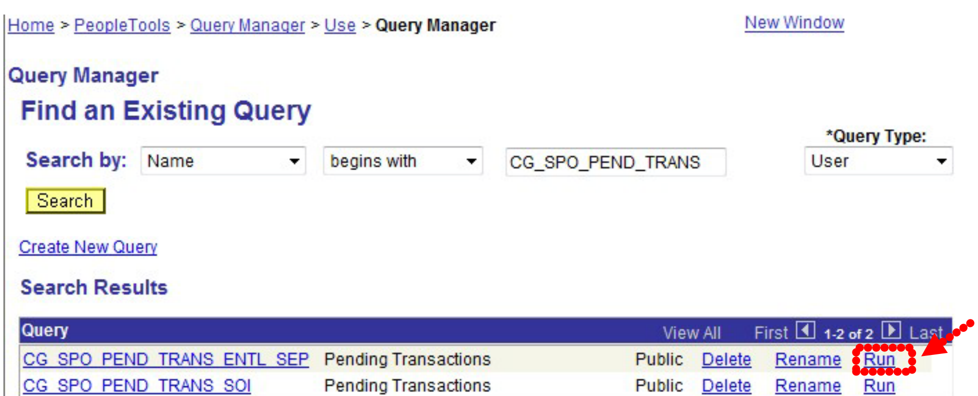
Field/Column	Description
ID	Employee ID of the member
Name	Name of the member (Last, First, MI)
DeptID	Member's assigned department ID
Descr	Department ID Description/Unit Name
Sal Plan	Member's Salary Plan (e.g. ENL-Enlisted, OFF-Officer, WAR-Warrant Officer)
Grade	Member's Pay Grade (e.g. E5, O1, W4)
Eff Date	Effective Date of the transaction (MM/DD/YYYY)
Earn Code	Entitlement Earnings Code (e.g. ADP-Advance Pay, BA1-BAH, ICC-INCNOUS COLA). Note: The "SEP" Earnings Code represents a separation transaction.
Descr	Entitlement Earnings Code description (e.g. Advance Pay, Aviation Career Incentive Pay, Subsistence). Note: The "Separation Pay" description represents a separation transaction. The description is used for all separation transactions with or without entitlement to separation pay.
Origin	Operator ID of the person who entered the transaction.
Description	Name of the person who entered the transaction (Last, First, MI)

Continued on next page

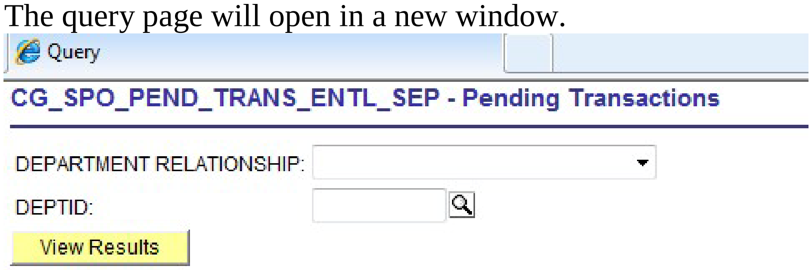
SPO Pending Pay and Separations Transactions Query,
Continued

Procedure Start Internet Explorer, sign into MyPortalDirect and follow these steps to run the SPO Pending Pay and Separations Transactions Query.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
Enterprise Main/Menu > Direct Access Content. The Direct Access (PeopleSoft 8.0) menu will open in a new window, open the query manger by clicking on the following menu items:
People Tools > Query Manager > Use > Query Manager</td></tr>
<tr><td>2</td><td>The Query Manager page will display. Click in the blank field to the right of "begins with" and enter all or part of the query title "CG_SPO_PEND_TRANS" "and then click the search button.



</td></tr>
<tr><td>3</td><td>Click the Run link for the CG_SPO_PEND_TRANS_ENT_SEP query.</td></tr>
<tr><td>4</td><td>The query page will open in a new window.

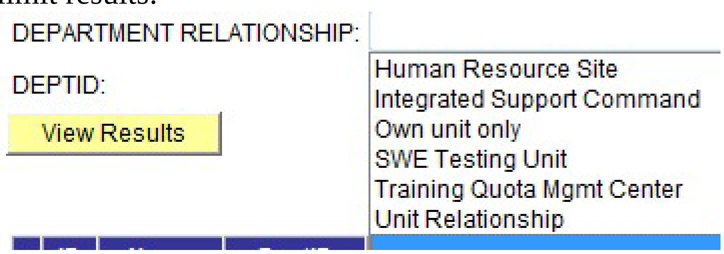


Enter the search criteria as described in the following steps.</td></tr>
</table>

Continued on next page

SPO Pending Pay and Separations Transactions Query,
Continued

Procedure **(continued)**

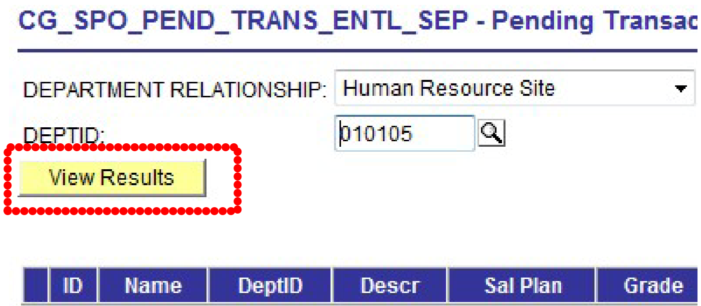
Step	Action
5	Click the drop-down arrow in the **Department Relationship** field and select the ***Human Resource Site*** relationship type. This relationship will return results for all units in the HRS/SPO's AOR. The following relationship types may also be used to limit results:  • **Integrated Support Command** -- Will return results for all units in the Base's/PSSU's AOR. • **Own Unit Only** -- Will return results for the department ID number entered. • **Unit Relationship** -- If a unit relationship has been setup, will return results for the unit ID entered and related units. **Note**: Relationship Types are administered through the following menu: Home > Develop Workforce > Plan Successions (GBL) > Setup > **Dept Relationships** If the "Own Unit Only" relationship type does not provide any results, use the Dept Relationships maintenance menu and setup the Own Unit Only relationship. This is not established in the system for all units. It has to be setup at least once. The *SWE Testing Unit* and *Training Quota Mgmt Center* relationship types are not applicable to this query and should not be used.
6	Enter the Department ID number in the **DEPTID** field. Use the lookup icon to search for the ID if necessary.

Continued on next page

SPO Pending Pay and Separations Transactions Query,

Continued

Procedure **(continued)**

Step	Action
7	Click the **View Results** button. 
8	The query will run and the results will be shown in the lower portion of the window. Review each pending transaction. • Ensure separation transactions have been prepared in accordance with the guidance in CG SPO Manual, PPCINST M5231.3 (series), Part VI, Separations, Chapter 2, Statement of Intent. Separation transactions may be approved up to 14 days prior to the departure date (for RELADs and Retirements) or 14 days prior to the effective date (for Discharges). • Ensure pay entitlement transactions have been prepared in accordance with the guidance in CG SPO Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements. • Delete all unneeded pending transactions.
9	The query results will display. Use the Download results in: Excel2K Spreadsheet or CSV Text File links to save a copy of the query to your local system.

SPO Pending Statement of Intent (SOI) Transactions Query

Introduction

This section provides the procedure for running the SPO Pending Statement of Intent (SOI) Transactions Query.

Usage

SPO supervisors should run this query prior to each payroll processing cutoff date to identify SOI transactions in a pending status. Pending SOI transactions will not transmit to JUMPS for payroll processing.

Description

The SPO Pending SOI Transactions Query returns the following data elements.

Field/Column	Description
ID	Employee ID of the member
Name	Name of the member (Last, First, MI)
DeptID	Member's assigned department ID
Descr	Department ID Description/Unit Name
Sal Plan	Member's Salary Plan (e.g. ENL-Enlisted, OFF-Officer, WAR-Warrant Officer)
Grade	Member's Pay Grade (e.g. E5, O1, W4)
Eff Date	Effective Date of the SOI transaction (MM/DD/YYYY)

Procedure

Start Internet Explorer, sign into MyPortalDirect and follow these steps to run the SPO Pending Pay and Separations Transactions Query.

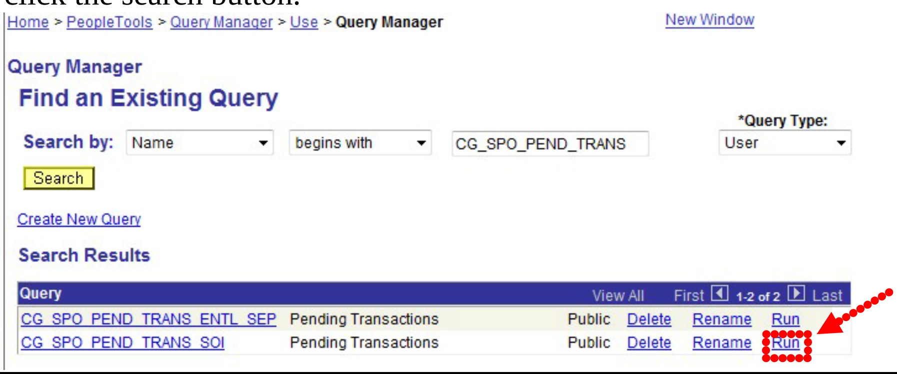
Step	Action
1	Select menu items in the following order: Enterprise Main/Menu > Direct Access Content. The Direct Access (PeopleSoft 8.0) menu will open in a new window, open the query manger by clicking on the following menu items: People Tools > Query Manager > Use > **Query Manager**

Continued on next page

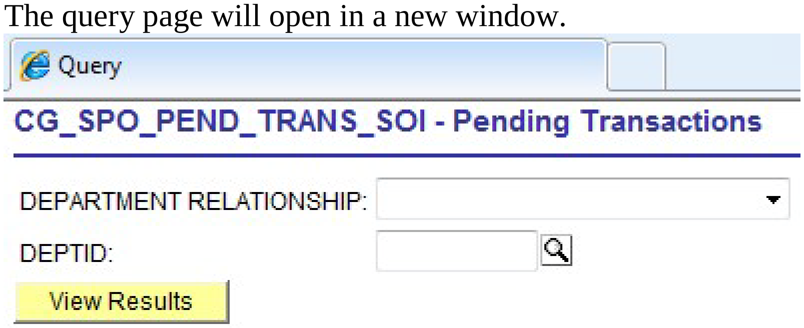
SPO Pending Statement of Intent (SOI) Transactions Query,
Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The Query Manager page will display. Click in the blank field to the right of "begins with" and enter all or part of the query title "CG_SPO_PEND_TRANS” "and then click the search button.



</td></tr>
<tr><td>3</td><td>Click the <u>Run</u> link for the CG_SPO_PEND_TRANS_SOI query.</td></tr>
<tr><td>4</td><td>The query page will open in a new window.

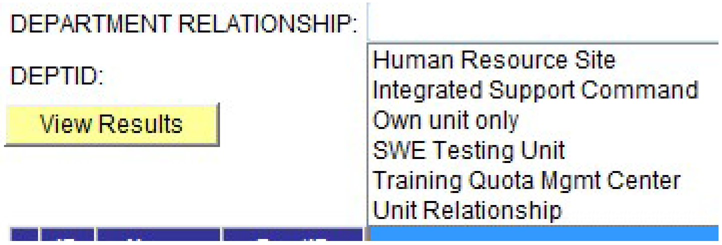


Enter the search criteria as described in the following steps.</td></tr>
</table>

Continued on next page

SPO Pending Statement of Intent (SOI) Transactions Query,
Continued

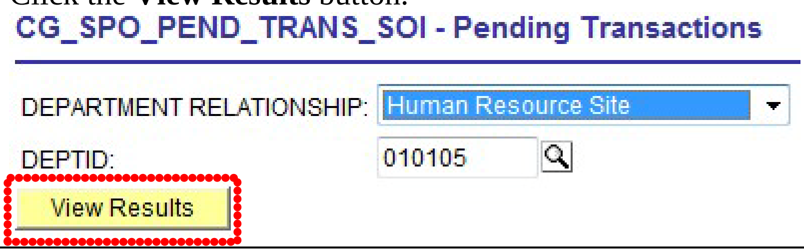
Procedure **(continued)**

Step	Action
5	Click the drop-down arrow in the **Department Relationship** field and select the ***Human Resource Site*** relationship type. This relationship will return results for all units in the HRS/SPO's AOR. The following relationship types may also be used to limit results:  • **Integrated Support Command** -- Will return results for all units in the Base's/PSSU's AOR. • **Own Unit Only** -- Will return results for the department ID number entered. • **Unit Relationship** -- If a unit relationship has been setup, will return results for the unit ID entered and related units. **Note**: Relationship Types are administered through the following menu: Home > Develop Workforce > Plan Successions (GBL) > Setup > **Dept Relationships** If the "Own Unit Only" relationship type does not provide any results, use the Dept Relationships maintenance menu and setup the Own Unit Only relationship. This is not established in the system for all units. It has to be setup at least once. The *SWE Testing Unit* and *Training Quota Mgmt Center* relationship types are not applicable to this query and should not be used.
6	Enter the Department ID number in the **DEPTID** field. Use the lookup icon to search for the ID if necessary.

Continued on next page

SPO Pending Statement of Intent (SOI) Transactions Query,
Continued

Procedure **(continued)**

Step	Action
7	Click the **View Results** button. 
8	The query will run and the results will be shown in the lower portion of the window. Review each pending SOI transaction. Ensure transactions have been prepared in accordance with the guidance in CG SPO Manual, PPCINST M5231.3 (series), Part VI, Separations, Chapter 2, Statement of Intent. • Approve all valid SOI transactions at least 45 days prior to the effective date of separation. SOI transactions may be changed (by submitting and new SOI transaction) up to the payroll processing date prior to the separation date. • Delete pending SOI transactions for: • A member in a non-pay status who is involuntarily retained (i.e., members in military confinement or in an appellate leave status). • Enlisted members being promoted to warrant officer. • Warrant Officers being promoted to Lieutenant. • Members in military confinement whose enlistment expires. • Members on appellate leave whose enlistment expires. • Members who have already separated (e. g. Separation transaction has been approved and transmitted. • Reserve Component members who are not on long-term active duty or EAD. A SOI transaction is not necessary for a member completing short-term (R990) orders or separating from an inactive duty status.

Continued on next page

SPO Pending Statement of Intent (SOI) Transactions Query,
Continued

Procedure **(continued)**

Step	Action
8	If the member's intentions or any information on the SOI transaction changes following submission, re-submission with a new effective date is required. **In addition, immediately notify PPC (SES) by urgent email correspondence if the member's intentions change within 15 days of the impending separation/retirement date.**
9	The query results will display. Use the Download results in: Excel2K Spreadsheet or CSV Text File links to save a copy of the query to your local system.