PPC SPO Manual

Part III

General Transactions

Overview

Introduction

This volume contains procedures for entering General Transactions in Direct-Access

Contents

This part contains the following chapters.

Topic	See Chapter
Competencies	1
Employee Review	2
Advancements, Change in Rating, Reduction, Add/Remove Designator	3
Dependency, Decedent Affairs, SGLI and Contact Information	4
Disciplinary Actions	5
General Absences	6
Leave and Other Approved Absences	7
Personal Data	8
Height Weight Frame Size Measurement	9
Report Death of Member	10

PPC SPO Manual

Part III – General Transactions

Chapter 1 – Manage Competencies

Overview

Introduction

Competencies is a term used to describe a person's skills, training, achievements, honors and awards. In the Coast Guard, we use the Competencies module to record information about our personnel.

In this chapter

The following topics are covered in this chapter

Topic	See Section
Honors and Awards	III-1-A
Competency Codes	III-1-B
Education and Degree Information	III-1-C
Languages	III-1-D
Licenses & Certificates	III-1-E
Memberships	III-1-F
Test Results	III-1-G
Training	III-1-H

Reports and Queries: See PPC SPO Manual, Part X (Error Feedback, Reports and Queries), Chapter 3 (Reports and Queries). The following reports and queries are available:

The following competency reports are available:

- Accomplishment (Awards, Educations, ASVAB, etc.)
- Competency/Qualifications Report
- Personnel Data Information File Report
- Training by Department Query
- Senior Enlisted Academy Course Completion Query (Shows all members in paygrade E7, E8 or E9)

You can also use these queries to find member competency information:

- Add or Update a Accomplishment Query by Department
- Add or Update a Competency Query by Department

Section A – Honors and Awards

Overview

Introduction

This section provides the procedures for viewing and updating a member's honors and awards data.

Discussion

The Person Profile is used to store data about decorations, medals, ribbons and uniform devices awarded to or earned by a military member.

Reference

Please refer to the Medals and Awards Manual, COMDTINST M1650.25(series) for policy guidance.

In this section

The following topics are covered in this section.

Topic	See Page
Honors and Awards Individual	III-1-A-3
Honors and Awards Corrections, Updates and Deletions	III-1-A-11
Honors and Awards Multiple	III-1-A-17

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Honors and Awards (Individual)

Introduction

This section provides the procedures for entering or updating a member's Honors and Awards information in the system.

Individual USCG awards are maintained in the Person Profile of Direct Access. Information about a member’s ribbons, medals and other honors is stored here. The Servicing Personnel Offices enter and maintain this information. The information is available to the member via self service.

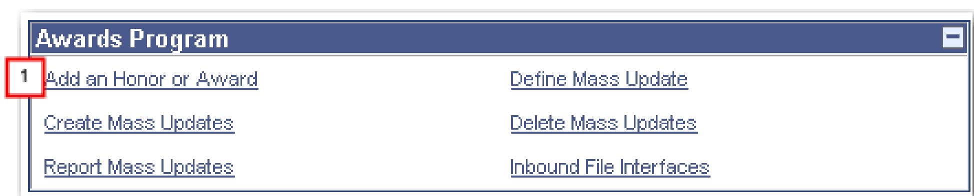
Process

Update a member's awards upon receipt of a copy of the award or completed CG-1650.

If the Honor or Award Code is not present, contact COMDT CG-1221 at (202)475-5384 to initiate the process of having it added to the database. After the new code is approved, PPC will be notified to update the award table in DA. After the update is completed you can complete the transaction.

Portal Navigation

Frequently used links for adding awards are located in the Portal pagelet for Awards. These pagelet links allow a user to quickly navigate to pages without going through a lengthy menu.



1. Add an Honor or Award: This link takes the user to the Person Profile screen. Honors and Awards are recorded on the Person Profile screen.

Continued on next page

Honors and Awards (Individual), Continued

Portal Link/ Menu Path for Viewing or Adding an Award

When you want to view a member's honors and awards or when information about a member's award is received and ready to be entered into Direct Access, navigate to the following page:

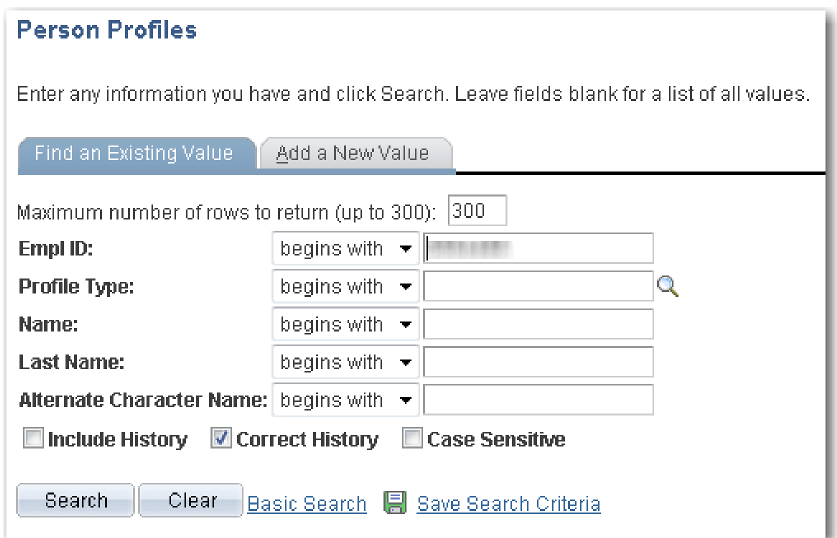
Portal Link: Add an Honor or Award

Menu path: Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

Direct Access also remembers recently used pages. If you have used the Person Profile page recently, you can go to Favorites > Recently Used > Person Profiles.

Locating the Member

Use the Search record to pull up the member's Person Profile using the member's EMPLID or name.



If the search returns more than one record, be sure to select the correct member's record that has "PERSON" in the Profile Type column.

Note: If a member has both a Person Profile and an Awards Coordinator Profile, then that member is a PHS officer who is or has been assigned to the Coast Guard for duty. Please coordinate with the member and PHS to ensure that the member's awards are properly approved and recorded.

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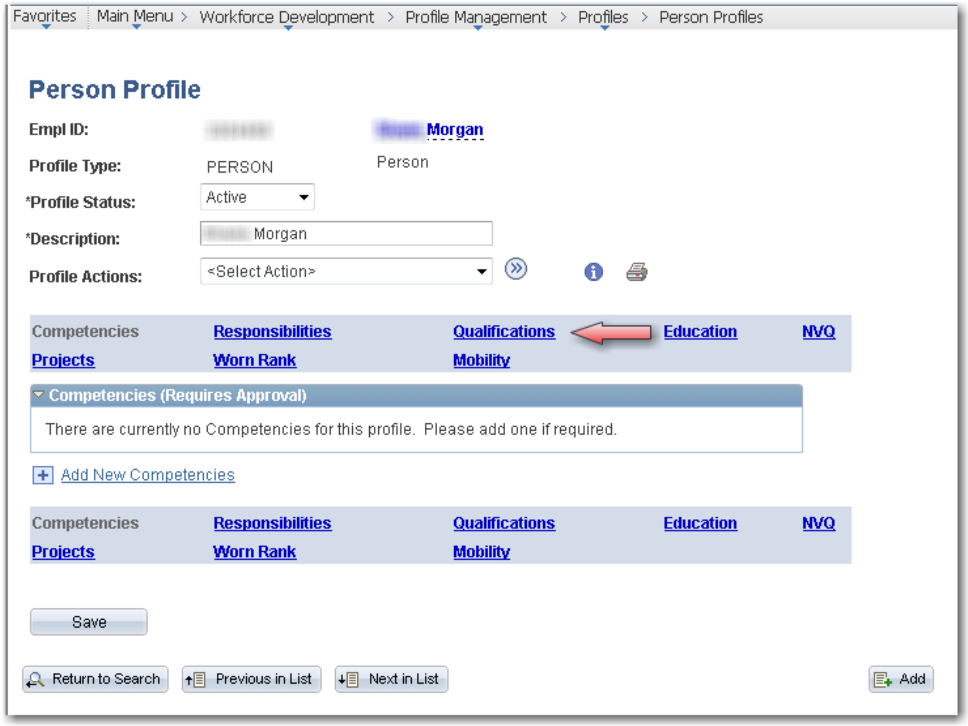
Honors and Awards (Individual), Continued

Viewing Honors and Awards

1. Select the "Qualifications" tab.



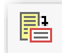
2. A list of the member's current honors and awards will display. If a member has more than five honors or awards, they won't all display unless you click "View All."

Continued on next page

Honors and Awards (Individual), Continued

Viewing Honors and Awards (Cont'd)

3. Check to see if the member already has an award of the same type. This icon indicates that there are multiple entries for the award type:



Note: Clicking this icon will access the award in "view only" mode. Always use the link in the Honar and Award column to access the award if you want to make changes.

Honors and Awards (Approval Not Required) Customize | Find | View 5 | First 1-11 of 11 Last

ID	Honor and Award	View History
CGAF	Armed Forces Service Medal	
CGGWOTS	Global War Terror Service Medl	
CGHC	CG Achievement Medal	
CGMB	CG Meritorious Unit Comm Ribbo	
CGML	CG Rifle Marksman Ribbon	
CGMM	CG Pistol Sharpshooter Ribbon	
CGMT	CG Meritorious Team Comm Ribbo	
CGNA	CG Comdt Ltr of Comm Ribbon	
CGNH	National Defense Service Medal	
CGPUC	CG Presidential Unit Citation	
CGSU	CG Port Security Insignia	

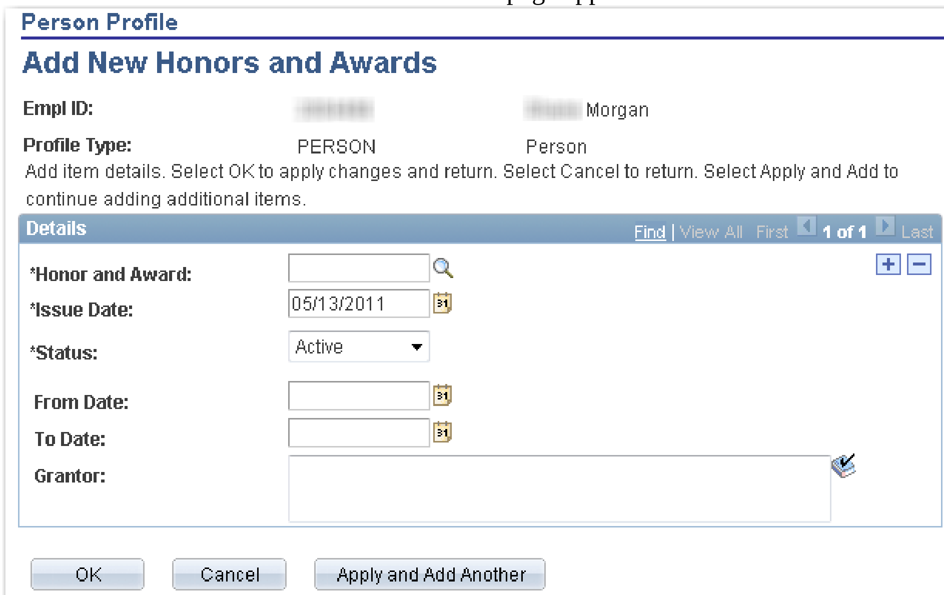
Add New Honors and Awards

Continued on next page

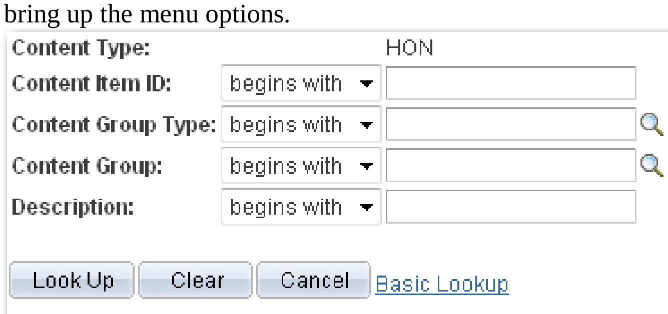
Honors and Awards (Individual), Continued

Adding a New, Unique Honor or Award

1. To add a new honor or award to the member's profile, click "+ Add New Honors and Awards." The "Add new Honors and Awards" page appears.



2. Enter the data about the award:
   a. **Honor and Award (Required):** Enter the Award Code or, if the Award Code is unknown, search for the award by clicking the magnifying glass. Users may enter part of the title of the award in the Description field and click "Look Up" and/or use Content Group Type to filter the search. The magnifying glass will bring up the menu options.



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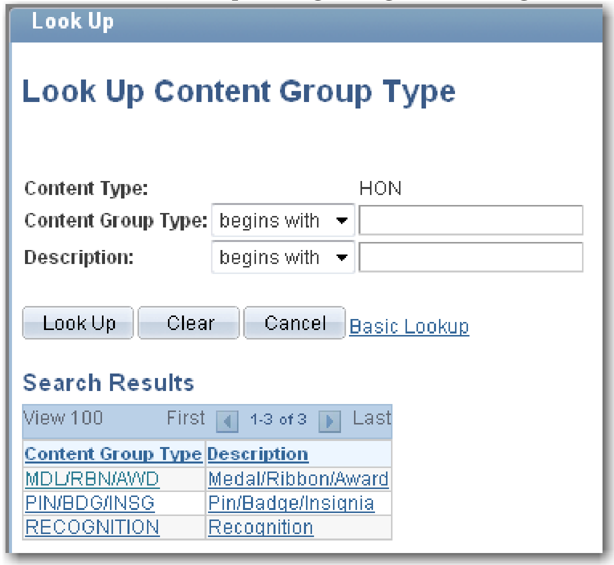
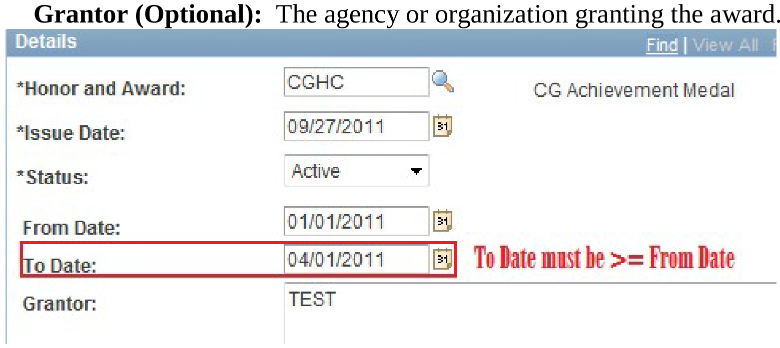
Honors and Awards (Individual), Continued

Adding a New, Unique Honor or Award (cont'd)

Content Group Type allows you to narrow your search to the class of honor, i.e., medal/ribbon/award; pin/badge/insignia; or recognition



b. **Issue Date (Required):** Enter the date the award was granted to the member.
c. **Status (Required):** This field defaults to "Active." Do NOT change this field.
d. **From Date (Optional):** If the award is for a specific period of time, enter the beginning date for that time frame. If the **From Date** is completed, the **To Date** must be completed as well.
e. **To Date (Optional):** If the award is for a specific period of time, enter the ending date for that time frame. The **To Date** must not be before the **From Date**.
f. **Grantor (Optional):** The agency or organization granting the award.



3. Click "OK" to save the record.
4. Click "Save" at the bottom of the Person Profile page to commit the changes.

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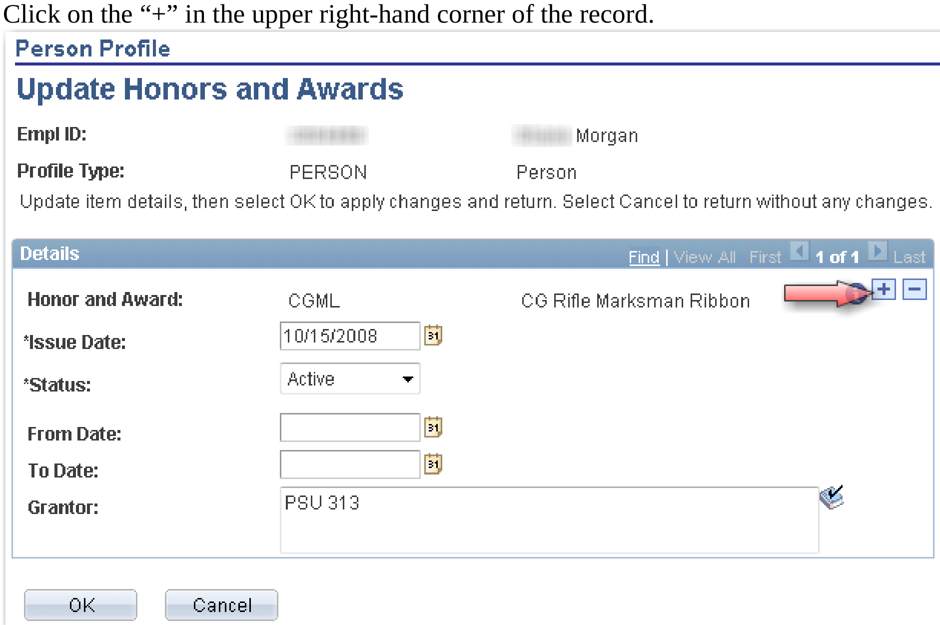
Honors and Awards (Individual), Continued

Adding an Additional Award of the Same Type

Many awards can be granted to a member multiple times. In these cases, the procedure to add the award to a member's Person Profile is slightly different. To add another instance of the same award, follow these steps:

1. To add a new award that the member has previously, click on the existing award record.

2. Click on the "+" in the upper right-hand corner of the record.



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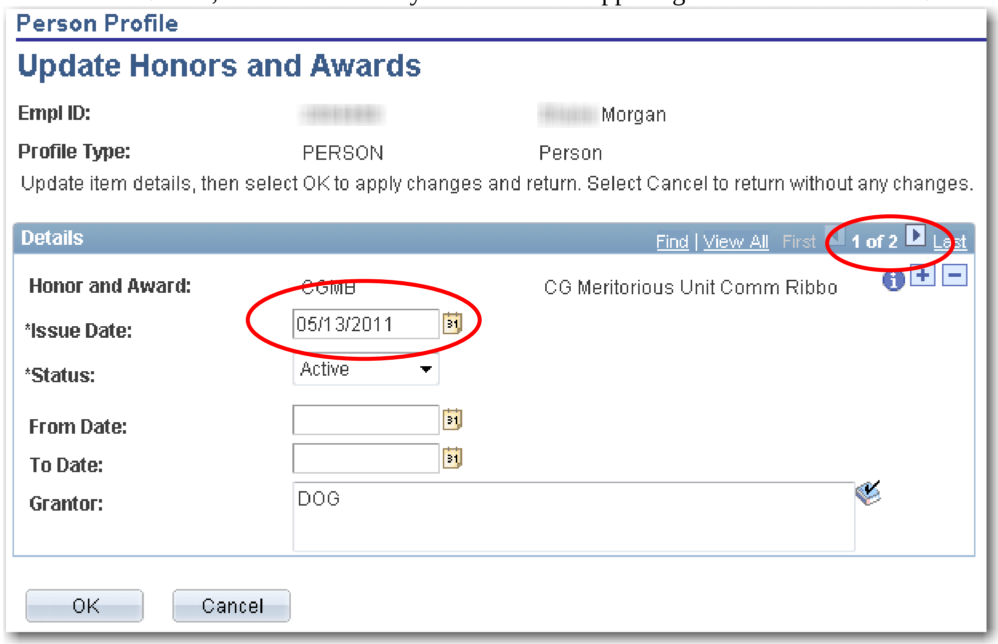
Honors and Awards (Individual), Continued

Adding an Additional Award of the Same Type (continued)

3. A new award record is created with the current date populated in the Issue Date field. Also, the record will say "1 of x" in the upper right corner of the record.



4. Enter the data in the same manner as "Adding a New, Unique Honor or Award."

5. Click "OK" to save.
6. Upon returning to the Qualifications tab, the multiple records icon will be there.

7. Click "Save" at the bottom of the Person Profile page to commit the changes.

Honors & Awards Corrections, Updates and Deletions

Introduction

This section provides the procedures for:

- Making a correction to an honor or award entry
- Making an update to an honor or award entry
- Deleting a Single Award
- Deleting One Award of Many

Making a Correction

1. From the Qualifications tab, select the award to be updated or corrected. If the member has received the award multiple times, be sure to select the correct award record.
2. Change/correct the appropriate fields.
3. Click “OK” to save.
4. Click “Save” at the bottom of the Person Profile page to commit the changes.

Making an Update

1. From the Qualifications tab, select the award to be updated or corrected. If the member has received the award multiple times, be sure to select the correct award record.
2. Add a row by clicking the “+” sign.
3. Update the appropriate field.
4. Click “OK” to save.
5. Click “Save” at the bottom of the Person Profile page to commit the changes.

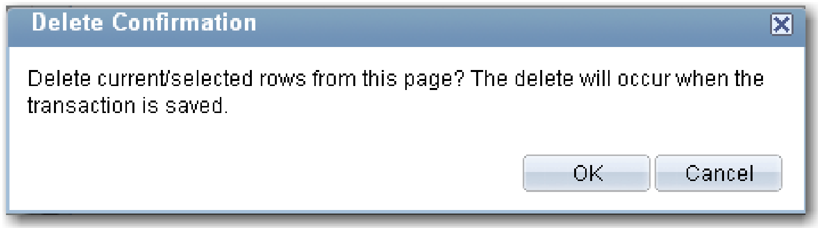
Continued on next page

Honors & Awards Corrections, Updates and Deletions,
Continued

Deleting a Single Award

1. To delete an award that a member has received only once, click the trash can on the row of that award.

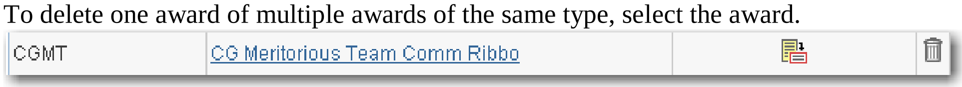
2. Click "OK" to confirm the deletion.



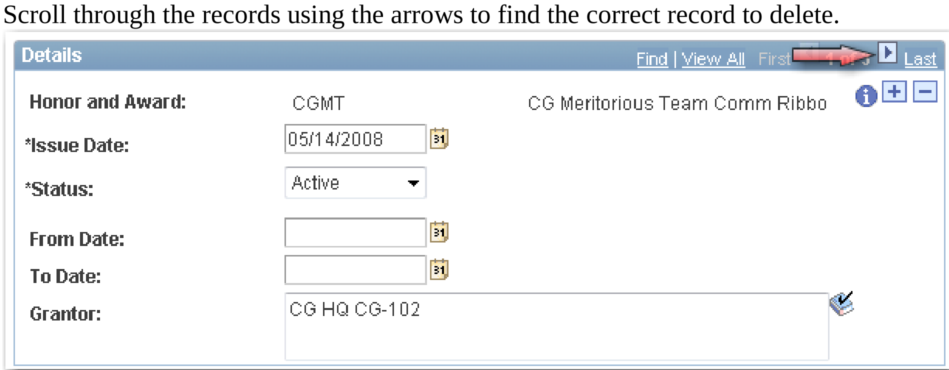
3. Click "Save" at the bottom of the Person Profile page to commit the changes.

Deleting One Award of Many

1. To delete one award of multiple awards of the same type, select the award.



2. Scroll through the records using the arrows to find the correct record to delete.



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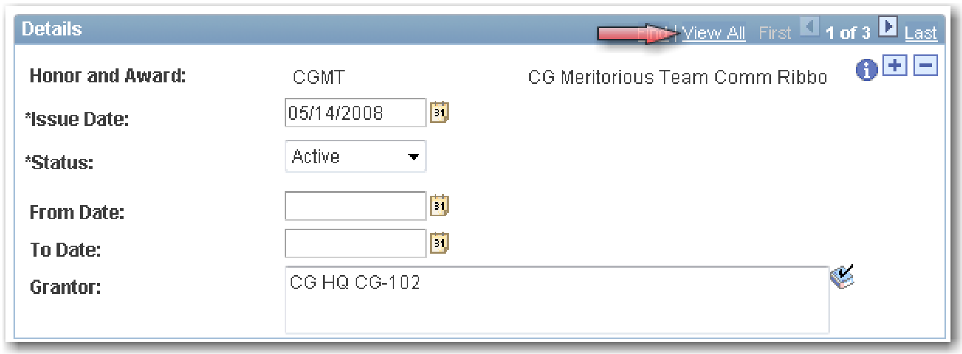
Honors & Awards Corrections, Updates and Deletions,
Continued

Deleting One Award of Many (continued)

A user can also "View All" records.



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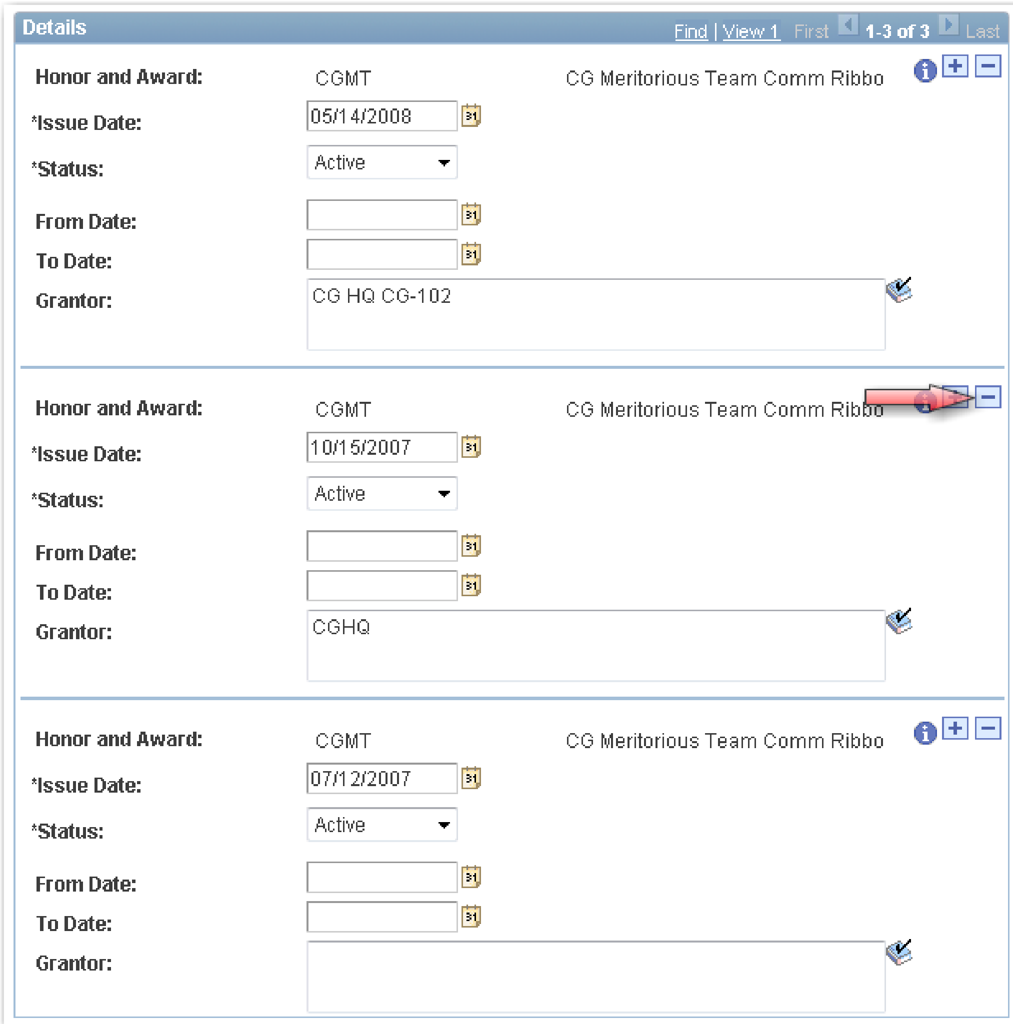
Honors & Awards Corrections, Updates and Deletions,
Continued

Deleting One Award of Many (continued)

3. Once the correct record has been located, click the "-" button in the upper right-hand corner of the record.



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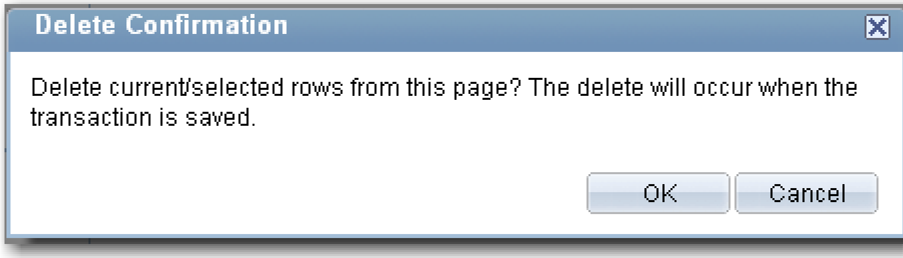
Honors & Awards Corrections, Updates and Deletions, Continued

Deleting One Award of Many (continued)

4. Click "OK" to confirm the deletion.



5.

6. Click "Save" at the bottom of the Person Profile page to commit the changes.

Deleting All Records for an Award Type

This process is the same as deleting only one instance of an award type. Each record must be deleted individually using the steps outlined in the "Deleting One Award of Many" section. To prevent unintentional deletions of awards, the trash can functionality for multiple awards of one type has been disabled.

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Honors and Awards Multiple

Update Pending.

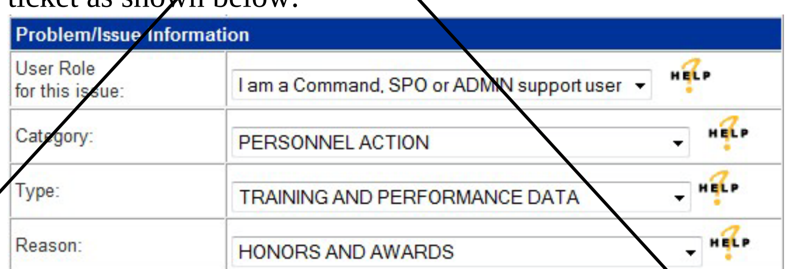
Please see E-Mail ALSPO J/11, Honors and Awards Mass Update Process, for the new procedures.

Introduction

The Hono… for some
or all men… honor or
award is i… i.e., unit
awards. T… ed in
PeopleSof… owever,
PPC has t… e same
award is i…

Procedure

This is th… ata:

Step	Action
1	Prepare a roster of personnel authorized the award. The roster shall be in Microsoft Excel (spreadsheet) file format and include, at a minimum, the employee IDs and names of personnel authorized the award. The employee IDs must appear in a single column and must be the first column in the spreadsheet.
2	Scan the award citation / authorization.
3	Transmit the roster and award citation/authorization to PPC Customer Care via trouble ticket (http://cgweb.ppc.uscg.mil/ccb/). Complete the Problem/Issue Information section of the trouble ticket as shown below:  Follow the instructions at http://cgweb.ppc.uscg.mil/ccb/attachment.asp#guide to attach the spreadsheet and award citation/authorization to the trouble ticket.
4	PPC (ID) will perform the mass update and inform the SPO when the update is completed.

Section B – Competency Codes

Overview

Introduction

This section provides the procedures for updating a member's competency codes.

In this section

The following topics are covered in this section.

Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

About Competency Codes

Update Pending

Reference

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Competency Dictionary

The Competency Dictionary, a complete listing of Coast Guard competency codes is available for download. (The links below will open an Excel spreadsheet, which you can save to your local directory. If you do choose to save the file, remember to check back here periodically for updates. The revision date is listed in the first cell of the spreadsheet.

Competency Dictionary is available at:

- http://www.uscg.mil/ppc/da/CompetencyDictionary.xls or via the CG Portal,
- https://cgportal.uscg.mil/lotus/mypoc?uri=dm:fdb6a6004098cf7885d3973b01f2374b&verb=view

Background

This section provides a brief introduction to the makeup of competency codes. The initial setup of the DA competency codes table took the original two-character PMIS/JUMPS code and added a two or three-character prefix. Competency codes are divided by type for easier location and assignment.

Type	Description	Short Description
ATON	Aids to Navigation	ATON
AVI	Aviation	Aviation
BOAT	Boat Operations	Boat Ops
C4IT	Cmd/Ctrl/Comms/Computers & IT	C4IT
CMDS	Command and Staff	Cmd&Staff
COMP	Comptrollership	Comptroller
ENGI	Engineering	Engineer
HLTH	Health Services	Health Svc
HR	Human Resources	HR
INAC	Inactive	Inactive
INTEL	Intelligence	Intel
LE	Law Enforcement	LE
LEGAL	Legal	Legal
MARSAF	Marine Safety	Marine Saf
OBC	Officer Billet Code	OBC
OPSAFL	Operations Afloat	OPS Afloat
OPSASH	Operations Ashore	OPS Ashore
WEPS	Weapons	Weapons

Do not add, edit or remove OBCs during the transition to the new Officer Specialty Codes system.

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About Competency Codes, Continued

Rating Specific Four/Five Character Codes

Normally rating specific codes can only be assigned to personnel in the specific occupational specialty. However, due to the recent establishment of new ratings and mergers of others they can be assigned to personnel that are not part of the particular rating (e.g. Some of the old TC codes are now applicable to the OS rating). The prefix is always the rating. (Examples : **BM**01 and **MST**02)

The first two or three characters (always alphabetical) are the enlisted occupational specialty (rating) the last two (numeric or alphanumeric) are the original code from the old Enlisted Quals manual and PMIS/JUMPS. So ***BM01*** decodes as Boatswain's Mate (BM) – Code 01 – Heavy Construction.

Five-Character Codes

There are two types of 5-character codes:
1. The rating specific ones (described above) where the rating is three-letters
2. The Special Series codes. Special Series. Can be assigned to anyone meeting the qualifications. Not limited to specific ratings.
The five-character codes are made up by assigning a three-letter abbreviation for the category (Aids to Navigation = ATN, Commercial Vessel Safety = CVS, etc.) and adding the original two-letter Special Series qualification code.

Category	PeopleSoft Prefix
Aids to Navigation	ATN
Command, Control, & Communication	CCC
Damage Control	DAM
Marine Environment	MAR
Commercial Vessel Safety	CVS
Miscellaneous	MIS
Operations	OPS
Personnel	PER
Mobilization Billet Codes	MOB
Underway Officer of the Deck	OOD
Boat Coxswain	CXN
Aviation	AVI

For example, these codes from the old Enlisted Quals manual:

```
Personnel
JA     Career Info Specialist(CIS) & Unit Career
       Counselor
JB     Drug and Alcohol Abuse Representative (D&A Rep)
JC     Instructor
JF     Recruiter
```

Show up like this in PeopleSoft:

```
PERJA Career information Specialist
PERJB Drug & Alcohol Abuse Represent
PERJC Instructor Knowledge
PERJF Recruiter Knowledge
```

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About Competency Codes, Continued

Officer Specialty Codes

The Future Force Office (CG-1B1) is currently working with the Office of Workforce Forecasting (CG-12A) and the Personnel Service Center (PPC) on a series of pilot programs to develop best practices before assigning Officer Specialty Codes (OSC) to officers in DA.

The pilots require officers to review their Employee Summary Sheets (ESS), a Coast Guard Business Intelligence (CGBI) tool recently detailed in ALCOAST 154/09, which summarizes Officer Competencies, Specialties, Assignment History, Education, etc. Pilot Program participants compare their ESS data with the requirements in the Officer Specialty Templates to assess the accuracy of their assigned OSC. This will lead to the development of best practices to assign and validate OSC to the remainder of the Officer Corps.

The lessons learned and recommendations from the recently completed Phase One Pilot involving the Assignment Officers (AO) in PSC-OPM-2 have been incorporated in the Business Rules for upcoming phases of the Pilot Program. Subsequent phases will include the remaining officers in PSC-OPM and RPM (3RD QTR FY09) as well as a final phase at a Sector (Late 3RD QTR FY09).

Once all Pilot Program feedback is analyzed, OSC will be assigned to the remainder of the Officer Corps and a separate ALCOAST will be released providing a detailed process for officers to validate their OSC. Officers will have the opportunity to request a review if they believe an incorrect OSC was assigned. Officers are encouraged to review their ESS per the guidance in ALCOAST 154/09 in preparation for the service-wide OSC validation initiative. We envision an annual OSC validation process conducted much like the OER Review process.

Due to the strategic intent of the Pilot Programs discussed above, ALL OFFICERS must refrain from engaging with SPO or ADMIN staffs to update legacy OBC or add new OSC data to their individual records at this time.

SEVERAL RECORDS HAVE RECENTLY BEEN ANNOTATED TO SHOW THE NEW OSC AND THOSE NOT AUTHORIZED WILL BE REMOVED BY CG-1B1. THIS IS NECESSARY TO ENSURE THE DATA INTEGRITY OF THE OSMS.

Competencies Individual

Introduc

Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Process

Update a member's Competencies upon receipt of:

- Competency Code Assignment Letter from Unit Commanding Officer
- Other form/correspondence authorizing assignment or removal of a Competency Code.

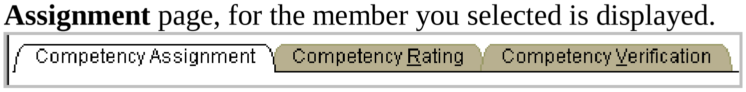
Procedure

Follow the steps below to access, enter and/or modify Competencies.

Step	Action
1	Select menu items in the following order. Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Competencies**
2	Enter the employee ID in the Emplid field or the members SSN in the Social Security Number field and check the "Correct History" box at the bottom of the page. Then, press the Search button. See Search Tips for help on locating a member. Note: When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.

Competency Assignment Page

The first page of three pages that makes up Competencies, the **Competency Assignment** page, for the member you selected is displayed.



A listing of the member's current competencies is located on the left side of this page. Using the right side of this page, you can add additional competencies by searching and selecting them, then moving them to the Assigned Competencies section using the left arrow button.

Note: The Career Planning link and Populate from Job Button should not be clicked. No functionality is attached to either of these items.

Continued on next page

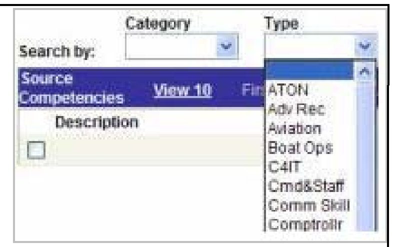
Competencies Individual, Continued

Searching for a Competency

Follow these steps to search for the competency you want to add.
See Search Tips for help on performing searches.

Step	Action
1	Click the drop-down arrow under Type in the "Search by" area. Choose a type to search. Examples of Competency types are listed below. The drop-down menu lists the Short Description.

Type	Description	Short Description
ATON	Aids to Navigation	ATON
AVI	Aviation	Aviation
BOAT	Boat Operations	Boat Ops
C4IT	Cmd/Ctrl/Comms / Computers & IT	C4IT
CMDS	Command and Staff	Cmd&Staff
COMP	Comptrollership	Comptroller
ENGI	Engineering	Engineer
HLTH	Health Services	Health Svc
HR	Human Resources	HR
INAC	Inactive	Inactive
INTEL	Intelligence	Intel
LE	Law Enforcement	LE
LEGAL	Legal	Legal
MARSAF	Marine Safety	Marine Saf
OBC	Officer Billet Code	OBC
OPSAFL	Operations Afloat	OPS Afloat
OPSASH	Operations Ashore	OPS Ashore
WEPS	Weapons	Weapons



Do not add, edit or remove OBCs during the transition to the new Officer Specialty Codes system. See "Officer Specialty Codes" in the About Competency Codes section of this chapter

Note: Refer to the Competency Dictionary to determine the type for the Competency you want to add.

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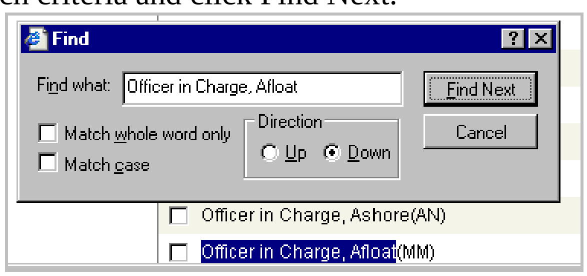
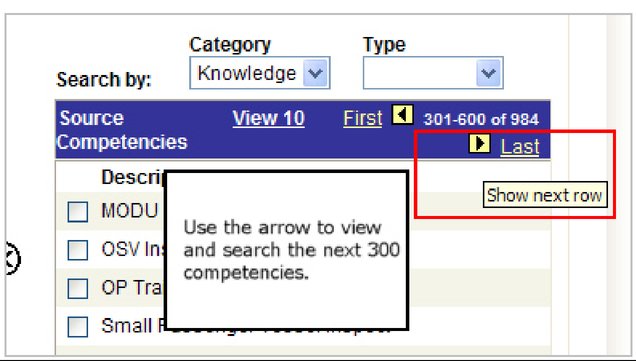
Competencies Individual, Continued

Step	Action
2	The system will display the first ten available source competencies. Click the "View xx" link to show additional (up to 300) competencies. 
3	To quickly find a particular competency on the list displayed, press Ctrl+F on the keyboard or choose Edit > Find (on This Page)... from the Internet Explorer menu bar at the top of the window.
4	The Find dialog box will box will display.
5	Provide some search criteria and click Find Next.  The search will stop at each matching text string on the page. Click the Find Next button to continue searching. Click the Cancel button when you locate the competency. Use the next row arrow to display the next 300 competencies and repeat this step until you locate the competency you want to add. 

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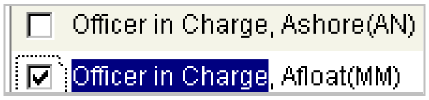
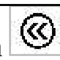
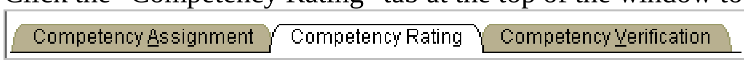
Competencies Individual, Continued

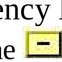
Assigning the Competency

Follow these steps to assign the competency to the member.

Step	Action
1	Click the Check Box next to the competency title to select it. 
2	Click the Add button  between the assigned and source competencies tables.
3	The selected competency will now be displayed in the member's assigned competencies.
4	After a competency is assigned it must be rated and the correct date must be entered. Click the "Competency Rating" tab at the top of the window to proceed.  Notice, the ***Proficiency** column is blank in the new competency you added in the previous procedure. See next topic for more instructions.

Deleting / Updating a Competency

The Competency Rating page is also used to delete or edit a competency.

- Use the  button to delete a competency, or
- Change the date and proficiency fields on an existing competency.

Continued on next page

Competencies Individual, Continued

Rating the Competency

Follow these steps to rate the competency. The **Interest Level** column is not used in this procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The system will default to the current date. Enter the correct effective date by deleting the current date and typing in the correct date or by clicking on icon and choosing a date.

Guidelines:
Do not enter the current date for an effective date unless the member received the competency on the same day that the record is being entered into Direct Access.
Do not use a date in the future.
<u>When correcting a members records to include competencies that are "Inactive", you must enter the date the competency was originally issued.</u> The effective date should be the date the competency was assigned to the member, e.g. the date the member’s CO certified the member as qualified to hold the competency or the date the member graduated/completed the course of instruction.
Note: You may encounter this error message when you attempt to save edits to effective date fields if you change the date of a competency using a date that precedes the competency below it.

The inserted EffDt is not within the range of effective dates in the prior and subsequent rows. (15,47) The effective date in a row must fit into the sequence of other effective dates in the same scroll. It should be before the effective date of the row above it, and after the effective date of the row below it.

If you encounter this error you will need to delete all the newer competencies and add them back in the order they were earned by the member.</td></tr>
<tr><td>2</td><td>Click on the drop-down arrow in the *Proficiency column of the new competency</td></tr>
<tr><td>3</td><td>Choose "Good" from the list of options. The other options are not used at this time.</td></tr>
<tr><td>4</td><td>Click the "Competency Verification" tab at the top of the window to proceed.</td></tr>
</table>

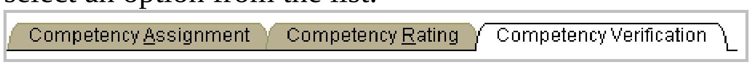
Continued on next page

Competencies Individual, Continued

Verifying the Competency

The final page in the Competency section is Competency Verification. Click on the Competency Verification tab to access the page.

Notice the Verified By column is blank for the competency you added in the previous procedure. Follow these steps to verify the competency.

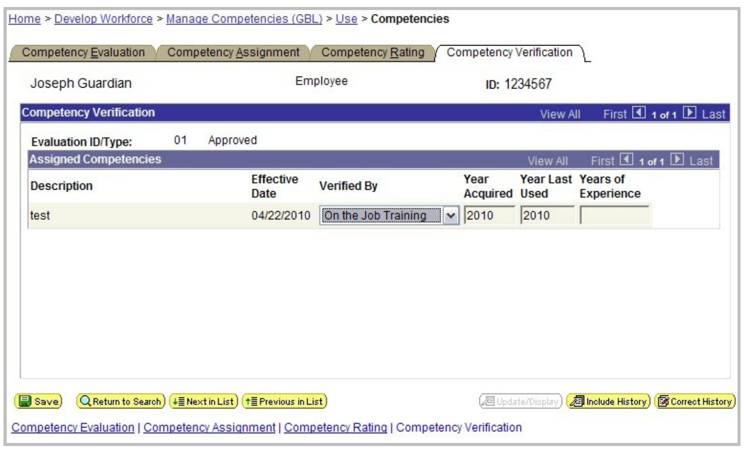
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the drop-down arrow in Verified Column in the new competency row and select an option from the list.


Refer to the table below for guidance:
<table>
<tr><th>Option</th><th>Use When...</th></tr>
<tr><td>NVQ Authority</td><td>(DO NOT USE) National Vocational Qualification recognized competency.</td></tr>
<tr><td>On The Job Training</td><td>Competency was received through OJT. This includes PQS/JQR earned Competencies. This value shall be used when a competency is documented by the completion of Personnel Qualifications Standards (PQS) or Job Qualification Requirements (JQR) or other recognized On-The-Job training program.</td></tr>
<tr><td>By Test</td><td>Competency was received by formal training, culminating in a written, oral, or practical examination. This value shall be used when a competency achieved through official Coast Guard or commercial training.</td></tr>
<tr><td>External Interface</td><td>Competency was assigned automatically from another application (TMT). Do not use this for manual entries.</td></tr>
</table></td></tr>
<tr><td>2</td><td>The system will auto fill this field with the year from the Effective Date field. Complete the Year Acquired if different from the effective date: Enter the year corresponding to the year the competency was initially earned, this will usually be the current year.</td></tr>
<tr><td>3</td><td>Complete the Year Last Used: This field is used to capture currency. Enter the Year the Competency was last used. If this is the initial competency entry, enter the current year. If this is a review and update of member competencies, enter the last year the member used the competency or the current year if use is on-going.</td></tr>
<tr><td>4
(Optional)</td><td>Complete the Years of Experience: This field is optional. If desired enter the cumulative years of experience using/demonstrating the competency.</td></tr>
</table>

Continued on next page

Competencies Individual, Continued

Verifying the Competency (con't)

Step	Action
5	Carefully review the data you have entered before saving this transaction. Be absolutely sure that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. Otherwise, proceed to the final step.
6	Click the  button to save your work. Example of a completed Competency Verification Tab: 

Competencies Multiple

Introduction

Competencies Multiple allows the user to update more than one member's competency data when more than one member assigned to the same sub-department receives the same competency on the same date. However, the

Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Correctio and Deleti

Process

Update a member's Competencies upon receipt of:

- Competency Code Assignment Letter from Unit Commanding Officer
- Other form/correspondence authorizing assignment or removal of a Competency Code.

Before you begin

Refer to the Competency Dictionary to locate the code for the Competency you want to add.

Menu Path

Select menu items in the following order.
Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Competencies Multiple**

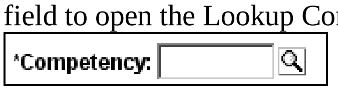
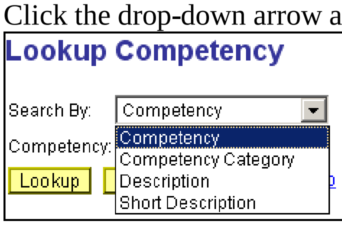
The Competencies Multiple Page will display. There are two sections on this page to complete. The **Competency to Administer** section and the **Selection Criteria.**

Continued on next page

Competencies Multiple, Continued

Completing the Competency to Administer Section

Follow these steps to complete the Competency to Administer section.

Step	Action
1	If you know the competency code, enter it and skip to Step 5 below.  If you do not know the competency code click on the icon next to the ***Competency** field to open the Lookup Competency page. 
2	Click the drop-down arrow and choose a category to search by.  • Use the Competency category if you know at least part of the code you are looking for (the old PMIS code for example). • Use the Description category if you know the title of the code.

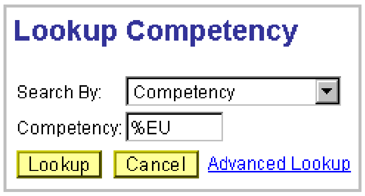
Continued on next page

Competencies Multiple, Continued

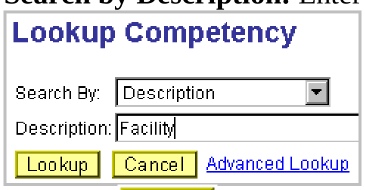
Completing the Competency to Administer Section (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

Search by Competency: Enter the % character followed by the two-character PMIS Qualification Code in Competency field. See Search Tips for more info on wildcard searches.

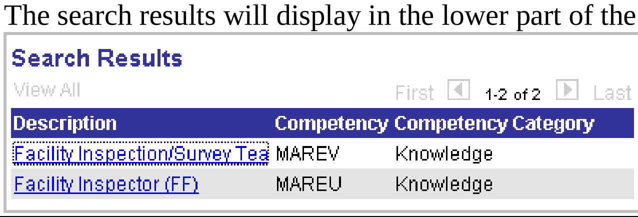


Search by Description: Enter all or part of the competency title in the Description field.



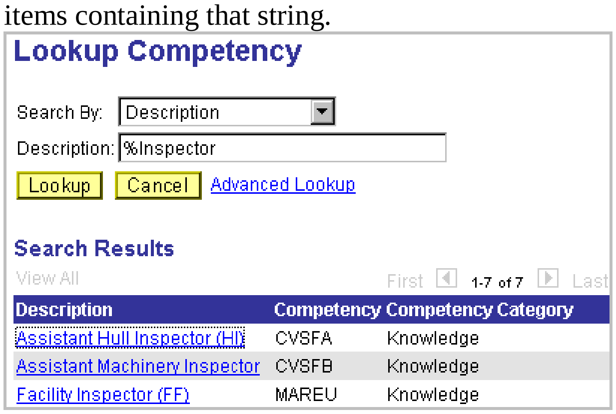
Click the Lookup button.

The search results will display in the lower part of the window.



</td></tr>
<tr><td>4</td><td>

If the code you are looking for is displayed, click on the description link to go back to the Competencies Multiple page. Otherwise, try your search again using different categories and criteria. Using the **%** character at the beginning of your search string will show all items containing that string.



If the code you are looking for is displayed, click on the description link to go back to the Competencies Multiple page.

</td></tr>
</table>

Continued on next page

Competencies Multiple, Continued

Completing the Competency to Administer Section (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Complete the Effective Date field. The field defaults to the current date, you must change it by deleting the date and entering the correct date or by clicking on the icon and choosing a date.

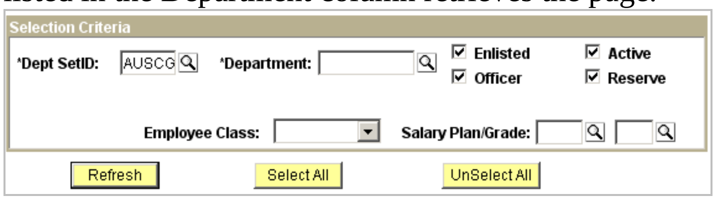
Note: The effective date should be the date the competency was assigned to the member, e.g. the date the member's CO certified the member as qualified to hold the competency or the date the member graduated/completed the course of instruction.</td></tr>
<tr><td>6</td><td>Complete the Verified By field. Click on the drop-down arrow and choose one of the following:
<table>
<tr><td>Option</td><td>Use When...</td></tr>
<tr><td>On The Job Training</td><td>Competency was received through OJT. This includes PQS/JQR earned Competencies. This value shall be used when a competency is documented by the completion of Personnel Qualifications Standards (PQS) or Job Qualification Requirements (JQR) or other recognized On-The-Job training program.</td></tr>
<tr><td>By Test</td><td>Competency was received by formal training, culminating in a written, oral, or practical examination. This value shall be used when a competency achieved through official Coast Guard or commercial training.</td></tr>
<tr><td>External Interface</td><td>Competency was assigned automatically from another application (TMT). Do not use this for manual entries.</td></tr>
</table></td></tr>
<tr><td>7</td><td>Complete the Proficiency field. Enter a value of "3" and choose Good by clicking on the and completing the Lookup Proficiency search. Good/3 is the only value used at this time.</td></tr>
</table>

Continued on next page

Competencies Multiple, Continued

Completing the Selection Criteria Section

The Selection Criteria section allows you to pick the department number and personnel to assign the competency to, by following the steps below.

Step	Action
1	Enter the sub department number in Department field. If you do not know the department ID number, click the icon of the blank row to display the Lookup Department search page. Enter partial search criteria. Click **Lookup** to display possible matches. From the Search Results list, you can choose a specific row of data. A single click on any item listed in the Department column retrieves the page.  ***Note:*** If the department you choose has sub departments, you will have to repeat this procedure for each sub department.
2	Select the status of personnel you would like to include by checking the boxes next to Enlisted, Active, Officer and Reserve as appropriate. Default is set to check all four-check boxes. Click the **Refresh** button to display a listing of personnel. If all four-check boxes are selected, all persons assigned to the department are returned in the search, including civilian personnel. • To obtain only a listing of active duty officers and enlisted members, keep the four check boxes selected. Using the drop down list box, select an **Employee Class** of **Regular**, and click on the **Refresh** button. • The four check boxes (Enlisted, Officer, Active, and Reserve) can be unchecked to modify the selection of members within a Department that will be displayed and therefore selected to receive the Training. For example, if you wanted only active duty enlisted, select only the Enlisted and Active check boxes. However, once one of the four check boxes is checked off, the Employee Class and Sal Plan / Grade cannot be used. • This search can be drilled down through the selection of a specific Employee Class and/or Sal Plan/ Grade. For example, if a listing of only SELRES members was desired, the four check boxes would remain checked, using the drop down list box select an **Employee Class** of **SELRES** and after pressing the **REFRESH** button, a listing of only SELRES members would be displayed. • Salary Plan must be completed in order to use Salary Grade. • Normally the first 5 members will be displayed. If you want the names of all members displayed, click on View 5 and it will change to **View All**. • To search for a particular member, select **FIND** and enter the member's name in the explorer user prompt.

Continued on next page

Competencies Multiple, Continued

Completing the Selection Criteria Section (con’t)

Step	Action
3	After the selection criteria are selected, press the **Refresh** button to fill the member list with the results of the search. Any time the selection criteria are changed, the refresh button should be pressed.
4	Press the **Select All** button to have all the members in the results section selected to receive the award. The **Unselect All** button will reverse this action. Check the box next to individual names to select only those members to receive the competency.
5	Carefully review the data you have entered before saving this transaction. Be absolutely sure that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. Otherwise, proceed to the final step.
6	Click  at the bottom of the page to commit the selected members’ competency information to the database. If the save completes satisfactorily, the list of members will be erased. If the save was unsuccessful, error messages will appear and the selection results will remain displayed.

Correcting, Updating or Deleting Competencies

Introduction This section provides the procedures for corrections, updates and deletions to

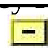
Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Proced

The Competency Rating page is used to delete or edit a competency.

- Use the  button to delete a competency, or
- Change the date and proficiency fields on an existing competency.

Section C – Education and Degree Information

Overview

Update Pending

Please see E-Mail ALSPO B/12, [Direct Access Technology Refresh - Person Profile](), for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Introd

el

Reference

Refer to the following directives for additional information about recording degree and education information.

(a) Performance, Training and Education Manual, COMDTINST M1500.10(series)
(b) Personnel and Pay Procedures Manual (4-C-2), PPCINST M1000.2(series)

Process

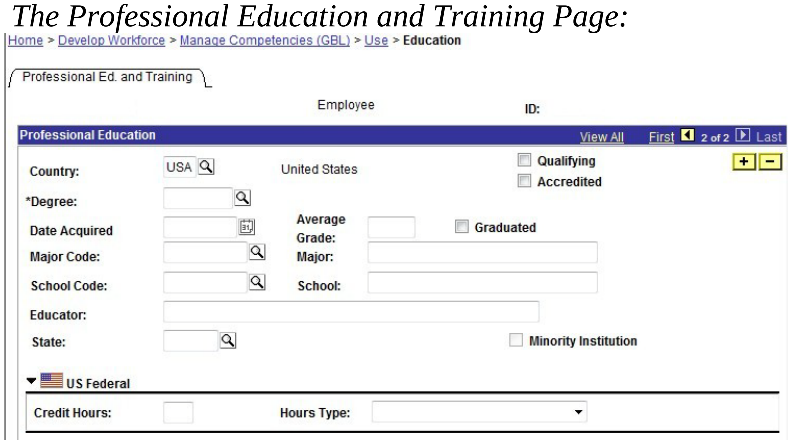
When a member completes a course of study (degree, GED, etc.), the member provides documentation (transcript, certificate, etc.) to the unit administration officer/Education Services Officer. If the unit is administratively capable they enter the data in PeopleSoft otherwise, a copy is forwarded to the SPO/HRS for input into Direct Access. If the Degree Code is not present, contact PPC Customer Care to initiate the process of having it added to the database. After the new code is added, you can then complete the transaction.

In this section

The following topics are covered in this section.

Topic	See Page
Adding Education/Degree Information	III-1-C-2
Correcting or Deleting Education/Degree Information	III-1-C-5

The Professional Education and Training Page:



Adding Education/Degree Information

Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Introduction

Confusion between education level at time of accession and current education level

degree or education level, even after the SPO has updated the information following the procedure in this section. This is because the Personal Data component (Self-Service > Employee > View > **Personal Information**) displays the member's Highest Education Level, *at time of accession into the Coast Guard*, not the current education level as displayed in the Manage Competencies, Education component. Member's may view their current education accomplishments using the CG Member Information component (Self-Service > Employee > View > **Member Info Additional**). Education accomplishments are displayed on the Education History tab (the most recent entry will be at the bottom of the list, click the "View All" link to display).

Procedure

Follow the steps below to access, enter and/or modify Education/Degree.

Step	Action
1	Select menu items in the following order. Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Education**
2	Enter the employee ID in the EmplID field or the member's SSN in the National ID field and press the **Search** button. If you do not know the EmplID or SSN provide some search criteria, such as the member's last name and department number in the appropriate fields and perform a search. See Search Tips for help using the employee lookup. Note: When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.

Continued on next page

Adding Education/Degree Information, Continued

Procedure (cont'd)

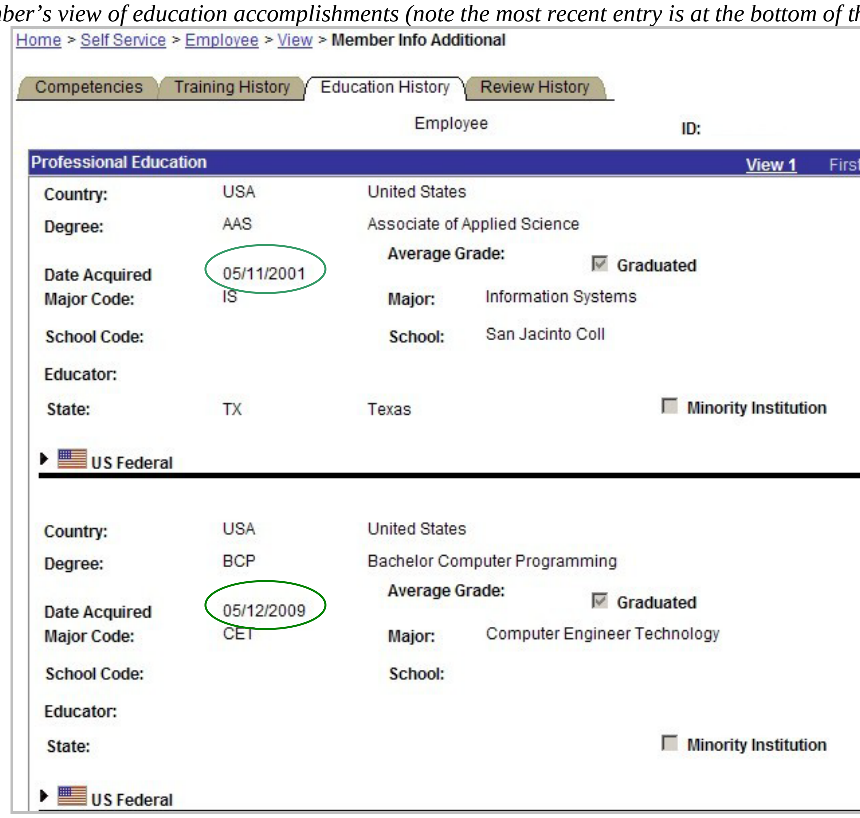
Step	Action
3	The Education page will display. Click on the **Professional Ed. and Training** tab to record/update degree(s). The Professional Ed. and Training tab will display. If you are entering the data as part of an accession, the page will open with a blank row displayed. You may enter data in this row. If you are entering additional degrees or viewing existing results the page will display the row of data. You can view the remaining rows by clicking on the links at the top of the table. 
4	If a blank row is not displayed, click to insert an additional row.

Field	Description / Instructions
Country	Defaults to USA. To change, click on and enter search criteria in the Lookup Country search dialog box. Valid values are pre-defined in the Table.
*Degree (completion of this field in required)	Enter the Degree and Major (Example: **MEE** for Masters in Electrical Engineering) or select it from a listing that will be displayed by clicking on and performing a Lookup in the Degree Table search dialog box. From the Search Results list, you can choose a specific row of data. A single click on any column in that row will take you back to the Education page with the Degree Field filled in.
Date Acquired	Enter the date the degree was acquired.
Average Grade	Enter the Grade Point Average (optional).
Graduated	Click this checkbox on to show the employee has graduated.
Major Code	Enter a Major Code or select it from a listing that will be displayed by clicking on and entering search criteria in the Major Code search dialog box. Valid values are pre-defined in the Table.
Major	Display only. If Major Code is entered will display Major.
School Code	Not Used / Leave Blank
School	Not Used / Leave Blank
Educator	Not Used / Leave Blank
State	Not Used / Leave Blank
Minority	Not Used / Leave Blank
Qualifying	Not Used / Leave Blank
Accredited	Not Used / Leave Blank
Credit Hours	Not Used / Leave Blank
Hours Type	Not Used / Leave Blank

Continued on next page

Adding Education/Degree Information, Continued

Procedure (cont'd) (continued)

Step	Action
5	Carefully review the data you have entered before saving this transaction. Be absolutely sure that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. Click Save at the bottom of the page to save your work.
6	Report completion of the data update to the member and provide the following information: "Member's may view their current education accomplishments using the CG Member Information component in Direct Access (Self-Service > Employee > View > **Member Info Additional**). Education accomplishments are displayed on the *Education History* tab (the most recent entry will be at the bottom of the list, click the "View All" link to display)." *Member's view of education accomplishments (note the most recent entry is at the bottom of the list):* 

Correcting or Deleting Degree Information

Introduction

This section provides the procedure for correcting an entry or deleting an erroneous entry.

Correcting Degree Information

Follow the procedure for Adding Education/Degree Information to access the member's record. All fields may be corrected as necessary.

Deleting Degree Information

Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Step	
1	Click
2	Click
3	Click

Section D - Languages

Overview

Update Pending

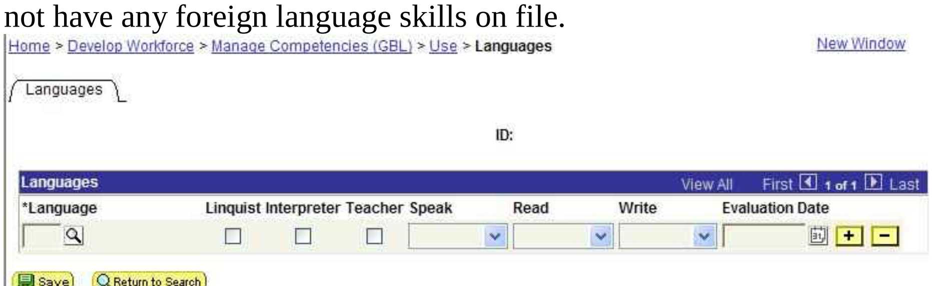
Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Introdu

Process **Do not enter Defense Language Proficiency Test (DLPT) results here**. The Educational Service Officer (ESO) with Direct Access Role CGFTESO, uses the **Foreign Language Test Results** menu item to enter DLPT test results. This will automatically update the member's Certifications and Languages, and is a prerequisite for entering entitlement to Foreign Language Proficiency Pay (FLPP).

Procedure Follow these steps to view a member's language skill.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Languages** Enter the member's employee ID number and click **Search** or press enter. ***Note:*** When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.
2	The Languages page displays. A blank row will be displayed if the member does not have any foreign language skills on file. 

Section E - Licenses & Certificates

Overview

Update Pending

Introducti

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Process

Members will forward copies of licenses and certificates to the SPO for data entry. Specific licenses and certificates to be recorded have not been defined yet. Additional guidance will be promulgated via ALCOAST, ALCGOFF, ALCGENL or email ALSPO messages. No additional Licenses & Certification codes will be created until such guidance is published.

Do not enter Defense Language Proficiency Test (DLPT) results or Foreign Language Certifications here. The Educational Service Officer (ESO) with Direct Access Role: CGFTESO, uses the **Foreign Language Test Results** menu item to enter DLPT test results. This will automatically update the member's Certifications and Languages, and is a prerequisite for entering entitlement to Foreign Language Proficiency Pay (FLPP).

In this section

The following topics are covered in this section

Topic	See Page
Adding Licenses & Certificates	III-1-E-1
Correcting and Deleting Licenses & Certificates	III-1-E-5

Adding Licenses & Certificates

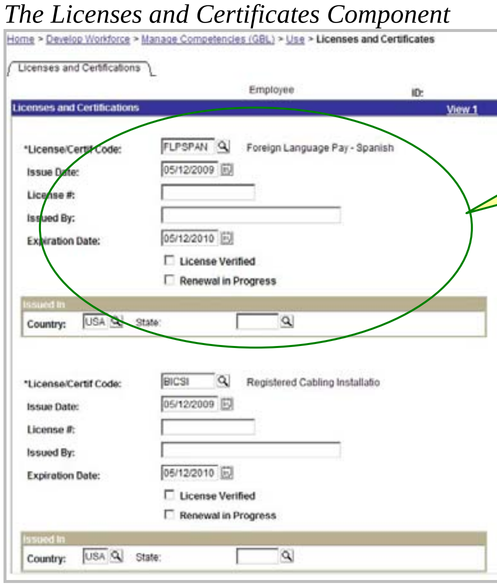
Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Introduct

Procedur

Step	
1	Select menu items in the following order: Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Licenses and Certificates.**
2	Enter the employee ID in the EmplID field and press the Search button. If you do not know the EmplID provide some search criteria, such as the member's last name and department number in the appropriate fields and perform a search. See Search Tips for help using the employee lookup. Note: When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.
3	The Licenses & Certificates page displays. A blank row will be displayed in the member does not have any licenses or certifications on file. You may enter data in this row. *The Licenses and Certificates Component*  Reminder: Foreign Language Skills are entered via the Foreign Language Test Results menu and are displayed here. Do add, edit, or delete Foreign Language data using this component.

Continued on next page

Adding Licenses & Certificates, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>If a blank row is not displayed, click to insert an additional row of language information. Complete the data fields as described below.
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>*License/ Certif Code (completion of this field is required)</td><td>Press the to access the Lookup Page. Enter search criteria and click the Lookup push button. Double click on the appropriate license or certification from the list.</td></tr>
<tr><td>Issue Date</td><td>Enter the date the License or Certification was issued. Click on the icon to choose a date.</td></tr>
<tr><td>License #</td><td>Enter the License or Certification number.</td></tr>
<tr><td>Issued By</td><td>Enter the organization that issued the License or Certification, i.e., Depart of Agriculture, USCG TRACEN Cape May, American Red Cross, etc.</td></tr>
<tr><td>Expiration Date</td><td>If applicable, enter date License or Certification expires. Click on the icon to choose a date.</td></tr>
<tr><td>License Verified</td><td>If applicable, check this box.</td></tr>
<tr><td>Renewal in Progress</td><td>If applicable, check this box.</td></tr>
<tr><td>Country</td><td>Defaults to USA. If not USA, click the to display the Lookup Country Table. Enter partial search criteria. Click Search to display possible matches. From the Search Results list, you can choose a specific row of data. A single click on any column in that row retrieves the page.</td></tr>
<tr><td>State</td><td>Enter the State abbreviation or Click the to display the lookup for the state. Enter partial search criteria. Click Search to display possible matches. From the Search Results list, you can choose a specific row of data. A single click on any column in that row retrieves the page.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Adding Licenses & Certificates, Continued

Procedure (con't)

Step	Action
5	Carefully review the data you have entered before saving this transaction. Be absolutely sure that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. Click **Save button** at the bottom of the page to save your work.

Correcting and Deleting Licenses & Certificates

Int and

Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Co ber's

Deletions Follow this procedure to delete an erroneous entry.

Step	Action
1	Click to delete an existing row of information. A warning will be displayed.
2	Click OK to delete the row or Cancel if you do not want to delete the item.
3	Click the button to save you work.

Section F - Memberships

Overview

Update Pending

Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

Introduct

Procedur

Step	Action
1	Select menu items in the following order: Enterprise Menu > Develop Workforce > Manage competencies (GBL) > Use > **Memberships**
2	Enter the employee ID number and click Search.
3	Click on the icon in the ***Organization Description** field to lookup a membership type. If the organization is not listed, the membership cannot be entered. The member may request, via the chain of command, an organization be added. The member should submit their request via memo to: PPC Customer Care, via our web form at http://www.uscg.mil/ppc/ccb The request should include a brief description of the organization's purpose and how membership benefits the Coast Guard member's career.
4	Click the **Lookup** button.
5	Enter the Membership Date.
6	Choose an organization from the search results.
7	Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.
8	Click **Save** to save your work.

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Section G - Test Results

Overview

Introduction

This section provides procedures for entering or updating a member's ASVAB, AFQT, SAT, ACT, GRE, GMAT, LSAT, and BPMC (Basic Pistol Marksmanship) scores in the system. It also provides the procedure for entering Defense Language Proficiency Test results.

In this section

The following topics are covered in this section.

Topic	See Page
Entering Test Results	III-1-G-2
Correcting and Deleting Test Results	III-1-G-6
Foreign Language Test Results	III-1-G-7

Entering Test Results

Introduction

This section provides procedures for entering or updating a member's ASVAB, AFQT, SAT, ACT, GRE, GMAT, LSAT, and BPMC (Basic Pistol Marksmanship) scores in the system. This includes both the initial capturing of the test score information as well as updates made as a result of re-testing. Test results can be entered in the system by SPOs and ESOs.

The Test Results page is also used to display a member's Coast Guard Institute correspondence course completions and Service wide Exam (SWE) raw scores.

What Test Results should not be used for

Do not enter Coast Guard Institute correspondence courses here. Correspondence course completion data is loaded into the system automatically. Manually entering correspondence course completions will result in duplicate entries.

Do not enter Defense Language Proficiency Test (DLPT) results here. Use the Foreign Language Test Results menu item to enter DLPT test results. This will automatically update the member's Certifications and Languages, and is a prerequisite for entering entitlement to Foreign Language Proficiency Pay (FLPP).

Do not change, add or remove SWE scores. The standard score is stored elsewhere in the system, changing SWE scores in the Test Results page will only change what the member sees, not the Final Multiple.

References

Refer to the following directives for additional information about recording ASVAB information.

- Personnel and Pay Procedures Manual (Chap 4), PPCINST M1000.2(series)
- Performance, Training and Education Manual, COMDTINST M1500.10(series)
- COMDT COGARD WASHINGTON DC//G-W// R 252132Z JUN 04/ALCOAST 318-04

Process

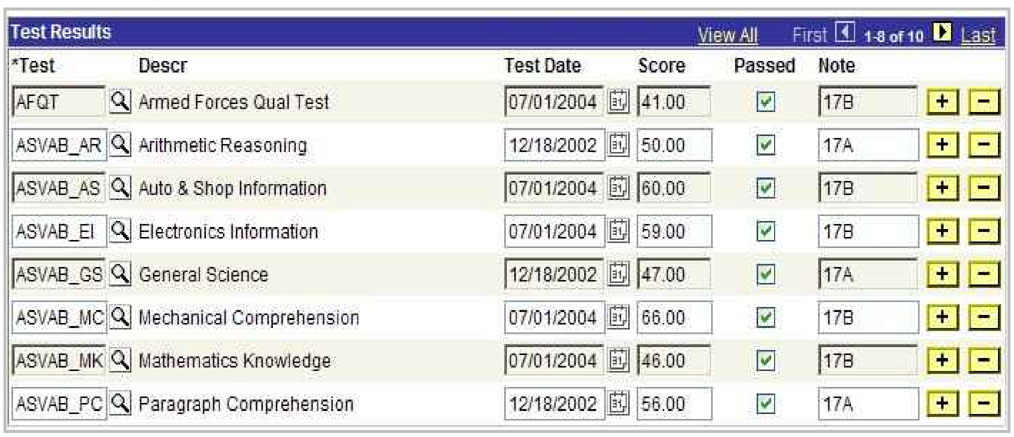
An enlisted member's test results are entered into PeopleSoft as part of the accession process. A member may retake portions of the ASVAB to improve his or her score. The unit may enter re-test results or forward them to the servicing personnel office (SPO) if the unit has limited administrative capabilities.

Continued on next page

Entering Test Results, Continued

Procedure Follow the steps below to view, enter and/or modify test results.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > Test Results</td></tr>
<tr><td>2</td><td>Enter the employee ID in the EmplID field or the member’s SSN in the National ID field and press the Search button. If you do not know the EmplID or SSN provide some search criteria, such as the member’s last name and department number in the appropriate fields and perform a search. See Search Tips for help using the employee lookup.</td></tr>
<tr><td>3</td><td>The Test Results page displays. If you are entering the data as part of an accession, the page will open with a blank row displayed. You may enter data in this row. If you are entering re-test results or viewing existing results the page will display the first eight rows of data. You can view the remaining rows by clicking on the links at the top of the table.

</td></tr>
<tr><td>4</td><td>If a blank row is not displayed, click + to insert an additional row of language information.

<table>
<tr><th colspan="7">Test Results — View All — First 1-8 of 10 Last</th></tr>
<tr><th>*Test</th><th>Descr</th><th>Test Date</th><th>Score</th><th>Passed</th><th>Note</th><th></th></tr>
<tr><td>AFQT</td><td>Armed Forces Qual Test</td><td>07/01/2004</td><td>41.00</td><td>✓</td><td>17B</td><td>+ −</td></tr>
<tr><td>ASVAB_AR</td><td>Arithmetic Reasoning</td><td>12/18/2002</td><td>50.00</td><td>✓</td><td>17A</td><td>+ −</td></tr>
<tr><td>ASVAB_AS</td><td>Auto & Shop Information</td><td>07/01/2004</td><td>60.00</td><td>✓</td><td>17B</td><td>+ −</td></tr>
<tr><td>ASVAB_EI</td><td>Electronics Information</td><td>07/01/2004</td><td>59.00</td><td>✓</td><td>17B</td><td>+ −</td></tr>
<tr><td>ASVAB_GS</td><td>General Science</td><td>12/18/2002</td><td>47.00</td><td>✓</td><td>17A</td><td>+ −</td></tr>
<tr><td>ASVAB_MC</td><td>Mechanical Comprehension</td><td>07/01/2004</td><td>66.00</td><td>✓</td><td>17B</td><td>+ −</td></tr>
<tr><td>ASVAB_MK</td><td>Mathematics Knowledge</td><td>07/01/2004</td><td>46.00</td><td>✓</td><td>17B</td><td>+ −</td></tr>
<tr><td>ASVAB_PC</td><td>Paragraph Comprehension</td><td>12/18/2002</td><td>56.00</td><td>✓</td><td>17A</td><td>+ −</td></tr>
</table>

Note: For a retest of an ASVAB/AFQT, <u>do not add an additional row</u>. Locate the previous entry, delete the existing date and score, type in the new score and the date of the retest. To work properly with the Training Administration System (TAS) a new row for a retest must not be inserted. Six months must elapse from the previous test score before a member can retest the entire ASVAB/AFQT or individual sub tests. Retest scores take precedence over scores previously entered, even if the retest scores are lower than the scores previously entered.</td></tr>
</table>

Continued on next page

Entering Test Results, Continued

Procedure (con't)

Step	Action
5	Complete the data fields as described below.

Field	Description/Instructions
Test** (completion of this field is required)	Click on the icon of the blank row to display the Lookup search page. Click **Lookup** to search for and display test names. From the Search Results list, you can choose a specific row of data. A single click on any column in that row will take you back to the Test Results page with the Test Name filled in. ***Example*** Test codes:

Code	Description	Code	Description
ACT-COMP	ACT Composite Score	GMAT-ANL	GMAT Analytical
AFQT	Armed Forces Qual Test	GMATQUAN	GMAT Quantitative Reasoning
ASVAB_AO	ASVAB Assembling Objects	GMAT-TTL	GMAT Total Score
ASVAB_AR	ASVAB Arithmetic Reasoning	GMAT-VER	GMAT Verbal
ASVAB_AS	ASVAB Auto & Shop Information	GRE-ANAL	GRE Analytical
ASVAB_CS	ASVAB Coding Speed	GRE-QUAN	GRE Quantitative
ASVAB_EI	ASVAB Electronics Information	GRE-VERB	GRE Verbal
ASVAB_GS	ASVAB General Science	LSAT	Law School Admissions Test
ASVAB_MC	ASVAB Mechanical Comprehension	SAT-MATH	SAT Math
ASVAB_MK	ASVAB Mathematics Knowledge		
ASVAB_NO	ASVAB Numerical Operations		
ASVAB_PC	ASVAB Paragraph Comprehension		
ASVAB_VE	ASVAB Verbal Ability		
ASVAB_WK	ASVAB Word Knowledge		

Field	Description/Instructions
***Test Date** (required)	Enter the Date the Test or retest was taken. Click the icon to open a calendar and choose the date. If you are viewing existing data: ~The date 01/01/1951 will appear if the test date was not available when the data was originally loaded into the system. ~The date 07/01/2004 will be listed if the score was updated per ALCOAST 318/04; ASVAB Renorming
***Score**	Enter the score of the Test that was taken.
Passed	Click this checkbox to indicate "Passed"
***Note**	For ASVAB scores, enter the version of the test that was administered (e. g. "17A"). The Note field is optional for other types of test results.

Continued on next page

Entering Test Results, Continued

Procedure (con't)

Step	Action
6	Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. Click the  button to save you work.

Correcting and Deleting Test Results

Introduction

This section provides the procedures for correcting and deleting test results.

Corrections

Follow the procedure in the Enter Test Results section and correct the fields as necessary.

Note: Do not edit, add, or remove Coast Guard Institute correspondence courses or Pay & Personnel Center SWE test results. Notify PPC Customer Care if errors are present.

Deletions

Follow this procedure to delete a test result entered in error. If only the score or date is incorrect, you can change that data by deleting it and entering the correct data then clicking save. It is not necessary to delete a test result unless the member never took that test.

Note: Do not delete CGI Correspondence Course or SWE test scores. Report any suspected errors to PPC Customer Care.

Step	Action
1	Click to delete an existing row of information. A warning will be displayed.
2	Click OK to delete the row or Cancel if you do not want to delete the test result.
3	Click the Save button to save you work.

Entering Foreign Language Test Results

Update Pending

Intro Please see E-Mail ALSPO B/12, Direct Access Technology Refresh - Person Profile, for new procedures.

The procedures in this section may still be used for viewing data, but any data updates must be processed as described in the ALSPO.

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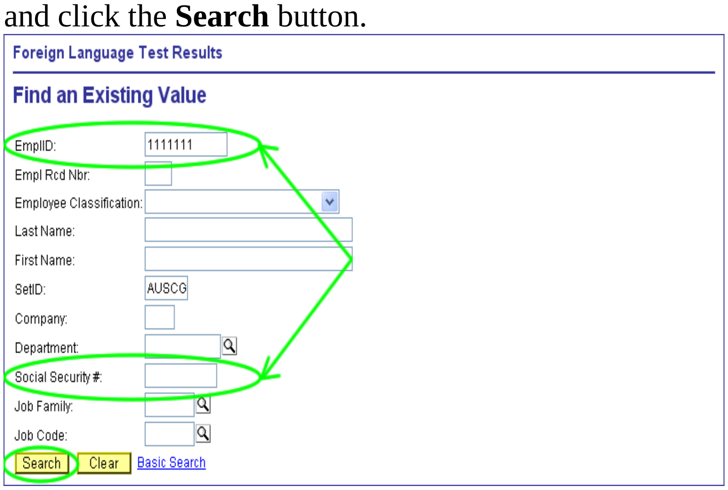
Note: In order for the member to be eligible for FLPP, Foreign Language/DLPT Test results must be entered following this procedure. Attempting to enter Foreign Language/DLPT Test results in the Test Results or Licenses and Certifications menus will not update the appropriate areas of the system.

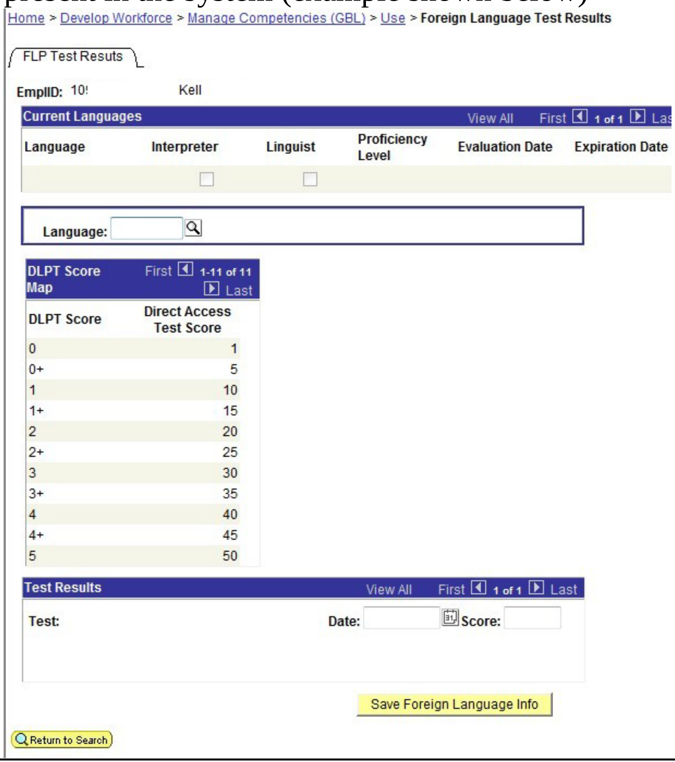
Procedure Sign into Direct Access and follow these steps to enter a member's DLPT results.

Step	Action
1	Select menu items in the following order: Enterprise Menu or Direct Access Content Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Foreign Language Test Results**
2	The **Foreign Language Test Results** screen will display. Enter the member's Employee ID Number in the **EmplID** field or the SSN in the **Social Security #** field and click the **Search** button.  ***Note:*** When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.

Continued on next page

Entering Foreign Language Test Results, Continued

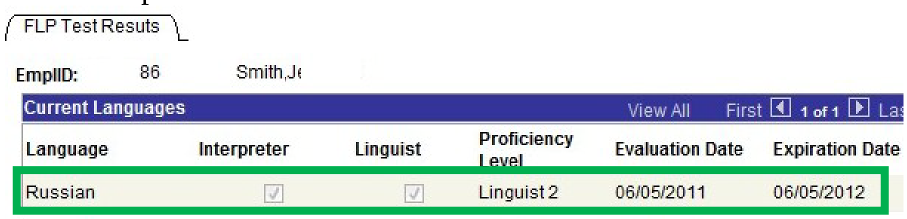
Step	Action
3	The **FLP Test Results** page will display. All the fields will be blank if the member does not have any Foreign Language skills present in the system (example shown below)



Continued on next page

Entering Foreign Language Test Results, Continued

Procedure (continued)

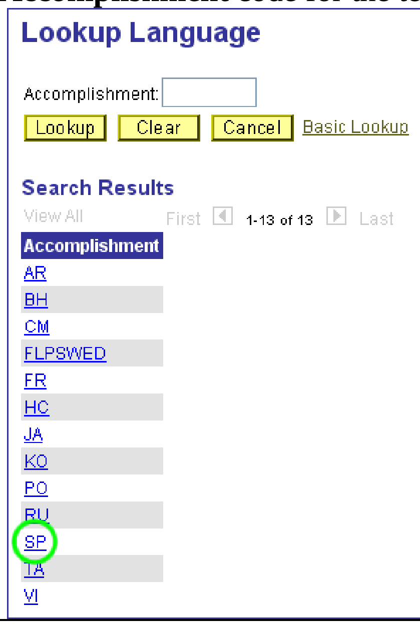
Step	Action
3	The **Current Languages** section will display any language data for a member who has previous test results entered (example shown below). These fields are **READ ONLY**. The **Interpreter** and **Linguist** qualification check-boxes will be marked by the system, based on the test scores entered. The Language and Test Results will not be displayed. Historical test data is not displayed on this page. Go to **Test Results** to view a member's previous test scores.  If the member has been tested in more than one language you can use the View All or arrow links to view the other results 
4	Click the lookup icon in the **Language** field to search for and select a language skill code. 

Continued on next page

Entering Foreign Language Test Results, Continued

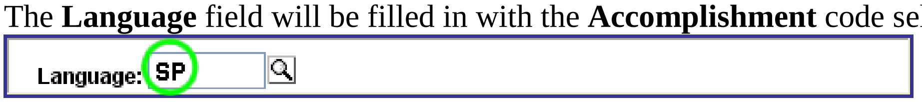
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The Lookup Language page will display. From the Search Results, click the Accomplishment code for the test you are recording

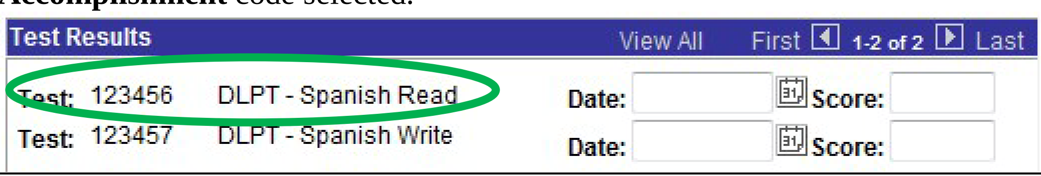


<table>
<tr><th>Accomplishment</th><th>Meaning</th></tr>
<tr><td>AR</td><td>Arabic</td></tr>
<tr><td>BH</td><td>Bahasa (Indonesian)</td></tr>
<tr><td>CM</td><td>Mandarin Chinese</td></tr>
<tr><td>FLPSWED</td><td>Swedish</td></tr>
<tr><td>FR</td><td>French</td></tr>
<tr><td>HC</td><td>Haitian-Creole</td></tr>
<tr><td>JA</td><td>Japanese</td></tr>
<tr><td>KO</td><td>Korean</td></tr>
<tr><td>PO</td><td>Portuguese</td></tr>
<tr><td>RU</td><td>Russian</td></tr>
<tr><td>SP</td><td>Spanish</td></tr>
<tr><td>TA</td><td>Tagalog (Phillipines)</td></tr>
<tr><td>VI</td><td>Vietnamese</td></tr>
</table>
</td></tr>
<tr><td>6</td><td>The FLP Test Results page will display again.

The Language field will be filled in with the Accomplishment code selected.



The Test Results section will display the test number and description based on the Accomplishment code selected.



</td></tr>
</table>

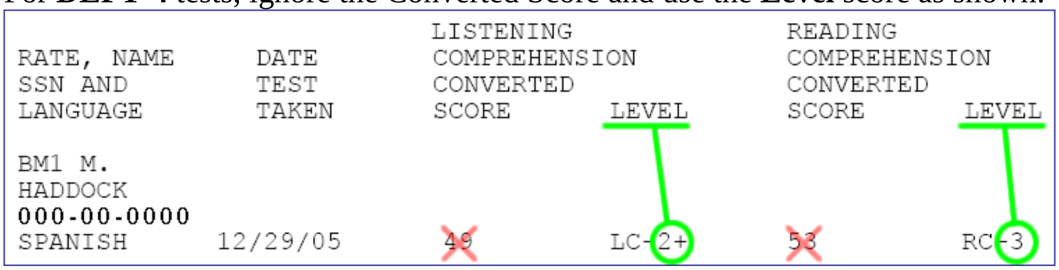
Continued on next page

Entering Foreign Language Test Results, Continued

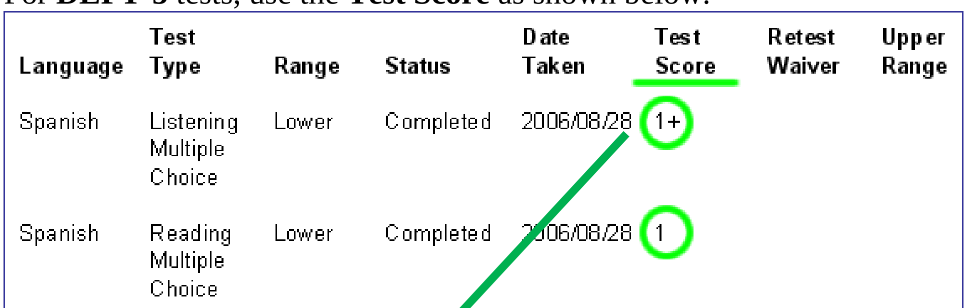
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>
Enter the test Date and test Score into the Test Results section.

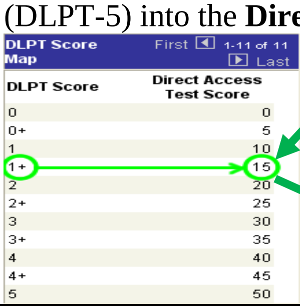
For DLPT-4 tests, ignore the Converted Score and use the Level score as shown:



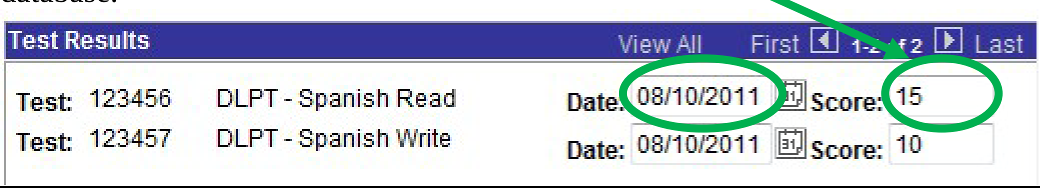
For DLPT-5 tests, use the Test Score as shown below.



Utilize the DLTP Score Map to convert the Level score (DLPT-4) or the Test Score (DLPT-5) into the Direct Access Test Score.



</td></tr>
<tr><td>8</td><td>
Enter the test Date and Direct Access Test Score into the Test Results section.
Note: You cannot enter a “0”. Leaving the score as blank results in writing a "0" to the database.



</td></tr>
</table>

Continued on next page

Entering Foreign Language Test Results, Continued

Procedure (continued)

Step	Action
9	Click the Save Foreign Language Info button to save the test scores. This will update the member's **Test Results**, **Languages**, and **Licenses & Certifications** and permit the SPO to start **Foreign Language Proficiency Pay** if the member's Commanding Officer authorizes it. **Note**: If you receive an error when attempting to save, it may be due to a missing test date on the member's **Test Results** page. Click the ***Open a New Window*** link and path to Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Test Results.** Review the existing test results entries and ensure each entry has a date. If a date is missing, enter the test completion date if known. If you do not know the test completion date use 01/01/1951, this is the default entry when an actual date is not available. Save any changes to the Test Results page, close the new window and return to the Foreign Language Test Results page and attempt to save again.

Section H - Training

Overview

Introduction

This section provides the procedure for updating a member's record of professional military training.

In this section

Topic	See Page
Training Individual	III-1-H-2
Training Multiple	III-1-H-7
Correcting and Deleting Training	III-1-H-12

Training Individual

Introduction

This section provides the procedures required for entering or updating a member's Training information in the system. Only formal military job-related training (Class "A" & "C" schools for example) is recorded in DA at this time. Non-Coast Guard Institute correspondence course completions and Distance Learning Courses for Reserve Component members are recorded in DA for reserve retirement point credit. Please see Part VII, Reserve Unique Transactions, Chapter 8, Retirement Points for Correspondence or, Distance Learning Courses for procedures. Unit training and other individual learning can be entered in the Training Management Tool.

Most unit training required to be in DA will be automatically uploaded from the Training Management Tool (TMT). A complete list of competencies and courses currently being loaded into DA is available on the AOPS/TMT Web Site http://aops.osc.uscg.mil/(CGWEB/CGSWS III only link).

Warning

Do not over type existing course completions! If you intend to record a new course or training completion, click the + first to insert a new row to work in.

Do not enter Coast Guard Institute correspondence courses here. Correspondence course completion data is loaded into the system automatically. Manually entering correspondence course completions will result in duplicate entries. However, non-Coast Guard Institute correspondence course completions and Distance Learning Courses for Reserve Component members are recorded in DA for reserve retirement point credit. Please see Part VII, Reserve Unique Transactions, Chapter 8, Retirement Points for Correspondence or, Distance Learning Courses for procedures

Reference

Refer to the following directives for additional information about recording training information.

(a) Performance, Training and Education Manual, COMDTINST M1500.10(series)
(b) Personnel and Pay Procedures Manual (4-C-2), PPCINST M1000.2(series)

Continued on next page

Training Individual, Continued

Process

Update a member's training history upon receipt of a Career Development Worksheet (CG-2030) or course completion roster from the member's unit. Some training information is automatically populated from the Training Administration System (TAS). The procedure documented here is for training information that has to be input manually or needs to be corrected due to cancellations or no-shows.

- If training is scheduled from TAS, an "enrollment" record is created for the member. This record appears as part of the member's training summary. When either the TRACEN (or other USCG site hosting the training) or TQC (in the cases of DOD or Commercial site) updates the session -- changing from Active to Complete -- any enrollment record associated with the class is updated to complete "automatically". In addition, if the course has any competencies or accomplishments associated with it, the member would "automatically" receive those as well.
- The SPO will not have to take any action unless the attendance field is not correct, i.e. member did not actually complete the course. Then the SPO can update from complete to incomplete, no-show or canceled.

If a Course Code is not present, contact PPC Customer Care to initiate the process of having it added to the database. After the new code is added, you can complete the transaction. Only formal military job-related training (Class "A" & "C" schools for example) is recorded at this time. Enter non-Class "A" or "C" School training, like: National Response Plan; National Incident Management System (NIMS); Incident Command System Courses in the Training Management Tool (TMT) in accordance with COMDTINST 5270.2 available at http://aops.osc.uscg.mil.

Note: **Do not attempt to edit, add, change, or remove Coast Guard Correspondence Course status or completion data.** Report any discrepancies noted to your ESO for investigation.

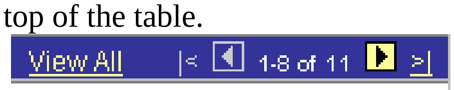
Non-Coast Guard Institute correspondence course completions and Distance Learning Courses for Reserve Component members are recorded in DA for reserve retirement point credit. Please see Part VII, Reserve Unique Transactions, Chapter 8, Retirement Points for Correspondence or, Distance Learning Courses for procedures.

Continued on next page

Training Individual, Continued

Procedure

Follow these steps to view, enter and/or modify training information.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Training**
2	Enter the employee ID in the EmplID field or the member's SSN in the National ID field and press the Search button. If you do not know the EmplID or SSN provide some search criteria, such as the member's last name and department number in the appropriate fields and perform a search. See Search Tips for help using the employee lookup.
3	The Training page displays. If the member does not have any previous training history, the page will open with a blank row displayed. You may enter data in this row. If you are entering or viewing existing results the page will display the first few rows of data. You can view the remaining rows by clicking on the links at the top of the table. 

Continued on next page

Training Individual, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
If a blank row is not displayed, click to insert an additional row of Training information.

Reminder: Do not over type existing course completions! If you intend to record a new course or training completion, click the first to insert a new row to work in.

Complete the data fields for the Course Information as described below.
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>*Course Code (completion of this field is required)</td><td>Enter the Course Code. If you do not know the code, click of the blank row to display the Lookup Course Code page. Complete the description field with the % character followed by part or all of the course title. Click Lookup to display possible matches. From the Search Results list, you can choose a specific row of data. A single click on any column in that row retrieves the page.</td></tr>
<tr><td>Course Title</td><td rowspan="2">Will default based on the value in the course code field.</td></tr>
<tr><td>Internal / External</td></tr>
<tr><td>Facility</td><td rowspan="3">Not applicable. If displayed, the data was automatically populated from the Training Administration System (TAS).</td></tr>
<tr><td>Language</td></tr>
<tr><td>Session #</td></tr>
<tr><td>Min</td><td rowspan="2">Not applicable. If displayed, the data was automatically populated from the Training Administration System (TAS), otherwise will display a "0".</td></tr>
<tr><td>Max</td></tr>
<tr><td># Enrolled</td><td rowspan="2">Not applicable. If displayed, the data was automatically populated from the Training Administration System (TAS).</td></tr>
<tr><td># Waiting</td></tr>
<tr><td>Start Date</td><td>Enter the Start Date of the training, i.e., CLCVN date.</td></tr>
<tr><td>Start Time</td><td>Not applicable. If displayed, the data was automatically populated from the Training Administration System (TAS).</td></tr>
<tr><td>End Time</td><td rowspan="2">Enter the End Date of the training (course Completion date).</td></tr>
<tr><td>End Date</td></tr>
<tr><td>School Name</td><td rowspan="2">Not applicable.</td></tr>
<tr><td>School Code</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Training Individual, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(con't)</td><td>Complete the data fields for the Student Information as described below.
<table>
<tr><td>Field</td><td>Description/Instructions</td></tr>
<tr><td>Prerequisites Met</td><td>Not applicable. If displayed, the data was automatically populated from the Training Administration System (TAS).</td></tr>
<tr><td>Date Needed</td><td></td></tr>
<tr><td>*Attendance (required field)</td><td>If blank, enter the Attendance status (normally will select Completed) or select it from the drop-down list box. Valid values are pre-defined in the Table. May be pre-filled from the Training Administration System (TAS).</td></tr>
<tr><td>Status Date</td><td>Will default to today's date. There is no need to update this field.</td></tr>
<tr><td>Training Reason</td><td>If blank, enter the Training Reason or select it from the drop-down list box. Valid values are pre-defined in the Table. If pre-filled, the data was automatically populated from the Training Administration System (TAS).</td></tr>
<tr><td>Waitlist Dt</td><td>Not applicable. If displayed, the data was automatically populated from the Training Administration System (TAS).</td></tr>
<tr><td>Business Unit</td><td>Defaults from Employee's Job Record, normally "AUSCG".</td></tr>
<tr><td>Department</td><td>If not preset by TAS, enter the Department where the training was completed.</td></tr>
<tr><td>Grade</td><td>If applicable, enter the Grade or select it from the drop-down list box.</td></tr>
<tr><td>Letter Code</td><td>Not applicable.</td></tr>
<tr><td>Letter Date</td><td>Not applicable.</td></tr>
</table></td></tr>
<tr><td>5</td><td>Click Save at the bottom of the page to save your work.

WARNING: Do not over type existing course completions! If you intend to record a new course or training completion, click the + first to insert a new row to work in. If you did not begin by entering a new row, exit the application. <u>Do not save your changes!</u></td></tr>
</table>

Training Multiple

Introduction

The Training Multiple allows the user to update the records for some or all members assigned to the same sub department that complete the same training course on the same date. The Training Multiple functionality can only be used to add training data, it cannot be used to delete or change training data previously entered.

Do not enter Coast Guard Institute correspondence courses here. Correspondence course completion data is loaded into the system automatically. Manually entering correspondence course completions will result in duplicate entries.

Non-Coast Guard Institute correspondence course completions and Distance Learning Courses for Reserve Component members are recorded in DA for reserve retirement point credit. Please see Part VII, Reserve Unique Transactions, Chapter 8, Retirement Points for Correspondence or, Distance Learning Courses for procedures.

Corrections / Deletions

You cannot correct or delete multiple training entries. If you make an error, you will need to correct the records using the Training Individual process.

Reference

Refer to the following directives for additional information about recording training information.
(a) Performance, Training and Education Manual, COMDTINST M1500.10(series)
(b) Personnel and Pay Procedures Manual (4-C-2), PPCINST M1000.2(series)

Continued on next page

Training Multiple, Continued

Process

Update a member's training history upon receipt of a Career Development Worksheet (CG-2030) or course completion roster from the member's unit. Some training information is automatically populated from the Training Administration System (TAS). The procedure documented here is for training information that has to be input manually or needs to be corrected due to cancellations or no-shows.

- If training is scheduled from TAS, an "enrollment" record is created for the member. This record appears as part of the member's training summary. When either the TRACEN (or other USCG site hosting the training) or TQC (in the cases of DOD or Commercial site) updates the session -- changing from Active to Complete -- any enrollment record associated with the class is updated to complete "automatically". In addition, if the course has any competencies or accomplishments associated with it, the member would "automatically" receive those as well.
- The SPO will not have to take any action unless the attendance field is not correct, i.e. member did not actually complete the course. Then the SPO can update from complete to incomplete, no-show or canceled.

If a Course Code is not present, contact PPC Customer Care to initiate the process of having it added to the database. After the new code is added, you can complete the transaction.

Only formal military job-related training (Class "A" & "C" schools for example) is recorded at this time. Unit training and individual learning can be entered in the Training Management Tool.

Most unit training required to be in DA will be automatically uploaded from the Training Management Tool (TMT). A complete list of competencies and courses currently being loaded into DA is available on the AOPS/TMT Web Site http://aops.osc.uscg.mil/aops.shtml(CGWEB/CGSWS III only link).

Menu Path

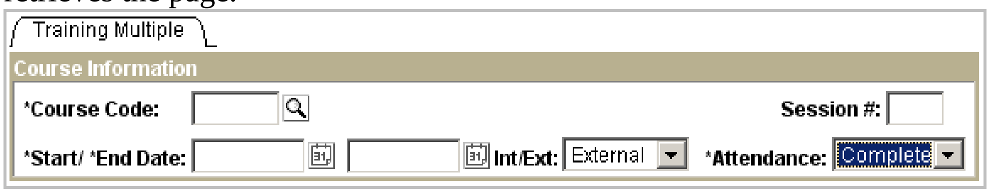
Select menu items in the following order.
Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Training Multiple**
The Training Multiple Page will display. There are two sections on this page to complete, the **Course Information** section and the **Selection Criteria.**

Continued on next page

Training Multiple, Continued

Completing the Course Information Section

Refer to the Field/Description table below to complete the Course Information section.

Field	Description/Instructions
***Course Code** (required field)	Enter the Course Code. If you do not know the code, click of the blank row to display the Lookup Course Code page. Complete the description field with the % character followed by part or all of the course title. Click Lookup to display possible matches. From the Search Results list, you can choose a specific row of data. A single click on any column in that row retrieves the page. 
Start/End Date	Enter the dates the training started and ended. Click the icon to look up the date if necessary. If training started and ended on the same date, the date entered would be the same date for both.
Session #	Enter the session number (may be left blank).
Internal / External	Set to External (default).
Attendance	Selected Completed (default).

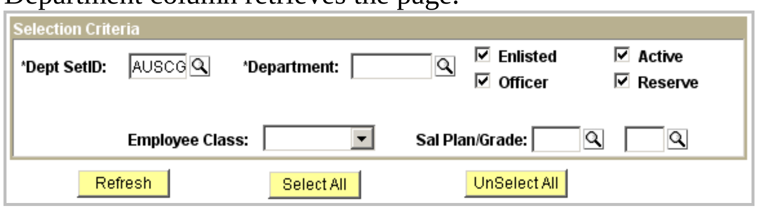
Continued on next page

Training Multiple, Continued

Completing the Selection Criteria Section

The Selection Criteria section allows you to pick the department number and personnel to assign the training course completion to.

Follow these steps to complete the Selections Criteria section.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Enter the sub department number in Department field. If you do not know the department ID number, click the icon of the blank row to display the Lookup Department search page. Enter partial search criteria. Click Lookup to display possible matches. From the Search Results list, you can choose a specific row of data. A single click on any item listed in the Department column retrieves the page.


Note: If the department you choose has sub departments, you will have to repeat this procedure for each sub department.</td></tr>
<tr><td>2</td><td>Select the status of personnel you would like to include by checking the boxes next to Enlisted, Active, Officer and Reserve as appropriate. Default is set to check all four-check boxes. Click the Refresh button to display a listing of personnel. If all four-check boxes are selected, all persons assigned to the department are returned in the search, including civilian personnel.

To obtain only a listing of active duty officers and enlisted members, keep the four check boxes selected. Using the drop down list box, select an Employee Class of Regular, and click on the Refresh button.
The four check boxes (Enlisted, Officer, Active, and Reserve) can be unchecked to modify the selection of members within a Department that will be displayed and therefore selected to receive the Training. For example, if you wanted only active duty enlisted, select only the Enlisted and Active check boxes. However, once one of the four check boxes is checked off, the Employee Class and Sal Plan / Grade cannot be used.
This search can be drilled down through the selection of a specific Employee Class and/or Sal Plan/ Grade. For example, if a listing of only SELRES members was desired, the four check boxes would remain checked, using the drop down list box select an Employee Class of SELRES and after pressing the REFRESH button, a listing of only SELRES members would be displayed.
Salary Plan must be completed in order to use Salary Grade.
Normally the first 5 members will be displayed. If you want the names of all members displayed, click on View 5 and it will change to View All.
To search for a particular member, select FIND and enter the member’s name in the explorer user prompt.
</td></tr>
</table>

Continued on next page

Training Multiple, Continued

Completing the Selection Criteria Section (con’t)

Step	Action
3	After the selection criteria are selected, press the **Refresh** button to fill the member list with the results of the search. Any time the selection criteria are changed, the refresh button should be pressed.
4	Press the Select All button to have all the members in the results section selected to receive the award. The Unselect All button will reverse this action. Check the box next to individual names to select only those members to receive the training course completion.
5	Carefully review the data you have entered before saving this transaction. Be absolutely sure that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. Otherwise, proceed to the final step.
6	Click  at the bottom of the page to commit the selected members’ training information to the database. If the save completes satisfactorily, the list of members will be erased. If the save was unsuccessful, error messages will appear and the selection results will remain displayed.

Correcting and Deleting Training

Introduction

This section provides the procedure for correcting and deleting training data.

Corrections

Follow the procedure in the Training Individual section to access the member's file and correct the fields as necessary.

Deletions

Follow these steps to delete an erroneous entry.

Step	Action
1	Click [–] to delete an existing row of information. A warning will be displayed.
2	Click OK to delete the row or Cancel if you do not want to delete the course history.
3	Click the [Save] button to save you work.

PPC SPO Manual

Part III – General Transactions

Chapter 2 – Employee Review

Overview

Introduction

This section provides detailed directions for entering an Employee Review for an Enlisted Member.

You can save your work at anytime during this process. The review does not have to be completed before you can save it. Frequent saves prevent the loss of data in the event of computer problems. After the review is saved, you can exit the system and return later to complete.

Reference

Coast Guard Personnel Manual COMDTINST M1000.6(series)

Contents

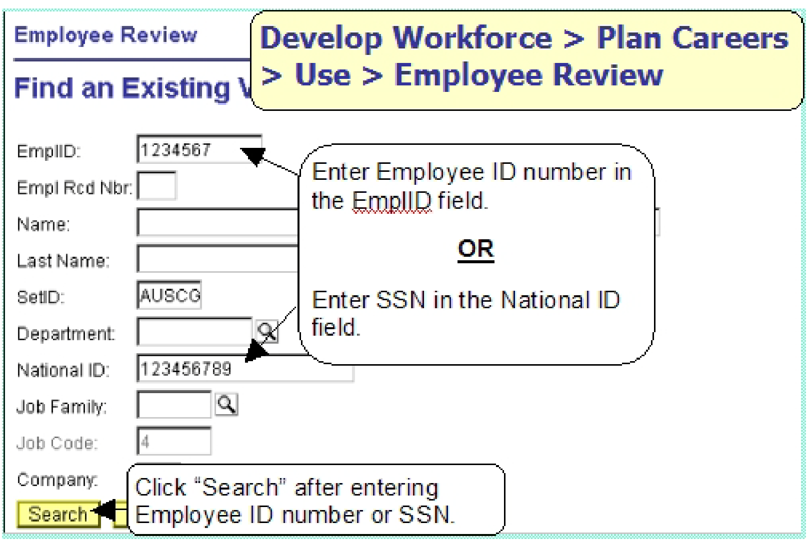
This chapter contains the following topics.

Topic	See Page
Entering an Employee Review for an Enlisted Member	III-2-3
Printing the Members Counseling Report	III-2-13
Changing the Advancement Recommendation in the Enlisted Employee Review	III-2-17
Employee Review Summary (Commands)	III-2-19
Employee Review Summary (Members)	III-2-23

Entering an Employee Review for an Enlisted Member

Procedures

Log into Direct Access and follow these procedures to complete an Employee Review.

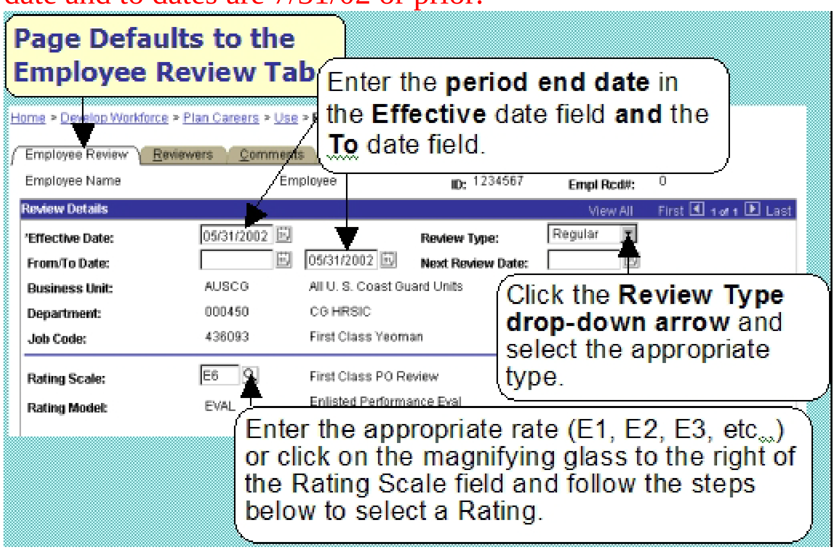
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Select from the home menu bar Develop Workforce, Plan Careers, Use, and Employee Review.
Enter an employee ID number and press the Enter button. Or perform a search and select from the available list. Since an employee may have multiple records, reflecting various stages in their career (e.g., military, civilian, and reservist), it is important to select the correct record.


When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.
</td></tr>
</table>

Continued on next page

Entering an Employee Review for an Enlisted Member,
Continued

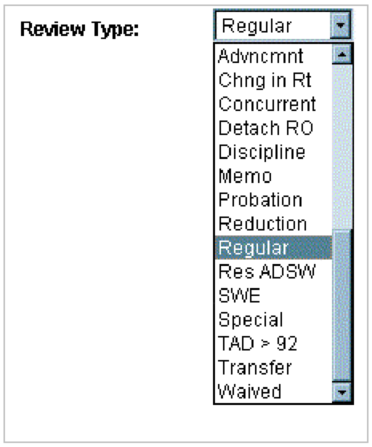
Procedures (con't)

Step	Action
2	On the employee review page, enter the evaluation period end date in the **effective date** field. Choose the effective date carefully, as it can not be updated easily later on (**If you change the dates you start the review process over and you will lose any data you have entered)**. Leave the **from date** field blank. Enter the evaluation period end date in the **to date** field. (**The effective date and to date fields must be the same**.) Leave the **next review date** field blank. Select a **review type** from the drop-down menu. Enter the **rating scale**. This is the set of dimensions to be evaluated for the member's pay grade. Select a review rating of E1 through E9 or ASCH for Class "A" School students. Do not use CPO, PO, NR, unless the effective date and to dates are 7/31/02 or prior. 

Continued on next page

Entering an Employee Review for an Enlisted Member,
Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2 (con't)</td><td>
<table>
<tr><td>Here is the drop-down menu for review type:</td><td>Here is a sample lookup of a rating scale:</td></tr>
<tr><td>


Note: The following Review Types are not used with Enlisted Employee Reviews.
Concurrent
Detach RO
Memo
Special
</td><td>


See the Changing the Advancement Recommendation for use of the CHANGE
OF CO RECOMMENDATION option.
</td></tr>
</table>
To be sure that you have entered the correct effective and to dates for a regular (annual or semi-annual) employee review.
• Click the Exceptions tab after entering the dates, review type and rating scale.
• Click the Validate Employee Review button. If you get the warning message:

"The month of the effective date must match the date in Review Scale Periods Table (CG_REVW_PRD_TBL) for RATING_SCALE=E5, and Empl Class=B, and Grade=E5 Month must be=04 or 10",

You should go back to the employee review tab and check your dates and the rating scale selection before proceeding.
</td></tr>
</table>

Continued on next page

Entering an Employee Review for an Enlisted Member,
Continued

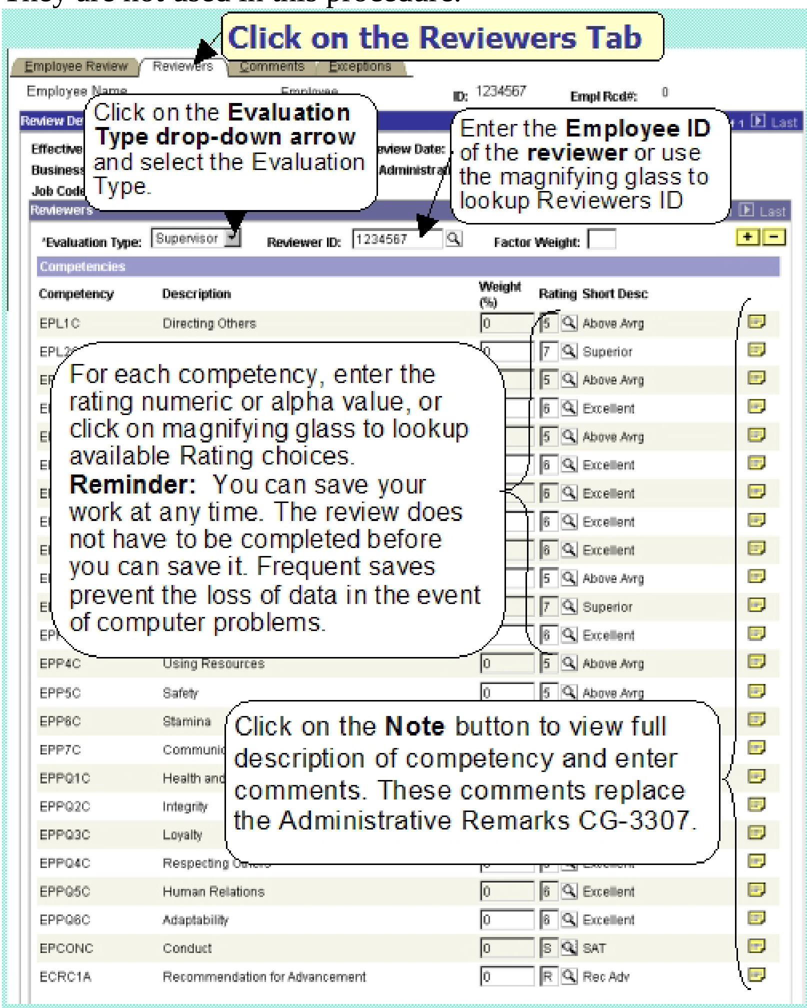
Procedures (con't)

Step	Action
3	Click the ***Reviewers*** tab. Select from the drop-down menu either supervisor, mark/rpt (marking official), or approved (final approval authority) for the evaluation type. • Enter the employee ID of the reviewer (in most cases this is your employee ID. However, **if you are entering the data on behalf of someone else,** i. e. "by proxy", then **enter that person's employee ID**). The competencies listed on this page are based on the rating scale entered on the employee review page. The factor weight should be left blank. • **Rating box**, enter the mark that you want to assign to each competency (e.g., 6) or click the lookup key to review the available choices. Use the numeric values to rate all competencies on the list, except for the conduct and advancement recommendation. • **Conduct competency**, use satisfactory or unsatisfactory (S or U). • **Advancement recommendation** competency, use recommended or not recommended (R or N). A message will display indicating the alpha characters will not compute for the rating average, click ***OK***. (If you enter an unsatisfactory or not recommended mark (U or N), enter reviewer comments.

Continued on next page

Entering an Employee Review for an Enlisted Member,
Continued

Procedures (con't)

Step	Action
3 (con't)	**Warning**: Do not click the add [+]/remove [−] rows icons on the reviews tab. They are not used in this procedure.  *(Note: Entire list of competencies NOT shown)*

Continued on next page

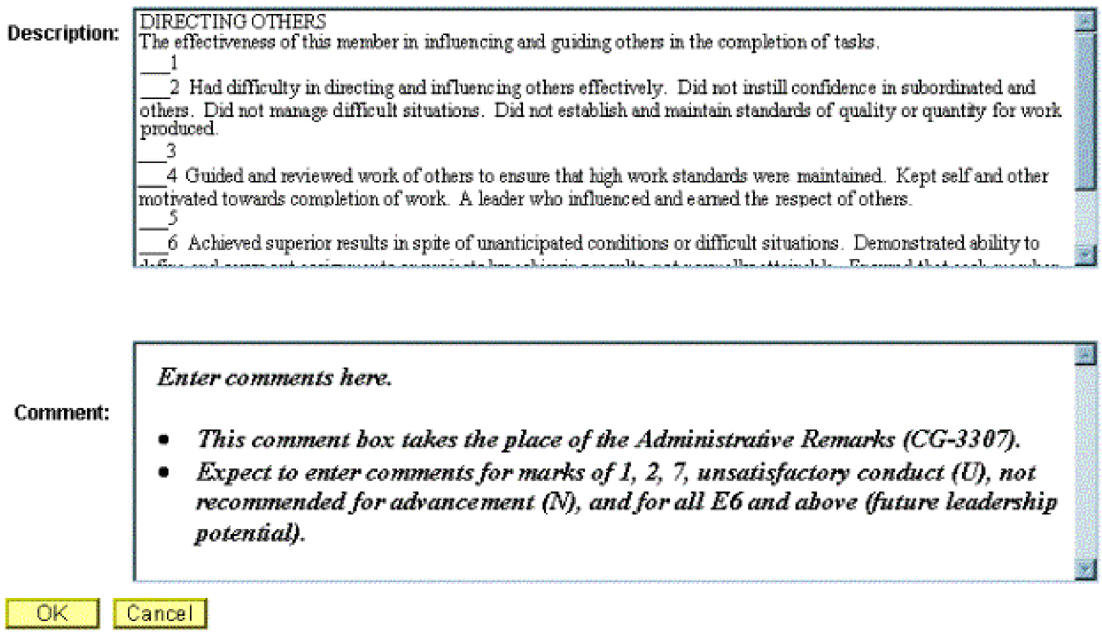
Entering an Employee Review for an Enlisted Member,
Continued

Procedures (con't)

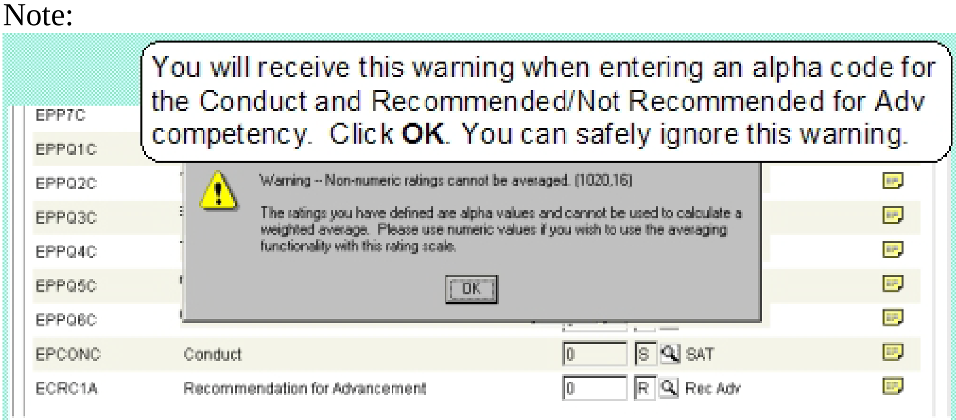
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3
(con't)</td><td>

<u>To review a competency description or enter reviewer comments:</u>

Press the yellow note icon along the right margin. Review the full description of the competency. To enter competency-specific comments for this member, type them into the comment box. The comment box takes the place of Administrative Remarks (CG-3307). Review the screenshot below for examples of other comments that are entered on this page. Press OK when you complete each comment.



Note:



</td></tr>
</table>

Continued on next page

Entering an Employee Review for an Enlisted Member,
Continued

Procedures (con't)

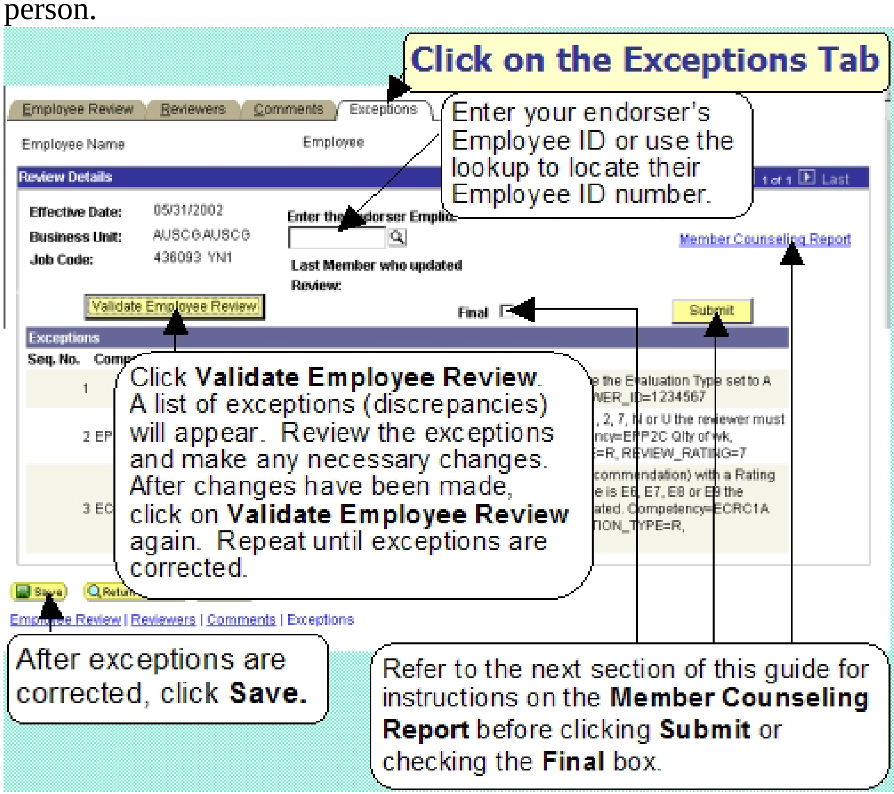
Step	Action
4	Click the ***Comments*** tab. In the comment box, enter comments for others in the rating chain. These comments will be deleted once the evaluation is saved as "final". 

Continued on next page

Entering an Employee Review for an Enlisted Member,
Continued

Procedures (con't)

Step	Action
5	Click the ***Exceptions*** tab. Press the ***Validate Employee Review*** button. This will generate a list of exceptions, including errors found on the employee review. Read each exception, find the error (if applicable), and correct it. (For our screenshot, we created an exception message indicating a mismatch selecting the rating scale. To correct this type of error, you must go back to the employee review page, correct the scale, then re-enter the employee review.) After corrections are made, click the ***Validate Employee Review*** button again. Review the list of exceptions again. If an exception is corrected, it will not reappear on the list.
	Note: If you are entering an employee review with an effective date of **7/31/02** or earlier you may ignore the exception message pertaining to a mismatch between the member's pay grade and rating scale.
	Once you are satisfied with the exceptions, enter the employee ID for the next person in the rating chain (the next person to review the employee review). If you are not the approving official, press the ***Submit*** button to route the employee review to the next person.



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Entering an Employee Review for an Enlisted Member, Continued

Procedure (con't)

Step	Action
6	When the review has been completed by the entire rating chain, the approving official or his/her representative **must:** **1)** create the member counseling report, then **2)** click the final checkbox, and **3)** press the ***Submit*** button.
	Note: Leave the **Endorser Emplid** box blank when using the **Final** checkbox. The Endorser Emplid box is only used to route the employee review to the next person's worklist (and notify them via email). If you enter an ID and submit the review as final, the person will get an email but won't be able to access the review because it has already been submitted to PSC. If you are finalizing and submitting an employee review on behalf of someone else (e. g. By proxy), then enter the approving official's ID on the **Reviewers** tab in the **Reviewer ID** box (see step 3 above).
	The review will undergo quality assurance processing at PSC (ADV). Once PSC (ADV) completes its processing, usually within 30 days, the review will become available to the member through the PeopleSoft self-service menu and to the command through the Command self-service menu. **Note**: The employee review is routed to the endorser's work list. To access your work list, select from the home menu bar ***People Tools, Worklist, Use,*** and ***Worklist.*** For additional information on using the worklist, see the Using Worklist topic.
7	You can now print the members Counseling Report

Printing the Members Counseling Report

Introduction

This section provides the procedure for printing the member counseling report.

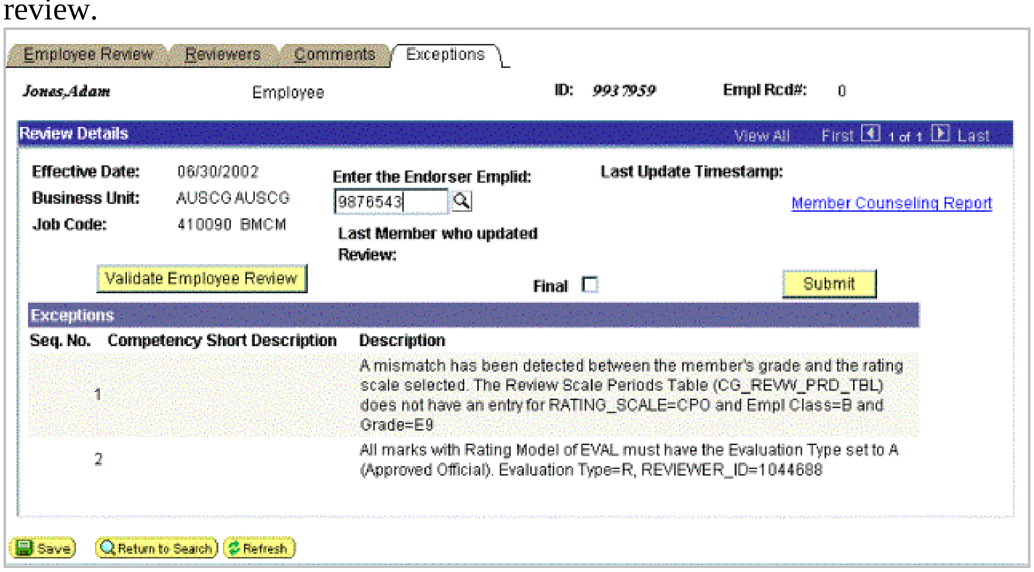
The member should be given the original counseling receipt. He/she will use this as the basis for an appeal. The appeal period begins on the date the member signs the form.

Commands are not required to keep a copy of the counseling receipt since the appeal process is driven by the member and the marks will be captured in the system. Also, please remember that a data error should not be confused with the appeal process.

If the member reviews the receipt, signs off, and then notices that the marks entered in the system are not the same as the counseling receipt, he/she should approach the command so the data can be corrected. The appeal period does not apply in this case.

Procedures

The counseling report is accessed from the exceptions tab of the employee review.

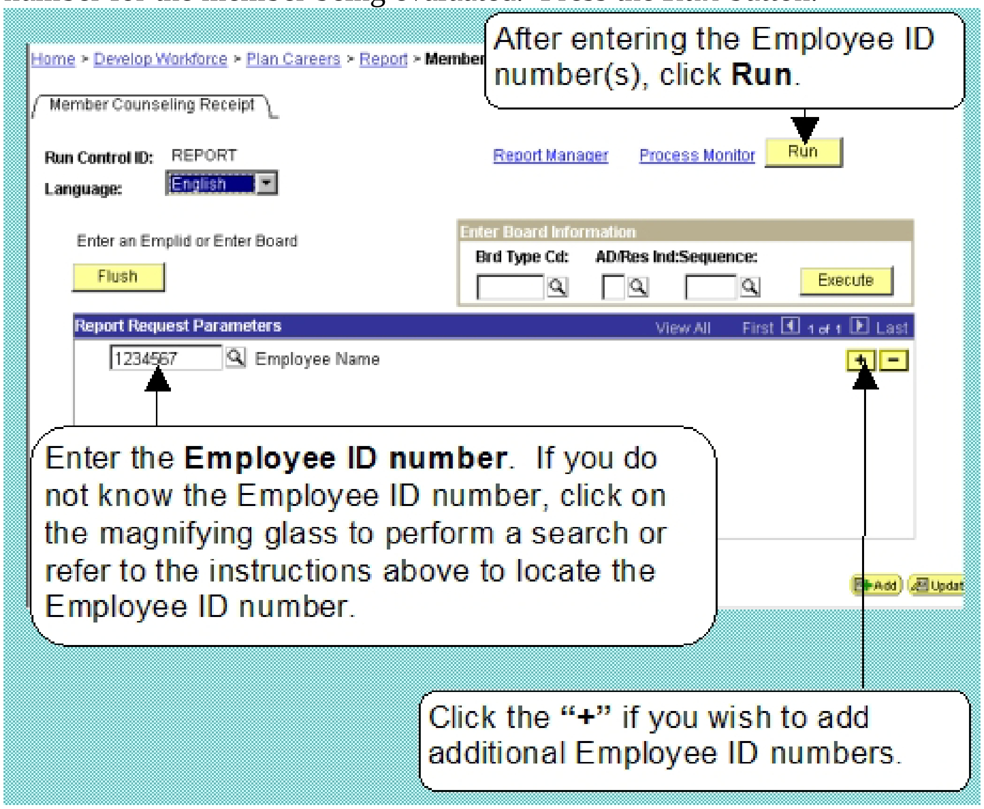


Create a member counseling report by clicking the link (upper right-hand corner). This will open a new window for the report.

Continued on next page

Printing the Members Counseling Report, Continued

Procedures (con't)

Step	Action
1	Select the language for the report from the drop-down list. Enter the employee ID number for the member being evaluated. Press the ***Run*** button.  **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**

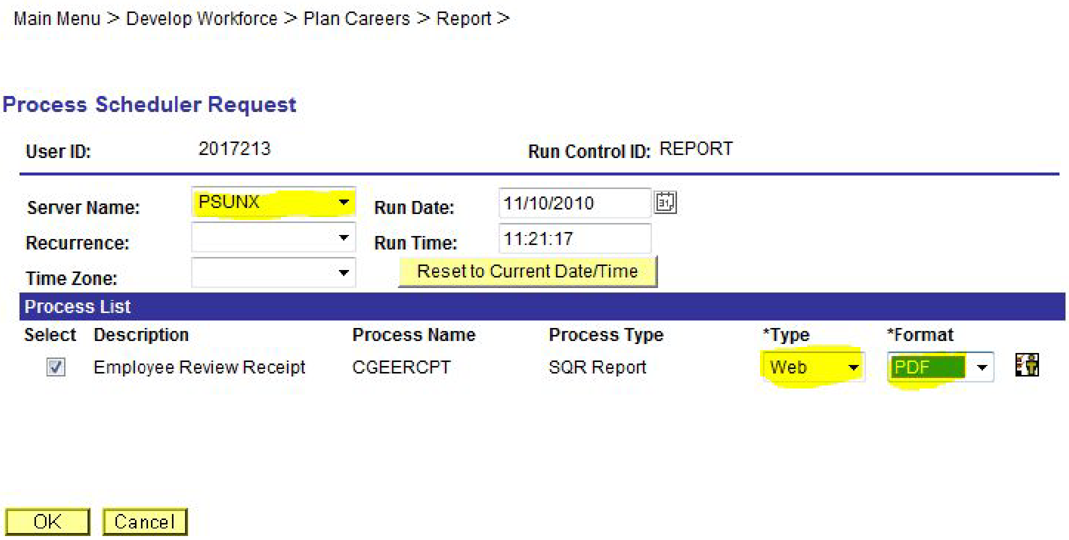
Continued on next page

Printing the Members Counseling Report, Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>When the Process Scheduler Request page appears, set the parameters as follows:

Click the Server Name drop-down menu and select the PSUNX server.
Click the Type drop-down menu and select Web.
Click the Format drop-down menu and select PDF.
Press OK when finished.



Note: Leave the Recurrence and Time Zone fields blank.</td></tr>
<tr><td>3</td><td>The Process Monitor will open.

<u>Reminder:</u> Once the member counseling report is sent, the approving official or his/her representative will click the final checkbox and press the Submit button on the exceptions page.</td></tr>
<tr><td>4</td><td>Click the <u>Process Monitor</u> link in the upper right-hand corner of the Process Scheduler Request page.</td></tr>
<tr><td>5</td><td>The Process Monitor page will display. Click the Refresh button periodically until the Run Status shows "Success" and the <u>Details</u> link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.</td></tr>
<tr><td>6</td><td>Click the <u>Details</u> link. The Process Detail Page will display. Click the <u>View Log/Trace</u> link.</td></tr>
</table>

Continued on next page

Printing the Members Counseling Report, Continued

Procedures (continued)

Step	Action
7	The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, cgeercpt_6657102.pdf is the link to the report).

Accessing and Printing the Counseling Report from the Menu Path

You can also access the most recent counseling report of a member by following the path: Home>Develop Workforce>Plan Careers>Report> **Member Counseling Report**.

The Run Control ID Entry Page will appear.
If you have used this process before, enter your initials in the Run Control ID block and click the Search button.

If this is the first time you have used this process, click the Add a New Value link.

1. Enter your initials in the Run Control ID block.
2. Click the Add button.

Refer to Step 1 (above) to complete the procedure.

Changing the Advancement Recommendation in the Enlisted Employee Review

Introduction

The following procedures are used when a Commanding Officer is only changing the advancement recommendation on an existing EER.

Procedure

When changing the CO Advancement Recommendation:

- The **Approving Official** initiates a new EER in Direct Access and selects change of CO RECOMMENDATION (CORC) as the **rating scale**. This creates an abbreviated EER with only the new recommendation.

- The **Approving Official** then makes the new advancement recommendation and enters comments in the comments area explaining the reason(s) for the change.

It is critical that the approving official makes the change using their own login access and clicks the submit button, thus putting their electronic ID on the change and allowing for verification of the legitimacy of the change. Both the new and the original EER remain in the mbr's record so there is a complete EER history.

Additional Information

- An approving official experiencing connectivity difficulty should contact PSC (adv) by the best means available for assistance.
- All changes made using this procedure will be reviewed by PSC (adv) to determine the impact on the members advancement eligibility and standing on any advancement eligibility list.
- A member receiving a change to **not recommended** will be declared ineligible for any upcoming SWE and will have their name removed from any applicable advancement eligibility list.
- A change to **recommended**, designed to allow the member to participate in SWE competition must be completed prior to that SWE's eligibility deadline date. No backdating of changes will be allowed after that date has passed.
- For **supplemental advancements**, the change to recommended must be completed and viewable in Direct Access before forwarding the request for member to be placed on the Supplemental Advancement List.

Employee Review Summary (Commands)

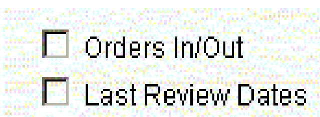
Introduction

The Enlisted Employee Review module provides commands with the ability to view an enlisted member's employee review history. This application replaces form CG-3306.

The Enlisted Employee Review Summary is limited to authorized personnel with - ***Command Users*** access.

Additional Information

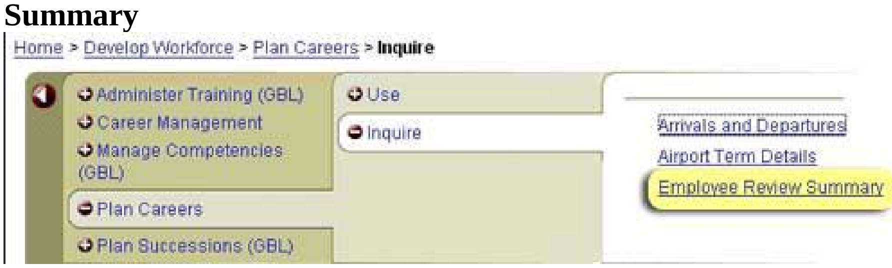
This procedure is for viewing Employee Reviews on an individual basis. The Personnel at A Department query, accessed via the Airport Terminal, provides a listing of **all personnel and positions at a department**. After the roster runs you can add additional details to the information already displayed by selecting the Orders In/Out or Last Review Dates checkboxes.



Remember, to click the **Refresh Summary** button to view the newest employee review.

Procedure

Log into Direct Access and follow these procedures to view a members EER. The data fields on the employee review page are self-explanatory.

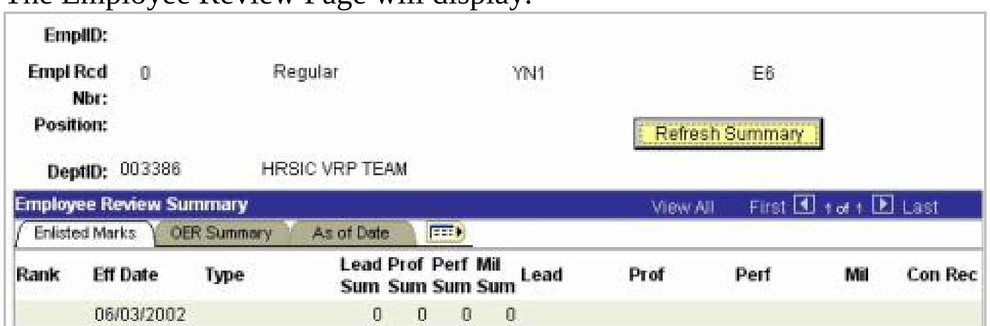
Step	Action
1	Select menu items in the following order: Home > Develop Workforce > Plan Careers > Inquire > **Employee Review Summary** 

Continued on next page

Employee Review Summary (Commands), Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Enter the member's employee ID number in the Emplid field and click the search button. Use the icon to open a search page if you do not know the employee ID number. See Employee ID Search Tips for more information.
The Job Code filed will default to "4"' (Enlisted) and cannot be changed.
When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.</td></tr>
<tr><td>3</td><td>The Employee Review Page will display.

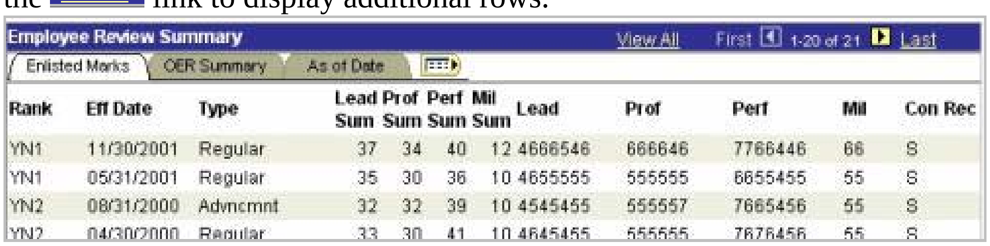


EmplID:
Empl Rcd Nbr: 0 Regular YN1 E6
Position: Refresh Summary
DeptID: 003386 HRSIC VRP TEAM
Employee Review Summary View All First 1 of 1 Last
Enlisted Marks | OER Summary | As of Date

Rank	Eff Date	Type	Lead Sum	Prof Sum	Perf Sum	Mil Sum	Lead	Prof	Perf	Mil	Con Rec
	06/03/2002		0	0	0	0					

Click the Refresh Summary button. This will update the display to show the most recent evaluation on file.

The Enlisted Marks tab shows the dates of the evaluations along with the type and advancement recommendations. The most recent evaluation is displayed first. Click the View All link to display additional rows.



Employee Review Summary View All First 1-20 of 21 Last
Enlisted Marks | OER Summary | As of Date

Rank	Eff Date	Type	Lead Sum	Prof Sum	Perf Sum	Mil Sum	Lead	Prof	Perf	Mil	Con Rec
YN1	11/30/2001	Regular	37	34	40	12	4666546	666646	7766446	66	S
YN1	05/31/2001	Regular	35	30	36	10	4655555	555555	6655455	55	S
YN2	08/31/2000	Advncmnt	32	32	39	10	4545455	555557	7665456	55	S
YN2	04/30/2000	Regular	33	30	41	10	4645455	555555	7676456	55	S

The OER Summary tab is not applicable to enlisted personnel. The As of Date tab shows the date the database was last updated</td></tr>
</table>

Continued on next page

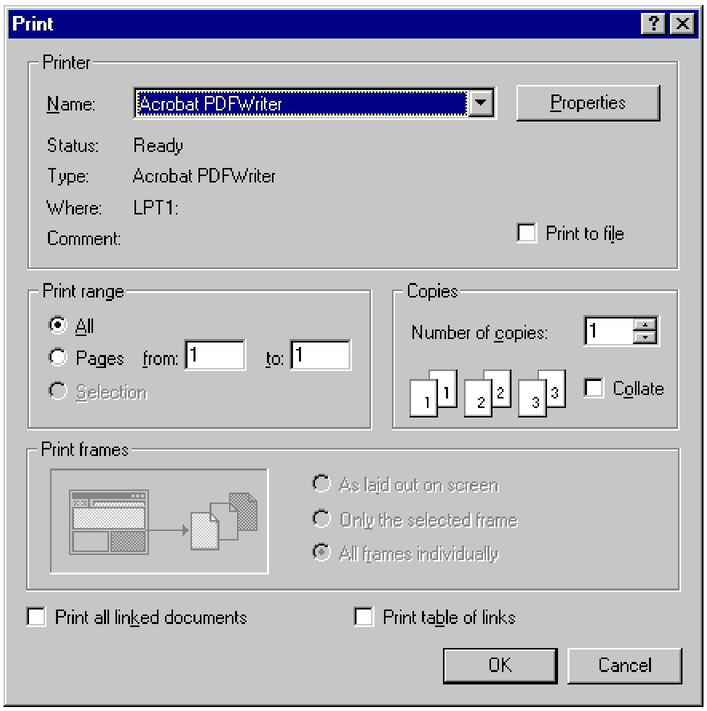
Employee Review Summary (Commands), Continued

Printing a EER

Click the View All link at the top of the table to display all rows. Click the Internet Explorer Printer Icon on the tool bar at the top of the window, or choose **File** > **Print** from the menu bar to print the page.

Saving a Copy

If you are on Coast Guard Standard Workstation III, or have Adobe Acrobat® (full version) installed on your computer you can print the page to a PDF file. The file can then be printed, saved or sent, via email, to another person. To create a PDF file choose **File** > **Print** from the menu bar and set the printer to Acrobat PDF Writer. Click the OK button on the print dialog box. PDF Writer will prompt you for a file a name and the location to save the PDF file to.



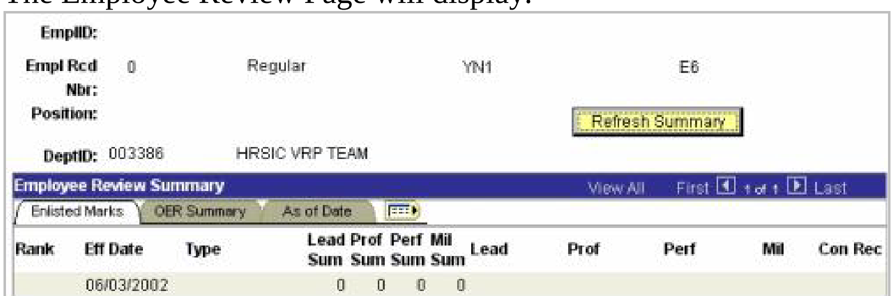
Employee Review Summary (Members)

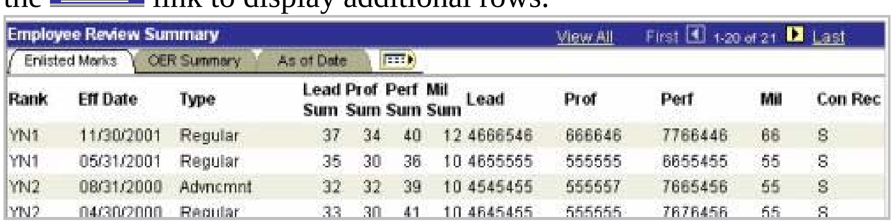
Introduction

The Employee Review Summary provides members with the ability to view their enlisted marks history. Officers will be able to view an OER summary. This application replaces form CG-3306.

Procedure

Log into Direct Access and follow these steps to view your employee reviews. The data fields on the employee review page are self-explanatory.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Enter your Operator ID and Password in the appropriate fields and click the Sign In button.</td></tr>
<tr><td>2</td><td>Select menu items in the following order:
Home > Self-Service > Employee > View > Employee Review Summary</td></tr>
<tr><td>3</td><td>The Employee Review Page will display.


Click the Refresh Summary button. This will update the display to show the most recent evaluation on file.
The Enlisted Marks tab shows the dates of the evaluations along with the type and advancement recommendations. The most recent evaluation is displayed first. Click the View All link to display additional rows.


The OER Summary tab is not applicable to enlisted personnel. The As of Date tab shows the date the database was last updated.</td></tr>
</table>

Printing

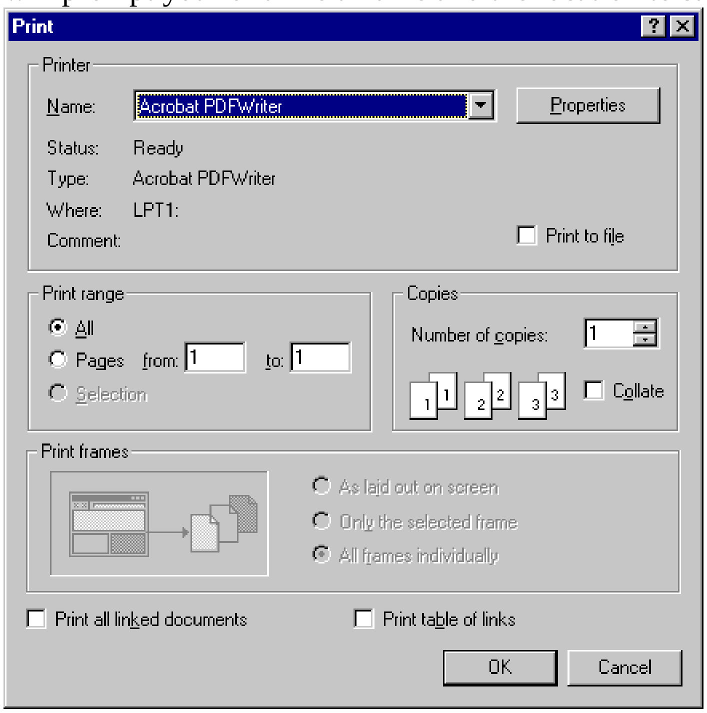
Click the View All link at the top of the table to display all rows. Click the Internet Explorer Printer Icon on the tool bar at the top of the window, or choose **File** > **Print** from the menu bar to print the page.

Continued on next page

Employee Review Summary (Members), Continued

Saving a copy

If you are on Coast Guard Standard Workstation III, or have Adobe Acrobat® (full version) installed on your computer you can print the page to a PDF file. The file can then be printed, saved or sent, via email, to another person. To create a PDF file choose **File** > **Print** from the menu bar and set the printer to Acrobat PDF Writer. Click the OK button on the print dialog box. PDF Writer will prompt you for a file a name and the location to save the PDF file to.



PPC SPO Manual

Part II, General Transactions

Chapter 3, Advancements

Overview

Introduction

The objective of this section is to provide a concise, user friendly job aid for the user at the Servicing Personnel Office (SPO) to complete an advancement in rating add/remove a designator, or enter a change in rating, or reduction event in PeopleSoft. The CWO Appointment procedure is proved for users at CGPC (OPM) only.

The only advancements input by the Servicing Personnel Office (SPO) are:

(a) non-rated advancement;
(b) advancement of a member with a designator to E-4;
(c) advancement after a reduction
(d) adjust Overseas Housing Allowance upon pay grade changes
(e) adjust Inadequate Quarters Rental Charge upon pay grade changes

SPOs shall not attempt to use this transaction for any other purpose.

References

The following references contain information about advancements, reductions, designators and rating changes.

a. Personnel and Pay Procedures Manual, PSCINST M1000.2 (series)
b. Pay Manual, COMDTINST M7220.29 (series)
c. Personnel Manual, COMDTINST M1000.6 (series)
d. Enlisted Qualifications Codes Manual, COMDTINST M1414.9 (series)
e. Training and Education Manual, COMDTINST M1500.10 (series)

Contents

This chapter contains the following topics.

Topic	See Page
Advancement/Change in Rating/Adding a Designator	III-3-3
Reduction/Removal of Designator	III-3-9
CWO Appointment (CGPC only)	III-3-13
School/Recruit Training Advancements	III-3-19

Continued on next page

Overview, Continued

Refer to this table to determine responsibility for preparing advancement/promotion action.

	Transaction/Responsibility				
Advancement / Promotion Reason	**Advancement / Promotion/ Designator (H301, P555)**	**Discharge (P203)**	**Officer Uniform Allowance Claim (L66B)**	**OHA (P609) or Inadequate Quarters Rental (P607) if applicable**	**Cancel Payment of SRB (P602) if applicable**
Resumption of Enlisted/CWO status upon termination as a temporary officer.	N/A. Discharge / Accession required. See: DA Guide for Accessions	Servicing Personnel Office	N/A	Servicing Personnel Office	
MARTP (Reserve Officer) Appointment	N/A. Accession required. See: DA Guide for Accessions	Servicing Personnel Office	Servicing Personnel Office (See Note 1)		
Officer Promotion	CGPC (opm/rpm)	N/A	System Generated	Servicing Personnel Office	
CWO Appointment (Active Duty)	CGPC (opm)	System Generated	System Generated	Servicing Personnel Office	
CWO Appointment (Reserve)	CGPC (rpm)	System Generated	Servicing Personnel Office (See Note 1)		
Enlisted SWE, Striker or Supplemental Advancement (authorized by EPAA or HRAA)	CGPC/PSC (ADV)			Servicing Personnel Office	N/A
Change in Rating (authorized by EPAA or HRAA)	CGPC/PSC			N/A	Servicing Personnel Office
Change in Rating (enlisted member attending OCS or rated member graduating "A" school)	TRACEN Personnel Office (See Note 2)				Servicing Personnel Office
Non-Rated Advancement	Servicing Personnel Office (See Note 2)			Servicing Personnel Office	N/A

Continued on next page

Overview, Continued

Refer to this table to determine responsibility for preparing advancement/promotion action, continued.

	Transaction/Responsibility				
Advancement of a member with a designator to E4	Servicing Personnel Office (See Note 2) See: Advancement/Add a Designator Overview			Servicing Personnel Office	N/A
Advancement after reduction	Servicing Personnel Office			Servicing Personnel Office	N/A
Assignment of Designator as a result being added to Striker advancement eligibility list	PSC (ADV)				
Assignment of Designator as a result of graduation from Class "A" school	TRACEN Personnel Office				
Removal of Designator	Servicing Personnel Office See: Reduction/Remove Designator Section Overview			N/A	Servicing Personnel Office
Reserve Training Rating	Servicing Personnel Office See: Member Training Rating			N/A	N/A
Reduction (non disciplinary) (e. g. Reduced to E5 to attend Class "A" school)	Servicing Personnel Office (See Note 2)			Servicing Personnel Office	Servicing Personnel Office

Notes: (1)The servicing Personnel Office submits the Officer Uniform Allowance Claim through Direct-Access once the Reserve Officer meets the requirements of section 3.K.2.a, CG Pay Manual (the applicable claim code is "B", not "D").

(2)These transactions are submitted through Direct-Access using the Advance/Promote One Member Page, for individuals. Or the Boards process for Training Center Personnel Offices.

Advancement/Change in Rating/Adding a Designator

Introduction

This section provides the procedures to advance a member, change a members rating or add a designator in Direct-Access.

The only advancements input by the SPO/HRS using this procedure are:
- non-rated advancement;
- advancement of a member with a designator to E-4;
- advancement after a reduction

The SPO/HRS must also:
- cancel a Selective Reenlistment Bonus (SRB)
- adjust Overseas Housing Allowance upon pay grade changes
- adjust Inadequate Quarters Rental Charge upon pay grade changes

Advance/ Promote One Member

When to use: The Advance/Promote One Member page is used to complete the necessary transactions on a member for:

- Advancement.
- Adding a designator.
- Change in rating.

When not to use: This page should **not** be used for:

- Resumption of Enlisted/Warrant status upon termination as a temporary officer. Officers authorized to resume their permanent grade or rate must be discharge and re-accessed (rehired at their permanent grade or rate. Follow procedures in Chapter 8 (Discharge to Enlistment/Accession) of the DA Guide for Accessions (http://www.uscg.mil/hq/cg1/psc/guides/accessions.pdf).
- Members who are being advanced by the Enlisted Personnel Advancement Authorizations (EPAA) or Headquarters Reserve Advancement Authorizations (HRAA).
- Members advanced upon graduation from Recruit Training or Class ‘A’ school. Use the Maintain Boards and Panels page to advance multiple members of the same class or company as the same time. (However, the Advance/Promote One Member page may be used to advance individual graduates if necessary). See Section E, School-Based Advancements for procedures.
- Cadet Graduation. See the Accessions Overview for procedures.

Continued on next page

Advancement/Change in Rating/Adding a Designator, Continued

Pay and Personnel System Updates

Direct Access: The Advance/Promote 1 Member Page inserts a new row in the member's job data page (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) and updates the Job Data on the Career Information Tab of the CG Member Information Page (Develop Workforce > Plan Careers > Use > CG Member Info).

JUMPS: The Advance/Promote 1 Member Page generates a JUMPS P555 transaction with one of the following element codes:

- 01 -- if the **Advance To** radio button was selected.
- 34 -- if the **Change in Rating** radio button is selected.
- 45 -- if the **Add Designator** radio button was selected.
- Updates information on page 1 (General Information) of the PMIS screens in the PMIS Data Base.
- Sets fixed data fields on segment 00 of the pay file in JUMPS.
- Updates segments 01, 58 and any other pay and allowances segments that have to be changed due to advancement.

VERY IMPORTANT: If member is receiving SRB, Overseas Housing Allowance (OHA) at the time of advancement, then an OHA transaction must be done to change the OHA status. Also, if member is in inadequate quarters, an Inadequate Quarters transaction must be completed to show the new rental charge for Inadequate Quarters.

Other Transactions which may be required.

The following transactions may also be required when a member's pay grade changes:

Cancel Selective Reenlistment Bonus (SRB): This transaction must be used if the member is currently receiving a Selective Reenlistment Bonus and, due to a change in rating, the bonus must be cancelled or suspended.

Overseas Housing Allowance: If member is receiving Overseas Housing Allowance (OHA) at the time of advancement/reduction, then an OHA transaction must also be completed to show a change in the member's OHA status.

Inadequate Quarters Rental Charge: If the member is in inadequate quarters, then an Inadequate Quarters transaction must be completed to show the new rental charge for Inadequate Quarters

Continued on next page

Advancement/Change in Rating/Adding a Designator, Continued

Procedure

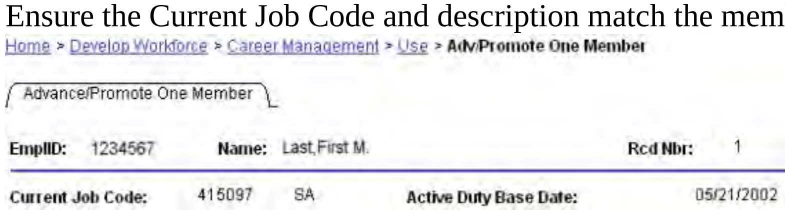
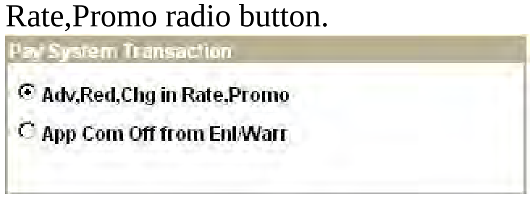
Start Direct-Access, sign in and follow these steps to
- Advance a member
- Add a designator
- Change in Rating

Reminder: **The only advancements input by the SPO/HRS using this procedure are:**

- non-rated advancement;
- advancement of a member with a designator to E-4;
- advancement after a reduction

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order to access the Advance/Promote 1 Member page:

Develop Workforce > Career Management > Use > Adv/Promote One Member</td></tr>
<tr><td>2</td><td>A search page will appear. Enter the member's employee ID number or other search criteria and click the Search button to select the member you wish to display.

Note: When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.</td></tr>
<tr><td>3</td><td>The Advance/Promote 1 Member page will display. Verify the member's employee ID and name to ensure you have selected the correct record from the search results. Ensure the Current Job Code and description match the member's pay grade/rating.

</td></tr>
<tr><td>4</td><td>Complete the Pay System Transaction field by selecting the ADV,Red,Chg in Rate,Promo radio button.

</td></tr>
</table>

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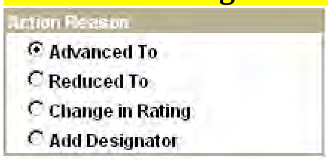
Advancement/Change in Rating/Adding a Designator, Continued

Procedure (continued)

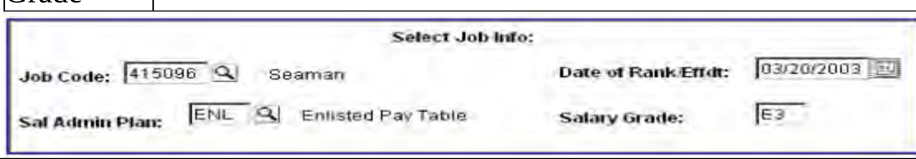
Step	Action
5	**When advancing a member, select the Advanced To action field**:



If	Then select
Advancing the member or advancing the member AND adding a Designator at the same time.	**Advanced To** radio button. **(Element Code 01)**
Adding a Designator	**Add Designator** radio button. **(Element Code 45)**

Complete the Select Job Info fields as follows:

Field	Action
Job Code	Key in the 6-digit job code for the new rate/rank or click the lookup button (magnifying glass icon) to search for and select the new job code. If member is being advanced, then enter the rate the member is being advanced to (Example: If member is a SA and is being advanced to SN, then enter 415096). If member is being advanced **and** adding a designator then enter the new rate with designator (Example: Enter 410096 for SNBM if member is being advanced from SA). If adding a designator enter the assigned designator (i.e., if member is a SN and is being assigned a BM designator, then Job Code 410096 for SNBM would be entered). Designators may be assigned to: E-3 personnel above the servicewide cutoff. E-2/E-3 non-advancing personnel completing class "A" training. E-2/E-3 personnel previously reduced to pay grade E-1. **Note:** Do not assign designators to rated personnel.
Date of Rank/Effdt	Enter the date the advancement or designator assignment is effective. Use MM/DD/YYYY format or click the lookup button (calendar page icon) to select a date. *Note: Per 5.C.28.C of the Personnel Manual, COMDTINST M1000.6 (series), a member may not be advanced retroactively, advancements are considered retroactive after 30 days have elapsed since the requested date of advancement.*
Sal Admin Plan/Salary Grade	No action required. These fields will be populated by the system based on the Job Code you selected.

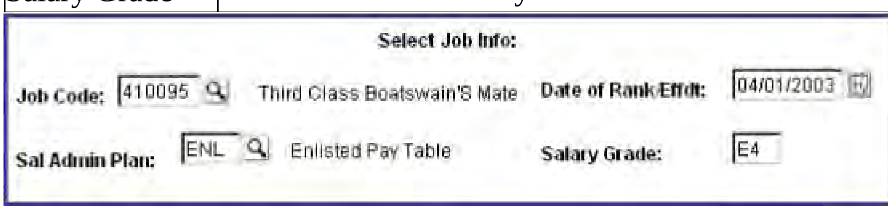


Continued on next page

Advancement/Change in Rating/Adding a Designator, Continued

Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5
(con’t)</td><td>When Changing a members rating, complete the Action Reason field by selecting the Change in Rating radio button.


Complete the Select Job Info fields as follows:
<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Job Code</td><td>Key in the 6-digit job code for the new rating or click the lookup button (magnifying glass icon) to search for and select the new job code.</td></tr>
<tr><td>Date of Rank/Effdt</td><td>Enter the date the change in rating is effective. Use MM/DD/YYYY format or click the lookup button (calendar page icon) to select a date.</td></tr>
<tr><td>Sal Admin Plan
Salary Grade</td><td>No action required. These fields will be populated by the system based on the Job Code you selected.</td></tr>
</table>


</td></tr>
<tr><td>6</td><td>Click the Save button to complete the transaction.</td></tr>
</table>

Deleting an Advance/ Promote One Member Transaction

Access to this page is limited to users at PSC. If you need to reverse a transaction after you have saved the "Advance/Promote One Member" page, contact PSC (ADV) branch, via e-mail to: psc-dg-ADV@uscg.mil, or by phone at (785) 339-3400.

Reduction/Removal of Designator

Introduction

This section provides the procedures to Reduce a member or Remove a Designator in Direct-Access.

Advance/ Promote One Member

When to use: The advance/Promote One Member page is used to complete the necessary transactions on a member for:

- Reduction in rate (use the Disciplinary Action page for reductions awarded as the result of NJP or Courts-Martial), or
- Removal of Designator

When not to use:
Resumption of Enlisted/Warrant status upon termination as a temporary officer. Officers authorized to resume their permanent grade or rate must be discharge and re-accessed (rehired at their permanent grade or rate. Follow procedures in Chapter 8 (Discharge to Enlistment/Accession) of the DA Guide for Accessions

Pay and Personnel Systems Updates

Direct Access: The Advance/Promote 1 Member Page inserts a new row in the member's job data page (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) and updates the Job Data on the Career Information Tab of the CG Member Information Page (Develop Workforce > Plan Careers > Use > CG Member Info).

JUMPS: The Advance/Promote 1 Member Page generates a JUMPS P555 transaction with one of the following element codes:

- 23 -- if the **Reduced To** radio button was selected.
- 34 -- if the **Change in Rating** radio button is selected.
- Updates information on page 1 (General Information) of the PMIS screens in the PMIS Data Base.
- Sets fixed data fields on segment 00 of the pay file in JUMPS.
- Updates segments 01, 58 and any other pay and allowances segments that have to be changed due to advancement.

VERY IMPORTANT: If member is receiving SRB, Overseas Housing Allowance (OHA) at the time of advancement, then an OHA transaction must be done to change the OHA status. Also, if member is in inadequate quarters, an Inadequate Quarters transaction must be completed to show the new rental charge for Inadequate Quarters.

Continued on next page

Reduction/Removal of Designator, Continued

References

The following references contain information about advancements, reductions, designators and rating changes.

a. Personnel and Pay Procedures Manual, PSCINST M1000.2 (series)
b. Pay Manual, COMDTINST M7220.29 (series)
c. Personnel Manual, COMDTINST M1000.6 (series)
d. Enlisted Qualifications Codes Manual, COMDTINST M1414.9 (series)
e. Training and Education Manual, COMDTINST M1500.10 (series)

Other Transactions which may be required.

The following transactions may also be required when a member's pay grade changes:

Overseas Housing Allowance: If member is receiving Overseas Housing Allowance (OHA) at the time of advancement/reduction, then an OHA transaction must also be completed to show a change in the member's OHA status.

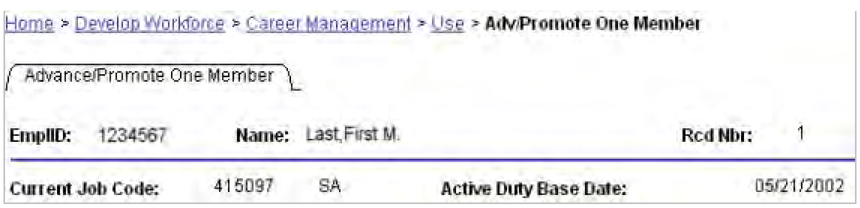
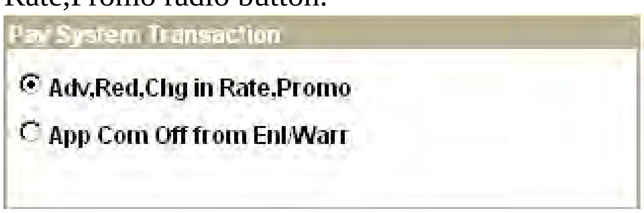
Inadequate Quarters Rental Charge: If the member is in inadequate quarters, then an Inadequate Quarters transaction must be completed to show the new rental charge for Inadequate Quarters

Continued on next page

Reduction/Removal of Designator, Continued

Procedure

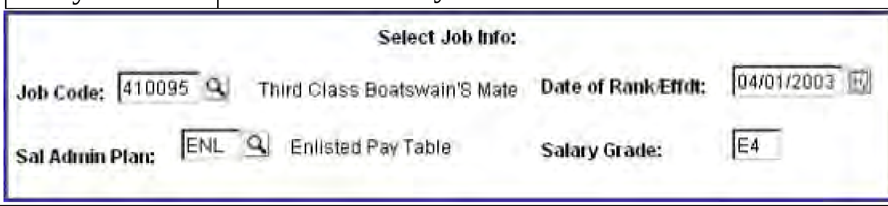
Log onto Direct Access and follow these steps to reduce a member or remove a designator.

Step	Action
1	Select menu items in the following order to access the Advance/Promote 1 Member page: ***Develop Workforce > Career Management > Use > Adv/Promote One Member***
2	A search page will appear. Enter the member's employee ID number or other search criteria and click the Search button to select the member you wish to display. Note: When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.
3	The Advance/Promote 1 Member page will display. Verify the member's employee ID and name to ensure you have selected the correct record from the search results. Ensure the Current Job Code and description match the member's pay grade/rating. 
4	Complete the Pay System Transaction field by selecting the ADV,Red,Chg in Rate,Promo radio button. 

Continued on next page

Reduction/Removal of Designator, Continued

Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>When Reducing a member or Removing a Designator, complete the Action Reason field by selecting the Reduced To radio button for reductions or Change in Rating radio button for designator removals.
Complete the Select Job Info field as follows:
<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Job Code</td><td>Key in the 6-digit job code for the new rating or click the lookup button (magnifying glass icon) to search for and select the new job code.</td></tr>
<tr><td>Date of Rank/Effdt</td><td>Enter the date the change in rating is effective. Use MM/DD/YYYY format or click the lookup button (calendar page icon) to select a date.</td></tr>
<tr><td>Sal Admin Plan
Salary Grade</td><td>No action required. These fields will be populated by the system based on the Job Code you selected.</td></tr>
</table>


</td></tr>
<tr><td>6</td><td>Click the Save button to complete the transaction.</td></tr>
</table>

Reversing a Reduction/ Removal of Designator Transaction

Access to this page is limited to users at PSC. If you need to reverse a transaction after you have saved the "Advance/Promote One Member" page, contact PSC (ADV) branch, via e-mail to: psc-dg-ADV@uscg.mil, or by phone at (785) 339-3400.

CWO Appointment (CGPC only)

Introduction

CGPC (opm/rpm) inputs all CWO Appointment transactions to effect appointment to CWO. This section provides the procedures for CGPC (OPM) to enter an appointment to CWO in Direct Access. SPO/HRS staffs are not permitted to enter these transactions.

Advance Promote One Member

When to use:

- Chief Warrant Officer Appointment.
- Reduction in rate (use the Disciplinary Actions page for reductions awarded as the result of NJP or Courts-Martial).

When not to use:

Resumption of Enlisted/Warrant status upon termination as a temporary officer. Officers authorized to resume their permanent grade or rate must be discharged and re-accessed (rehired at their permanent grade or rate. Follow procedures in Chapter 8 (Discharge to Enlistment/Accession) of the DA Guide for Accessions (http://www.uscg.mil/hq/cgl/psc/guides/accession.pdf).

References

a. Personnel and Pay Procedures Manual, PSCINST M1000.2 (series)
b. Pay Manual, COMDTINST M7220.29 (series)
c. Personnel Manual, COMDTINST M1000.6 (series)

Other Transactions which may be required.

The following transactions may also be required when a member's pay grade changes, these are input by the officer's servicing SPO/HRS site.

Overseas Housing Allowance: If member is receiving Overseas Housing Allowance (OHA) at the time of appointment, then an OHA transaction must also be completed to show a change in the member's OHA status.

***Inadequate Quarters Rental Charge*:** If the member is in inadequate quarters, then an Inadequate Quarters transaction must be completed to show the new rental charge for Inadequate Quarters.

Continued on next page

CWO Appointment (CGPC only), Continued

Other Transactions which may be required. (continued)

Officer Uniform Allowance Claim:

- **Active Duty Appointments**: An Officer Uniform Allowance Claim is not required. The allowance will by paid by the system when the appointment transaction process.

Reserve Appointments: The officer's servicing SPO/HRS site needs to generate the Officer Uniform Allowance Claim through Direct Access once the Reserve Officer meets the requirements of section 3.K.2.a, CG Pay Manual, COMDTINST M7220.29(series). Use Uniform Claim Code B (not D).

Direct Access Updates

The Advance/Promote 1 Member Page inserts a new row in the member's job data page (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) and updates the Job Data on the Career Information Tab of the CG Member Information Page (Develop Workforce > Plan Careers > Use > CG Member Info).

How JUMPS is effected by the Advance/ Promote 1 Member Page

The Advance/Promote 1 Member Page creates the following JUMPS transactions:

H300 Appointed Officer From Enlisted Status
P203 Discharged (dated day prior to CWO appointment)

Before you Begin

CWO appointments are input by CGPC (OPM) only. Do not use this procedure to record Resumption of Enlisted/Warrant status upon termination as a temporary officer. Officers authorized to resume their permanent grade or rate must be discharge and re-accessed (rehired at their permanent grade or rate. Follow procedures in Chapter 8 (Discharge to Enlistment/Accession) of the DA Guide for Accessions (http://www.uscg.mil/hq/cg1/psc/guides/accessions.pdf

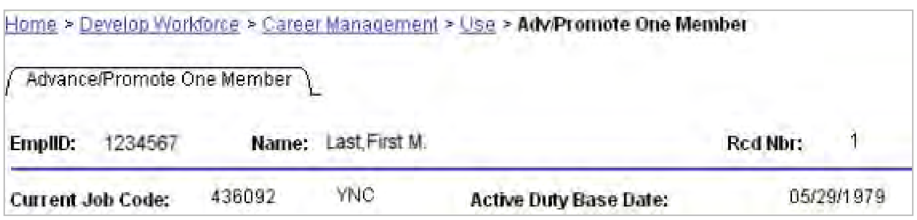
Continued on next page

CWO Appointment (CGPC only), Continued

Procedures Log into Direct Access and follow these steps to promote a member to warrant officer.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order to access the Advance/Promote 1 Member page: Develop Workforce > Career Management > Use > Adv/Promote One Member</td></tr>
<tr><td>2</td><td>A search page will appear. Enter the member's employee ID number or other search criteria and click the Search button to select the member you wish to display.

Note: When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.</td></tr>
<tr><td>3</td><td>The Advance/Promote 1 Member page will display. Verify the member's employee ID and name to ensure you have selected the correct record from the search results. Ensure the Current Job Code and description match the member's pay grade/rating.

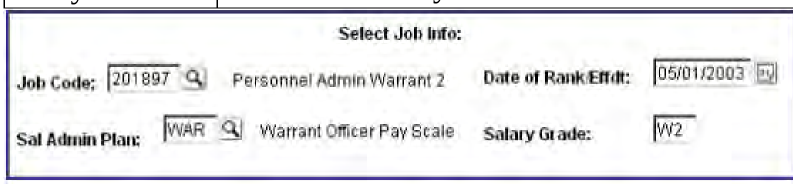

</td></tr>
<tr><td>4</td><td>Complete the Pay System Transaction field by selecting the App Com Off from Enl/Warr radio button.

</td></tr>
</table>

Continued on next page

CWO Appointment (CGPC only), Continued

Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Complete the Select Job Info fields as follows:
<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Job Code</td><td>Key in the 6-digit job code for the new rank or click the lookup button (magnifying glass icon) to search for and select the new job code..</td></tr>
<tr><td>Date of Rank/Effdt</td><td>Enter the date the promotion is effective. Use MM/DD/YYYY format or click the lookup button (calendar page icon) to select a date.</td></tr>
</table>
<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Sal Admin Plan</td><td rowspan="2">No action required. These fields will be populated by the system based on the Job Code you selected.</td></tr>
<tr><td>Salary Grade</td></tr>
</table>


</td></tr>
<tr><td>6</td><td>Complete the Career Information Row as follows (Note: If this is the first advancement/ designator transaction for this member completed in PeopleSoft the page will open with a new blank row). Click the add row button (plus sign) to create a new blank row if necessary.
<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Job Code</td><td>Key in the 6-digit job code for the new rate/rank or click the lookup button (magnifying glass icon) to search for and select the new job code. <u>Use the same code as entered in step 6 above</u>.</td></tr>
<tr><td>Rank Status</td><td>Click the drop-down arrow and select Perm (meaning Permanent) from the list.</td></tr>
<tr><td>Promo Stat</td><td>Select the Promotion Status from the drop-down list</td></tr>
<tr><td>Initial Source</td><td>Lookup and select the Initial Source code</td></tr>
<tr><td>Yr Grp</td><td>Enter the year (YYYYY) for the officer's year group</td></tr>
<tr><td>Commissioned</td><td>Enter the date commissioned (MM/DD/YYYY)</td></tr>
<tr><td>Category</td><td>Lookup and select the Category code</td></tr>
<tr><td>Source</td><td>Lookup and select the Source code</td></tr>
<tr><td>Signal</td><td>Signal number</td></tr>
</table>


</td></tr>
<tr><td>7</td><td>Click the save button to complete the transaction.</td></tr>
</table>

Continued on next page

CWO Appointment (CGPC only), Continued

Deleting an Advance/ Promote One Member Transaction	Access to this page is limited to users at PSC. If you need to reverse a transaction after you have saved the "Advance/Promote One Member" page, contact PSC (ADV) branch, via e-mail to: psc-dg-ADV@uscg.mil, or by phone at (785) 339-3400.

School/Recruit Training Advancements

Introduction

This section will guide you through the process of creating and processing "A" School and Recruit Training advancement boards in PeopleSoft.

Access to these pages is limited to SPO/HRS role users at Training Centers. The following user roles must be added to the user's account in addition to the CGHRS role:
- CGCRMGNP - (Base Level Career Management Role);
- CGCRMGBD - (Board User/Promotions Advancements Career Management Role);
- ASH - (School Based Advancements Career Management Role).

When to use:
The Maintain Boards and Panels pages are used to complete the necessary transactions for a group of members completing Recruit training or a Class "A" school on the same date and advancing, changing ratings or receiving designators.

When not to use:
- Members who are being advanced by the Enlisted Personnel
- Advancement Authorizations (EPAA) or Headquarters Reserve
- Advancement Authorizations (HRAA).

Pay and Personnel Systems Updates

Direct Access: The Post Board Activities Page inserts a new row in the member's job data page (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) and updates the Job Data on the Career Information Tab of the CG Member Information Page (Develop Workforce > Plan Careers > Use > CG Member Info).

JUMPS: The Post Board Activities Page generates a JUMPS P555 transaction with one of the following element codes:

- 01 -- if the Advance To drop-down was selected
- 23 -- if the Reduced To drop-down was selcted
- 34 -- if the Change Rating drop-down was selected
- 45 -- if the Add Designator drop-down was selected.
- Updates information on page 1 (General Information) of the PMIS screens in the PMIS Data Base.
- Sets fixed data fields on segment 00 of the pay file in JUMPS.
- Updates segments 01, 58 and any other pay and allowances segments that have to be changed due to advancement.

Continued on next page

School/Recruit Training Advancements, Continued

Pay and Personnel Systems Updates (continued)

VERY IMPORTANT: If member is receiving Overseas Housing Allowance (OHA) at the time of advancement, then an OHA transaction must be done to change the OHA status. Also, if member is in inadequate quarters, an Inadequate Quarters transaction must be completed to show the new rental charge for Inadequate Quarters.

References

The following references contain information about advancements, reductions, designators and rating changes.

a. Personnel and Pay Procedures Manual, PSCINST M1000.2 (series)
b. Pay Manual, COMDTINST M7220.29 (series)
c. Personnel Manual, COMDTINST M1000.6 (series)
d. Enlisted Qualifications Codes Manual, COMDTINST M1414.9 (series)
e. Training and Education Manual, COMDTINST M1500.10 (series)

Other Transactions which may be required.

The following transactions may also be required when a member's pay grade changes.

Overseas housing allowance:
If member is receiving Overseas Housing Allowance (OHA) at the time of advancement/reduction, then an OHA transaction must also be completed to show a change in the member's OHA status.

Inadequate Quarters Rental Charge:
If the member is in inadequate quarters, then an Inadequate Quarters transaction must be completed to show the new rental charge for Inadequate Quarters

Before you Begin

If possible, have the Board Type Code. Recruit Training boards will be created with the code RECTRN, and in general, "A" School board names types consist of the rating followed by "_A". However, if you do not know the Board Type Code value, you may perform a lookup as follows and select the code from the available list returned.

Continued on next page

School/Recruit Training Advancements, Continued

Procedure

Log into Direct Access and follow these steps to advance a member or add a designator.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

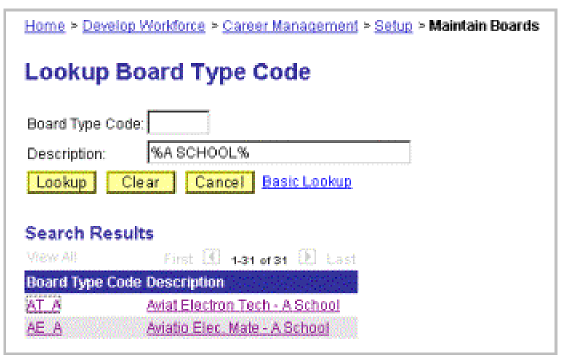
Select from the home menu bar ***Develop Workforce>, Career Management>, Setup>,*** and ***Maintain Boards***.

- Alternate path: Select from the home menu bar Develop Workforce>, Career Management>, Setup>, and Board/Panel Setup Home. Select the ***Maintain Boards and Panels*** link.

Enter a Board Type Code, Sequence Number, or Active Duty Reserve Indicator and press the ***Search*** button. Select the Board Type Code from the available list.

Note: For each new class session, you must press the ***Add a New Value*** link to generate a new instance of that board type. Enter the Board Type Code or use the lookup and enter the description ***%A Schoool%*** then press ***Search***. Select the correct A School from the available list. Enter ***Active Duty*** for the Active Duty Reserve Indicator. Once all the values are complete, press the ***Add*** button. On the new page, you will enter the data and press the ***Save*** button. The Sequence Number is updated automatically when the page is saved.

Sample graphic of lookup for Board Type Code:

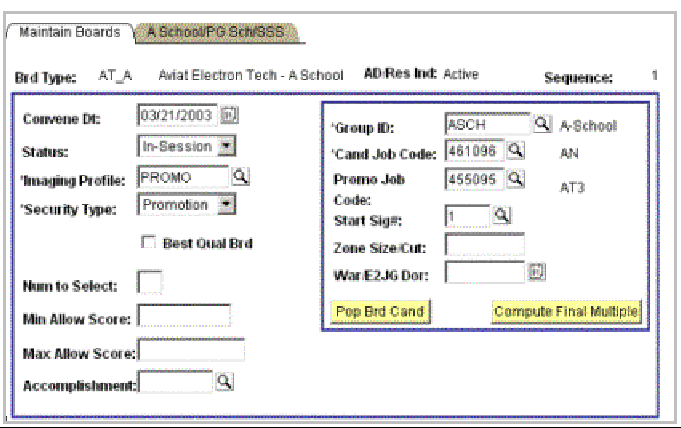


</td></tr>
</table>

Continued on next page

School/Recruit Training Advancements, Continued

Procedure (continued)

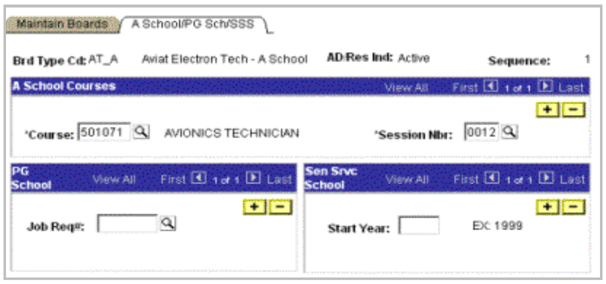
Step	Action
2	On the "Maintain Boards" page, complete the fields as follows: • Enter the Graduation Date of the “A” School or Recruit Training Class. • Set the Status to ***'In-Session'***. • Select ***'PROMO'*** for the Imaging Profile. • Select ***'A School'*** for the Security Type • Select ***'ASCH'*** for the Group ID. • The Cand Job Code should be the *primary* jobcode of the members who are completing "A" School or Recruit Training (The most common values will be: 461096 Airman, 432096 Fireman, 415096 Seaman, or 415098 Seaman Recruit). If graduating personnel have multiple jobcodes for that school session, you should select the jobcode held by the majority of the class. • The Promo Jobcode should be the jobcode that class will be advanced to. Use the magnifying glass to look-up the appropriate jobcode. • Enter a ***1*** for the Start Sig#. This number does not pertain to "A" School advancements but it must still be entered for the page to function properly. Sample graphic: 

Continued on next page

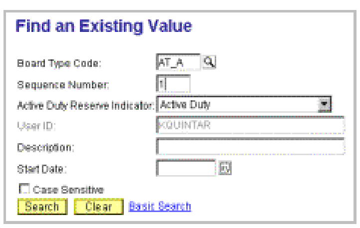
School/Recruit Training Advancements, Continued

Procedure (continued)

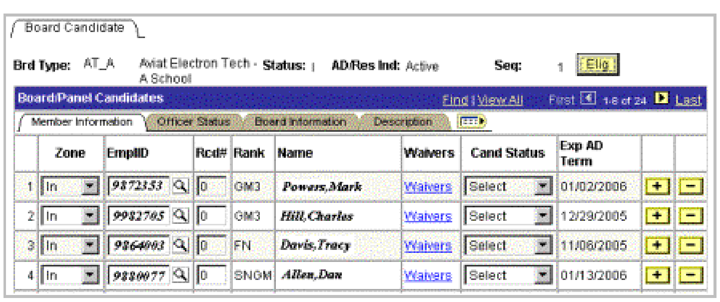
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
In order to prepare to automatically populate the board with candidates for advancement, click the A School/PG Sch/SSS tab. Enter the Course number and Session Number for the "A" School. (Recruit Training Classes must be populated manually until such time as a member’s course session data is available in PeopleSoft). Press the Save button.



Return to the "Maintain Boards" page by pressing the Maintain Boards tab. Press the Pop Brd Cand button. This will insert onto the board all the students who have completed that course and session.
</td></tr>
<tr><td>4</td><td>
To review the board candidates, select from the home menu bar Develop Workforce> Career Management>Use>Board Candidates. Look up the board that was created in Step 2.



The students who have completed the course session used to populate the board in the previous step should appear as candidates on the board.



</td></tr>
</table>

Continued on next page

School/Recruit Training Advancements, Continued

Procedure (continued)

Step	Action
4 (con't)	For "A" School candidates, no action should be required on this page. However, if you wish to manually add or delete candidates from the list (as is currently required for Recruit Training Classes), you may do so by pressing the ***Plus Symbol*** button. This will add a row and allow you to enter a candidate's information. Pressing the ***Minus Symbol*** button will allow you to delete a row. In order for the candidate to be processed for advancement, the candidate must be saved with a **Cand Status** of **"Select".** Press the ***Save*** button when all changes, additions, and deletions are complete. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
5	Select from the home menu bar ***Develop Workforce>, Career Management>, Use>,*** and ***Post Board Activities***. Select the List ID (A-School Advancements), Effective Date (01/01/2003), and the Active Duty Reserve Indicator ("Active Duty" or "Reserve – Active Component" as Appropriate). Press ***Search*** and select from the list returned. (sample of list options shown below) Sample of Post Board Activities search for board set up in Step 2:

Continued on next page

School/Recruit Training Advancements, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>
This takes you to the "Post Board Activities" page. In order to bring up your list of candidates, you must enter a Board Type Code and a Sequence Number. In the above example, you would enter "AT_" and Sequence Number of "1". Press the Populate A School button. This pulls all selected candidates from the board session. Verify the jobcode for each member as members receiving designators will require changes to this field.
Enter the Date of Rank (DOR) for the advancement and press the Select All button. This will populate the Rank/Contract date field for each member. You may override the DOR at the individual member level simply by typing in a new DOR.

<table>
<tr><th>Promo Job Code</th><th>Select #</th><th>Board Type Code</th><th>Convene Dt</th><th>Payroll Trans Type</th><th>Rank/Contract Begin</th><th>Contract End</th><th>Promote</th></tr>
<tr><td>455095</td><td></td><td>AT_A</td><td>01/01/2003</td><td>Advanced To</td><td>02/01/2003</td><td></td><td>☑</td></tr>
<tr><td>455095</td><td></td><td>AT_A</td><td>01/01/2003</td><td>Advanced To</td><td>02/01/2003</td><td></td><td>☑</td></tr>
<tr><td>455095</td><td></td><td>AT_A</td><td>01/01/2003</td><td>Advanced To</td><td>02/01/2003</td><td></td><td>☑</td></tr>
<tr><td>455095</td><td></td><td>AT_A</td><td>01/01/2003</td><td>Advanced To</td><td>02/01/2003</td><td></td><td>☑</td></tr>
<tr><td>455095</td><td></td><td>AT_A</td><td>01/01/2003</td><td>Advanced To</td><td>02/01/2003</td><td></td><td>☑</td></tr>
<tr><td>455095</td><td></td><td>AT_A</td><td>01/01/2003</td><td>Advanced To</td><td>02/01/2003</td><td></td><td>☑</td></tr>
</table>
</td></tr>
<tr><td>7</td><td>
The Promo Job Code will default to the Promo Jobcode entered on the "Maintain Boards" page from Step 2 above. You may override the Promo Jobcode at the individual member level simply by typing in a new jobcode.
The Payroll Trans Type will default to "Advanced To" but may be changed, if necessary. The values are Change in Rating, Reduced To, or Add Designator.
When you are satisfied that all information on the page is correct, press the Save button. The advancement transaction is created when the page is saved.
</td></tr>
<tr><td>8</td><td>
Note: If you need to reverse a transaction after you have saved the "Post Board Activities" page, contact PSC (ADV) branch, via e-mail to: psc-dg-ADV@uscg.mil, or by phone at (785) 339-3400
</td></tr>
<tr><td>9</td><td>
To repeat this function, select Return to Search. To perform another function, choose from the menu. To exit, press the Sign Out link located at the top of the page.
For additional information on the processes reviewed above, review the lessons entitled Maintain the Board, Board Candidates, and Advance/Promote Members from Board Candidates.
</td></tr>
</table>

Continued on next page

School/Recruit Training Advancements, Continued

Deleting a Maintain Boards and Panels Transaction

If you need to reverse a transaction after you have saved the "Post Board Activities" page, contact PSC (ADV) branch, via e-mail to: psc-dg-ADV@uscg.mil, or by phone at (785) 339-3400

Coast Guard Servicing Personnel Office Manual

Part III, General Transactions

Chapter 4, Dependency, Decedent Affairs, SGLI and Contact Information

Overview

Introduction

This section provides the procedures for Dependency, Decedent Affairs, SGLI and Contact Information

Contents

This chapter contains the following topics.

Topic	See Page
Employee Family Member and Beneficiary Information	III-4-3
Change Emergency Contacts (Non Self-Service)	III-4-19
Elections and Beneficiaries (SGLI & FSGLI Data Entry)	III-4-23
BAH/Dependency Data Form Print Procedures	III-4-33
BAH Dependency Data By Unit (Department)	III-4-37
Employee Address and Home of Record	III-4-45
Employee Marital Status, Address, Phone and Email Change	III-4-49
Emergency Contact Data By Unit (Department)	III-4-53
Print Emergency Contact Information By Employee ID	III-4-59
Recall Roster	III-4-63
Recall Roster By ISC/HRS	III-4-65
Divorce, Annulment or Death of Spouse	III-4-67
Questionable Dependent/PPC Legal Approval	III-4-77

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Employee Family Member and Beneficiary Information

Important Policy Change

Only BAH eligible dependents, as defined in Chapter 3-D of the U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), need to be listed on this page. Completion of the CG-2020D, Designation of Beneficiaries form eliminates the need to enter a member's designation of beneficiaries for:

- Death Gratuity
- Unpaid Pay and Allowances
- Person to Receive Allotment of Pay if Missing or Unable to Transmit Funds

Family members are not deleted from the member's record when their status changes. For example, if a member reports a divorce, you would change the spouse's relationship to "Ex-Spouse" and **de-select the BAH Eligible** box on Personal Profile page. Also, it is not necessary to delete persons from this page who were previously only added for beneficiary designation purposes. Only BAH eligible family members will appear on the printed BAH/Dependency form.

Introduction

This section provides procedures to enter or update a member's beneficiary or family member (dependent) information in PeopleSoft.

Family members, and others the member wishes to designate, must be added using this process before they can be listed as beneficiaries for Dependent SGLI, Unpaid Pay & Allowances, Death Gratuity, or as a Person to Receive an Allotment of Pay (if member is missing or unable to transmit funds). See Elections and Beneficiaries to enter SGLI elections.

For SGLI elections, the beneficiaries' information may be left blank. SGLI beneficiary designations are made by the member on form SGLV-8286 and do not need to be duplicated in PeopleSoft to be valid. In PeopleSoft, we are primarily concerned with capturing the member's coverage election so the appropriate payroll transactions can be initiated.

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Introduction (con't)

This process is also used to add/or change the status of BAH Eligible Family members. **Family members are not deleted from the member's record when their status changes**. For example, if a member reports a divorce, you would change the spouse's relationship to "Ex-Spouse" and de-select the BAH Eligible box on Personal Profile page (Be sure to stop the member's FSGLI deduction as well if the member is divorced or the member's spouse dies and the member was participating in the program. Go to Elections and Beneficiaries, locate the FSGI plan type (25 - Dependent Life), insert a new row and enter "0" to stop coverage.)

See: Divorce, Annulment or Death of a Spouse for more information and procedures.

Note: If recording a marriage, divorce or death of a spouse, be sure to update the member's marital status on the Personal Data page.

After the data is entered and saved it can be printed on a BAH/Dependency Form (CG-2020D). See for more BAH Dependency Form Print Procedure for more information.

Before you Begin.

Before adding a BAH Eligible Family Member you should consult Chapter 3-D and Figure 3-8, of the Coast Guard Pay Manual, COMDTINST M7220.29(series) for guidance on dependency approval.

Continued on next page

Employee Family Member and Beneficiary Information, Continued

Additional steps for Reserve Component Members

If the member is a Reservist who has completed 20 years satisfactory service, then the Reservist needs to take the following action:

If the Reservist	Then Reservist may	Action to take
Had no spouse or children upon completion of 20 years satisfactory service	Elect RCSBP coverage for a new spouse / child	Complete Form CG-11221. Form must be completed within one year of obtaining a spouse and/or child. A copy of the CG-11221 must be filed in the SPO PDR. The original CG-11221, along with marriage / birth certificate(s), must be sent to PPC (RAS).
Elected RCSBP coverage upon completion of 20 years satisfactory service, then: • Divorced the spouse, or • The spouse died, and • The reservist remarries or acquires a child	Elect or decline RCSBP coverage for the new spouse/child	In all cases of remarriage, the reservist must complete a new Form CG-11221 to elect or decline RCSBP coverage. The form must be completed within one year of remarriage, and must contain the spouse's signature. Section VII of the Form shall be annotated to reflect a change to the original 20-year RCSBP election. A copy of the CG-11221 must be filed in the SPO PDR. The original new CG-11221, divorce/death certificate, and marriage / birth certificate(s) must be sent to PPC (RAS).

Continued on next page

Employee Family Member and Beneficiary Information, Continued

Required Supporting Legal Documentation

The following legal supporting documents are required when adding BAH-Eligible dependents:

- Birth Certificate(s) for dependent child(ren)
- Marriage Certificate (for dependent spouse)
- Any additional documentation which may be required when adding dependents requiring PPC approval. See Questionable Dependents on page III-4-77 for more information and procedures.

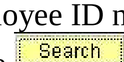
Pages and Tabs

Processing family member/beneficiary information consists of one page and three tabs.

The **Name** tab enables you to record the family member or beneficiary name and relationship to the member. You must use the Name tab to add dependent/beneficiary records.
The **Address** tab enables you to record the family member or beneficiary address information.
The **Personal Profile** tab enables you to record BAH eligibility, birth date and other personal information about the family member or beneficiary.

Procedure

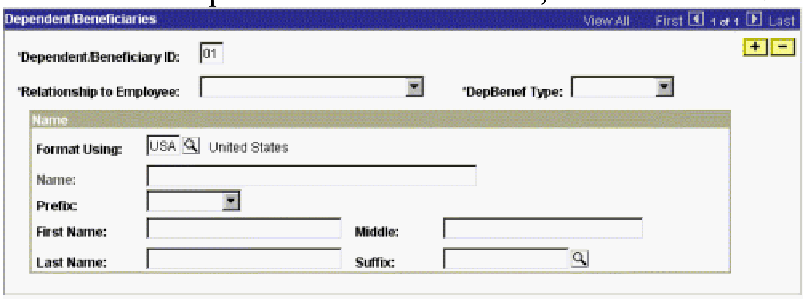
Log into Direct Access and follow these steps to add, remove or change employee family member and beneficiary information.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Compensate Employees > Administer Base Benefits > **Use Dependent/Beneficiary**
2	A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedure **(continued)**

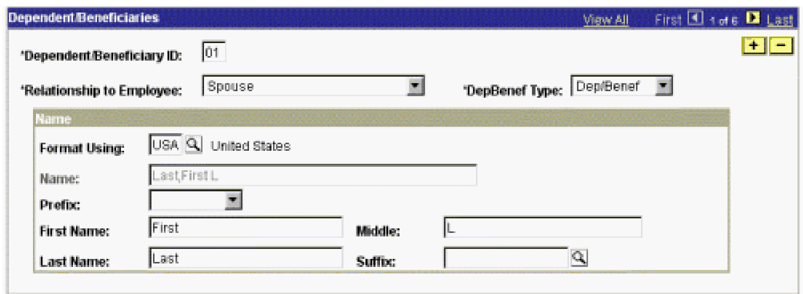
Step	Action
3	The Dependent/Beneficiary Name tab will be displayed. If the member does not have any family members or beneficiaries in the system, the Name tab will open with a new blank row, as shown below.  If you are adding a new family member or beneficiary, you may complete the fields as indicated below. **Note: If adding a spouse or entering a divorce be sure to update the member's marital status on the Personal Data page and update SGLI/FSGL Elections on the Elections and Beneficiaries page as well.**

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

Step	Action
3 (con't)	If the member already has family members or beneficiaries in the system, the Name tab will display the information on Dependent/Beneficiary ID 01 (the first family member/beneficiary in the member's record).



1. If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active.


. Click on the View All link, Next Arrow button, or the Last link to view additional family members or beneficiaries.
2. Click the + to add an additional family member or beneficiary, a new blank row will be inserted.

Name Tab Data Entry:

Field	Description/Instructions
Dependent/ Beneficiary ID	PeopleSoft pre-populates this field. It will automatically increment it by 1 for every new record added.
Relationship to Employee	Select a relationship from the drop-down menu. There are several pre-defined values to choose from: If entering a divorce change the Spouse's relationship to "ExSpouse". Adopt Daughter, Adopt Son, Aunt, Brother, Daughter, Employee, ExSpouse, Father, Father-in-Law, Former Spouse, Friend Grandchild, Grandfather, Grandmother, In Loco Parentis, Legal Guardian, Legal Ward Daughter, Legal Ward Son, Mother, Mother-in-Law, Neighbor, Nephew Niece, Other, Other Relative, Roommate, Sister, Son, Spouse, Step Parent, Stepchild, Trustee, Uncle

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

Step	Action	
	Field	**Description/Instructions**
3 (con't)		Some categories of dependents require PPC Legal approval: See Questionable Dependents for more information and procedures.
	Dependent/Ben Type	This field will automatically be filled in based on the type of relationship you selected above. You can change it if necessary: select a dependent/beneficiary type from the drop-down menu. Use: • **Benf** -- if this person is being added solely as a beneficiary (SGLI, Death Gratuity, etc) and not as a dependent/family member for BAH purposes. • **Dependent/Benf --** if this person is being added as a BAH eligible dependent/family member (Including spouses in member-to-member marriages). This type (Dependent/Ben) will also allow you to use list the person as a beneficiary for other programs. **You must set this field to "Dependent/Benf" and (on the Personal Profile tab) mark the BAH Eligible checkbox and provide the BAH eligible date if adding a BAH eligible family member.**

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

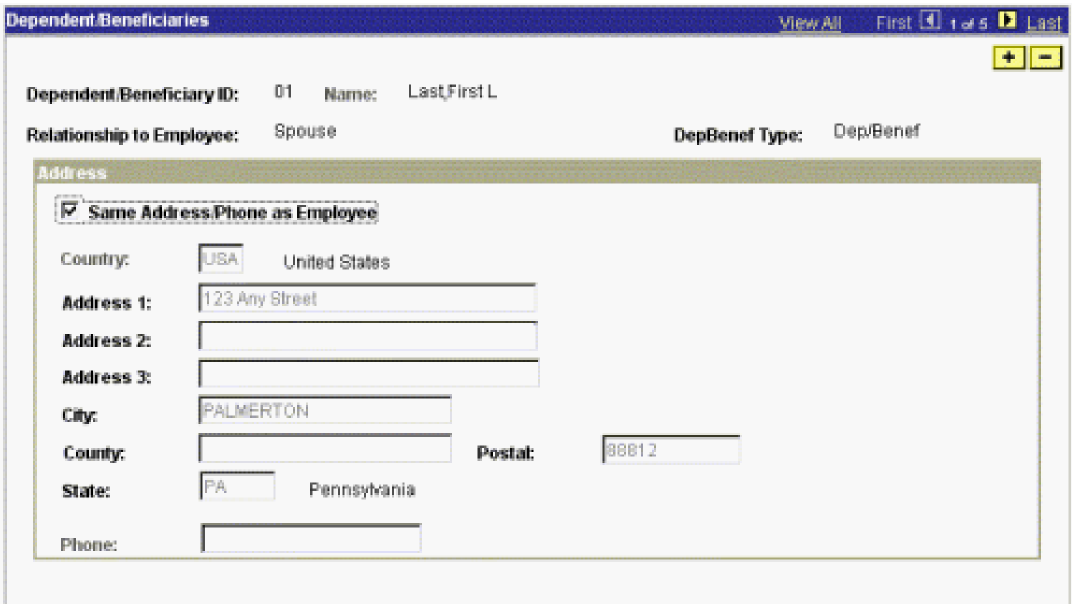
Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3 (con't)</td><td>
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Name</td><td>This field will be populated by PeopleSoft after you fill out the other name fields and save the page. It displays the Last Name, First Name, and Middle Initial or complete middle name of the family member/beneficiary.</td></tr>
<tr><td>Prefix</td><td>Optional. You may choose a prefix (Mr. Mrs, etc.) from the drop-down menu or leave this field blank.</td></tr>
<tr><td>First Name</td><td>Enter the person's first name</td></tr>
<tr><td>Last Name</td><td>Enter the person's last name</td></tr>
<tr><td>Middle</td><td>Enter the person's middle initial; optionally, you may enter the entire middle name if desired.</td></tr>
<tr><td>Suffix</td><td>If applicable, enter the suffix. Click icon to perform a lookup of valid values.
<table>
<tr><th>Name Suffix</th><th>Description</th></tr>
<tr><td>I</td><td>The First</td></tr>
<tr><td>II</td><td>The Second</td></tr>
<tr><td>III</td><td>The Third</td></tr>
<tr><td>IV</td><td>The Fourth</td></tr>
<tr><td>Jr</td><td>Junior</td></tr>
<tr><td>Sr</td><td>Senior</td></tr>
<tr><td>V</td><td>The Fifth</td></tr>
<tr><td>VI</td><td>The Sixth</td></tr>
<tr><td>VII</td><td>The Seventh</td></tr>
</table>
</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click the Address tab to view, update or change family member and beneficiary address information.


If you have just added or changed family member beneficiary information in the Name tab, the address data for that person will be displayed. If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active. 

. Click on the View All link, Next Arrow button, or the Last link to view additional family members or beneficiaries.</td></tr>
</table>

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(con't)</td><td>Address Tab Data Entry:
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Same Address/ Phone as Employee</td><td>Click this check box if applicable, the address data will automatically fill based on the member's address information that is already in the system. The phone information will not fill in, you will have to un-check the box in order to enter the family member's phone number. If any of this information is incorrect, it can be updated using one of these procedures:
Employee Address and Home of Record
Employee Home and Mailing Address Change
Un-check the box if the family member's or beneficiary's address is no longer the same as the member's.</td></tr>
<tr><td>Address 1
Address 2
Address 3</td><td>Use these fields to enter the street address, P O Box, apartment number, etc.</td></tr>
<tr><td>City</td><td>Enter the City</td></tr>
<tr><td>County</td><td>Not used for U. S. Addresses, enter if necessary for foreign addresses.</td></tr>
<tr><td>State</td><td>Enter the standard two-letter state abbreviation code. Click the icon to perform a lookup of codes if necessary.</td></tr>
<tr><td>Province</td><td>Not used for U. S. Addresses, enter if necessary for foreign addresses.</td></tr>
<tr><td>Postal</td><td>Enter the zip code for U. S, Addresses or postal code for foreign addresses.</td></tr>
<tr><td>Phone</td><td>Enter the Home Phone number of the family member/beneficiary.</td></tr>
</table></td></tr>
</table>

Continued on next page

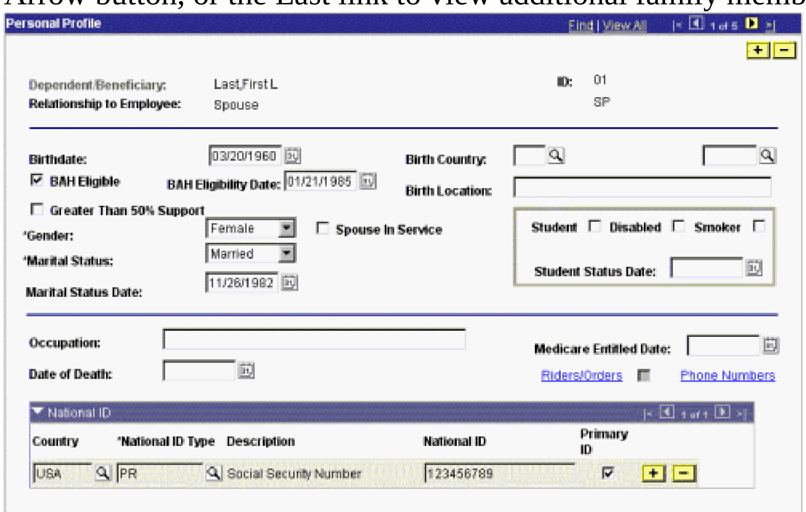
Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
Click the Personal Profile tab. This tab is used to designate BAH eligibility, provide Spouse-In-Service information, and record other personal information about the family member. All fields may be left blank or at the default values if you are only adding the person as a beneficiary and not as a family member/dependent. Be sure to check the "Spouse-in-Service" block when the member's spouse is in any branch or component of the military.

Note: The Gender value defaults to Male and the Martial Status defaults to Single, you may want changes these even in the case of a beneficiary only entry.

If you have just added or changed family member beneficiary information in the Name and address tabs, the data for that person will be displayed. If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active. 

. Click on the View All link, Next Arrow button, or the Last link to view additional family members or beneficiaries.


</td></tr>
</table>

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

Step	Action
5 (con't)	**Complete the fields as indicated below when adding family members/dependents.**

Field	Description/Instructions
Birth date	The family member's/dependent's date of birth. This field must be completed if the dependent type is "Dependent" or "Depnd/Benf" (BAH Eligible). You can leave this field blank if adding a beneficiary, but will receive a warning message when you attempt to save the data. You may dismiss the warning and proceed, the data will be saved. NOTE If you change a Spouse Birth date entry, you need to check to see if there is a Family SGLI/Dependent Life Plan Type 25, and if so, follow the procedure in the Correcting the Date of Birth for a Spouse guide to create a new Family SGLI election transaction so that the correct date of birth is transferred to JUMPS (Segment 32). JUMPS must be updated with the correct date of birth in order to properly compute FSGLI premium deductions.
Birth Country	The family member's/dependent's country of birth. Enter the standard three-letter country code (e.g. "USA" for United States of America). Click the icon to lookup valid codes if necessary.
State Province	The family member's/dependent's state or province (Field label will change depending on the country code entered.) of birth. Enter the standard two-letter abbreviation. Click the to lookup valid codes if necessary.
Birth Location	Enter the birth city.

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

Step	Field	Description/Instructions
5 (con't)	BAH Eligible	Click this checkbox if the member will be entitled to BAH with dependents for this family member. Also, click this checkbox even if the member's spouse, in a member-to-member marriage, is on active duty. The spouse in service block (see below) must be checked also. **Before adding a BAH Eligible Family Member consult Chapter 3-D of the Coast Guard Pay Manual, COMDTINST M7220.29(series).** If the person you are adding is a BAH eligible family member as outlined in the Coast Guard Pay Manual, then this box should be checked. If not a BAH eligible family member (i.e. a person being added for Emergency Data/SGLI information only), this box should not be checked. **Exception**: Check this block even if the spouse is an active duty service member. If entering a divorce remove the checkmark from this box. NOTE **You must mark the BAH Eligible checkbox, enter the BAH eligibility date below, and set the Dependent/Ben field on the first tab (Name) to "Dependent/Benf" if adding a BAH eligible family member.**
		Divorces: If entering a divorce remove the checkmark from this box for the spouse and any step children.
		Children, who are not incapacitated and are over age 21 or 23 (if full time student). Remove the checkmark from this box.

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5
(con't)</td><td>
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td></td><td>Some dependents require PPC Legal approval.

See Questionable Dependents for more information and procedures.</td></tr>
<tr><td>BAH Eligibility Date</td><td>If adding a BAH Eligible Family member, enter the date:
the member began support (e. g. Child's birth date)
dependency was approved by PPC (LGL)
of marriage
Note: If the date of marriage, child's date of birth, or dependency is prior to the member's accession date, then the date of accession should be used.

You must mark the BAH Eligible checkbox, enter the eligibility date, and set the Dependent/Ben field on the first tab (Name) to "Dependent/Ben" if adding a BAH eligible family member.</td></tr>
<tr><td>Greater than 50% Support</td><td>Click this checkbox only when the family member does not reside with the member and receives more than 50% of their support from the member.</td></tr>
<tr><td>Gender</td><td>Choose the family member's gender from the drop-down list.</td></tr>
<tr><td>Marital Status</td><td>Chose the family member's marital status from the drop-down list.
If entering a divorce, mark the spouse's martial status as "Divorced"</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

Step	Action	
5 (con't)	**Field**	**Description/Instructions**
	Marital Status Date	Enter the date corresponding to the martial status chosen above. May be left blank when the family member is single. Note: If adding a spouse, this is the date that will be shown as the Date of Marriage on the BAH Dependency Form **If entering a divorce, enter the date of final dissolution of marriage.**
	Spouse in Service/Branch of Service	Spouse in Service. Click the checkbox if this family member is the member's spouse and is in the service. When you click this checkbox, a new drop-down menu item will appear from which to choose the branch of service. You must also enter the spouse's SSN in the National ID information below. **The BAH Eligible checkbox (above) must also be marked even if the spouse is on active duty.**
	Student	Check this box when the family member is a child over age 21 but less than 23 attending school full time and is dependent of the member of over half of their support.
	Student Status Date	Enter the date the student status became effective.
	Disabled	Check this box when the family member is an incapacitated child over age 21
	Smoker	Not used, leave blank
	Occupation	Not used, leave blank
	Medicare Entitled Date	Not used, leave blank
	Riders/Orders	Not used
	Phone Numbers	Click this link to add additional contact phone numbers for the family member.
	National ID	This section is used to record the family member's Social Security Number (SSN). If the member's spouse is in the service, you must provide an SSN.

Continued on next page

Employee Family Member and Beneficiary Information,
Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5 (con't)</td><td>
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Country</td><td>Enter USA</td></tr>
<tr><td>National ID Type Description</td><td>Enter PR (for "Primary")</td></tr>
<tr><td>National ID</td><td>Enter the family member's SSN.</td></tr>
<tr><td>Primary ID</td><td>Check this box</td></tr>
</table>
</td></tr>
<tr><td>6</td><td>Click the Save button.
Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.
Click OK to proceed.</td></tr>
<tr><td>7</td><td>You may now exit the system by signing off or use the menu links to begin another transaction.</td></tr>
</table>

Change Emergency Contacts (Non Self-Service)

Introduction

This section provides the procedures for adding, updating and removing Emergency Contacts for members who do not have access to Direct-Access self-service.

Emergency Contacts are persons, the member designates, who are to be contacted in the event of an emergency. Any person entered as an emergency contact may be contacted in the event the "Primary" contact cannot be reached.

Emergency contact information will be printed on the Emergency Contact Information report. The report can be printed for an individual or for all members of a unit.

Procedure

Log into Direct Access and follow these steps to update Emergency Contact Information.

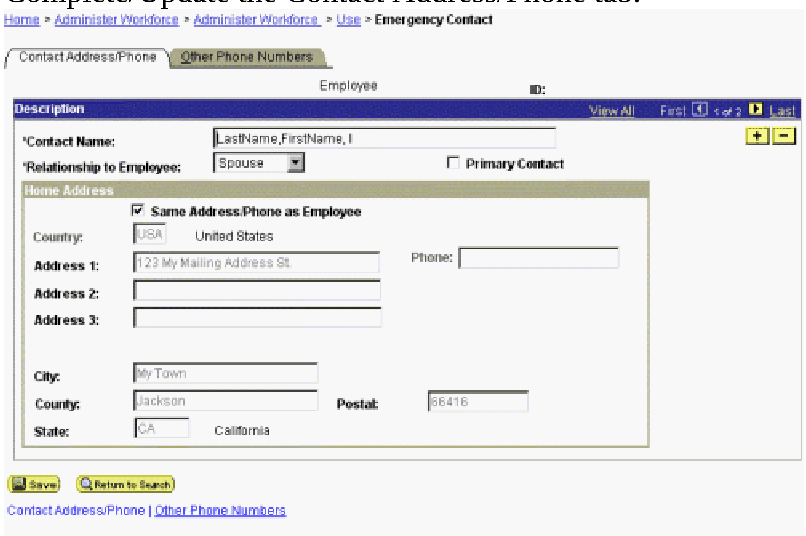
Step	Action
1	Select menu items in this order: Home>Administer Workforce>Administer Workforce>Use>**Emergency Contact**
2	A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
3	The Employee Emergency Contact page will display. There are two tabs on this page. 1. The Contact Address/Phone tab (displayed first) allows you to enter the Emergency Contact's name, relationship to the member and address. **Note: Please provide a physical address, not just a P.O. Box number. Personal notification cannot be made at a P.O. Box, a street address, including any building or apartment number is mandatory. Use address lines 2 & 3 to provide physical address information if Address line 1 is a P.O. Box or Route Number.** 2. The Other Phone Numbers tab allows you to enter the Emergency Contact's phone numbers.

Continued on next page

Change Emergency Contacts (Non Self-Service), Continued

Procedure **(continued)**

Step	Action
4	Complete/Update the Contact Address/Phone tab.



Field/Button or Link	Description/Instructions
	If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts.
	If you are adding an additional Emergency Contact, click this button to insert a new row
	If you are removing a Emergency Contact, click this button to delete the row. Note: If you delete the only Emergency Contact, the system will not allow you to save until you add a new one. At least one Emergency Contact entry is required.
Contact Name	Enter the Last Name followed by a comma (,) the first name followed by a comma <u>and a space</u> then the middle initial or middle name. Example: Smith,John J
Relationship to Employee	Click the drop-down menu for a list of relationship types. Click on a relationship type to select it.

Continued on next page

Change Emergency Contacts (Non Self-Service), Continued

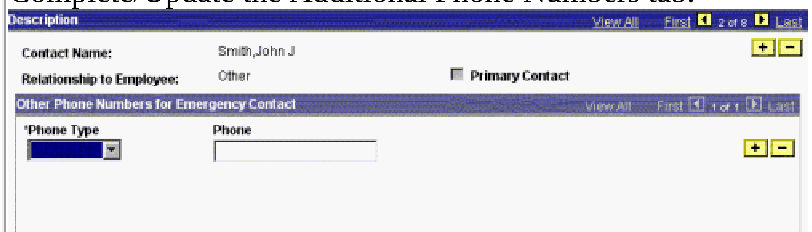
Procedure **(continued)**

Step	Action	
4 (con't)	**Field/Button or Link**	**Description/Instructions**
	Primary Contact (checkbox)	Check this box if this is the Primary Emergency Contact for this member. Only one Primary Contact is permitted.
	Same Address/Phone as Employee (checkbox)	Check this box if the Emergency Contact and member reside at the same address. The remainder of the address information will automatically be filled in.
	Country	Defaults to USA. Click the to lookup country codes for other countries if the Emergency Contact does not reside in the USA.
	Address(1 through 3)	Enter the physical address of the contact's residence (street, building number, apartment number, etc..) on these lines. **Note: Please provide a physical address, not just a P. O. Box number. Personal notifications cannot be made at a P. O. Box, a street address, including any building or apartment number is mandatory. Use Address lines 2 & 3 to provide physical address information if Address line 1 is a P. O. Box or Route Number.**
	Phone	Enter the primary daytime telephone number for the Emergency Contact. Additional phone number can be entered on the next tab.
	City/Province	This field will change from City to Province depending on the country selected. Enter the city or province Emergency Contact's mailing address.
	County	Not required. Enter the county if known
	Postal	Enter the Zip or Postal code.
	State	Enter the standard two-letter state abbreviate code. Click the to lookup codes if necessary.

Continued on next page

Change Emergency Contacts (Non Self-Service), Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the Other Phones Tab to enter additional phone numbers for this emergency contact or click the Save button if there are no additional phone numbers or Emergency Contacts to be added.</td></tr>
<tr><td>6</td><td>Complete/Update the Additional Phone Numbers tab.


<table>
<tr><th>Field/Button or Link</th><th>Description/Instructions</th></tr>
<tr><td>View All</td><td>If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts</td></tr>
<tr><td>+</td><td>If you are adding an additional Emergency Contact, Phone Number and a blank row is not already displayed, click this button to insert a new row</td></tr>
<tr><td>−</td><td>If you are removing a Emergency Contact phone, click this button to delete the row.</td></tr>
<tr><td>Phone Type (drop-down menu)</td><td>Click the drop-down menu for a list of phone types. Click on a phone type to select it.</td></tr>
<tr><td>Phone</td><td>Enter the phone number, area code first.</td></tr>
</table></td></tr>
<tr><td>7</td><td>Click the Contact Address Phone Tab to enter additional Emergency contacts or click the Save button if there are no additional phone numbers or Emergency Contacts to be added.
Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.
You may now exit the application (sign off) or choose another item from the menu links.</td></tr>
</table>

Elections and Beneficiaries

Introduction

This section provides the procedures for entering a member's SGLI and Dependent SGLI elections. Procedures for entering a member's designation of Beneficiaries for Death Gratuity, Missing and Unable to Transfer Funds, and Unpaid Pay and Allowances are also provided.

After the data is entered and saved, PeopleSoft will generate JUMPS transactions to start or stop deductions from the member's pay for SGLI premiums.

Dependent data can be printed on a BAH/Dependency report (old CG-41701A). See for more CG-4170A Print Procedure for more information.

SGLI Coverage

SGLI coverage is available in $50,000 increments with a minimum coverage amount of $50,000. The member may elect zero coverage or a coverage level less than the maximum of $400,000, in increments of $50,000. The following premiums apply at each coverage level: Coverage Level Monthly Premium DA/JUMPS Election Code:

Coverage Level	Monthly Premium 1 July 2008	Code
$50,000	$3.25	5
$100,000	$6.50	A
$150,000	$9.75	F
$200,000	$13.00	K
$250,000	$16.25	P
$300,000	$19.50	Q
$350,000	$22.75	R
$400,000	$26.00	S
$0 (Declined)	0	0
$0 (Admin. stop)	0	Y (PPC use only)

Continued on next page

Elections and Beneficiaries, Continued

Important Policy Change

The CG-2020D, Designation of Beneficiaries form eliminates the need to enter a member's designation of beneficiaries for:

1. Death Gratuity
2. Unpaid Pay and Allowances
3. Person to Receive Allotment of Pay if Missing or Unable to Transmit Funds

The Elections and Beneficiaries page only needs to be updated when a member changes his or her Servicemembers' Group Life Insurance (SGLI) or Family SGLI **election** (member increases, decreases, reinstates or declines coverage). **If the member is changing SGLI beneficiaries and not electing a new coverage amount, no data entry is required**.

Before You Begin:

Before you can enter beneficiary designations (other than SGLI) the beneficiary must be added to the member's record. See Employee Family Member and Beneficiary Information for the procedure. **For SGLI elections, the beneficiaries' information may be left blank.** SGLI beneficiary designations are made by the member on form SGLV-8286 and do not need to be duplicated in PeopleSoft to be valid. In PeopleSoft, we are primarily concerned with capturing the member's coverage election so the appropriate payroll transactions can be initiated. **However, you must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage. The marriage certificate is required legal supporting documentation for SGLI-Family entries.**

Effective Dates

You cannot "Future Date" or "Back Date" SGLI elections. Always enter the current date in the **Coverage begin date** and **Deduction begin** date fields. Use the **Election Date** field to record the date the member made the SGLI election.

Continued on next page

Elections and Beneficiaries, Continued

Effective Dates (con't)

Elections to reduce or decline SGLI or Family SGLI coverage are effective the first of the month, following the month the data is entered.

Exceptions:

1. If the data is entered on the first day of the month, then it is effective for that month.
2. If the data is entered between 2 and 20 September 2005, then it is effective 1 September 2005.

Therefore:

- An election to reduce or decline SGLI or Family SGLI that is entered on the second or subsequent day of any month (other than September 2005 but before the 21st) will be effective on the first on the following month. Coverage at the new level or no coverage (if the member elected to decline coverage) is in effect on the first of the following month. Corresponding premium withholding amounts will be effective in the member's mid-month pay.

  Example: A member's SGLI election to reduce coverage from $400K to $200K is input on 10 October. The member will be covered at the $400K level for the month of October and the member will be charged the full monthly premium for $400K coverage. The cost will be deducted from the member's mid-month and end-month pay for October. On 1 November the member's coverage decreases to the new $200k election. Premiums will be withheld at the rate for the $200K coverage level from the member's mid-month and end-month November pay and each month thereafter until a new election is submitted.

Continued on next page

Elections and Beneficiaries, Continued

Effective Dates (con't)

Elections to start or increase coverage are effective on the first day of the month when the data is entered.

Therefore:

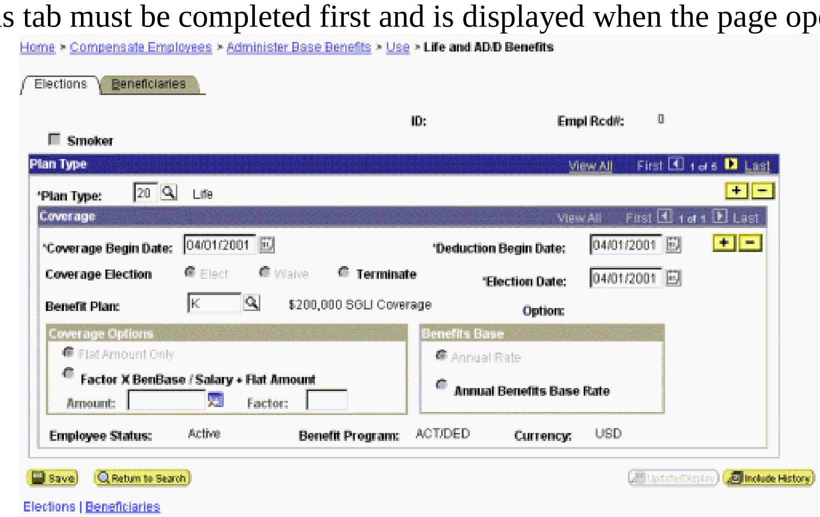
- An election to start or increase SGLI or Family SGLI that is entered on any day of any month will be effective on the first that month. Coverage at the new level is in effect on the for the entire month. Corresponding premium withholding amounts will be effective in the member's pay for that month. If the data is entered after the payroll processing cutoff for the mid-month payday, the entire monthly premium amount will be deducted from the member's end-month pay.

  Example: A member's SGLI election to increase coverage from $200K to $400K is input on 14 November. The member will be covered at the $400K level for the month of November and the member will be charged the full monthly premium for $400K coverage. The cost will be deducted from the member's end-month pay for November and the member will be credited with the amount of the deduction for the $200K premium cost withheld from his/her mid-month November pay.

Continued on next page

Elections and Beneficiaries, Continued

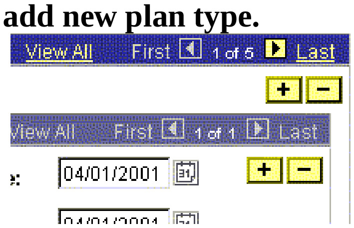
Procedure Log into Direct Access and follow the procedures below.

Step	Action
1	Select menu items in this order: Enterprise/Direct Access Content Menu > Compensate Employees > Administer Base Benefits > **Life and AD/D Benefits**
2	A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
3	The Life and AD/D Benefits page will display. There are two tabs on this page. • Elections • Beneficiaries The Elections tab must be completed first and is displayed when the page opens. 
4	Click the "View All" link at the top of the page to display all the plan types the member has on file. 

Continued on next page

Elections and Beneficiaries, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Review the plan types the member has on file.
<table>
<tr><th>Plan Type</th><th>Title</th><th>Purpose</th></tr>
<tr><td>20</td><td>Life</td><td>SGLI on the life of the member</td></tr>
<tr><td>25</td><td>Dependent Life</td><td>SGLI on the life of the spouse</td></tr>
<tr><td>2A</td><td>Death Gratuity Benefit</td><td>Payment of Death Gratuity when there is no surviving spouse or children.</td></tr>
<tr><td>2B</td><td>Member Missing</td><td>Person to receive an allotment of funds if member is missing or unable to transmit funds.</td></tr>
<tr><td>2C</td><td>Unpaid Pay & Allowances</td><td>Person(s) to receive unpaid pay & allowances due the member at the time of death.</td></tr>
</table>
If the Plan Type you need to change is not listed, add it by clicking the uppermost + button to add new plan type.


<--Add row button for new plan types
<-Add row button for new coverage elections within an existing plan type
A new row will be inserted. The Plan Type will default to an existing plan type, click the lookup icon to lookup and change the Plan Type before continuing.
If the Plan Type you need to change is listed, add a new coverage election by clicking the + in that Plan Type's row.
Note: If you are updated an existing election, and that election has not taken effect yet, you can make changes to it without first inserting a new row. If the Coverage Begin Date and Election Date fields are in the future, the election has not taken effect yet and can be changed.</td></tr>
</table>

Continued on next page

Elections and Beneficiaries, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Complete the Coverage Election as follows.
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Smoker</td><td>Not used, leave unchecked</td></tr>
<tr><td>Coverage Begin Date</td><td>Coverage begin date is required when setting up a new Coverage Election.

For SGLI/Family-SGLI plan types: Enter the current date (today's date). You cannot "Future Date" or "Back Date" SGLI elections. Always enter the current date in the Coverage begin date and Deduction begin date fields.

Other plan types: Enter the date the member made or changed beneficiary designations.

Enter the date or use the date calendar icon to bring up the date screen.

Note: The marriage certificate is required legal supporting documentation for SGLI-Family entries. Ensure the spouse's date of birth is correctly entered in Employee Family Member and Beneficiary Information, SGLI-Family premiums are based on the amount of coverage and the age of the spouse.</td></tr>
<tr><td>Deduction Begin Date</td><td>Deduction begin date will be setup based on the new hire date. Future changes will equal the Coverage Begin Date. No changes are required to this field.</td></tr>
<tr><td>Coverage Election</td><td>'Elect' is the default choice and cannot be changed for any plan type.</td></tr>
</table></td></tr>
</table>

Continued on next page

Elections and Beneficiaries, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td rowspan="3">6
(con't)</td><td>Benefit Plan</td><td>Click the 🔍 to lookup the Benefit Plan Code. SGLI has codes for coverage from $0 (declined) to $400K. Family Member SGLI has codes for coverage from $0 (declined) to $100K. The other plan types have only one code each:
<table>
<tr><th>Plan Type</th><th>Benefit Plan</th></tr>
<tr><td>Death Gratuity Benefit</td><td>DTHGRT</td></tr>
<tr><td>Member Missing</td><td>MBRMIS</td></tr>
<tr><td>Unpaid Pay & Allowances</td><td>UNPP&A</td></tr>
<tr><td>Dependent Life (Family-SGLI)</td><td>0 Zero Option Family SGLI
1 $10,000 Family SGLI Coverage
2 $20,000 SGLI Family Coverage
3 $30,000 SGLI Family Coverage
4 $40,000 SGLI Family Coverage
5 $50,000 SGLI Family Coverage
6 $60,000 SGLI Family Coverage
7 $70,000 SGLI Family Coverage
8 $80,000 SGLI Family Coverage
9 $90,000 SGLI Family Coverage
A $100,000 SGLI Family Coverage
Y - Administrative Stop. Can only be used by PPC Topeka.</td></tr>
</table></td></tr>
<tr><td>Coverage Options</td><td rowspan="2">These areas are not used.</td></tr>
<tr><td>Base Benefits</td></tr>
</table>

Continued on next page

Elections and Beneficiaries, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>
Click the Beneficiaries tab to enter the the member's beneficiary designations for the coverage you just added.
For SGLI elections (for insurance on the life of the member), the beneficiaries information may be left blank. SGLI beneficiary designations are made by the member on form SGLV-8286 and do not need to be duplicated in PeopleSoft to be valid. In PeopleSoft, we are primarily concerned with capturing the member's coverage election so the appropriate payroll transactions can be initiated. However, you must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.
Note: Before a person can be listed as a beneficiary you must add them using the Employee Family Member and Beneficiary Information update/change process
Complete the Beneficiary information as follows. Use the and buttons to add or remove beneficiary data rows.
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Plan Type</td><td>PeopleSoft populates the plan type from the Elections page.
Click on View All and then use the scroll bar to view additional plan types.</td></tr>
<tr><td>Coverage Begin Date</td><td rowspan="3">PeopleSoft populates these fields from the selected coverage.</td></tr>
<tr><td>Effective Date</td></tr>
<tr><td>Benefit Plan</td></tr>
<tr><td>Distribution By Law</td><td>Default value is Checked upon entry into the Coast Guard. This is used when no beneficiary is actually selected for the applicable benefit plan. Applies to SGLI only. Members should be cautioned not to use "By Law" elections for SGLI coverage, naming beneficiaries is always preferred.</td></tr>
<tr><td>Beneficiary ID</td><td>Click the for a listing of available beneficiaries. If the beneficiary is not listed, you will have to add them using the Employee Family Member and Beneficiary Information update/change process.
Note: You must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Elections and Beneficiaries, Continued

Procedure (con't)

Step	Action	
7 (con't)	**Field**	**Description/Instructions**
	Percent of Benefit	Percent of the benefit amount is must equal 100% for all Plan Types except Family Member SGLI, it will be blank, and Member Missing, it can be less than 100%.
	Flat Amount	Not used, leave blank.
	Payment Method	For SGLI, choose Lump Sum or Equal Payments as indicated on the member's SGLV-8286 form. All other Plan Types are Lump Sum.
	Excess	Not used, leave unchecked.
	Contingent	If this beneficiary is not the primary beneficiary, check this field. Whenever this field is checked, you must list a principle beneficiary or beneficiaries.
	Totals	PeopleSoft populates based on the sum of the values entered in the Percent of Benefit field for Primary and Contingent beneficiaries. The totals must equal 100% in order to save the data
8	Click  to save your changes. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.	

BAH/Dependency Data Form Print Procedures

Introduction

This section provides the procedure to print a BAH/Dependency/ form. Forms can be generated for individuals. A report, listing all the members at a unit and their BAH eligible family members is also available. See the Print Dependency Data By Unit topic for more information.

The BAH/Dependency data form lists a member's BAH eligible dependents and provides an area for the member to certify the accuracy of the information.

DEPARTMENT OF
HOMELAND SECURITY
U.S. COAST GUARD
COMPUTER GENERATED

BAH/DEPENDENCY DATA

EMPLID	NAME	RATE/RANK	CURRENT DUTY STATION
100000	Smith,John S.	Chief Boatswain'S Mate	000000 - CGC UNDERWAY
SERVICING PERSRU		MARITAL STATUS	DATE OF MARRIAGE
000269 - CG GP CHARLESTON		Married	10-JAN-1989

SPOUSE IN SERVICE INFORMATION

DEPENDENCY DATA

NAME	BAH ELIGIBLE DEPENDENT	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:	RELATIONSHIP:
Smith, Joan T.	YES	15-AUG-1968	10-JAN-1989	555121212	Spouse
Smith, John A.	YES	22-AUG-1994	22-AUG-199	123456789	Son
Smith, Jane, D.	YES	30-MAY-1998	30-MAY-1998	987654331	Daughter

FOR CG PERSONNEL SERVICE CENTER USE ONLY

The dependency status of the following family member(s) has been reviewed by PSC LGL in accordance with the CG Pay Manual, COMDTINST M7220.29(series) The family member(s) listed below are approved for BAH eligibility commencing on the dates(s) indicated:

NBR: DATE NBR: DATE NBR: DATE

NBR: DATE NBR: DATE NBR: DATE

PSC APPROVAL SIGNATURE: DATE:

MEMBER'S CERTIFICATION

By signature below, I certify that I am supporting the dependents listed above and I will notify my Commanding Officer/Office in Charge of any changes in dependency status. I am aware that making false statements on a claim against the U.S. Government is punishable by court-martial. The penalty for willfully making a false claim is: A maximum fine of $10,000 or maximum imprisonment of 5 years, or both (U.S. Code, Title 10, Section 287). I further certify that I have reviewed all entries on this form and by signature below, the information contained hereon is correct.

SIGNATURE OF MEMBER: DATE:

COMPGEN - Previous editions are obsolete.

Continued on next page

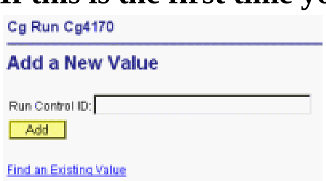
BAH/Dependency Data Form Print Procedures, Continued

Before you Begin

You need to have the employee ID number of the person you want to generate the BAH/Dependency Data Report form for available before you attempt to run this report. The employee ID number is a required field for this report. You cannot search for an employee ID number from within the report setup application.

Procedure

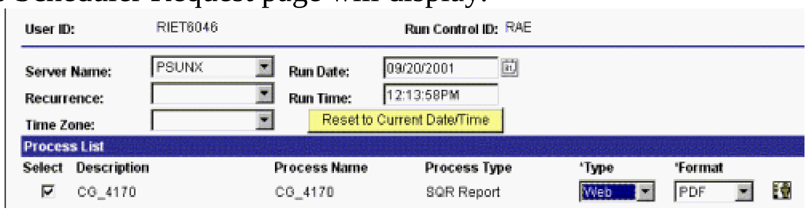
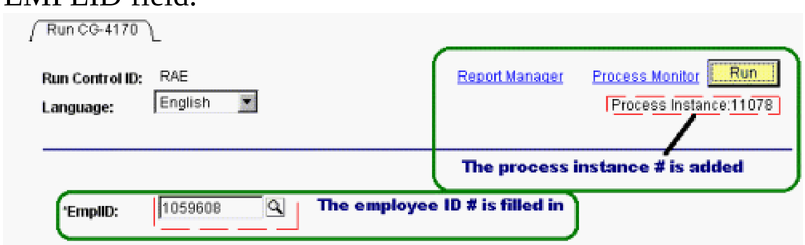
Log into Direct Access and follow these steps to print a BAH/Dependency Data form.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Administer Workforce > Administer Workforce (GBL) >Report > **Generate CG4170A** **Note: You can also access this report from the Dependency and Emergency Data Activity Guide**
2	The Run Control ID Entry Page will appear. Enter a run control ID or create a new one. **If you have used this process before**, enter your initials in the Run Control ID block and click the Search button. **If this is the first time you have used this process**, click the Add a New Value link.  1. Enter your initials in the Run Control ID block. 2. Click the Add button.
3	The CG-4170 Run page will display.  1. Enter the Employee ID of the member you want to generate a CG-4170A for in the **EmplID** field. 2. Click the Run button to begin processing.

Continued on next page

BAH/Dependency Data Form Print Procedures, Continued

Procedures (con't)

Step	Action
4	The Process Scheduler Request page will display.  In the **Server Name** field, click the drop-down menu and choose **PSUNIX**. Change the ***Type** field to "**Web**". Set the ***Format** field to "**PDF**". Click OK to continue. You will be returned to the Process Scheduler Request page. Click OK on the Process Scheduler Request page.
5	The Run CG-4170 page will display again. A "Process Instance" number will appear under the Process Monitor link and the Employee ID number will show in the EMPLID field. 
6	Follow the *Using Process Scheduler's Web Delivery Option* procedure in Part X, Chapter 2, Reports and Queries, to retrieve the report from the web server.

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BAH Dependency Data By Unit (Department)

Introduction

This section provides the procedure for running the BAH/Dependency Data form. The BAH/Dependency data form lists a member's BAH eligible dependents and provides an area for the member to certify the accuracy of the information.

DEPARTMENT OF
HOMELAND SECURITY
U.S. COAST GUARD
COMPUTER GENERATED

BAH/DEPENDENCY DATA

EMPLID	NAME	RATE/RANK	CURRENT DUTY STATION
100000	Smith,John S.	Chief Boatswain'S Mate	000000 - CGC UNDERWAY

SERVICING PERSRU	MARITAL STATUS	DATE OF MARRIAGE
000269 - CG GP CHARLESTON	Married	10-JAN-1989

SPOUSE IN SERVICE INFORMATION

DEPENDENCY DATA

NAME	BAH ELIGIBLE DEPENDENT	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER:	RELATIONSHIP:
Smith, Joan T.	YES	15-AUG-1968	10-JAN-1989	555121212	Spouse
Smith, John A.	YES	22-AUG-1994	22-AUG-199	123456789	Son
Smith, Jane, D.	YES	30-MAY-1998	30-MAY-1998	987654331	Daughter

FOR CG PERSONNEL SERVICE CENTER USE ONLY

The dependency status of the following family member(s) has been reviewed by PSC LGL in accordance with the CG Pay Manual, COMDTINST M7220.29(series) The family member(s) listed below are approved for BAH eligibility commencing on the dates(s) indicated:

NBR: DATE NBR: DATE NBR: DATE
NBR: DATE NBR: DATE NBR: DATE

PSC APPROVAL SIGNATURE: DATE:

MEMBER'S CERTIFICATION

By signature below, I certify that I am supporting the dependents listed above and I will notify my Commanding Officer/Office in Charge of any changes in dependency status. I am aware that making false statements on a claim against the U.S. Government is punishable by court-martial. The penalty for willfully making a false claim is: A maximum fine of $10,000 or maximum imprisonment of 5 years, or both (U.S. Code, Title 10, Section 287). I further certify that I have reviewed all entries on this form and by signature below, the information contained hereon is correct.

SIGNATURE OF MEMBER: DATE:

COMPGEN - Previous editions are obsolete.

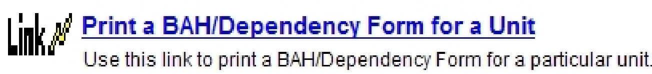
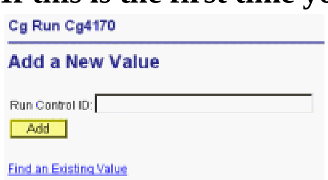
Continued on next page

BAH Dependency Data By Unit (Department), Continued

Procedure Log into Direct Access and follow these steps to complete this procedure

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):

Administer Workforce > Administer Workforce (GBL) > Use Dependency/Emergency Data</td></tr>
<tr><td>2</td><td>The Dependency/Emergency Data Activity Guide will display. Select the Print a BAH/Dependency From for a Unit link


</td></tr>
<tr><td>3</td><td>The Run Control ID Entry Page will open in a new window..
If you have used this process before, enter your initials in the Run Control ID block and click the 
 button.
If this is the first time you have used this process, click the Add a New Value link.


1. Enter your initials in the Run Control ID block.
2. Click the 
 button.</td></tr>
</table>

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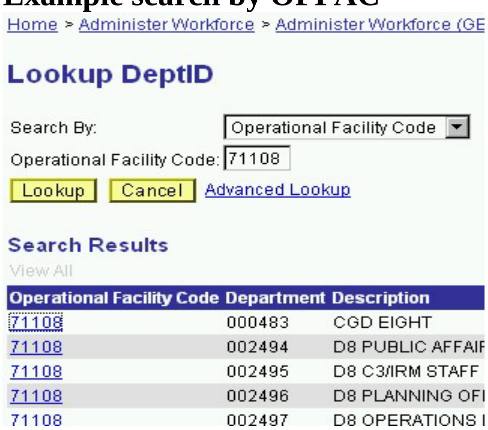
BAH Dependency Data By Unit (Department), Continued

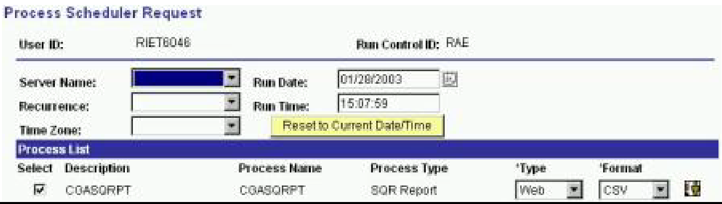
Procedures (con't)

Step	Action
4	The Run page will display.  1. Enter the Department ID of the unit you want to generate forms for. • You can use the button to lookup the Department ID if necessary. See Search Tips for help. Use the Search By Operational Facility Code (OPFAC) or Search Description Option to locate department IDs **Example search by OPFAC**  **Example search by description**  2. Click the Run button to begin processing.

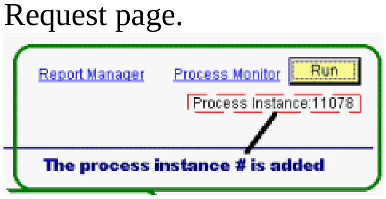
Continued on next page

BAH Dependency Data By Unit (Department), Continued

Procedures (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The Process Scheduler Request page will display

</td></tr>
<tr><td>6</td><td>Select Web from the Process Type drop down menu.

</td></tr>
<tr><td>7</td><td>Select PDF from the Format drop down menu.

PDF = Adobe Acrobat</td></tr>
<tr><td>8</td><td>Click the OK button to launch the process and return to the Process Scheduler Request page.</td></tr>
<tr><td>9</td><td>Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page.

</td></tr>
</table>

Continued on next page

BAH Dependency Data By Unit (Department), Continued

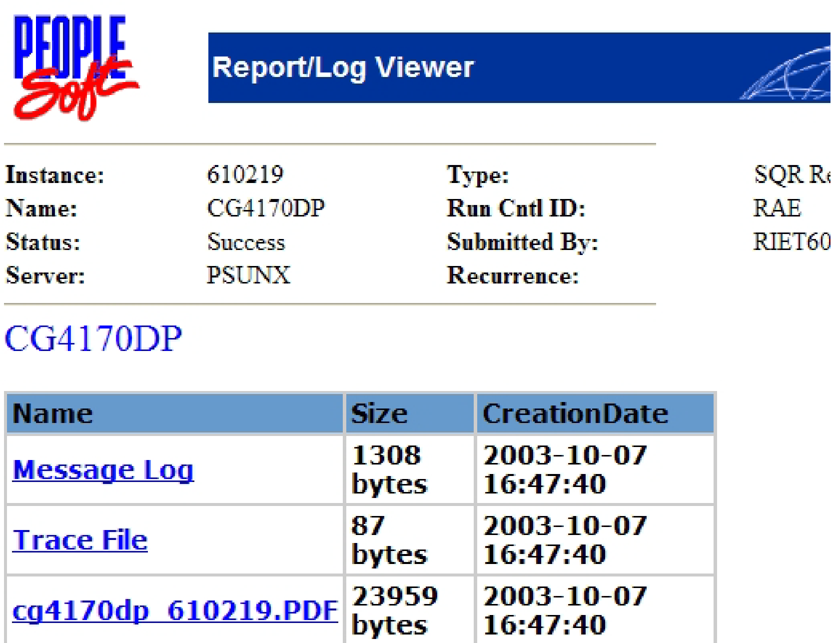
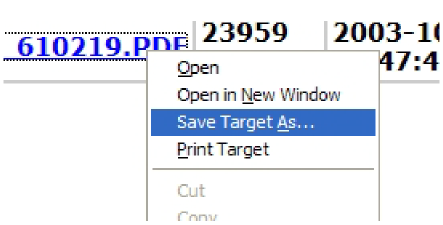
Procedures (con't)

Step	Action
10	The Process Monitor page will display. Click the **Refresh** button periodically until the **Run Status** shows "***Success***" and the Details link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded. 
11	Click the Details link. The Process Detail Page will display. Click the View Log/Trace link. 

Continued on next page

BAH Dependency Data By Unit (Department), Continued

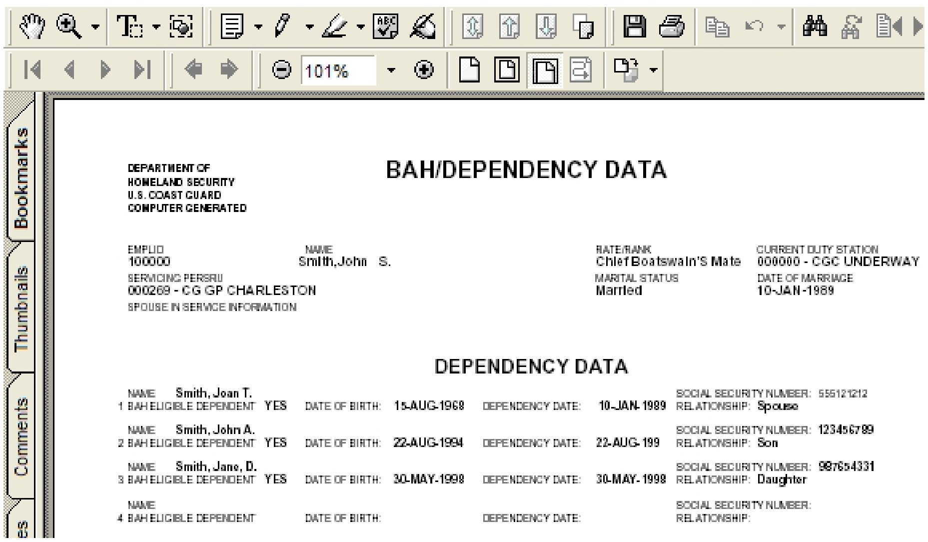
Procedures (con't)

Step	Action
12	The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, CG4170DP_610219.PDF is the link to the report).  **Note**: You can also save the report to your local system at this time by clicking the right mouse button and selecting "Save Target As...". You will be prompted to select a location to save the file to. 

Continued on next page

BAH Dependency Data By Unit (Department), Continued

Procedures (con't)

Step	Action
13	Your report will open and display in the web browser. Use the buttons in the Adobe Acrobat reader to save or print the report. 
14	Close the Report and Process Monitor windows
15	You can now either log out or select another Dependency and Emergency Data Activity.

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Employee Address and Home of Record

Introduction

This section provides the procedures for changing a member's home and mailing address and for viewing the Home of Record. The Home of Record is established in connection with accession documents and transactions. The Home of Record can only be corrected it cannot be changed.
Changes to the member's mailing address will be passed to JUMPS, Segment 66.

Effective Date

A mailing address change will normally be effective the first day of the month following the month it is submitted. If the mailing address change is submitted on the first day of the month, it will be effective the same month. Examples:

- A mailing address change submitted between 2 and 31 October, will be effective in November and be reflected on the LES issued for November.
- A mailing address change submitted on 1 November, will be effective in November and be reflected on the LES issued for November.
- A mailing address change submitted between 2 and 30 November, will be effective in December and be reflected on the LES issued for December.

Government Travel Charge Cardholders

Note that address changes submitted for personnel and pay data (Change Home or Mailing Address or Employee Address and Home of Record) are not provided to Citibank. Card holders must notify Citibank, separately, when their address changes.

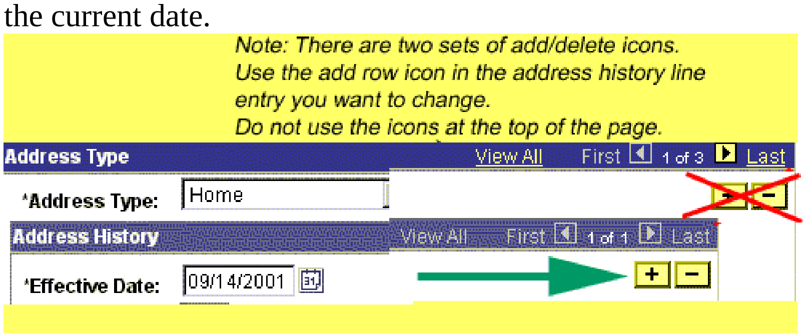
In order to update the address, the cardholder needs to call Citibank at the toll free number listed on the back of their government travel charge card and update their mailing address with Citibank. The toll free number is 1-800-790-7206.

Continued on next page

Employee Address and Home of Record, Continued

Procedures

Log into Direct Access and and follow these steps to view, enter or change a member's address information.

Step	Action
1	Select menu items in this order: Home > Administer Workforce > Administer Workforce > Use > **Addresses**
2	A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
3	The Address page will display. Most members will have three address types on file: 1. Home 2. Home of Record 3. Mailing (Reflected on member's LES. Used for mailing of W2 forms and other official correspondence.) Select the address type you want to view. Only one address type will be displayed when you first access the page. Use the "View All" or navigation arrow links View All First 1 of 3 Last to view the other addresses. You cannot delete or change address data, click the + button in the to add a new row. This will create a new row of the same address type, the existing address data will automatically be added to the new row. The effective date of the new row will show the current date. 

Continued on next page

Employee Address and Home of Record, Continued

Procedures (con't)

Step	Action
4	Enter the address data.

Field	Description/Instructions
Address Type	Drop-Down menu. The field will be set to the appropriate address type (home or mailing) when you add the new row.
Effective Date	The effective date of the new row will show the current date. You may future date this transaction. You cannot backdate this transaction. A mailing address change will normally be effective the first day of the month following the month it is submitted. If the mailing address change is submitted on the first day of the month, it will be effective the same month. Examples: • A mailing address change submitted between 2 and 31 October, will be effective in November and be reflected on the LES issued for November. • A mailing address change submitted on 1 November, will be effective in November and be reflected on the LES issued for November. • A mailing address change submitted between 2 and 30 November, will be effective in December and be reflected on the LES issued for December.
Country	Enter "USA" for U. S. Addresses or click the button to lookup a country code.
Address 1	The first line of the member's address (e.g. "123 Main Street" or "P.O.Box 12").
Address 2	Not used, leave blank (data in these fields will not be passed to JUMPS, Segment 66, when updating the member's mailing address).
Address 3	
City	Enter the City
County	County, if known
State	Enter the standard two-letter state abbreviation code. Click the icon to perform a lookup of codes if necessary.
Postal	Zip or Postal code.

Continued on next page

Employee Address and Home of Record, Continued

Procedures (con't**)**

Step	Action
5	Click the  button to save your work. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. **You may now exit the system or choose another function from the menus.**

Employee Marital Status, Address, Phone and Email Change

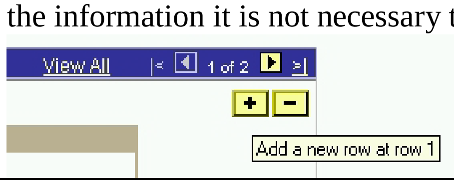
Introduction

This section provides the procedures for viewing, entering or updating a member's:

- Marital Status
- Home Address (View only. Go to Volume III, Chapter 8 of the DA SPO Manual, Employee Address and Home of Record topic if the address needs to be changed.)
- Email Address(s)
- Phone Number(s)

Procedure

Log into Direct Access and follow these steps to view, enter or change a member's marital status and address information.

Step	Action
1	Select Menu items in the following order. Home > Administer Workforce > Administer Workforce > Use > **Personal Data** A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
2	The Employee Personal Data page will display. **If you are changing the member's marital status, click the + to begin a new transaction**. The effective date field will change to today's date and the number of rows will increase. If you are just viewing the information it is not necessary to add a new row. 

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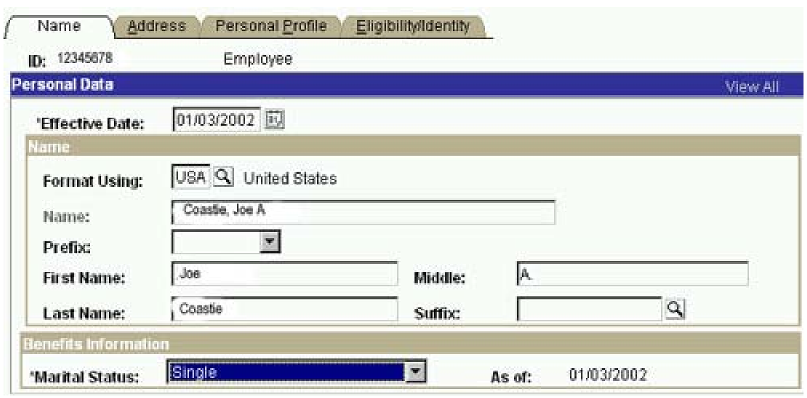
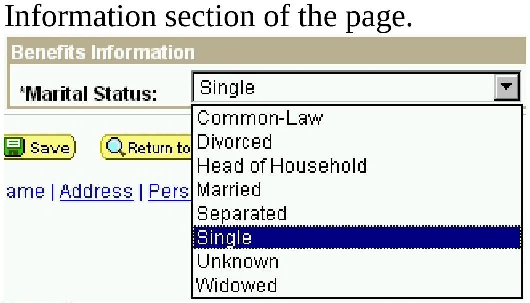
Employee Marital Status, Address, Phone and Email Change,
Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
The member's marital status is shown on the first tab (Name tab of the Personal Data page).

Reminder: If a member's marital status changes you must also update Employee Family Member and Beneficiary Information, enter new Elections and Beneficiaries and create new Elections for SGLI/FSGLI.


Enter the effective date of the change in the Effective Date field (dates are all numeric and are entered in MM/DD/YYYY format, click the icon to look up the date if necessary). Note: This is not the date that will be reflected as the Date of Marriage on the BAH/Dependency Data form. Update/correct the spouse's Marital Status Date if the BAH/Dependency Data form does not show the correct date.
Choose the Marital Status from the drop down menu in the Benefits Information section of the page.



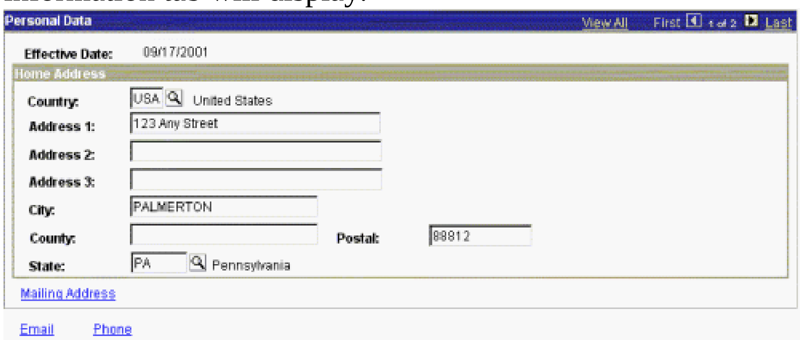
Click Save to save the information or continue with the steps below to update the member's address information.
</td></tr>
</table>

Continued on next page

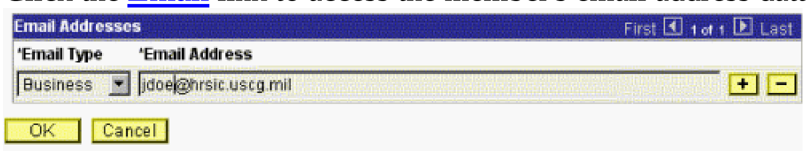
Employee Marital Status, Address, Phone and Email Change,
Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
Click the Address tab, at the top of the window, or Next tab button, at the bottom of the page, to access the member's address information. The member's home address information tab will display.



Go to Volume III, Chapter 8 of the DA SPO Manual, Employee Address and Home of Record topic, if the address needs to be changed.
</td></tr>
<tr><td>5</td><td>Click the Mailing Address link to access the member's mailing address. Go to Employee Address and Home of Record topic if the address needs to be changed.</td></tr>
<tr><td>6</td><td>Click OK. You will return to the member's home address data tab.</td></tr>
<tr><td>7</td><td>
Click the Email link to access the member's email address data.



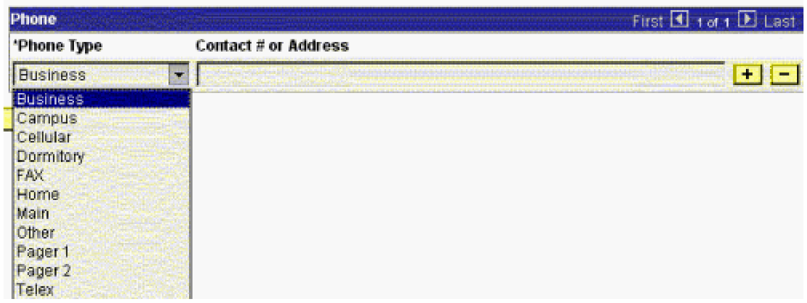
Update/Change the member's business email address as necessary. Click the + button to add a home or other type address. Click the − to remove an address type.
Click OK. You will return to the member's home address data tab.

Warning: Do not use a .COM, .NET or .ORG address as the member's business email address. Only .MIL, .GOV and .EDU domains are permitted. Directing system-generated emails to personal accounts hosted by internet service providers is prohibited.
</td></tr>
</table>

Continued on next page

Employee Marital Status, Address, Phone and Email Change,
Continued

Procedure (con't)

Step	Action
8	Click the Phone link to access the member's phone numbers. Each member should have three Phone-Types: 1. Business -- Member's work number 2. Main -- Home number of member or home number of spouse if member and spouse do not reside together. 3. Home -- Member's home phone number (can be the same as "Main").  Update/Change the member's business phone number as necessary. Click the [+] button to add a home or other type phone. Click the [-] to remove an phone type. Click [OK]. You will return to the member's home address data tab.
9	Click [Save] to save the information. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.
10	You can now exit the system by signing off or use the menu links to begin another transaction.

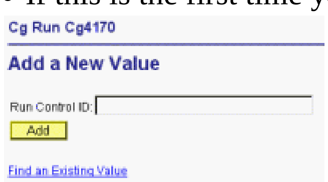
Emergency Contact Data By Unit (Department)

Introduction

This section provides the procedure for running the Emergency Contact Data report. The report includes the names, addresses, phone numbers of people the member has designated to be notified in the event of an emergency.

Procedure

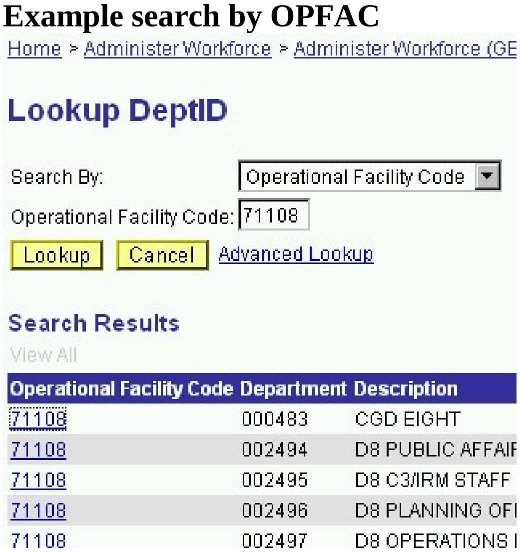
Log into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Administer Workforce > Administer Workforce (GBL) > Use **Dependency/Emergency Data**
2	The Dependency/Emergency Data Activity Guide will display. Select the Print Emergency Contact Information for a Unit link. 
3	The Run Control ID Entry Page will open in a new window.. • **If you have used this process before**, enter your initials in the Run Control ID block and click the Search button. • If this is the first time you have used this process, click the Add a New Value link.  1. Enter your initials in the Run Control ID block. 2. Click the Add button.

Continued on next page

Emergency Contact Data By Unit (Department), Continued

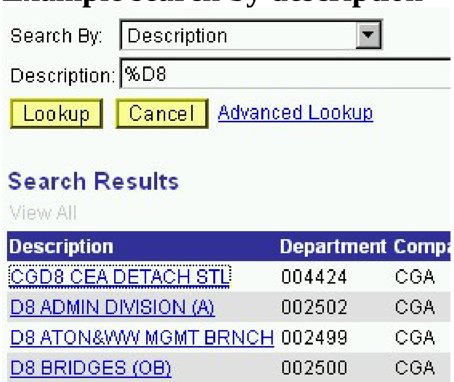
Procedure (con't)

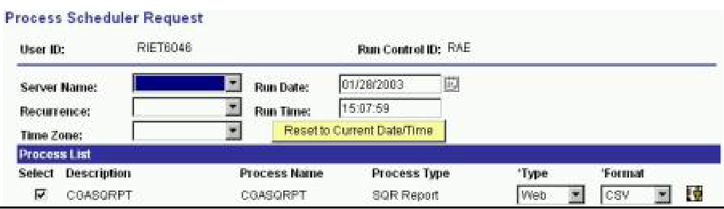
Step	Action
4	The Run page will display.  1. Enter the Department ID of the unit you want to generate forms for. • You can use the button to lookup the Department ID if necessary. See Search Tips for help. Use the Search By Operational Facility Code (OPFAC) or Search Description Option to locate department IDs **Example search by OPFAC** 

Continued on next page

Emergency Contact Data By Unit (Department), Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(con't)</td><td>Example search by description


2. Click the Run button to begin processing.</td></tr>
<tr><td>5</td><td>The Process Scheduler Request page will display

</td></tr>
<tr><td>6</td><td>Select Web from the Process Type drop down menu.

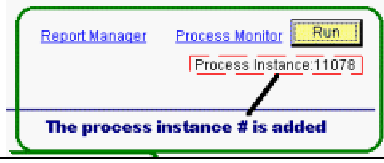

Warning: Do not use a non USCG.MIL/DHS.GOV address as your business email address. Directing system-generated emails to personal accounts hosted by internet service providers is prohibited. To ensure compliance, always select "Web" from the Type menu.</td></tr>
<tr><td>7</td><td>Select PDF from the Format drop down menu.

PDF = Adobe Acrobat</td></tr>
</table>

Continued on next page

Emergency Contact Data By Unit (Department), Continued

Procedure (con't)

Step	Action
8	Click the **OK** button to launch the process and return to the Process Scheduler Request page.
9	Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page. 
10	The Process Monitor page will display. Click the **Refresh** button periodically until the **Run Status** shows "***Success***" and the Details link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded. 

Continued on next page

Emergency Contact Data By Unit (Department), Continued

Procedure (con't)(con't)

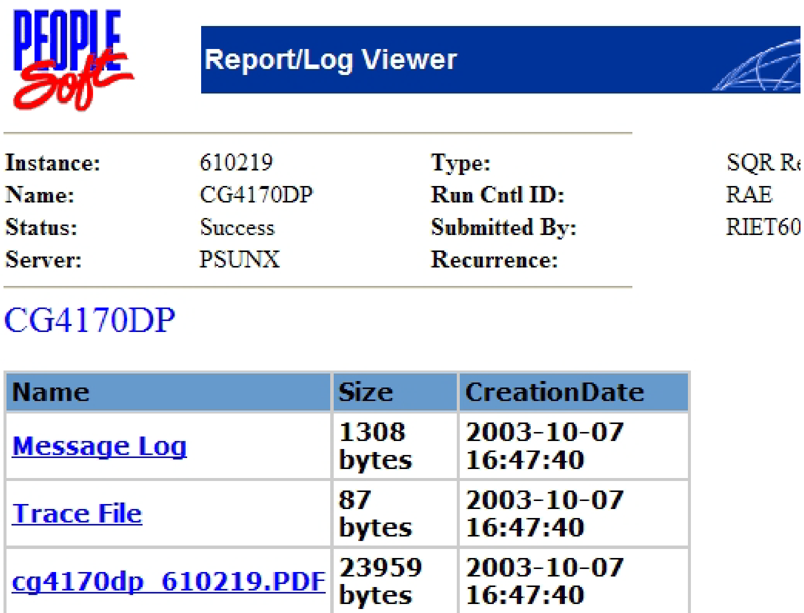
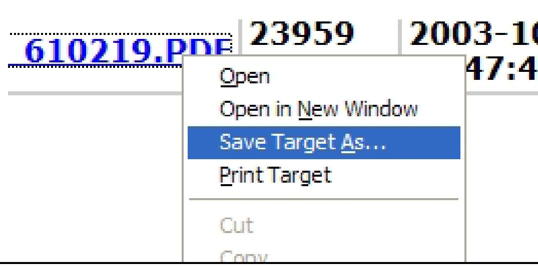
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>Click the Details link. The Process Detail Page will display. Click the View Log/Trace link.


</td></tr>
</table>

Continued on next page

Emergency Contact Data By Unit (Department), Continued

Procedure (con't)

Step	Action
12	The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, CG4170DP_610219.PDF is the link to the report).  **Note**: You can also save the report to your local system at this time by clicking the right mouse button and selecting "Save Target As...". You will be prompted to select a location to save the file to. 
13	Your report will open and display in the web browser. Use the buttons in the Adobe Acrobat reader to save or print the report.
14	Close the Report and Process Monitor windows.
15	You can now log out or select another activity from the Dependency and Emergency Data Activity page.

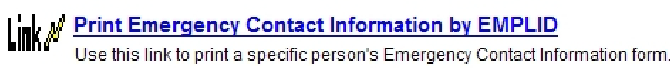
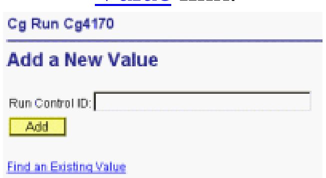
Print Emergency Contact Information By Employee ID

Introduction

This section provides the procedure for printing a member's emergency contact information. The report includes the names, addresses, and phone numbers of people the member has designated to be notified in the event of an emergency

Procedure

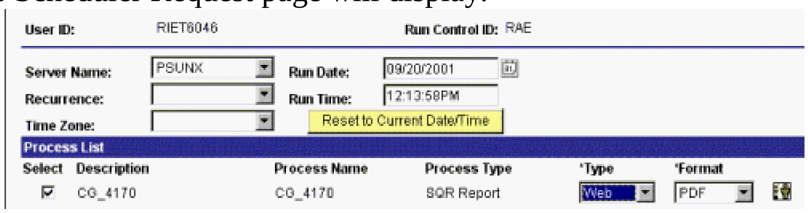
Log into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Administer Workforce>Administer Workforce (GBL)>Use **Dependency/Emergency Data**
2	The Dependency/Emergency Data Activity Guide will display. Select the Print Emergency Contact Information by EMPLID link 
3	The Run Control ID Entry Page will open in a new window. **If you have used this process before**, enter your initials in the Run Control ID block and click the Search button. • **If this is the first time you have used this process**, click the Add a New Value link.  1. Enter your initials in the Run Control ID block. 2. Click the Add button.
4	The Run page will display.  1. Enter the Employee ID of the member you want to generate an Emergency Contact listing for. • You can use the 🔍 button to lookup the EmplID if necessary. See Search Tips for help. 2. Click the Run button to begin processing.

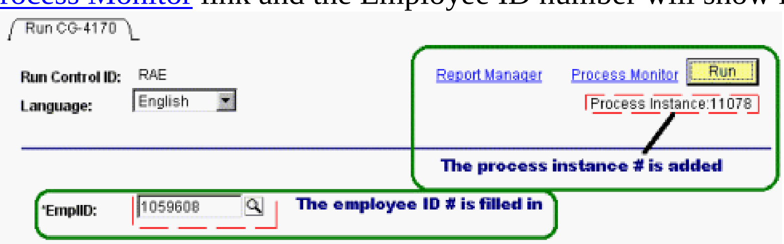
Continued on next page

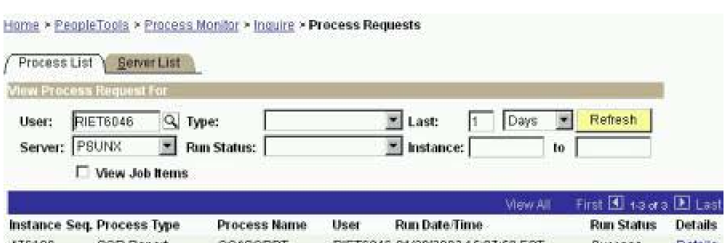
Print Emergency Contact Information By Employee ID,
Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The Process Scheduler Request page will display.


In the Server Name field, click the drop-down menu and choose PSUNX. Change the *Type field to "Web". Set the *Format field to "PDF".

</td></tr>
<tr><td>6</td><td>Click OK to continue. You will be returned to the Process Scheduler Request page.
Click OK on the Process Scheduler Request page.</td></tr>
<tr><td>7</td><td>The Run page will display again. A "Process Instance" number will appear under the <u>Process Monitor</u> link and the Employee ID number will show in the EMPLID field.


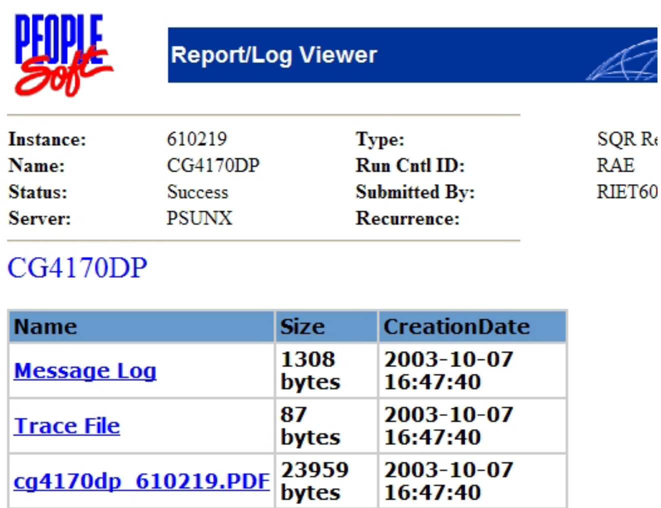
Click the Process Monitor link</td></tr>
<tr><td>8</td><td>The Process Monitor page will display. Click the Refresh button periodically until the Run Status shows "Success" and the <u>Details</u> link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.

</td></tr>
</table>

Continued on next page

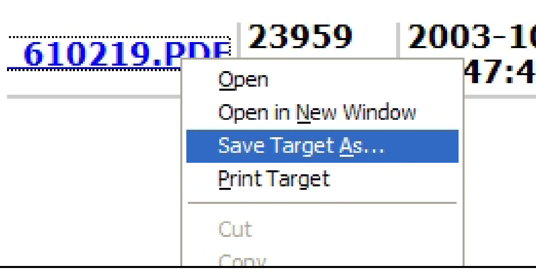
Print Emergency Contact Information By Employee ID,
Continued

Procedure(con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>Click the Details link. The Process Detail Page will display. Click the View Log/Trace link.</td></tr>
<tr><td>10</td><td>The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, CG4170DP_610219.PDF is the link to the report).



Note: You can also save the report to your local system at this time by clicking the right mouse button and selecting "Save Target As...". You will be prompted to select a location to save the file to.



</td></tr>
<tr><td>13</td><td>Your report will open and display in the web browser. Use the buttons in the Adobe Acrobat reader to save or print the report.</td></tr>
<tr><td>14</td><td>Close the Report and Process Monitor windows.</td></tr>
<tr><td>15</td><td>You can now log out or select another activity from the Dependency and Emergency Data Activity page.</td></tr>
</table>

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Recall Roster

Introduction

The Recall Roster lists the home addresses, phone numbers and email addresses for regular, reserve and civilian personnel assigned to the unit.

This query provides results for an individual unit. A similar query, which will provide results for all units within an ISC's or PERSRU(SPO)'s area of responsibility is also available. See Recall Roster By ISC/HRS for more information.

Why doesn't the report list all unit personnel?
Only those members with at least one phone number (business, home, cell, etc.) entered in the system will appear on the report. If the member hasn't listed any contact numbers, they will not appear on the report.

Why are some personnel listed multiple times?
Each person will be listed once for each type of phone number (business, home, cell, etc.) and e-mail address they have entered in the system.

Before you Begin

Set Internet Explorer to Allow Pop-ups from the Direct-Access site.

Procedure

Log into Direct Access and follow these steps to complete this procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):

Home > PeopleTools > Query Manager > Use > Query Manger</td></tr>
<tr><td>2</td><td>The Find an Existing Query page will display. Click in the blank field to the right of "begins with" and enter "CG_RECALL", then click the search button.

</td></tr>
<tr><td>3</td><td>Click the Run link in the search results section for the CG_RECALL_CONTACT_INFO_OWNUNIT query.</td></tr>
</table>

Continued on next page

Recall Roster, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Query page will display in a new window. Enter the criteria and click the View Results button.

<table>
<tr><th>Criteria</th><th>Description/Enter</th></tr>
<tr><td>Enter SETID of 'AUSCG'</td><td>Enter AUSCG, this selects Active units. Do not leave blank and do not enter anything else.</td></tr>
<tr><td>DeptID</td><td>Enter the Department ID number.

Use the lookup icon to search for the ID if necessary.</td></tr>
</table></td></tr>
<tr><td>5</td><td>The query results will display. Use the Download results in: Excel SpreadSheet CSV Text File links to save a copy of the query to your local system.

Note: For best results, click on the CSV Text File link and select the Save option from the resulting dialog box. Then, open the file with MS Excel.</td></tr>
</table>

Recall Roster By ISC/HRS

Introduction

The Recall Roster lists civilian, active duty and reserve members' home addresses, phone numbers and email addresses for units within a Integrated Support Command's or Servicing Personnel Office's area of responsibility.

- This query provides results by ISC/PERSRU(SPO). A similar roster, which provides results for an individual unit is also available, see Recall Roster By Department ID for information.

Why doesn't the report list all unit personnel?
Only those members with at least one phone number (business, home, cell, etc.) entered in the system will appear on the report. If the member hasn't listed any contact numbers, they will not appear on the report.

Why are some personnel listed multiple times?
Each person will be listed once for each type of phone number (business, home, cell, etc.) and e-mail address they have entered in the system.

Before You Begin

Set Internet Explorer to Allow Pop-ups from the Direct-Access site.

Procedure

Log into Direct Access and follow these steps to complete this procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):

Home > PeopleTools > Query Manager > Use > Query Manger</td></tr>
<tr><td>2</td><td>The Find an Existing Query page will display. Click in the blank field to the right of "begins with" and enter "CG_RECALL", then click the search button.


</td></tr>
</table>

Continued on next page

Recall Roster By ISC/HRS, Continued

Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Select CG_RECALL_CONTACT INFO ROSTER and click the Run link in the search results section.</td></tr>
<tr><td>4</td><td>The Query page will display in a new window. Enter the criteria and click the View Results button.


<table>
<tr><th>Criteria</th><th>Description/Enter</th></tr>
<tr><td>Enter SETID of 'AUSCG'</td><td>Enter AUSCG, this selects Active units. Do not leave blank and do not enter anything else.</td></tr>
<tr><td>DEPTID</td><td>Enter your ISC's or PERSRU's department ID number.

Use the lookup icon to search for the ID if necessary.</td></tr>
<tr><td>Rel Type</td><td>Select the Relationship Type from the drop-down list.

Human Resource Site -- Will return results for all units in the HRS/PERSRU's AOR.
Integrated Support Command -- Will return results for all units in the ISC's AOR.

Other Relationship Types are not used in this procedure.
This query provides results by ISC/PERSRU(SPO). A similar roster, which provides results for an individual unit is also available, see Recall Roster By Department ID for information.</td></tr>
</table></td></tr>
<tr><td>5</td><td>The query results will display. Use the Download results in: Excel Spreadsheet CSV Text File links to save a copy of the query to your local system.

Note: For best results, click on the CSV Text File link and select the Save option from the resulting dialog box. Then, open the file with MS Excel.</td></tr>
</table>

Divorce, Annulment or Death of Spouse

Introduction

There are four areas in Direct-Access which need to be updated when a member reports a change in marital status (due to divorce, annulment or death of spouse). They are:

Area to Update	Reason
1. Elections & Beneficiaries	Stop Family SGLI Deduction
2. Dependent /Beneficiary Data	Change relationship to "*ExSpouse*". Remove checkmark from BAH eligibility and record date of divorce or date of death.
3. Personal Data	Change member's marital status and effective date of change.
4. Employee Entitlements	If member has no remaining BAH eligible dependents (e. g. No children or divorced and is not the primary custodian of a dependent child) BAH & COLA entitlements need to be changed. Members paying child support may be eligible for BAH-Child.

Scenario

In this scenario the member submitted a BAH/Dependency worksheet (CG-2025) and a copy of a divorce decree dated 15 October 2007. The member's former spouse has been awarded primary physical custody of the couple's child and the member has been ordered to provide support.

Stop deduction for FSGLI

Our first step is to stop the deduction for Family SGLI coverage. The member is no longer married and is not eligible for coverage on the life the former spouse. However, coverage continues on the life of dependent children (at no charge) because the member has an SGLI election.

Procedure

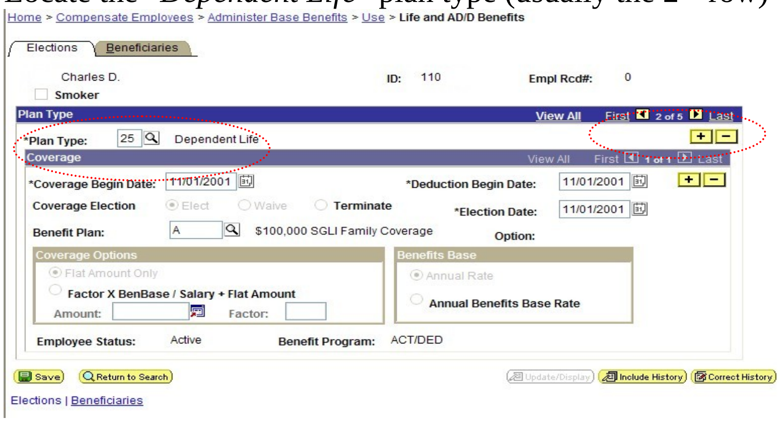
Long into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Path to: Compensate Employees > Administer Base Benefits > Use > Life and AD/D Benefits

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

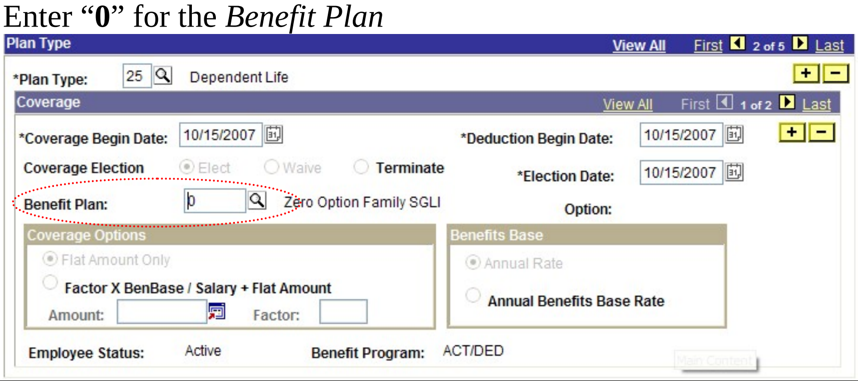
Stop Deduction For FSGLI Procedure (con't)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Locate the "Dependent Life" plan type (usually the 2nd row)


Note: If the current Benefit Plan is "0", the member has previously declined FSGLI coverage and you may exit this page.</td></tr>
<tr><td>3</td><td>Press the add row button - + (within the Coverage section of the Dependent Life plan type) to start a new transaction.

</td></tr>
<tr><td>4</td><td>Enter the date of the divorce or the date of the spouse's death in the Coverage Begin Date field.


Note how the other date fields automatically populate with the current date when you tab out of the field.

</td></tr>
<tr><td>5</td><td>Enter "0" for the Benefit Plan

</td></tr>
<tr><td>6</td><td>Click the Save button.</td></tr>
</table>

Continued on next page

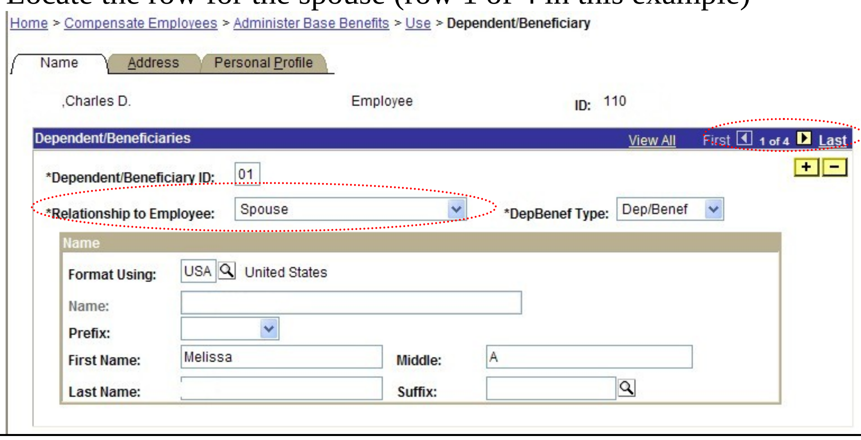
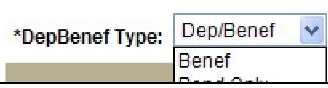
Divorce, Annulment or Death of Spouse, Continued

Update Dependent/ Beneficiary Data

This procedure is used to change the status of BAH Eligible Family members. **Family members are not deleted from the member's record when their status changes**. For example, if a member reports a divorce, you would change the spouse's relationship to "Former Spouse" and de-select the BAH Eligible box on Personal Profile page along with updating the marital status and marital status date.

Procedure

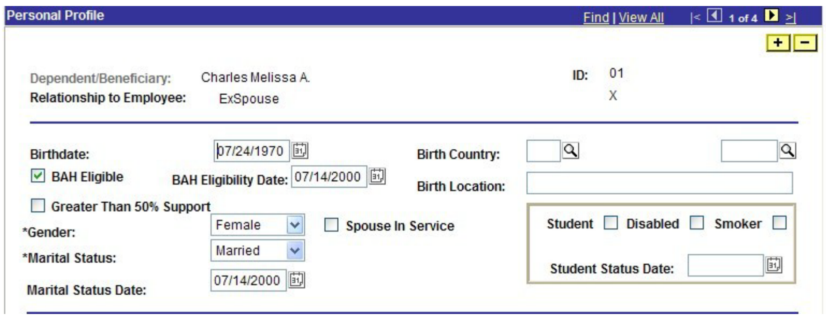
Log into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Path to: Compensate Employees>Administer Base Benefits>Use>Dependent/ Beneficiary
2	Locate the row for the spouse (row 1 of 4 in this example) 
3	Change the ***Relationship to Employee*** field to "**ExSpouse**". 
4	Change the ***Dep/Ben*** *Type* field to "**Benef**" (beneficiary). 

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

Update Dependent/ Beneficiary Data Procedure (con't)

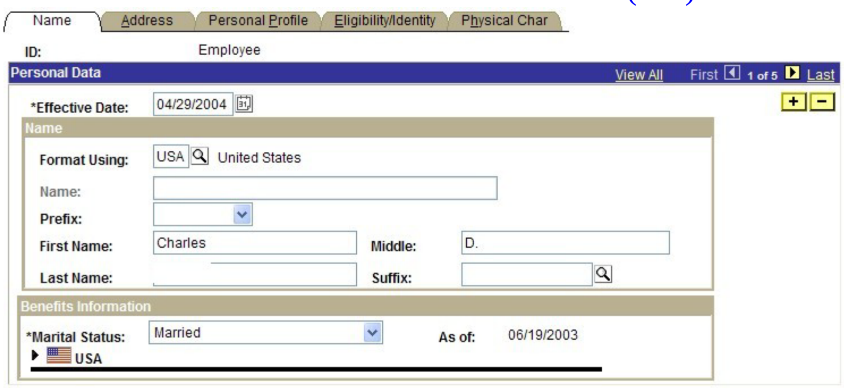
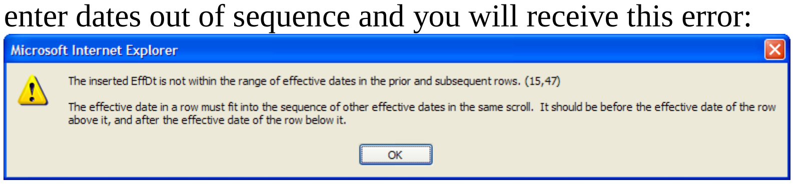
Step	Action
5	Go to the Personal Profile tab. 
6	**Remove** the checkmark from the *BAH Eligible* field.  Note: **Do not** remove the **date** from the *BAH Eligibility Date* field. The original eligibility date must be maintained in the system to support previous entitlement entries (e. g. FSGLI, BAH, COLA, etc.).
7	If you are recording a divorce, change the *Marital Status* filed to "**Divorced".** 
8	If you are recording a divorce, change the *Marital Status Date* field to the date of the divorce. 
9	If you are recording the death of a spouse, enter the date in the *Date of Death* field. 
10	Click the  button.

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

Update Personal Data Procedure

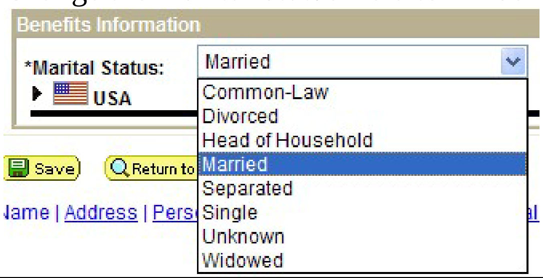
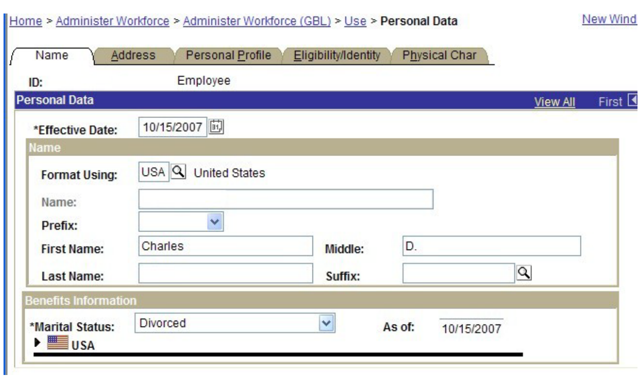
This procedure is used to update the member's marital status.

Step	Action
1	Path to: Administer Workforce > Administer Workforce (Gbl) > Use > **Personal Data** 
2	Insert a new row 
3	Change the *Effective Date* field of the new row to the date of the divorce or death of the spouse.  Note: If the effective date in the existing first row (see step 1 above) is later than the date of divorce of death of spouse (e. g. Other transactions have been entered in Personal Data) use the current date as the *Effective Date* for this change. You cannot enter dates out of sequence and you will receive this error:  In these cases click the "**Correct History**" button, you will again be prompted to save your changes, select "No". The page will reload, insert a new row (with the date of divorce or death of the spouse) and make the status change per the remainder of this procedure. The error message (above) will appear again, however you will be able to save your changes.

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

Update Personal Data Procedure (con't)

Step	Action
4	Change the *Marital Status* field to "**Divorced**" or **"Widowed"** as appropriate. 
5	Review your changes (Note: If the member's address has changed, you can update now by clicking on the Address tab label). 
6	Click the  button.

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

Update pay entitlements

If member has no remaining BAH eligible dependents (e. g. No children or divorced and is not the primary custodian of a dependent child) BAH & COLA entitlements need to be changed from with dependents to without dependents. Members paying child support may be eligible for BAH-Child. Please refer to the following for guidance on determining and updating pay entitlements:

The following references provide additional information about Basic Allowance for Housing and Cost of Living Allowances:

- Joint Federal Travel Regulations (JFTR), Chaps 9 & 10
- U.S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap 3
- DA SPO Manual, Part II, Pay Entitlements

Effective dates for entitlement entries

Per U.S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap 3 (figure 3-14, rules 1 and 2), BAH entitlement at the with-dependents rate stops at 2400 on the date of the spouse's death or the date of divorce if the member's spouse was the sole BAH eligible dependent. Entitlement to COLA at the with dependents rate also terminates at the same time.

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

Effective dates for entitlement entries

When entering transactions in Direct Access to:

- Stop BAH or COLA use the date of death of the spouse or date of divorce as the effective date.
- Start BAH or COLA use the date the day after the date of death of the spouse or date of divorce as the effective date.

BAH Entitlement Example Entry: Divorce is effective on 15 October 2007. The member's former spouse has been awarded primary physical custody of the couple's child and the member has been ordered to provide support. The SPO has determined the member is entitled to BAH-Child (amount support exceeds the difference between BAH with dependents and without dependents):

Entitlements

*Earnings Code: BA1 BAH (Basic Allow for Housing)

	*Start Date	Start Time/Seq	Stop Date	Stop Time/Seq	*Earnings Type	Description	Approval Status	Manual Row Switch	Detail	Approve
1	10/16/2007	0000		0000	BAH-T	With Dep; based on payment of child support; mbr not assigned govt qtrs	P		Detail	Approve
2	12/31/2006	2513	10/15/2007	2514	BAH-L	With Dep; MBR and Dep not assigned govt qtrs	P		Detail	Approve

COLA Entitlement Example Entry: Member divorced on 15 October 2007. The SPO has determined that the member is not entitled to COLA at the with dependents rate (dependent child resides with former spouse):

*Earnings Code: ICC CONUS COLA

	*Start Date	Start Time/Seq	Stop Date	Stop Time/Seq	*Earnings Type	Description	Approval Status	Manual Row Switch	Detail	Earr
1	10/16/2007	0000		0000	COLAWO	CONUS COLA Without DEPNS	P		Detail	
2	12/31/2006	0000	10/15/2007	0000	COLAWD	CONUS COLA With DEPNS	P		Detail	

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

Additional steps for Reserve Component members

If the member is reservist who has completed 20 years satisfactory service, and at that time elected to cover his/her spouse under the Reserve Component Survivor Benefit Plan (RCSBP), then the reservist needs to take the following action:

If Spouse is Lost Due to	Then Reservist may	Action to Take
Death	(a) Suspend / terminate RCSBP coverage (b) Resume RCSBP coverage if reservist later remarries	(a) Send copy of spouse's death certificate to PPC (RAS). (b) Complete new Form CG-11221 electing coverage for the new spouse. Form must be completed within one year of remarriage; Section VII shall be annotated to reflect a change to the original 20-year RCSBP election. A copy of the CG-11221 must be filed in the SPO PDR. The original new CG-11221, death certificate, and marriage certificate must be sent to PPC (RAS).
Divorce or Annulment	(a) Suspend RCSBP coverage (b) Voluntarily elect to cover the former spouse under RCSBP	(a) Send copy of divorce decree to PPC (RAS). (b) Complete new Form CG-11221 electing former spouse coverage. Form must be completed within one year of divorce; Section VII shall be annotated to reflect a change to the original 20-year RCSBP election. A copy of the CG-11221 must be filed in the SPO PDR. The original new CG-11221 and divorce decree must be sent to PPC (RAS).

Continued on next page

Divorce, Annulment or Death of Spouse, Continued

Additional steps for Reserve Component members **(continued)**

If Spouse is Lost Due to	Then Reservist may	Action to Take
Divorce or Annulment (cont'd)	(c) Later remarry and elect to cover new spouse under RCSBP	(c) Complete new Form CG-11221 electing coverage for the new spouse. Form must be completed within one year of remarriage; Section VII shall be annotated to reflect a change to the original 20-year RCSBP election. A copy of the CG PPC-11221 must be filed in the SPO PDR. The original new CG-11221, divorce decree, and marriage certificate must be sent to PPC (RAS).

Questionable Dependent/PPC Legal Approval

Introduction

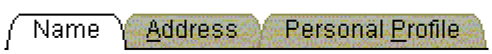
This section provides procedures on how to enter a questionable dependent to a member's **BAH/Dependency form** for PPC Legal approval. Questionable BAH eligible dependents are defined in Chapter 3-D and Figure 3-8 of the Coast Guard Pay Manual, COMDTINST M7220.29 (series), Marking the BAH eligible box and entering eligibility date will allow the questionable dependent to be printed on the BAH/Dependency form without initiating Pay actions. Questionable dependents requiring PPC Legal approval will be entered as dependents but WILL NOT have the entitlements portions completed until AFTER approval is received from PPC Legal. Once the data is entered and saved, it can be printed on a BAH/Dependency Report (old CG-41701A). See BAH Dependency Form Print Procedure for more information.

Reference

Before requesting the addition of a questionable dependent as a BAH eligible family member, you should consult Chapter 3-D and Figure 3-8 of the Coast Guard Pay Manual, COMDTINST M7220.29 (series).

Pages and Tabs

Processing family member/beneficiary information consist of one page and three tabs.



1. The **Name** tab enables you to record the family member name and relationship to the member. You must use the Name tab to add dependent records.
2. The **Address** tab enables you to record the family member address information.
3. The **Personal Profile** tab enables you to record BAH eligibility, birth date and other personal information about the family member.

Continued on next page

Questionable Dependent/PPC Legal Approval, Continued

Process

ALWAYS consult Chapter 3-D and Figure 3-8 of the Coast Guard Pay Manual, COMDTINST M7220.29 (series) for complete guidance and requirements for dependency approval. All requests for the addition of a questionable dependent are sent to:

Commanding Officer (LGL)
U.S. Coast Guard
Pay & Personnel Center
444 S.E. Quincy Street
Topeka, KS 66683-3591

Legal Ward

REQUIRED FORMS

- Direct Access BAH/Dependency Data Report with Legal Ward child listed.
- CG-2020, Dependency Worksheet
- Court Order: Must be signed by a Judge – The court order must give temporary custody or guardianship of a child (under 21 years of age) to the member, for at least 12 consecutive months. If the court order is silent on the time element (does not list dates or a time frame), the member must send a ***notarized statement*** as to how long he plans to keep the Legal Ward child in the household).
- CG-2020A, Support Statement ***OR*** a Notarized Statement from the member certifying they are providing the substantial support for the Legal Ward Child.
- The child ***must be <u>residing</u>*** in the member's home.

Note: A legal ward is defined as any person, under the age of 21, whom the court has awarded a guardian. A legal ward does not need to be a family relative of the guardian

Continued on next page

Questionable Dependent/PPC Legal Approval, Continued

Incapacitated Child

REQUIRED FORMS

- Direct Access BAH/Dependency Data Report with incapacitated child listed.
- CG-2020, Dependency Worksheet
- Current medical analysis of the child indicating this child's incapacitation - The analysis must indicate the child is incapable of self-care, either physically or mentally.
- CG-2020A, Support Statement ***OR*** a Notarized Statement from the member certifying they are providing substantial support for the incapacitated Child.
- Record of member carrying the incapacitated child as a dependent before the child's 23rd birthday

Illegitimate Child (Member father does not have physical custody of child)

REQUIRED FORMS

- Direct Access BAH/Dependency Data Report with illegitimate child listed.
- CG-2020, Dependency Worksheet
- CG-2020A, Support Statement
- Certified birth certificate showing both parents names. If member is not listed on the birth certificate, a notarized statement, from the member, certifying he is the biological father of the child is required.
- Proof of Support (cancelled checks, money orders, receipts, withholding orders, or voluntary allotments). The person who has physical custody of the child must be the recipient of the support *and* support must be solely for said child.

NOTE The SPO approves the dependent when the member has physical custody of the child. *PPC Legal approval is only required for an illegitimate child who is NOT in the physical custody of the member*

Continued on next page

Questionable Dependent/PPC Legal Approval, Continued

Parent/Parent-In-Law

REQUIRED FORMS:

- Direct Access BAH/Dependency Data Report with parent/parent-in-law listed.
- CG-2020, Dependency Worksheet. The current mailing address for the parent/parent-in-law must be included on this form.
- CG-2020A, Support Statement

NOTE PPC Legal will send a CG-1758 (Parent Dependency Affidavit) to the parent/parent-in- law. Once completed, it will need to be signed, notarized and returned to PPC Legal. An eligibility determination cannot be made until the completed CG 1758 is returned.

In Loco Parentis

REQUIRED FORMS:

- Direct Access BAH/Dependency Data Report with in loco parentis listed
- CG-2020, Dependency Worksheet. The current mailing address for the in loco parentis must be included on this form.
- CG-2020A, Support Statement
- Notarized statement from the requesting in loco parentis certifying the member lived with them for at least 5 years before the member's 21st birthday.

NOTE (In order for a person to be considered in loco parentis, he or she must have intentionally assumed the rights and duties of a parent for the member.)

Foreign Marriages/ Foreign Divorces

REQUIRED FORMS:

- Direct Access BAH/Dependency Data Report with spouse listed.
- CG-2020A, Support Statement
- Certified copy of the original marriage/divorce certificate. If the foreign marriage/divorce certificate is in a foreign language, a certified English translation is required.

NOTES: All Foreign marriages require PPC Legal approval. Any claim involving remarriage of a member following a foreign nation divorce requires PPC Legal approval. Marriages by proxy, telephone, common-law and remarriage within prohibited period following divorce are all considered cases of doubtful relationship and require PPC Legal approval. When in doubt, consult *Coast Guard Pay Manual, COMDTINST M7220.29 (series).*

PPC SPO Manual

Part III, General Transactions

Chapter 5, Disciplinary Actions

Overview

Introduction

This guide provides the procedures for navigating the Disciplinary Actions component in Direct Access.

Contents

This section covers the following Topics

Topic	See Page
Disciplinary Actions	III-5-3
Completing the Disciplinary Action Tab	III-5-7
Completing the Action Taken Tab	III-5-11
Completing the Disciplinary Results Tab	III-5-15
Completing the Fines and Forfeitures Tab	III-5-17
Completing the Rate Adjustment Tab	III-5-19
Completing the Miscellaneous Information Tab	III-5-21
Printing Disciplinary Actions	III-5-23

Disciplinary Actions

Introduction:

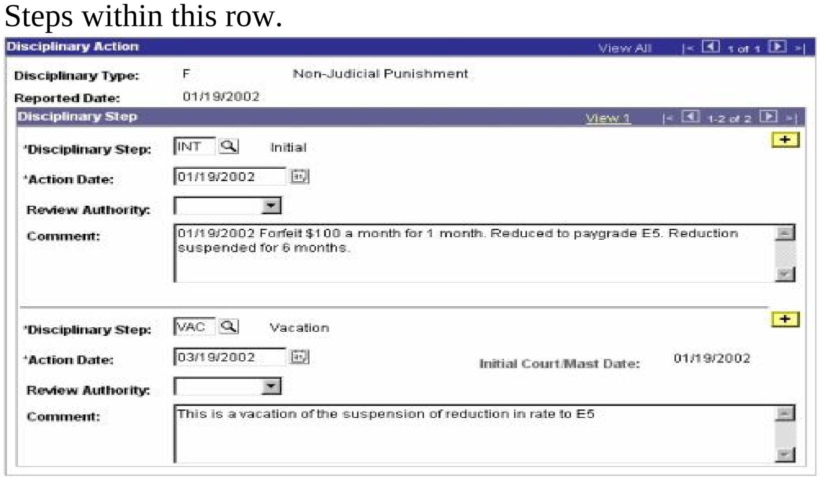
The Disciplinary Action page is used to submit NJP results from a Captain's Mast or Courts-Martial conviction on a member. This page is also used if a suspended punishment is vacated, punishment is being modified or punishment is affirmed. This page should not be used if the charges are dismissed or dismissed with warning at a Captain's Mast or Courts-Martial.

Note: See Section 10.B.3 of the Personnel & Pay Procedures Manual, PPCINST M1000.2(series) for additional information when a member is sentenced to confinement for over 90 days or to confinement with an unsuspended punitive discharge approved by the convening authority.

Before You Begin:

The Disciplinary Action page contains historical information in addition to being used for entering new data. Multiple scroll areas *(A scroll area behaves like a grid, in that each occurrence represents one row of data in the database. You'll notice, however, that within a scroll area the fields are randomly arranged rather than setup like a spreadsheet. These field groupings, although not physically displayed in a row, should still be considered as rows of data in the database.)* are used to display data. Use the View All links to view historical information. Use the Add New Row (+) button to insert new rows of data.

In the example below, we see the results of the initial NJP entry dated 01/19/02. Clicking the + allowed us to enter the vacation of suspension on 03/19/02. Note how the records are nested, the member has one Disciplinary Action row, but there are multiple Disciplinary Steps within this row.



Continued on next page

Disciplinary Actions, Continued

Modifications, Vacations, Corrections, and Deletions, etc.

Once a new disciplinary action has been entered and saved you should go directly to the Action Taken tab to make any changes to the record. If you are entering an Affirmation, Correction, Deletion, Modification or Vacation you must first click the + button in the Action Taken tab to insert a new row. Complete the Action Taken and the other tabs (Results, Fines, Rate Adjustments, etc) with the corrected or updated information. If the Disciplinary Action needs to be removed from Direct Access, please enter a deletion transaction first and then notify PPC Customer Care so that all background data can be removed before attempting to reenter the transaction.

Be sure to open each tab on these types of transactions and renter the original data and enter the changed data on every tab. For example, when entering a Vacation of Suspension you must complete the Rate Adjustment Tab, even if the reduction in rate is not vacated (be sure to leave the "Execute this Rate Adjustment" block unchecked in these cases).

Warning:

Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors (e.g. Amount is $1000.00 when you meant $100.00). Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.

CAUTION: When entering an initial disciplinary action, correction, vacation or deletion, ensure ALL Tabs are filled out completely prior to clicking the SAVE button. Only ONE save is allowed per disciplinary action transaction.

Continued on next page

Disciplinary Actions, continued

Procedure: Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Home > Administer Workforce > Manage Labor Relations (GBL) > Use > **Disciplinary Action** Enter the member's employee ID and click the Search button. When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. The search will select the member's uniformed employee classification. If the member does not have a uniformed employee classification, the search will return the message, "no matching value found".
2	The Disciplinary Action page will display.  There are six tabs on the page to complete. Refer to the topics below for help on each tab. **Ensure you complete ALL Tab's before saving.** • **Disciplinary Action** • **Action Taken** • **Disciplinary Results** • **Fines/Forfeitures** • **Rate Adjustment** • **Misc Information** **Note:** Once an **Initial** disciplinary action has been entered you should go directly to the Action Taken tab to make any changes to the record. If you are entering an Affirmation, Correction, Deletion, Modification or Vacation you must first click the + button in the Action Taken tab to insert a new row. Complete the Action Taken and the other tabs (Results, Fines, Rate Adjustments, etc) with the corrected or updated information.
3	Once the disciplinary action is entered, follow the **Printing Disciplinary Actions** instructions to print and distribute the transaction log.

Completing the Disciplinary Action Tab

Introduction

This section provides instructions for completing the Disciplinary Action Tab. This page is used only when initially reporting a new disciplinary action. Corrections, deletions, affirmations, etc. are entered on the Action Taken and other tabs. Once a new disciplinary action has been entered and saved you should go directly to the Action Taken tab to make any changes to the record. If you are entering an Affirmation, Correction, Deletion, Modification or Vacation you must first click the + button in the Action Taken tab to insert a new row. Complete the Action Taken and the other tabs (Results, Fines, Rate Adjustments, etc) with the corrected or updated information (you must re-complete every tab even if the data on a particular tab hasn't changed from the original transaction).

Procedure

If the member has no prior disciplinary action entries, the page will open with a new blank row. If there are previous entries, you must first click the + button to add a new row. Complete the data fields as indicated below.

Only add a new row on this tab if you are completing a new initial entry. **Do not add a new row on this tab if you are entering a modification, affirmation, correction, deletion or vacation of an existing entry.** These events are started by entering a new row on the Action Taken tab. Once a new disciplinary action has been entered and saved you should go directly to the Action Taken tab to make any changes to the record. If you are entering an Affirmation, Correction, Deletion, Modification or Vacation you must first click the + button in the Action Taken tab to insert a new row. Complete the Action Taken and the other tabs (Results, Fines, Rate Adjustments, etc) with the corrected or updated information.

Continued on next page

Completing the Disciplinary Action Tab, Continued

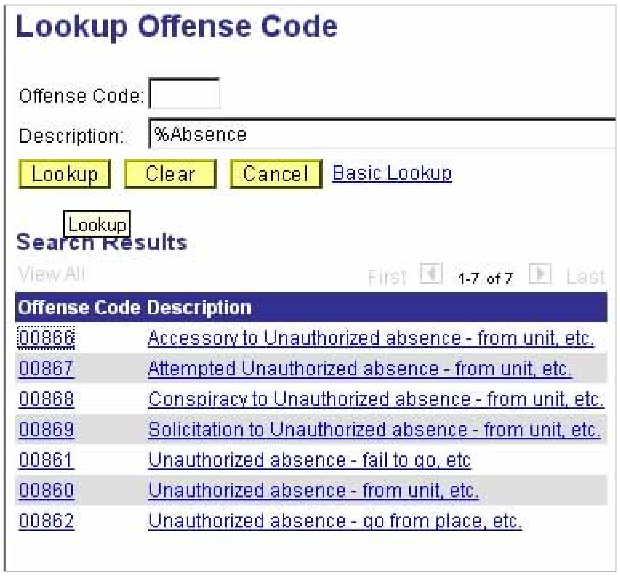
Procedures (con't)

Field	Action
Type	Enter "F" for CO's NJP or click on the to lookup the code for the type of court 
Reported Date	Enter the date that the Captain's Mast/Courts-Martial was held. Date format is MM/DD/YYYY (all numeric). Use the icon to lookup a date if desired. This date must be the same as the **Action Date** (see Completing the Taken Tab) for an initial NJP. It may 14 days earlier than the **Action Date** for a Courts-Martial.
Description	In abbreviated terms, give a brief description of the offense(s), including the time(s) and dates(s), as stated on the CG-4910, for which non-judicial punishment was imposed or for which the member was found guilty at Courts-Martial.

Continued on next page

Completing the Disciplinary Action Tab, Continued

Procedures (con't)

Field	Action
Offence Code	Press for a valid list of coded offenses.  The following rules apply: • If the member was charged with Accessory of an offense, then the last number of the Coded Offense would be 6. • If the member was charged with Attempt of an offense, then the last number of the Coded Offense would be 7. • If the member was charged with Conspiracy, then the last number of the Coded Offense would be 8. • If the member was charged with Solicitation of an offense, then the last number of the Coded Offense would be 9. Use the + to add rows Enter up to three valid Coded Offenses.  • If there are more than three Coded Offenses on the member, list the three most serious ones.

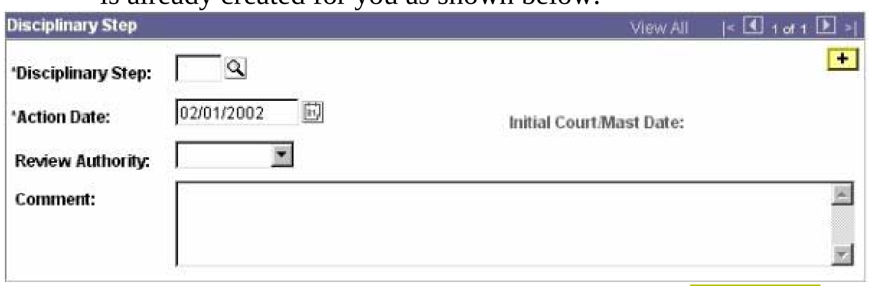
Completing the Action Taken Tab

Introduction

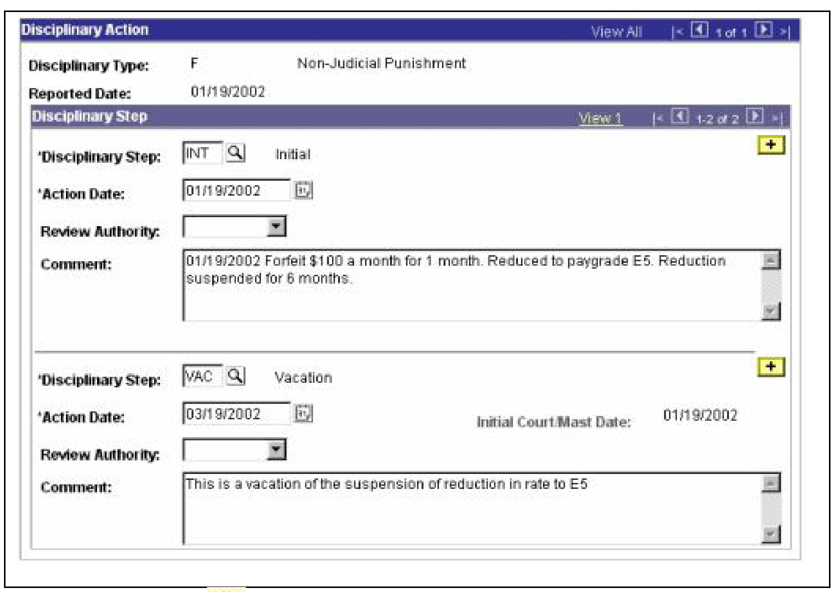
This section provides instructions for completing the Action Taken Tab.

- If you are entering an Affirmation, Correction, Deletion, Modification or Vacation you must first click the [+] button in the Initial Action row to insert a new row. Complete the Action Taken and the other tabs (Results, Fines, Rate Adjustments, etc) with the corrected or updated information. Note: You must re-complete every tab even if the data on a particular tab hasn't changed from the original transaction.

- If your are completing an initial entry the tab will with a new blank row, as shown below. Do not click the [+] button, as a new blank row is already created for you as shown below:



Previous entries and steps can be viewed by clicking Include History and the View All links as shown in this example:



Always use the [+] in the **Initial Action** row to start a correction, deletion, etc. Clicking the [+] in one of the other rows (the Vacation row for example) will result in an error when you try to save it.

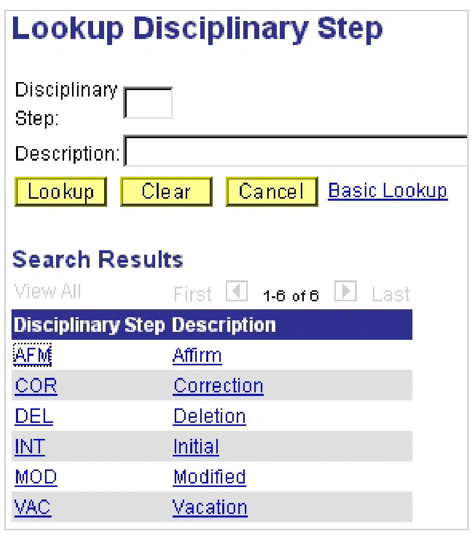
Continued on next page

Completing the Action Taken Tab, Continued

Note: **Be sure to change the Action Date when inputting a Vacation, Modification, Deletion, Correction, or Affirmation this will allow you access to the Comment block and fields on other tabs.**

Procedure Complete the data fields as indicated below.
*If entering anything other than an **initial entry**, you must first click* Include History *and the* View All *links then the* + *button (in the initial entry row) to enter a new row.*
If you are entering an Affirmation, Correction, Deletion, Modification or Vacation you must first click the + button to insert a new row. Complete the Action Taken and the other tabs (Results, Fines, Rate Adjustments, etc) with the corrected or updated information.

<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Disciplinary Step</td><td>Enter the code for type of action. Use the icon to lookup codes.



Note: If entering anything other than an initial entry, you must first click Include History and the View All links then the + button (in the initial entry row) to enter a new row.

If you are entering an Affirmation, Correction, Deletion, Modification or Vacation you must first click the + button to insert a new row. Complete the Action Taken and the other tabs (Results, Fines, Rate Adjustments, etc) with the corrected or updated information.</td></tr>
</table>

Continued on next page

Completing the Action Taken Tab, Continued

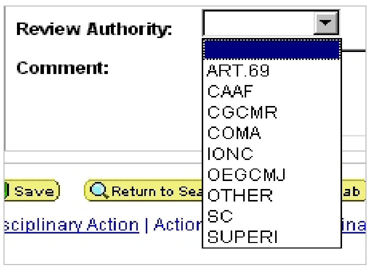
Procedures (con't)

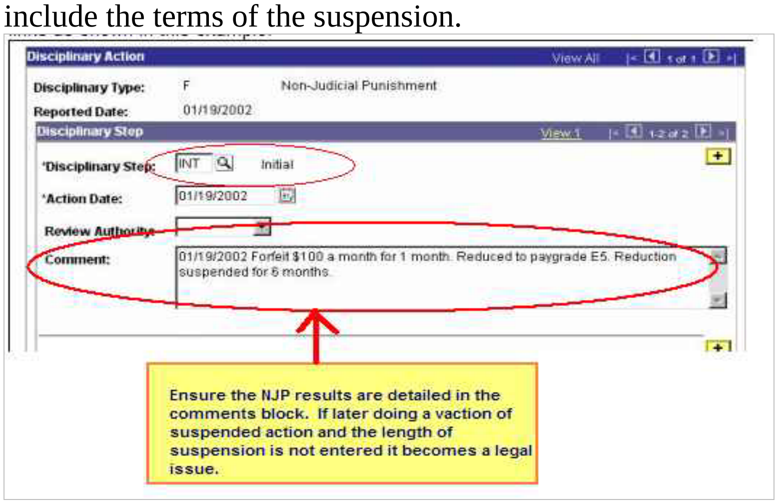
Field	Action
Disciplinary Step (con't)	<table><tr><th>Step</th><th>Usage</th></tr><tr><td>**AFM**</td><td>The **Affirm** step is used for courts-martial only. It should be used whenever either of the following circumstances occur: • The officer exercising general courts-martial jurisdiction or an Article 69 UCMJ examination approves the findings and sentence without modification. • The U.S. Coast Guard Court of Military Review; the U.S. court of Military Appeals; or the U.S. Supreme Court affirms the findings and sentence without modification, and the conviction becomes final and conclusive.</td></tr><tr><td>**COR**</td><td>The **Correction** step is used when a transaction has been submitted with erroneous data, or was incomplete.</td></tr><tr><td>**DEL**</td><td>The **Deletion** step is used when a higher reviewing authority sets aside the entire conviction or the transaction was submitted on the wrong member. It can also be used to deletion a transaction when a correction is not possible.</td></tr><tr><td>**INT**</td><td>The **Initial** step is for the first time submission of a punishment awarded.</td></tr><tr><td>**MOD**</td><td>The **Modified** step is used when a superior officer acts favourably on an appeal and authorizes a change in the punishment originally awarded. Punishment modifications can include a remission of the remaining punishment, a reduction in the severity of the punishment through mitigation, or the punishment set aside in whole or in part.</td></tr><tr><td>**VAC**</td><td>The **Vacation** step is used when a previous punishment was suspended and now is to be executed.</td></tr></table>
Action Date	Enter the date that the punishment is to take effect. • For an NJP the **Reported Date** (see Completing the Disciplinary Action Tab) and the **Action Date** must be the same. • For a Court Martial the **Action Date** may be 14 days later than the **Reported Date** (see Completing the Disciplinary Action Tab). • Note: Be sure to change the Action Date when inputting a Vacation, Modification, Deletion, Correction, or Affirmation this will allow you access to the Comment block and fields on other tabs. The **Action Date** is the effective date for the JUMPS transaction. **Warning! The date will default to the current date, be sure to change it to the correct date before saving.**

Continued on next page

Completing the Action Taken Tab, Continued

Procedures (con't)

<table>
<tr><th>Field</th><th>Action</th></tr>
<tr><td>Review Authority</td><td>Choose the review authority from the drop-down menu or leave blank in not applicable (e.g. action type is Initial or Vacation)


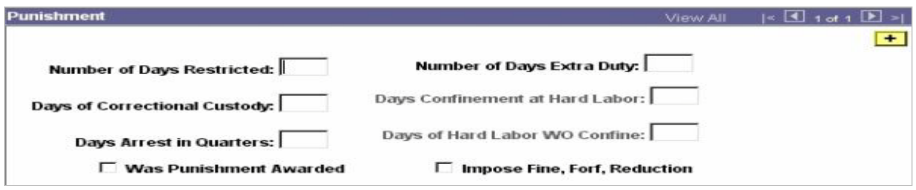
ART.69 = Action of higher authority pursuant to Article 69, UCMJ.
CAFF =
CGCMR = U.S. Coast Guard Court of Military Review
COMA = U.S. Court of Military Appeals
IONC =
OEGCMJ = Officer Exercising General Courts-Martial Jurisdiction
OTHER =
SC = U.S. Supreme Court
SUPERI=</td></tr>
<tr><td>Comment</td><td>Give the date the punishment was awarded, followed by a complete description of the punishment imposed as pronounced by the court in abbreviated terms. If any of the punishment is suspended, so state, and include the terms of the suspension.


Ensure all awarded punishment results are listed in the comment block.</td></tr>
</table>

Completing the Disciplinary Results Tab

Introduction This section provides instructions for completing the Disciplinary Results Tab.

Procedure Complete the data fields as indicated below.

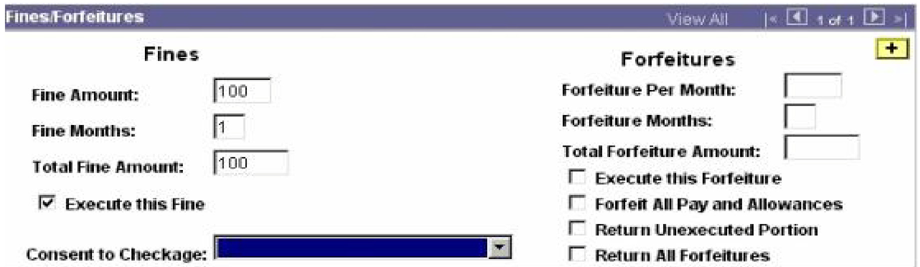


Step	Action
Number of Days Restricted	If restriction was imposed, enter the number of days restriction was awarded.
Days of Correctional Custody	If correctional custody was imposed, enter the number of days correctional custody was awarded. Note: Correctional Custody shall not be imposed onE-4s and above unless an unsuspended reduction to E-3 is imposed.
Days Arrest in Quarters	If arrest in quarters was imposed, enter the number of days arrest in quarters was awarded. Note: Arrest in quarters may not be imposed in combination with restriction and cannot be imposed on enlisted members.
Was Punishment Awarded	Check this box if the member was awarded any type of punishment (suspended or not suspended).
Number of Days Extra Duty	Enter the number of days extra duty if member was awarded this punishment.
Days Confinement at Hard Labor	Enter the number of days confinement at Hard Labor if member was awarded this punishment (not used for NJP, courts-martial only).
Days of Hard Labor WO Confine	Enter the number of days confinement at Hard Labor without confinement if member was awarded this punishment.
Impose Fines, Forf, Reduction	If the member was awarded a forfeiture, reduction in rank and/or fine and either of these three are being executed (i.e., not being suspended) then this field should be checked.

Completing the Fines and Forfeitures Tab

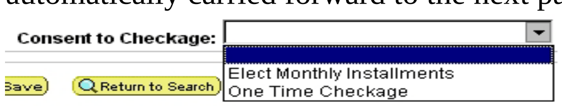
Introduction

This section provides procedures for completing the Fines and Forfeitures Tab.



Procedure

Complete the data fields as indicated below.

Field	Action
Fine Amount	Courts-Martial only, not used with NJP. If a fine was imposed on the member, enter the amount of the fine (rounded down to the nearest whole dollar), e.g., $2000.50 would be 0002000.The following rules apply: • If the entire fine is suspended, then enter the amount in this field. • If all of the fine is being executed and not suspended, then enter the amount in this field. • If a portion of the fine will be executed, then only enter the amount that will be executed.
Fine Months	If member elects to pay the fine via monthly installments, then enter the number of months approved. If fine is a one time checkage then enter 1.
Total Fine Amount	Enter the total amount of the fine (Fine Amount * Fine Months)
Execute This Fine	If any or the entire fine, is being executed then check this field, otherwise leave it blank. *Note:* If this transaction is being created to vacate a suspended fine then check this field.
Consent to Checkage	Click the drop -down menu and chose "Elect Monthly Installments" if member elects to pay the fine via monthly installments. Select "One Time Checkage" if member elects payment via a one-time checkage for the total amount. Note: Should the fine be too large to be deducted from a member's pay in a single pay period, the unpaid portion of the fine will be automatically carried forward to the next pay period. 

Continued on next page

Completing the Fines and Forfeitures Tab, Continued

Procedures (con't)

Calculating Forfeitures

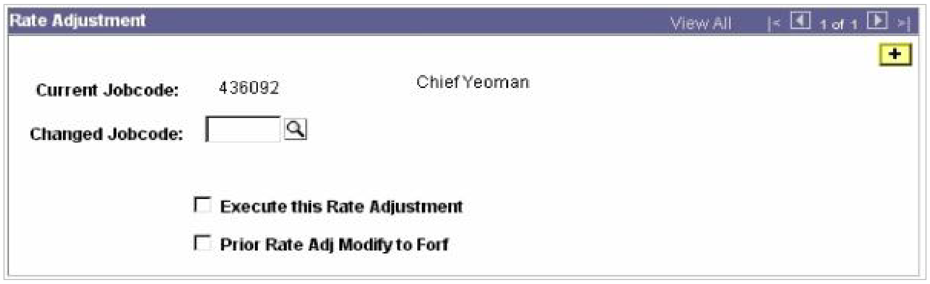
If NJP includes both reduction in grade and forfeiture of pay, the forfeiture must be based on the grade to which the member has been reduced. <u>This is true even if the reduction is suspended.</u> When entering a Reduction in Grade and a Forfeiture of Pay, ensure that the pay scale used to calculate the forfeiture amount is based on the Grade to which reduced. Example: Member is reduced from E-5 to E-4 and has a forfeiture of 1/2 months pay for 2 months; Use the E-4 pay scale to determine the forfeiture amount. Also, do not include any future pay raises in the calculation. All punishments awarded are based on the pay entitlements that are in effect on the date of NJP.

Field	Action
Forfeiture per month	If forfeiture was imposed on the member, enter the amount of forfeiture (rounded down to the nearest whole dollar), e.g., $200.50 would be 00200.The following rules apply: • If all of the forfeiture is suspended, then enter the amount in this field. • If all of the forfeiture is being executed and not suspended, then enter the amount in this field. • If a portion of the forfeiture will be executed, then only enter the amount that will be executed.
Forfeiture Months	Enter the number of months that was imposed on the forfeiture.
Total Amount Forfeiture	Total amount forfeited (Forfeiture Amount * Forfeiture Months)
Execute this forfeiture	Check this filed if the forfeiture is not suspended or if you are changing a previously imposed forfeiture of pay (this transaction is being submitted to record that the amount of forfeiture of pay has been reduced by appellate authorities). If not submitting this transaction for changing a previous imposed forfeiture then leave this field blank.
Forfeit all pay and allowances	Check this field if a total forfeiture of all pay and allowances is awarded to the member.(If Suspended for any period of time on initial submission DO NOT check, leave blank').Note: If forfeiture is awarded but suspended, insure the information concerning the suspension and period of time is included in the narrative block). **This block is not used if the action type is Initial.**
Return unexecuted portion	Check this field if preparing this transaction to report that the unexecuted portion of a forfeiture or fine is to be returned. **This block is not used if the action type is Initial.**
Return all forfeitures	Check this field if preparing this transaction to report that all pay and allowances lost to forfeiture or fine are to be returned. **This block is not used if the action type is Initial.**

Completing the Rate Adjustment Tab

Introduction

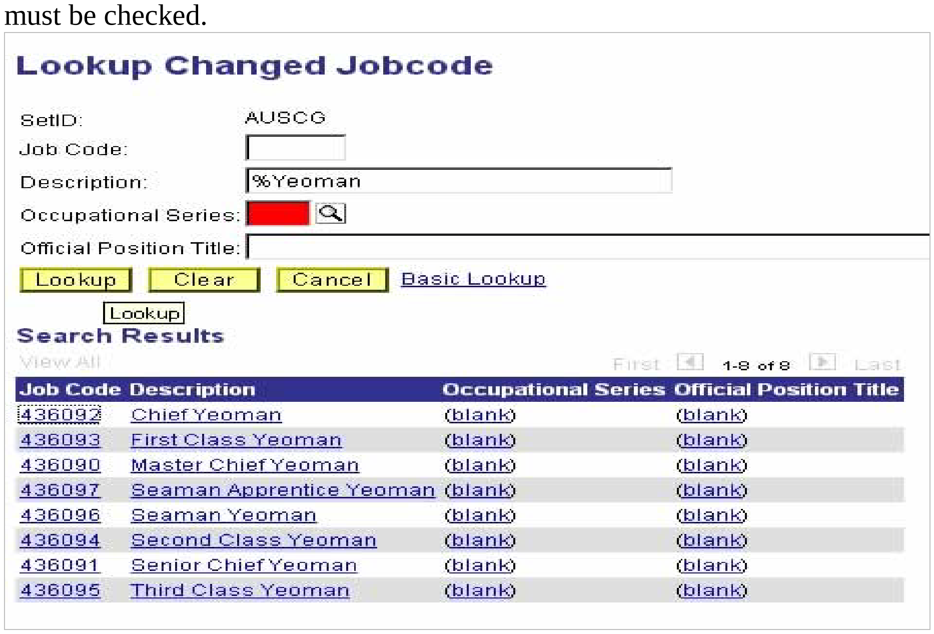
This section provides instructions for completing the Rate Adjustment Tab.



Procedure

When entering a Vacation of suspension you must complete this tab, even if the reduction in rate is not vacated (be sure to leave the "Execute this Rate Adjustment" block unchecked in these cases). Complete the data fields as indicated below.

Field	Action
Changed Jobcode	If the member was awarded a **reduction** in rate, enter the corresponding job code. Click the 🔍 icon to lookup job codes. Note: This field should be entered even if the reduction was suspended. If the member is being **restored** in rate, then this field must reflect the rate the member is being restored to and the "**Execute this Rate Adjustment**" box must be checked.



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Completing the Rate Adjustment Tab, Continued

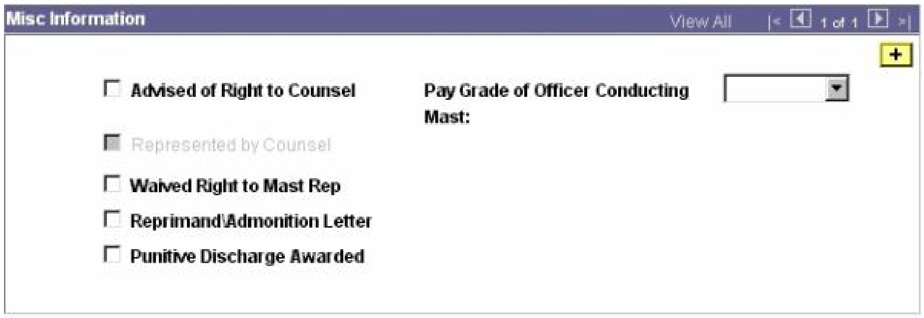
Procedures (con't)

Field	Action
Execute this Rate Adjustment	If the member was awarded a reduction in rate and it is being executed (i.e., not being suspended) then this field should be checked. If the member is being restored in rate, then this field must be checked (e.g. "Yes").
Prior Rate Adj Modify to Forf	Check this field if reporting that a **previously authorized rate** adjustment has been modified to forfeiture (i.e., member was initially reduced in rank, but now the reduction in rank is being restored and a forfeiture of pay will occur). Example: Member reduced to YN3 at CO's NJP on 4 Jan 08. On 4 April 2008 the CO elects to restore the member to YN2. However, the CO does not want the member to receive the difference in pay from E4 to E5 during the time the member was serving as a YN3. In this case, the difference in pay will be converted to a forfeiture. The member's date rate and pay grade will be restored to what they were prior to the reduction, but the effective date of the pay increase will be 4 April.

Completing the Miscellaneous Information Tab

Introduction

This section provides instructions for completing the Miscellaneous Information Tab.



Procedure

Complete the data fields as indicated below.

Field	Action
Advised of Right to Counsel	Check this field to indicate the member was advised of their right to counsel. This field is only applicable when NJP is imposed on members assigned to shore units. This field should be checked only if the member's signature is on an "Acknowledgment of Rights-Acceptance of NJP" form. This form, if executed, should have been attached to the CG-4910.
Pay Grade of Officer Conducting Mast	Click the drop-down menu and choose the pay grade of the officer/oic conducting the mast. NJP only field.
Represented by Counsel	Check this field if in the record of trial by summary Courts-Martial that the member was represented by counsel.
Waived Right to Mast Rep	Check this field if the member waived the right to have a representative present at CO's NJP. NJP only field.
Reprimand Admonition Letter	Check this field if the member was awarded a letter of reprimand or admonition.
Punitive Discharge Awarded	Check this field if the member was awarded a punitive discharge. Courts-Martial only field.

Continued on next page

Completing the Miscellaneous Information Tab, Continued

Procedures (con't)

Field	Action
Save 	**Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors (e.g. Amount is $1000.00 when you meant $100.00). Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.** CAUTION: When entering an initial disciplinary action, correction, vacation or deletion, ensure ALL Tabs are filled out completely prior to clicking the SAVE button. Only ONE save is allowed per disciplinary action transaction. Click the Save button to submit the disciplinary action.

Printing Disciplinary Actions

Introduction

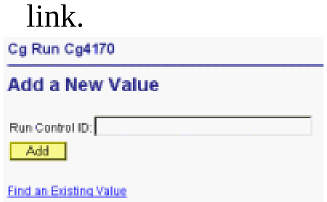
This section provides procedures for printing a record of disciplinary action. The PeopleSoft Disciplinary Action printout replaces the SDII Court Memorandum transaction log. Per COMDTINST M1080.10 (series), Military Personnel Data Records (PDR) System, file the Disciplinary Action printout in Section 2 of the SPO PDR and send a copy to CGPSC (psd-mr/adm-3).

Printing reports on separated members is not supported

Be aware that you cannot print / re-print a Disciplinary Actions Report after a member has been discharged. Once discharged, you may only view the Disciplinary Action on the member.

Procedure

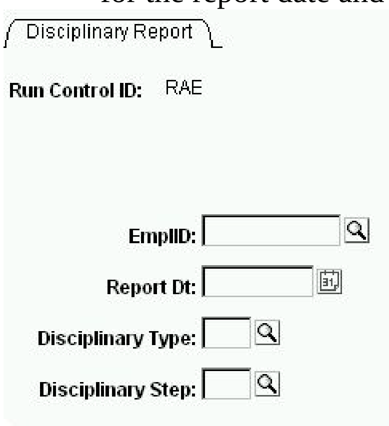
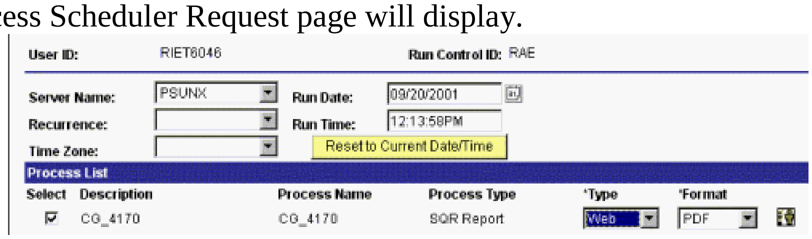
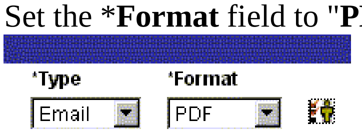
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Home > Administer Workforce > Manage Labor Relations (GBL) > Report > **Disciplinary Report**
2	The Run Control ID Entry Page will appear. • **If you have used this process before**, enter your initials in the Run Control ID block and click the Search button. • If this is the first time you have used this process, click the Add a New Value link.  1. Enter your initials in the Run Control ID block. 2. Click the Add button.

Continued on next page

Printing Disciplinary Actions, Continued

Procedures (con't)

Step	Action
3	The Disciplinary Report page will display. 1. Enter the following information: • Employee ID Number (**EmplID**) • Report Date (**Report Dt**) (must match the date entered on the Disciplinary Action Tab • Disciplinary Action Type Code (**Disciplinary Type**) (must match the type code entered on the Disciplinary Action Tab • Disciplinary Step (must match the step entered on the Action Taken Tab for the report date and type entered above).  2. Click the  button to begin processing.
4	The Process Scheduler Request page will display.  In the **Server Name** field, click the drop-down menu and choose **PSUNX**. Change the ***Type** field to "**Email**". (This procedure only covers the email option, click here, if you would like information on the web option). Set the ***Format** field to "**PDF**". 

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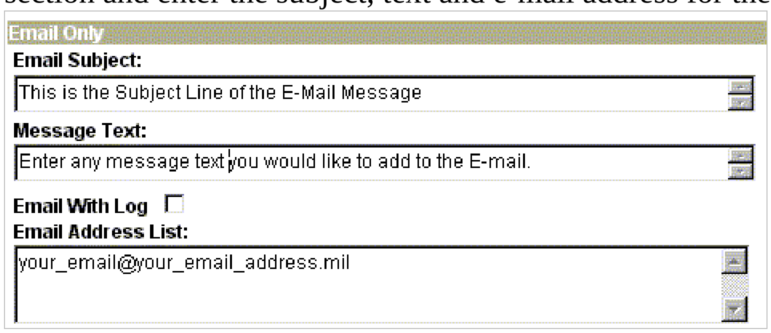
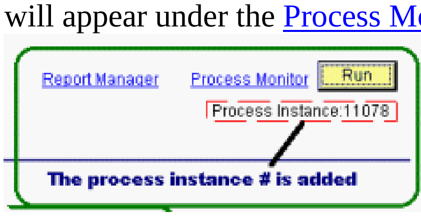
Printing Disciplinary Actions, Continued

Procedures (con't)

Step	Action
4 (con't)	If you selected **Email** you can click on the Distribution icon to add additional addresses and customized the email message. This step is not necessary if you have your business email address entered in the system, the report will automatically be mailed to your business email address. Use this feature if you want to email the report to other addresses. The Distribution Detail page will display, scroll down to the **E-Mail Only** section and enter the subject, text and e-mail address for the message:  Insert additional email addresses in the **Email Address List** box. Separate entries with a (;) e.g. "john.q.yeoman@uscg.mil;jane.s.chief@uscg.mil. Warning: Do not use a non USCG.MIL/DHS.GOV address as your **business** email address or in the Email Address List field of the Process Scheduler Request. Directing system-generated emails to personal accounts hosted by internet service providers is prohibited. To ensure compliance, always select "Web" from the **Type** menu. Click OK to continue. You will be returned to the Process Scheduler Request page. Click OK on the Process Scheduler Request page.
5	The Disciplinary Report page will display again. A "Process Instance" number will appear under the Process Monitor link  If you selected "**Email**" for the type, you may exit the application. The Disciplinary Report should arrive via e-mail within a few minutes.

PPC SPO Manual

Part III, General Transactions

Chapter 6, General Absences

Overview

Introduction

The General Absences page is used to report non-leave absences. Non-leave absences include:

- Absence Due to Misconduct
- Civilian, Foreign, or Military Confinement
- Incompetence
- Desertion
- Missing
- Unauthorized Absence

Incompetence absence type transactions are input by PSC, Topeka and are not discussed in this chapter

Policies and Procedures

Policies for recording each of the above types of absences are discussed in the following sections.

1. Absence Due to Misconduct (Absence Type “ADM”)
2. Confinement (Absence Types “CIV”, “FGN”, “MCV” or “MIL”)
3. Desertion (Absence Type “DSR”)
4. Member Missing (Absence Type “MSG”) “UA”)
5. Unauthorized Absence (Absence Type

Procedures:

6. General Absence Data Entry Procedure

General Absence Approval Procedure

Approval

Supervisor (CGHRSUP Role User) approval is required for all General Absences. The system does not generate an e-mail or make a Worklist entry for supervisor notification. The data entry technician (CGHRS Role User) **must inform the supervisor when the transaction is ready for approval**.

Before You Begin

Use actual dates and times other than 2359. Once a General Absence row is approved, only supervisors or PSC can make corrections or deletions. Corrections are not allowed to the START date once approved (delete and resubmit with correct start date) but are allowed for all other fields.

Begin absence and end absence transactions may be submitted separately or both at the same time.

Continued on next page

Overview, Continued

Contents

This Chapter contains the following topics.

Topic	See Page
Absence Due to Misconduct (Absence Type “ADM”)	III-6-3
Confinement (absence Types “CIV”, “FGN”, “MCV”, or “MIL”)	III-6-5
Desertion (Absence Type “DSR”)	III-6-7
Member Missing (Absence Type “MSG”)	III-6-9
Unauthorized Absence (Absence Type “UA”)	III-6-11
General Absence Data Entry Procedure	III-6-13
General Absence Approval Procedure	III-6-17

Absence Due to Misconduct (Absence Type "ADM")

Introduction

This section discusses the Absence Due to Misconduct type transaction.

Trigger

Submit a General Absence transaction following receipt of a determination that a member's absence was due to an illness caused by and immediately following misconduct or intemperate use of alcoholic liquors or habit-forming drugs.
Use the Absence Type Code –"ADM" when submitting this transaction.

Reference

Please review the following references before submitting an Absence Due to Misconduct type transaction.

(a) CG Pay Manual, COMDTINST M7220.29(series), Chapter 2
(b) CG Administrative Investigations Manual, COMDTINST M5830.1(series), Chapter 5

Additional Information

Members absent due to illness caused by and immediately following misconduct or intemperate uses of alcoholic liquors or habit-forming drugs do not forfeit pay or allowances during such absence. However, the absence is considered deductible time.

Procedure

Please see the General Absence Data Entry Procedure on page III-10-13.

Confinement (absence Types "CIV", "FGN", "MCV", or "MIL")

Introduction

This section discusses the Confinement absence type transaction.

Trigger

Submit a General Absence transaction to report that a member has been placed in or released from confinement by military or civil authorities. Also, use this transaction to report members who are serving sentences under "Work Release" programs. Submit this transaction each week (corresponding to the confinement dates) to report the deductible time and to adjust base dates accordingly).

Reference

Please review the following references before submitting a Confinement type absence transaction.

(a) Personnel and Pay Procedures Manual, PSCINST M1000.2 (series)
(b) Pay Manual, COMDTINST M7220.29 (series)
(c) CG Personnel Manual, COMDTINST M1000.6(series), Chapter 8-A
(d) Manual for Courts-Martial (MCM)
(e) Military Justice Manual, COMDTINST M5810.1 (series)

Additional Information

Members sentenced to confinement of less than 90 days shall normally be placed in a TDY status for the duration of confinement unless the sentence includes an unsuspended punitive discharge or it is unlikely that the member will be ordered to return to his or her parent command after release from confinement.

If the member is sentenced to confinement of 90 days or more or is sentenced to confinement and the convening authority approves an unsuspended punitive discharge, the member will be administratively assigned to the correctional facility and the records will be maintained by PSC Topeka. A member, sentenced to less than 90 days of confinement, may be administratively assigned if the assignment authority considers it unlikely that he or she will be ordered to return to his or her parent command after release from confinement.

In cases where the member is to be administratively assigned orders must be issued by CGPC. The member's SPO must contact the CGPC Assignment Officer or Central Assignment Coordinator and inform them when a member's sentence to confinement will result in administrative assignment. The orders will assign the member (PCS) to the correctional facility. The member's SPO must complete the orders and the PCS departing and reporting endorsements and forward the records to PSC Topeka.

Continued on next page

Confinement (absence Types "CIV", "FGN", "MCV", or "MIL"), Continued

Additional Information (con't)

See the PCS Travel Order topic for information on completing orders. See the PCS Departing and PCS Reporting topics for information on completing endorsements.

Note: If the member is being placed in civilian or military pretrial confinement, no administrative assignment is necessary. The member's SPO remains the same while in pretrial confinement.

Absence Type Code to use:

There are several Absence Type codes for Confinement. Refer to this table to select the correct code:

Code	Use When Member is Confined to	Effect on Pay
CIV	Civilian facility under control of civil authority	Suspends all pay and allowances
FGN	Military facility under control of foreign civilian authority	Suspends all pay and allowances
MCV	Military facility under control of civil authority	Suspends all pay and allowances
MIL	Military facility under military control	Continues payment of all pay and allowances. However, the SPO must enter stops of certain entitlements as described below: • A member in military confinement may lose entitlement to BAS, Hardship Duty Pay-Location, Career Sea Pay/Premium, or Diving Duty Pay. See Figure 3-2, 4-2, 4-4, and 4-5 of the CG Pay Manual for more information. • If a member will be in military confinement for over 31 days they lose their entitlement to SGLI at the end of the month in which the 31st day of such status is reached. See the Elections and Beneficiaries topic for procedures on entering an administrative stop to SGLI.

Procedure

Please see the General Absence Data Entry Procedure on page III-10-13.

Desertion (Absence Type “DSR”)

Introduction

This section discusses the Desertion absence type transaction.

Trigger

Submit a General Absence transaction when a member is declared a deserter and/or has returned from a deserter status.

Use the Absence Type Code –“DSR” when submitting this transaction.

Reference

Please review the following references before submitting a Desertion type absence transaction.

(a) CG Personnel Manual, COMDTINST M1000.6(series), Chapter 8-A
(b) CG Pay Manual, COMDTINST M7220.29(series), Chapter 2
(c) Personnel and Pay Procedures Manual, PSCINST M1000.2(series), Chapter 10-B

Additional Information

Information you need to know about this transaction:

Active duty pay and allowances: See chapter 2 of the CG Pay Manual for rules governing pay entitlements for a deserter.

Procedure

Please see the General Absence Data Entry Procedure on page III-10-13.

Member Missing (Absence Type "MSG")

Introduction

This section discusses the Member Missing absence type transaction.

Trigger

Submit a General Absence transaction following receipt of information that a member is missing, as defined in 11-A-4, CG Personnel Manual, COMDTINST M1000.6 (series), or has returned from a missing status.

Use the Absence Type Code –"MSG" when submitting this transaction.

Reference

Please review the following reference before submitting Member Missing absence type transaction.

(a) CG Personnel Manual, COMDTINST M1000.6 (series), 11-A-4

Additional Information

Other transactions may be required:

- **Active duty pay** and allowances will continue for regular Coast Guard members and reserve members on extended active duty. For regular and reserve members a Retained Beyond Normal Expiration of Enlistment (P176) transaction may also be required to extend expiration of enlistment (i.e, expected active duty termination date for active duty members and expected loss date for reserves).
- **For reserve members** on active duty for 140 days or more, it may be necessary to submit an Amend Reserve Expected Active Duty Termination Date (P191) transaction to extend the period of active duty authorized.
- **Determination of the member** to be, or has been UA, deserter, or dead, delete previously submitted declare member missing (P231) transaction and submit the appropriate transaction to reflect the member's status. The "declare member missing" and "return member from missing" transactions apply only when status of absence is determined to be missing.

Procedure

Please see the General Absence Data Entry Procedure on page III-10-13.

Unauthorized Absence (Absence Type "UA")

Introduction

This section discusses the Unauthorized Absence type transaction.

Trigger

Submit a General Absence transaction following receipt of information that a member has been on Unauthorized Absence (UA) for more than 24 hours and/or has returned from a UA status.
Use the Absence Type Code –"UA" when submitting this transaction.

Reference

Please review the following references before submitting an Unauthorized Absence type transaction.

(a) CG Personnel Manual, COMDTINST M1000.6(series), Chapter 8-C
(b) CG Pay Manual, COMDTINST M7220.29(series), Chapter 2
(c) Personnel and Pay Procedures Manual, PSCINST M1000.2(series), Chapter 10-B

Additional Information

Information you need to know about Unauthorized Absence:

- **Effective date and time** will be the effective date and time the unauthorized absence begins.
- **Pay and allowances will stop** when this transaction is submitted on a member.

Note: A member in pay grade E4 (with 4 years service or less) and below may be entitled to payment of two months BAH for support of dependents. See the Pay Manual, Chapter 3-D.

- **Declared a deserter.** If the member is declared a deserter on the same date and time the unauthorized absence begins, submit a General Absence transaction using Absence Type Code "DSR" to declare the member a deserter in lieu of the unauthorized absence. *See: Desertion (Absence Type "DSR") on page 6.*

Procedure

Please see the General Absence Data Entry Procedure on page III-10-13.

General Absence Data Entry Procedure

Introduction

This section provides the procedure for entering a general absence transaction. This procedure may be completed by “CGHRS” role users.

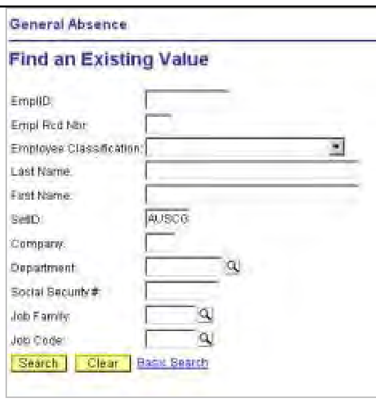
Before You Begin

Review the polices, in the preceding sections of this chapter, for the absence types before creating this transaction:

1. Absence Due to Misconduct (Absence Type “ADM”)
2. Confinement (Absence Types “CIV”, “FGN”, “MCV” or “MIL”)
3. Desertion (Absence Type “DSR”)
4. Member Missing (Absence Type “MSG”)
5. Unauthorized Absence (Absence Type “UA”)

Procedure

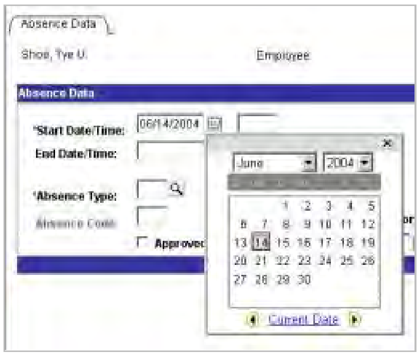
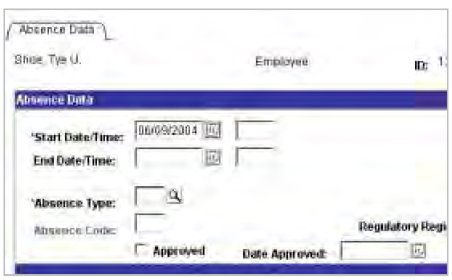
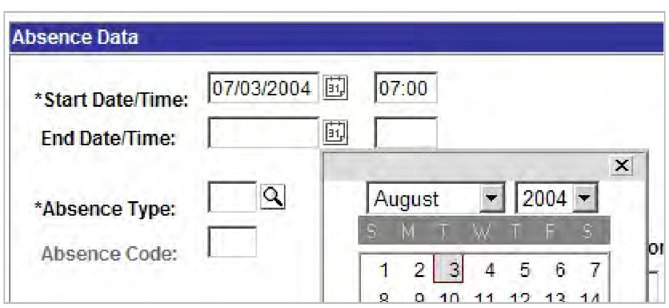
Follow these steps to enter a General Absence transaction:

Step	Action
1	Select the following menu items: **Administer Workforce** > **Monitor Absence (GBL) > Use > General Absence**
2	 Enter the Employee ID number into the **EmplID** field.
3	Click the **Search** button. Search
4	If the member has no previously reported General Absences, the page will open with a new blank row in which to enter data. If historical data (previous transactions) are present, you must insert a new blank row, unless you are reporting a return from missing (see below). Click the Add Row + button to create a new row. **Exception**: If you are reporting a member’s return from absence/confinement status, and the start absence transaction has already been submitted, you will work in the same row that was used to start the absence.

Continued on next page

General Absence Data Entry Procedure, Continued

Procedure (continued)

Step	Action
5	Enter the date the absence began in the Start Date field. 
6	Click in the **Start Time** field and enter the time the absence began (e.g. ‘0700’).
7	
8	If you are reporting the member’s return from absence/confinement, click in the **End Date** field and enter the date the member returned. 
9	If you are reporting the member’s return from absence/confinement, click in the **End Time** field and enter the time the member returned (e.g. ‘0700’).

Continued on next page

General Absence Data Entry Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>
Enter the Absence Type Code in the Absence type field or

1. Click the **Lookup Absence Type** button.
2. Click the Lookup button. Lookup Absence Type.
3. Click the desired Absence Description.

See the previous sections of this chapter for details on the using the Absence Types:

1. Absence Due to Misconduct (Absence Type “ADM”)
2. Confinement (Absence Types “CIV”, “FGN”, “MCV” or “MIL”)
3. Desertion (Absence Type “DSR”)
4. Member Missing (Absence Type “MSG”)
5. Unauthorized Absence (Absence Type “UA”)

Note: The Absence Type “*CMP-Competency*” can only be used by PSC Topeka.
</td></tr>
<tr><td>11</td><td>Click the Save button.
Note: See the Possible Error Message discussion on the following page if you cannot save the transaction.</td></tr>
<tr><td>12</td><td>Notify your supervisor (CGHRS Role User) that the transaction awaits his or her review and approval (the systems does not make a Worklist entry or e-mail notification of pending General Absence transactions.)

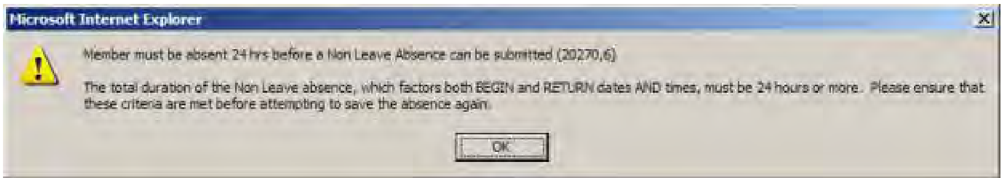
Supervisor Approval: See the General Absence Approval Procedure on page 13.</td></tr>
</table>

Continued on next page

General Absence Data Entry Procedure, Continued

Possible Error Message

(1) This message will appear if you attempt to save a transaction and the Start Date/Time is less than 24 hours before the **current date**.



- Verify the Start Date/Time, if it is correct, wait one day before submitting the transaction.

(2) The error message will also appear if the duration between the Start Date/Time and End Date/Time is less than 24 hours.

- Verify the Start Date/Time and End/Date Time; if they are correct and the elapsed time is less than 24 hours, no transaction is required.

General Absence Approval Procedure

Introduction

This section provides the procedure for approving a general absence transaction. Approval authority is limited to "CGHRSUP" role users.

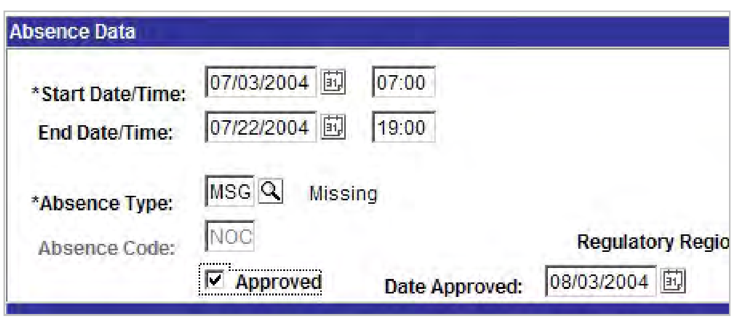
Before You Begin

Review the polices for the absence types before approving this transaction:
Absence Due to Misconduct (Absence Type "ADM")
Confinement (Absence Types "CIV", "FGN", "MCV" or "MIL")
Desertion (Absence Type "DSR")
Member Missing (Absence Type "MSG")
Unauthorized Absence (Absence Type "UA")

Procedure

Follow these steps to review and approve a General Absence transaction:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select the following menu items:

Administer Workforce > Monitor Absence (GBL) > Use > General Absence</td></tr>
<tr><td>2</td><td>Enter the Employee ID and click the search button.</td></tr>
<tr><td>3</td><td>Review the transaction, make any corrections that are necessary</td></tr>
<tr><td>4</td><td>Click the Approved check box (the date approved will auto fill with the current date)

</td></tr>
<tr><td>5</td><td>Click the Save button.</td></tr>
</table>

PPC SPO Manual

Part III, General Transactions

Chapter 7, Leave and Other Approved Absences

Contents

Introduction

This chapter provides the procedure for navigating the **Absence Request** in DA II and the **Vacation Request** in DA I. The Absence Request is used to report Leave, Sick Leave, Post Deployment Mobilization Respite Absence (PDMRA), Adoption Leave and Paternity Leave. The Vacation Request is used to delete, in if necessary, resubmit requests that have processed through the Absence Request.

Contents

This chapter contains the following topics.

Topic	See Page
Overview	III-7-2
Absence Request Procedures	III-7-6
Corrections and Deletions	III-7-7
Using the DA I Vacation Request to Resubmit Leave	III-7-9
Leave Delete Report	III-7-16
Using Process Scheduler's Web Delivery Option	III-7-20

Overview

Introduction

The Absence Request allows a regular or reserve member on active duty to create an electronic Absence Request and submit it to their commanding officer or his/her designee for electronic approval. The commanding officer or his/her designee will approve or deny the Absence Request. It also allows the Servicing Personal Office (SPO) or unit administration office[1] to act as proxies, which enables them to enter and approve Absence Requests on behalf of the member and their unit. The Absence Request replaces the DA I Vacation Request functionality for **new** leave requests. The DA I Vacation Request will continue to be used by SPOs for leave deletions and resubmissions that cannot be input via the Absence Request.

Types of Absences

The following types of absences can be submitted by the member using Self Service or by the SPO or by a Field Admin user via the Proxy function.

1. Leave Inside Continental US
2. Leave Outside Continental US
3. Sick Leave (Note: Effective immediately, all periods of Sick Leave granted to enlisted personnel who are subject to discount meal rate charges (BAS-DMR) shall be recorded. The two-day limitation (Ref (c), 2.A.2.e) is no longer in effect. This will ensure DMR deductions for members assigned to Essential Station Messing or Essential Unit Messing are refunded for affected meals.)
4. Adoption Leave
5. Paternity Leave
6. Maternity Leave
7. Post Deployment Mobilization Respite Absence (PDMRA)
8. Leave taken in conjunction with a TDY. Entering leave on TDY orders in DA does not update the Vacation Request and no transaction is created for JUMPS processing.

Continued on next page

[1] Absence Request proxy access is applicable only for users at units that have executed a Memorandum of Understanding with their SPO to be assigned the Field Administration user role in DA. See reference (b), section 1.5.5 and exhibit 1-1, for more information on the Field Administration (CGFIELDADM) user role. These users will not have access to the Vacation Request.

Overview, Continued

Types of Absences (cont'd)

Leave taken in conjunction with **Discharges** shall be submitted using the DA II Absence Request, but only by SPOs. Members should not request terminal leave using the Self Service Absence Request; per reference (b), they should use the Career Intentions Worksheet, CG-2045.

VERY IMPORTANT: The Absence Request shall not be used for the following types of absences.

1. Leave taken in conjunction with PCS transfer
2. Leave taken in conjunction with a Release From Active Duty (RELAD)
3. Leave taken in conjunction with a Retirement.

SPOs must continue to record these types of leave using the PCS transfer or separations components as appropriate.

Continued on next page

Overview, Continued

Technical Background

The Absence Request functionality is part of a series of technology refresh projects designed to facilitate the transition to the newer version of PeopleSoft software (Migrating from version 8.0-"Direct Access I" to version 9.1- "Direct Access II"). This transition will culminate with the implementation of PeopleSoft Global Payroll replacing the Joint Uniform Military Pay System (JUMPS). Please read CG-1's "*Flag Voice #335, The Future of Direct Access*" for more information on upgrades to the Coast Guard's HR systems.

During this transition, applications have to be created that support Global Payroll implementation AND maintain backward compatibility with JUMPS.

For the Absence Request functionality, CG-631 has chosen to implement a data messaging routine that will transmit leave data from the DA II environment to the DA I environment. This method takes advantage of the existing JUMPS Action Generator (JAG) in DA I to create transactions for JUMPS processing and eliminates the time and expense that would be needed to implement similar functionality in DA II.

This method also creates constraints and limitations, which are necessary in order to maintain compatibility across four databases.

Technical Constraints:

- Leave entered in the DA I Vacation Request will not be reflected in the Absence Request history or unit report.

The member's leave balance is not available in the DA II Absence Request. The leave balance will continue to be updated on the member's E-LES, the SPO PDR LES and on the Unit Roster in DA I. It is important that members review their E-LES monthly to ensure that leave they have taken has processed through the payroll system.

Continued on next page

Overview, Continued

Technical Background (cont'd)

- The Absence Request history and unit report will not reflect leave scheduled in conjunction with PCS, RELAD or Retirement. (Reminder: Leave in conjunction with a Discharge from Active Duty **is** entered via the Absence Request, but only by the SPO.)

- Changes to an approved Absence Request can only be entered on or before the leave end date. Changes after the leave end date must be processed by the SPO using the DA I Vacation Request and they will not be reflected in the Absence Request history or the unit report.

Absence Request Procedures

Procedures

Absence Request user guides, providing procedures for Self-Service, Leave Approvers, and Proxies (SPOs & Field Admin users), are available via the DA Online Help (www.uscg.mil/ppc/ps) and the "eLeave" launch web page at www.uscg.mil/ppc/eleave. The procedures are available in a single guide designed for printing and desktop use, or in an online format for quick reference based on task and user role. Direct links to the procedures that will be of most use to SPO users are below:

1. Absence Request Overview
2. Submitting an Absence Request by Proxy
3. View/Change Pending Absence Request by Proxy
4. Approving a Pending Absence Request Submitted by Proxy (Same procedure as used for leave Approving Officials), see:
    1. How to Approve or Deny a Pending Absence Request
    2. How to Change/Deny an Approved Absence Request
5. How to Create the Monitor Absence Request Report

A series of video tutorials are also available via the DA Online Help and Internet site. Direct links to the video tutorials that will be of most use to SPO users are below:

1. Submitting an Absence Request by Proxy
2. Approving a Pending Request

Corrections and Deletions

Corrections via the Absence Request (DA II)

There will be instances when the member's approved Absence Request will need to be changed or denied (canceled). Only the original approver or his/her delegate may change or deny an approved Absence Request and only if the Absence Request has not processed (been updated within the Vacation Request page in Direct Access I, Version 8.0). The Absence Request will be processed the day after the member's Absence Request End Date.

Example: *Member's approved Absence Request has an absence begin date of 12 April 2012 and an end date of 16 April 2012. Duration of absence is 5 days. Today's date is 15 April 2012 and the member decides to return on this date. Since the member's absence end date has not passed yet, the approver or his/her delegate can go into the Absence Request and change the dates.*

See the "How to Change/Deny an Approved Absence Request" topic in the User Guide or Online Help for the procedure.

Corrections via the Vacation Request (DA I)

The Absence Request cannot be updated after the absence end date has occurred and only the SPO will be able to make the change to the absence period in Direct Access I.

Example: *Member's approved Absence Request has an absence begin date of 12 April 2012 and an end date of 16 April 2012. Duration of absence is 5 days. Today's date is 19 April 2012 and it is determined that the member returned on 15 April 2012 vice 16 April 2012. Since the member's absence end date has passed already and the Absence Request is locked down due to it already being processed, the SPO will need to make the changes in Direct Access I Vacation Request.*

Corrections, such as in the example above, or deletions, where an Absence Request was entered, approved and transmitted to DA I Vacation Request erroneously, must be deleted from the DA I Vacation Request and, if necessary (in the case of a correction), resubmitted***** by the SPO in the DA I Vacation Request.

Continued on next page

*If you are deleting a transaction in order to resubmit it with the correct date(s), you must complete the resubmission IMMEDIATELY after the deletion. The edit, which prevents the creation of new leave requests in DA I, will not permit you to enter the corrected absence request if it does not detect the deletion.

Corrections and Deletions, Continued

DA I Vacation Request Deletion Procedure

Transaction that have processed through DA II Absence Request and appear in the DA I Vacation Request cannot be corrected. They must be deleted and resubmitted. The resubmission is done following the "Vacation Request" procedures later in the chapter.

- **Delete** transactions by de-selecting the approval box. Go back to the leave row and click on the delete row icon  and follow the prompts. **Do delete a transaction if the "Start Date" is correct.**

Use row navigation links/buttons 

to display the row containing the entry you need to correct or delete.

VERY IMPORTANT!	If you are deleting a transaction in order to resubmit it with the correct date(s), you must complete the resubmission IMMEDIATELY after the deletion. The edit, which prevents the creation of new leave requests in DA I, will not permit you to enter the corrected absence request if it does not detect the deletion.

Using the DA I Vacation Request to Resubmit Leave

Introduction

As described in the Corrections and Deletions section of this chapter, the DA I Vacation Request must be used to Resubmit Leave that was submitted incorrectly in the DA II Absence Request.

First, follow the procedure in the Corrections and Deletions section to delete the DA Vacation Request row, then follow the steps below to resubmit the leave in the DA I Vacation Request.

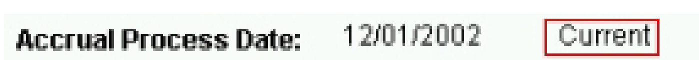
VERY IMPORTANT!	The resubmission must be completed immediately after the deletion. The edit, which prevents the creation of new leave requests in DA I, will not permit a user to enter the corrected absence request if it does not detect the deletion.

Before You Begin

The leave balances displayed will not always be accurate. For example, leave taken in connection with a PCS transfer will not be reflected in the balance displayed on this page. The member's LES or JUMPS segment 62 can be used to verify a member's leave balance.

The page includes multiple rows of data (one for each month of the year). Each row is identified by the "***Accrual Process Date***". Normally, you will enter leave transactions in the row dated the first of the month following the month in which the leave was taken. This will make the transaction easier to locate in the event a correction or deletion is required. However, the row used to make the entry has no impact on the final transaction sent to JUMPS for processing. The leave will still be charged, regardless which row is used.

Accrual Process Date Example:
Member took leave on 25 November. Enter the transaction in the row with the Accrual Process Date of 1 December.



Continued on next page

Vacation Request, Continued

Items to Consider

- This transaction allows the user to enter multiple leave periods.
- Inclusive dates are used.

Example: Member's CG-2519, Leave Authorization, shows member departing at 1530 on 14 September 2003 and returning at 0900 on 20 September. The member utilized 5 days of leave. The ***inclusive*** dates are 15 to 19 September 2003.

- There should never be a time when a leave period on a member overlaps with another leave period for that same member (i.e., member took leave from 1 August to 5 August and then from 4 August to 10 August).
- This transaction must not be used in connection with the PCS travel orders. The PCS Departing and PCS Reporting transactions are used for this purpose.
- This transaction must not be used in connection with RELAD (Release from Active Duty) or retirement. The Endorsement on Orders transactions are used for this purpose.
- This transaction cannot be used to record compensatory absence. Compensatory absence is only reported when taken in connection with PCS from an isolated duty station. Compensatory absence taken during the member's tour at an isolated duty station is not entered in Direct-Access or JUMPS.
- This transaction must be used if a member is authorized more than 2 consecutive days of sick leave. Sick Leave of less than 3 days is not reported.
- This transaction must be used if member is being discharged and is taking terminal leave in conjunction with discharge. The terminal leave is reported on this transaction.
- This transaction must be used if member takes leave in conjunction with TAD orders.

Terminal Leave

Leave taken in conjunction with a RELAD or Retirement must be entered in the Separations component and **NOT** recorded in the Vacation Request page.

Continued on next page

Using the DA I Vacation Request to Resubmit Leave,
Continued

Procedure Start Internet Explorer, sign into Direct-Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Home > Administer Workforce > Monitor Absence (GBL) > Use > **Vacation Request**
2	A search page will appear. Enter the member's employee ID number or Social Security number (see Employee ID Search Tips) and click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or Social Security Number (SSN) before making any changes.**
3	The Vacation Request page will display. • The page includes multiple rows of data. Each row is identified by the "***Accrual Process Date***". The current month's row will be displayed. **Example**: If today's date is 15 December, the Accrual Process Date will be 1 December, as shown below. "**Current Accrual Process Date**" *row.* **Accrual Process Date:** 12/01/2002 Current • Normally, you will enter leave/authorized absence transactions in the row dated the first of the month following the month in which the leave/authorized absence was taken. This will make the transaction easier to locate in the event a correction or deletion is required. The row used to make the entry has no impact on the final transaction sent to JUMPS for processing. The leave will still be charged, regardless which row is used.

VERY IMPORTANT!
If you are deleting a transaction in order to resubmit it with the correct date(s), you must complete the resubmission IMMEDIATELY after the deletion. The edit, which prevents the creation of new leave requests in DA I, will not permit you to enter the corrected absence request if it does not detect the deletion.

Continued on next page

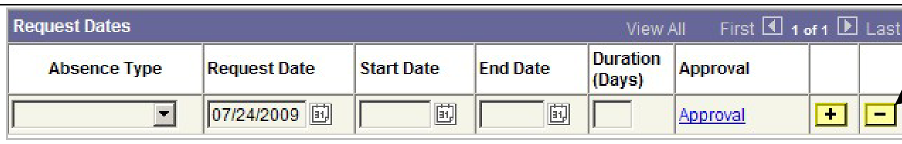
Using the DA I Vacation Request to Resubmit Leave
Continued

Procedure (cont'd)

> **Warning**
> Do not delete a transaction if the "Start Date" is correct. Only delete a transaction when the start date is incorrect or the member did not take the leave. Follow the procedure for corrections (above) to correct a leave "End Date". See Corrections and Deletions on Page 9

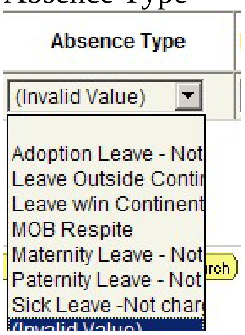
> *Reminder!*
> Inclusive dates are used for the start and end date fields

Step	Action
4	(see below)

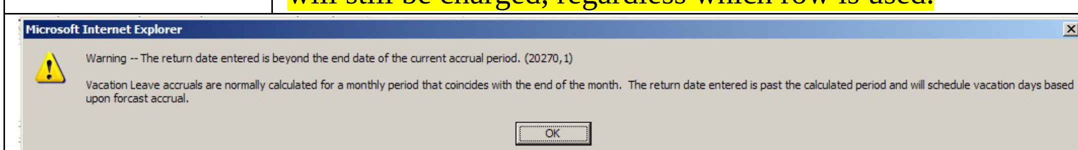


Complete the data fields:

Field	Data Entry
Absence Type	Select the Absence type from the drop-down menu. Choices are:
Request Date	Defaults to today's date, no need to change.
Start Date	Enter the first date charged as leave or the first day of authorized absence.
End Date	Enter the last date charged as leave or the last day of the absence. (Note: If the end date spans into the next month, in this transaction or any previously entered transaction, you will receive a **warning** message (shown below) about process accrual process dates. You may click OK to dismiss the message. The row used to make the entry has no impact on the final transaction sent to JUMPS for processing. The leave will still be charged, regardless which row is used.
Duration (Days)	Number of days leave used or number of days absence authorized, computed by system based on inclusive dates entered in Start and End date fields.
Approval	Click link to access approval page.



Type
Adoption Leave – Not Chargeable
Leave Outside the Continental United States
Leave w/in the Continental United States
MOB Respite
Maternity Leave – Not Chargeable
Paternity Leave – Not Chargeable
Sick Leave – Not chargeable

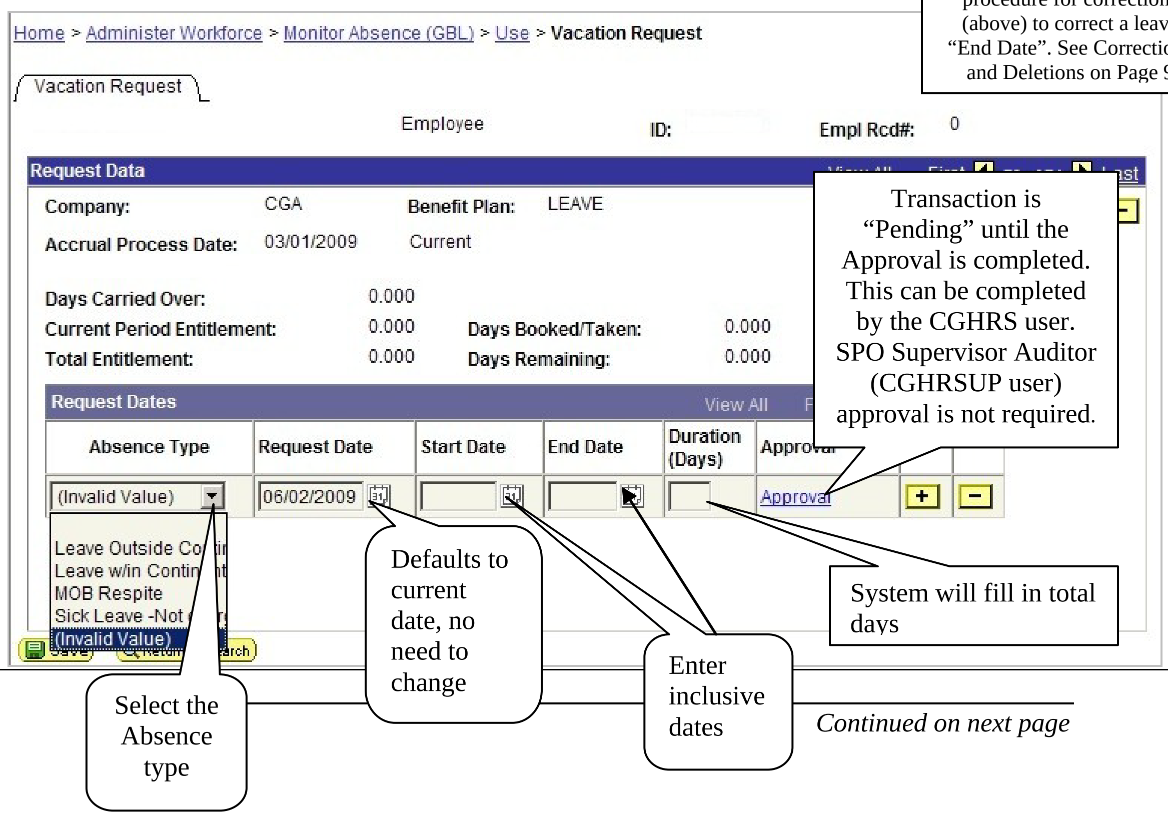


Continued on next page

Using the DA I Vacation Request to Resubmit Leave,
Continued

Warning
Do not delete a transaction if the “Start Date” is correct. Only delete a transaction when the start date is incorrect or the member did not take the leave. Follow the procedure for corrections (above) to correct a leave “End Date”. See Corrections and Deletions on Page 9

Procedure (cont’d)

Step	Action
4	

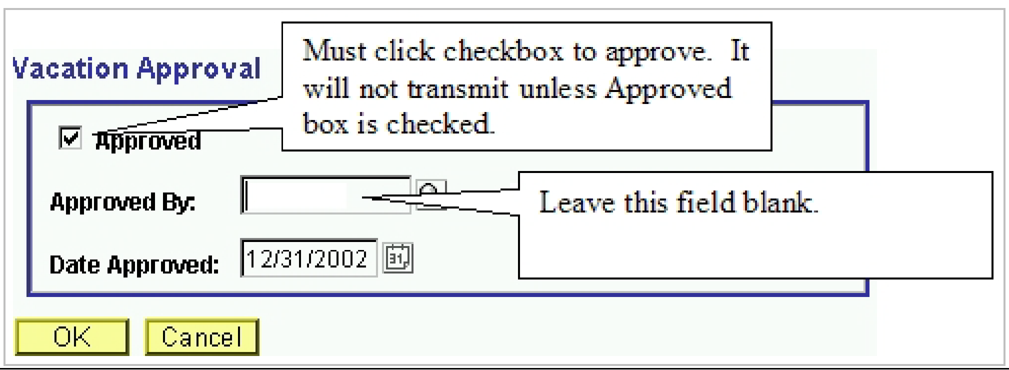
Continued on next page

Using the DA I Vacation Request to Resubmit Leave,
Continued

Step	Action
5	Click the link in the Approval column to open the approval page. Complete the data fields as described below.
6	Click the OK button. You will be returned to the Vacation Request page.
7	Review the data you have entered. If it is correct, click the save button to submit the transaction for JUMPS for processing.
8	Click the insert row icon + to add another leave period, or the return to search button to record leave on another member.

Step 5 table:

Field	Date Entry
Approval	Click the checkbox to approve the transaction. It will not transmit to JUMPS if you do not mark this checkbox.
Approved By	Optional. Enter your employee ID number.
Date Approved	Today's date.



Step 7 screenshot:

Absence Type	Request Date	Start Date	End Date	Duration (Days)	Approval		
MOB Respite	06/02/2009	06/08/2009	06/12/2009	5	Approval	+	−

Continued on next page

Warning
Do not delete a transaction if the "Start Date" is correct. Only delete a transaction when the start date is incorrect or the member did not take the leave. Follow the procedure for corrections (above) to correct a leave "End Date". See Corrections and Deletions on Page 9

Using the DA I Vacation Request to Resubmit Leave,
Continued

JUMPS Effect

An L63B is created in RECENTS when a "LEAVE" absence type transaction processes into JUMPS. This transaction updates the following in JUMPS:

- Segment 03
- Segment 62 (shows the amount of leave member currently has)
- Segment 74 (shows the inclusive dates of leave taken by member)
- The Discount Meal Rate is refunded for all regular leave and sick leave (Note that Adoption, Paternity & Maternity leave all process as sick leave).

Sick Leave, Maternity Leave, Adoption Leave and Paternity Leave absence types do not affect the member’s leave balance.

MOB Respite (PDMRA) absence types do not transmit to JUMPS.

Maternity Leave, Adoption Leave and Paternity Leave absence types will process through JUMPS as Sick Leave.

Leave Delete Report

Introduction

The Leave Delete Report provides a record of deleted leave transactions. This section provides the procedure for running the Leave Delete Report.

Background

A review of member leave deletions was conducted by PPC's Financial Account and Internal Review branch (FAIR) at the request of PPC's Operations Division to determine if deletions to previously posted annual leave transactions were being submitted properly, and to identify any potential abuse. The audit revealed the following:

- There were personnel assigned to a SPO who had deleted leave on their own account, thus adding the leave back into their account.
- The SPOs are not keeping sufficient leave records to verify the proper/improper deletion of leave.
- In a majority of cases where leave is charged as excess at the time of separation either previously reported leave is deleted or the endorsements are changed to bring the leave balance to zero.
- Of the 3,457 deleted leave documents, 404 were on YN accounts.

Information

The report includes the following information:

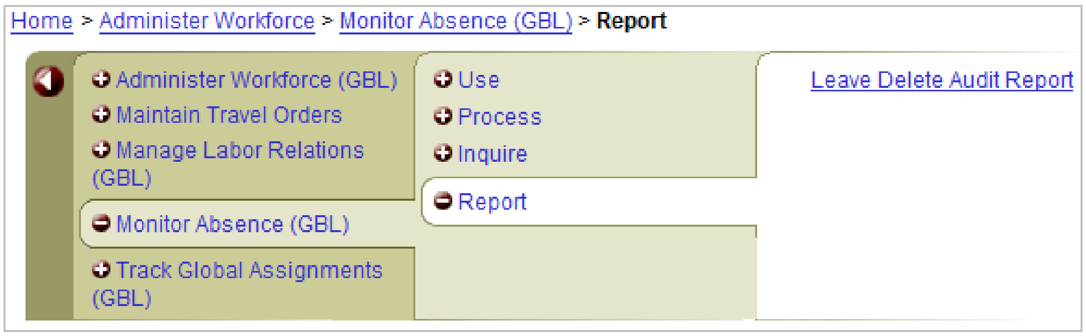
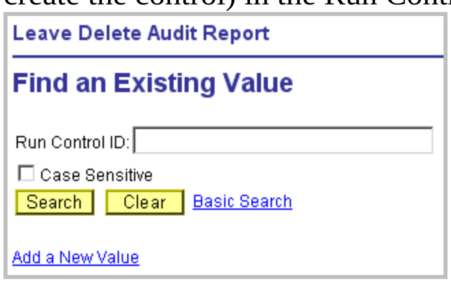
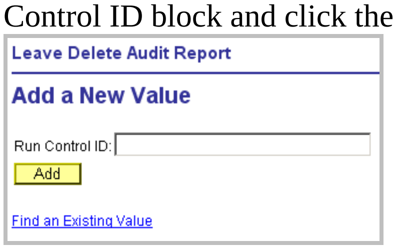
Column	Description
EMPLID	Member's employee ID number
DEPTID	Department ID for the member's unit
BEGIN DATE	Start date on the original leave transaction
END DATE	End date on the original leave transaction
DELETE DATE	Date the transaction was deleted
OPRID	The user ID of the person who deleted the transaction
OPERATOR NAME	The name of the person who deleted the transaction (Last, First)
JAG PROC DT	Date the delete transaction audit record was created

Continued on next page

Leave Delete Report, Continued

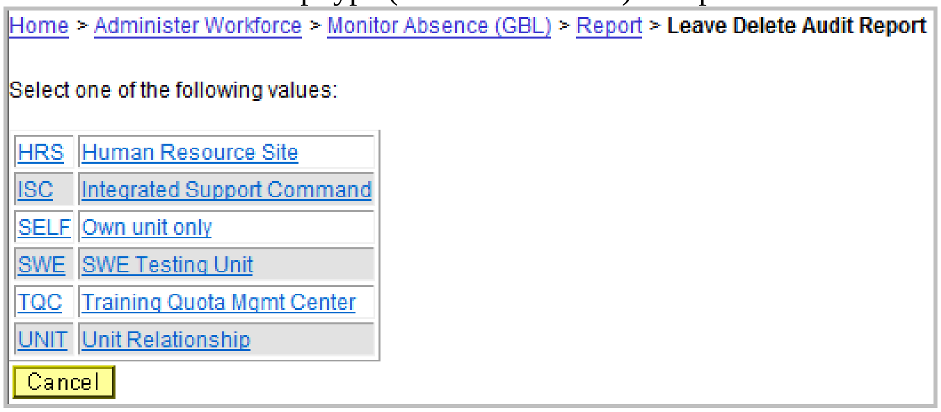
Procedure

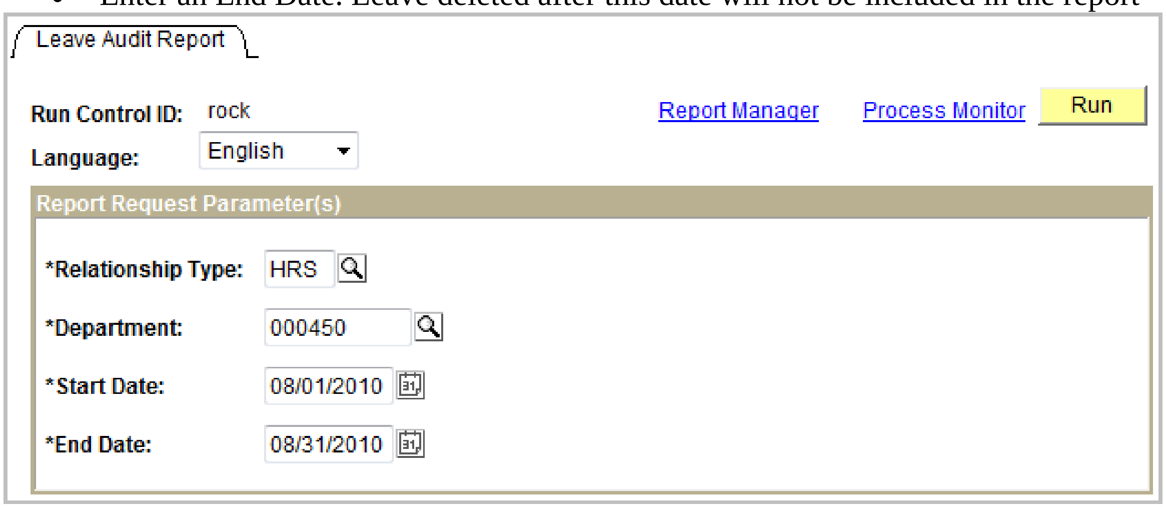
Start Internet Explorer, sign into Direct-Access and follow these steps to run the Leave Delete Report.

Step	Action
1	Select menu items in the following order: 
2	The Run Control ID Entry Page will open. **If you have used this process before**, enter your initials (or other ID you used to create the control) in the Run Control ID block and click the  button.  <-Initials **If this is the first time you have used this process**, click the Add a New Value link. Enter your initials (or other ID you used to create the control) in the Run Control ID block and click the  button. 

Continued on next page

Leave Delete Report Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Report Setup Page will open.
Select Unit Relationship type (ISC or HRS-SPO) to report on.


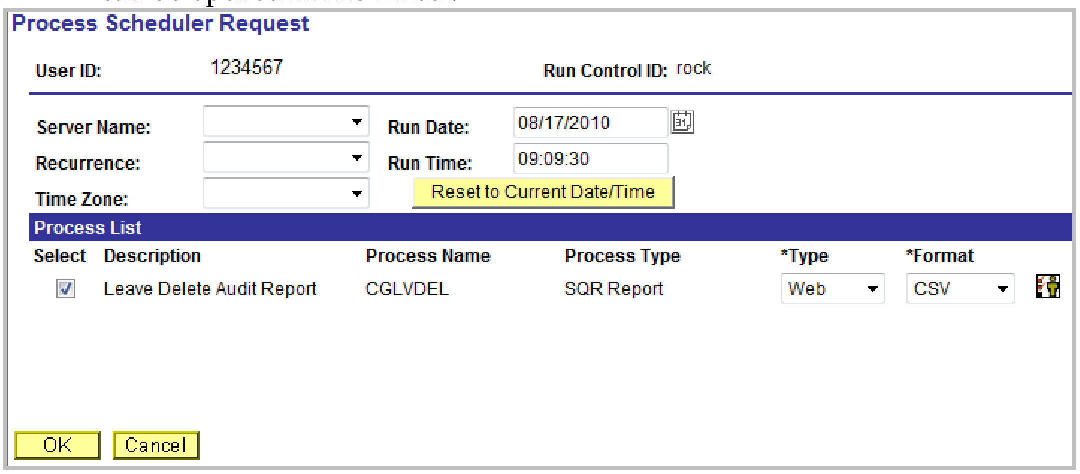
(Note: Other values (Self, SWE, TQC & Unit) are not valid for this report)
Enter the Department ID number of the ISC or HRS site to report on.
Enter a Start Date. Leave deleted before this date will not be included in the report
Enter an End Date. Leave deleted after this date will not be included in the report

</td></tr>
<tr><td>4</td><td>Click the  button to begin processing.</td></tr>
</table>

Continued on next page

Leave Delete Report Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The process scheduler request page will open.

Set the Type to Web (to access the report online (See Using Process Scheduler Web Option for more information)
Set the Format to PDF (for an Adobe Acrobat file) or CSV for a file that can be opened in MS Excel.



</td></tr>
<tr><td>6</td><td>Click OK to run the report.</td></tr>
<tr><td>7</td><td>Retrieve the report from the Report Server using the Process Scheduler Web Option.</td></tr>
</table>

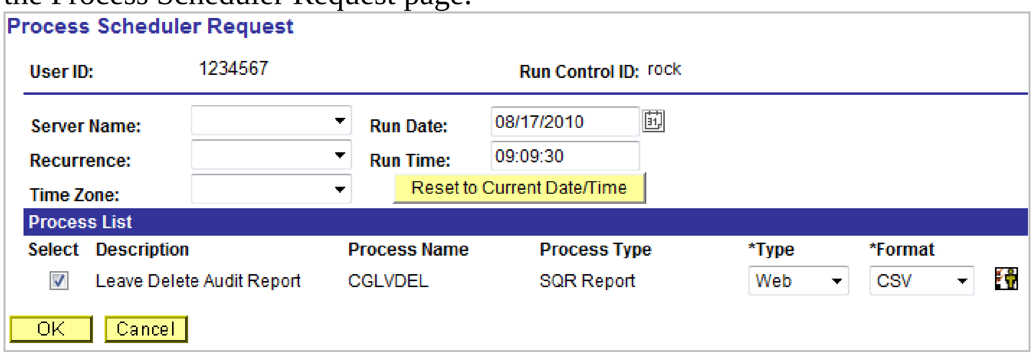
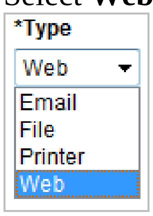
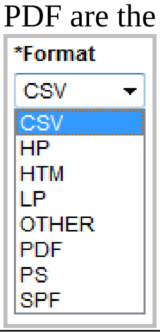
Using Process Scheduler's Web Delivery Option

Introduction

Most reports use the Process Scheduler to run and deliver the report. The report procedures normally discuss using the email option to deliver the report to your email address. However, the email option was eliminated; you must access the report online using the Web delivery option.

Procedure

Follow these steps to use Process Scheduler's Web delivery option.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Process Scheduler for the report you want to run and complete the run control page per that report's instructions. Then, click the Run button to access the Process Scheduler Request page.

</td></tr>
<tr><td>2</td><td>Select Web from the Process Type drop down menu.

</td></tr>
<tr><td>3</td><td>Select the file format. Not all file formats are supported by all reports, CSV and PDF are the most reliable.


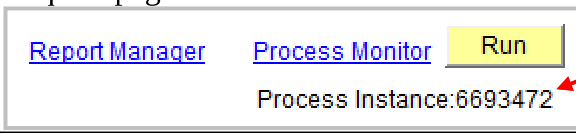
CSV = Readable by MS Excel, text editors, other spreadsheet programs and database applications.
HTM = Web page
PDF = Adobe Acrobat</td></tr>
<tr><td>4</td><td>Click the 
 button to launch the process and return to the Process Scheduler Request page.</td></tr>
</table>

Continued on next page

Using Process Scheduler's Web Delivery Option, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

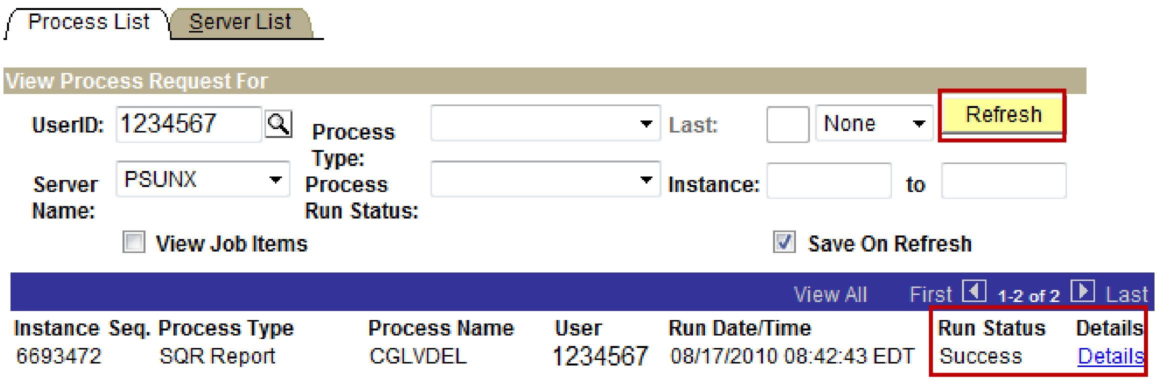
Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page.



Note the Process Instance number has been added.

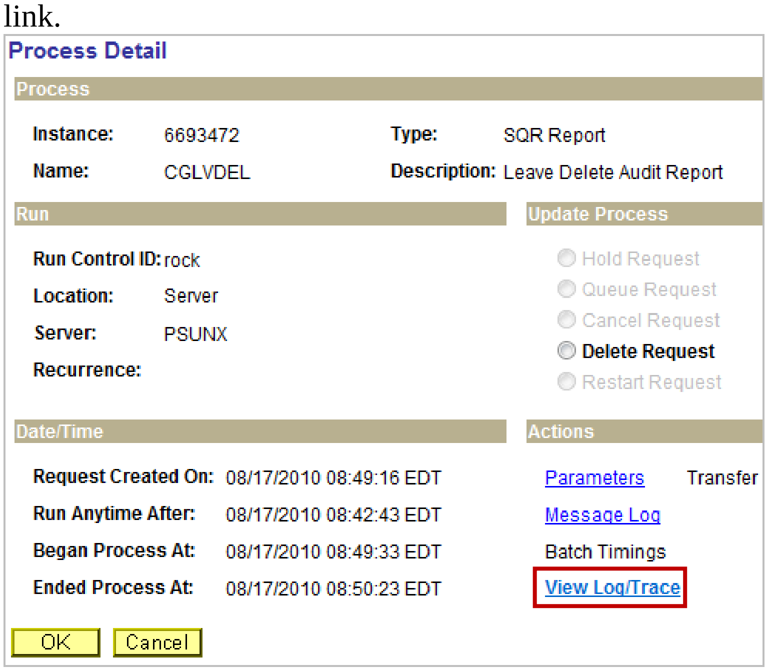
</td></tr>
<tr><td>6</td><td>

The Process Monitor page will display. Click the Refresh button periodically until the **Run Status** shows "*Success*" and the Details link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.



</td></tr>
<tr><td>7</td><td>

Click the Details link. The Process Detail Page will display. Click the View Log/Trace link.

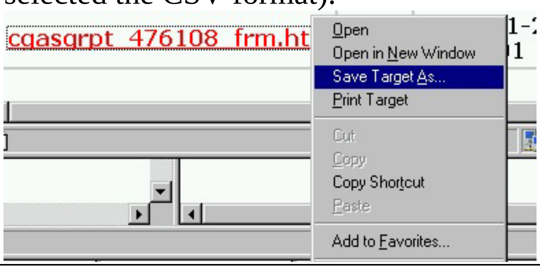


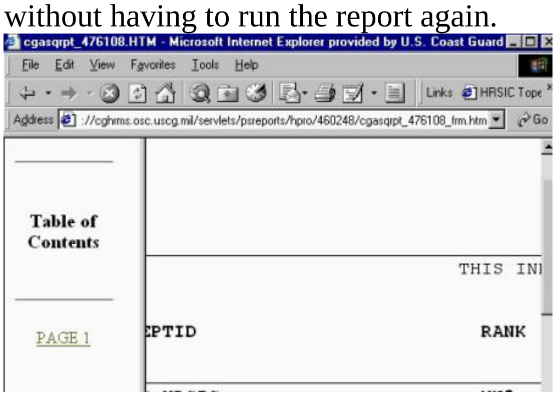
</td></tr>
</table>

Continued on next page

Using Process Scheduler's Web Delivery Option, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, cgasqrpt_476108_frm.htm is the link to the report).


Note: You can also right mouse click and save the report (advisable if you selected the CSV format).

</td></tr>
<tr><td>9</td><td>Your report will open and display in the web browser.

Note: Bookmark the report page and you can view it later (within 5 days) without having to run the report again.

</td></tr>
</table>

PPC SPO Manual

Part III, General Transactions

Chapter 8, Personal Data Changes

Overview

Introduction

This guide provides the procedures for navigating the Personal Data Changes component in Direct Access.

Contents

This chapter contains the following topics.

Topic	See Page
Employee Address and Home of Record	III-8-3
Change of Name	III-8-9
Name Correction	III-8-11
Correction of Social Security Number (SSN) or Date of Birth (DOB)	III-8-13
Citizenship Status Changes/Passport Information	III-8-15
Non Self-Service Diversity Update	III-8-21
Statement of Creditable Service	III-8-25
Member Email Address	III-8-33

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Employee Address and Home of Record

Ref: (a) Joint Federal Travel Regulations (JFTR), Appendix A – Definitions & Acronyms, "HOME OF RECORD"

Introduction

This section provides the procedures for changing a member's home and mailing address and for viewing the Home of Record. The Home of Record is established in connection with accession documents and transactions. *The Home of Record can only be corrected it cannot be changed (See reference (a)).* Changes to the member's mailing address will be passed to JUMPS, Segment 66.

Effective Date:

A mailing address change will normally be effective the first day of the month following the month it is submitted. If the mailing address change is submitted on the first day of the month, it will be effective the same month. Examples:

- A mailing address change submitted between 2 and 31 October, will be effective in November and be reflected on the LES issued for November.
- A mailing address change submitted on 1 November, will be effective in November and be reflected on the LES issued for November.
- A mailing address change submitted between 2 and 30 November, will be effective in December and be reflected on the LES issued for December.

Government Travel Charge Cardholders:

Note that address changes submitted for personnel and pay data (Change Home or Mailing Address or Employee Address and Home of Record) are not provided to the Government Travel Credit Card (GTCC) contract. Card holders must notify GTCC, separately, when their address changes.

In order to update the address, the cardholder needs to call the GTCC listed on the back of their government travel charge card and update their mailing address.

Continued on next page

Employee Address and Home of Record, Continued

Procedure

Log into Direct Access and follow these steps to view, enter or change a member's address information.

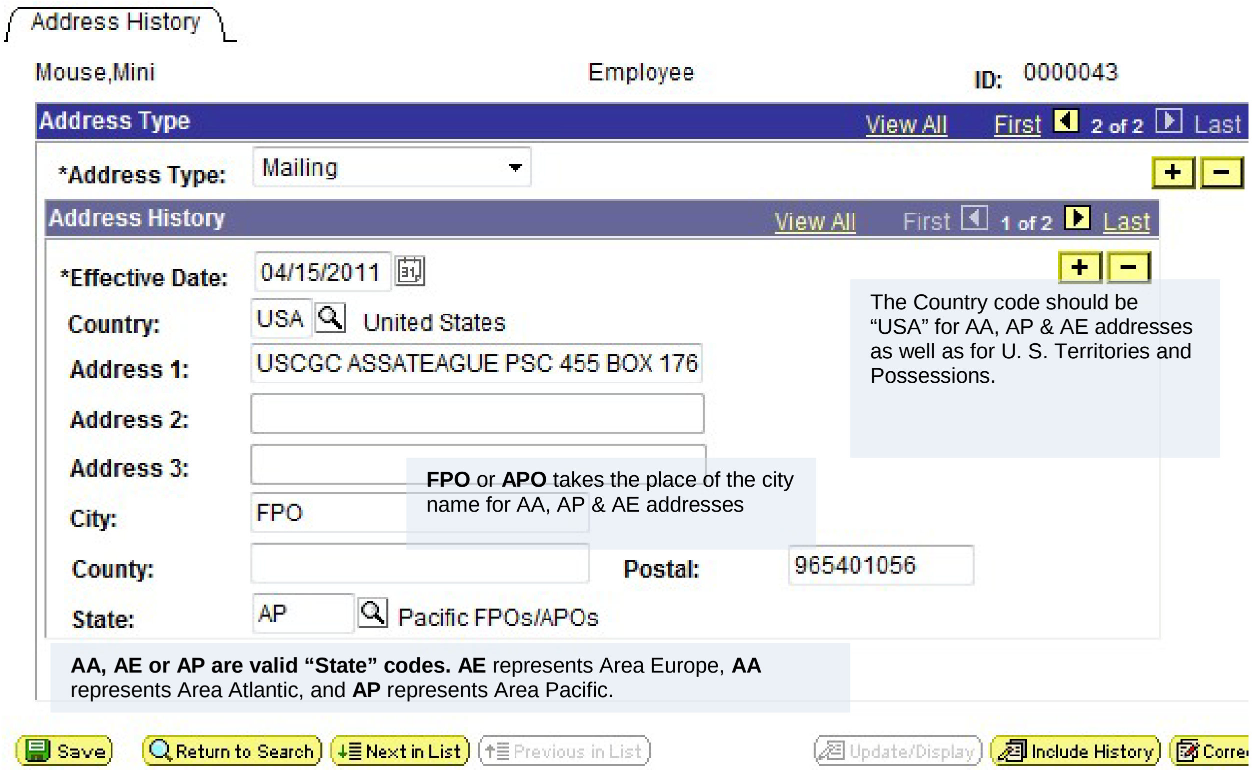
Step	Action
1	Select menu items in this order: Enterprise Menu > Administer Workforce > Administer Workforce > Use > Addresses
2	A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
3	The Address page will display. Most members will have three address types on file: 1. Home 2. Home of Record. Note: The regulation governing the home of record is the JFTR, Appendix A. As defined by the JFTR, the home of record (HOR) can only be changed if there's a break in active duty service of more than one full day. An individual's home of record is a place recorded as the home of the member when commissioned appointed, enlisted, inducted or ordered on active duty. The HOR does not change when a member, on active duty, is discharged to accept an appointment or commission if there's no break in service. 3. Mailing (Reflected on member's LES. Used for mailing of W2 forms and other official correspondence.) Select the address type you want to view. Only one address type will be displayed when you first access the page. Use the "View All" or navigation arrow links View All First 1 of 3 Last to view the other addresses.

Continued on next page

Employee Address and Home of Record, Continued

Procedure (continued)

Example 1: "FPO" address



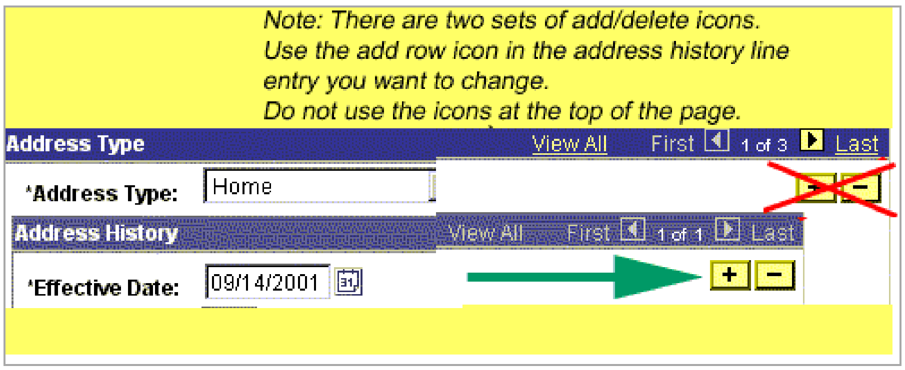
AE represents Area Europe, **AA** represents Area Atlantic, and **AP** represents Area Pacific.

Example 2: U.S. Territory/Possession address

Continued on next page

Employee Address and Home of Record, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>You cannot delete or change and address, click the + button to add a new row. This will create a new row of the same address type, the existing address data will automatically be added to the new row. The effective date of the new row will show the current date.


Enter the address data.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Address Type</td><td>Drop-Down menu. The field will be set to the appropriate address type (home or mailing) when you add the new row.</td></tr>
<tr><td>Effective Date</td><td>The effective date of the new row will show the current date. You may future date this transaction. You cannot backdate this transaction.
A mailing address change will normally be effective the first day of the month following the month it is submitted. If the mailing address change is submitted on the first day of the month, it will be effective the same month. Examples:
A mailing address change submitted between 2 and 31 October, will be effective in November and be reflected on the LES issued for November.
A mailing address change submitted on 1 November, will be effective in November and be reflected on the LES issued for November.
A mailing address change submitted between 2 and 30 November, will be effective in December and be reflected on the LES issued for December.</td></tr>
</table></td></tr>
</table>

Continued on next page

Employee Address and Home of Record, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>NOTE: Refer to Standard Distribution List, COMDTNOTE 5605 (series) when entering a CG Unit address as the member's mailing address.</td><td>
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Country</td><td>Enter "USA" for U. S.(including American Samoa, Federated States of Micronesia, Guam, Marshall Islands, Northern Mariana Islands, Puerto Rico, Palau, Trust Territory, and Virgin Islands of the US), AA, AP & AE, addresses or click the button to lookup a country code.

Note: The country should be set to “USA” for overseas/ OUTCONUS duty stations served by the Military Postal Service (MPS) and USCG cutters/mobile units assigned FPO ZIP Codes</td></tr>
<tr><td>Address 1</td><td>The first line of the member's address (e.g. "123 Main Street" or "P.O.Box 12").</td></tr>
<tr><td>Address 2/3</td><td>Not used, leave blank (data in these fields will not be passed to JUMPS, Segment 66, when updating the member's mailing address).</td></tr>
<tr><td>City</td><td>Enter the City, or for overseas/OUTCONUS duty stations served by the Military Postal Service (MPS) and USCG cutters/mobile units assigned FPO ZIP Codes enter “FPO” or “APO” as appropriate</td></tr>
<tr><td>County</td><td>County, if known</td></tr>
<tr><td>State</td><td>Enter the standard two-letter state abbreviation code. Click the icon to perform a lookup of codes if necessary.
Note: For units served by the Military Postal Service and for USCG cutters/mobile units assigned FPO ZIP Codes, enter “AE,” or “AA,” or “AP” as appropriate. AE represents Area Europe, AA represents Area Atlantic, and AP represents Area Pacific. “State” includes U.S. territories or possessions; American Samoa, Federated States of Micronesia, Guam, Marshall Islands, Northern Mariana Islands, Puerto Rico, Palau, Trust Territory, and Virgin Islands of the US</td></tr>
<tr><td>Postal</td><td>Zip, Postal, or MPS code.</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>Click the Save button to save your work. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help. You may now exit the system or choose another function from the menus.</td></tr>
</table>

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Change of Name

Introduction

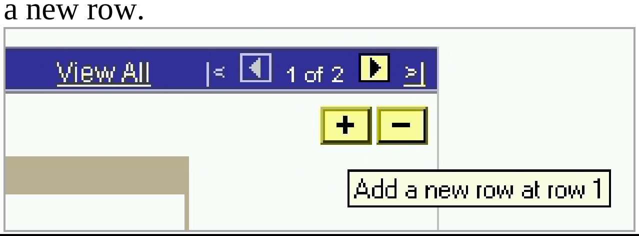
This section provides the procedure to record a member's name change. Do not use this procedure to correct a member's name. Follow the procedure in the Name Correction topic to submit corrections.

Reference

Section 5-D of the Personnel and Pay Procedures Manual, PSCINST M1000.2(series) lists documentation requirements, which must be met in order for a member to change their name.

Procedure

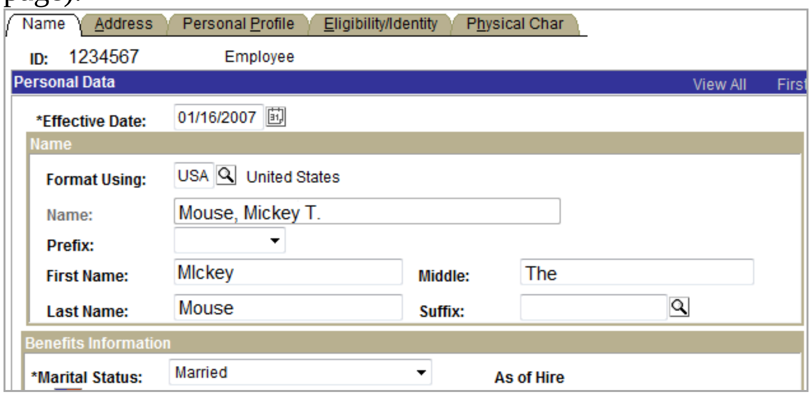
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Home > Administer Workforce > Administer Workforce > Use > Personal Data A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
2	The Employee Personal Data page will display. **Click the + to begin a new transaction**. The effective date field will change to today's date and the number of rows will increase. If you are just viewing the information it is not necessary to add a new row. 

Continued on next page

Change of Name, Continued

Procedure (continued)

Step	Action
3	The member's name is shown on the first tab (Name tab of the Personal Data page).  • Enter the effective date of the change in the **Effective Date** field (dates are all numeric and are entered in MM/DD/YYYY format, click the icon to look up the date if necessary). • Update the First Name, Middle and Last Name fields as necessary to reflect the member's new name. Not all fields will need to be updated. • Use the lookup icon in the Suffix field to lookup and add a suffix if applicable. NOTE Do not enter any spaces in any of the name fields. Any letters after blank spaces are not recognized when the name change data is loaded into the pay system (JUMPS). Examples: • De Roche (comes across as De) Should be DeRoche when entering in DA so it will come across as DEROCHE. • Mc Tee (comes across as Mc) Should be McTee when entering in DA so it will come across as MCTEE. • De Vergers (comes across as De) Should be DeVergers when entering DA so it will come across as DEVERGERS. • Van Delden (comes across as Van) Should be VanDelden when entering in DA so it will come across as VANDELDEN.
4	Click Save to save the name change. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.

Name Correction

Introduction

This section provides the procedure to correct a member's name. **Do not use this procedure to change a member's name** (e. g. Change of surname in connection with marriage or divorce.). Follow the procedure in the Change of Name topic to submit name changes.

Reference

Section 5-D of the Personnel and Pay Procedures Manual, PSCINST M1000.2(series) lists documentation requirements, which must be met in order to enter a correction to official records.

Procedure

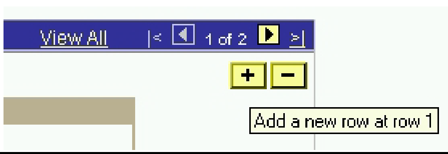
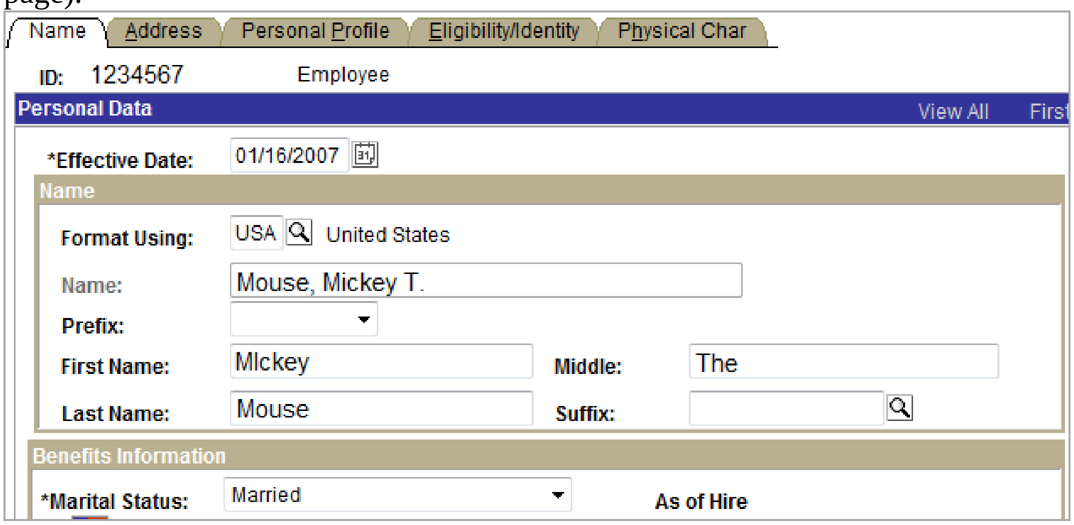
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Home > Administer Workforce > Administer Workforce > Use > **Personal Data** A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips). Then, click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**

Continued on next page

Name Correction, Continued

Procedure (continued)

Step	Action
2	The Employee Personal Data page will display. **Click the + to begin a new transaction**. The effective date field will change to today's date and the number of rows will increase. If you are just viewing the information it is not necessary to add a new row. 
3	The member's name is shown on the first tab (Name tab of the Personal Data page).  • Correct the First Name, Middle and Last Name fields as necessary to reflect the member's correct name. Not all fields will need to be updated. • Use the lookup icon in the Suffix field to lookup and add a suffix if applicable.
4	Click Save to save the name correction. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.

Correction of Social Security Number (SSN) or Date of Birth (DOB)

Introduction

This section provides the procedure to correct a **member's** Social Security Number (SSN) or Date of Birth (DOB).

Reference

Section 5-D of the Personnel and Pay Procedures Manual, PSCINST M1000.2(series) lists documentation requirements, which must be met in order to enter a correction to official records.

Before You Begin

You will not be able save changes to **Personal Data** if the member's addresses (mailing, home and home of record) are not correctly entered in the system. Verify the member's address data BEFORE making other changes to **Personal Data.**

Procedure

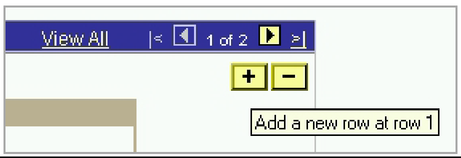
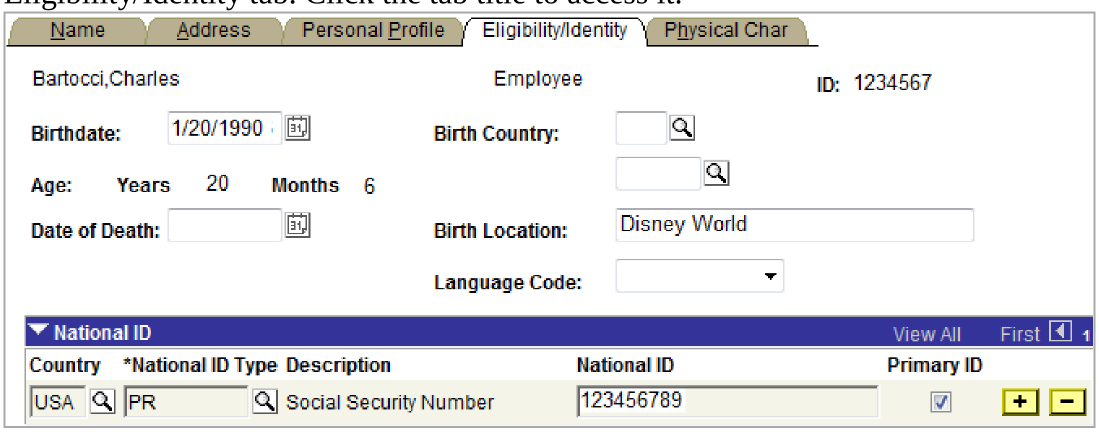
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Home > Administer Workforce > Administer Workforce > Use > **Personal Data** A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips). Then, click the Search button to select the member you wish to display. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**

Continued on next page

Correction of Social Security Number (SSN) or Date of Birth (DOB), Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The Employee Personal Data page will display. Click the [+] to begin a new transaction. The effective date field will change to today's date and the number of rows will increase. If you are just viewing the information it is not necessary to add a new row.

</td></tr>
<tr><td>3</td><td>The member's Date of Birth and Social Security Number are entered on the Eligibility/Identity tab. Click the tab title to access it.


Correct the Birthdate field and/or the National ID (for SSN corrections) field. Do not use the add/remove row icons in the National ID area, simply enter the correct SSN.</td></tr>
<tr><td>4</td><td>Click [Save] to save the correction.
Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.</td></tr>
</table>

Citizenship Status Changes/Passport Information

Introduction

This section provides procedures for using Direct Access to view or record a change in a member's citizenship status and information about a member's passport and dependent's passport.

Discussion

The Direct Access implementation replaces SDAII's "Member Became U. S. Citizen (P357)" transaction. All official passports (active duty members and dependents) and diplomatic passports must be entered into Direct Access. During the implementation phase all Servicing Personnel Offices will be asked to enter the passport data into Direct Access. Newly issued passports will be entered by the CG-00I staff.

Before You Begin

If a member is a nonresident alien (defined as a citizen of a foreign country who has not applied for U. S. Citizenship) a tax information transaction must be submitted showing that the member is a resident alien (defined as a member who has applied for U. S. Citizenship) prior to submitting a citizenship status change.

Menu Path:

Select the following menu items to begin this transaction:

Administer Workforce > Administer Workforce (GBL) > Use > Identification Data

1. Enter the member's employee ID number in the Emplid field or their SSN in the Social Security Number field of the Find an Existing Value page.
2. Click the search button to continue.

When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification**.**

Continued on next page

Citizenship Status Changes/Passport Information, Continued

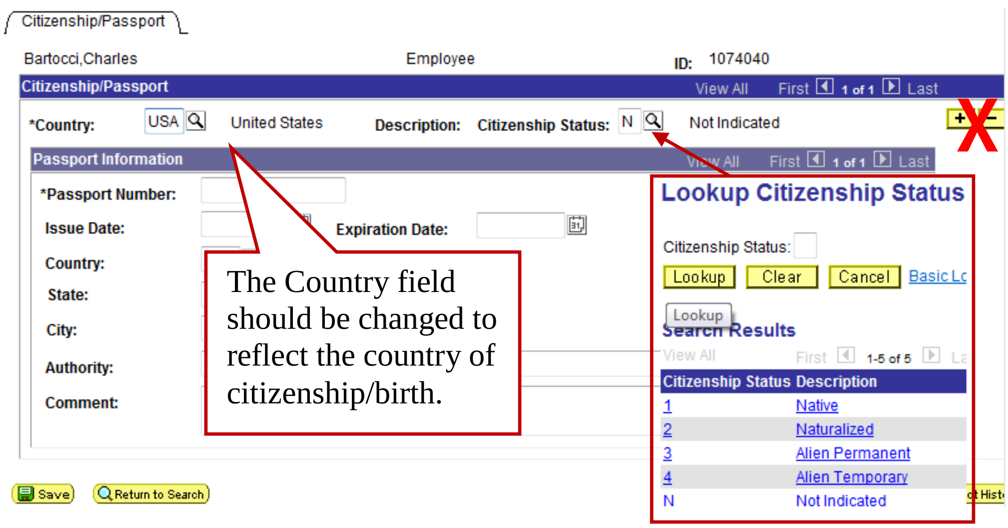
Data Entry

The Citizenship/Passport page will display.

- The page loads with the member's current citizenship status displayed. This page does not have an effective date; it is not necessary to insert a new row before changing the citizenship status.
- The Passport Information section of the page does not need to be completed in order to update/change a member's citizenship status. However, you may enter the Passport data if you have the information available.

Citizenship Information

Follow these steps to update Citizenship Information:



Note: DO NOT insert or delete rows in the citizenship data area. All work is done in the current row.

Continued on next page

Citizenship Status Changes/Passport Information, Continued

Procedure

The following steps will show you how to update Citizenship Information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the lookup icon [] next to the *Country field to display a list of valid country codes. Select the country of the member's birth.</td></tr>
<tr><td>2</td><td>Click the lookup icon [] next to the Citizenship Status field to display a list of valid entries.</td></tr>
<tr><td>3</td><td>Select the correct status from the list.
<table>
<tr><td>Status Description</td><td>Use When Member is a</td></tr>
<tr><td>Native</td><td>Native U. S. Citizen</td></tr>
<tr><td>Naturalized</td><td>Naturalized U. S. Citizen</td></tr>
<tr><td>Alien Permanent</td><td>Resident Alien</td></tr>
<tr><td>Alien Temporary</td><td>Non-resident Alien</td></tr>
</table></td></tr>
<tr><td>4</td><td>Click the Save button. The transaction is now complete.</td></tr>
</table>

Passport information

Follow these steps to add/update Passport Information:

Administer Workforce > Administer Workforce (GBL) > Use > Identification Data

1. Enter the member’s employee ID number in the Emplid field or their SSN in the Social Security Number field of the Find an Existing Value page.
2. Click the search button to continue.

When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification**.**

Continued on next page

Citizenship Status Changes/Passport Information, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Enter Passport Information for all official passports issued to the member and, if applicable, the member's dependents.
Note: Members’ or dependents’ receiving a new passport should have a new row added to enter the passport information. Do not delete or over type the old passport information. You will notice the plus (+) or minus (-) sign under the passport information (right side of the screen). Be careful, do not click the (+-) button on the Citizenship row.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Passport Number</td><td>The number of the passport. Only passport numbers starting with the number 6, 8 and 9 will be entered in Direct Access. DO NOT enter tourist passport information into Direct Access.</td></tr>
<tr><td>Issue Date</td><td>Date the passport was issued. Enter the date the passport was issued. This date can be found on the title page of the members’ or dependents’ passport.</td></tr>
<tr><td>Expiration Date</td><td>Date the passport expires. Enter the date the passport is to expire. This date can be found on the title page of the members’ or dependents’ passport.

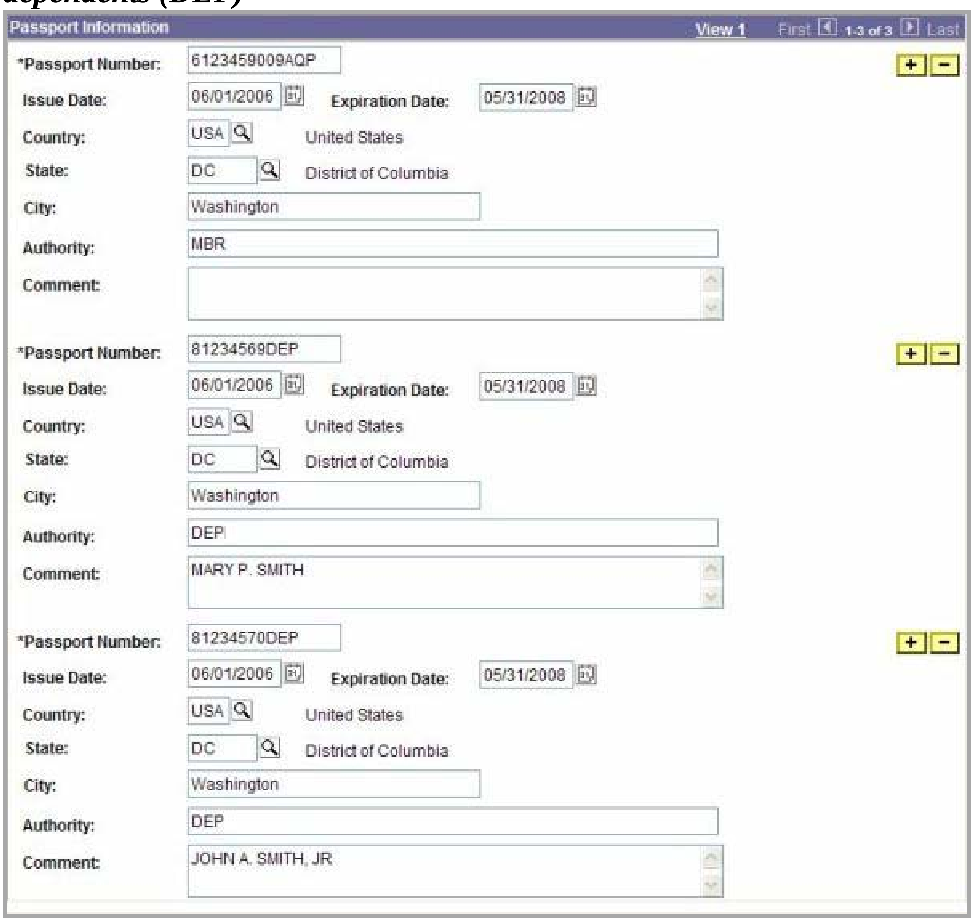
Note: When members’ or dependents’ passport information expires do not delete the information from Direct Access.</td></tr>
<tr><td>County</td><td>Country the passport is issued defaults to USA. If for some reason USA is not the default please type in USA.</td></tr>
<tr><td>State</td><td>State where passport was issued. Enter DC (District of Columbia. All official and diplomatic passports are processed in the District of Columbia.</td></tr>
<tr><td>City</td><td>City where passport was issued. Enter Washington.</td></tr>
<tr><td>Authority</td><td>Cite the authority of issuance of the passport. Enter MBR (member), DEP (dependent) or CIV (Civilian employees). The codes must be in all UPPERCASE letters. Only indicate MBR, CIV or DEP in this block.</td></tr>
<tr><td>Comment</td><td>Comments. Only indicate dependent’s name in the comment block.</td></tr>
</table>
Note: Some active duty or reserve members and civilian employees are authorized to possess more than one official/diplomatic passport at a given time. Enter the passport information for each passport in a separate row (press the (+) button to insert a new row).
</td></tr>
</table>

Continued on next page

Citizenship Status Changes/Passport Information, Continued

Passport information (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>To add dependent passport information press the (+) button to insert a new row. Enter the passport data for the dependent and click the save button. Remember to enter the dependent’s name in the “Comment” block. Repeat this step for each additional passport to be entered.

Example Passport Information Completed for Member (MBR) and two dependents (DEP)


Note: You will notice the plus (+) or minus (-) sign under the passport information (right side of the screen). Be careful, do not click the (+-) button on the Citizenship row.</td></tr>
<tr><td>3</td><td>Click the Save button. The transaction is now complete.</td></tr>
</table>

Continued on next page

Citizenship Status Changes/Passport Information, Continued

JUMPS Effect

When a member's citizenship status is changed, this transaction updates the following in JUMPS:

- Segment 64, Federal Tax Data
- Segment 66, State Tax Data.

No JUMPS transactions are generated when Passport Information is added or updated.

Corrections and Deletions

Corrections and Deletions are not allowed. A new transaction is generated each time the Identification Data page is changed and saved. Update the page with the member's correct citizenship status and save it to rectify an incorrect or erroneous entry.

Non Self-Service Diversity Update

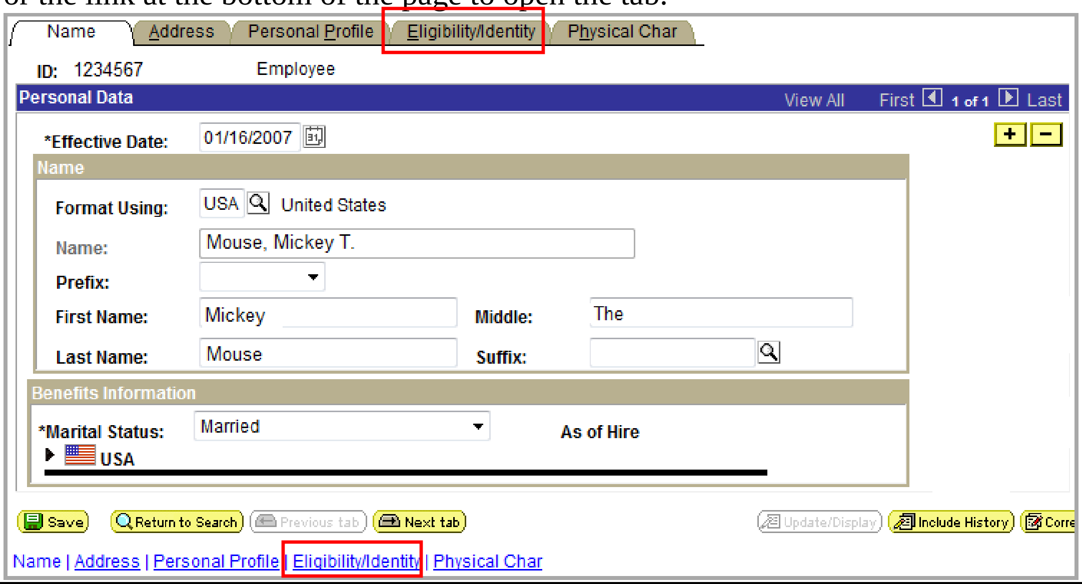
Introduction

This section provides the procedure for using PeopleSoft/DA to enter or update a member's diversity information.

Procedure

Follow these steps to view and/or update diversity information upon receipt of a completed *CG-5200, Ethnicity and Race Self-Reporting Worksheet* from the member.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > USE > Personal Data</td></tr>
<tr><td>2</td><td>The Personal Data component will display. Click the "Eligibility/Identity" tab title or the link at the bottom of the page to open the tab.

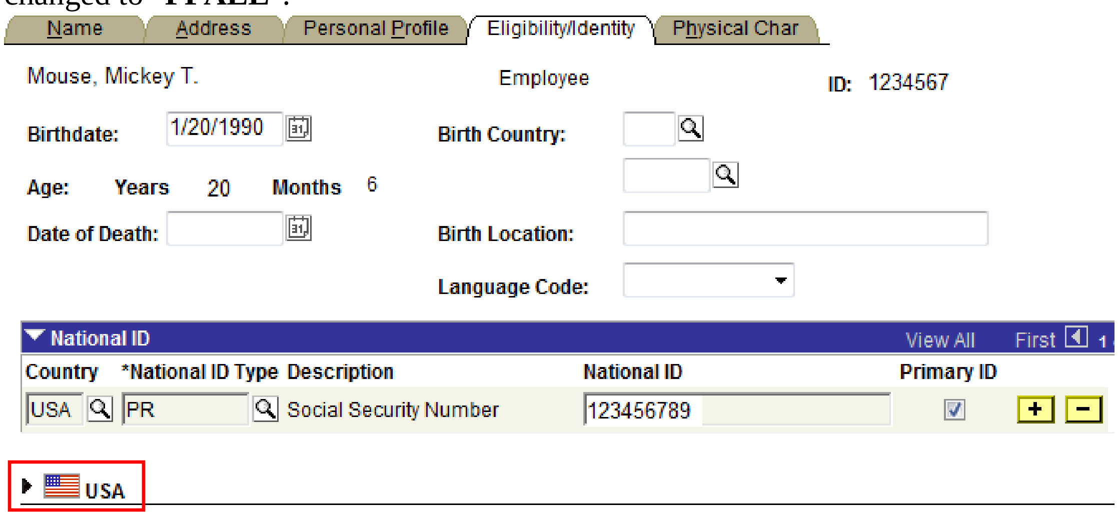


</td></tr>
</table>

Continued on next page

Non Self-Service Diversity Update, Continued

Procedure (continued)

Step	Action
3	The **Eligibility/Identity** tab will open. Diversity Data is recorded on the lower portion of the page. • **Click the USA icon to display the data entry area.** If the USA is not accessible to you, please contact PSC Customer Care. You user account setup needs to be corrected. The *Primary Permission List* needs to be changed to "**PPALL**". 

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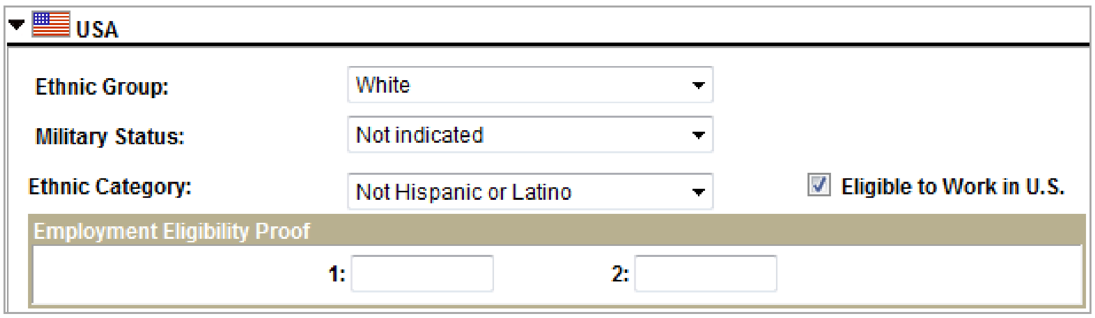
Non Self-Service Diversity Update, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click the drop-down menu in the Ethnic Group line and choose a diversity description from the list. Refer to the Ethnicity and Race Self-Reporting Worksheet and the table below to determine the diversity description.

</td></tr>
<tr><td>5</td><td>Click on the drop down-menu in the Ethnic Category line and select a category. Refer to the Ethnicity and Race Self-Reporting Worksheet to determine the category to select.
<table>
<tr><th>If</th><th>Then set the Ethnic Category to…</th></tr>
<tr><td>YES</td><td>Ethnic Category: Hispanic or Latino</td></tr>
<tr><td>NO</td><td>Ethnic Category: Not Hispanic or Latino</td></tr>
<tr><td>NA</td><td>Ethnic Category: Declined to Comment</td></tr>
</table></td></tr>
<tr><td>6</td><td>Click Save at the bottom of the page to save your work.</td></tr>
<tr><td>7</td><td>The procedure is complete.</td></tr>
</table>

Continued on next page

Non Self-Service Diversity Update, Continued

Ethnic-Groups:

Asian, Black or African American, Native Hawaiian or Other Pacific Islander and White	AS/BK/AA/NH/PI/Wht	1
Asian, Black or African American and White	Asian, Black/African Am, Wht	2
Asian and Native Hawaiian or Other Pacific Islander	Asian, Nt Hawaiian, Pac Isl	3
Asian, Native Hawaiian or Other Pacific Islander and White	AS/NH/OPI/Wht	4
Asian and White	Asian, White	5
Black or African American and Native Hawaiian or Other Pacific Islander	BK/Nat Haw/Pac Islander	6
Black or African American, Native Hawaiian or Other Pacific Islander and White	BK/AA/NH/OPI/Wht	7
Black or African American and White	Black or African Am, White	8
Native Hawaiian or Other Pacific Islander and White	Nat Hawaiian or Pac Isl, Wht	9
American Indian or Alaska Native	American Indian/Alaska Native	A
Asian	Asian	Asian
Black or African American	Black or African American	C
Native Hawaiian or Other Pacific Islander	Nat Hawaiian/Pacific Islander	D
White	White	White
Dont want to answer	Declined to Respond	Declined
Dont know	Identification Pending	ID Pending
American Indian or Alaska Native and Asian	Am Ind/AK Native/Asian	H
American Indian or Alaska Native, Asian and Black or African American	AInd/AKNat/AS/BK/AA	I
American Indian or Alaska Native, Asian, Black, African American and Native Hawaiian or Other Pacific Islander	AI/AN/AS/BK/AA/NH/OPI	K
American Indian or Alaska Native, Asian, Black, African American, Native Hawaiian or Other Pacific Islander and White	AI/AN/AS/BK/AA/NH/PI/W	L
American Indian/Alaska Native, Black, African American, Asian and White	AM/AN/AS/BK/AA/White	M
American Indian/Alaska Native, Asian and Native Hawaiian or Other Pacific Islander	AI/AN/AS/NH/PI	N
American Indian/Alaska Native, Asian, Native Hawaiian or Other Pacific Islander and White	AI/AN/AS/NH/OPI/White	P
American Indian/Alaska Native, Asian and White	AM Ind/Ak Nat/Asian/White	Q
American Indian/Alaska Native and Black or African American	AM Ind/AK Nat/Black/Afr Am	R
American Indian/Alaska Native, Black or African American and Native Hawaiian or Other Pacific Islander	AI/AN/BK/AA/NH/OPI	S
American Indian/Alaska Native and Black, African American and Native Hawaiian or Other Pacific Islander and White	AI/AN/B/AA/H/PI/White	T
American Indian/Alaska Native, Black, African American and White	Am Ind/AKNat/Bk/AfAm/White	U
American Indian/Alaska Native and Native Hawaiian or Other Pacific Islander	Am Ind/AKNat/NHaw/OPacIsl	V
American Indian/Alaska Native, Native Hawaiian or Other Pacific Islander and White	AI/AN/NH/OPI/Wht	W
American Indian/Alaska Native and White	Am Ind/AK Nat/White	X
Asian and Black, African American	Asian/Black/African Am	Y
Asian, Black, African American, Native Hawaiian or Other Pacific Islander	AS/BK/AA/NH/OPI	Z

Statement of Creditable Service

Introduction

This section provides the procedure for **viewing** a member's Statement of Creditable Service (SOCS). A SOCS request must be sent to PSC (SES) whenever a member with prior service is accessed into the Coast Guard or Coast Guard Reserve. Prior service data is entered by the SPO on the Applicant Contract Data page as part of the accession process. Chapter 5-C of the Personnel and Pay Procedures Manual, PSCINST M1000.2a lists other times when a SOCS request must be submitted and provides the procedure.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Note:

View Access to this page is limited to users at SPOs (Servicing Personnel Offices) and CGPC who have the CGHRS user role. Users at CG PSC (SES) who have the PSC Service Dates (CGPSCSD) role may enter and update information on this page.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): **Administer Workforce** > **Administer Workforce (GBL)** > **Use** > **Statement of Creditable Svc** Enter the member's employee ID number and click the search button. Select the member you want to view data on from the search results list. When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.

Continued on next page

Statement of Creditable Service, Continued

Procedures: (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>
The SOCS page will display. There are three tabs on this page:
1. The Statement of Creditable Svc tab
2. The Prior Service tab.
3. The Prior Payments tab.

Example:


<table>
<tr><td>Field</td><td>Description</td></tr>
<tr><td>SOCS Date</td><td>Date PSC (SES) completed verification of prior service information.

Note: If this field is blank and the member has prior service or disputes the service dates, submit a request for a Statement of Creditable Service, along with supporting documentation to PSC (SES) in accordance with Chapter 5-C of the Personnel and Pay Procedures Manual, PSCINST M1000.2a.</td></tr>
<tr><td>Pay Entry Base Date</td><td>Member's Pay Base Date. A Pay Base Date is the actual or constructive date of original entry in the service, which is creditable for pay purposes.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Statement of Creditable Service, Continued

Procedures: (continued)

Step	Action	
2 (con't)	Field	Description
	Effective Date Pay Allowances	Date member became entitled to pay and allowances.
	Active Duty Base Date.	Member's Active Duty Base Date. The Active Duty Base Date is the date on which seniority for retirement begins. Only active time is used.
	Anniversary Date	Reserve Anniversary Date (Reserve members). • For reservists without prior service, the Anniversary Date shall be the date of enlistment/appointment. • For reservists with prior service: 1. If there is no break in service, AY date is the date the member first entered into active service or into active status in a Reserve component. (A break in service is defined as a period greater than 24 hourscivilian status, on the inactive status list, or in the Retired Reserve.) 2. If there is a break in service, the AY date is the date the member is re-entering in the Reserve component.
	Expected Loss Date	This is the date a member is expected to be lost from DA/JUMPS. For regular enlisted members, this will be the expected discharge/retirement date. For regular Coast Guard officers and recalled retirees, this will be equal to the Expected Active Duty Termination Date. For NOAA officer O-6 and below, this will be the day before the 60th birthday; and for NOAA officers O-7 and above, this will be the day before the 62nd birthday. For reserve enlisted members, this will be the expiration of enlistment including any agreements to extend or re-extend and any retention beyond expiration of enlistment. For reserve officers, this should be the day before the officer's 60th birthday.

Continued on next page

Statement of Creditable Service, Continued

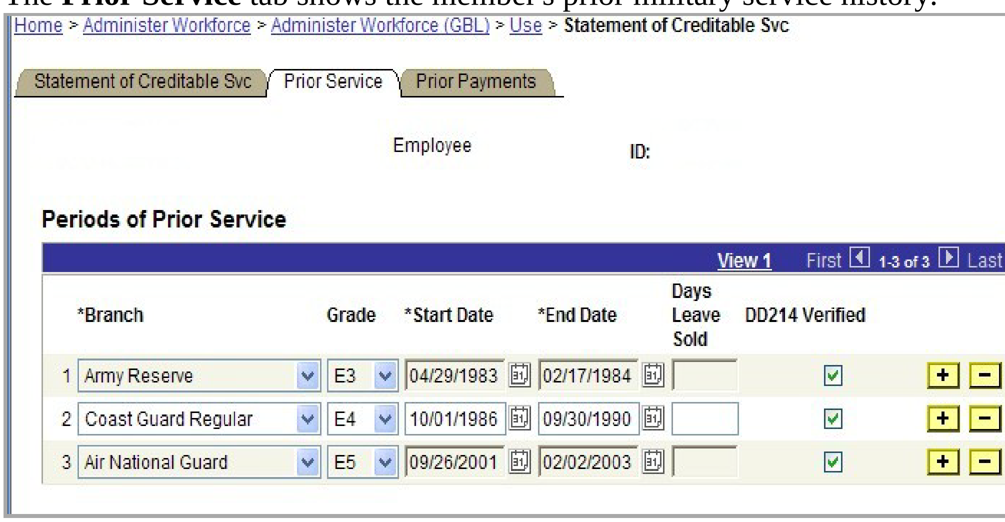
Procedures: (continued)

Step	Action	
2 (con't)	Field	Description
	Expected Active Duty Term Date	Expected Active Duty Termination Date. This is the date a regular member, reserve member on active duty (paid by JUMPS), or a recalled retiree is expected to be released from active duty. For regular enlisted personnel, this is the date the active duty obligation is expected to be fulfilled based on latest enlistment/reenlistment contract including voluntary and involuntary extensions of enlistment. For regular Coast Guard officers and reserve officers on extended active duty, this is the mandatory retirement date or later, or the date of completion of contracted or obligated service as set by Commandant. For NOAA officer O-6 and below, this will be the day before the 60th birthday; and for NOAA officers O-7 and above, this will be the day before the 62nd birthday. For reserve officers not on extended active duty, all reserve enlisted members, and recalled retirees (regular and reserve), this is the date the member is expected to be released from active duty when currently on active duty and paid by JUMPS.
	Expected Loss Date	This is the date a member is expected to be lost from DA/JUMPS. For regular enlisted members, this will be the expected discharge/retirement date. For regular Coast Guard officers and recalled retirees, this will be equal to the Expected Active Duty Termination Date. For NOAA officer O-6 and below, this will be the day before the 60th birthday; and for NOAA officers O-7 and above, this will be the day before the 62nd birthday. For reserve enlisted members, this will be the expiration of enlistment including any agreements to extend or re-extend and any retention beyond expiration of enlistment. For reserve officers, this should be the day before the officer's 60th birthday.
	Military Entry Date	The date of the member's initial entry into the Armed Forces. Includes both active and inactive service, as well as time spent at a military academy, in OCS, or under a delayed enlistment program. Used in calculating a member's retired pay percentage. DMOI is not currently updated for deductible time.

Continued on next page

Statement of Creditable Service, Continued

Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2
(Con't)</td><td>
<table>
<tr><td>Field</td><td>Description</td></tr>
<tr><td>Date Entered Current AD</td><td>Date the member entered their current active duty period.</td></tr>
<tr><td>Date Completed Military Obligation</td><td>Date member's completes or will complete their initial military obligation. If the military obligation of the member has expired, the date it expired will be displayed..
Note 1: All members originally enlisting on or after 1 September 1984 have an eight-year military obligation.
Note 2: Military obligation can be fulfilled in one of two ways:
1. By being discharged from a service component
2. By serving any combination of active and/or reserve service in any Armed Forces service or reserve component</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>The Prior Service tab shows the member's prior military service history.


The
The following information is displayed for each period of service:
<table>
<tr><td>Field</td><td>Description</td></tr>
<tr><td>Branch</td><td>Branch of service:</td></tr>
<tr><td>Grade</td><td>Highest Grade held in prior service.</td></tr>
<tr><td>Start Date</td><td>Date service began</td></tr>
<tr><td>End Date</td><td>Date of separation.</td></tr>
<tr><td>Days Leave Sold</td><td>Number of days and half-days of leave sold</td></tr>
<tr><td>DD214 Verified Flag</td><td>Prior service has been verified if checked.</td></tr>
</table>
</td></tr>
</table>

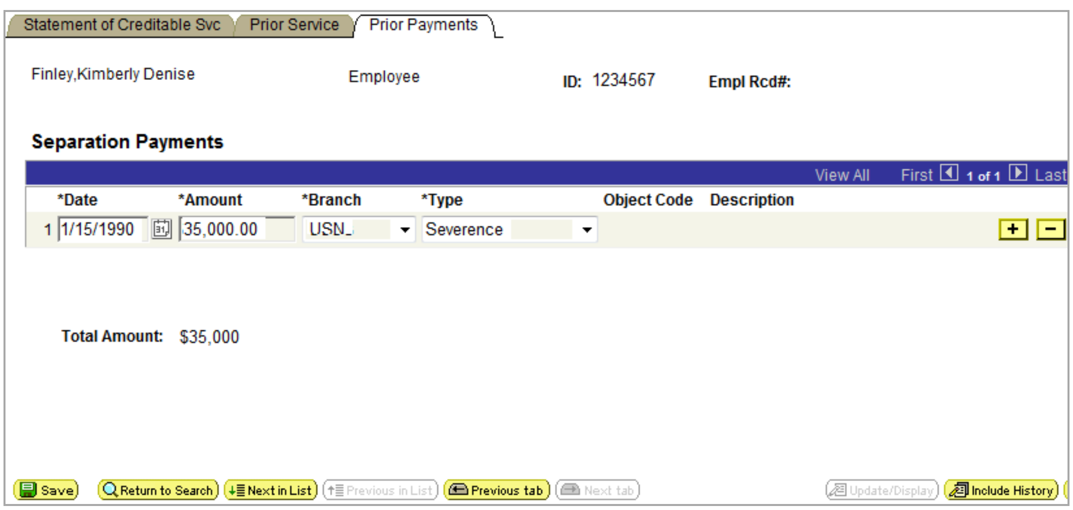
Continued on next page

Statement of Creditable Service, Continued

Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3
(Con’t)</td><td>The Reserve Anniversary Dates section shows the history of any Anniversary Date changes.

</td></tr>
<tr><td>4</td><td>The Prior Payments Tab. When a member separates from a military service and receives any form of separation or severance or readjustment pay, then later re-enters the military service the member doesn't have to immediately repay the prior separation/severance/readjustment pay. However, if the member stays in the service and later retires, then he/she is required to make reimbursement for the severance/separation/readjustment payment. A summary of the law/regulation on this is contained in chapter 4 of the DOD Retired Pay Manual at: http://www.defenselink.mil/comptroller/fmr/07b/07b_04.pdf.



</td></tr>
</table>

Continued on next page

Statement of Creditable Service, Continued

Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(Con't)</td><td>The following information is displayed for any Prior Payments made:
<table>
<tr><td>Field</td><td>Description</td></tr>
<tr><td>Date</td><td>Date of separation or other payment</td></tr>
<tr><td>Amount</td><td>Dollar amount of payment</td></tr>
<tr><td>Branch</td><td>Branch of service</td></tr>
<tr><td>Type</td><td>Type of payment (Readjustment, Separation or Severance)</td></tr>
<tr><td>Object Code</td><td>Code used to identify the payment type in JUMPS. See Part IX, JUMPS, this manual for a listing of Object Codes.</td></tr>
<tr><td>Description</td><td>Description of the Prior Payment type based on the Object Code selected.</td></tr>
<tr><td>Total Amount</td><td>Total of all prior payments listed.</td></tr>
</table>
</td></tr>
</table>

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Member Email Address

Introduction

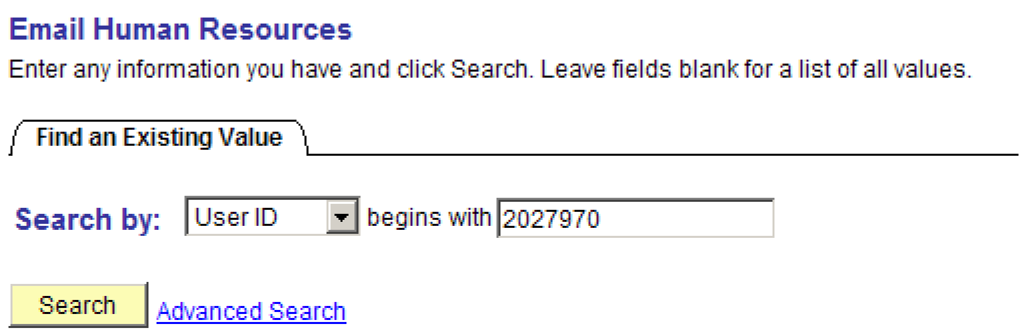
This section provides the procedure for entering and updating a member's Email address.

Procedure

Member email addresses are be stored in the DA II (PeopleSoft 9.x) environment (other HR data is currently stored in the DA I (PeopleSoft 8 environment).

SPO users will find the administration page for user Email Addresses under the Servicing Personnel Office group box on the portal home page:

From this page they will be able to search on users:

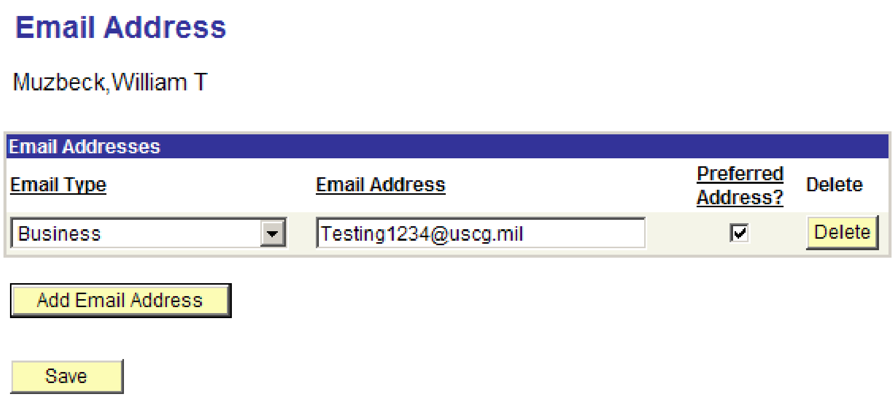


They can then add/change email addresses for users as necessary:

Continued on next page

Member Email Address, Continued

Procedure (cont'd)



- Every member must have a "Business" email address type.
- The "Business" email address type must be marked as the "Preferred Address"
- Only the email extensions (domains) of **.mil**, **.gov**, and **.edu** may be used in the Business Email Address field of DA. The use Internet webmail (Gmail, Yahoo, AOL, etc.) or other personal email account is not authorized. However, Internet webmail and other personal email addresses may be added using Email Types of other than Business.
- Be sure to save changes before leaving the Email Address page.

PPC SPO Manual
Part III, General Transactions
Chapter 9, Physical Characteristics
(Height Weight Measurement)

Overview

Ref (a) Allowable Weight Standards for Coast Guard Military Personnel, COMDTINST M1020.8 (series) (As amended by current ALCOAST in effect.)
(b) Coast Guard Personnel Manual, COMDTINST M1000.6 (series), Chapter 3
(c) Direct Access Bonus Maintenance Instructions (SPOs)

Introduction

This section provides procedures for using Direct Access to record a member's physical characteristics information.

Purpose

The Physical Characteristics page is used to record a member's hair color, eye color, height, weight, and other physical characteristics.

Key Points

Keep these key points in mind when entering height and weight measurements:

- Be sure to enter the correct Maximum Allowable Weight (MAW) from the tables in COMDTINST M1020.8G (Section 7.2) as amend by the most current ALCOAST in effect.
- Do not input half pounds (e.g. 212.5 lbs). Direct Access does not account for the decimal and makes the weight read as 2125 lbs. When determining MAW, a member's height and weight data must be rounded to the nearest whole number (e.g., 65.5 equals 66 or 215.4 equals 215).
- If a member exceeds maximum weight, but does not exceed the maximum percent body fat standard, then the member is in compliance with MAW standards. **Therefore, the Weight Over field would be zero (0)**, because the member is not overweight. However, the MAW field should still be completed with the member's MAW from COMDTINST M1020.8G (Section 7.2) as amend by the current ALCOAST in effect.

Continued on next page

Overview, Continued

When to Use This Transaction

Physical characteristics should be entered upon accession, semiannually when the member is weighed, and within 30 days prior to class convening when the member is ordered to resident training (ALCOAST 468/09). The page must be updated if the member exceeds the MAW standards and again when (if) the member meets MAW standards. All data, regardless of a member's compliance or non-compliance with weight standards, and irrespective of the scheduling or completion of any medical referrals, shall be recorded via Direct Access within 15 days after the end of each weigh-in period.

Maximum Allowable Weight (MAW) standards can be found in COMDTINST M1020.8G (Section 7.2) as amend by the most current ALCOAST in effect.

- Per reference (b) bonus payments are suspended until the member is in compliance with MAW standards. This transaction will automatically suspend any future bonus payments when the Weight Over field is other than zero. Bonus payments will not resume until "Remove Suspension to Bonus" transaction is submitted by the Servicing Personnel Office (SPO). See reference (c).

Note: If a member exceeds maximum weight, but does not exceed the maximum percent body fat standard, then the member is in compliance with MAW standards. Therefore, the Weight Over field would be zero, because the member is not overweight. However, the MAW field should still be completed with the member's MAW from COMDTINST M1020.8G (Section 7.2) as amend by the current ALCOAST in effect.

Physical Characteristics Query

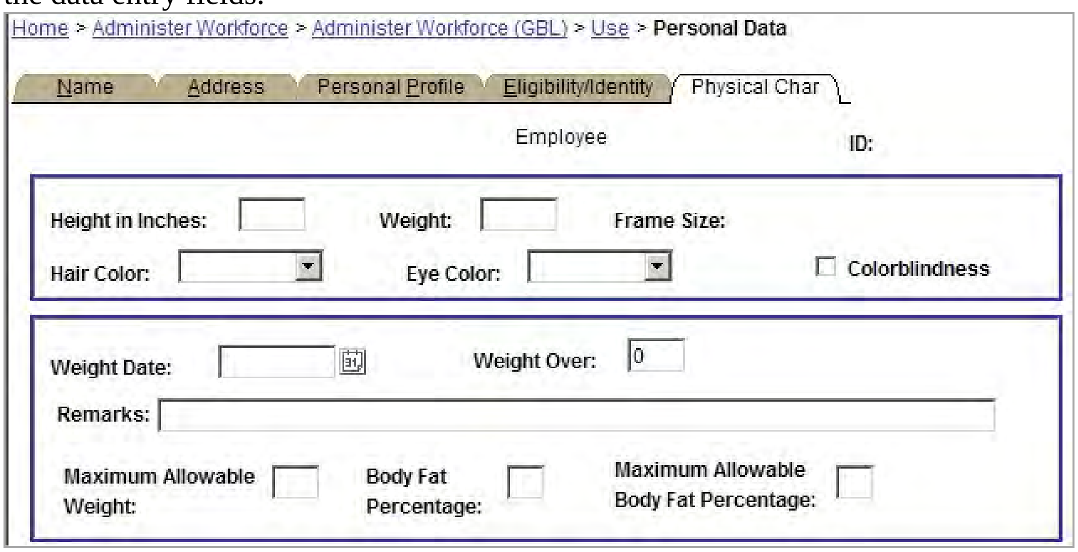
The Physical Characteristics Query provides units with CG weight standard related details for everyone at their command.

Continued on next page

Procedure

Procedures

Start Internet Explorer, sign into Direct-Access and follow these steps to complete this procedure.

Step	Action
1	Select the following menu path to begin this transaction: Administer Workforce > Administer Workforce (GBL) > Use > **Personal Data** 1. Enter the member's employee ID number in the Emplid field or their SSN in the Social Security Number field of the *Find an Existing Value* page. 2. Click the search button. **When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.**
2	The Personal Data page will display. Click on the "**Physical Cha**r" tab to access the data entry fields. 

Continued on next page

Procedure, Continued

Procedures (continued)

Step	Action
2 (con't)	Complete the Data Fields as described below:

Field	Entry
*Height in Inches	Height measurement (e.g. 67 for 5'7"). The member's height data must be rounded to the nearest whole number (e.g., 65.4 equals 65, 65.5 equals 66. The system will round height if user enters a value to the right of the decimal.) **Note**: User will receive an error if they try to submit weight change and the height is blank. They will receive a warning message if height entered is less than 48'' or more than 84''.
*Weight	Weight in pounds. The member's weight data must be rounded to the nearest whole number (e.g., 215.4 equals 215, 215.5 equals 216. The system will round weight if user enters a value to the right of the decimal.). **Note**: User will receive a warning message if weight entered is less than 70 or more than 350 lbs.
Hair Color	Click the drop-down arrow to select
Eye Color	Click the drop-down arrow to select
Colorblindness	Check if applicable
*Weight Date	Date the member was weighed. • **Very Important:** Remember to enter the date of the most recent weigh-in. The system will have the date of the last weigh-in, you need to change this in order to record a new weigh-in. Leaving the old date causes errors in the pay system (JUMPS). • There is an edit to prevent user from entering a future dated weight date.

* Required fields, cannot be left blank

Continued on next page

Procedure, Continued

Procedures (continued)

Step	Action	
2 (con't)	Field	Entry
	Weight Over	Always enter **"0" unless** the member exceeds **<u>both</u>** the Maximum Allowable Weight and the Maximum Allowable Body Fat Percentage standards. If the member exceeds both weight and body fat standards, enter the number of pounds the member is over their MAW. **Very Important:** If a member exceeds maximum weight, but does not exceed the maximum percent body fat standard, then the member is in compliance with MAW standards. Therefore, the Weight Over field would be zero, because the member is not overweight.
	Remarks	Reason the member was weighed and/or remarks. Examples: Exemption - pregnant or smoking cessation, Semi-Annual, Received orders for Resident Training
	* Required Fields, cannot be left blank.	

Continued on next page

Procedure, Continued

Procedures (continued)

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td rowspan="5">2
(con't)</td><td>Field</td><td>Entry</td></tr>
<tr><td>Maximum Allowable Weight</td><td>Enter the correct Maximum Allowable Weight (MAW) from the MAW listed in the most current ALCOAST in effect. Use the MAW from the instruction/ALCOAST even if the member exceeds that weight but does not exceed the Maximum Allowable Body Fat Percentage.</td></tr>
<tr><td>Body Fat Percentage</td><td>If member exceeds their MAW, enter the member's body fat percentage. This field is required for members who exceed their maximum allowable weight.</td></tr>
<tr><td>Maximum Allowable Body Fat Percentage</td><td>The maximum allowable body fat percentage for the member as listed in the most current ALCOAST in effect.</td></tr>
<tr><td colspan="2">* Required Fields, cannot be left blank</td></tr>
<tr><td>3</td><td colspan="2">Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.

Review the following key points:
Be sure to enter the correct Maximum Allowable Weight (MAW) from the most current ALCOAST in effect.
Do not input half pounds (e.g. 212.5 lbs). Direct Access does not account for the decimal and makes the weight read as 2125 lbs. When determining MAW, a member's height and weight data must be rounded to the nearest whole number (e.g., 65.5 equals 66 or 215.4 equals 215).
No administrative remarks are required if the member is found to be fully compliant with MAW or maximum allowable body fat standards.

Very Important: If a member exceeds maximum weight, but does not exceed the maximum percent body fat standard, then the member is in compliance with MAW standards. Therefore, the Weight Over field would be zero (0), because the member is not overweight.</td></tr>
<tr><td>4</td><td colspan="2">Click the Save button. The transaction is now complete.</td></tr>
</table>

Continued on next page

Procedure, Continued

JUMPS Effect

This transaction updates the following in JUMPS **if the Weight Over field is other than zero:**

Segment 30 (suspense flag). Suspend Enlistment Bonus payments.
Segment 42 (suspense flag). Suspend SRB payments.

A "Remove Suspension to Bonus (Reference (c))" transaction must be submitted to remove the suspense flag from the bonus segments. Notify the Servicing Personnel Office (SPO) when the member meets complies with weight standards so the Remove Suspension to Bonus transaction can be submitted.

Corrections and Deletions

Corrections and Deletions are not allowed. A new transaction is generated each time the page is changed and saved. Update the page with the member's correct height & weight information and save it to rectify an incorrect or erroneous entry.

Reminder: A "Remove Suspension to Bonus" transaction must be submitted (by the responsible Servicing Personnel Office) to remove the suspense flag from the bonus segment if the Weight Over field was filled in with anything other than "0".

PPC SPO Manual

Part III, General Transactions

Chapter 10, Reporting Death of a Member

Overview

Introduction

This transaction is used to stop pay and allowances following the death of a member.

Timing

Submit this transaction upon receipt of a personnel casualty report message indicating the death of a member of the U. S. Coast Guard, U. S. Coast Guard Reserve or NOAA Commissioned Officer Corps. Do not submit this transaction to report the death of a retiree, unless the retiree was serving on a recall to active duty (e. g. Being paid via JUMPS) at the time of death. PSC (RAS) must be notified in the event of the death of a retiree.

Corrections/ Deletions

This transaction can be deleted. The ***Date of Death*** and ***Line of Duty*** fields can be corrected.

Note: The delete row button -  is used to delete erroneous transactions after they have been saved.

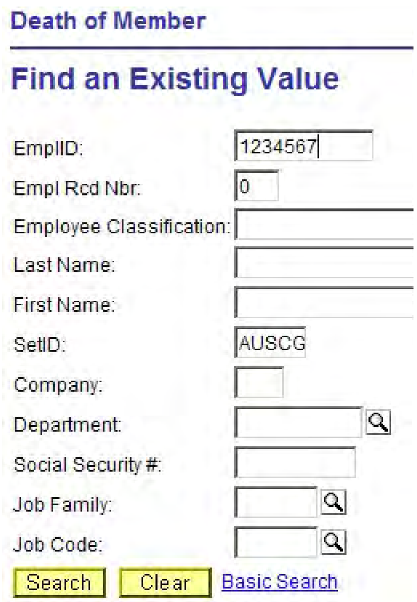
Reference

Chapter 5-A of the Personnel and Pay Procedures Manual, PSCINST M1000.2(series), provides unit procedures for casualty reporting. Enclosure (7) of the manual provides example Personnel Casualty Report messages.

Continued on next page

Report Death of a Member, Continued

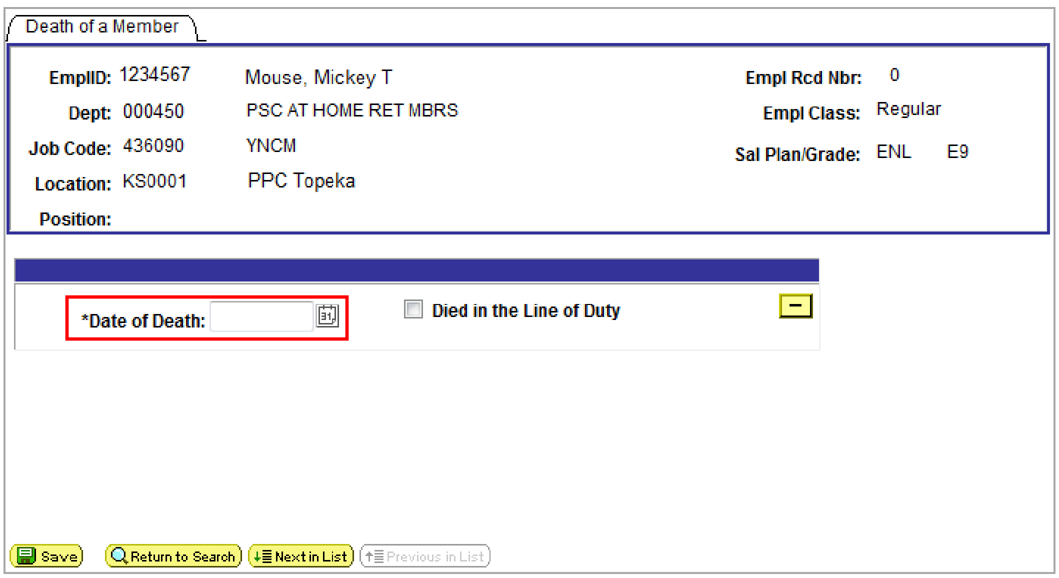
Procedure Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Administer Workforce > Administer Workforce (GBL) > Use > **Death of Member** Enter the Employee ID in the EmplID field and click the search button. Review the search results and select the member from the list.  When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.

Continued on next page

Report Death of a Member, Continued

Procedure (continued)

Step	Action
2	Complete the following fields: 1. Enter the date of death (MM/DD/YYYY format) (Item "DELTA" on the Personnel Casualty Report Message). 2. Mark the "**Died in the Line of Duty**" checkbox if the member's Commanding Officer has determined death to be "Line of Duty" (Item "KILO" on the Personnel Casualty Report Message).  Note: The delete row button - is used to delete erroneous transactions after they have been saved.
3	Click the Save button, supervisor approval is not required.