PPC SPO Manual

VIII, Accessions

Overview

Introduction

This part provides guidance on the entire Accession process.

Contents

This part contains the following topics:

Enclosures

This part also contains the following enclosures:

- Enclosure 1 – Accession Document Checklist
- Enclosure 2 – Accession Checklists for SPOs and Accession Points
- Enclosure 3 – Accession Tips Problems and Error Messages
- Enclosure 4 – Case Studies

Accessions

PPC SPO Manual

Part VIII, Accessions

Chapter 1, Accessions Overview

Overview

Introduction

This section describes the types of accessions, assigns responsibility for data entry associated with accessions, and provides an overview of the accession process in Direct Access.

In this chapter

The following topics are covered in this chapter.

Before You Begin

Introduction

This section provides helpful information you should know BEFORE you attempt to process an accession.

Submit a request for statement of creditable service for all personnel claiming prior service

A Statement of Creditable Service (SOCS) request must be sent to PPC (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 as part of the accession process. Page 5-C-5 of the Personnel and Pay Procedures Manual, PPCINST M1000.2a provides the procedure and lists other times when a SOCS request must be submitted.

For PPC (SES) to generate an accurate service statement all prior service documentation should be scanned and emailed to PPC Customer Care. This includes all contracts and all discharge documents including DD-214's and NGB 22 and 23's for National Guard members. (NGB Documents are the National Guard's version of the DD-214 and enlistment contracts). See http://www.uscg.mil/ppc/ses/socs.asp for more information.

When to complete an accession

An accession transaction is required when a person:

A. First becomes a member of the Coast Guard or Coast Guard Reserve.
B. Who was a member of the Coast Guard (active or reserve) rejoins the Coast Guard (active or reserve) following a break in service of more than 24 hours.
C. Is discharged from the Coast Guard (active duty) and immediately enlists in the Coast Guard Reserve.
D. Who is a member of the regular Coast Guard or Coast Guard Reserve receives a direct commission as an officer (other than CWO) through other than attendance of Officer Candidate School (OCS) or Reserve Officer Candidate Indoctrination (ROCI).
E. Is discharged from the Coast Guard Reserve and immediately enlists in the Coast Guard (active duty). Note that any accession of a person currently serving in the Coast Guard or Coast Guard reserve must be immediately preceded by a discharge from that component before the member can be accessed into the other component.

Continued on next page

Before You Begin, Continued

What to do if an error is discovered after accession is completed

Once the SPO has reviewed and approved the Accession, it is imperative that ALL data be verified correct on the same day.

- If erroneous data is discovered, submit a PPC Customer Care Trouble Ticket immediately, annotating what data fields are incorrect and what the data fields should read. Once you have received the auto confirmation e-mail with your ticket number, call Customer Care so that immediate action can be taken.
- Reviewing the data and alerting PPC of errors on the same day is important because PPC can correct the accession prior to the data loading into JUMPS. If errors are discovered after the Accession has processed into JUMPS, corrections are much more difficult and will lead to several weeks of pay problems for the member.

DA user roles for accessions

The CG Applicant Data (CGAPPL) user role is now required in order to generate an applicant ID and enter applicant data (See reference (b), Chapter 2-B and Chapter 3 for more information on these accession processing steps). The ability to perform these actions has been removed from the SPO Technician (CGHRS) and SPO Supervisor (CGHRSUP) user role permission lists.

The following user roles are required for accession processing:

Role(s)	**Responsibility/Access**
CGHRS with the CGAPPL add on	1. Generates Applicant ID number and job requisition number, if necessary. 2. Enters/Verifies applicant data: • Identification data • Education and test results • Contract data (type of accession, pay grade/rate/rating, term, service dates, prior service dates, etc.)
CGHRSUP	Hires Applicant
CGHRS*	Completes post hire processing (e.g.): • Tax Withholding • Payment Option Election • Reserve Orders and/or Endorsements on orders • Pay Entitlements • SGLI/FSGLI Elections

**CGHRSUP or CGHRS w/ CGAPPL is not prohibited from completing post hire processing.*

The Accession Process

Introduction

This section describes the accession process.

The Accession Process

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

Stage	What Happens	Who Does it
1	Vacancy identified	Headquarters program manager (COMDT CG-12)
2	Applicant is identified and recruited	Recruiting Command and Recruiting Office (or CGPSC for recalls).
3	Orders are issued	• Recruiting Office (for non prior service members or members with non-Coast Guard prior service and others who will report for indoctrination training prior to reporting to their first PDS)(these are "offline" orders to indoctrination training, not Direct Access PCS or EAD orders). These are "**Routine Accessions**". • CGPSC Assignment Officer (for members returning to active duty following a break in service of more that 24 hours and Direct Commission Officers and others who will not attend indoctrination training prior to reporting to their first PDS). (These are Direct Access PCS or EAD orders issued using the applicant's applicant ID or prior members employee ID number). These are **Non-Routine Accessions**".
4	Reports as ordered	Applicant
5	Applicant data is entered into the system	Data entry technician ("*CGAPPL" role user*) at the SPO for the Processing Point.
	Applicant is hired: • Personnel and pay records are created • Employee ID Number is generated, or reactivated if the applicant has prior Coast Guard service.	SPO supervisor at the SPO for Processing Point (CGHRSUP Role User). After the member is hired and an employee ID is available, transactions to effect the following are entered by the technician and approved by the supervisor (when required) • Pay, entitlements, tax withholding and direct deposit are started. Enrollment/Election completed for benefit programs (e.g. SGLI, MGIB, Family Dental, etc.)

New Hire or Rehire?

Introduction

This section discusses the terms “New Hire” and “Rehire”.

New Hire vs. Rehire

When a person first becomes a member of the Coast Guard or Coast Guard Reserve the 'New Hire' process is used.

When a person who has prior Coast Guard service (active or reserve component) rejoins the service, the 'Rehire' process is used.

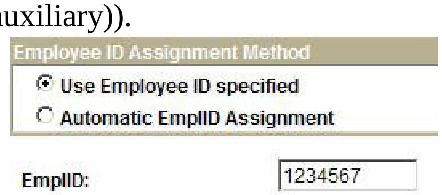
The Rehire process is also used if the person has an Employee ID number because of a NOAA commission, civilian employment with the Coast Guard or through membership in the Coast Guard Auxiliary.

How New Hire and Rehire Processes Differ

The key difference between the New Hire and Rehire processes is assignment of the member's Employee ID number.

The New Hire process generates a new Employee ID number.

The Rehire process makes use of the person’s previously assigned Employee ID number allowing the system to migrate historical data to the new enlistment/accession. The previously assigned Employee ID number must be entered on the Hire Applicant page and the '**Use Employee ID Specified**' radio button must be marked (*This is the default setting for all accessions, change it to "Automatic EmplID Assignment" when completing an accession for a person with no prior Coast Guard affiliation (NOAA,* active, reserve, civilian or auxiliary)).



The menu items (Develop Workforce> Recruit Workforce (GBL)> Use> Applicant Data, Applicant Contract Data and Hire Applicant) are the same in both the Hire and Rehire process.

Accession Types and Accession Processing Points

Introduction

These tables describe the types of accessions and identify processing points. The processing point is responsible for data entry.

Enlisted Accessions

This table describes enlisted accession scenarios. Enlistment programs leading to an Academy appointment or commission are also described.

Program/Status	Description	Processing Point(s)	Be Aware Of…
Regular Enlistment	RO > TRACEN > 1st PDS or "A" School	RECRUIT TRACEN	Possible E2/E3 if qualified for advance paygrade program. Possible Enlistment Bonus
Regular Enlistment Prior service non-CG and prior service CG who have been out of the service for more than 12 months	RO > TRACEN > 1st PDS	RECRUIT TRACEN	Rate & Rating, SOCS ADBD/PBD Request
Regular Enlistment Prior service CG who have been out of the service for less than 12 months	RO > PDS	SPO for PDS	Job Requisition # Rate & Rating Effective Date of Rating SRB if break in service < 3 months ADBD/PBD
Regular Enlistment current CGR member *Reserve Integration*	Home > PDS or Home > Processing Point > PDS	Could be SPO for current reserve assignment or SPO for PDS	Discharge from CGR
NAPS Program Current CG Member	RELAD to Dept ID 003862.	Current SPO (RELAD) & Academy SPO (IADT)	Reserve IADT. No change in rate.

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Accession Types and Accession Processing Points, Continued

Enlisted Accessions (cont'd)

Program/Status	Description	Processing Point(s)	Be Aware Of…
NAPS Program NPS or current CG SELRES	Home - NAPS	Academy SPO	Rate = E1C / 209898 DEPTID 003862 REQUISTION #: UNK. Reserve accession on IADT
CGRITS Program	Home > Academy INDOC > College Reserve accession on 24 months EAD using position # & department ID for school or 002160 (Search by school name in the Description field and "GD-T" (General Detail-Training) in Department Type Code field)	Academy SPO	Rate = SAOC (E2)/ 451097 Reserve accession into IRR Position # 00095687 DEPTID #002817 REQUISITION #145079
CSPI Program from Civilian Status	Active Duty Accession	RECRUIT TRACEN	Rate SN/E3 with 4yr AD commitment.
CSPI Program Current AD or CGR Member	Discharge > Active Duty Accession (*For an AD member, a rate adjustment, extension, and PCS would work as well.*)	Member's SPO	Rate SN/E3 (even if holding a higher rate in the CG) with 4yr AD commitment. Accession position # will be at a department ID 002160 (CSPI).
CMAPPP	Reserve Enlistment, REBI	RECRUIT TRACEN 60 DAYS IADT for REBI and summer cruise	E3 with 8-year OBLGSERV. Department ID for CMAPPP is 007995

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Accession Types and Accession Processing Points, Continued

Enlisted Accessions (cont'd)

Program/Status	Descripton	Processing Point(s)	Be Aware Of…
MARTP (This program is inactive according to RPM ch3)	Reserve Accession SELRES-A (Class M)	Academy SPO	E3 with 8-year OBLGSERV. Two weeks IADT at NAPS.
Former Cadet with active duty obligation	Active Duty Accession. PCS to new PDS	Academy SPO	Chap 1.E.4 CG PERSMAN provides additional details
Former Cadet with reserve obligation	Reserve Accession to IRR or SELRES if approved by RPM	Academy SPO	
OCS (not current CG member)	Enlist in CGR with IADT orders to OCS	Academy SPO	Rate: Former CG members = Rate held at time of separation. All others = SAOC. Advanced to OCUI2 on CCLVN Enlistment term 8 years if NPS, 4 years if PS. Enlist in the CGR with IADT orders to OCS.
Delayed Entry Program	Up to 365 days in the CGR before regular enlistment	RECRUIT TRACEN	Enlistment in CGR & Discharge to enlisted in Reg. component is recorded on the DD-4/1 only. The member's IMSO date is recorded at time of enlistment into the CG
CG Band	Active Duty Accession	Academy SPO (permanent party)	MU1 Rate

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Accession Types and Accession Processing Points, Continued

Enlisted Accessions (cont'd)

Program/Status	Description	Processing Point(s)	Be Aware Of…
Reserve Enlistment RQ (incl Prior CG w/break in service of more than 5 years. See Enlisted R-to-R below) RN RX	All attend REBI	RECRUIT TRACEN completes accession 23 days prior to CCLVN date and issues IADT orders	
Reserve Enlistment RA (this program is not listed in RPM but appears in RECRUITMAN)	Attend REBI	RECRUIT TRACEN completes accession 30 days prior to CCLVN date and issues IADT orders	Retained on AD if "A" school CCLVN is within 30 days of REBI completion, otherwise orders are terminated to IDT unit for IADT orders to "A" school w/in next 6 months
Reserve Enlistment RP RK	Attend basic training	RECRUIT TRACEN	IADT Orders

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Accession Types and Accession Processing Points, Continued

Enlisted Accessions (cont'd)

Program/Status	Description	Processing Point(s)	Be Aware Of…
SRDC (non CG/R)	SELRES DCO	SPO	Civilians (not incld. those with prior service but not in CGR) are accessed into the CGR as E2s and placed on ADT orders for 3-week ROCI. They are advanced to OCUI2 (E-5) upon ROCI CCLVN and commissioned upon graduation.
Enlisted R-to-R (RQ)	When an enlisted member, with no remaining MSO is **discharged** from the Regular Coast Guard and **Enlists** in the CGR	SPO for member's AD unit if enlisting within 24 hours of discharge. SPO for member's assigned IDT unit if enlisting with a break of more than 24 hours but less than 5 years.	Accessed in the CGR using position number provided by CGRC Members may also be directly enlisted into the IRR. Use Job Requisition number 145079 for all IRR accessions. This will hire the member to position number 00093786 at 002817/CGPSC RESERVE PERS MGMT.
Vacated Officer Appointment	If an officer's temp appointment vacated, he or she reverts to his or her permanent status. Discharge > AD Accession	SPO for the former officer's PDS.	

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Accession Types and Accession Processing Points, Continued

Cadet Accessions

This table describes cadet accession scenarios. Note that any member currently serving in the Coast Guard or Coast Guard Reserve must be discharged prior to appointment as a cadet.

Event	Description	Processing Point(s)	Be Aware Of…
Not current CG or CGR member	Appointed as a cadet	Academy SPO	
Current CG AD member	PCS to academy Discharged and appointed as a cadet	Academy SPO	Advance pay not authorized ICW PCS.
Current CG SELRES member	Discharged from CGR and appointed as a cadet.	Academy SPO	

Officer Appointments

This table describes officer accession scenarios.

<table>
<tr><th>Event</th><th>Description</th><th>Processing Point(s)</th><th>Be Aware Of…</th></tr>
<tr><td>R-to-R</td><td>Regular officer resigns (discharge) and applies (and is approved) for a reserve commission (SELRES accession)</td><td>SPO for the officer’s AD unit</td><td>Accessed in the CGR using position number provided by CGRC and Rank as listed on the Oath of Office. Officers may also be directly accessed into the IRR. Use Job Requisition number 145079 for all IRR accessions.</td></tr>
<tr><td>OCS Grad w/TEMP commission</td><td rowspan="2">DA Board Process will take care of discharge / appointment transactions</td><td rowspan="2">Academy SPO</td><td></td></tr>
<tr><td>OCS Grad w/Reserve commission</td><td>EAD Orders. Uniform Allowance Claims</td></tr>
<tr><td>Cadet Grad</td><td>DA Board Process</td><td>Academy SPO</td><td>Tax info must be on file in JUMPS.</td></tr>
</table>

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Accession Types and Accession Processing Points, Continued

Officer Appointments (cont'd)

Event	Description	Processing Point(s)	Be Aware Of…
ROCI Grad (RRDC and SRDC)	DA Board Process	Academy SPO	Uniform Allowance Claims
DCO from civilian status (incl prior service with a break in service	Reserve accession into the IRR/"P" up to 30 days prior to CCLVN. Begin EAD day prior to DCO CCLVN	Academy SPO	
DCO from current CG AD w/RESERVE commission	Discharge from AD with accession into the CGR up to 7 days prior to the CCLVN. Begin EAD immediately	SPO for member's AD unit	
DCO from current CG AD w/TEMP commission (includes Physician Assistant program)	Discharge with accession into the Regular CG (as an officer) up to 7 days prior to the CCLVN. TDY to DCO school, rtn to unit and PCS to new unit.	SPO for member's AD unit	

Continued on next page

Accession Types and Accession Processing Points, Continued

Officer Appointments (cont'd)

Event	Description	Processing Point(s)	Be Aware Of…
Physician Assistant program DCO from current CG AD w/TEMP commission	Discharge with accession into the Regular CG (as an officer) and PCS to new unit.	SPO for member's AD unit	On completing the prescribed medical training, active duty members normally are commissioned as temporary Regular officers in the grade of ensign. These officers incur an active duty obligation of three years of service for each year of training.
DCO from current SELRES w/RESERVE commission (Includes CMAPP)	Discharge from enlisted status followed by Reserve accession into the IRR/"P" up to 30 days prior to CCLVN. Begin EAD day prior to DCO CCLVN	SPO for member's assigned IDT unit	
MARTP Grad (This program in inactive according RPM ch3)	Discharge from enlisted status followed by Reserve accession into the SELRES if offered a SRDC	SPO for the geographic area of the State Maritime Academy	May be issued EAD orders for 3 years if offered DCO.

Chapter 2, Pre-Accession Processes

Chapter Overview

Introduction

This chapter provides the procedures for creating Job Requisition and Applicant ID numbers.

Timing

The pre-accession processes, described in this chapter are required for all accessions and must be completed before the Hire Process, which is described in chapter 3, can begin.

Responsibility

Routine Accessions:
For routine accessions (personnel reporting from civilian status to recruit training or OCS), blanket Job Requisition numbers have been created by PPC:

Program	Requisition #
Basic Recruit Training (Regular)	132673
Basic Recruit Training (Reserve)	147573
Depot Recruit Training (Reserve)	147574
OCS	133044
ROCI	135274
IRR	143655

The processing point SPOs at TRACEN Cape May and the Academy (ct3) will need to generate the Applicant ID numbers for these accessions (see chapter 11)

Non-Routine Accessions:
For non-routine accessions (personnel reporting directly to a field unit without first attending indoctrination training and personnel who must be discharged and re-accessed to change components or accept and appointment), Job Requisition numbers usually exist in the system for established positions (those that have been advertised on the shopping list). However, these requisitions may need to be reopened, by the processing point SPO, if they have been filled in the past. New positions will require a New Requisition number. SPOs may reopen or create Job Requisition numbers following the procedures in this chapter.

Continued on next page

Chapter Overview, Continued

Responsibility (continued)

CGRC will create Applicant ID numbers for non-routine accessions of Direct Commission Officers. Applicant ID numbers for other non-routine accessions must be created by SPOs following the procedures in this chapter.

Job Requisition Number for IRR

When processing an accession into the IRR use job requisition number 143655. Using this requisition number will hire the member to position number 00093786 at 002817/CGPC RESERVE PERS MGMT.

In this chapter

The following topics are covered in this chapter.

Chapter 2-A
Job Requisition Numbers

Chapter Overview

Introduction

This section provides the procedure for reopening and creating Job Requisitions.

Timing / Responsibility

A Job Requisition number is required in order to begin an Accession transaction. It is the first step in the accession process. CGPSC Assignment Officers create requisitions in connection with creating the Shopping List, so one may already exist for the accession you are processing.

SPO Supervisors can create and reopen Job Requisitions if one isn't available for the position number the member is assigned to. Due to the need to complete accessions in a timely fashion, it usually more efficient for the SPO to reopen or create the Job Requisition when needed. This also allows the SPO to set the rate/rank to match the member's contract.

Before You Begin

You need to know the following information before in order to complete this procedure:

1. The Position Number
2. The Department ID of the unit where the position is assigned
3. The Job Code (Rate/Rank) for the accession.

The Job Requisition component will allow you to search for these numbers and codes if necessary.

Job Requisition Number for IRR

When processing an accession into the IRR use job requisition number 145079. Using this requisition number will hire the member to position number 00095687 at 002817/CGPSC RESERVE PERS MGMT.

In this Section

Reopening a Job Requisition

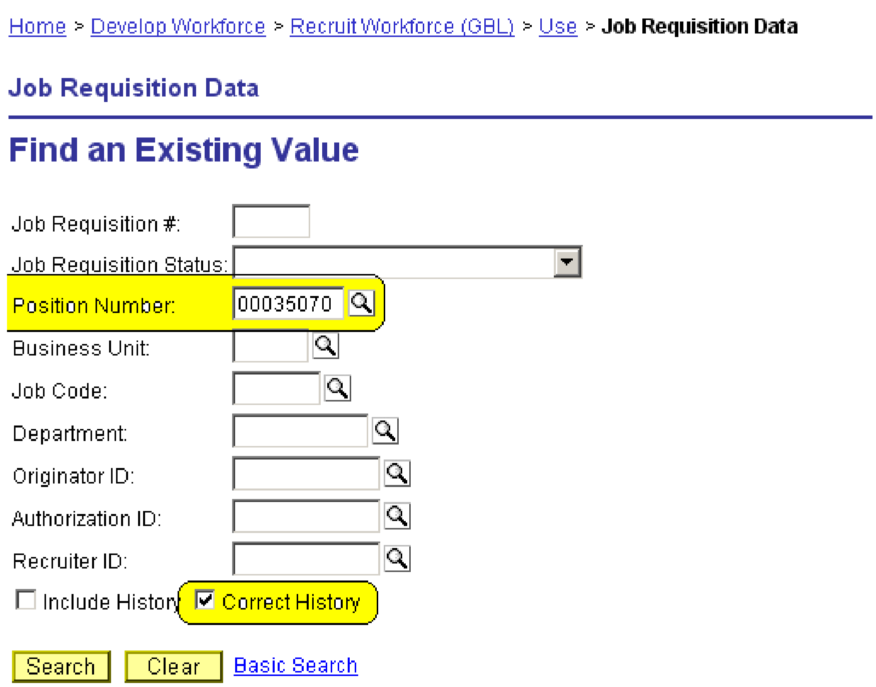
Reopening a Job Requisition

It is a good idea to search the system for an existing requisition before you create a new one.

Note: Contact PPC (adv) if the IRR Job Requisition number (145079) is closed. PPC will reopen the IRR Job Requisition number. Do not create new requisition numbers for IRR accessions.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to search for and reopen an existing job requisition.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Go to Home > Develop Workforce > Recruit Workforce (GBL) > Use > Job Requisition Data

</td></tr>
<tr><td>2</td><td>Enter the Position number in the Position Number field</td></tr>
<tr><td>3</td><td>Check the Correct History box</td></tr>
<tr><td>4</td><td>Click the Search button.</td></tr>
</table>

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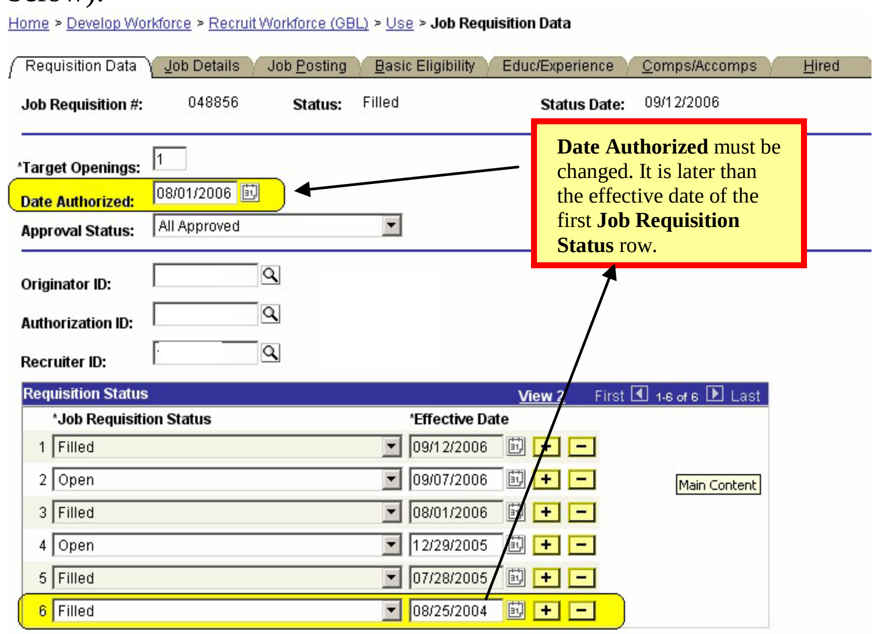
Reopening a Job Requisition, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>If no matching values are found, continue with the procedure in the next section (page 5) to create a new requisition. If a matching requisition is found, you may just need to change the status to "Open" so the SPO can complete the accession. The Requisition status is set on the first tab of the Requisition Data page.</td></tr>
<tr><td>6</td><td>Change the Date Authorized to the date of the oldest Job Requisition Status row (the applicable fields are marked in yellow below):

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

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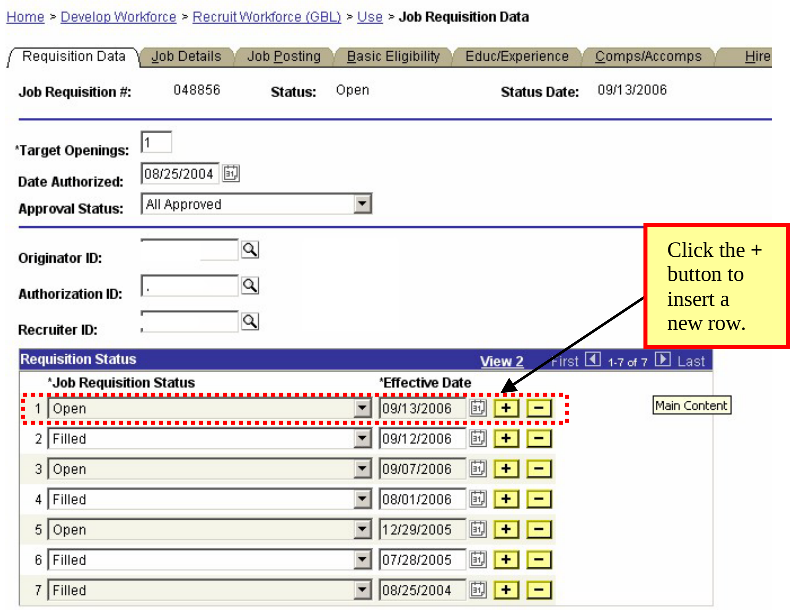
Reopening a Job Requisition, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Add a Row in the Job Requisition Status and set it to Open.


Be sure to set the Effective Date to a date prior to the Hire/Rehire Date.</td></tr>
<tr><td>8</td><td>Click Save. If you are not able to resolve any errors that occur when attempting to save, click Add and create a new requisition (the procedure is on the next page).</td></tr>
</table>

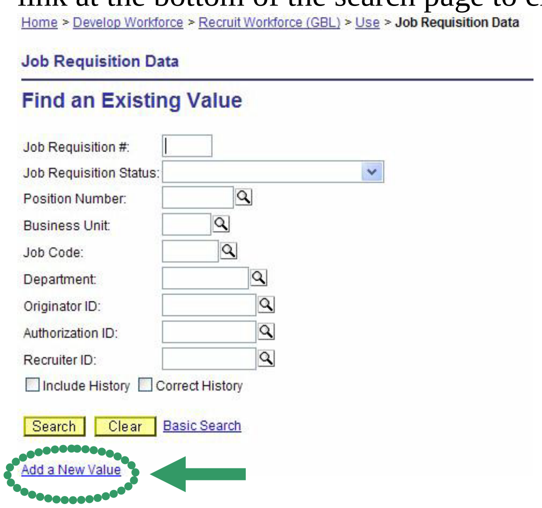
Creating a New Job Requisition

Introduction

This section provides the procedure for creating a job requisition number.

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 > Develop Workforce > Recruit Workforce (GBL) > Use > **Job Requisition Data**
2	The Find an Existing Value page will display. Click the "Add A New Value" link at the bottom of the search page to create a new requisition. 

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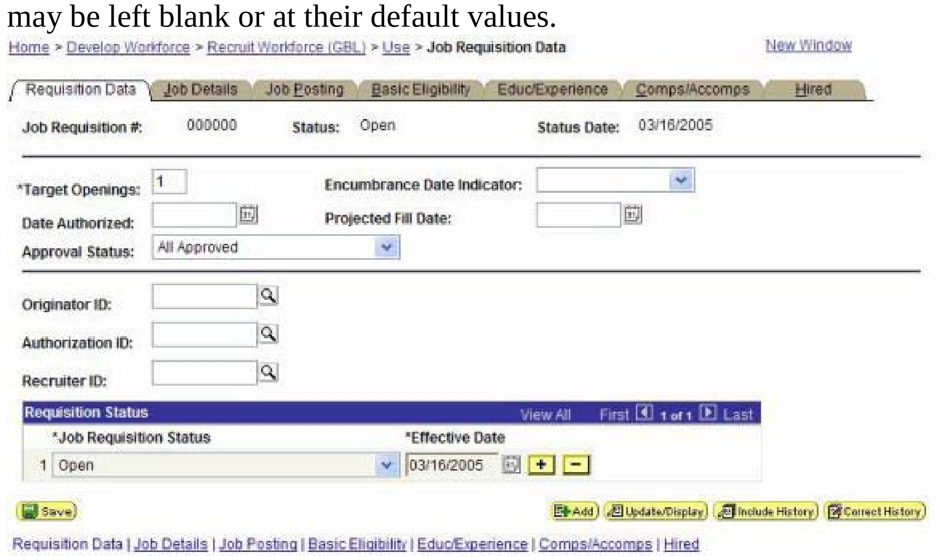
Creating a New Job Requisition, Continued

Procedure (continued)

Step	Action
3	Click the Add button (after clicking the Add a New Value link in step 2 above). • Leave the Job Requisition # field at its default value. It will be updated by the system when you save the new requisition. 
4	The Requisition Data page will display. There are several tabs. However only the first tab "**Requisition Data**" second tab "**Job Details**" need to have data entered in order to generate the Requisition number. The remaining fields/tabs may be left blank or at their default values.  1. Change the Effective Date field in the Requisition Status to a date equal or prior to the date the member will be accessed into the Coast Guard. The field defaults to today's date.

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Creating a New Job Requisition, Continued

Procedure (continued)

Step	Action
5	Click on the Job Details tab label to proceed.

Complete the following fields:

Field	Enter
Position Number	The Position Number
Business Unit	"AUSCG"
Department	The department ID number for the unit where the position is assigned. Click the lookup icon to perform a search if you do not know the code.
Job Code	The code for the rank/rate of the position. Click the lookup icon to perform a search if you do not know the code.
Salary Administration	Enter OFF for Officer, ENL for enlisted, OFE for an officer with over 4 years active duty enlisted time.
From Grade	Enter the paygrade.

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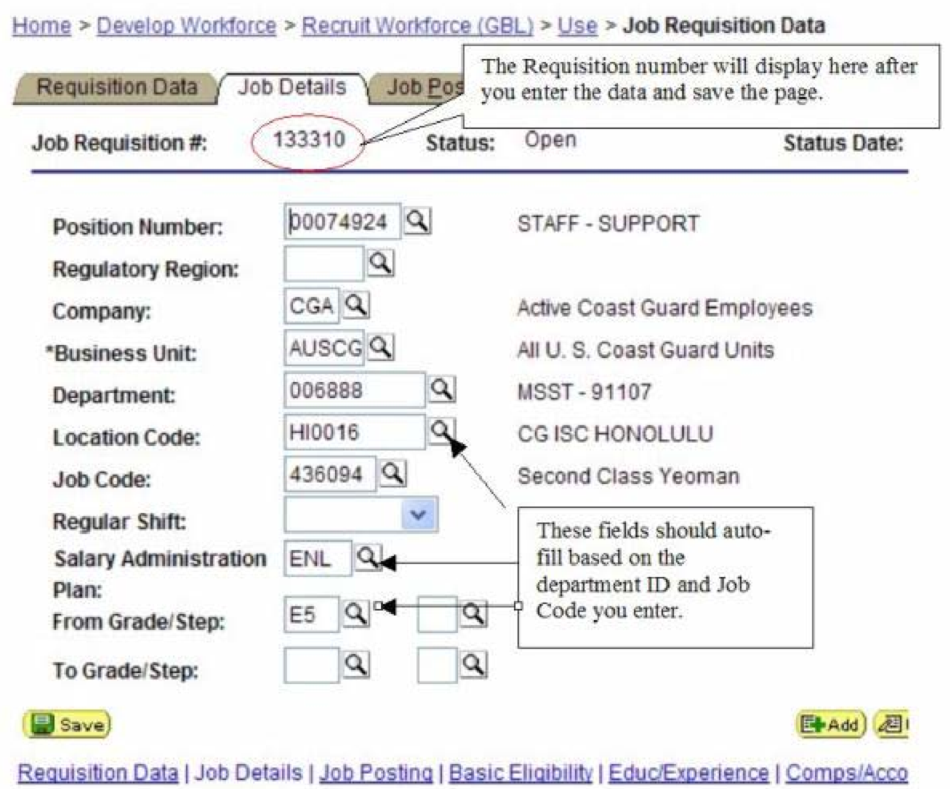
Creating a New Job Requisition, Continued

Procedure (continued)

Step	Action
6	Click the Save button. The screen will refresh and the **Job Requisition #** field (at the top of the page beneath the tab labels will be update to show the system generated number. 

Error on save?

If you receive an error (Example: "*Data Conflicts With Existing Data…*") when you save, but the Requisition number changes from all zeros, please contact PPC Customer Care. Provide them with the requisition number shown when you attempted to save and reference this guide (page 2-A-8).

The error occurs when an automated process creates an invalid job requisition and prevents DA from generating any new requisition numbers.

PPC Customer Care will create a trouble ticket, with the offending "bad" job requisition number, and route it to PPC (sdm) for database correction.

No new requisition numbers can be generated when this error condition exists.

Section B, Applicant ID Numbers

Chapter Overview

Introduction	This section provides the procedure for generating an applicant ID number.
Discussion	All accessions, including those for members who are changing components or receiving a commission, require a new applicant ID number.
Timing / Responsibility	This is the second step in any Direct Access accession. Normally, the first step is creating a job requisition number. See section 2-A of this guide for more information. Applicant IDs will be generated by Coast Guard Recruiting Command (CGRC) for civilian and other military service officer candidates and for those selected for a direct commission program. IDs generated by CGRC only include minimal information in the Applicant Data section. For example, the Job Requisition number may not be available at the time the number is generated. Therefore the SPO completing the accession must review the applicant data pages for all accessions and enter any missing information. The SPO, responsible for entering the accession, will generate the applicant ID number for other accession types.
DA user roles for accessions	The CG Applicant Data (CGAPPL) user role is now required in order to generate an applicant ID and enter applicant data. The ability to perform these actions has been removed from the SPO Technician (CGHRS) and SPO Supervisor (CGHRSUP) user role permission lists.

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Chapter Overview, Continued

DA user roles for accessions (cont'd)

The following user roles are required for accession processing:

Role(s)	Responsibility/Access
CGHRS with the CGAPPL add on	1. Generates Applicant ID number and job requisition number, if necessary. 2. Enters/Verifies applicant data: • Identification data • Education and test results • Contract data (type of accession, pay grade/rate/rating, term, service dates, prior service dates, etc.)
CGHRSUP	Hires Applicant
CGHRS*	Completes post hire processing (e.g.): • Tax Withholding • Payment Option Election • Reserve Orders and/or Endorsements on orders • Pay Entitlements • SGLI/FSGLI Elections

**CGHRSUP or CGHRS w/ CGAPPL is not prohibited from completing post hire processing.*

Before you begin

The following is the minimum information is necessary to generate the applicant ID:

- Applicant's Full name
- Applicant's SSN
- Applicant's Date of Birth
- Applicant's Place of Birth
- Applicant's Gender
- Applicant's Contact information*
  - Home Address
  - Mailing Address
- Date the accession will be effective
- Job Requisition Number or the Position number (See Chap 2-A if you need to create or reopen a job requisition).

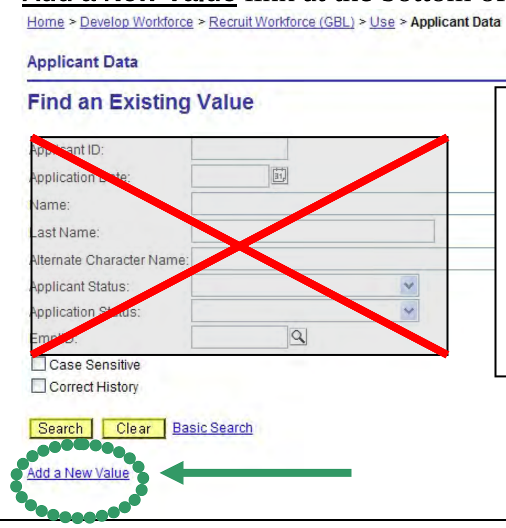
*You may also enter the applicant's email address and phone number when creating the applicant ID if you have them available, however, it they are not required in order to generate the ID.

In this section

The following topic is covered in this section.

Generating an Applicant ID Number

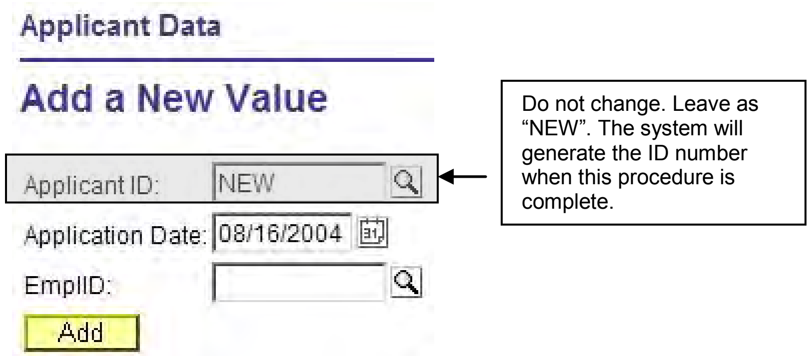
Procedure Follow these steps to generate an applicant ID number.

Step	Action
1	Select the following menu items: Develop Workforce> Recruit Workforce (GBL)> Use> Applicant Data
2	The Find an Existing Value page will display. Click the **Add a New Value** link at the bottom of the page.  When initially generating an Applicant ID do not enter any information on this page. This could cause you to bring up an existing ID from the member's previous enlistment/ CG affiliation. Each new accession must begin with a new applicant ID.

Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

Step	Action
3	The **Add a New Value** page will display. The Applicant ID field will default to "NEW" and the Application Date field will pre-fill with the current date. 
4	Complete the **Application Date** field. This date will actually convert to the accession date later on in the process. Click the Calendar icon next to the **Application Date** to select a Date or just type in a date. • **For Officer Accessions:** Enter the date the Oath of Office was administered. • **For Enlisted Accessions**: Enter the date of the enlistment contract DD-4-1.
5	Complete the **EmplID** (Employee ID Number) field. If you know the person you are generating the Applicant ID number for has an Employee ID number from previous Coast Guard, NOAA, Auxiliary or Civilian employee service, then enter the employee ID number in the EmplID field. If you do not know the number or you are not sure if the person has a previous affiliation, **you must search for an existing employee ID number**. Click the  icon next to the **EmplID** field.

Continued on next page

Generating an Applicant ID Number, Continued

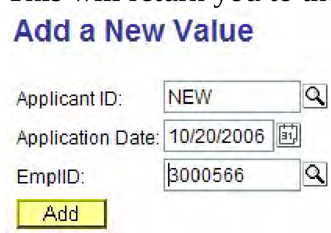
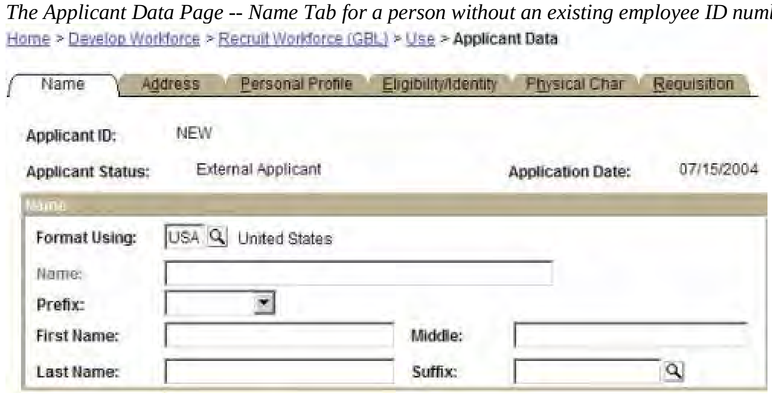
Procedure **(continued)**

Step	Action
5	The **Lookup EmplID** page will display:  Complete at least **one** of the three fields: EmplID: 1234567 Or, Name: Flintsone,Frederick A Or Last Name: FLINTSONE And click the Lookup button.
6	Review the search results. If any matches are found you will need to perform additional research to determine if the person you are generating the applicant ID for already has an employee ID. You can find out more about the people listed in the search results by clicking the **New Window** link, navigating to **Administer Workforce > Use > Personal Data** and entering the employee IDs you located in the previous step. Compare the SSNs or birth dates with those of your applicant to ensure the applicant doesn't already have an employee ID. Repeat step 5, using less restrictive search criteria if necessary, until you are sure the person doesn't have an employee ID already.

Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

Step	Action
7	If you do not locate a positive match, click the Cancel button. If you locate a positive match, select the employee ID from the search results on the Lookup Employee ID page. This will return you to the Add a New Value page. 
8	Click the **Add** button. The Applicant data page will display. *The Applicant Data Page -- Name Tab for a person without an existing employee ID number*  *The Applicant Data Paae -- Name Tab for a person with an existing employee ID number* 

Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>
Enter (or, in the case of an applicant with an existing EmplID, verify) member's First Name, Middle Name, and Last Name in the appropriate fields. Also, select and enter Suffix if applicable.

The Applicant Data Page -- Name Tab


NOTE Do not enter any spaces in any of the name fields. Any letters after blank spaces are not recognized when the name 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.

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

Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

Step	Action
10	Click the Address Tab. This is the member's **Home of Record Address**. Enter the address in the **Address 1** field. Enter the City, County and State in the appropriate fields. Click on the to view valid State Codes.

The Applicant Data Page -- Address Tab.

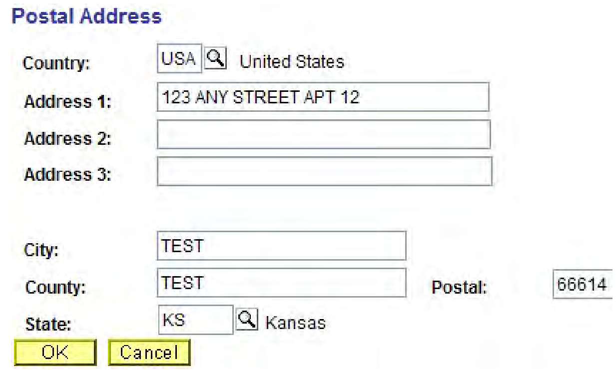
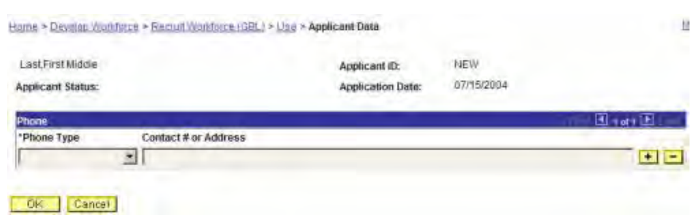
Step	Action
10	Click on the Mailing Address link. Enter the **current** mailing address:

Country	Enter "USA" for U. S. Addresses.
Address 1	The member's address (e.g. "123 Main Street, Apt 12" or "P.O.Box 12").
Address 2 Address 3	Not used, leave blank (data in these fields will not be passed to JUMPS, Segment 66, when updating the member's mailing address).
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

Generating an Applicant ID Number, Continued

Procedure **(continued)**

Step	Action
10	*Postal Address Page, accessed by clicking on the **Mailing Address** link on the Applicant Data Page -- Address Tab.* 
11	Click OK. The Postal (Mailing) Address Page will close and you will be returned to the Address Tab of the Applicant Data page.
12	Click the Email link. The Applicant E-Mail Address page will display.  Enter any available e-mail address information.
13	Click OK. The E-Mail Address Page will close and you will be returned to the Address Tab of the Applicant Data page.
14	Click the Phones link. The Applicant Phones page will display.  Enter any available phone number information.

Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

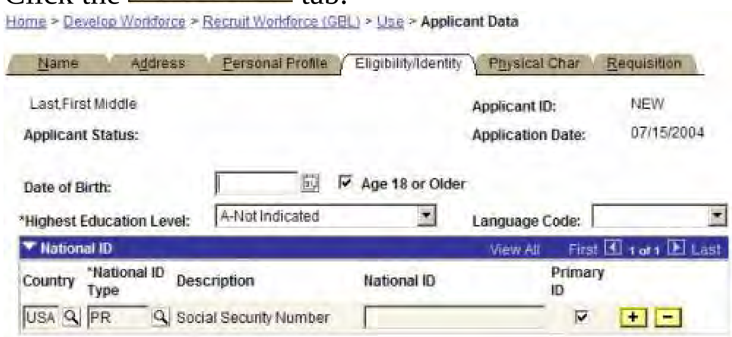
Step	Action
15	Click OK. The Applicant Phones page will close and you will be returned to the Address Tab of the Applicant Data page.
16	Click on the Personal Profile tab.  a. Click the **Gender** list box. Unknown. Select Male or Female. b. Select Marital Status list box *Marital Status: Single and select the correct status from the drop-down menu. c. *Source*, *Employee Referral ID* and *Specific Referral Source* are optional fields. They can be left blank. The information can be entered if it is available.

Continued on next page

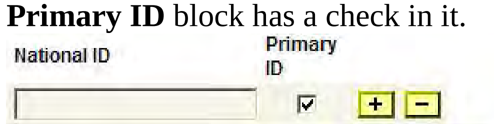
Generating an Applicant ID Number, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>17</td><td>
Click the Eligibility/Identity tab.



1. Enter the member's **Date of Birth** .
2. Put a Check in the block Age 18 or Older if the member is age 18 or older.
3. Enter the member's **Education Level at time of entry into the service..** A-Not Indicated . (Select from drop-down menu).
4. Select the **Language Code** from the drop-down menu. (Note: This is the member's primary language, not an indictor of any foreign language skills.)
5. In the **National ID** block enter the member's SSN. Ensure the **Primary ID** block has a check in it.

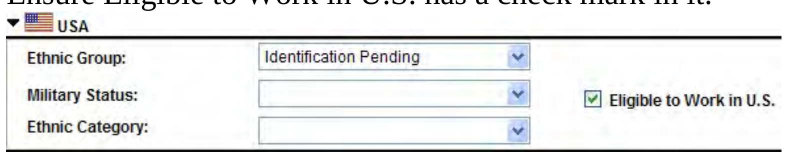


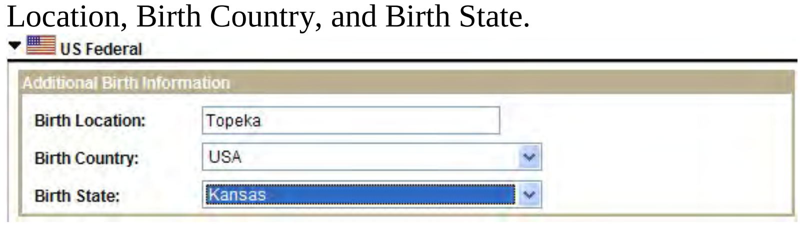
</td></tr>
</table>

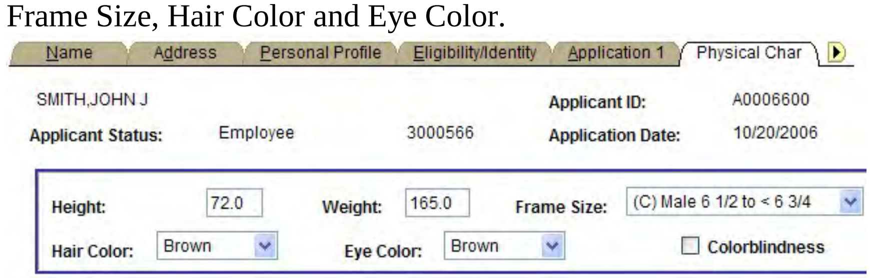
Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18</td><td>Click on the ▾ USA button.
Enter the member's
1. Ethnic Group,
2. Military Status, and
3. Ethnic Category.
Make selections from the drop-down menus.
Ensure Eligible to Work in U.S. has a check mark in it.


The codes are explained on the reverse side of the Ethnicity and Race Self-Reporting Worksheet, CG PPC-5200 (http://www.uscg.mil/ppc/forms/PPC5200.pdf).
If a completed worksheet isn’t available from the member, set the Ethnic Group to “Identification Pending” and continue.</td></tr>
<tr><td>19</td><td>Click on the ▾ US Federal button. Enter the member's Birth Location, Birth Country, and Birth State.


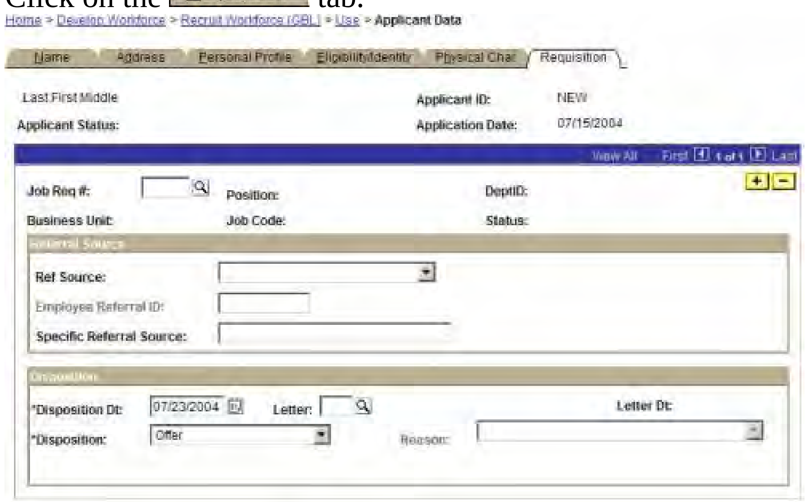
The Veterans Information and Other Information fields should be left blank or at their default values.</td></tr>
<tr><td>20</td><td>Click on the Physical Char tab. Enter the member's Height, Weight, Frame Size, Hair Color and Eye Color.

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

Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>21</td><td>
Click on the Requisition tab.



Enter the Job Req# - Examples: 132673 or 133156 for recruit training, 133044 for officer candidate (regular OCS), 135274 for reserve officer candidate **(ROCI)** or **DCO**, or click on the

Job Req #: Magnifying glass.

a. Enter the member's position number for their post-accession assignment (available from their orders).

b. Click Lookup. A Results screen will appear as below:

c. 

Once you click on the line item, the Job Req# will be auto-filled.

d. The Referral Source and Disposition sections of this tab should be left blank or at their default values.

Note: If a search for the Job Requisition number returns "No Matching Values Found", you will need to create or re-open a requisition number. The procedures can be found in the Create a Job Requisition (Section 2-A of this guide) topic.
</td></tr>
</table>

Continued on next page

Generating an Applicant ID Number, Continued

Procedure **(continued)**

Step	Action
22	Click the Save button. You have completed the Applicant Data Section of the Accession. The Applicant ID field will change from “NEW” to the next available system-generated number:  Make note of the system-generated number (enter it on the Checklist for Accessions, which can be found in enclosure (2) to this guide), you will need it to complete the remaining steps. Note: You may receive a warning message informing you that a member with the same name already exists in the system. You may dismiss the message, by clicking OK, if you are confident you are not entering a duplicate. If you're not sure, click the Cancel button (which will return you to the Applicant Data page), and use the New Window link to search the system and find the record with the same name. Then compare the records to ensure you are not adding the same member twice.

PPC SPO Manual

Part VIII, Accessions

Chapter 3, Hire Processing

Chapter Overview

Introduction

This chapter provides the procedures for entering an accession into Direct Access.

Before you begin

Please review Enclosure (3), Accession Tips, Problems and Error Messages, and Enclosure (4), Case Studies, before you attempt to process a unique accession. The procedures in this chapter are generic and do not provide the level of detail necessary for some accession scenarios. The following chapters contain additional information to be used in conjunction with this chapter to aid you successfully completing an accession or rehire:

Chapter 5, Direct Commission Officers
Chapter 6, OCS Accession/Graduation Processing
Chapter 7, Academy Graduation Processing
Chapter 8, Component Changes Section A, Discharge to Immediate Enlistment Section B, Regular to Reserve Officer Commission
Chapter 9, Resumption of Enlisted/CWO Status
Chapter 10, Selected Reserve (SELRES) Direct Commissions/Reserve Officer Candidate Indoctrination (ROCI)

In this chapter

The following topics are covered in the chapter.

Assistance

Anytime you encounter a problem, have an accession related question, or receive an error prior to hiring the member, contact Pam Flewelling, PPC (ADV- Personnel Data Integrity) at 785-339-3402 or send an e-mail to Pamela.R.Flewelling@uscg.mil. Pam will be happy to answer any questions or troubleshoot any error.

Continued on next page

Chapter Overview, Continued

What to do if an error is discovered after accession is completed

Once the SPO has reviewed and approved the Accession, it is imperative that ALL data be verified correct on the same day.

- If erroneous data is discovered, submit a PPC Customer Care Trouble Ticket immediately, annotating what data fields are incorrect and what the data fields should read. Once you have received the auto confirmation e-mail with your ticket number, call Customer Care so that immediate action can be taken.

- Reviewing the data and alerting PPC of errors on the same day is important because PPC can correct the accession prior to the data loading into JUMPS. If errors are discovered after the Accession has processed into JUMPS, corrections are much more difficult and will lead to several weeks of pay problems for the member.

Enter/Verify Applicant Data

Procedure Follow these steps to enter verify or enter Applicant Data

Step	Action
1	Proceed to the following path: Develop Workforce> Recruit Workforce (GBL)> Use> Applicant Data *The CGHRS Role User completes:* • Applicant Data • Identification Data • Education • Test Results • Applicant Contract Data The CGHRSUP Role User reviews the above items and then completes the Hire Applicant portion to finalize the Accession.
2	If the person already has an applicant ID (see note below), enter it in the Applicant ID field and click the search button. If you suspect the person has an applicant ID, but you do not know what it is, provide some search criteria (such as the last name) and click the search button. **Warning**: Do not enter an existing Employee ID in the Applicant ID field. This will cause the system to bring up the member's existing applicant and contract data, which will cause the ReHire transaction to fail. Follow the procedures in Chapter 2-B of this guide if the person does not already have an applicant ID.

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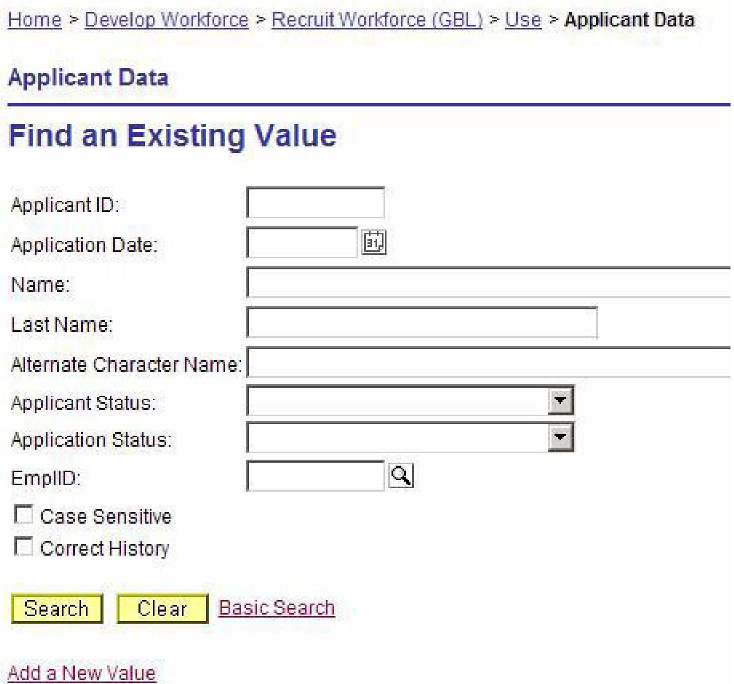
Enter/Verify Applicant Data, Continued

Procedure (cont'd)

Step	Action
2	 **Note**: For DCOs and Prior Service members the assignment officer will complete the Applicant ID portion of the accession process. This is done so the assignment officer may create PCS or EAD orders assigning the member to their PDS. • When the Applicant Data module is saved an Applicant ID number is created. When accessing a DCO or prior service member, if you do not know the member's Applicant ID, you must search for it using the member's name under Applicant Data. • If you approve an accession transaction, in the Hire module, using an Applicant ID other than the one the assignment officer created, you will not be able to access the PCS or EAD orders. This is because the PCS orders were issued under a different Applicant ID. In that case you must contact PPC (CCB) to get the Applicant ID changed to the one created by the assignment officer.

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

Step	Action
3	Enter member's **First Name**, **Middle Name**, and **Last Name** in the appropriate fields. *The Applicant Data Page -- Name Tab*  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.

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click the Address Tab. This is the member's Home of Record Address. Enter the address in the Address 1 field. Enter the City, County and State in the appropriate fields. Click on the to view valid State Codes.
The Applicant Data Page -- Address Tab.


</td></tr>
<tr><td>5</td><td>Click on the Mailing Address link.
Enter the current mailing address in the Address 1 field. Enter the City, County, and State in the appropriate fields. Click on the to view valid State Codes.

Postal Address Page, accessed by clicking on the Mailing Address link on the Applicant Data Page -- Address Tab.


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

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

Step	Action
6	Click OK. The Postal (Mailing) Address Page will close and you will be returned to the Address Tab of the Applicant Data page.
7	Click the Email link. The Applicant E-Mail Address page will display.  Enter any available e-mail address information, per the instructions in the Employee Marital Status, Address, Phone and E-Mail Change topic.
8	Click OK. The E-Mail Address Page will close and you will be returned to the Address Tab of the Applicant Data page.
9	Click the Phones link. The Applicant Phones page will display.  Enter any available phone number information, per the instructions in the Employee Marital Status, Address, Phone and E-Mail Change topic.
10	Click OK. The Applicant Phones page will close and you will be returned to the Address Tab of the Applicant Data page.

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>Click on the Personal Profile tab.

a. Click the Gender list box. Unknown. Select Male or Female.
b. Select Marital Status list box *Marital Status: Single and select the correct status from the drop-down menu.
c. Source, Employee Referral ID and Specific Referral Source are optional fields. They can be left blank. The information can be entered if it is available.</td></tr>
<tr><td>12</td><td>Click the Eligibility/Identity tab.


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

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

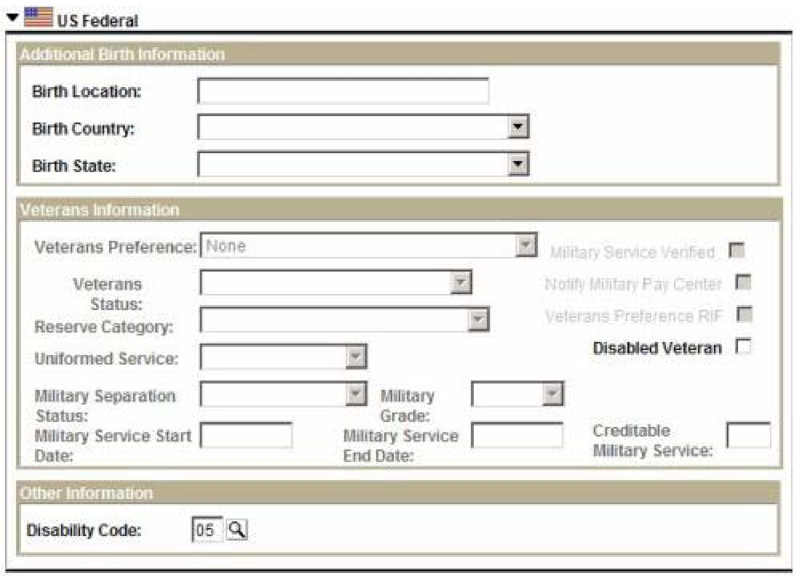
Step	Action
13	a. Enter the member's **Date of Birth** . b. Put a Check in the block Age 18 or Older if the member is age 18 or older. c. Enter the member's **Education Level at time of entry into the service.**. A-Not Indicated . (Select from drop-down menu). d. Select the **Language Code** from the drop-down menu. (Note: This is the member's primary language, not an indictor of any foreign language skills.) e. In the **National ID** block enter the member's SSN. Ensure the **Primary ID** block has a check in it.  f. Click on the USA button. Enter the member's **Ethnic Group, Military Status,** and **Ethnic Category**. Make a selection from the drop-down menus. Ensure **Eligible to Work in U.S.** has a check mark in it. 

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>Click on the ▸ US Federal button. Enter the member's Birth Location, Birth Country, and Birth State.



The Veterans Information and Other Information fields should be left blank or at their default values.</td></tr>
<tr><td>15</td><td>Click on the Physical Char tab. Enter the member's Height, Weight, Frame Size, Hair Color and Eye Color.

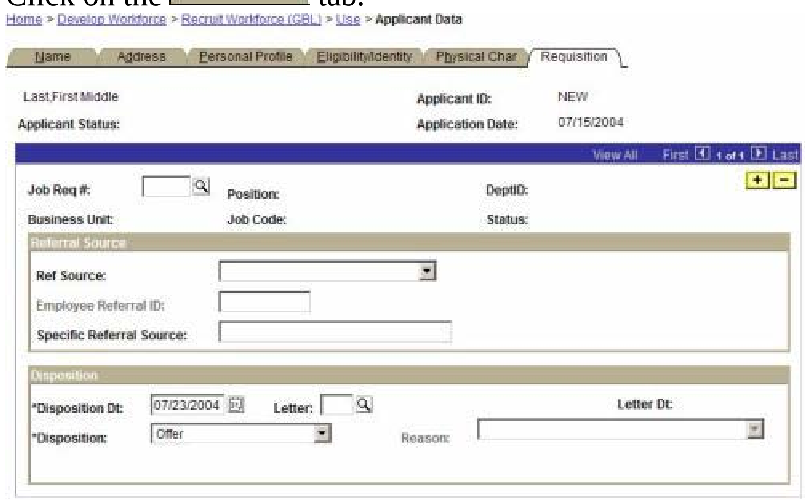
</td></tr>
</table>

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

Step	Action
15	Click on the Requisition tab.



a. Enter the Job Req# - Examples: 132673 or 133156 for recruit training, 133044 for officer candidate (regular OCS), 135274 for officer candidate **(ROCI)**, or click on the Job Req #: Magnifying glass.

b. Enter the member's position number

c. Click Lookup. A Results screen will appear as below:

d. 

Once you click on the line item, the Job Req# will be auto-filled.

e. The Referral Source and Disposition sections of this tab should be left blank or at their default values.

Continued on next page

Enter/Verify Applicant Data, Continued

Procedure (cont'd)

Step	Action
15	Note: If a search for the Job Requisition number returns "No Matching Values Found", you can create a requisition number. Procedures can be found in the Create a Job Requisition on page 2-A-5 of this guide. NOTE The Job Code field will default to the code associated with the position number the member is initially assigned to. For most Reserve accessions, the Job Code will be *4105096-Seaman*, as most Reservists are assigned to "*unbudgeted reserve positions*", which are all E3s. Be sure to change the default code, if necessary, on the Career Information tab of the Contract Data page. Accessions processed with the incorrect Job Code can only be corrected by PPC.
16	Click the Save button. You have completed the Applicant Data Section of the Accession. Note: You may receive a ***warning*** message informing you that a member with the same name already exists in the system. You may dismiss the message, by clicking OK, if you are confident you are not entering a duplicate. If you're not sure, click the Cancel button (which will return you to the Applicant Data page), and use the **New Window** link to search the system and find the record with the same name. Then compare the records to ensure you are not adding the same member twice.

Enter Applicant Identification Data

Introduction

This section provides procedures for using PeopleSoft to record an applicant's citizenship status.

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:

Develop Workforce > Recruit Workforce (GBL) > Use > **Identification Data**

1. Enter the applicant in Find an Existing Value page.
2. Click the search button to continue.

Data Entry

The Citizenship/Passport page will display.

- This page does not have an effective date; it is not necessary to insert a new row before entering the citizenship status.
- The Passport Information section of the page is not used in this procedure. However, you may enter the Passport data (number, dates, etc.) if available.

Continued on next page

Enter Applicant Identification Data, Continued

Procedure (cont'd)

<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><th>Status Description</th><th>Use When Member is a</th></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>Enter Official Passport Information if available:
<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</td></tr>
<tr><td>Expiration Date</td><td>Date the passport expires</td></tr>
<tr><td>County</td><td>County the passport is issued by (defaults to USA).</td></tr>
<tr><td>State</td><td>Enter DC (District of Columbia. All official and diplomatic passports are processed in the District of Columbia.</td></tr>
<tr><td>City</td><td>Enter Washington.</td></tr>
<tr><td>Authority</td><td>Enter MBR (member), DEP (dependent) or CIV (Civilian employees).</td></tr>
<tr><td>Comment</td><td>Comments. Only indicate dependent's name in the comment block.</td></tr>
</table></td></tr>
<tr><td>5</td><td>Click the Save button. The Applicant Identification Data entry is now complete.</td></tr>
</table>

Enter Education Data

Introduction

This section provides the procedures required for entering an applicant's degree information in the system. This includes the level of education, type of degree/major, average grade, date acquired and major code.

Reference

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

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

Process

Information about an applicant's education and degree(s) should be included in the package received from the recruiting office.

Procedure

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

Step	Action
1. Menu sequence	Select menu items in the following order. Home > Develop Workforce > Recruit Workforce (GBL) > Use > **Education**
2. Locate Member	Enter the Applicant ID

Continued on next page

Enter Education Data, Continued

Procedure (cont'd)

Step	Action
3. Enter, update, or view the appropriate fields	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. Data Entry	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 is 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).

Continued on next page

Enter Education Data, Continued

Procedure (cont'd) (continued)

Step	**Action**
Field	**Description/Instructions**
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 applicable
School	Not applicable
Educator	Not applicable
State	Not applicable
Minority Institution	Not applicable
5. Save	Click Save at the bottom of the page 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 applicant ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.

Enter Test Results

Introduction

This section provides procedures for entering an applicant's AFQT and ASVAB scores in the system.

Reference

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

- Personnel and Pay Procedures Manual (Chap 4), PPCINST M1000.2(series)
- Training and Education Manual (Chap 4), 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.

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 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.

Continued on next page

Enter Test Results, Continued

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

Step	Action
1. Menu sequence	Select menu items in the following order. Home > Develop Workforce > Recruit Workforce> Use > **Test Results**
2. Locate Member	Enter the Applicant ID and press the  button.
3. Enter, update, or view the appropriate fields	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. 
4. Data Entry	If a blank row is not displayed, click  to insert an additional row of test result information. **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. **<u>Do not enter Coast Guard Institute correspondence courses here</u>**. Correspondence course completion data is loaded into the system automatically. Manually entering correspondence course completions will result in duplicate entries.

Continued on next page

Enter Test Results, Continued

Procedure (cont'd)

Step	Action
Field	**Description/Instructions**
***Test** (completion of this field is required)	1. Click on the icon of the blank row to display the Lookup search page. 2. Click **Lookup** to display test names. 3. 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.
Test Date (completion of this field is required)	Enter the Date the Test or retest was taken. Click the icon to open a calendar and choose the date. The Test Date is a required field. 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. • 07/01/2004 will be listed if the score was updated per ALCOAST 318/04; ASVAB Renorming
Score (completion of this field is required)	Enter the score of the Test that was taken.
Passed	Click this checkbox to indicate "Passed".

Continued on next page

Enter Test Results, Continued

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

Step	Action
Note (completion of this field is required when entering ASVAB test scores)	Enter the version of the test that was taken In the **Note** field (e. g. "17A").
5. Save	Click the Save button to save you 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 applicant ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.

Test Results — View All — First 1-8 of 10 Last

*Test	Descr	Test Date	Score	Passed	Note
AFQT	Armed Forces Qual Test	07/01/2004	41.00	☑	17B
ASVAB_AR	Arithmetic Reasoning	12/18/2002	50.00	☑	17A
ASVAB_AS	Auto & Shop Information	07/01/2004	60.00	☑	17B
ASVAB_EI	Electronics Information	07/01/2004	59.00	☑	17B
ASVAB_GS	General Science	12/18/2002	47.00	☑	17A
ASVAB_MC	Mechanical Comprehension	07/01/2004	66.00	☑	17B
ASVAB_MK	Mathematics Knowledge	07/01/2004	46.00	☑	17B
ASVAB_PC	Paragraph Comprehension	12/18/2002	56.00	☑	17A

Enter Applicant Contract Data

Introduction

This section provides the procedure for entering Applicant Contract Data. The source of information for this page will be an enlisted member's Enlistment Contract (DD/4-1) or an officer's Oath of Office (CG-9556). You will also need any DD-214's issued for members with prior service.

Submit a Request for Statement of Creditable Service for All Personnel Claiming Prior Service

A Statement of Creditable Service (SOCS) request must be sent to PPC (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 as part of the accession process. Page 5-C-5 of the Personnel and Pay Procedures Manual, PPCINST M1000.2a provides the procedure and lists other times when a SOCS request must be submitted. Also see http://www.uscg.mil/ppc/ses/socs.asp for more information on submitting a SOCS/SOCSS request.

Delayed Enlistment Program

Per section 2.B.4, Coast Guard Pay Manual, COMDTINST M7220.29(series), service in the Delayed Enlistment Program (DEP) is not creditable for pay purposes unless the member performs active duty or inactive duty for training prior to attending training. Therefore, when completing service date entries for a member with DEP time, only the **Military Entry Date** and **Date Completed Military Obligation** (normally 8-years after the Military Entry Date) need to be adjusted to reflect the date the member entered into a DEP contact. The Pay Base Date, Active Duty Base Date, Effective Date for Pay & Allowances, etc. should all be completed with the date the member began the current active duty period (e.g. Date member began travel to report for basic training).

Continued on next page

Enter Applicant Contract Data, Continued

Rehires

If you are completing this page in connection with a Rehire of a Former Member you can obtain much of the information necessary to complete Steps 4 (the Service Information tab) and 5 (the Prior Service tab) from the member's current record. Go to:

Administer Workforce > Administer Workforce (GBL) > Use > **Contract Data**

Enter the Employee ID and click the search button. Click the **Service Dates** tab and the '**Prior Svc Info**' button. Also see Chapters 5 – 10 of this part for specific guidance on unique accessions programs (OCS, DCOs, Regular to Reserve, etc.).

Printing Contracts

You cannot print a contract for an accession. It is assumed that the new member would be arriving from the recruiting office/MEPS with a contract already signed. There is no need to print the contract from the system. However, in the case of a rehire, you may need to produce a contract for the member and enlisting officer to sign. For this reason a PDF (Adobe Acrobat/Forms) version of the form is available - DD-4 (http://www.dtic.mil/whs/directives/infomgt/forms/eforms/dd0004.pdf).

Procedure

Follow these steps to enter Applicant Contract Data:

Step	Action
1	From the Applicant Data page, click on the **Use** link at the top of the screen. At the menu screen select **Applicant Contract Data** or, from the home menu, select: Develop Workforce > Recruit Workforce (GBL) > Use > **Applicant Contract Data** Enter the Applicant ID and click the search button.
2	The Applicant Contract Data page will open. The first tab, **Contract Status/Content** should be displayed (click on the tab to open it if necessary). For most initial enlistments/officer accessions you will only need to set the **Contact Number** (**0001** for first accession) and **Contract Begin Date** field. The Contact Begin Date defaults to the current date. Change it to the date the member enlisted or signed the acceptance of the oath office.

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>


Complete the fields as described below:

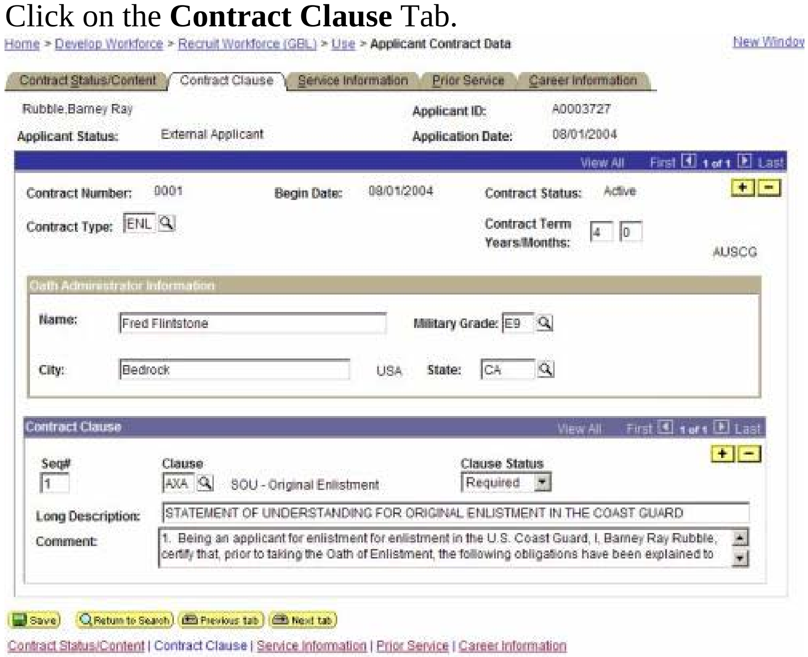
<table>
<tr><th>Field</th><th>Description/Entry</th></tr>
<tr><td>Contract Number</td><td>"0001" indicating first contract with the Coast Guard or Coast Guard Reserve. You must change the number if this is a rehire (View member’s previous contract history in Admin Workforce > Use > Contract Data to determine next number)</td></tr>
<tr><td>Contract Begin Date</td><td>Enter the date of enlistment or date the oath of office is effective (commissioning date). (Note this field will default to the current date, you will need to change it).

Note: If the member has no prior service (including time in the Delayed Enlistment Program, which is not creditable service), the Pay Entry Base Date must be equal to the Contract Begin Date, Active Duty Base Date and Effective Date Pay Allowance. For an OCS accession, these dates should be set to the date the candidate, w/no prior service, enlisted.</td></tr>
<tr><td>Contract End Date</td><td>Leave blank (the expiration of enlistment/obligated service is entered on the Service Information tab)</td></tr>
<tr><td>Contract Status</td><td>Should be set to "Active" by default, change it to "Active" if it is not.</td></tr>
<tr><td>Contract Expected End Date</td><td>Leave blank (system will fill in after you complete the Service Information tab and save the contract data)</td></tr>
<tr><td>Regulatory Region</td><td>Should be set to "USA" by default, change it to "USA" if it is not.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

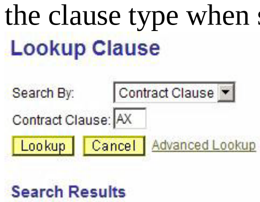
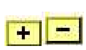
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>(Continued)
<table>
<tr><th>Field</th><th>Description/Entry</th></tr>
<tr><td>Contact Template ID</td><td>Not used. Leave blank.</td></tr>
<tr><td>Addition Contract Checkbox</td><td>Not used. Leave blank.</td></tr>
<tr><td>More than one year Expected Checkbox</td><td>Not used. Leave blank.</td></tr>
<tr><td>Comment</td><td>Not used. Leave blank.</td></tr>
<tr><td>Contract Content</td><td>Not used. Leave blank.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>Click on the Contract Clause Tab.


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

Continued on next page

Enter Applicant Contract Data, Continued

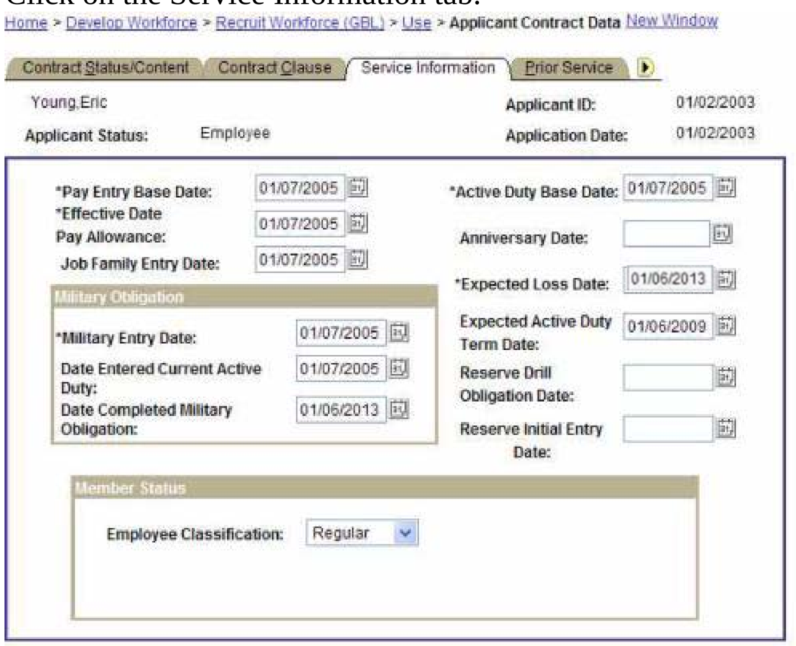
Procedure (continued)

Step	Action	
3	Complete the following fields:	
	Contract Type	Based on the Job Requisition number used in the applicant data section this will default to "**ENL**" for an enlistment or "**COM**" for an officer accession. Click the icon to lookup valid codes if necessary. Prompt Button will display a list of valid values.
	Contract Term Years/ Months	Enter the number of years of the Contract (Months are not used). For initial accessions into the Coast Guard Reserve, including OCS candidates with no prior service the term is 8 years and 0 months. DCO - 30 year's commissioned service or 1st day of the month following member's 60th birthday whichever is first.
	Oath Administrator Information	Enter the Oath Administrators Name and Grade, and the City and State the Oath was given.
	Seq #	Pre-filled. Specifies the order in which contract clauses will be listed. 1 will be the first, 2 will be second, etc.
	Clause	Click the icon to lookup valid codes if necessary. Use "**AX**" for the clause type when searching.  Select the applicable Statement of Understanding agreement from the search results
	Clause Status	If Clause field is used click drop-down and enter Required.
	Long Description	If Clause field is used this is pre-filled.
		Use the Add/Remove buttons to add or remove contract clauses as necessary.

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

Step	Action
4	Click on the Service Information tab.  Complete the fields as described below: **Pay Entry Base Date**: If the member has no prior service, enter date of enlistment/appointment. If the member has prior service, the Pay Entry Base Date will need to be constructed if there was a break in service. See Appendix (C) of the Personnel and Pay Procedures Manual. **Note**: If the member has no prior service (including time in the Delayed Enlistment Program, which is not creditable service), the Pay Entry Base Date must be equal to the Contract Begin Date, Active Duty Base Date and Effective Date Pay Allowance. For an OCS accession, these dates should be set to the date the candidate, w/no prior service, enlisted.

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
<table>
<tr><td>Effective Date for Pay Allowance</td><td>If the member has no prior service or a break in service, enter date of enlistment/appointment (Contract Begin Date).

If the member is currently on active duty, this is the date the member entered the current active duty period without a break (carry date over from previous contract).

Note: If the member has no prior service (including time in the Delayed Enlistment Program, which is not creditable service), the Effective Date for Pay Allowance must be equal to the Contact Begin Date, Pay Entry Base Date and Active Duty Base Date.</td></tr>
<tr><td>Job Family Entry Date</td><td>The Job Family Entry Date field is used to record the member's effective date of rating. Normally, this will be the same as the date of accession if the member has no prior Coast Guard service or in the case of a reserve delayed enlistment the date of first day of active duty.

The Job Family Entry Date field is used to record the member's effective date of rating (e. g. Date member first became a BM, GM, MK, etc.). For member's with no prior USCG or USCGR service, this will be the same date as their date of accession.

If the member has prior USCG or USCGR service you must change the Job Family Entry Date to the date the member first began serving in the rating in which presently serving. This can be determined by accessing the member's contract data (Administer Workforce > Administer Workforce (GBL) > Use > Contract Data). The Job Family Entry Date is shown on the Service Dates tab.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
<table>
<tr><td>Active Duty Base Date</td><td>If the member has no prior service, enter date of enlistment/appointment. If the member has prior service, or had a break in service, see Appendix (C) of the Personnel and Pay Procedures Manual (3PM) for computation rules.

Note: If the member has no prior service (including time in the Delayed Enlistment Program, which is not creditable service), the Active Duty Base Date must be equal to the Contract Begin Date, Pay Entry Base Date, and Effective Date for Pay Allowance. The ADBD must be filled in on all accessions but is not applicable to reserve personnel.</td></tr>
<tr><td>Expected Loss Date</td><td>The Expected Loss Date is the date the member will have no further reserve and/or active duty obligation.
• For regular and reserve enlisted members this date will be the same as “Date Completed Military Obligation” or the contract end date, whichever is greater.
❖ Example 1: Enlistment in the CG Reserve on 1 April 2009 with no prior service (8-year initial service obligation).
<table>
<tr><td>Date Completed Military Obligation</td><td>31 March 2017</td></tr>
<tr><td>Expiration of Enlistment/
Contract End Date</td><td>31 March 2017</td></tr>
<tr><td>Expected Loss Date</td><td>31 March 2017</td></tr>
</table>
❖ Example 2: Four year enlistment in the CG (Active Duty) on 1 April 2009 with 6 years prior service (no break in service, 2-years remaining initial service obligation)
<table>
<tr><td>Date Completed Military Obligation</td><td>31 March 2011</td></tr>
<tr><td>Expiration of Enlistment/
Expected Active Duty Termination Date/
Contract End Date</td><td>31 March 2013</td></tr>
<tr><td>Expected Loss Date</td><td>31 March 2013</td></tr>
</table>
• For regular Coast Guard officers this will be equal to the Expected Active Duty Term Date.
• For NOAA officers this will be the day before officer’s 60th birthday.
• For reserve officers use the same date as Expected End Date of Contract (See Contract Term pg. 25).</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
<table>
<tr><td>Expected Active Duty Term Date</td><td>Enter the Expected Active Duty Termination Date on the member.
Regular Enlisted -- The member's expected release date from active duty.
Reserve Enlisted -- Blank
Regular Officer -- The 30 year commission service date (including all commissioned time in an uniformed service)
Reserve Officer – Blank</td></tr>
<tr><td>Military Entry Date</td><td>If the member has no prior service, enter date of enlistment/appointment or date of entry into the Delayed Enlistment Program (DEP).

If the member has prior service, this is the date of the member’s initial entry into the Armed Forces. Includes both active and inactive service, as well as time spent at military academy, OCS, or Delayed Enlistment.</td></tr>
<tr><td>Date Entered Current Active Duty</td><td>Enter the Date of This Enlistment (or Date of Oath) or date of first day of active duty (whichever is later).</td></tr>
<tr><td>Date Completed Military Obligation</td><td>Determine and enter the date the member’s military obligation will be completed. If the military obligation of the member has expired, enter the date it expired.
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:
By being discharged from a service component (the discharge date would be the Date Completed Military Obligation even if less than 8 years from entry date)
By serving any combination of active and/or reserve service in any Armed Forces service or reserve component thereof.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

Step	Action	
4	**Anniversary Date**	If the member is a Reservist, enter the Anniversary Date. Do not complete this field if the member is accessing into the USCG. • 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, enter 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 hours that the member was in civilian status, on the inactive status list, or in the Retired Reserve.) 2. If there is a break in service, enter the date the member is re-entering in the Reserve component.
	Reserve Drill Obligation Date	The date the member of the Reserve no longer is required to perform inactive duty drills. Do not complete this field if the member is accessing into the USCG. This will normally be specified on the Statement of Understanding for the Reserve Enlistment (For SELRES Direct Commission Candidates use the date 3 years from the projected ROCI class graduation date).
	Initial Reserve Entry Date	Date of initial entry into any reserve forces. Do not complete this field in the member is accessing into the USCG.

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

Step	Action
4	**Employee Classification**: Enter the Members Status. Select from the Drop-down listing.

Note: If you select a reserve classification you must also provide the Training/Pay Code and Classification code. Click the lookup icon and select the applicable codes from the lists.

Regular=Active Duty (not a reservist on EAD or an officer with a reserve commission on EAD)
SELRES = Reservists assigned to a unit for IDT
IRR = Reservist not assigned to a unit for IDT and reservist who will be performing EAD (DCOs & OCS w/no prior service; IRR/P)
NOAA = NOAA Officer Corps

Reserve Training/Pay Codes

If Empl_Class is	The Reserve Training Pay Code can be:
Active Duty (Regular USCG)	Blank
Selected Reserve (SELRES) (including members being ordered to long-term active duty and Direct Commission Officers on EAD)	**A = Drilling Pay Status** ~~B = IMA w/ Selected Service~~ ~~C = RK in Interphase (btwn trng)~~ ~~D = Reserve Flag Officers~~ ~~F = RP, RK & RL on IADT (and reserve members while at OCS)~~ (Do not use, set by orders only)
Inactive Ready Reserve (IRR) IRR members who regularly drill for no pay Assigned to drilling Dept	H = No drill requirement E = Drill Requirement w/o IDT unit P = Awaiting IADT J = RSV Enl wait/attend OCS/ROCI
Active Standby Reserve (ASL)	G = Key Federal Employee N = All Other Active Standby
Inactive Standby Reserve (ISL)	I= Inactive Standby Reserve
Inactive Ready Reserve (IRR-ASP) Non-participating IRR members	H = No drill requirement
Reserve Retired Waiting Age 60 (RET-2)	Z = RET-2 (not a real Tra-Pay-Cd, but used for technical purposes)
Reserve Retired (RET-1)	Blank

For **OCS & ROCI candidates**, with no prior service who enlist before departing home en route to the Academy use the “IRR” employee classification with the “P” Training/ Pay Code. Submit a Reserve Member Status Change transaction on the day the member begins IADT to change the classification to “SELRES” and the Tra/Pay Cat to “A” (Drilling Pay Status).

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Reserve Classification Code
<table>
<tr><th>Reserve Classification</th><th>Classification Code</th></tr>
<tr><td>Enl non-prior svc REBI/A Sch</td><td>A</td></tr>
<tr><td>Inact Du Officer w/in 8 yr obl</td><td>I</td></tr>
<tr><td>Prior Svc CG Enl w/in 8 yr obl</td><td>J</td></tr>
<tr><td>Enl Stdnt w/split IADT</td><td>K</td></tr>
<tr><td>Enl P/K failed to compl IADT</td><td>L</td></tr>
<tr><td>Stdnt Maritime Acd Res Trng Pr</td><td>M</td></tr>
<tr><td>w/Svc Oblig not in another Cla</td><td>N</td></tr>
<tr><td>Enl Rqrd Attnd Rcrt Trng A Sch</td><td>P</td></tr>
<tr><td>Mbr w/o a Statutory Obligation</td><td>Q</td></tr>
<tr><td>Enl Mbr Cmplts 4 mos IADT</td><td>S</td></tr>
<tr><td>Enl non-prior svc direct PO</td><td>X</td></tr>
<tr><td>Enl Attds Rcrt Trng/30 dy OJT</td><td>Y</td></tr>
</table></td></tr>
<tr><td>5</td><td>Click on the Prior Service tab at the top of the screen.

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

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Complete the fields as described below.

Note: All fields on this tab may be left blank if the member has no prior military service.
<table>
<tr><td>Military Branch</td><td>Enter prior Service Branch of applicant. Click the Search icon to lookup valid codes if necessary. Click Look Up to display a list of valid values.</td></tr>
<tr><td>Military Grade</td><td>Enter prior Service grade of applicant. Click the Search icon to lookup valid codes if necessary. Click Look Up to display a list of valid values.</td></tr>
<tr><td>Military Service Start Date</td><td>Enter prior Service start date.</td></tr>
<tr><td>Military Service Stop Date</td><td>Enter prior Service stop date.</td></tr>
<tr><td>Prior Service Days Leave Sold</td><td>Enter the TOTAL number of leave days sold for all periods of service in the military.</td></tr>
<tr><td>DD214 Verified Flag</td><td>Click Check Box if DD214 verified prior service. .
Note: Enter all periods of prior service by selecting the plus sign (+) and entering a new row for each period of prior service.</td></tr>
</table></td></tr>
</table>

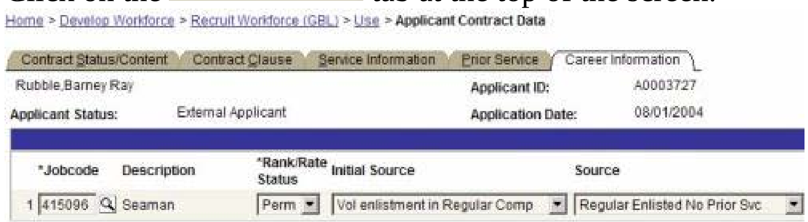
Continued on next page

Reminder! A Statement of Creditable Service (SOCS) request must be sent to PPC (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 as part of the accession process.

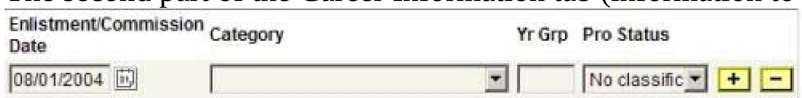
Enter Applicant Contract Data, Continued

Procedure (continued)

Step	Action
6	Click on the Career Information tab at the top of the screen.



The second part of the Career Information tab (information to the right)



Jobcode	Enter the code for the member's rank/rating. Click the Search icon to lookup valid codes if necessary. Click Look Up to display a list of valid values. NOTE This field will default to the code associated with the position number the member is initially assigned to. For most Reserve accessions, the Jobcode will be *4105096-Seaman*, as most Reservists are assigned to "*unbudgeted reserve positions*", which are all E3s. Be sure to change the default code, if necessary, before saving the Contract Data page. Accessions processed with the incorrect Jobcode can only be corrected by PPC. Job Codes listing (as of 8/29/06) http://www.uscg.mil/ppc/ps/global_workforce_inquiry_solution/job_codes.htm

Continued on next page

Enter Applicant Contract Data, Continued

Procedure (continued)

Step	Action	
6	**Rate/Rank Status**	Click the Drop Down Button icon to lookup valid codes if necessary Perm (for Permanent) should be selected it most cases, Direct Commission Officers (DCO) may differ
	Initial Source	Enter appropriate Initial Source. Click the Drop Down Button icon to lookup valid codes if necessary
	Source	Enter the applicants appropriate Source. Click the Drop Down Button icon to lookup valid codes if necessary.
	Enlistment/Commission Date	Enter the date the member enlisted or accepted the oath of office. In the case of delayed enlistments in the reserve (to await IADT orders to OCS), use the same date as you used for the Job Family Entry Date on the service info tab.
	Category	**Officers only.** Enter appropriate category for Applicant. Click the Drop Down Button icon to lookup valid codes if necessary
	Yr Grp	**Officers only.** Enter the Officer's year group.
	Pro Status	Not used for applicant.
7	Click  to save the contract.	

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Hire Applicant

Introduction

This section provides the procedure for completing the Hire Applicant portion of an accession. This page must be completed for both 'New Hires' and 'Rehires'.

Before You Begin

Before you complete the hire applicant process you should review the Applicant Data and Applicant Contract Data pages to ensure all information was entered correctly. Only EmplID, in the Job Information page, Effective date on the Personal data page, Action / Reason and Department Entry Date on the "Job Data" page, Department ID on the “Work Location” page, Salary Administration, Grade and Grade Entry Date” on the “Salary Plan” page and “Effective Date and Benefit Program” on the “Benefit Program Participation” page can be changed in “HIRE”. No other changes can be made in “HIRE”. You must return to “Applicant” to make any other corrections.

Also, be aware there are additional steps required to complete an accession when a member enlists but does not report for duty on the same day as enlistment. In these cases you must change the effective date on the Personal Data page (see step 4 below). Change the Department Entry Date on the Work Location tab (see step 5 below) and account for the travel time on the reporting endorsement on orders transaction. This does not apply to OCS candidates, DCOs, SELRES ROCI Candidates and delayed entry program recruits, who are accessed in a Reserve Inactive Status to await the start date of their training.

If the member is a reservist on Initial Active Duty for Training (IADT), you must create IADT orders.

*****VERY IMPORTANT*****

Once the SPO has reviewed and approved the Accession, it is imperative that ALL data be verified correct on the same day.

- If erroneous data is discovered, submit a PPC Customer Care Trouble Ticket immediately, annotating what data fields are incorrect and what the data fields should read. Once you have received the auto confirmation e-mail with your ticket number, call Customer Care so that immediate action can be taken.

Reviewing the data and alerting PPC of errors on the same day is important because PPC can correct the accession prior to the data loading into JUMPS. If errors are discovered after the Accession has processed into JUMPS, corrections are much more difficult and will lead to several weeks of pay problems for the member.

Continued on next page

Hire Applicant, Continued

Reminder

If this member is changing components (e. g. Reservist who is enlisting in the regular Coast Guard), did you remember to approve and save the discharge transaction before you began the Hire Applicant process?

Procedure

Follow these steps to complete the hire process.

Step	Action
1	Select menu items in the following order: Home> Develop Workforce.>Recruit Workforce (GBL)> Use> **Hire Applicant**
2	The **Add a New Value** window displays.  Enter the Applicant ID number and click the **Add** button. **Note**: If you receive an "Invalid ID/No Matching Values found" error message, go back through the applicant data sections and ensure all the steps were completed. If you are not able to save the Applicant Contract data, clear all the fields on the Career Information tab with the exception of the Job Code.
3	The Hire Applicant page displays: 

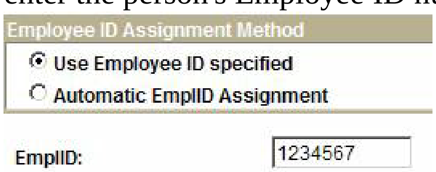
Continued on next page

Hire Applicant, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Ensure the "Automatic Emplid Assignment" radio button is marked if the applicant has no prior Coast Guard service (active, reserve, civilian or auxiliary). The default setting for this field is "Use Employee ID specified", you will need to change it to "Automatic Emplid Assignment" if the applicant has no prior Coast Guard service (active, reserve, civilian or auxiliary).

If the applicant has prior Coast Guard service (active, reserve, civilian or auxiliary), you would leave the "Use Employee ID specified" radio button marked and enter the employee ID number in the Emplid field.

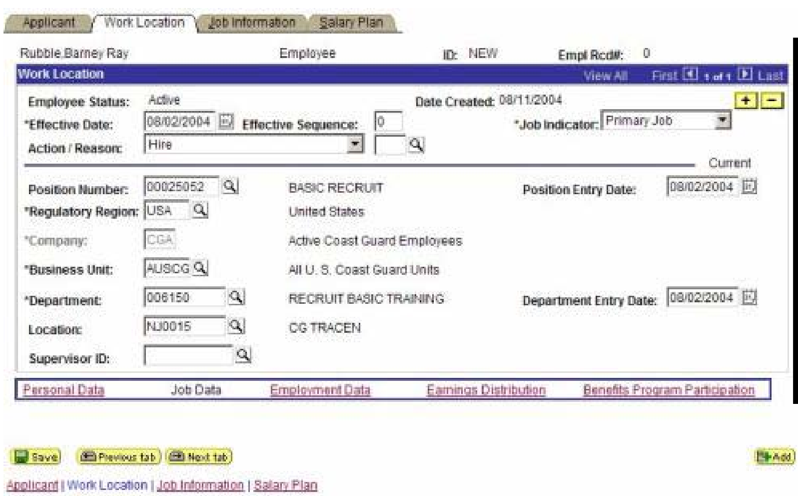
Warning: If the person you are accessing has ever been a member of the Coast Guard, Coast Guard Reserve, Coast Guard Auxiliary, NOAA Commissioned Officer Corps, or a civilian employee of the U. S. Coast Guard, they already have an Employee ID number. Mark the 'Use Employee ID specified' radio button and enter the person's Employee ID number in the EmplID field.

</td></tr>
<tr><td>4</td><td>Click on the Personal Data link at the bottom of the page.

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

Continued on next page

Hire Applicant, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Personal Data component will display.
A. Locate the Effective Date field on the Name tab. You must change this date to the date the member enlisted or signed the oath of office. It will default to the current date or the application date. Additionally, if the date the member reported for duty is not the same as the enlistment/accession date, and this is not a reserve accession (which includes OCS, and ROCI candidates), you must change the Department Entry Date (see next step below) and account for the delay in reporting in the endorsement on orders section. See the instructions at the end of this procedure for more information.
B. Review the data on each of the five tabs (Name, Address, Personal Profile, Eligibility/Identity and Physical Char.). Keep in mind that no changes can be made (other than the effective date on the name tab). If an error is discovered you must exit the Hire Applicant section (without saving) and return to <u>Applicant Data</u> to make any corrections.</td></tr>
<tr><td>5</td><td>After you have reviewed and verified Personal Data, click on the <u>Job Data</u> link at the bottom of the page.


See Enclosure (3), Accession Tips, Problems and Error Messages if member will be TEMDU En route to first their first PDS. You'll need to change the Department ID on the Work Location tab to facilitate the temporary duty en route.</td></tr>
</table>

Continued on next page

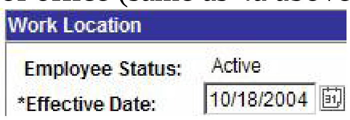
Hire Applicant, Continued

Procedure (continued)

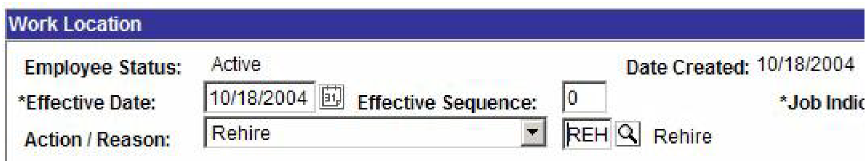
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

The **Job Data** component will display

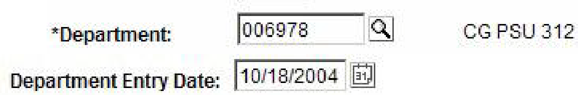
A. The Effective Date will match the date the member enlisted or signed the oath of office (same as 4a above):



B. If this is a new hire (The Automatic Employee ID Assignment radio button was checked in Step 1), the "Action/Reason fields will default to "Hire" for the action and blank for the reason.
If this is a Rehire (The Use Employee ID specified radio button was checked in Step 1), The Action/Reason fields will default to "Rehire" and "REH" in the reason field as shown below:

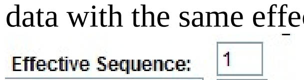


C. The Department Entry Date will default to the date of enlistment. **If there's a delay in reporting and this is a regular accession (not a reserve accession) change this date to the date the member reported for duty**. Failure to correct this date will cause the Endorsement on Orders transaction to be created with the wrong effective date.



Note: If you are completing an accession of a Reserve member, into an inactive status, there is no delay in reporting. The member is accessed directly into the Coast Guard Reserve and assigned to a department on the date of accession. Any travel time or other delay in reporting for active duty will be recorded on the Reserve IADT or EAD orders.

D. If this is a rehire immediately following a discharge (e. g. Member discharged from Reserve and Enlists in Regular CG next day), change the **Effective Sequence** number field to 1. The discharge transaction will place a row in job data with the same effective date.



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

Continued on next page

Hire Applicant, Continued

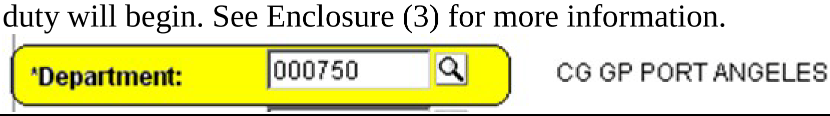
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>


Changing the Effective Sequence number will allow you to save the rehire without this error:

If you continue to receive this error, even after changing the Effective Sequence number, view the member's job data (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) (ensure the "Include History" checkbox is marked) and check the Effective Sequence number on the most recent entry. If there's already a row using number #1, then change the row in this step to #2. If there's already a #2, use #3, etc.

If you are hiring the member to a location other than the unit that's specified on the accession authorization (PCS Orders on the Airport Terminal), (e.g. "TEMDU En route") change the department ID to that of the unit where the member's active duty will begin. See Enclosure (3) for more information.



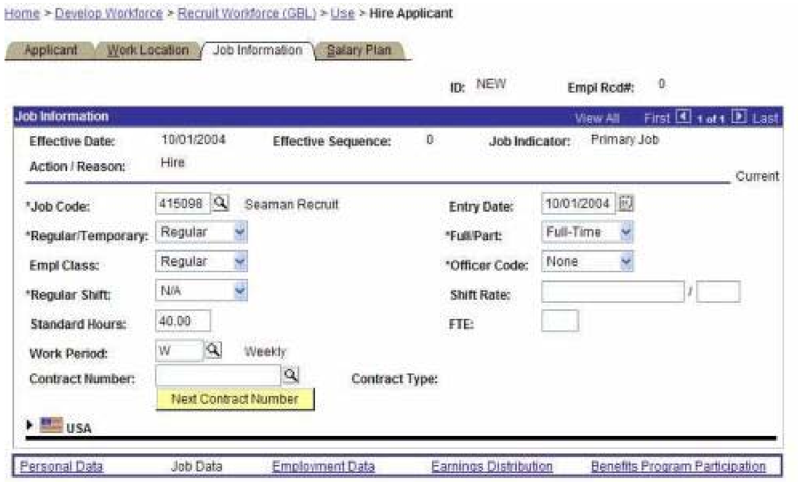
</td></tr>
</table>

Continued on next page

Hire Applicant, Continued

Procedure (continued)

Step	Action
6	After you have reviewed and verified the Work Location tab, click on the **Job Information** tab.



There are two fields on this tab that will need to be changed from their default values depending on the type of accession:

1. Job Code

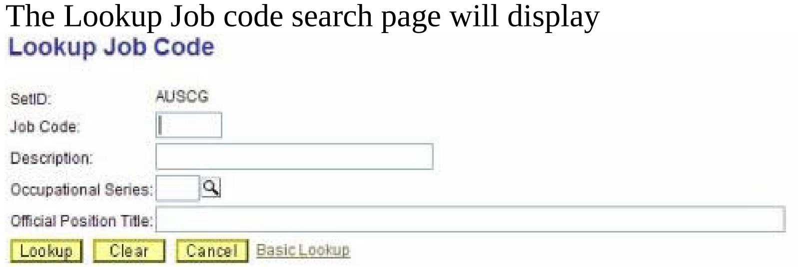
2 Entry Date

1. The "**Job Code**" is used to set the member's rate/rank & paygrade. It will default to the rate/rank associated with the Position ID/Job Requisition number entered on the Requisition Tab of the Applicant Data page. This field will need to be changed to reflect the member's rate/rank at the time of accession (Example: Member is authorized enlistment as a SN/E3 vice SR/E1 or a reservist enlisting under the RX program as a PS2 but assigned to an unbudgeted position, which are all SN/E3 billets).

Follow these steps to lookup and enter the correct Job Code:

A. Click the lookup icon  next to the Job Code field.

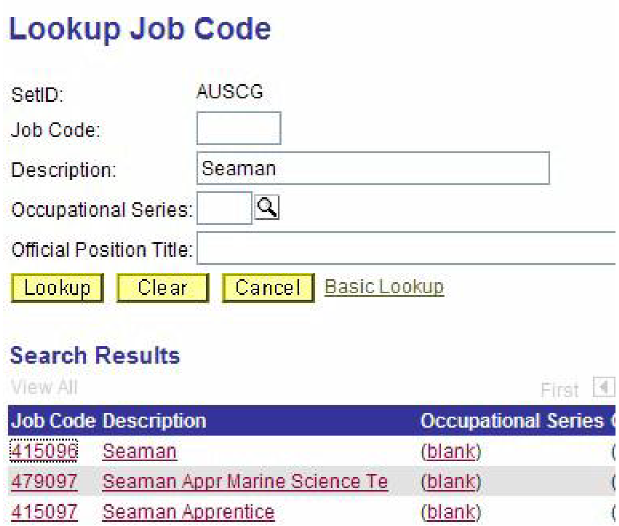
B. The Lookup Job code search page will display



Continued on next page

Hire Applicant, Continued

Procedure (continued)

Step	Action
6	C. Enter part of the name of the rate in the description field and click the Lookup button. **(Example 1: Searching on the first word of the rate name)**  . **(Example 2: Using the % character. See [Search Tips] for more information).** 

Continued on next page

Hire Applicant, Continued

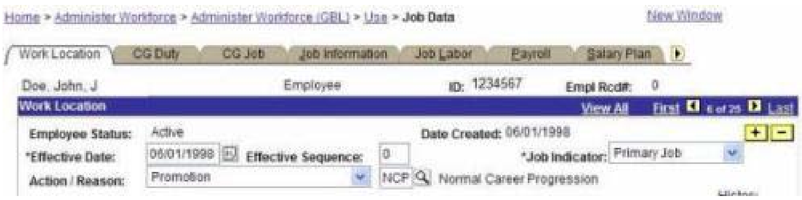
Procedure (continued)

Step	Action
6	D. Select the correct rate/grade from the search results E. You will be returned to the Job Information tab and the Job Code field will reflect the choice you selected from the search results *Job Code: 415096 Seaman F. A listing of Job Codes (as of 8/29/06) is available at http://www.uscg.mil/ppc/ps/global_workforce_inquiry_solution/job_codes.htm. **2. Entry Date:** A. The **Entry Date** is used to set the member's effective date of pay grade. The Entry Date defaults to the effective date for the accession as entered in Step 5 above. B. If this is a rehire with no break in service (e.g. Discharge to Immediate Enlistment) you must change the Entry Date to the effective date of advancement to present pay grade for the rating in which presently serving. This can be determined by accessing the member's job data (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) in "Include History *(by checking the* ☐ Include History *box or clicking* Include History *button)* " mode and locating the **effective date** of the most recent row with the **Action / Reason** of "**Promotion / NCP - Normal Career Progressio**n" C. If this is a rehire with a break in service of three months or less. The member retains their date of rate/grade (Job Code entry date) from their previous enlistment in accordance with 3.A.14.b.(4).(a) Enlisted Accessions, Evaluations and Advancements (COMDTINST M1000.2(series)). Therefore, you must change the Entry Date to the effective date of advancement to present pay grade for the rating in which presently serving. This can be determined by accessing the member's job data (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) in "Include History *(by checking the* ☐ Include History *box or clicking* Include History *button)* " mode and locating the **effective date** of the most recent row with the **Action / Reason** of "**Promotion / NCP - Normal Career Progressio**n". D. For a Reservist, who is enlisting in the Coast Guard (AD), this date must be constructed in accordance with 3.A.14.b Enlisted Accessions, Evaluations and Advancements (COMDTINST M1000.2(series))..

Continued on next page

Hire Applicant, Continued

Procedure (continued)

Step	Action
6	*In the example below, the effective date of the member's advancement was 06/01/1998.*  *The pay grade is shown on the Salary Plan tab, make sure it is correct change if necessary!.* 
7	Click on Salary Plan tab link. 1. Verify the **Salary Administration Plan** field: If you are completing an accession on an officer who has four or more years prior enlisted service **YOU MUST** click on the **Salary Plan** tab and set the Salary Administration Plan field to "OFE" (Officer with Prior Enlisted Service) and the Grade field to 01E, 02E or 03E (ENS, LTJG or LT with 4 or more years enlisted service). 2. Verify the **Grade** field. If must reflect the member's pay grade. Change it if necessary, then go back to the Job Code field on the previous tab (step 6) and verify you used the correct code. The Job Code field should have set the paygrade correctly for other than officers with prior enlisted service. 3. Verify the **Grade Entry Date** field: The **Grade Entry Date** will default to the date of the accession unless the **Entry Date** field on the **Job Information** tab is changed per the directions in Step 6 above. If this is a rehire with no break in service, change the Entry Date on the Job Information tab before completing this step.

Continued on next page

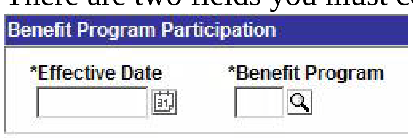
Hire Applicant, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>


</td></tr>
<tr><td>8</td><td>
After you have reviewed and verified Job Data, click on the Benefits Program Participation link at the bottom of the page.

There are two fields you must complete on this tab (shown below):



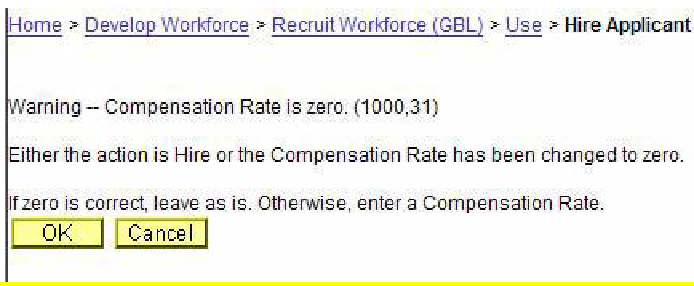
A. If this is a rehire you must click the [+] button to insert a new blank row.
B. Enter the date of the member's enlistment/accession in the Effective Date field.
C. Enter "CGA" in the Benefit Program field.
</td></tr>
</table>

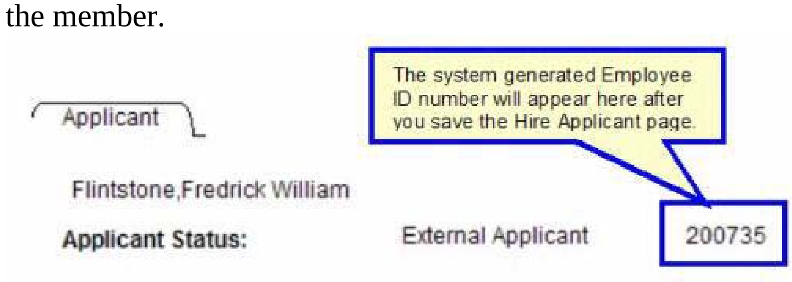
Continued on next page

Hire Applicant, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>
After you have entered the effective date and benefit program on the Benefit Program tab click the Applicant tab

If this member is changing components (e. g. Reservist who is enlisting in the regular Coast Guard), did you remember to approve and save the <u>discharge transaction</u> before you began the Hire Applicant process?
A. Click the Save button.
B. Click OK to acknowledge the warning message (It is not applicable to enlisted or officer accessions).


C. You'll also see a <u>WARNING</u> message regarding the need to account for any delay in reporting on the accession orders. <u>Disregard the warning if you are completing the accession for a Reservist</u> (including OCS candidates, DCOs and delayed entry program recruits, who are accessed in a Reserve Inactive Status to await the start date of their training) or if an active duty member is accessed into the Coast Guard and reports for duty the same day.
D. If this is 'New Hire' (e.g. The Automatic Emplid Assignment" radio button was marked.) make note of the Employee ID number assigned to the member.


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

Continued on next page

Hire Applicant, Continued

Procedure (continued)

Step	Action
10	If there was a delay in reporting (e.g. Member did not report for duty the same day he or she enlisted), you must access the endorsement on orders and account for the delay. Continue with the steps below to access the orders and endorsements. If you are completing an accession of a Reserve member, into an inactive status, t**here is no delay in reporting.** The member is accessed directly into the Coast Guard Reserve and assigned to a department on the date of accession. Any travel time or other delay in reporting for active duty will be recorded on the Reserve IADT or EAD orders. If the member is a reservist on IADT, you must create the IADT the orders and enter the accounting data and TONO provided on the member's original recruit travel order. Continue with the steps below to access the reserve orders component. If the member is not a reservist on IADT/EAD or reported for duty on the same day as he or she enlisted or accepted the oath of office, you have completed the Hire process and may exit the application.

What to do if an error is discovered after completing Hire Applicant

*****VERY IMPORTANT*****

Once the SPO has reviewed and approved the Accession, it is imperative that ALL data be verified correct on the same day.

- If erroneous data is discovered, submit a PPC Customer Care Trouble Ticket immediately, annotating what data fields are incorrect and what the data fields should read. Once you have received the auto confirmation e-mail with your ticket number, call Customer Care so that immediate action can be taken.

Reviewing the data and alerting PPC of errors on the same day is important because PPC can correct the accession prior to the data loading into JUMPS. If errors are discovered after the Accession has processed into JUMPS, corrections are much more difficult and will lead to several weeks of pay problems for the member.

Delay in Reporting

Introduction

This section only applies to members on active duty who may have a delay in reporting to their first unit or training site following enlistment, e.g. Member enlists in Hawaii and reports for recruit training at TRACEN Cape May the day after enlistment. Do not confuse this situation with "TEMDU En route", which is covered in Enclosure (3). This procedure is only used to account for additional travel time.

Note: If you are completing an accession of a Reserve member, into an inactive status, (including OCS candidates, DCOs and Delayed Entry Program (DEP) recruits, who are accessed in a Reserve Inactive Status to await the start date of their training) there is no delay in reporting. The member is accessed directly into the Coast Guard Reserve and assigned to a department on the date of accession. Any travel time or other delay in reporting for active duty will be recorded on the Reserve IADT or EAD orders.

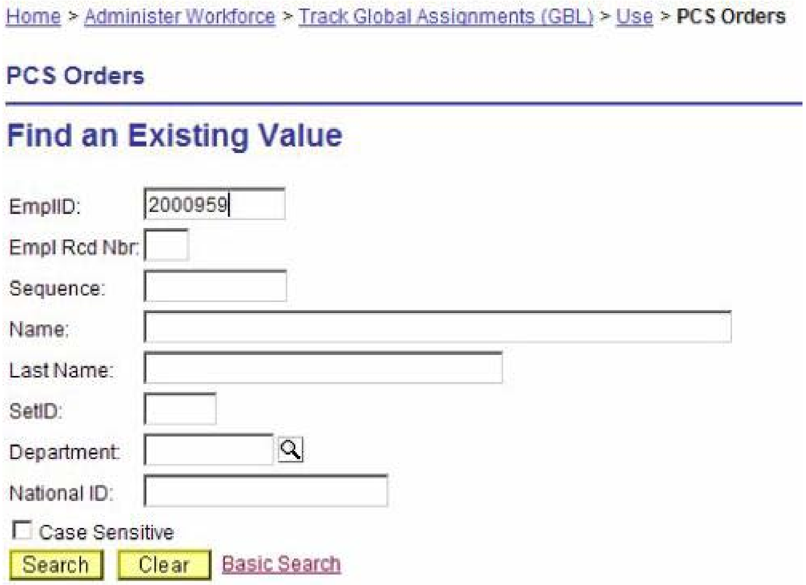
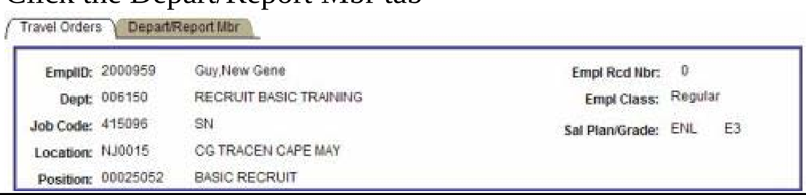
Procedure

Follow these steps if the member did not report for duty on the same day as enlisted/accessed: (Note you must also set the correct dates on the Personal Data and Job Data pages as described in Steps 4 and 5 of "Hire Applicant" before completing the endorsement on orders.

Note: This procedure must be completed by a user with the CGHRSUP (SPO Supervisor) role. It should be carried out after completing the Hire Applicant procedure.

Continued on next page

Delay in Reporting, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the PCS Orders component, enter the Employee ID number, and click the Search button.

</td></tr>
<tr><td>2</td><td>Click the Depart/Report Mbr tab

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

Continued on next page

Delay in Reporting, Continued

Procedure (continued)

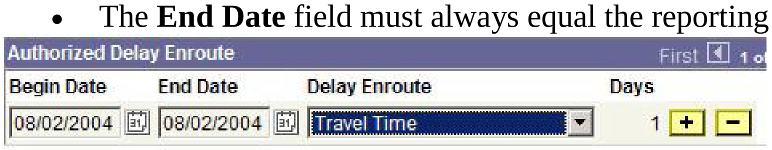
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Locate the 'Original Departure Information' block and change the Actual Depart Date field to the date of the member's enlistment/accession (it will be filled in with the Effective date you entered on the Name Tab of the Personal Data component in step 4 of the Hire Applicant instructions above).

In this example, the member enlisted on 08/01/04 and reported for duty on 8/02/04. The Actual Depart date field defaulted to 8/2/04 (the date the member reported for duty). The correct date should be 08/01/04 (the date the member enlisted), as shown below:


</td></tr>
<tr><td>4</td><td>Locate the 'Authorized Delay Enroute' block and enter dates and a reason for the delay.

In this example, the member enlisted on 08/01/04 and reported for duty on 08/02/04. The date of enlistment is a day of duty, we will enter 08/02/04 as a day of travel time to account for the delay.

The End Date field must always equal the reporting date.



You can use the + (add row button) to insert another row for a different type of delay if necessary.</td></tr>
<tr><td>5</td><td>Click Save. The system will generate endorsement on orders transactions.</td></tr>
</table>

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PPC SPO Manual

Part VIII, Accessions

Chapter 4, Post Hire Processing

Chapter Overview

Introduction

This section provides procedures, primarily for TRACEN SPOs, for completing transactions to record a new accession's pay entitlements. Other SPOs, processing accessions for members with a break in service, can use these procedures as well.

In this chapter

The following topics are covered in this chapter

Note: Effective 21 July 2011, you no longer have to wait a day after completing the Hire Applicant before the system will allow you access to the new member's entitlements. Pay entitlements, pay delivery option, and tax withholding may be entered anytime after the Hire Applicant is approved.

Tax Data Information

Introduction

This section provides procedures for recording employee tax data for new accessions.

About the Tax Data Component

The Employee Tax Data page has five tabs for data entry.

The usage of each tab is described below.

- The **Federal Tax Data 1** tab is used for the input various types of federal tax information including Special Tax Withholding Status, Tax Marital Status, Withholding Allowances and Additional Withholding.
- The **Federal Tax Data 2** tab is used for Earned Income Credit.
- The **Federal Tax Data 3** tab is used for the input of Foreign Country for Non Resident Aliens (Coast Guard Academy Cadets only).
- The **State Tax Data 1** tab holds State of Legal Residence, Special Tax Withholding Status, State Withholding Marital/Tax Status, Withholding Allowances and Additional Withholding.
- The **State Tax Data 2** tab is used for special rules that apply to Mississippi.

Timing

Prepare an employee federal tax data transaction when a person:

- Becomes a member of the Coast Guard, Coast Guard Reserve, NOAA Commissioned Officer Corps or is accepted as a cadet at the Coast Guard Academy.

- When submitting this transaction as part of an accession, ensure the effective date is the same as the accession date and the transactions, including a Payment Option Election, are all submitted in the same JUMPS update cycle.

Continued on next page

Tax Data Information, Continued

Supporting Documents

Change in State Tax Information must be supported by the following.

- Employee's Withholding Allowance Certificate (IRS Form W-4).
- State of Legal Residence Certificate (DD-2058 (CG)), or DD-2058-2 (for Native American State Tax Exemptions)
- Certificate of Nonresident Alien.
- Appropriate state tax income tax form.

Special Reporting to IRS

Regulations, issued by the Treasury Department, eliminated the requirement that employers send copies of potentially questionable Forms W-4, Employee's Withholding Allowance Certificate, to the IRS. The new regulations took effect on April 14, 2005.

In the past, employers had to send to the IRS any Form W-4 claiming more than 10 allowances or claiming complete exemption from withholding if $200 or more in weekly wages was expected.

Forms W-4 are still subject to review by the IRS. However, employers will no longer have to submit them to the tax agency, unless directed to do so in a written notice to the employer or pursuant to specified criteria set forth in future published guidance.

- Members claiming exemption from federal withholding must file a new IRS Form W-4 each year by **15 February.**
- Members claiming more than 10 withholding allowances from federal withholding must file a new IRS Form W-4 each year by **15 February**

State Taxes

The two charts in the Personnel and Pay Procedures Manual, PCSCINST M1000.2(series), State Tax Listing Pages 8-B-3 to 8-B-9 are helpful in explaining withholding requirements and providing useful state address information. This table is meant to supplement and add to, not replace, those charts.

The focus of this table is to categorize states by their processing similarities and provide an understanding of how each category should be treated when establishing or changing a member's state income tax information in Direct Access.

Continued on next page

Tax Data Information, Continued

State Tax Categories:

Category 1 -- States With No Income Tax

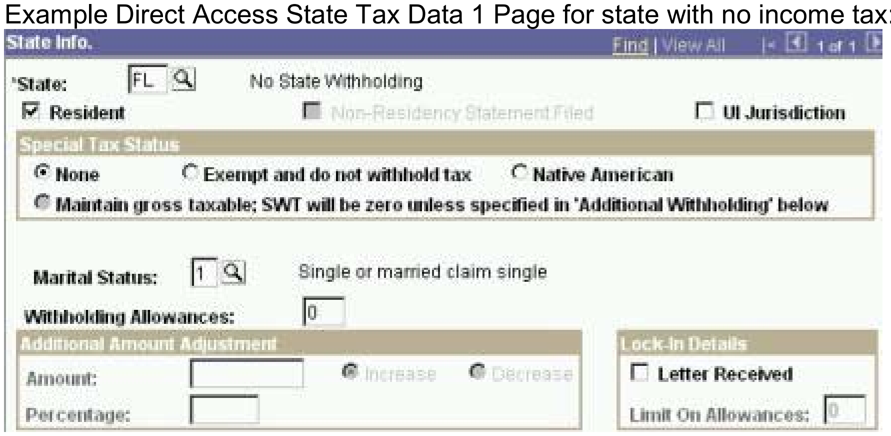
The following states do not have a state income tax:

Alaska (AK)	South Dakota (SD)
Florida (FL)	Texas (TX)
Nevada (NV)	Washington (WA)
New Hampshire (NH)	Wyoming (WY)

Direct Access procedures:

When establishing or changing state of legal residency to one of the above states, enter only State Code, ignoring Marital Status and Number of Exemptions fields. Their default values will not be passed to JUMPS.

Example Direct Access State Tax Data 1 Page for state with no income tax:



Continued on next page

Tax Data Information, Continued

Category 2 -- States That Do Not Have an Agreement to Withhold

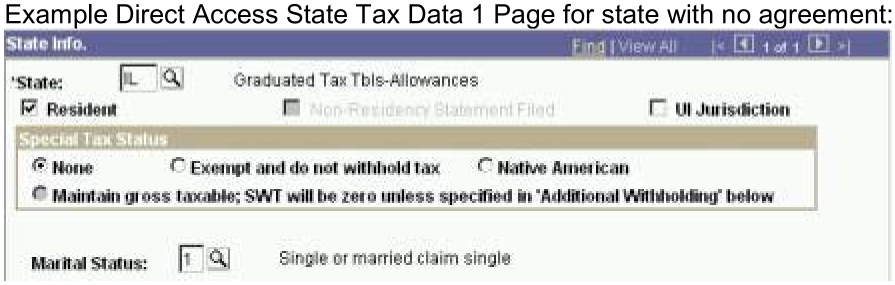
The following states (and U.S. Territories) have a state income tax but do not have an agreement with the Department of Treasury to withhold state income taxes from a military member's pay:

Illinois (IL)	American Samoa (AS)
Michigan (MI)	Guam (GU)
Tennessee (TN)	Virgin Islands (VI)
West Virginia (WV)	

Direct Access procedures:

When establishing or changing state of legal residency to one of the above states, enter only State Code, ignoring Marital Status and Number of Exemptions fields. Their default values will not be passed to JUMPS.

Example Direct Access State Tax Data 1 Page for state with no agreement:



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Tax Data Information, Continued

Category 3 -- States With Military Exemptions

The following states (and U.S. Territories) have a state income tax and have an agreement with the Department of Treasury to withhold state income taxes from a military member's pay, but have conditions which allow a member to claim exemption from paying those taxes. See PPPM 8-B for an explanation of the required conditions.

Arizona (AZ)	New Jersey (NJ)
California (CA)	New Mexico (NM)
Connecticut (CT)	New York (NY)
Idaho (ID)	Ohio
Minnesota (MN)	Oregon (OR)
Missouri (MO)	Pennsylvania (PA)
Montana (MT)	Puerto Rico (PR)
	Vermont (VT)

Direct Access procedures:

When establishing or changing state of legal residency for a member who meets the exemption conditions, enter State Code and indicate "Exempt and do not withhold tax" in the Special Tax Status field on State Tax Data 1 page, ignoring the Marital Status and Number of Exemptions fields. Their default values will not be passed to JUMPS. No state wages or taxes will be reported to JUMPS.

When establishing or changing state of legal residency for a member who does not meet the exemption conditions, enter State Code, Marital Status, and Number of Exemptions. Special Tax Status block on State Tax Data 1 page must indicate "None".

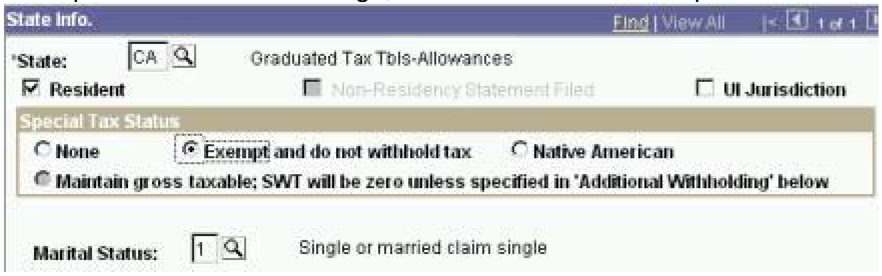
Members who claim one of the above states (for Puerto Rico see special rules) are automatically subject to state income tax when they are stationed inside that state/territory. After a reporting endorsement processes in JUMPS, a Direct Access tax event must be completed (either by member self-service or SPO) if the default values (single and zero) are not acceptable to the member.

Continued on next page

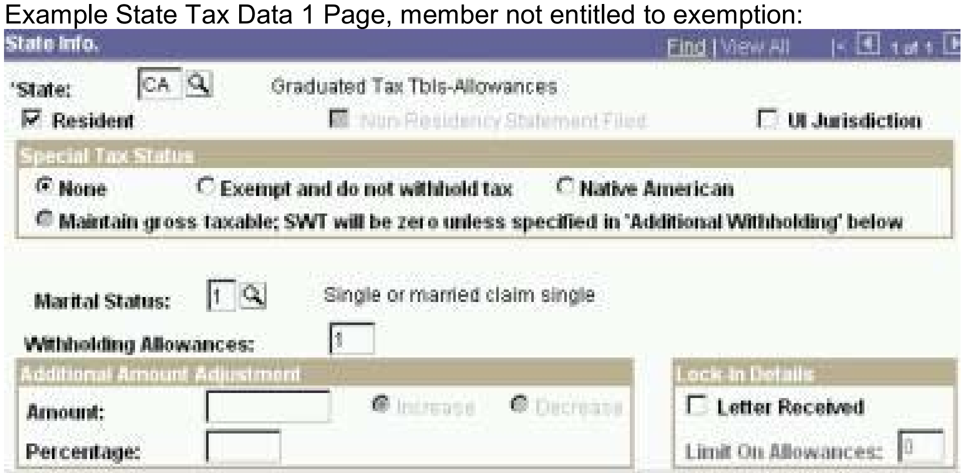
Tax Data Information, Continued

Category 3 -- States With Military Exemptions (Cont'd)

Example State Tax Data 1 Page, member entitled to exemption:



Example State Tax Data 1 Page, member not entitled to exemption:



Category 4 -- States With Agreements

The following states have a state income tax and an agreement to withhold state income tax from a CG member's pay:

Alabama (AL)	Indiana (IN)	Massachusetts (MA)	Oklahoma (OK)
Arkansas (AR)	Iowa (IA)	Mississippi (MS)*	Rhode Island (RI)
Colorado (CO)	Kansas (KS)	Nebraska (NE)	South Carolina (SC)
Delaware (DE)	Kentucky (KY)		Utah (UT)
District of Columbia (DC)	Louisiana (LA)	North Carolina (NC)	Virginia (VA)
Georgia (GA)	Maine (ME)	North Dakota (ND)	Wisconsin (WI)
Hawaii (HI)	Maryland (MD)		

Continued on next page

Tax Data Information, Continued

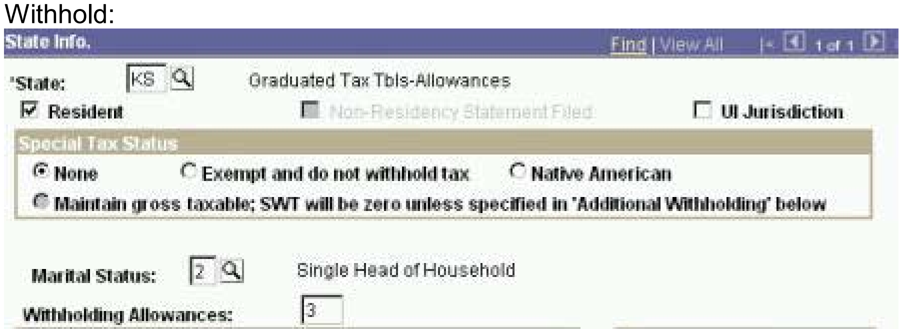
Category 4 -- States With Agreements (cont'd)

Direct Access procedures:

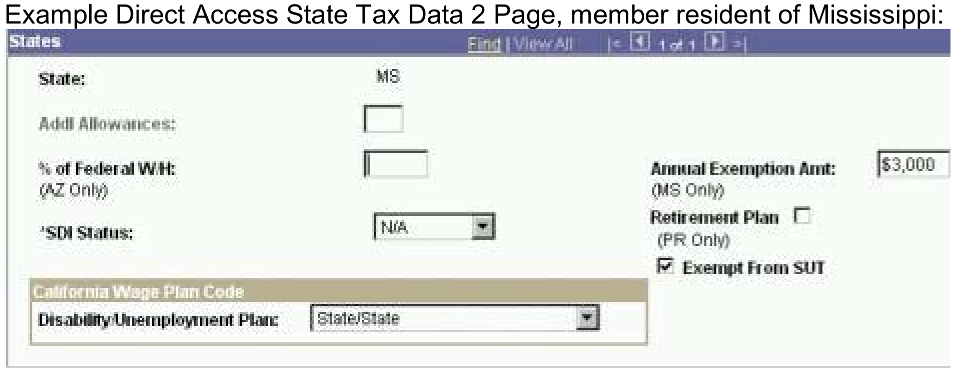
When establishing or changing state of legal residency, enter State Code, Marital Status and Number of Allowances.

* For residents of Mississippi, enter State Code (MS) and ignore the values in the Marital Status and Number of Exemptions fields. Enter a dollar amount in the Annual Exemption Amount block on State Tax Data 2 page.

Example Direct Access State Tax Data 1 Page for State With Agreement to Withhold:



Example Direct Access State Tax Data 2 Page, member resident of Mississippi:



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Tax Data Information, Continued

Category 5 -- Special State Tax Treatment for Native Americans

There are special procedures for eligible Native American service members who claim exemption from state tax withholding. Exemption is recorded by clicking the Native American tab in the Special Tax Status field on State Tax Data 1 page. The Marital Status and Number of Exemptions fields should not be completed; their default values will not be passed to JUMPS. No state wages or taxes will be reported to JUMPS.

Category 6 – Residents of Puerto Rico

Residents of Puerto Rico on active duty are subject to federal or state income tax withholding depending on their assignment in or outside of the 50 United States. The table below shows which tax is to be withheld based on the member's assignment.

If the member is assigned to duty	Then
in the US (one of the 50 states)	only federal income tax is withheld Member is exempt from state tax withholding
outside of the US	only Puerto Rico tax is withheld Member is exempt from federal tax withholding

When a member who claims Puerto Rico as the state of legal residence is stationed outside the United States, the SPO shall:

1. Submit a State Tax transaction. Ensure that "PR" is shown as the State of Legal Residence and that the "Exempt and do not withhold tax" radio button field denoting exemption from state tax is NOT marked (member is not exempt). Ensure the fields for Marital Status and No. State Exemptions Claimed are completed on the transaction.

   Note: The State Tax Transaction will automatically stop any federal tax withholding the member has. If the member wants both federal and Puerto Rico taxes withheld, the SPO shall submit a federal tax transaction (in addition to the state tax transaction).

When a member who claims Puerto Rico as the state of legal residence is stationed back in the United States, the SPO shall:

1. Submit a State Tax transaction. Ensure that "PR" is shown as the State of Legal Residence and that "*Exempt and do not withhold tax*" radio button field is marked denoting exemption from state tax.
2. Submit a Federal Tax transaction to begin federal withholding.

Continued on next page

Tax Data Information, Continued

Procedure Follow these steps to record a new member's tax data.

Step	Action
1	Select menu items in the following order: Home > Compensate Employees > Maintain Payroll Data (US) > Use > **Employee Tax Data**
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.**
3	The Employee Tax Data page will open, the *Federal Tax Data 1 tab* will be displayed. The Federal Tax Data 1 tab is used for the input various types of federal tax information including 'Special Tax Withholding Status', 'Tax Martial Status', Withholding Allowances' and 'Additional Withholding.

Continued on next page

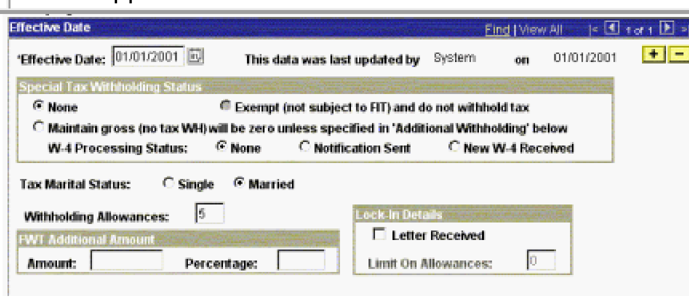
Tax Data Information, Continued

Procedure (continued)

Step	Action
4	Choose the appropriate tab for the type of tax change and complete the fields as described below.

FEDERAL TAX 1

Field	Description/Instructions
Effective date	The date defaults to current date. This date may not be future dated
Special Tax Withholding Status	This field defaults to None. Change it to "Maintain gross option if "Exempt" status indicated on Line 7 of Form W-4.
W-4 Processing status	This field defaults to None.
Tax Marital Status:	Tax Marital Status defaults to Single. Click either 'Single' or 'Married'. If member elects 'Married at the Higher Single Rate' on the W-4, click 'Single'.
Withholding Allowances:	Withholding Allowances defaults to zero. Enter the number of allowances claimed by the member on IRS Form W-4. • Nonresident aliens who are not residents of Canada, Mexico or Puerto Rico cannot claim more than ONE allowance on IRS Form W-4. • Members who claim more than 10 exemptions must file a new IRS Form W-4 each year by 15 February.
Additional Withholding Amount	Enter the dollar amount of additional tax to be withheld monthly. This amount must be whole dollars.
Percentage	Not applicable.
Lock-In Details	The fields in this block are not applicable and will not be used by the USCG application.



Continued on next page

Tax Data Information, Continued

Procedure (continued)

Step	Action
FEDERAL TAX 2	Note: No changes are required on this tab unless the member is requesting advanced payment of Earned Income Credit (EIC).

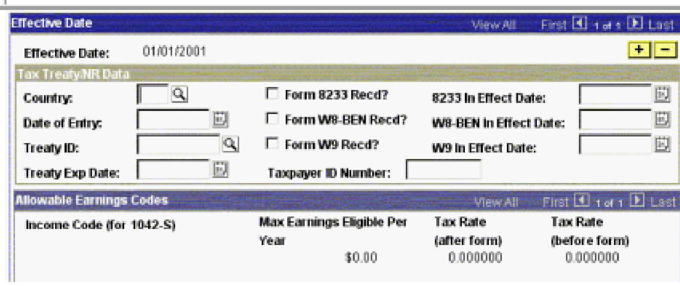
Field	Description/Instructions
Effective date	Copied from the Federal Tax Data 1 tab.
Federal tax data last updated by:	Shows the date the member's federal tax data was last updated.
Exempt From FUT	Direct Access will automatically check this field.
Use Total Wages for Multi-Stat Employee	Not used.
Earned Income Credit	Leave default entry of "Not Applicable" unless the member is claiming advance EIC. If the member is entitled to EIC, choose the appropriate filling status from IRS Form W-5. If on the W-5 the member has entered "Yes" in item 1 and item 3 is either blank or "No", choose: • Single, or Married without spouse filing If on the W-5 the member has entered "Yes" in item 1 **and** item 3, choose: • Married with both spouses filing If item 1 of the W-5 is blank or "No", choose: • Not Applicable
W-5 Processing Status	Not applicable.
W-2 Reporting	Not applicable.

Continued on next page

Tax Data Information, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>FEDERAL TAX 3</td><td>
<table>
<tr><td>Note:</td><td>No changes are required on this tab unless the member is a non-resident alien.</td></tr>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Effective Date</td><td>Copied from the Federal Tax Data 1 tab.</td></tr>
<tr><td>Country</td><td>Enter the member's Country if member is a non-resident alien.</td></tr>
<tr><td>All other fields on this page</td><td>The other fields on this page are not applicable and will not be used in the USCG application.</td></tr>
</table>



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

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Tax Data Information, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>State Tax Tabs</td></tr>
<tr><td>STATETAX1</td><td>
Note: See the State Tax Withholding Data Entry Procedures, earlier in this topic, for more detailed instructions on completing the State Tax Data tab.
<table>
<tr><th>Field</th><th>Description/Instructions</th></tr>
<tr><td>Effective Date</td><td>Copied from the Federal Tax Data 1 tab.</td></tr>
<tr><td>State</td><td>Enter the member's State of Legal Residence. The drop-down menu lists standard two-letter abbreviation codes to choose from.</td></tr>
<tr><td>Resident</td><td>Leave this field selected (checked).</td></tr>
<tr><td>UI Jurisdiction</td><td>Leave this field blank (unchecked).</td></tr>
<tr><td>Special Tax Withholding Status</td><td>Refer to the State Tax Withholding Data Entry Procedures, earlier topic, to complete this field.
Choose:
None, if member is not entitled to any exemption from state income tax withholding (e.g. Member's state does not provide an exemption for military personnel who live outside the state or member is currently stationed in their State of Legal Residence)
Exempt and do not withhold tax, if member is entitled to an exemption from state income tax withholding (e. g. Member's state exempts income earned by military personnel stationed outside the state).</td></tr>
</table>


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

Continued on next page

Tax Data Information, Continued

Procedure (continued)

Step	Action	
STATETAX1	Special Tax Withholding Status	• **Note**: States that qualify are AZ, CA, CT, ID, PA, MO, MN, MT, NJ, NY, OR, PR and VT. Puerto Rico (PR) residents: See Federal and State Income Tax Withholding for Residents of Puerto Rico on Active Duty for special rules • Native American, if member is a Native American and meets eligibility requirements. The Department of Defense is working on a new DD Form 2058-2 (Native American Income Tax Exemption Certificate) for eligible Native Americans to sign. Until the DD Form 2058-2 is available, the SPO will have eligible Native Americans sign DD-2058, State of Legal Residence Certificate, and attach a separate page to the DD-2058 stating the following information: A. Name of the federally recognized tribe to which the member belongs. B. Name of the federally recognized tribal reservation or Indian country the member claims as their domicile (include the name of the state the reservation is located). The "Maintain gross taxable..." option is not used.
	Marital Status	Click the button and choose the appropriate state marital status code. If exempt from state taxes, leave this field at the default or current status. Do not change it. 1 Single or married claim single 2 Single Head of Household 3 Married, claiming self 4 Married, claim self and spouse 5 Married filing jointly
	Withholding Allowances	Enter the number of allowances claimed by the member for state tax withholding purposes. If exempt from state taxes, leave this field at the default or current number. Do not change it.
	Additional Withholding Amount	Enter the whole dollar amount, if any, of additional tax to be withheld monthly.
	Additional Withholding Percentage	Not used, leave blank.
	Lock in Details	Not used, leave blank.

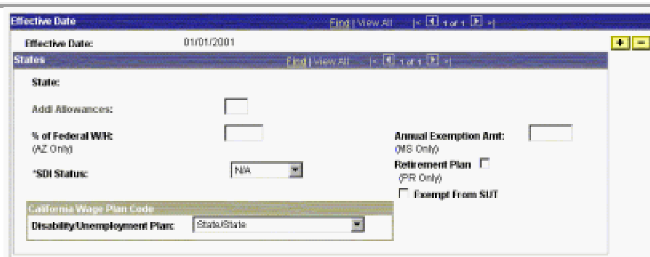
Continued on next page

Tax Data Information, Continued

Procedure (continued)

Step	Action
STATE TAX 2	See table below

Note:	No changes are required on this tab unless the member's State of Legal Residence is Mississippi.
Field	**Description/Instructions**
Effective Date	Copied from Federal Tax Data 1 tab
State	State of Legal Residence, copied from State Tax Data 1 tab.
Addl Allowances	Not used, leave blank
% of Federal WH (AZ Only)	Not used, leave blank.
Annual Exemption Amt (MS Only)	If the member is a resident of Mississippi, enter the Exemption Amount.
SDI Status	Not used, leave as default "N/A".
Retirement Plan	Not used, leave blank.
Exempt From SUT	Not used, leave checked
California Wage Plan Code	Not used, leave default "State/State".



Continued on next page

Tax Data Information, Continued

Procedure (cont'd)

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

After completing all applicable fields click 

the button.

Payment Option Election

Introduction

This section provides procedures for entering Payment Option Election (POE) information into Direct Access.

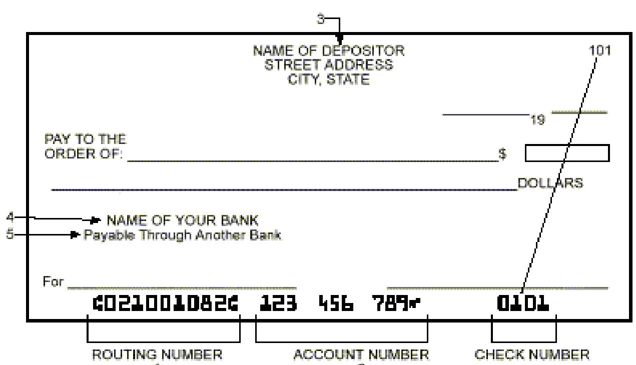
- SPO and PPC users can create a member's first POE or add a new one when a member wants to change accounts or have their pay accrued at PPC.
- CG Academy and PPC users can use the Cadet Fund option when a cadet has submitted a new POE and subsequently does not graduate.

Timing

Be sure to submit this transaction when a person becomes a member of the Coast Guard, Coast Guard Reserve, NOAA Commissioned Officer Corps or is accepted as a cadet at the Coast Guard Academy. When submitting this transaction as part of an accession, ensure the effective date is the same as the accession date and the transactions, including a Employee Tax Data Information transaction, are all submitted in the same JUMPS update cycle.

Account and Bank Routing/Bank ID Numbers

You can obtain the Account and Bank ID numbers from a voided check (as shown below) or from information provided on the Payment Option Election Worksheet (CG-PPC-2015).

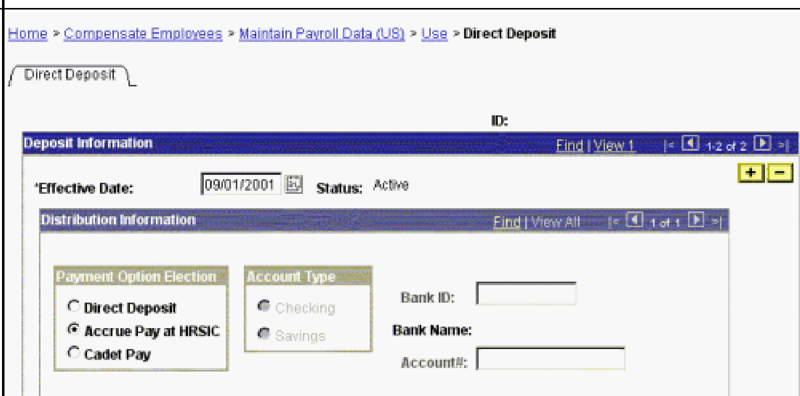


1. ROUTING TRANSIT/BANK ID Number. Entered in Direct Access as "021001082"
2. ACCOUNT NUMBER. Entered in Direct Access as "123456789". No spaces are allowed. If dashes are indicated, they may be entered.
3. ACCOUNT TITLE. Must include employee name.
4. FINANCIAL INSTITUTION NAME.
5. If your check or sharedraft includes "payable through" under the bank name, contact the financial institution to help obtain the correct Bank ID number for Direct Deposit processing.

Continued on next page

Payment Option Election, Continued

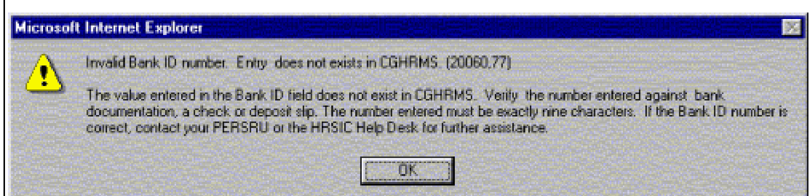
Procedure Follow these steps to set up a new member's POE

Step	Action
1	Select menu items in the following order:
	Home > Compensate Employees > Maintain Payroll Data (US) > Use > **Direct Deposit**
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 Direct Deposit page will display.
4	 Click the + button to create a new Direct Deposit. A new row will be inserted.
5	The effective date field will show the current date, you may change it if necessary, by directly entering the date or choosing one by clicking on the icon. Refer to the Effective Date discussion above for more information.

Continued on next page

Payment Option Election, Continued

Procedure (continued)

Step	Action
6	Select the Payment Option Election by clicking the radio button for the option desired. If you choose Direct Deposit, the Account Type, Bank ID and Account # fields will also need to be completed. If you choose either of the other options, these fields will be grayed out. If you selected Accrue Pay at PPC or Cadet Pay, click the Save button. If you selected Direct Deposit complete the remaining fields.
7	Enter the 9-digit bank routing number in the **Bank ID** field. Notes: • This entry will be validated when you exit out of the field. The Bank Name field will display the name of the bank corresponding to the ID number you entered. • Only valid entries are allowed. • If for some reason the Bank ID is not in the system, please contact PPC Customer Care at (866) 772-8724 (toll free) or (785) 339-2200, for assistance.  Invalid Bank ID error message.
8	Enter the account number in the **Account #** field. Notes: • This field is limited to 17 alphanumeric characters. • Dashes (-) are allowed. • No spaces are allowed.
9	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 Save button. Click the Return to Search button if you have more POE transactions to complete or use the menu links to exit the application.

Creating IADT Orders

Introduction

If the new member is a reservist on IADT (a reservist who enlisted under the RP, RK, or RL program or a person coming from civilian status and attending OCS), you must create the IADT orders.

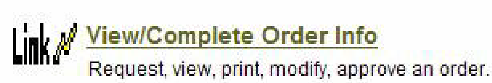
The IADT orders will place the member in an active pay status (simply submitting the accession transactions alone will not place the member on active duty).

Before you begin

Submit a Reserve Member Status transaction to set the member's Employee Class to "SELRES" and the Reserve Training Pay Code to "F" (IADT). See http://www.uscg.mil/ppc/ps/reservestatus/reserve_status.htm for procedures.

Procedure

Follow these steps to create the IADT orders.

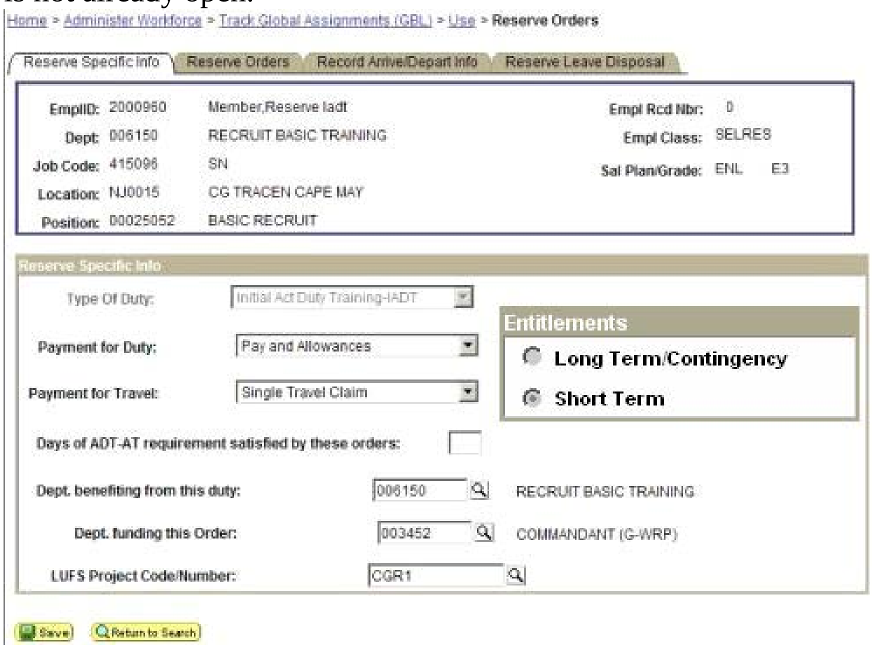
Step	Action
1	Select the following menu items: Home > Administer Workforce > Track Global Assignments (GBL) > Use > **Reserve Orders** The reserve orders home page will display. Select the View/Complete Order Info link on 
2	Click the 'Add a New Value' link, enter the Employee ID number and click the Add button.  The Empl Rcd Nbr is now provided for you and will represent the uniformed employee classification.

Continued on next page

Creating IADT Orders, Continued

Procedure (continued)

Step	Action
3	The Reserve Orders page will display, click the Reserve Specific Info tab if it is not already open.



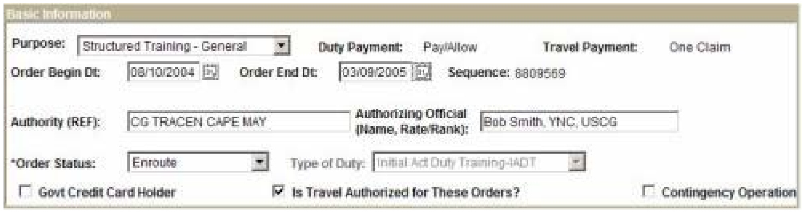
Complete the following data fields.

Field	Entry
Type of Duty	Select '**Initial Act Duty Training - IADT**' from the drop-down list
Payment for Duty	Select 'Pay and Allowances' from the drop-down list
Payment for Travel	Select 'Single Travel Claim' from the drop-down list
Entitlements	For IADT in connection with an RK/RP Accession, select the "Long Term" entitlements option, regardless of the actual expected duration of the active duty. Select Short-Term for SELRES DCO/ROCI school IADT orders.
Dept Benefiting from this duty	Completed by system with Department ID of member's current unit (traces back to the requisition number used in the accession), **Change it to the ID for the location where the member will be assigned for IADT (Academy or TRACEN Cape May)**
Dept. funding this Order	Enter '003452'.
LUFS Project Code	Will be filled in by system, no need to change.

Continued on next page

Creating IADT Orders, Continued

Procedure (continued)

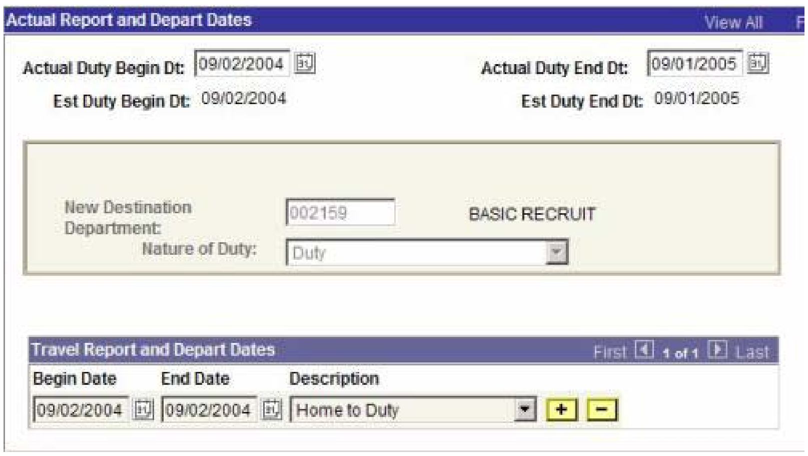
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click the Reserve Orders tab.


Complete the following data fields.
<table>
<tr><th>Field</th><th>Entry</th></tr>
<tr><td>Purpose</td><td>Select 'Structured Training-General' from the drop-down list.</td></tr>
<tr><td>Order Begin Dt</td><td>Enter the date the member is scheduled to begin travel to the IADT site. This is normally one day prior to the class convening date unless the member is traveling from O'CONUS and more than 1 day of travel time is authorized. Travel via POC is not authorized on accession orders.</td></tr>
<tr><td>Order End date</td><td>Enter the date the member will complete IADT and return home.
If these are long-term orders (RK/RP) the date must be more than 139 days from the begin date.</td></tr>
<tr><td>Authorizing Official</td><td>Enter the name of the person signing the orders.</td></tr>
<tr><td>Is Travel Authorized...?</td><td>Mark this checkbox.</td></tr>
</table></td></tr>
<tr><td>5</td><td>Complete the Partial Entitlements tab for short-term orders.
<table>
<tr><th>Field</th><th>Enter Code</th></tr>
<tr><td>BAH RC Entitlement Code</td><td>Member without dependents – "G"
Member with dependents – "L"
Member authorized BAH at the With Dependents rate based on payment of child support – "T"
Order more than 30 days, member entitled to BAH – "W". Submit Pay Entitlements transaction to start BAH</td></tr>
<tr><td>Travel BAS Entitlement</td><td>"E" Enlisted BAS.</td></tr>
<tr><td>Duty BAS Entitlement</td><td>"N" No Entitlements (Per CG PAYMAN, Figure 3-2, rule 10, when an enlisted member is in recruit training or non-prior service member attending OCS, then the BAS entitlement is none.)</td></tr>
</table></td></tr>
<tr><td>6</td><td>Click the Route for Approval button. Click the drop-down menu next to Approval Status and select "Approved". If you do not have access the Approval Status drop-down menu, you must forward the orders to someone with the correct user role. Enter the approver's employee ID in the Forward To block, and their email address in the Email address block and Click OK.</td></tr>
</table>

Continued on next page

Creating IADT Orders, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Click the Save button.</td></tr>
<tr><td>8</td><td>Click the Record Arrive/Depart Info tab (Note: The remaining steps cannot be completed unless the order's approval status has been set to "Approved" and the order has been saved.


a. Complete the "Actual Duty Begin Dt" field with the date the member enlisted or was appointed (Same as 'Est Duty Begin Dt).

b. Complete the "Actual Duty End Dt" field with the date the IADT orders end.

Note: On Long-Term orders this date is not a 'hard' date even though the field is named "Actual Duty End ..", the date you enter here is merely an estimate of when the IADT will end. The Release from Active Duty (RELAD) process will close out the orders and update the field to reflect the real completion of IADT date.

c. Complete the 'Travel Report and Depart Dates" section by setting the Begin Date and End Date fields to match the Actual Duty Begin Dt/Date of Accession and selection "Home to Duty" from the drop-down menu.</td></tr>
<tr><td>9</td><td>Click Save to save the endorsement.</td></tr>
</table>

Pay Entitlements for New Hires

Introduction

The following tables provide guidance for TRACEN Cape May and "A" Schools for managing pay entitlements in conjunction with Accessions / New Hires.

Discussion

The major points that the procedures attempt to address are:

1. For Reserve RP/RK accessions, in addition to the normal accession process, there is a requirement to Create IADT Orders. The IADT orders are necessary to place the member in an active pay status. If the member is accessed but no orders are completed the member will not be in an active pay status.
2. When a Reserve RP member is transferred from Cape May to "A" School, CGPSC (epm) will need to issue PCS orders and the SPOs at the TRACENs will need to complete the endorsements, just like a regular active duty member.
3. RK members are issued separate IADT orders for completion of Phase II training (OJT/Class "A" School).

Guidance

The following additional guidance is available:

Topic	See Page
Entitlement Summary for members ordered to active duty of 140 days or more (USCG or USCGR RP) basic training followed by “A” school	VIII-4-30
TRACEN Cape May input upon reporting	VIII-4-31
TRACEN Cape May input upon graduation for transfer to “A” School	VIII-4-32
“A” School SPO input upon reporting to start/update entitlements of newly-hired members assigned to “A” school immediately after basic training	VIII-4-33

Continued on next page

Pay Entitlements for New Hires, Continued

ORDERED TO ACTIVE DUTY OF 140 DAYS OR MORE (USCG or USCGR RP) BASIC TRAINING FOLLOWED BY "A" SCHOOL

Entitlement	While at Basic Training		While Enroute From Basic Training to "A" School		While At "A" School		Reference
	Mbrs w/o Deps	**Mbrs w/Deps (see note 1)**	**Mbrs w/o Deps**	**Mbrs w/ Deps (see note 1)**	**Mbrs w/o Deps**	**Mbrs w/ Deps (see note 1)**	
Basic Pay	Yes	Yes	Yes	Yes	Yes	Yes	Figure 2-2, Rule 3, CG Pay Manual
BAH	Active Duty - Partial BAH Reserve IADT –BAH w/o at location of perm residence	BAH @ location of the dependents.	Active Duty - BAH @ In-Transit Rate Reserve IADT BAH w/o	BAH @ location of the dependents.	Active Duty - Partial BAH Reserve IADT –BAH w/o at location of perm residence	BAH @ location of the dependents.	Figure 3-7, Rules 1 & 15, and Figure 3-10, Rule 19, CG Pay Manual
CONUS COLA	Yes @ Cape May locale	Yes @ location of the dependents	Yes @ Cape May locale (less travel time)	Yes @ location of the dependents (less travel time)	Yes @ "A" School locale	Yes @ location of the dependents	Section U8012, JFTR
BAS	No	No	Enlisted BAS (ENL BAS)	Enlisted BAS (ENL BAS)	ENL BAS minus DISCOUNT MEAL RATE	ENL BAS minus DISCOUNT MEAL RATE	Figure 3-2, Rule 10, & Figure 3-4, Rules 1 & 3, CG Pay Manual
FSA-T	No	Yes	No	Yes (less leave, proceed time, and nonchargeable absence)	No	Yes, if deps do not relocate to the "A" School site	Figure 3-19, Rule 10, CG Pay Manual
Leave & Non-Chargeable Absence for Hometown Recruiting Program	N/A	N/A	Yes	Yes	N/A	N/A	Articles 7.A.5 & 7.A.10, CG Personnel Manual

Note: 1. If the dependents reside in a non-BAH eligible locale (e.g., Guam or Puerto Rico), then BAH-for the location of the TRACEN is payable. Members without dependents who do not have primary physical custody of a dependent child but are paying child support are entitled to BAH-Child or BAH-Transit Rate-Child.

Continued on next page

Pay Entitlements for New Hires, Continued

TRACEN CAPE MAY INPUT

ORDERED TO ACTIVE DUTY OF 140 DAYS OR MORE (USCG or USCGR RP)

Entitlement	Direct Access Input for USCG Member	Direct Access Input for USCGR RP Member	JUMPS Results
Basic Pay Start	Develop Workforce > Recruit Workforce (GBL) > Use > Applicant Data / Identification Data / Education / Test Results / Applicant Contract Data / Hire Applicant	Develop Workforce > Recruit Workforce (GBL) > Use > Applicant Data / Identification Data / Education / Test Results / Applicant Contract Data / Hire Applicant	L61A and L68C (rptg) generated. Segment 01 and associated Segments opened.
		Administer Workforce > Track Global Assignments (GBL) > Use > Reserve Orders	L68C's (dptg & rptg) generated. Segments 00, 57, 81 and 82 updated.
BAH Start	Administer Workforce > Administer Workforce (GBL) > Use > Dependency/Emergency Data Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	Administer Workforce > Administer Workforce (GBL) > Use > Dependency/Emergency Data Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	L64 generated to update dependency data. P606 generated to start Partial BAH, BAH, or BAH-In Transit, as applicable. Segment 17 or 19 or 34 opened.
CONUS COLA Start	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	P607 generated to start CONUS COLA at applicable locale. Segment 31 opened.
FSA-T Start (members w/deps)	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	L6BB generated. Segment 22 opened.

Continued on next page

Pay Entitlements for New Hires, Continued

TRACEN CAPE MAY INPUT
TO TRANSFER NEWLY-HIRED MEMBERS TO “A” SCHOOL

Entitlement	Direct Access Input for USCG Member	Direct Access Input for USCGR RP Member	JUMPS Results
BAH w/o deps Start	Administer Workforce > Track Global Assignments (GBL) > Use > PCS Orders	Administer Workforce > Track Global Assignments (GBL) > Use > PCS Orders	L68C (dptg) generated. Segment 19 closed. Segment 35 opened for mbrs w/o deps eff date of departure PCS.
BAS Start	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	P607 generated eff date of graduation. Segment 24 opened.

Continued on next page

Pay Entitlements for New Hires, Continued

"A" SCHOOL INPUT

TO START/UPDATE ENTITLEMENTS OF NEWLY-HIRED MEMBERS ASSIGNED TO "A" SCHOOL IMMEDIATELY AFTER BASIC TRAINING

<table>
<tr><th colspan="4">BAH-PCS Entitlements for Active Duty* Members Without Dependents</th></tr>
<tr><th>When</th><th>And</th><th>Then</th><th>Transaction(s) Submitted by</th></tr>
<tr><td rowspan="2">Completes Recruit, OCS, or Academy training</td><td>member has no prior military service</td><td>Member is entitled to BAH-In Transit-W/O effective the date of departure until the day prior to reporting.<table><tr><th>Earn Cd</th><th>Type</th><th>Detail</th></tr><tr><td>BA2</td><td>BAH-G or BAH-H
(if spouse in service)</td><td>Zip '00000'</td></tr></table></td><td rowspan="2">Reporting SPO (inputs BAH-In Transit or BAH W/O start effective date of PCS departure, BAH-In Transit or BAH W/O stop effective the day prior to PCS reporting, reporting endorsement and transaction to record BAH entitlement at new PDS)</td></tr>
<tr><td>member has prior military service</td><td>Member is entitled to BAH-W/O at the rate for the PDS they are departing from effective the date of departure until the day prior to reporting.

Note that the reporting SPO must submit transactions for these members. The JUMPS auto-credit does not apply if the member is completing accession training.</td></tr>
</table>

*Reservists w/o dependents on IADT are authorized BAH if they maintain a primary residence (e. g. Paying rent or own a home) while on orders. They are not considered to be occupying gov't qtrs.

Entitlement	Direct Access Input	JUMPS Results
BAH, CONUS COLA, BAS, & FSA-T Stops. Leave & Non-Chargeable Absence Charges	Administer Workforce > Track Global Assignments (GBL) > Use > PCS Orders	L68C (rptg) needs to be generated to report member aboard & account for leave used and non-chargeable absence. L68C (rptg) will stop segments 17, 19, 22, 31, 34, and 35. L68C will charge leave to segment 74.
BAH Start	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	P606 needs to be generated to start Partial BAH, BAH, or BAH-In Transit, as applicable, eff the date of reporting to "A" School. Segment 17 or 19 or 34 will be opened.
CONUS COLA Start	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	P607 needs to be generated to start CONUS COLA at applicable locale eff the date of reporting to "A" School. Segment 31 will be opened.
BAS Start	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	P607 needs to be generated to start ENL BAS minus DISCOUNT MEAL RATE eff the day after reporting to "A" School. Segments 24 and 27 will be opened.
FSA-T Start (members w/deps)	Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	L6BB is generated eff the date of reporting to "A" School (unless deps relocate to the "A" School locale). Segment 22 will be opened.

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PPC SPO Manual

Part VIII, Accessions

Chapter 5, Direct Commission Officer (DCO) Processing

Overview

Introduction

This chapter provides an overview of the steps necessary to process a DCO's accession into the Coast Guard, attendance at DCO School and subsequent transfer to first permanent duty station (PDS).

References

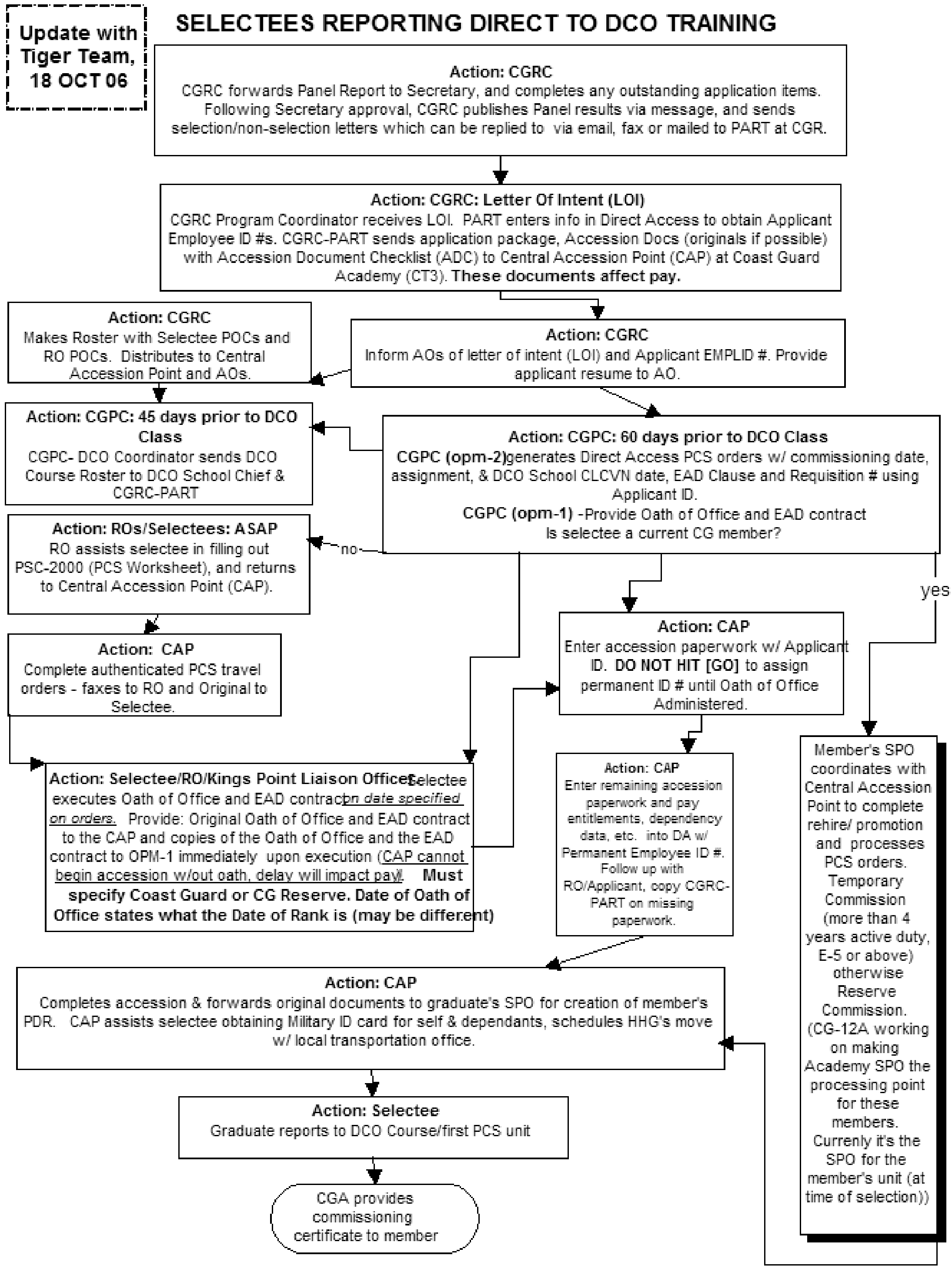
The following directives provide additional information about the DCO program:

(a) CG Personnel Manual, COMDTINST M1000.6(series), Sec. 1-B-1.b
(b) Reserve Policy Manual, COMDTINST M10001.28(series), Sec. 1.E.3.a.
(c) CG Recruiting Manual, COMDTINST M1100.2(series)

Contents

The following topics are covered in this chapter:

The Process



Continued on next page

The Process, Continued

DCO Process This table provides an overview of the DCO process.

<table>
<tr><th>Stage</th><th colspan="2">What</th><th>When</th><th>Who</th></tr>
<tr><td>1</td><td colspan="2">Announcement of Selection Panel Schedule for the next fiscal year.
Example: ALCGRECRUITING 009/05</td><td>July</td><td>CGRC</td></tr>
<tr><td>2</td><td colspan="2">Submit packages</td><td>By deadline for program as announced</td><td>Applicants (via local recruiter for non-CG members or via unit ESO for CG members)</td></tr>
<tr><td>3</td><td colspan="2">Selection panels meet and message announcing selectees and alternateness released
Example: ALCGRECRUITING 001/05</td><td>As announced is schedule</td><td>CGRC</td></tr>
<tr><td>4</td><td colspan="2">Sends letter with additional commissioning requirements to primary selectees (This includes the Letter of Intent (LOI), which must be signed and returned)</td><td>Upon release of message.</td><td>CGRC</td></tr>
<tr><td>4</td><td colspan="2">Completes commissioning requirements (including the LOI)</td><td>As directed by CGRC (date is on the ltr).</td><td>Primary selectees.</td></tr>
<tr><td rowspan="3">5</td><td colspan="2">Adds selectee to DA as an Applicant.</td><td>Upon receipt of the LOI</td><td>CGRC</td></tr>
<tr><td colspan="2">Schedules selectees for DCO class in DA
Issues PCS/EAD orders in DA</td><td rowspan="2">Upon notification by CGRC (e. g. Appointment accepted)</td><td>CGPSC (opm-2) (DCO Coordinator) and AO</td></tr>
<tr><td colspan="2">Sends Oath of Office and EAD Contract</td><td>CGPSC (opm-1)</td></tr>
<tr><td>6</td><td colspan="2">Completes Oath of Office and other documents (e.g. EAD contract)</td><td>Upon receipt</td><td>Selectee</td></tr>
<tr><td rowspan="3">7</td><td>If</td><td>Then</td><td rowspan="3">Upon signing</td><td rowspan="3">Selectee</td></tr>
<tr><td>Current CG/CGR Member (other than IRR)</td><td>Takes oath and other paperwork to current SPO</td></tr>
<tr><td>Civilian or prior (non-CG) service or CGR (IRR)</td><td>Sends oath and other paperwork to Academy SPO (aka CAP)</td></tr>
<tr><td>8</td><td colspan="2">Completes accession and EAD orders</td><td>Upon receipt of documents from selectee</td><td>SPO</td></tr>
</table>

Continued on next page

The Process, Continued

Processing Point

DCO accessions are completed the Academy SPO. However, if the applicant is currently a member of the USCG or USCGR, their current SPO completes the discharge/accession.

From civilian status:

1. Accession as an officer with a reserve commission. Effective date of rank that is on the oath (which is pre-filled by CGPSC) (not more than 30 days before CCLVN date).
   Note: See process on page 5-6 for these types of accessions.
2. *What unit to use for accession?* CGPSC (rpm/IRR) (Job Req #145079, department ID #002817 and position #00095687), this will prevent system from charging for SGLI.
3. EAD Orders from date member departs home enroute to Academy (within reason for mode of travel) through end of EAD contract (Engineering Officers, Lawyers, Aviators, can be different).
4. *Date military obligation completed field?* For members with no prior service - 8 years from date of oath. If prior service, carry date forward from original accession.

From USCGR status:

1. Discharge
2. Accession
3. EAD

From Active Duty status: Current SPO completes:

1. Discharge
2. Accession (Employee Classification on Service Info tab of Contract Data: Regular=Temporary Commission or SELRES/IRR if Reserve Commission)
3. TDY to Academy
4. EAD (if Reserve Commission)/PCS if Temporary Commission)
5. Research possible entitlement to saved pay.

Note: If member is currently an active duty CWO, accepting a temporary commission, you must contact CGPSC (opm) and have them enter the separation authorization before you can complete the discharge. SPOs cannot initiate separations on officers.

Completing the Accession

Introduction

This section covers the intricacies of completing an accession for a DCO.

Before You Begin

If the DCO is currently a member of the CG or CGR, you must complete a discharge effective the day prior to the date the oath of office is effective. For the discharge use:

- SPD code:
  KGM-"Accept Commission or warrant in same branch of service" (reserve member/reserve commission) or
  KGN—"Accept Commission or warrant in another branch of service " (active duty member/reserve commission)
- Reason: Convenience of the Government.
- Type: Honorable
- Status: Accept Appointment as Officer

Note: If member is currently an active duty CWO, accepting a temporary commission, you must contact CGPSC (opm) and have them enter the separation authorization before you can complete the discharge. SPOs cannot initiate separations on officers.

Accession Notes

Complete DCO accessions as prescribed in Chapters 2 and 3 of this guide. When completing the accession keep these important points in mind:

See "Accession into the IRR" on the following page for officers who complete the Oath of Office before reporting for training.

- If the DCO has prior CG, CGR, PHS, CG Auxiliary or CG civilian employment USE THE EXISTING EMPLOYEE ID NUMBER (a.k.a "Rehire").
- Active Duty members will be accessed at their current unit and the EAD orders will "transfer" them to their new PDS as officers.
- Be sure to set the pay grade using the correct "Job Code" in **Step 6 of the Hire Applicant directions**.
- If you are completing an accession on an officer who has more than four years prior active duty enlisted service **YOU MUST** click on the **Salary Plan** tab and set the Salary Administration Plan field to "OFE" (Officer with Prior Enlisted Service) and set the Grade field to 01E, 02E or 03E (ENS, LTJG or LT with more than 4 years enlisted service).

Accession into the IRR

Introduction

DCO Program selectees, not on active duty, may execute the Oath of Office up to 30 days before reporting for training/commencing EAD. These officers are assigned to the IRR (Individual Ready Reserve) during the time between completing the Oath of Office and departing home on EAD orders, en route to the Academy, for DCO school.

Data Entry Notes

Keep these key points in mind when completing the accession for an officer who completes the Oath of Office 30 or less days prior to reporting for training:

Applicant Data Panel:

- Application date – Use the date of the Oath of Office.
- Requisition – Use Requisition number #145079. This is for Position number 00095687 at CGPSC (rpm) (department ID #002817), for personnel assigned to the IRR.

Applicant Contract Data Panel:

Note: Be aware that *Contract Data* does not reflect or imply EAD contract information. EAD is a type of Reserve Active Duty, not an enlistment contract.

- Contract Begin Date – Date of the Oath of Office.
- Contract Type – "COM" (Commission).
- Contract Term –Date of 30 years commissioned service or the date of first day of the month following officer's 60th Birthday whichever is first.

Note: All personnel incur an initial 8-year military obligation upon their first military affiliation.

Continued on next page

Accession into the IRR, Continued

Data Entry Notes (cont'd)

Applicant Contract Data Panel (continued from previous page)**:**

- Service Dates – Complete in accordance with Chapter 3 of this guide. For an officer with no prior service, most of the service dates will be the date of rank as listed on the oath of office. This includes the **Pay Base** date. The **Active Duty Base** will the day prior to the DCO class convening (day of travel from home to school). Expected loss date will be the day prior to the officer's 60th birthday. Expected Active Duty Termination date will be blank (set later by EAD orders). The **Effective date for Pay & Allowances** must be the same as the **Contract Begin Date**.

- Employee Classification – If accession and EAD begin dates are the same, set the Employee Classification to "*SELRES*" and set the Reserve/Training Pay Code to "*A*". If the member doesn't report for active duty on the same date as the accession, set the Employee Classification field "*Individual Ready Reserve (IRR)*". Set the Reserve/Training Pay Code to "*P=Awaiting IADT*". Select the appropriate Classification Code describing the officer's military obligation (e.g. "*Inact Du Officer w/in 8 yr obl*" for an officer with no prior, or less then 8 years prior, service).

Hire Applicant Panel:

- All dates will be equal to the date of rank on the Oath of Office.
- **Do not make any adjustments for** "*Delay in Reporting*". **There is no travel or delay associated with this type of accession. The officer's EAD orders will be used to record travel time from home and from the Academy to the first PDS.**
- Be sure to correctly set the codes for "Job Code" and "Pay Grade" on the Job Data page.
- Position and Department entry dates will also be the date of the Oath of Office.

EAD Orders – Assignment Officer Procedure

Introduction

DCOs who are appointed with Reserve Commissions (versus those who appointed with Temporary Regular commissions) receive Extended Active Duty Orders.

Discussion

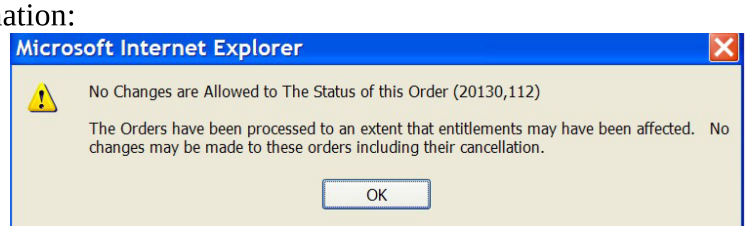
EAD orders in Direct-Access serve two important functions, they:

1. Bring the member onto active duty thereby entitling them to pay and allowances.
2. Provide authorization to make a PCS move from the place from which ordered to active duty to the new permanent duty station.

Previously two sets of orders were required to place the member on EAD and make the PCS transfer. First, a PCS order was issued, and then a separate EAD order was issued. This procedure combines the PCS and EAD orders into a single EAD authorization.

Correcting Existing PCS Orders

This procedure can also be used to correct an existing set of orders. However, corrections must be made before the SPO records the depart/report information. If changes are necessary after the depart/report information is entered by the SPO, the orders must be cancelled and new orders issued. This error will appear if changes are attempted after the SPO has completed the depart/report information:



Procedure

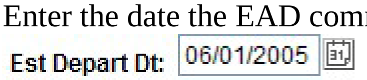
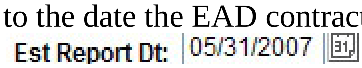
After a decision is made to authorize EAD follow the normal *Make Assignment* (Succession Planning) process in Direct-Access.

- The EAD orders process is essentially the same as the active duty PCS process. There is one small **but important** difference – You must change the Action/Reason code on the orders page to “**RSV**”.

A step-by-step overview of the process begins on the next page.

Continued on next page

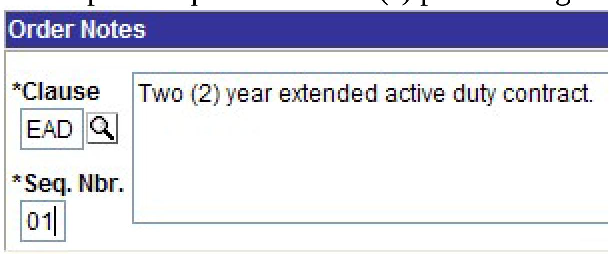
EAD Orders – Assignment Officer Procedure, Continued

Step	Action
1	Create a Succession Plan for the Position the Reservist is going to fill. Note: If correcting a set of orders, access the original succession plan in lieu of creating a new one.
2	Enter the applicant ID or, for current CG member's the employee ID number on the Candidates tab. (Note: If the employee ID field is not active (grayed out), click the Initialize button.)
3	Click the **Orders** button. The orders page will open in a new window.
4	Locate the Action/Reason field. • It will normally default to "**DPT**" as shown below:  • Change the Reason Code to "**RSV**" for Reserve Active Duty Assignment. You can click the lookup icon to search for and select the code or just enter in the space. • When completed the Action / Reason section will look like this: 
5	Enter the date the EAD commences in the **Est. Depart Date** field. 
6	Change the **Est. Report Date** to the date the EAD contract ends. *It will default to 30 days after the depart date.* 
7	Set the ***Status** field to "*Apvd Std*" to approve the orders.

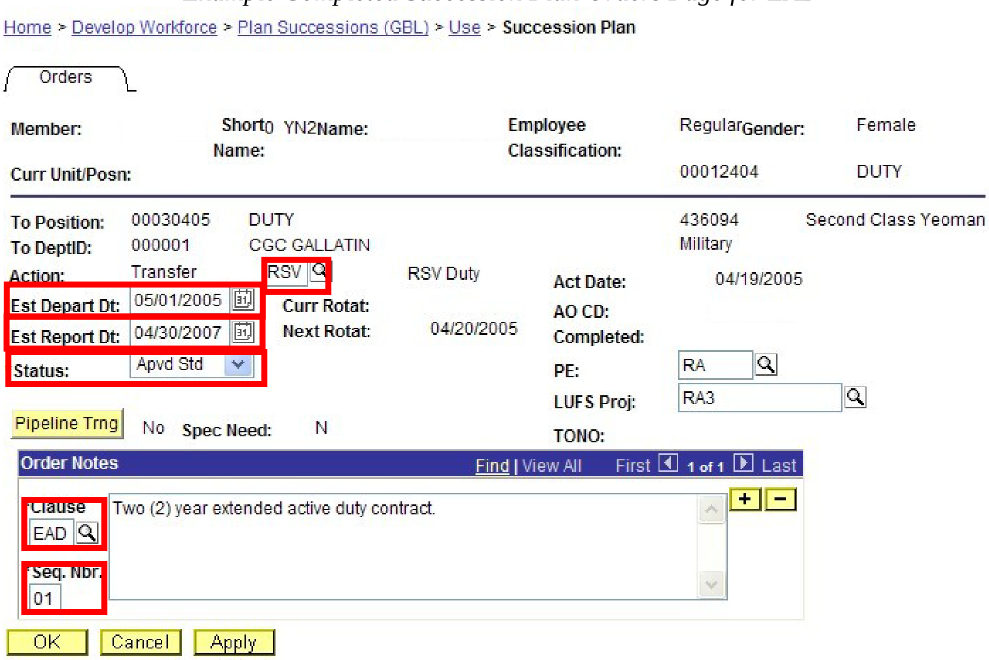
Continued on next page

EAD Orders – Assignment Officer Procedure, Continued

Procedure **(continued)**

Step	Action
8	Add any required order notes (Note: Use “EAD” and “DCO” order notes.) and set the print sequence number(s) per existing EAD and PCS procedures. 
9	Click the OK button.
10	You will be returned to the Succession Plan Page. Click Save to create the orders.

Example Completed Succession Plan Orders Page for EAD



EAD Orders – SPO Procedures

Introduction

This section provides the user at the SPO with the procedure for completing Extended Active Duty Orders.

Discussion

Coast Guard Personnel Command will issue the orders following the procedure in Assignment Processing instructions. The orders will be available via the Airport Terminal and the Reserve Orders Menu. Once properly completed and endorsed the orders will:

- Place the reservist on active duty for a specific period.
- Authorize PCS transfer to the EAD unit.

Reference

The following references provide additional information about PCS entitlements and regulations.

- Personnel Manual, COMDTINST M1000.6 (series), Chap 4
- Joint Federal Travel Regulations, Volume 1
- Personnel and Pay Procedures Manual, PPCINST Ml000.2 (series), Chap 2)

Members Currently on Reserve Active Duty Orders

The SPO for the member's current unit must complete the following actions before finalizing EAD orders for a member who is already on another type of Reserve active duty:

1. Short-term of 139 days ADT or 181 days ADOT or less
   - Sets current Reserve Duty Order **Actual Duty End Date** to the day prior to the EAD begin date.
2. Long-term of 140 days ADT or 181 days ADOT or more.
   - Inputs/approves a RELAD transaction effective the day prior to the EAD begin date.

Continued on next page

EAD – SPO Procedures, Continued

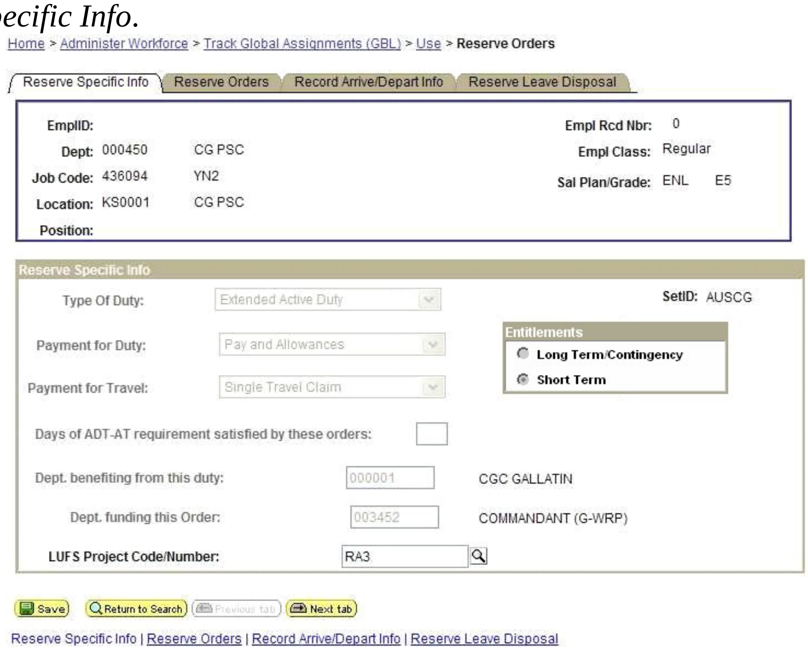
Departing Procedure

The SPO, for the unit the member is departing from, must complete these steps when a member is authorized EAD orders.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Locate the member's orders on the unit's Airport Terminal, or, by using the following menu items:

Home > Administer Workforce > Track Global Assignments (GBL) > Use > Reserve Orders

Enter the member's employee ID number on the Find an Existing Value page and click the search button.

Select the orders from the search results. Note that the Duty Type will be EAD and the status will be "Appvd Standard" indicating that this is new set orders. The newest orders always appear at the top of the search results.
<table>
<tr><th>EmplID</th><th>Empl Rcd Nbr</th><th>Estimated Depart Date</th><th>Estimated Report Date</th><th>Sequence</th><th>Coast Guard Duty Type</th><th>Status</th><th>Short Name</th><th>Em Cl</th></tr>
<tr><td>1070750</td><td>0</td><td>05/01/2005</td><td>04/30/2007</td><td>1043748</td><td>EAD</td><td>Appvd Standard</td><td>YN2</td><td>Re</td></tr>
</table></td></tr>
<tr><td>2</td><td>The Reserve Orders Page will display. There are no editable fields on the first tab -- Reserve Specific Info.

</td></tr>
<tr><td>3</td><td>Click the Reserve Orders tab.</td></tr>
</table>

Continued on next page

EAD – SPO Procedures, Continued

Departing Procedure **(continued)**

Step	Action
4	Review the *Order End Dt* and *Order End Dt* fields in the **Basic Information** block, these fields must match the dates the member's EAD contract begins and ends. It is permissible for the SPO to change/correct these fields. However, changes which differ from the term of the EAD contract must be approved by CGPSC (epm/opm). Order Begin Dt: 05/01/2005 Order End Dt: 04/30/2007
5	Locate the *Authorizing Official (Name, Rate/Rank)* field in the **Basic Information** block and enter the name and title of the person who will be signing the orders.
6	Complete the *Mode of Travel*, *Reimbursable Expenses*, and *Orders Notes* fields per procedures for an Active Duty PCS transfer. Refer to the PCS Order topic in the Direct-Access Online Manual and the references cited at the beginning of this section for guidance. **Warning**: Do not make any entries in the *Authorized Delay* area at this time. This information will be entered on the next tab.
7	Route the order for approval, or approve the order, (see next page) and click save.

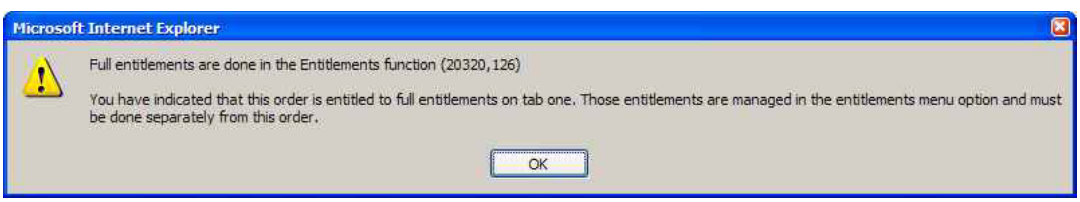
Continued on next page

EAD – SPO Procedures, Continued

Approving EAD Orders

After the initial travel information is entered, a user with the CGHRSUP role must approve the travel order.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Route For Approval button.
<table>
<tr><th>If you are</th><th>Then</th></tr>
<tr><td>The approving official (SPO Supervisor/ CGHRSUP Rule User)</td><td>1. Click the drop-down menu in the Approval status field and select “approved”
2. Click OK.
3. Click Save when returned to the reserve orders page.</td></tr>
<tr><td>Not the approving official</td><td>1. Enter the approving official’s employee ID number in the Forward To field.
2. Click OK.
3. Click Save when returned to the reserve orders page.</td></tr>
</table>

Saving the orders will return several warning and informational messages. Note the reminder that pay entitlements for long-term reserve orders must be administered through the Employee Entitlements module.


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

Continued on next page

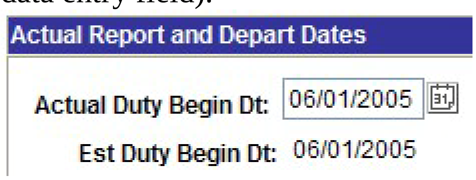
EAD – SPO Procedures, Continued

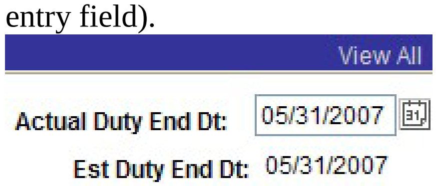
Completing the Record Arrive/ Depart Info Tab

This section must be completed after the orders have been approved and saved.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Path to Home > Administer Workforce > Track Global Assignments (GBL) > Use > Reserve Orders .</td></tr>
<tr><td>2</td><td>Enter the member's employee ID number on the Find an Existing Value page and click the search button.</td></tr>
<tr><td>3</td><td>Select the orders from the search results. Note that the Duty Type will read "EAD" and the Status will show 'Ready for Member to Execute', indicating the orders have been approved, but the Actual Duty dates (Endorsements) have not yet been completed.

</td></tr>
<tr><td>4</td><td>Click on the Record Arrive/Depart Info tab and locate the Actual Report and Depart Dates section.

1. Complete the Actual Duty Begin Dt field using the date the member's EAD contract begins (same as the Est. Duty Begin Dt, which appears below the data entry field).


2. Complete Actual Duty End Dt field using the date the member's EAD contract ends (same as the Est. Duty End Dt, which appears below the data entry field).


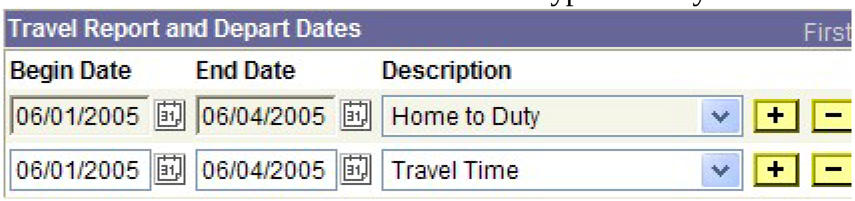
Note: Both the Actual Report and Actual Depart date fields must be completed by the SPO for the unit the member is departing from.</td></tr>
</table>

Continued on next page

EAD – SPO Procedures, Continued

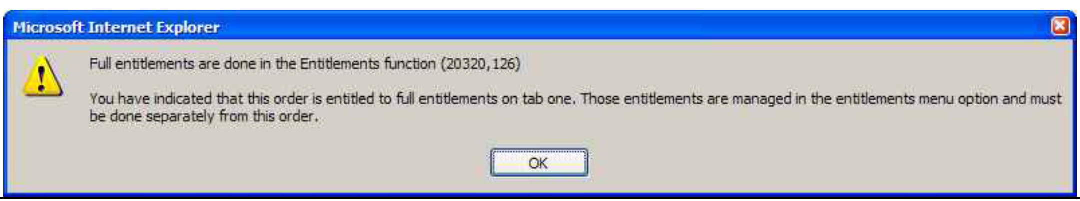
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
Locate the Travel Report and Depart Dates section.

1. The first entry must be a “*Home to Duty*” row. The begin and end dates must span any authorized delay, such as leave, proceed time, and travel time, which will be listed after the Home to Duty row.
2. After entering the Home to Duty row, click the add row button (+) and insert additional rows for each type of delay.



</td></tr>
<tr><td>6</td><td>
When complete click the Save button. This creates the appropriate endorsement on orders transactions.

Reminder: Saving the orders will return several warning and informational messages. Note the reminder that pay entitlements for long-term reserve orders must be administered through the Employee Entitlements module.



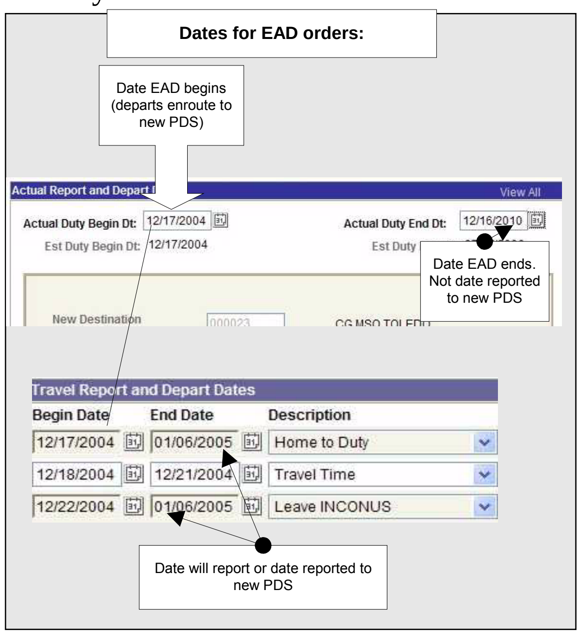
</td></tr>
</table>

Continued on next page

EAD – SPO Procedures, Continued

Reporting Procedure

The SPO for the member's new PDS must complete the following steps after the member reports.

Step	Action
1	Record entitlements (BAH, BAS, CSP, SDAP, etc.) as appropriate for the new PDS, effective the date the member reports.
2	If member reported early, adjust "Home to Duty" and other itinerary dates. 

Pay Entitlements of Newly Hired Officers Attending DCO School

Entitlement	Newly Accessed Officers Attending DCO		While Enroute from Academy New Duty Station after DCO School		Reference
	Mbrs w/o Deps	**Mbrs w/Deps**	**Mbrs w/o Deps**	**Mbrs w/ Deps**	
Basic Pay	Yes @ O-1, O-1E, O-2, O-2E, O3 or O3E, rate as appropriate				Article 1-B-5.j, CG Personnel Manual; Figure 2-2, Rules 3 & 6, CG Pay Manual
BAH	Partial BAH ("D")	BAH-With ("L")@ location of dependents. If dependents reside in a non-BAH eligible locale (e.g., Guam or Puerto Rico), then BAH-In Transit is payable instead of BAH.	Member with prior service - BAH-W/O ("G")@ New London locale. No prior service – BAH-In Transit Rate W/O	BAH-With ("L") @ location paid while at DCO School (location of dependents)	Figure 3-7, Rules 1 & 15, and Figure 3-10, Rules 1 & 19, CG Pay Manual
CONUS COLA Note: Transaction must be submitted even if no $ ent.	No (unless New London, CT becomes an eligible locale)	Yes @ location of the dependents if that is an eligible locale	No (unless New London, CT becomes an eligible locale)	Yes @ location paid while at OCS (location of dependents or permanent unit if eligible locale)	Sections U8002, U8011, & U8012, JFTR
BAS	Officer BAS	Officer BAS	Officer BAS	Officer BAS	Section 3.A.1, Figure 3-2, Rule 10, & Figure 3-4, Rules 1 & 3, CG Pay Manual
FSA-T	No	Yes starts on 30th day.	No	Yes (for travel time only, not for proceed time or leave)	Figure 3-19, Rule 10, CG Pay Manual
Clothing Allowance	$400 Initial (+$200 Additional for Reserve commission)	$400 Initial (+ $200 Additional for Reserve commission)			Sections 3-I and 3-K, CG Pay Manual (exceptions in sections 3.K.2, 3.K.3, 3.K.5)
Career Sea Pay	No	No	No	No	Figure 4-7, Rule 4, CG Pay Manual
Hardship Duty Pay – Location	No	No	No	No	Figure 4-3, Rule 5, CG Pay Manual

DLA, Advance Pay, Proceed Time, & TLE – They are different for people with no break in service.

PPC SPO Manual

Part VIII, Accessions

Chapter 6, OCS Accession/Graduation Processing

Chapter Overview

Introduction

This chapter provides references to procedures for the user at the Academy OCS SPO to complete transactions in Direct Access for an enlisted member who has graduated from OCS and is commissioned as an officer in the U. S. Coast Guard or U. S. Coast Guard Reserve.

In this chapter

The following topics are covered in this chapter.

OCS Accession Processing

Introduction

This section highlights some key points for processing accessions of OCS candidates for Reserve Commissions from civilian status.

Discussion

Applicants accepted for OCS, who will graduate with Reserve Commissions, are often enlisted in the Coast Guard Reserve prior to their class convening (CCLVN) date.

- OCS attendees (from civilian status) are enlisted in the Reserve Component (*See 4.D.1.c, CG Recruiting Manual for enlistment terms and rates*) issued IADT orders to OCS. They are commissioned upon graduation and issued EAD orders to fulfill their active duty service obligation. They remain affiliated with the Reserve Component unless they integrate into the Regular Coast Guard or are discharged upon completion of their initial military service obligation. .

Continued on next page

OCS Accession Processing, Continued

Processing OCS-DEP Accessions

Follow the procedures in Chapter 3 for completing the initial accession. Refer this table to determine the correct dates to use for the various date fields on the Applicant Contract Data pages.

Stage	Event	Event Sets the
1	Recruiter effects enlistment with CGRC authorization IAW 4.D.1.c CG Recruiting Manual. Note: If enlisting prior to the 1st of the month, in which they will depart for OCS, enter a decline of SGLI coverage, this will prevent the member being charged for SGLI while in a DEP status. Remember to start SGLI coverage (and family coverage, if applicable) the date the member start their IADT.	1. **Contract Begin Date**. Use date from block 5 DD-4/1 (Date of Enlistment). 2. **Contract Term** (8 years or 4 years if prior service). 3. **Job Code** 451097/Rate. SAOC (E2) or prior CG rate (non CG prior service members are enlisted as SAOC/E2, ref 1.B.5.J CGPERSMAN) **4. Effective Date for Pay & Allowances** 5. **Military Entry Date** (Date Military Obligation Incurred) and **Date Completed Military Obligation** (8-year span). 6. **Expected Loss Date** (8 or 4 years after date of enlistment) **7. Anniversary Date** **8. Initial Reserve Entry Date** 9. **Employee Classification** (IRR) 10. **TRA/PAY Cat** (P = Awaiting IADT) **11. Active Duty Base Date** **12. Pay Base Date** **13. Date Entered Current Active Duty Period** **14. Job Family Entry Date**
2	Member departs for OCS, normally 1-day prior to CCLVN date.	Reserve Member Status Change (SELRES/Cat-A) Begin date for the IADT orders.

Continued on next page

OCS Accession Processing, Continued

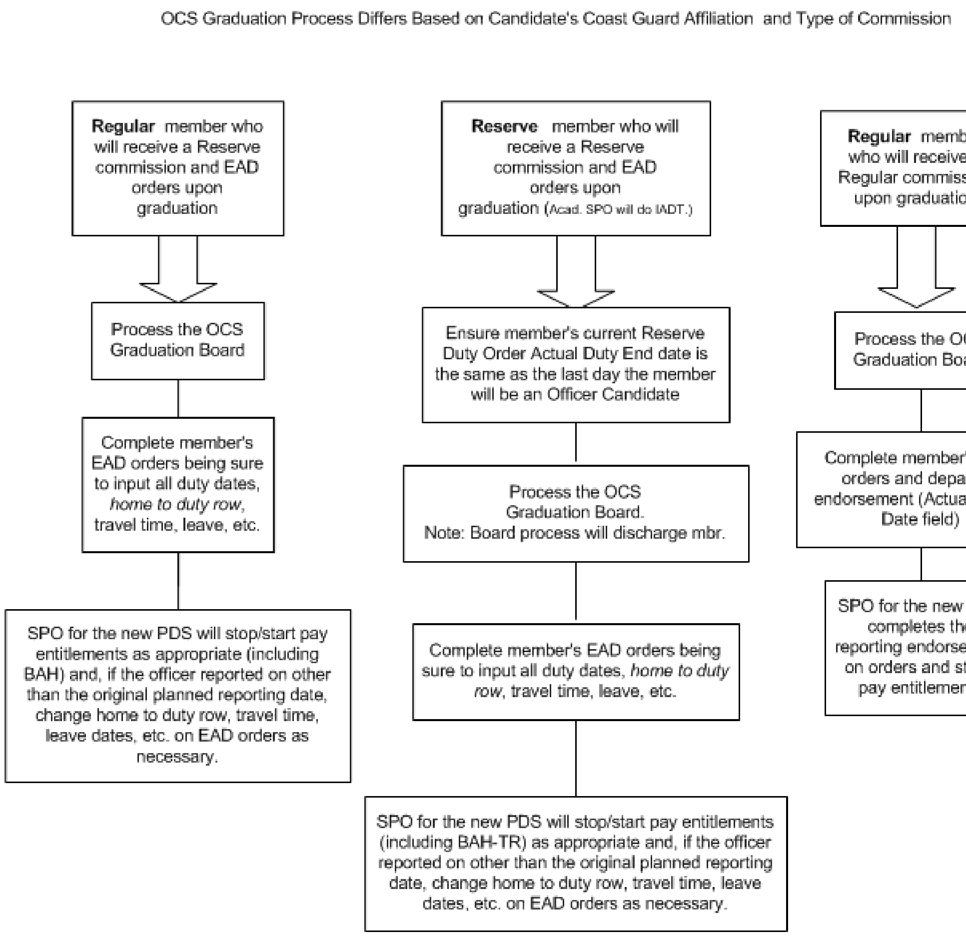
Processing OCS-DEP Accessions (continued)

Stage	Event	Event Sets the
3	Member reports to OCS.	For members without any prior CG service or with prior CG service who were enlisted below paygrade E-5: Advancement to Job Code 451094/OCUI2 (E5). **Note**: There is problem with the way the advancement to OCUI2 (E5) works through JUMPS. If you prepare and approve the accession and the advancement on the same day, the member's accession will reflect E5 not E2 in JUMPS. This is true even if you date the advancement the day after the accession (which is correct, member is paid as SAOCUI while en route to OCS and advanced when class starts). To avoid this problem, please be sure to enter the advancement to OCUI2 one JUMPS update cycle after the accession is approved. A future update to DA and/or JUMPS will correct this problem and this note will be removed.
4	Member Graduates OCS	Follow the procedures beginning on the next page.

Graduation Process Overview

Process

See flowchart below.



Transaction Notes/References

Determining Coast Guard Affiliation

You must know what type of Coast Guard affiliation the Officer Candidate currently has before beginning the OCS graduation process. The affiliation is determined by the member's employee class (empl_class) in Direct-Access. Follow these steps to lookup the employee class:

Step	Action
1	Click on the following menu items: Home > Develop Workforce > Plan Careers > Use > CG Member Info
2	Enter the employee ID and press ***Enter*** or click search.
3	The CG Member Information page will display. The employee class is shown on the Background tab between the Rank and SSN fields. Home > Develop Workforce > Plan Careers > Use > CG Member Info 

View/Change Reserve Order Actual Duty End Date

If the member is a Reservist, ensure the current Reserve Duty Order Actual Duty End date is the same as the last day the member will be an Officer Candidate. The procedures for viewing and changing (if necessary) duty end date are available in the Direct-Access Online Manual.

1. Access the Online Manual at http://www.uscg.mil/ppc/ps/.
2. Click the Reserve Orders book icon in the table of contents.
3. Click the *Amend Active Duty Termination Date for a Reservist topic*.
4. Follow the directions on the page to view a tutorial of the process or to access the online guide.

Continued on next page

Transaction Notes/References, Continued

PCS Transfer Orders for a Regular Officer

Here are the references for issuing, completing and endorsing orders for a Regular officer.

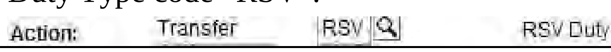
Action	See
Assignment Officer must issue PCS orders.	The Make Assignment topic in the Direct-Access Online Manual. 1. Access the Online Manual at http://www.uscg.mil/ppc/ps/. 2. Click the Assignment Processing book icon in the table of contents. 3. Click the *Make Assignment* topic.
SPO must complete the PCS orders tab and the Depart / Report Member Info. tab	The PCS Transfer topic in the Direct-Access Online Manual for guidance. 1. Access the Online Manual at http://www.uscg.mil/ppc/ps/. 2. Click the SPO Transactions book icon in the table of contents. 3. Click PCS Orders book icon. 4. Click the *PCS Travel Order* topic for information on completing the PCS Orders tab. 5. Click on the Click the PCS Departing Endorsement on Orders topic for information on completing the Depart / Report Member Info tab. **Depart/Report Member Tab (Endorsements)** — **Completed by** Actual Depart Date — Academy SPO Actual Report Date — SPO for the member's new PDS

Continued on next page

Transaction Notes/References, Continued

PCS Transfer / EAD Orders for a Reserve Officer (Including a Regular Member who Graduates with a Reserve Commission)

Here are the references for issuing, completing and endorsing orders for a Reserve officer who will be performing Extended Active Duty following graduation from OCS.

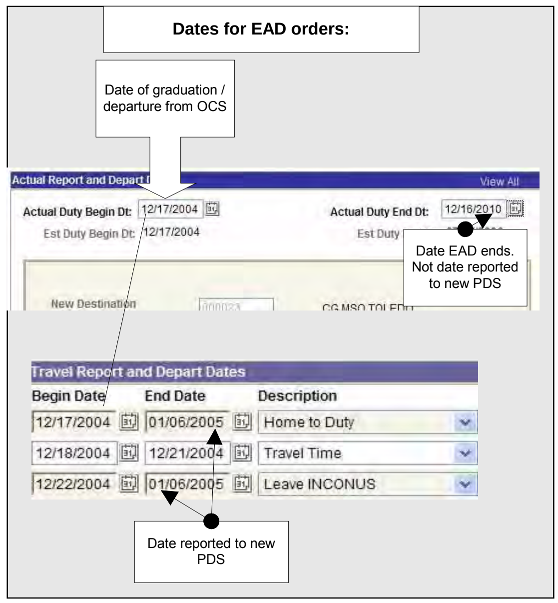
<table>
<tr><th>Action</th><th>See</th></tr>
<tr><td>Assignment Officer must issue PCS-EAD orders</td><td>The Make Assignment topic in the Direct-Access Online Manual.
1. Access the Online Manual at http://www.uscg.mil/ppc/ps/.
2. Click the Assignment Processing book icon in the table of contents.
3. Click the Make Assignment topic.
Note: The Action / Reason section must be completed with the Reserve Duty Type code "RSV".
</td></tr>
<tr><td>1. Academy SPO must complete the Reserve Specific Info. and Reserve Orders tabs.
2. Academy SPO must complete the Record Arrive / Depart Info tab AFTER the Board process is complete.</td><td>The EAD Orders topic in the Direct-Access Online Manual.
1. Access the Online Manual at http://www.uscg.mil/ppc/ps/.
2. Click the Reserve Orders book icon in the table of contents.
3. Click the Extended Active Duty Orders topic.
<table>
<tr><th>Record Arrive/Depart Info Tab (Endorsements)</th><th>Completed by</th><th>Use</th></tr>
<tr><td>Actual Duty Begin Date</td><td>Academy SPO</td><td>Date of graduation/departure from OCS (EAD start date)</td></tr>
<tr><td>Actual Duty End Date</td><td>Academy SPO</td><td>Date EAD ends.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Transaction Notes/References, Continued

Early Reporting of Reserve Officers

If a reserve officer reports to his/her new duty station earlier than the end date of the "***Home to Duty***" row as recorded by Academy SPO on the ***Record Arrive/Depart Info*** tab of the EAD orders, the officer's new SPO shall record the early arrival by adjusting the dates. The end date of the Home to Duty row must be changed to reflect the officer's reporting date and the leave, travel time, and other delay enroute dates adjusted accordingly.



If the officer has no dependents, the officer's new SPO shall also adjust the officers BAH w/o deps entitlement while enroute from the Academy to the new duty station (see the Pay Entitlements section on the following page).

Board Process

Boards and Panels are convened to process officer appointments, promotion, retention and selection for advanced training. The PeopleSoft Career Management module is used to setup and manage Boards. Refer to the Boards topic in the Direct-Access Online Manual for guidance.

1. Access the Online Manual at http://www.uscg.mil/ppc/ps/.
2. Click the Career Management book icon in the table of contents.
3. Click the Boards topic.

Note: The Board Process must be completed before orders are endorsed.

Continued on next page

Transaction Notes/References, Continued

Pay Entitlements

The chart on the following page summarizes pay entitlements of members while attending OCS and enroute to their new PDS.

Pay Entitlements of Members Attending OCS

(other than Reservists on short-term active duty for ROCI)

Entitlement	Newly Accessed Members Attending OCS		Current USCG or USCGR Members Ordered to OCS		While Enroute from OCS to New Duty Station after OCS		Reference
	Mbrs w/o Deps	**Mbrs w/Deps**	**Mbrs w/o Deps**	**Mbrs w/ Deps**	**Mbrs w/o Deps**	**Mbrs w/ Deps**	
Basic Pay	Yes (as E-2)	Yes (as E-2)	Yes @ pay grade prior to OCS; if < E-5 prior to OCS, then receive E-5 rate at OCS.	Yes @ pay grade prior to OCS; if < E-5 prior to OCS, then receive E-5 rate at OCS.	Yes @ O-1, O-1E, O-2, or O-2E rate as appropriate	Yes @ O-1, O-1E, O-2, or O-2E rate as appropriate	Article 1-B-5.j, CG Personnel Manual; Figure 2-2, Rules 3 & 6, CG Pay Manual
BAH	Partial BAHor (for Reserve on IADT) BAH W/O @ location of permanent residence location at the time ordered to active duty provided member maintains a residence and continues to be responsible for rent or owns the residence	BAH @ location of dependents. If dependents reside in a non-BAH eligible locale (e.g., Guam or Puerto Rico), then BAH-L is payable using the zip code for the training center	Partial BAH	BAH @ location of permanent unit prior to OCS (unless dependents reside in government quarters).	See SPO Manual, Vol II, Chapter 10 (BAH), **Table 1: BAH-PCS Entitlements for Active Duty Members Without Dependents**	See SPO Manual, Vol II, Chapter 10 (BAH), **Table 2: BAH-PCS Entitlements for Active Duty Members With Dependents**	Figure 3-7, Rules 1 & 15, and Figure 3-10, Rules 1 & 19, CG Pay Manual
CONUS COLA	No (unless New London, CT becomes an eligible locale)	Yes @ location of the dependents if that is an eligible locale	No (unless New London, CT becomes an eligible locale)	Yes @ location of permanent unit (prior to OCS) if that is an eligible locale	No (unless New London, CT becomes an eligible locale)	Yes @ location paid while at OCS (location of dependents or permanent unit if eligible locale)	Sections U8002, U8011, & U8012, JFTR
BAS	No	No	Enlisted BAS minus Discount Meal Rate	Enlisted BAS minus Discount Meal Rate	Officer BAS	Officer BAS	Section 3.A.1, Figure 3-2, Rule 10, & Figure 3-4, Rules 1 & 3, CG Pay Manual
FSA-T	No	Yes	No	Yes	No	Yes (for travel time only, not for proceed time or leave)	Figure 3-19, Rule 10, CG Pay Manual
Clothing Allowance	No	No	Yes (BMA or SMA)	Yes (BMA or SMA)	$400 Initial (+$200 Additional if Reserve commission)	$400 Initial (+ $200 Additional if Reserve commission)	Sections 3-I and 3-K, CG Pay Manual (exceptions in sections 3.K.2, 3.K.3, 3.K.5)
Career Sea Pay	No	No	No	Yes (for first 30 days of TDY if permanent unit prior to OCS was a vessel)	No	No	Figure 4-7, Rule 4, CG Pay Manual
Hardship Duty Pay – Location	No	No	No	Yes (if permanent unit prior to OCS was an HDP-L eligible unit)	No	No	Figure 4-3, Rule 5, CG Pay Manual

PPC SPO Manual

Part VIII, Accessions

Chapter 7, Academy Graduation Processing

Chapter Overview

Introduction

This section will guide you through the process of creating and processing Academy graduation boards. For general information on using the "Maintain Boards" page, you should review the boards topic in the Direct Access Online Help at: http://www.uscg.mil/ppc/ps/career_management/boards/overview.htm.

Responsibility

This process is completed by the Academy SPO only.

User Roles

Your DA user account will need the following roles added in order to complete this procedure:

Role	Description
PROM	Promotion
CGCRMGBD	Career Management Boards

Submit a DA User Access form (CG-7421B) to PPC Customer Care to have the above roles added to your account.

Discussion

This process will create the necessary JUMPS transactions to establish the graduate as an officer in the Coast Guard. The Applicant/Hire processes are not necessary when this process is used. However, you should ensure that an Employee Tax Data and Payment Option Election are submitted for each graduate. See chapter 4 for procedures.

In this chapter

The following topic is covered in this chapter.

Academy Graduation Boards

Before you begin

If possible, have the Board Type Code. Academy boards will be created with the code ACAD. 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.

Procedure

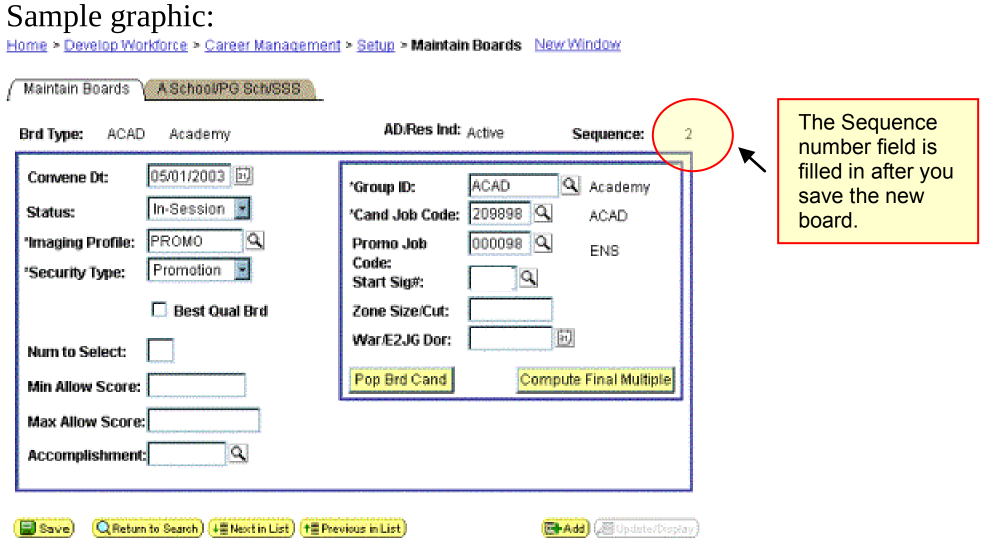
Follow these steps to process an Academy Graduation board.

Step	Description
1	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 '***%ACAD%***' then press ***Search***. Select 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. 

Continued on next page

Academy Graduation Boards, Continued

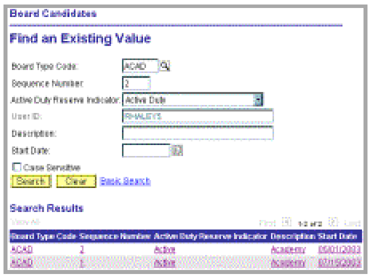
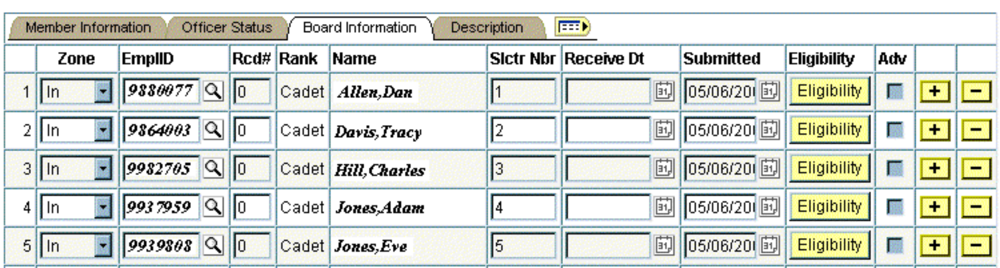
Procedure

Step	Description
2	On the "Maintain Boards" page, complete the fields as follows: Enter the Graduation Date of the Academy Class. 1. Set the Status to ***'In-Session'***. 2. Select ***'PROMO'*** for the Imaging Profile. 3. Select ***'Promotion'*** for the Security Type 4. Select ***'ACAD'*** for the Group ID. 5. The Cand Job Code should be the *primary* jobcode of the members who are graduating from the academy (The most common value will be: 209898 ACAD). If graduating personnel have multiple jobcodes for that school session, you should select the jobcode held by the majority of the class. 6. The Promo Jobcode should be the jobcode that class will be advanced to. Use the magnifying glass to look-up the appropriate jobcode. (The most common value will be: 000098 ENS.) 7. Leave the Start Sig# blank. This number does not pertain to Academy advancements. Sample graphic:  Press the ***Save*** button. Note the Sequence number in the upper right-hand corner of the page. This is your ID number for this board.

Continued on next page

Academy Graduation Boards, Continued

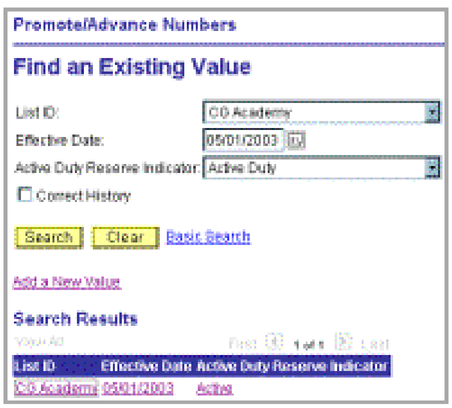
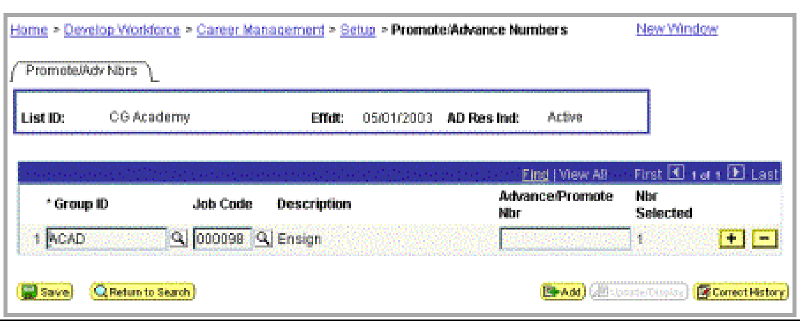
Procedure

Step	Action
3	To add the board candidates, select from the home menu bar ***Develop Workforce>, Career Management>, Use>,*** and ***Board Candidates***. Look up the board that was created in Step 2. Sample lookup:  Add the candidates.  **The candidates are initially populated and sequenced in alphabetical order**. Therefore, <u>press the ***Board Information*** tab and use this page to sequence the candidates</u> in precedence order based on their class rank for processing/signal number assignment.  This ordering is established through manipulating the Slctr Nbr (selector number) field. Cadet administration will also have to manually manipulate any cadets who will not be graduating and/or will be graduating late.

Continued on next page

Academy Graduation Boards, Continued

Procedure (cont'd)

Step	Action
3	*(continued from previous page)* To manually add candidates from the list, 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.
4	Select from the home menu bar ***Develop Workforce>, Career Management>, Setup>,*** and ***Promote/Advance Numbers***. Select the List ID (***CG Academy***), Effective Date (***05/01/2003***), 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)  On the "Promote/Advance Numbers" page, enter the Group ID of ***"ACAD"*** and the Job Code of ***"000098".*** Press the ***Save*** button. **It is not necessary to add a number in the Advance/Promote Number field (**This field is for enlisted advancements from advancement lists. Refer to the instructions for the "Board Information" tab, in Step 2 above, if you need to set the rank order of candidates**)**. All the candidates on the board will populate the "Post Board Activities" page (the next step). 

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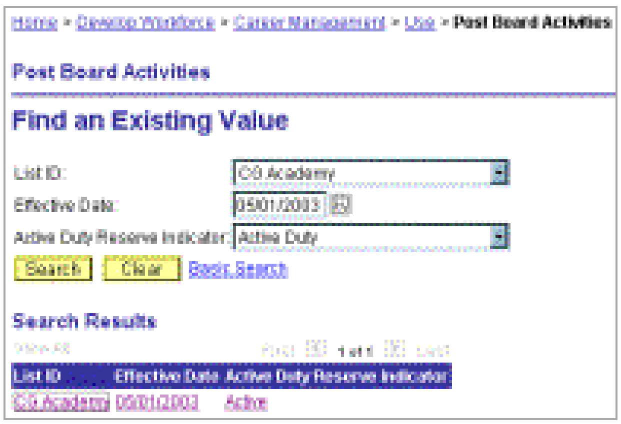
Academy Graduation Boards, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

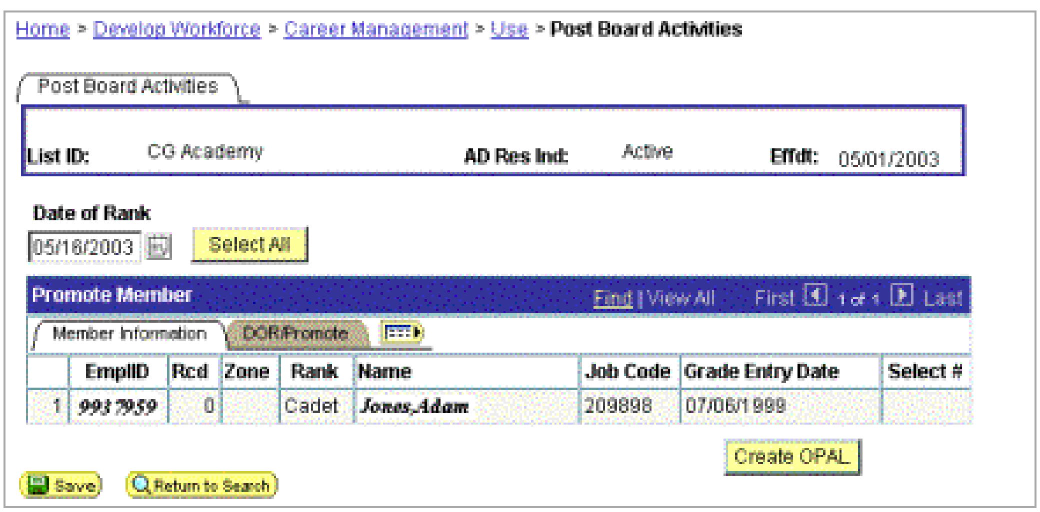
Select from the home menu bar ***Develop Workforce*>, *Career Management*>, *Use*>,** and ***Post Board Activities***. Select the List ID (***CG Academy***), Effective Date (***05/01/2003***), and the Active Duty Reserve Indicator ("***Active Duty***" or "Reserve – Active Component," as appropriate). 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:



</td></tr>
<tr><td>6</td><td>

This takes you to the "Post Board Activities" page. This pulls all selected candidates from the board session.



Press the ***DOR/Promote*** tab. Enter the Date of Rank (DOR) for the promotion and press the ***Select All*** button. This will populate the Rank/Contract date field.

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

Continued on next page

Academy Graduation Boards, Continued

Procedure (cont'd)

Step	Action
7	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. 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.
8	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.

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PPC SPO Manual

Part VIII, Accessions

Chapter 8, Component Changes

Chapter Overview

Introduction

The chapter provides the procedures for separating an enlisted member from active duty and enlisting them in the Reserve Component with no break in service. This chapter also provides the procedures for separating regular officers from active duty and accessing them into the Coast Guard Reserve.

In this chapter

The following topics are covered in this chapter.

Topic	See Section
Discharge to Immediate Enlistment	VIII-8-A
Regular to Reserve Officer Commission	VIII-8-B

Section A, Discharge to Immediate Enlistment

Section Overview

Introduction

This section provides the procedure for separating a member from one service component (Reserve or Regular) and enlisting them in the other with no break in service.

In this chapter

The following topics are covered in this chapter

Warning

Do not use this procedure for a member who is reenlisting in the same service component. See the Reenlistment Contract topic in the Direct Access Online Help for the procedure for these members.

Discharge Procedure

Introduction

A component change is preceded by a discharge, effective the day before the accession.

Procedure

Start Internet Explorer, sign 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
<u>Home</u> > <u>Administer Workforce</u> > <u>Administer Workforce (GBL)</u> > <u>Use</u> > Separations

Enter the member's employee ID number in the EmplID field 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. 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>2</td><td>The Separations component will open.
Click the (add a new row icon) to insert a new blank separation if necessary.
<table>
<tr><th>Field</th><th>Entry</th></tr>
<tr><td>Type</td><td>A - Discharge</td></tr>
<tr><td>Termination Date</td><td>Date. Must be the day before the date of (new) enlistment.</td></tr>
<tr><td>SPD</td><td>Separation Program Designator Code. KHC - Immediate Enlistment or reenlistment is used in this example. Check the SPD Code Handbook for a complete listing of codes and their correct usage.</td></tr>
<tr><td>Reenlistment Eligibility Code</td><td>RE1</td></tr>
<tr><td>Reason</td><td>Convenience of the Government</td></tr>
<tr><td>Type</td><td>Honorable</td></tr>
<tr><td>Status</td><td>"Rcmed Reenl Change Component" - Recommend for reenlistment or change of service component.</td></tr>
</table></td></tr>
</table>

Continued on next page

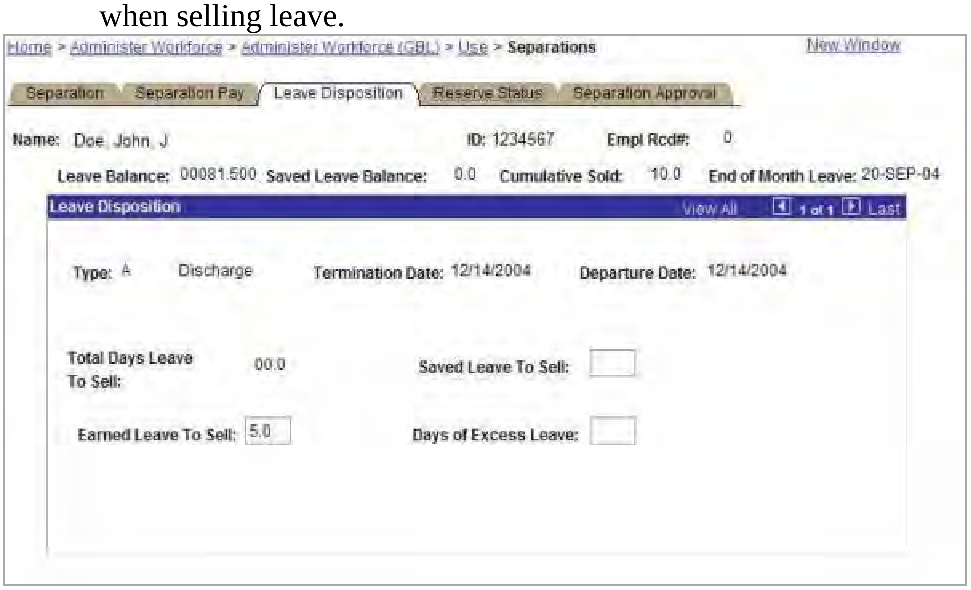
Discharge Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>


</td></tr>
<tr><td>3</td><td>
Click the Leave Disposition Tab.

- Enter any earned or saved leave to be sold or number of excess days to be charged.
Note: Reserve members being discharged from a recall to active duty for a contingency operation are not subject to the 60-day career maximum limit when selling leave.

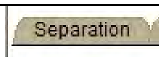
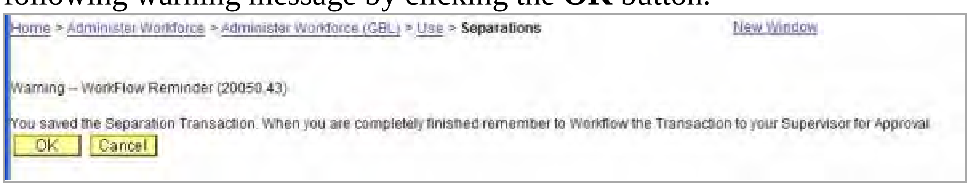
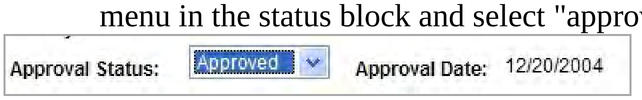


</td></tr>
</table>

Continued on next page

Discharge Procedure, Continued

Procedure (continued)

Step	Action
4	Click the  tab. Locate the links section at the bottom of the page:  • Select the Orders link.
5	The Separation travel order will open in a new window. Normally, no action is required. However, the system may not permit you to save the separation transaction without first viewing the separation travel order. Close the travel order window to continue.
6	Click the DD244 link. The DD214 worksheet will open in a new window. Complete the worksheet (see the DD-214 instructions for details), save it and close the window.
7	Return to the separation window and click the  button. Acknowledge the following warning message by clicking the **OK** button. 
8	Click the  tab. • If you are a CGHRSUP (**SPO Supervisor**) role user, click the drop-down menu in the status block and select "approved"  • If you are not a CGHRSUP (SPO Supervisor) role user, enter the employee ID of the approving official in the route to block. Note: The SPO supervisor must approve and save the separation transaction before the accession can be initiated.
9	Return to the separation window and click the  button. Acknowledge any warning messages by clicking the OK button.

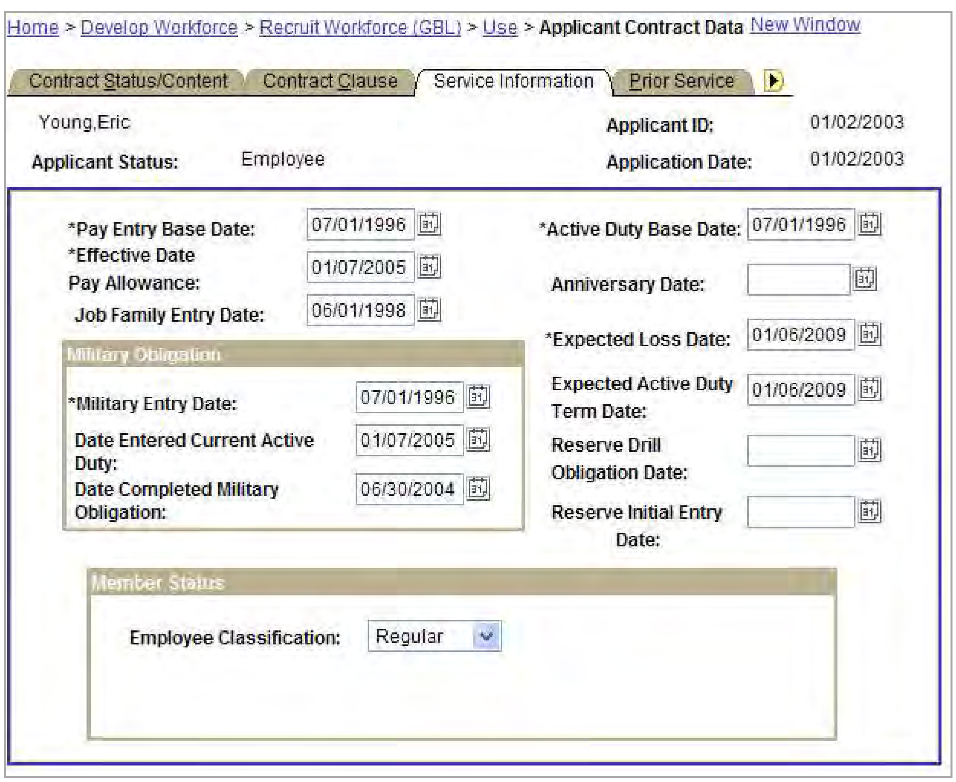
Accession Procedure

Introduction

This section supplements the procedures in Chapter 2 and 3 for completing the accession of a member who is changing components or being commissioned outside of the OCS or Academy Board processes.

Procedure

Follow these steps to complete the accession.

Step	Action
1	Complete the steps in **Chapter 2, Pre-Accession Processes,** to add the member as an applicant and in **Chapter 3, Hire Processing**, to complete the enlistment contract (*Contract Data page*).
2	Ensure the effective date entered for the accession is the day immediately following the effective date of the member's discharge.
3	Also, remember to correctly set the member's pay base date, active duty base date, job family entry data, and other date fields on the Service Information tab of the Contract Data page. 

Continued on next page

Accession Procedure, Continued

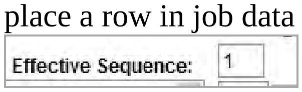
Procedure (continued)

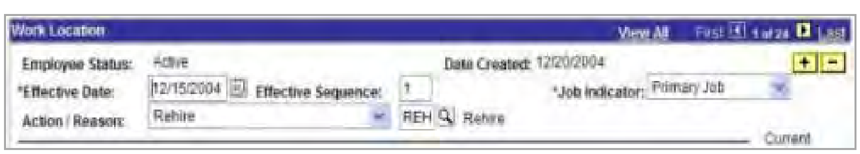
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Military Service End Date field on the Prior Service tab of the Contract Data page should be the date immediately before the effective date the accession.

</td></tr>
<tr><td>5</td><td>Complete the steps in the Hire Applicant topic (Chapter 3, page 36). Again, ensure the effective date entered is the day immediately following the effective date of the member's discharge.

Pay particular attention to the requirement in Step 5.D of the Hire Applicant topic to change the Effective Sequence number of the Job Data entry:

- If this is a rehire immediately following a discharge (e. g. Member discharged from Reserve and Enlists in Regular CG next day), change the **Effective Sequence** number field to 1. The discharge transaction will place a row in job data with the same effective date.



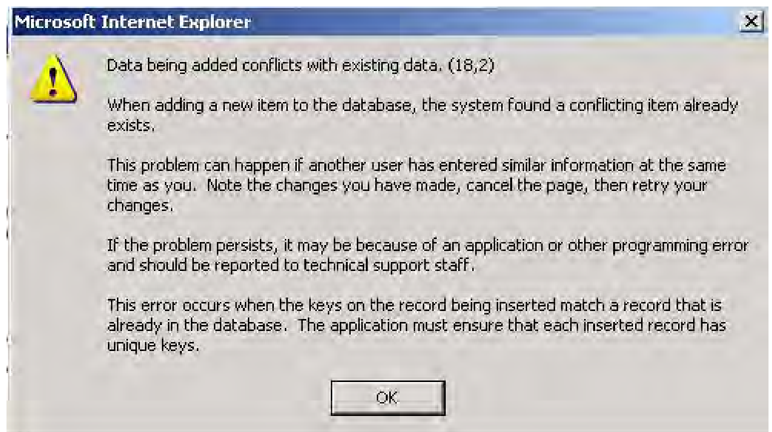
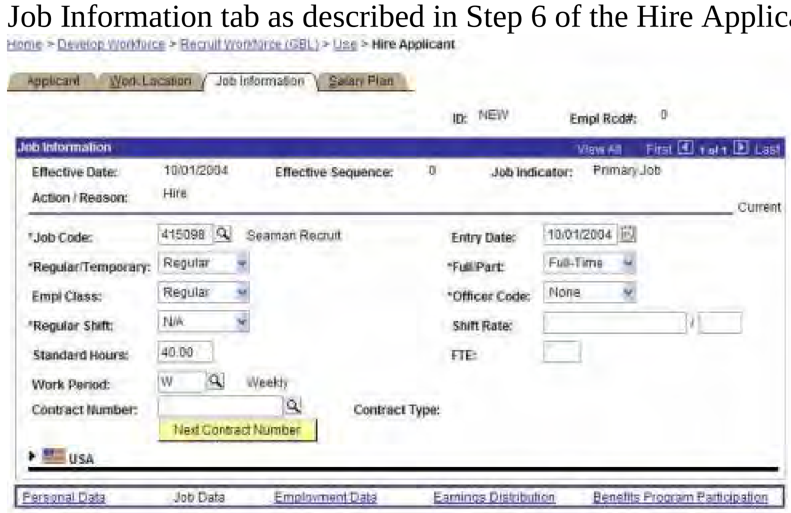


</td></tr>
</table>

Continued on next page

Accession Procedure, Continued

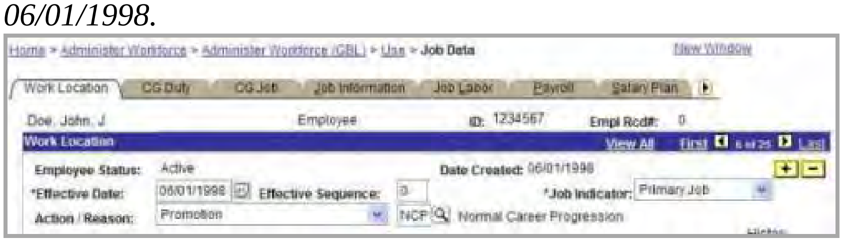
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Failure to adjust the Effective Sequence number will result in this error when attempting the save the accession:

</td></tr>
<tr><td>6</td><td>Also, be sure to correctly enter the member's effective date of pay grade on the Job Information tab as described in Step 6 of the Hire Applicant procedure.

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

Continued on next page

Accession Procedure, Continued

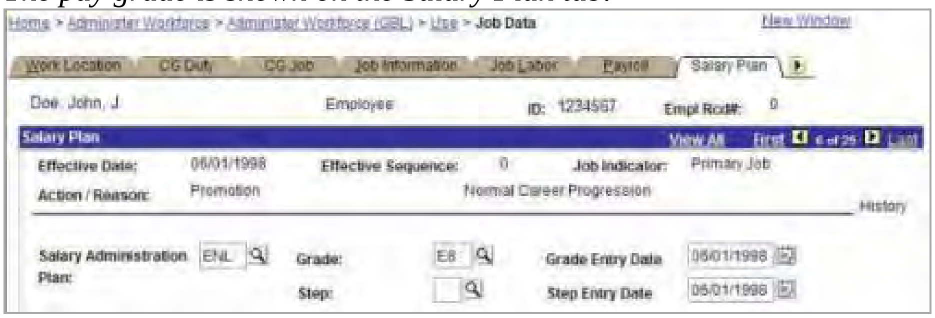
Procedure (continued)

Step	Action
7	There are two fields on the Job Information tab that will need to be changed from their default values depending on the type of accession: The "**Job Code**" is used to set the member's rate/rank & paygrade. It will default to the rate/rank associated with the Position ID/Job Requisition number entered on the Requisition Tab of the Applicant Data page. This field will need to be changed to reflect the member's rate/rank at the time of accession (Example: Member is authorized enlistment as a SN/E3 vice SR/E1 or a reservist enlisting under the RX program as a PS2 but assigned to an unbudgeted position, which are all SN/E3 billets). The **Entry Date** is used to set the member's effective date of pay grade. The Entry Date defaults to the effective date for the accession as entered in Step 5 above. If this is a rehire with no break in service (e.g. Discharge to Immediate Enlistment) you must change the Entry Date to the effective date of advancement to present pay grade for the rating in which presently serving. This can be determined by accessing the member's job data (Administer Workforce > Administer Workforce (GBL) > Use > Job Data) in "Include History" mode and locating the **effective date** of the most recent row with the **Action / Reason** of "**Promotion / NCP - Normal Career Progressio**n" *In the example below, the effective date of the member's advancement was 06/01/1998.* 

Continued on next page

Accession Procedure, Continued

Procedure (continued)

Step	Action
7	*The pay grade is shown on the Salary Plan tab.* 
8	If the member is transitioning from the Reserve Component to the Active Component, after saving the Hire Applicant page, go to Employee Entitlements and start BAH, BAS, Career Sea Pay and other pay and allowances the member is entitled to.

Section B, Regular to Reserve Officer Commission

Section Overview

Introduction

This section provides the procedure for separating an officer from the Regular Component and accessing them into the Reserve Component with no break in service.

Responsibility

The SPO for the officer's current [active duty] unit completes this process.

In this chapter

The following topics are covered in this chapter

Key points

For the SPO, the Regular to Reserve Officer Commission process has four stages. Each stage must be completed in order:

Stage	Description
1	Statement of Intent transaction, 45 days prior the discharge
2	The Discharge, effective the last day of active duty
3	The Accession, effective the day after the last day of active duty
4	Reserve PCS Orders. **Never** approve/endorse the order, assigning the member to a reserve position, before completing the discharge and accession.

Discharge Procedure

Introduction

A component change is preceded by a discharge, **effective the day before the accession**. The type of separation, termination date, separation program designator (SPD) code and separation pay type are entered by Coast Guard Personnel Command (opm-1) when the separation is authorized.

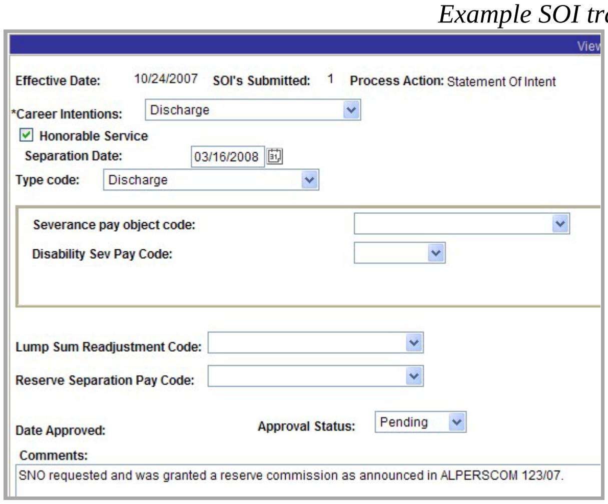
Detailed guidance

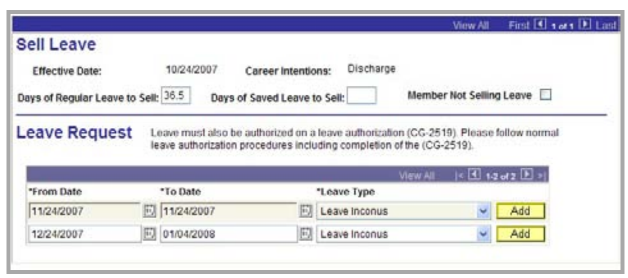
This section only summarizes some of the key steps the SPO needs to complete in order to process the separation of an officer who will be immediately accessed into the Coast Guard Reserve. SPOs should use the information in this section along with the detailed guidance in Part VI, Separations, of this manual.

Units, members and SPOs must also refer to Chapter 3-B of the Personnel and Pay Procedures Manual, PPCINST M1000.6(series) for separation process timelines and checklists.

Reminder: A *Discharge-type* Statement of Intent (SOI) transaction must be submitted by the SPO 45 days prior to the separation effective date. Effective 26 November 2006 severance pay for officers separating due to non-selection was discontinued. Officers may receive separation pay instead. Leave the fields pertaining to severance pay on the SOI blank.

Example SOI transaction screens:

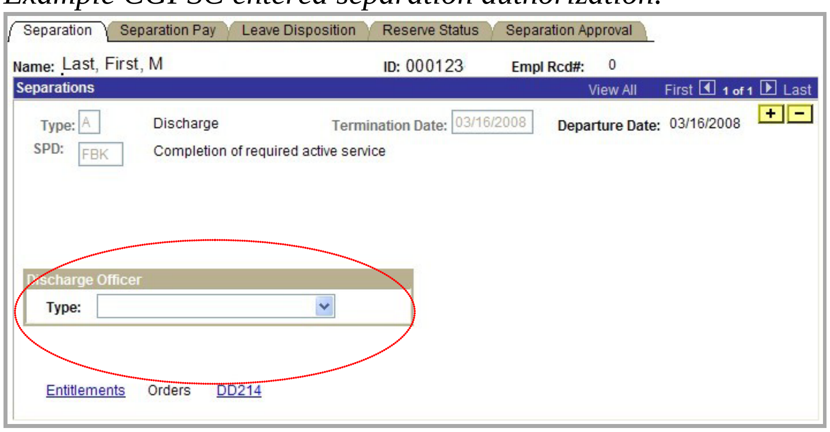
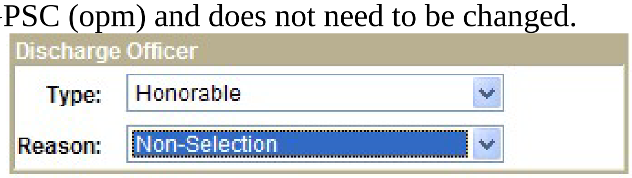




Continued on next page

Discharge Procedure, Continued

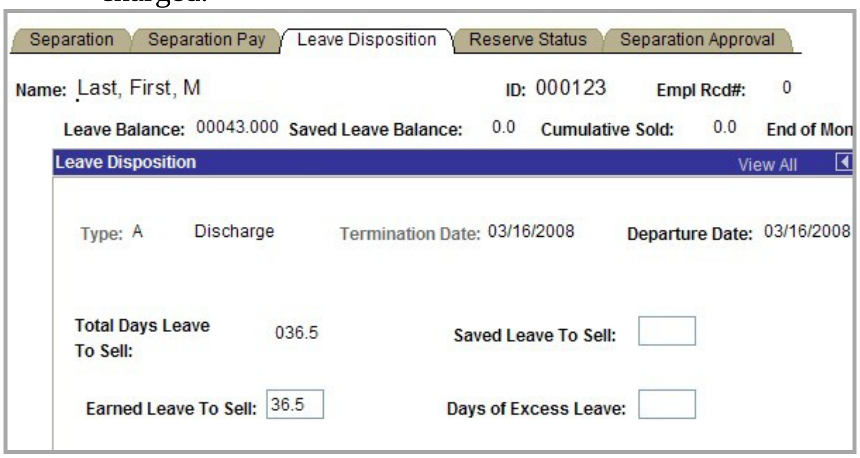
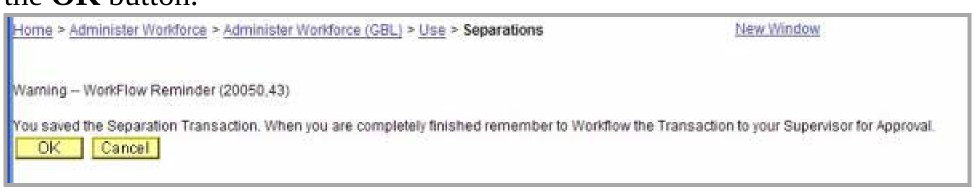
Procedure Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order **<u>Administer Workforce</u>** > **<u>Administer Workforce (GBL)</u>** > **<u>Use</u>** > **Separations** Enter the officer's employee ID number in the EmplID field 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. 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 Separations component will open. The CGPSC (opm-1) discharge authorization should already be present in the system. If the page is blank (new blank row with the current date or an old separation appears, contact CGPSC (opm-1) for assistance). *Example CGPSC entered separation authorization:*  If it is blank, select the **Type** and **Reason** from the *Discharge Officer* drop-down menu. Note: In some cases (officer resignations) this field is completed by CGPSC (opm) and does not need to be changed. 

Continued on next page

Discharge Procedure, Continued

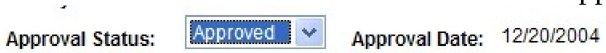
Procedure (continued)

Step	Action
3	Click the Leave Disposition Tab. • Enter any earned or saved leave to be sold or number of excess days to be charged. 
4	Click the  button. Acknowledge the following warning message by clicking the **OK** button. 
5	Click the  tab. Locate the links section at the bottom of the page: Entitlements Orders DD214 • Select the Orders link.
6	The Separation travel order will open in a new window. Normally, no action is required. However, the system may not permit you to save the separation transaction without first viewing the separation travel order. Close the travel order window to continue.
7	Click the DD244 link. The DD214 worksheet will open in a new window. Complete the worksheet (see the DD-214 instructions, in Part VI, Separations, of this manual for details), save it and close the window.

Continued on next page

Discharge Procedure, Continued

Procedure (continued)

Step	Action
8	Return to the separation window and click the  button. Acknowledge the following warning message by clicking the **OK** button. 
9	Click the  tab. • If you are a CGHRSUP (**SPO Supervisor**) role user, click the drop-down menu in the status block and select "approved"  **Note**: The separation cannot be approved more than 14 days prior to the effective date of the separation. • If you are not a CGHRSUP (SPO Supervisor) role user, enter the employee ID of the approving official in the route to block. **Note**: The SPO supervisor must approve and save the separation transaction before the "Hire Applicant" portion of the accession can be completed. However, the other steps in the accession process may be entered with the separation still in a "Pending" status.
10	Click the  button. If the approval status was not set to "approved" acknowledge any warning messages by clicking the OK button. Do not forget to return to the Separations Component and change the status to *Approved* prior to the separation effective date.

Accession Procedure

Introduction

This section supplements the procedures in Chapters 2 and 3 for completing the accession of an officer who is changing from the Regular to the Reserve Component.

Procedure

Follow these steps to complete the accession.

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

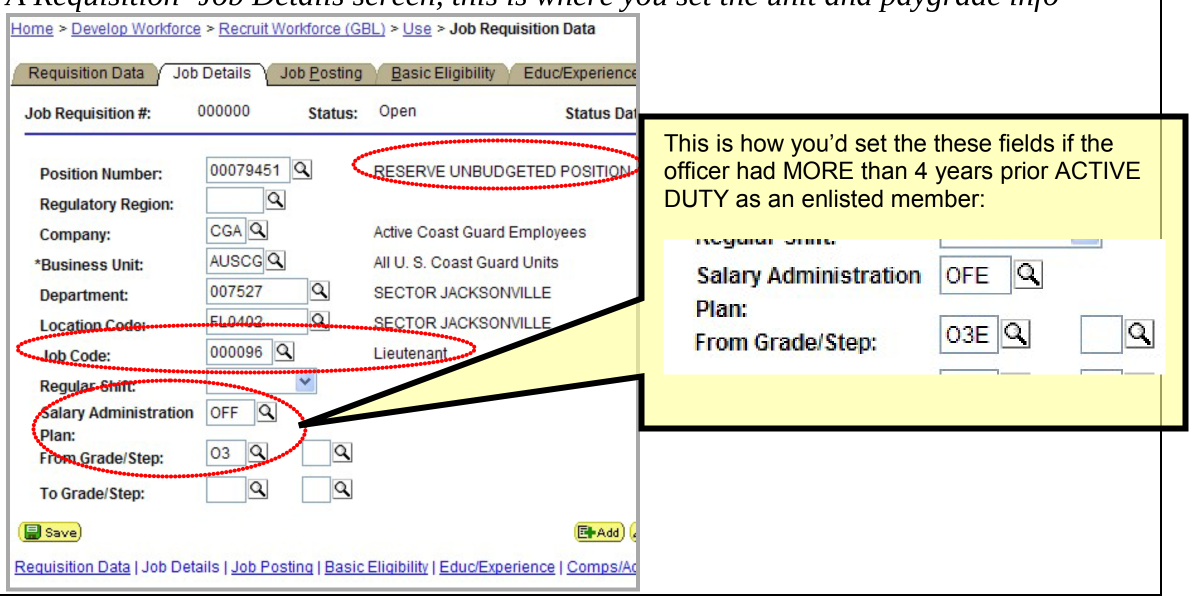
Create a "**Job Requisition**" number.

- If necessary, contact CGPSC (arl-pf-cgpsc-rpm-query@uscg.mil) for the unit where the officer will be assigned to drill and obtain the Position number. If the specific Position number isn't available the generic "Unbudgeted Reserve Position Number" at the unit can be used. PSC (rpm-2) can then issue a Reserve PCS Order (IAW the procedures in Part VIII, Reserve Unique Transactions, of this manual.

Warning: Do not approve/endorse the Reserve PCS before completing the discharge and accession stages of this process.

- The process for creating the "**Job Requisition**" number can be found in Chapter 2-A of this Part. Be sure to follow the guidance on page 2-A-7, and create the requisition with the Rank and Grade for the officer's reserve appointment. This will save you the trouble of changing it during the Hire Applicant process.

A Requisition- Job Details screen, this is where you set the unit and paygrade info

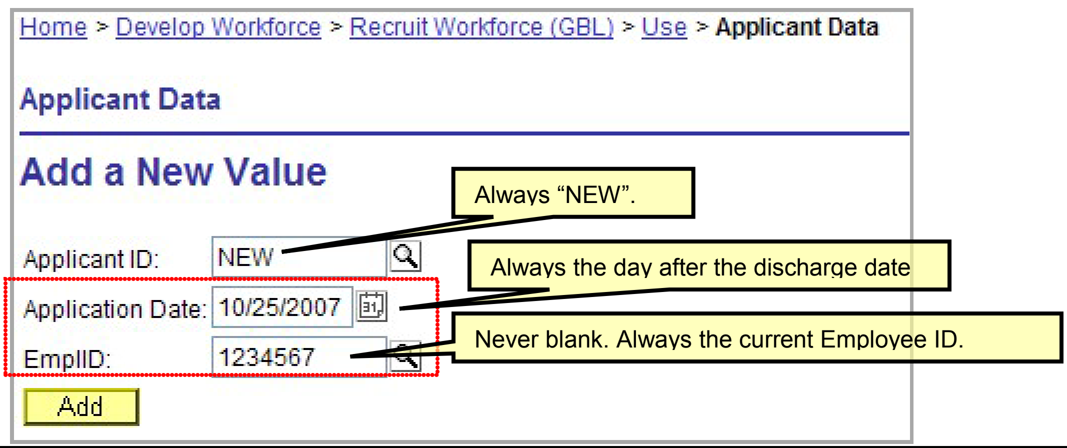


</td></tr>
</table>

Continued on next page

Accession Procedure, Continued

Procedure (continued)

Step	Action
2	Generate a <u>**new Applicant ID number**</u> for this accession. • The process for generating an applicant ID number is provided in Chapter 2-B of this guide. • The "**Application Date**" should be the same as the accession date, which is one day after the last day of active duty. • Be sure to associate officer's employee ID with the applicant ID by entering the employee ID before clicking the "Add" button. 
3	Complete the Applicant Data Page (it appears right after you click the Add button to generate the Applicant ID. Follow the procedures beginning on page 2-B-6 of this guide. Since this is a 're-hire', some data, such as the officer's name and address, will already be present. However, you need to click on each tab of the Applicant Data page and review and, if necessary, make corrections.
4	Click the Save button. The Applicant ID field will change from "NEW" to the next available system-generated number:  Make note of the system-generated number (enter it on the Checklist for Accessions, which can be found in enclosure (2) to this Part), you will need it to complete the remaining steps.

Continued on next page

Accession Procedure, Continued

Procedure (continued)

Step	Action
5	Enter the Applicant Contract Data, per the procedures beginning on page 3-24 of this Part. Here are some tips to supplement the general instructions found in chapter 3 of this Part: **Contract Status/Content Tab:** • "**Contract Number**" -- You must view officer's previous contract history in Admin Workforce > Use > Contract Data to determine next number. • "**Contract Begin Date**" **–** Use the accession date (day after last day of active duty) for this field. **Do not** use the date the oath was administered. **Contract Clause Tab:** • "**Contract Type**": Select "COM" for Commissioned Officer. • "**Contract Term**": Determine and enter the number of years and months remaining until the officer's 60th birthday. **Service Information Tab:** • **Carry forward the officers' pay base date, active duty base date, and initial military obligation dates.** • Since this is a Rehire you can obtain much of the information necessary to complete Service Information tab and 5 (the Prior Service tab) from the officer's current record. Go to: Administer Workforce > Administer Workforce (GBL) > Use > **Contract Data** • Enter the Employee ID and click the search button. Click the **Service Dates** tab and the '**Prior Svc Info**' button. • You should also refer to JUMPS Segment 00 (Fixed data) to obtain/verify service dates.

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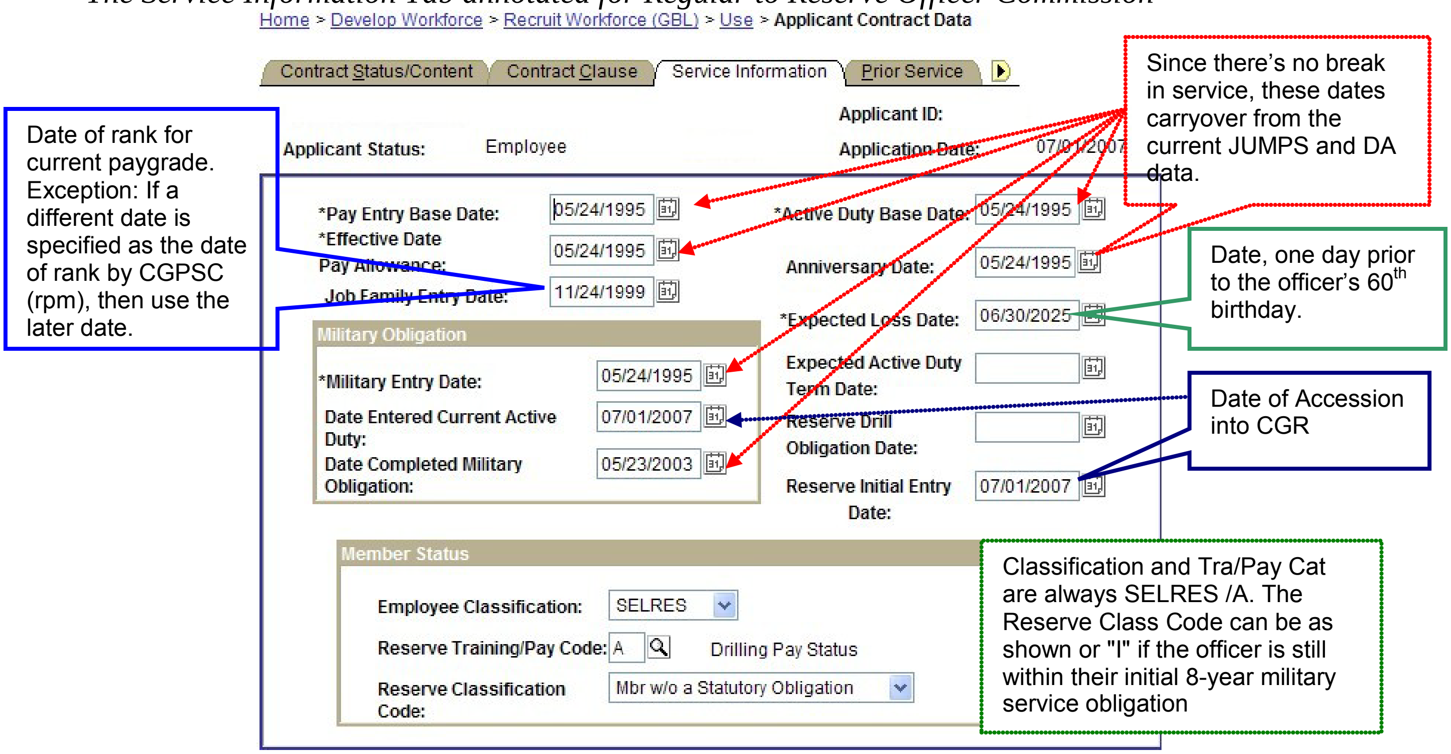
Accession Procedure, Continued

Procedure (continued)

The Service Information Tab annotated for Regular to Reserve Officer Commission



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Accession Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

<u>Prior Service Tab:</u>

• The Military Service End Date field on the Prior Service tab of the Contract Data page should be the date immediately before the effective date the accession.

Career Information Tab:

• Verify the Job Code field (should display rank for this accession) and the Commission date should display the date of this accession.

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

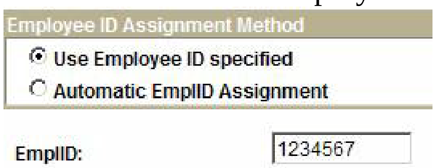
Continued on next page

Accession Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>
Complete the steps in the <u>Hire Applicant</u> topic <u>(Chapter 3, page 39)</u>.

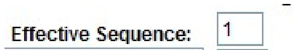
• Enter the Officer’s employee ID number in the field on the first tab.



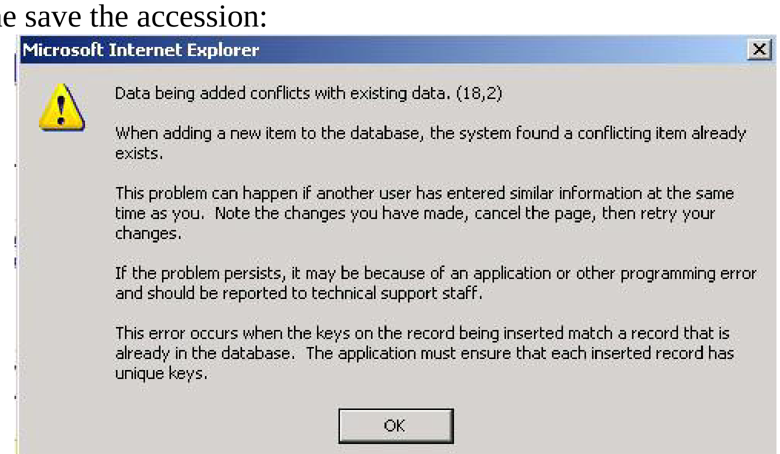
• Ensure the effective date entered is the day immediately following the effective date of the member's discharge.

• Pay particular attention to the requirement in Step 5.D of the <u>Hire Applicant</u> topic to change the Effective Sequence number of the Job Data entry:

  • This is a rehire immediately following a discharge, change the Effective Sequence number field to 1. The discharge transaction will place a row in job data with the same effective date.



Failure to adjust the Effective Sequence number will result in this error when attempting the save the accession:

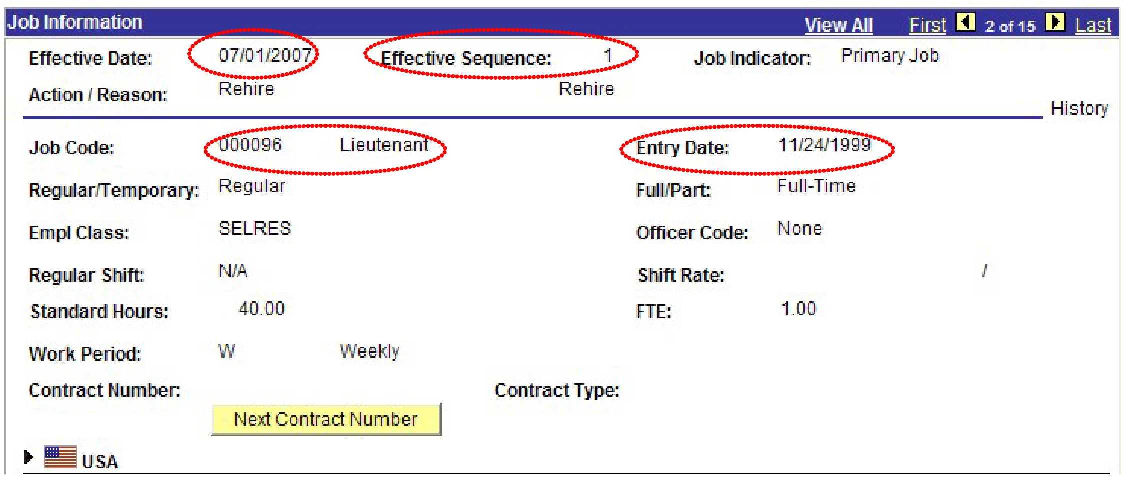
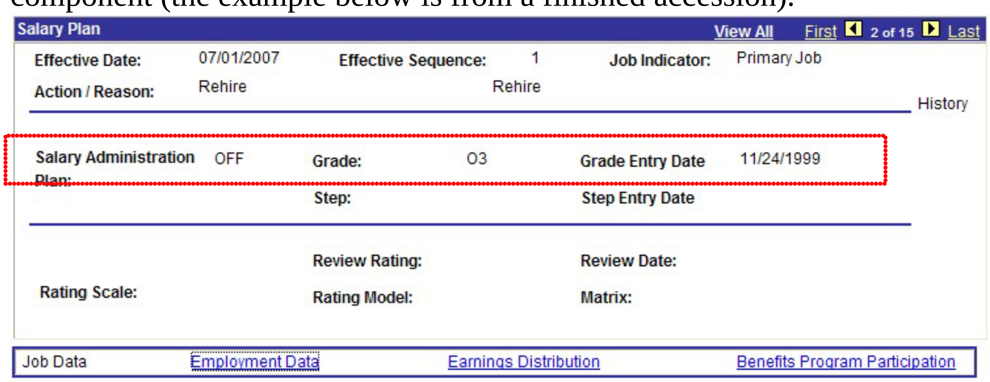


</td></tr>
</table>

Continued on next page

Accession Procedure, Continued

Procedure (continued)

Step	Action
7	Also, be sure to correctly enter the officer's effective date of pay grade on the **Job Information tab** as described in Step 6 of the Hire Applicant procedure. 
8	Review the **Salary Plan tab** to ensure the Salary Administration Plan (OFF for officer or OFE for officer w/more than 4 yrs. AD enlisted time), Grade and Grade Entry Date (date of rank) are all correct. These fields can be corrected at this time in the **Hire Applicant** component (the example below is from a finished accession). 
9	**After** successfully saving the **Hire Applicant** page, you can endorse the Reserve PCS order if one was issued by the ISC (pf/fot). Home > Administer Workforce > Track Global Assignments (GBL) > Use > **PCS Orders**

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PPC SPO Manual

Part VIII, Accessions

Chapter 9, Resumption of Enlisted/CWO Status

Upon Termination as a Temporary Officer

Chapter Overview

Introduction

This chapter describes the process used to complete an accession of an officer into enlisted or warrant officer status whose temporary commission is terminated.

Reference

(a) Coast Guard Personnel Manual, COMDTINST M1000.6(series), Article:

- 1.A.3.c
- 12.A.5.g
- 12.A.12.b

In this chapter

The following topic is covered in this chapter.

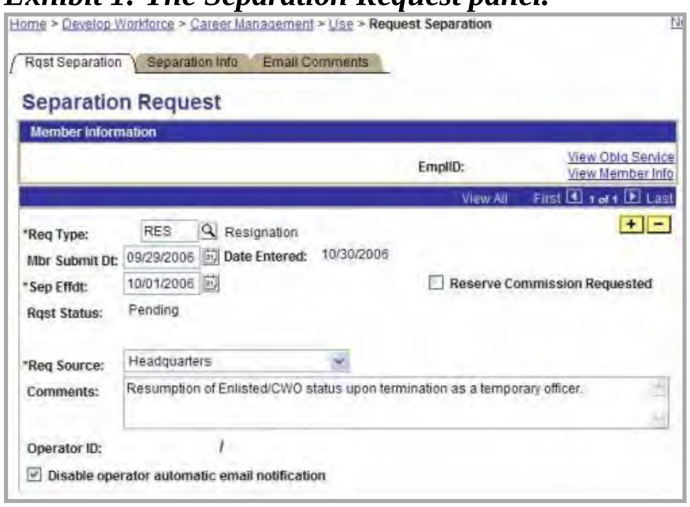
Process Overview

Introduction

This section provides an overview of the steps required to effect the Resumption of Enlisted/CWO status upon termination as a temporary officer.

Process

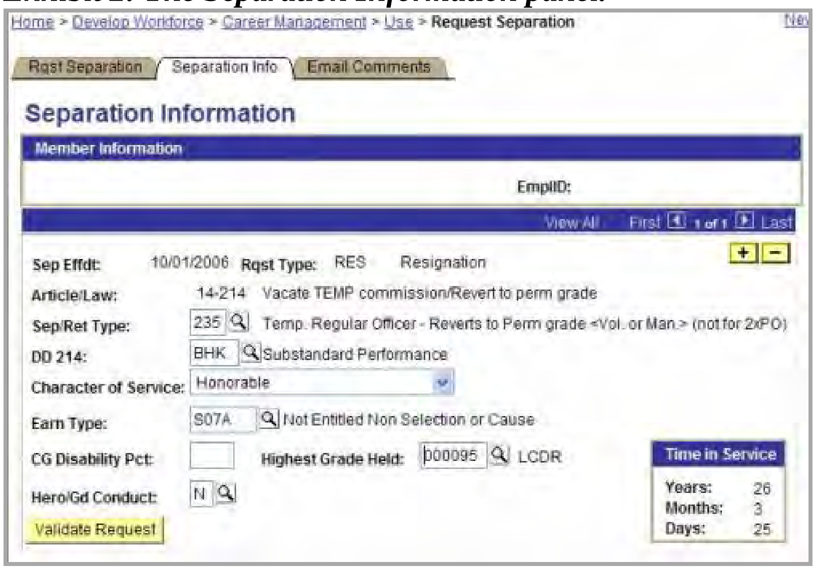
This is an overview of the process used for an officer who is authorized to revert to enlisted or CWO status when appointment as a temporary officer is terminated or vacated.

Stage	Description
1	CGPSC (OPM-1): 1. Issues memo authorizing reversion to permanent grade. Copy provided to SPO. 2. Enters and approves the separation authorization in Direct-Access. An approved separation authorization is required in order for the SPO to effect the Discharge/Rehire stages. Here are example screen shots of the separation authorization data entry in Direct Access (Note: Actual Request Types and SBD codes are determined by CGPSC (OPM-1) following established procedures, these exhibits are demonstration purposes only). ***Exhibit 1: The Separation Request panel.*** 

Continued on next page

Process Overview, Continued

Process (continued)

<table>
<tr><th>Stage</th><th>Description</th></tr>
<tr><td>1</td><td>Exhibit 2: The Separation Information panel.

</td></tr>
<tr><td>2</td><td>SPO (for the officer's current unit) creates:
1. Job Requisition Number for the officer's current position number (the officer will be "rehired" into their current department/position. CGPSC will issue separate PCS orders to effect changes to unit assignments after the reversion has been recorded in the system. This is to ensure the new PCS orders are issued with the correct grade/rate information). The procedure for creating a Job Requisition number can be found in Chapter 2-A this guide.
2. Applicant ID Number. A new applicant ID is required in order process the re-accession. The procedure for creating an Applicant ID number can be found in Chapter 2-B of this guide.</td></tr>
</table>

Continued on next page

Process Overview, Continued

Process (continued)

<table>
<tr><th>Stage</th><th>Description</th></tr>
<tr><td>3</td><td>SPO (for the officer's current unit) enters and approves Discharge transaction in Direct Access using the appointment termination date as the effective separation date. Procedures for entering the Discharge transaction can be found in Chapter 8 of this guide.

Note: In order to reveal the CGPSC approved separation, the SPO must insert a new separation row. When first accessing the separation component, the most recent completed separation will be shown. Click the add a new row button to begin a new separation.

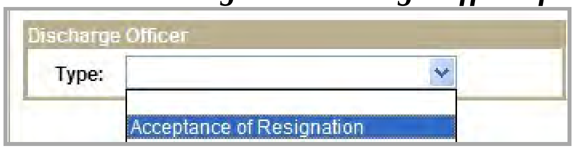
Exhibit 3: Separation Component before inserting new row.

Exhibit 4: Separation Component after inserting new row.
</td></tr>
</table>

Continued on next page

Process Overview, Continued

Process (continued)

Stage	Description
3 (con’t)	***Exhibit 5: Setting the Discharge Officer field.*** 
4	SPO (for the officer's current unit) enters the accession. Procedures for entering the Accession transaction can be found in Chapter 8 of this guide. Notes: Keep the following key points in mind when entering the rehire transaction (procedures are illustrated in the procedures referenced above): • When completing the **Applicant Contract Data Contract Clause** tab be sure to: • Use the next available contract number (0002, 0003, etc). • Use **Contract Type** of "*COM*" for reversion to CWO or "*ENL*" for reversion to enlisted status. • Enter Years and Months of service remaining until the member reaches their 30th anniversary of active duty service in the **Contract Term field**. • When completing the **Applicant Contract Data Service Information** tab be sure to: 1. Copy dates from the member's Statement of Creditable Service page (http://www.uscg.mil/ppc/ps/administer_workforce/statement_of_creditable_svc.htm) page with the exception of: 2. **Job Family Entry Dat**e - This will be the member's date of rank for the grade/rate reverting to. 3. **Expected Loss Date** and **Expected Termination Date** - Last day of the month of the member's 30th year of active duty. 4. Set the **Employee Classification** to "*Regular*" for active duty personnel.

Continued on next page

Process Overview, Continued

Process (continued)

<table>
<tr><th>Stage</th><th>Description</th></tr>
<tr><td>4
(Con’t)</td><td>

When completing the Applicant Contract Data Contract Data Prior Service tab be sure to:

Enter the grade of the member's temporary appointment in the Military Grade Field.
Use the Commissioning and Resignation dates for the Begin and End Service Dates
Mark the DD-214 verified field (Note: No DD-214 will be issued).

When completing the Applicant Contract Data Career Information tab be sure to:

Set the Job Code field to reflect the grade/rate the member is resuming.
Set the Enlistment/Commission date to the date of rank (same as Job Family Entry Date on Service Information tab).

When completing the Hire Applicant section be sure to:

Confirm that the "Use Employee ID Specified" option is selected and that the employee ID is correct.
Click the Job Data link and:
Change the Effective Sequence to "1" (Default is "0", this will conflict with the separation transaction and prevent you from saving the rehire).
Change the Job Code and Entry Date fields on the Job Information tab to reflect the grade/rate the member is reverting to and the date of rank.
Change the Pay Grade and Grade Entry Date on the Salary Plan tab reflect the grade/rate the member is reverting to and the date of rank.

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

Continued on next page

Process Overview, Continued

Process (continued)

Stage	Description
5	CGPSC (OPM-2) issues PCS orders to effect department or position number changes.
6	PCS is processed IAW established procedures (see PPPM Chapter 2-A) and the following topics in this help file: • PCS Travel Order (http://www.uscg.mil/ppc/ps/pcs/pcs_travel_order.htm) • PCS Departing Endorsement (http://www.uscg.mil/ppc/ps/pcs/pcs_departing_endorsement.htm) • PCS Reporting Endorsement on Orders (if department ID/PDS change is directed) (http://www.uscg.mil/ppc/ps/pcs/pcs_reporting_endorsement_on_orders.htm)

Chapter 10
SELRES Direct Commissions/ ROCI

Overview

Introduction

This chapter highlights problematic areas SPOs may encounter when completing accessions into the Coast Guard Reserve for SELRES Direct Commission candidates.

References

(a) CG Recruiting Command R 142042Z MAY 10, ALCGRECRUITING 003/10143655
(b) Personnel Manual, COMDTINST M1000.6(series), Chap 1-C.
(c) Recruiting Manual, COMDTINST M1100.2(series)

Discussion

Reference (a) is an example of an annual message, which announced SELRES Direct Commission primary and alternate candidates. CGRC will notify candidates of any pending requirements and coordinate enlistments with the recruiting offices.

A review of the available references for this program did not reveal the remaining steps in the accession/orders process. Reference (b) does state, in 1.C.3.d, "*Orders to ROCI will be coordinated with local* [the] *PERSRU*." Since candidates coming from civilian status must first be accessed into the Coast Guard Reserve before orders can be issued, that responsibility falls to the local SPO.

Accession Procedures

Introduction

This section supplements chapter 3 of this manual. It provides information on completing accessions for SELRES DCO candidates.

Accession Reference Table

Keep the following key points in mind when processing accessions for SRDC selectees who are not currently in the Coast Guard Reserve.

Item	Non Prior Service	Prior Service	Ref
Job Requisition Number	145079 (CGPSC/IRR)		Enlisting into any other department ID number will result in charges for SGLI accruing. The ISC will need to issue a Reserve PCS order, after the Officer completes ROCI to effect transfer to the SELRES unit/position.

Continued on next page

Accession Procedures, Continued

Accession Reference Table **(continued)**

Item	Non Prior Service	Prior Service	Ref
Enlistment pay grade	**See Exhibit VIII-10-1, COMDT (CG-131) memo 1001 of 3 Jul 2008 (Page VIII-10-8 of this part)**		
Enlistment term	8 years	4 Years	Recruiting Manual 4.C.10.d.3
Pay Entry Base Date	Pay Entry Base Date must be equal to the Contract Begin Date, Active Duty Base Date and Effective Date Pay Allowances.	Compute IAW Appendix C of the Personnel and Pay Procedures Manual.	Section 2.B.4, Coast Guard Pay Manual, COMDTINST M7220.29(series)

Continued on next page

Accession Procedures, Continued

Accession Reference Table **(continued)**

Item	Non Prior Service	Prior Service	Ref
Active Duty Base Date	Reservists don't have an active duty base date. However, an entry in this field is required to complete the accession in DA. Use the contract begin date as the ADBD.		
Effective Date for Pay Allowances	Date of accession (same as contract begin date)	Date of accession	
Job Family Entry Data	Date of accession	Date of accession	
Expected Loss Date	For reserve-enlisted members, this will be the expiration of enlistment (8 years if no prior service).	For reserve-enlisted members, this will be the expiration of enlistment (4 years if prior service).	
Expected Active Duty Term Date	Reserve Enlisted -- Blank	Reserve Enlisted -- Blank	
Military Entry Date	Date of accession	Date of the member's initial entry into the Armed Forces. Includes both active and inactive service, as well as time spent at military academy, OCS, or Delayed Enlistment.	

Continued on next page

Accession Procedures, Continued

Accession Reference Table **(continued)**

Item	Non Prior Service	Prior Service	Ref
Date Entered Current Active Duty	Date of accession		
Date Completed Military Obligation	Determine and enter the date the member's military obligation will be completed	If the military obligation of the member has expired, enter the date it expired.	
Anniversary Date	The Anniversary Date shall be the date of enlistment/appoint-ment.	If there is no break in service, enter 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 hours that the member was in civilian status, on the inactive status list, or in the Retired Reserve.) If there is a break in service, enter the date the member is re-entering in the Reserve component.	
Reserve Drill Obligation Date	This will normally be specified on the Statement of Understanding for the Reserve Enlistment (For SELRES Direct Commission Candidates use the date 3 years from the projected ROCI class graduation date).		
Initial Reserve Entry Date	Accession date	Date of initial entry into any reserve forces.	
Employee Classification	Inactive Ready Reserve (IRR) Category J = RSV Enl wait/attend OCS/ROCI		A reserve member status change must be submitted to change to SELRES/A upon first day of AD.

Continued on next page

Accession Procedures, Continued

Reserve Orders Reference Table

Key these key points in mind when completing the Reserve Orders (R990) transaction for SRDC selectees.

Field	Entry
Reserve Specific Info Tab:	
Type of Duty	Select **'Act Duty Training - AT'** from the drop-down list Note: Previously we recommend IADT orders. However, CG-1222 advises that ADT is the correct choice. ROCI is not a pipeline training program for the SELRES but is simply a three-week ADT-AT program.
Payment for Duty	Select 'Pay and Allowances' from the drop-down list
Payment for Travel	Select 'Single Travel Claim' from the drop-down list
Entitlements	Select Short-Term for SELRES DCO/ROCI school ADT orders.
Dept Benefiting from this duty	Completed by system with Department ID of member's current unit (traces back to the requisition number used in the accession), Change it to the ID for the location where the member will be assigned for ADT (004750 OFFICER CAND SCHOOL)
Dept. funding this Order	Enter 003465' - COMMANDANT (G-WTR)
LUFS Project Code	Will be filled in by system, no need to change.
Reserve Orders tab:	
Purpose	Select 'Structured Training-General' from the drop-down list.
Order Begin Dt	Enter the date the member is scheduled to begin travel to the ADT site. This is normally one day prior to the class convening date unless the member is traveling from O'CONUS and more than 1 day of travel time is authorized. Travel via POC is not authorized on accession orders.
Order End date	Enter the date the member will complete ADT and return home.
Authorizing Official	Enter the name of the person signing the orders.
Is Travel Authorized...?	Mark this checkbox.

Continued on next page

Accession Procedures, Continued

Reserve Orders Reference Table **(continued)**

<table>
<tr><th>Field</th><th>Entry</th></tr>
<tr><td colspan="2">Partial Entitlements Tab</td></tr>
<tr><td>BAH RC Entitlement Code</td><td>
<table>
<tr><th>Entitlement</th><th>Non Prior Service</th><th>Prior Service</th></tr>
<tr><td>Member without dependents</td><td>D (Without dpns; CG owned single quarters)</td><td>G (Without depns and mbr not assigned govt quarters)</td></tr>
<tr><td>Member with dependents</td><td>L (With depns; Mbr & depns not assigned govt qtrs)</td><td>L (With depns; Mbr & depns not assigned govt qtrs)</td></tr>
<tr><td>Member authorized BAH at the With Dependents rate based on payment of child support</td><td>T (W/depns; payment of child support; mbr not assigned govt qtrs)</td><td>T (W/depns; payment of child support; mbr not assigned govt qtrs)</td></tr>
</table>
</td></tr>
<tr><td>Travel BAS Entitlement</td><td>“E” Enlisted BAS.</td></tr>
<tr><td>Duty BAS Entitlement</td><td>
<table>
<tr><th>Non Prior Service</th><th>Prior Service</th></tr>
<tr><td>N - No Entitlements (Per CG PAYMAN, Figure 3-2, rule 10, when an enlisted member is in recruit training or non-prior service member attending OCS/ROCI, then the BAS entitlement is none.)</td><td>M (Enl BAS minus Discount Meal Rate) -- Essential Messing Unit</td></tr>
</table>
</td></tr>
</table>

Officer Uniform Allowance

The initial uniform allowance of $400.00 for Reserve officers is authorized, per chapter 3.K.2 of the CG Pay Manual, when the officer:

(a) first reports to active duty in **excess of 90 days**,
(b) completes 14 days of active duty [as an officer?], or
(c) completes 14 drills.

SPO should not submit the Officer Uniform Allowance claim until one of the above conditions is met. They must ensure they’ve established a tracking system for recent ROCI gradates to ensure they do submit the claim as soon as the officer is eligible.

Exhibit 10-1: Enlistment Paygrades

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

Commandant
United States Coast Guard

1900 Half Street SW
Washington, DC 20593-0001
Staff Symbol: CG-1311
Phone: (202) 475-5449
Fax: (202) 475-5912
Email: Richard.J.Lavigne2@uscg.mil

1001

MEMORANDUM

JUL -3 2008

From: Andrea L. Contratto
Andrea L. Contratto, CAPT
COMDT (CG-131)

Reply to Attn of: LT Richard Lavigne
202-475-5449

To: PSC (ADV)

Subj: CLASSIFICATION OF SELECT RESERVE DIRECT COMMISSION (SRDC) STUDENTS AS OFFICER CANDIDATES

Ref: (a) Coast Guard Personnel Manual, COMDTINST M1000.6A
(b) Coast Guard Recruiting Manual, COMDTINST M1100.2E

1. After careful review of refs (a) and (b), the Office of Reserve Affairs, Policy and Plans Division (CG-1311), has determined the policy for accessing Select Reserve Direct Commission (SRDC) candidates and paying these candidates while attending Reserve Officer Candidate Indoctrination (ROCI) is unclear resulting in gaps. Members selected through the SRDC program shall be considered Officer Candidates. SRDC members with no prior military service, active or inactive, shall be accessed into the Individual Ready Reserve (IRR) as a Seaman Apprentice (Officer Candidate) IAW ref (a) 1.B.5.j for the purpose of accession and transit to ROCI. All Officer Candidates, including civilians with no prior military service or a former enlisted person of any other service attending ROCI, serving in pay grade up to E-4 shall be temporarily advanced to OCUI2 (Pay grade E-5) while they are Officer Candidates undergoing instruction IAW ref (a) 1.B.5.j.3. Coast Guard members selected to attend this program will hold the rate held at time of discharge if greater than E-5.

2. CG-1311 will ensure that refs (a) and (b) are updated during the next scheduled revisions to reflect this clarification of existing policy. If you have any questions or concerns, LT Richard Lavigne has been assigned as the action officer for this and can be reached at Richard.j.lavigne2@uscg.mil or 202-475-5449.

#

Copy: CGRC
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CGA

PPC SPO Manual

Part VIII, Accessions

Chapter 11, Recruiting and Analysis Tracking System To Direct Access (RATS2DA)

Overview

Introduction

This chapter outlines the procedures for authorized Accession points to enter enlistment data from the Recruiting and Analysis Tracking System (RATS) to Direct Access (DA).

References

(a) Recruiting Manual, COMDTINST M1100.2(series)

Discussion

The Recruiting and Analysis Tracking System (RATS) to Direct Access (DA) interface is designed to import accessions data directly from the Coast Guard Recruiting Command (CGRC) internal recruiting system and into the Coast Guard's human resources management system, Direct Access.

Training Center Cape May must still verify all data processed accurately into Direct Access.

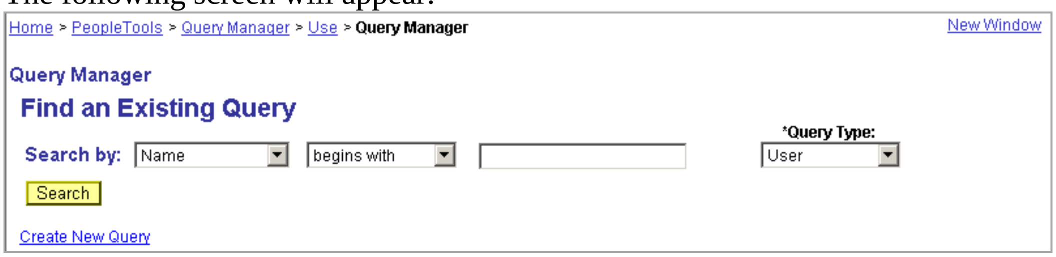
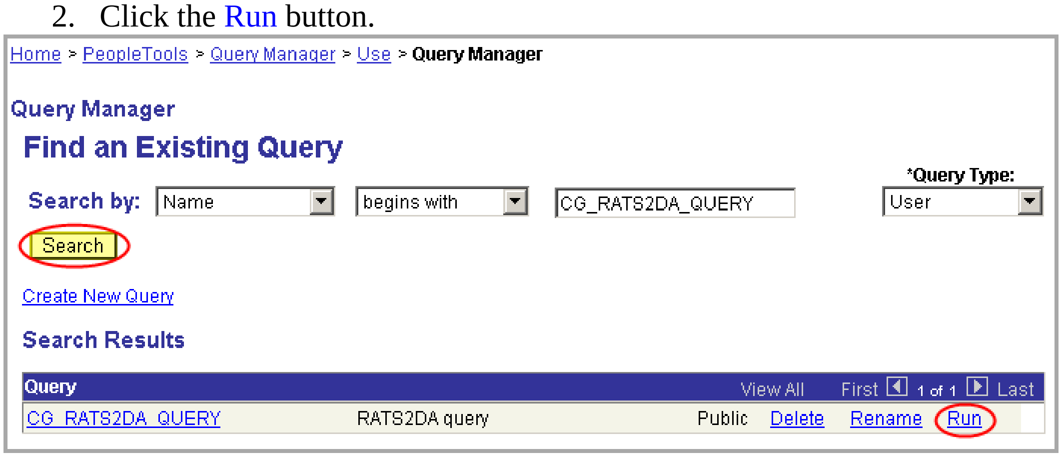
RATS2 DA Interface Query Procedures

Introduction

This section outlines the procedures to run a Direct Access (DA) query, to identify accessions processed by Coast Guard Recruiting Command (CGRC) via RATS2DA.

Procedures

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Log into Direct Access and path to:
People Tools>Query Manager>Use>Query Manager

The following screen will appear:

</td></tr>
<tr><td>2</td><td>1. Enter CG_RATS2DA_QUERY and click the Search button.
2. Click the Run button.

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

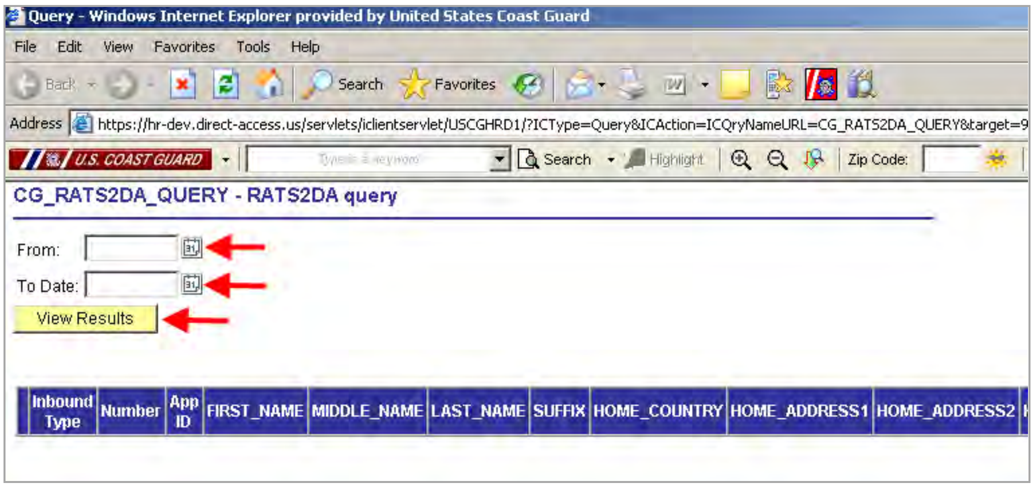
Continued on next page

RATS2 DA Interface Query Procedures, Continued

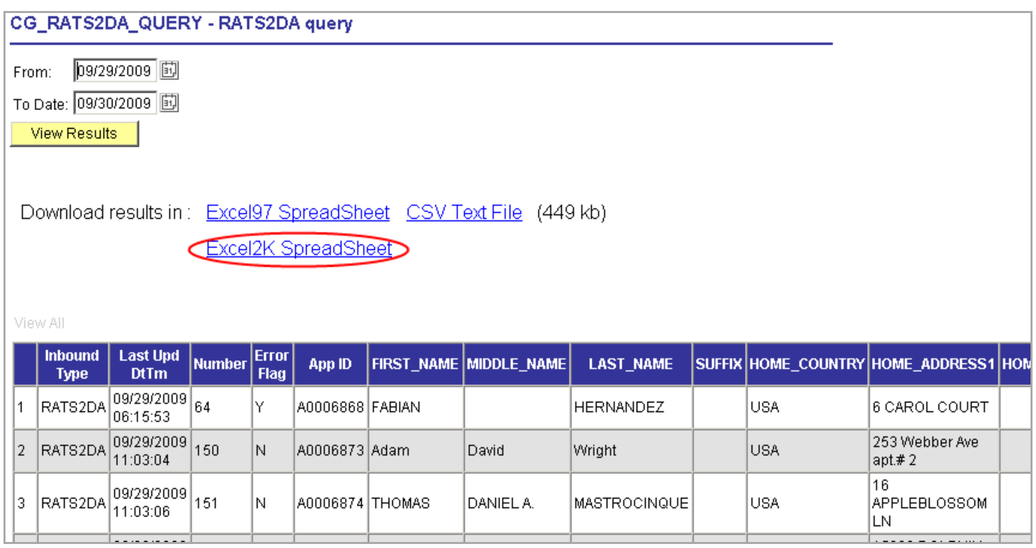
Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
Enter a From Date/To Date for the time period you wish to see results, then click View Results.

Always enter the To Date as the day after the actual time range you want – i.e. for results on 9/29 enter 9/29/09 in From Date and 9/30/09 in To Date



</td></tr>
<tr><td>4</td><td>
Once the results have been produced they can be downloaded to Excel by clicking on the Excel2K Spreadsheet link:



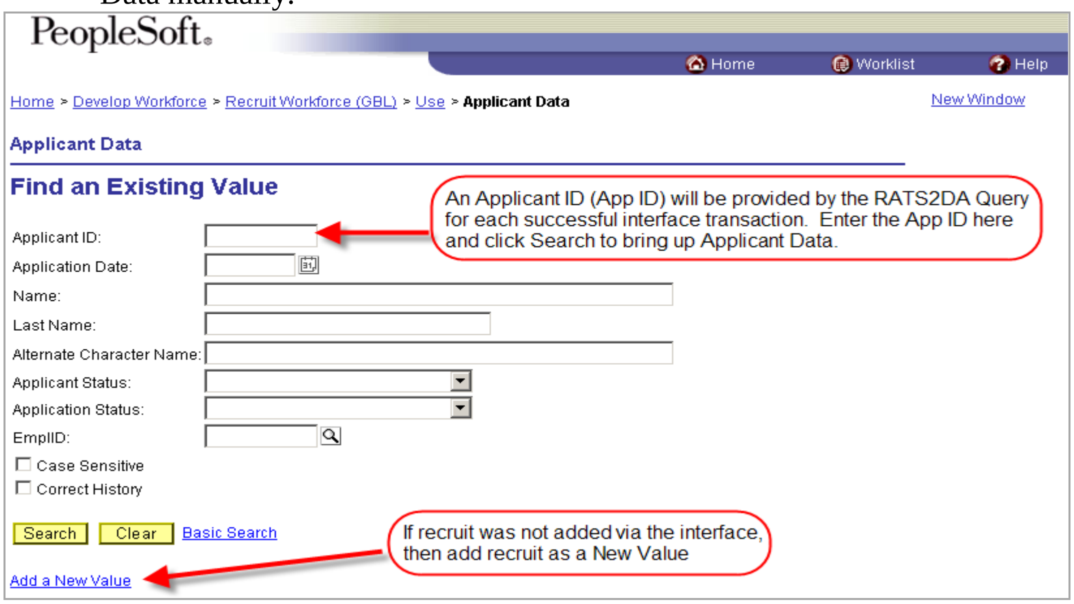
</td></tr>
</table>

Applicant Data

Introduction

This section outlines the procedures to validate the Applicant Data that was transferred to DA via RATS2DA interface.

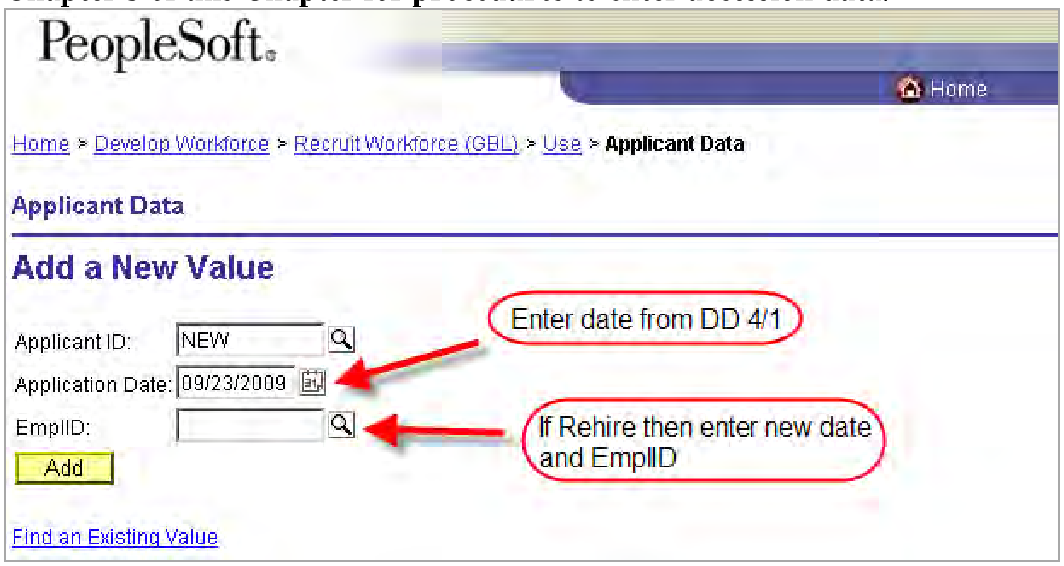
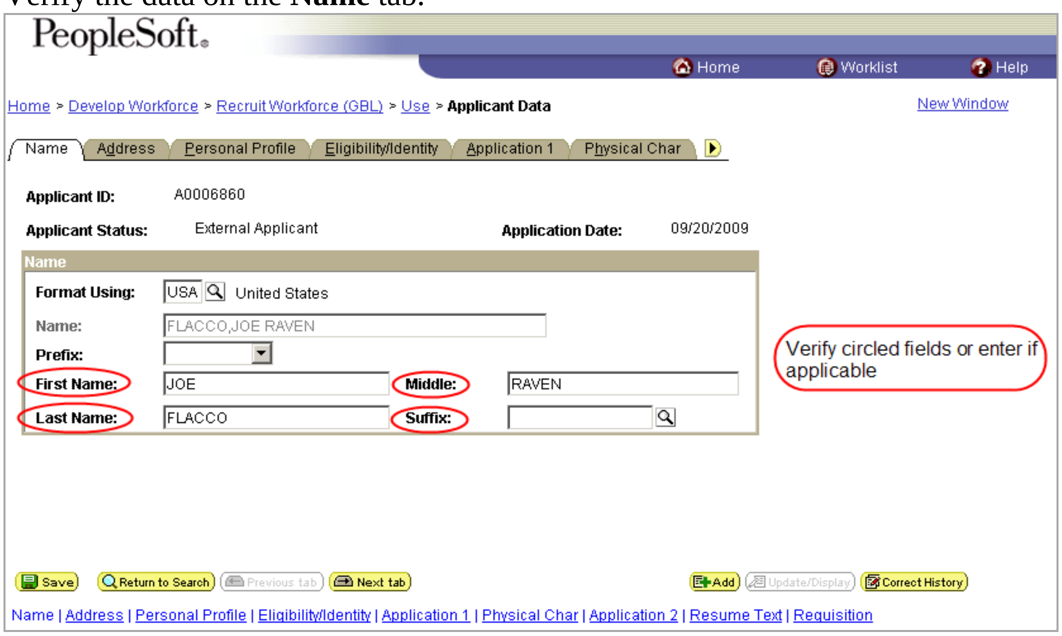
Procedures:

Step	Action
1	Log into DA and Navigate to: Develop Workforce> Recruit Workforce (GBL)> Use> Applicant Data 1. Verify that the data was loaded correctly via the interface for each member identified on the **CG_RATS2DA_QUERY** Excel Spreadsheet. For members loaded correctly into DA, proceed to Step 3 below. 2. For all members not loaded from interface, you must add the Applicant Data manually. 

Continued on next page

Applicant Data, Continued

Procedures: (continued)

Step	Action
2	If member was not added via interface, you must enter all data manually. **Refer to Chapter 3 of this Chapter for procedures to enter accession data.** 
3	For members loaded accurately, you must verify all data loaded via the interface. Verify the data on the **Name** tab. 

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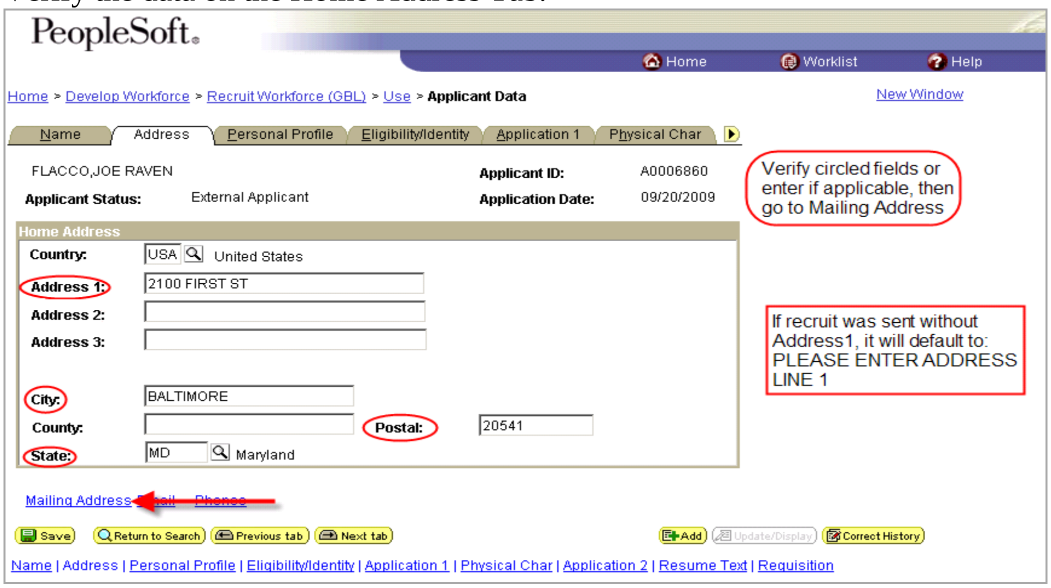
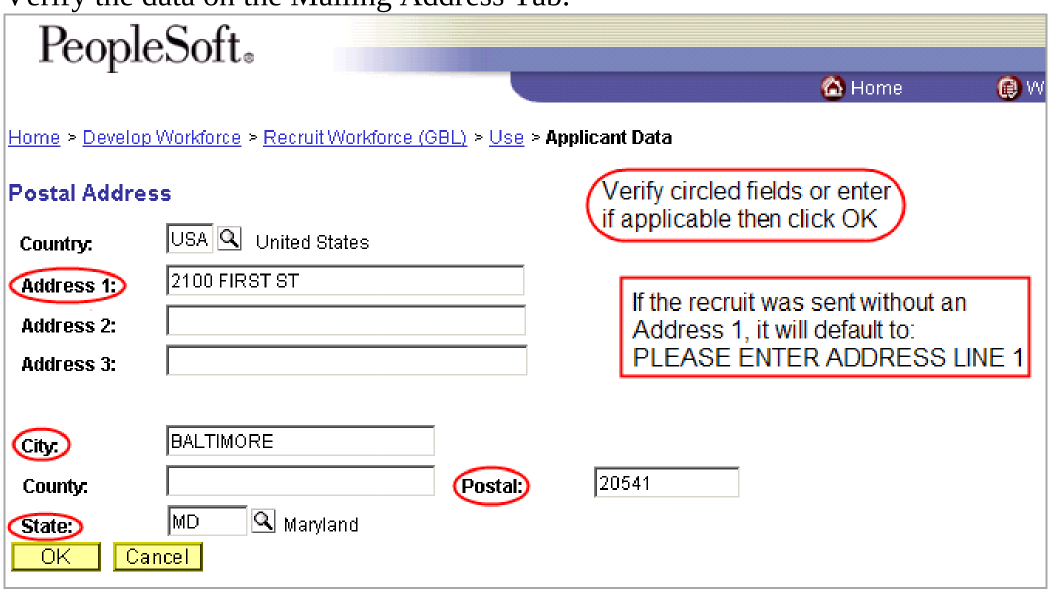
Applicant Data, Continued

Procedures (continued)

Step	Action
4	Verify the data on the Home Address Tab. 
5	Verify the data on the Mailing Address Tab. 

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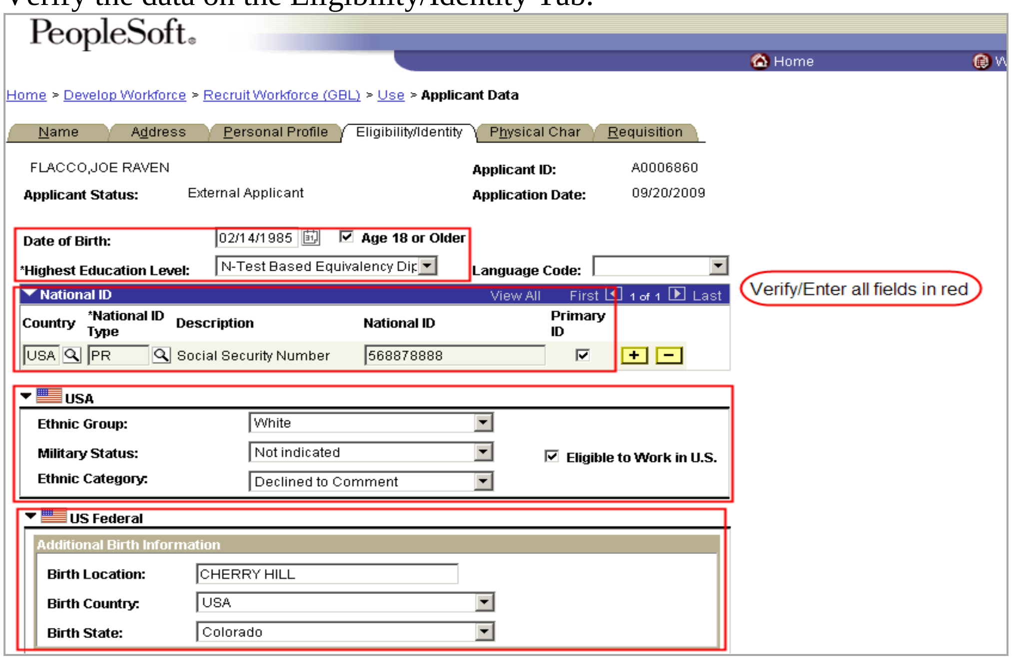
Applicant Data, Continued

Procedures (continued)

Step	Action
6	Verify the data on the Personal Profile Tab.

Step	Action
7	Verify the data on the Eligibility/Identity Tab.



Identification Data

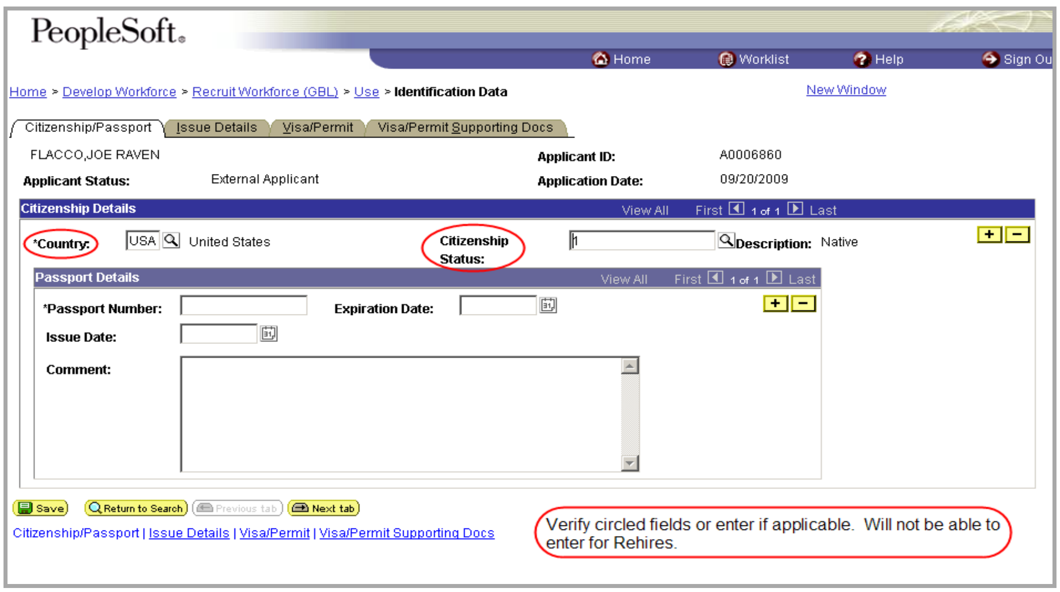
Introduction

This section outlines the procedures to validate the Identification Data that was transferred to DA via RATS2DA interface.

Procedures

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Log into DA and Navigate to:
Develop Workforce> Recruit Workforce (GBL)> Use> Identification Data

1. Verify that the Citizenship status was loaded correctly via the interface.
2. Enter data if data was not loaded via interface.



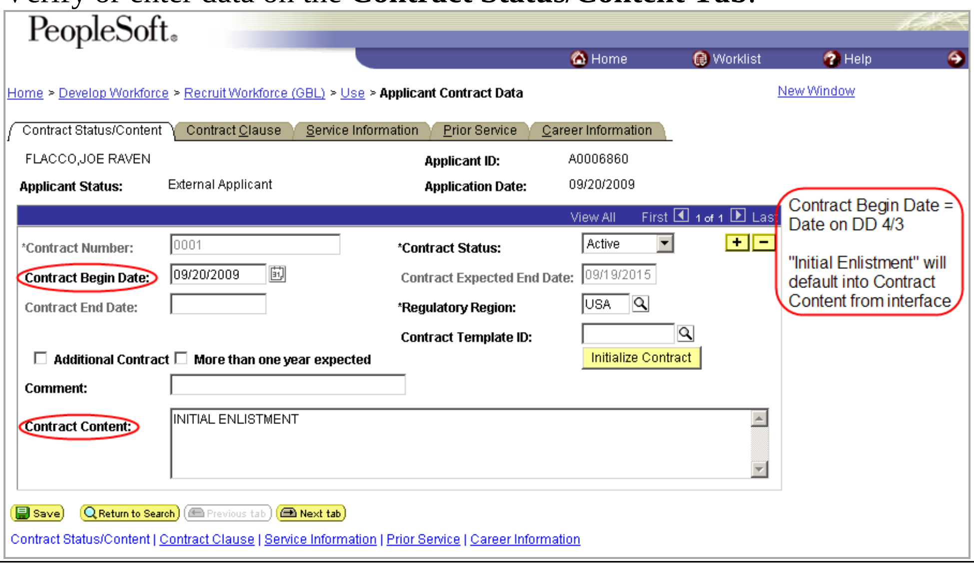
</td></tr>
</table>

Applicant Contract Data

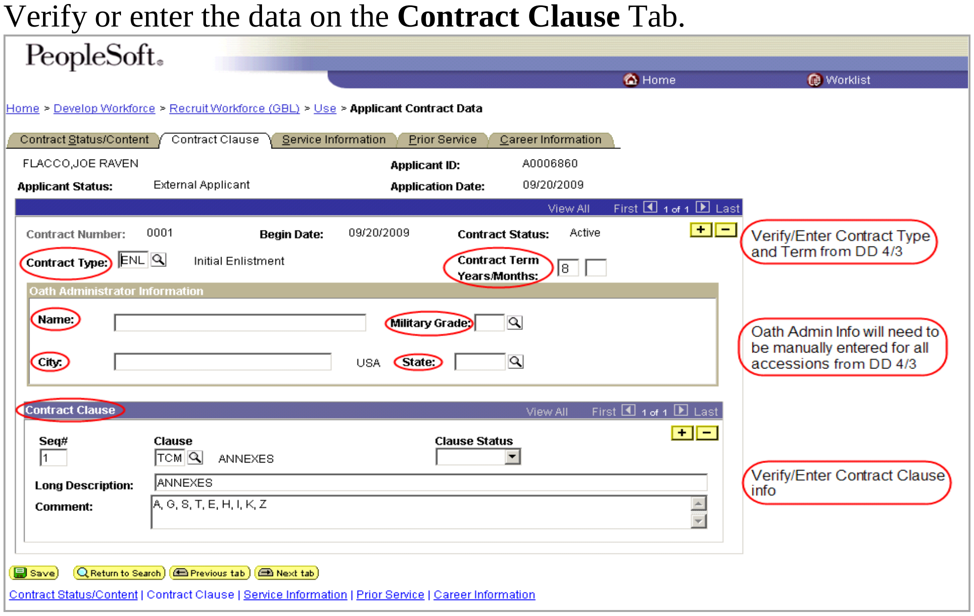
Introduction

This section outlines the procedures to validate the Contract Data that was transferred to DA via RATS2DA interface.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Log into DA and Navigate to:
Develop Workforce> Recruit Workforce (GBL)> Use> Applicant Contract Data
1. Verify that the Contract Data was loaded correctly via the interface.
2. Enter data if data was not loaded via interface.
3. You may need to correct or enter data for DEPOT or Reserve members.
Verify or enter data on the Contract Status/Content Tab.



</td></tr>
<tr><td>2</td><td>
Verify or enter the data on the Contract Clause Tab.



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

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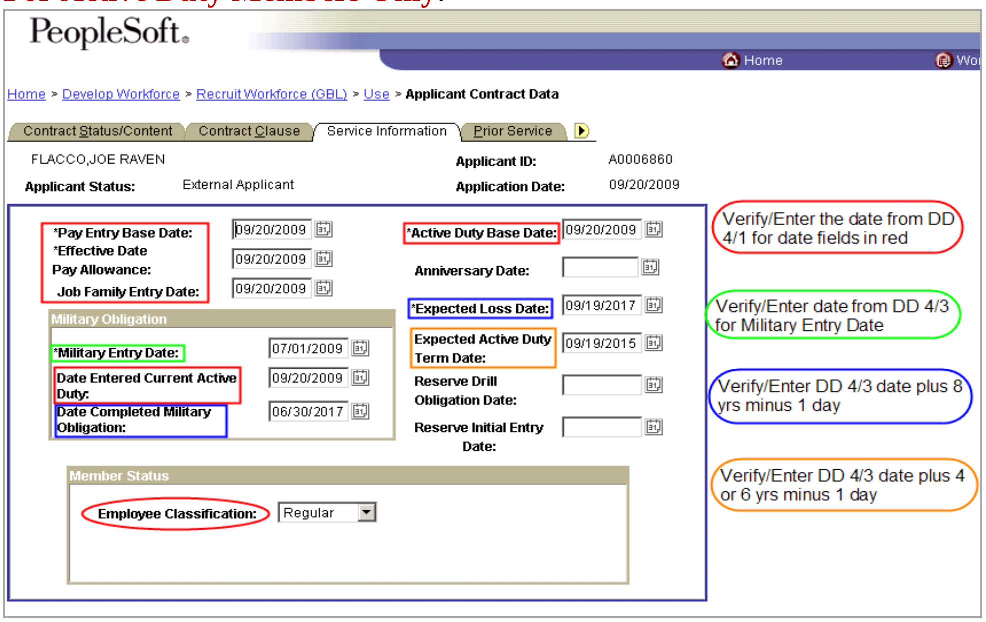
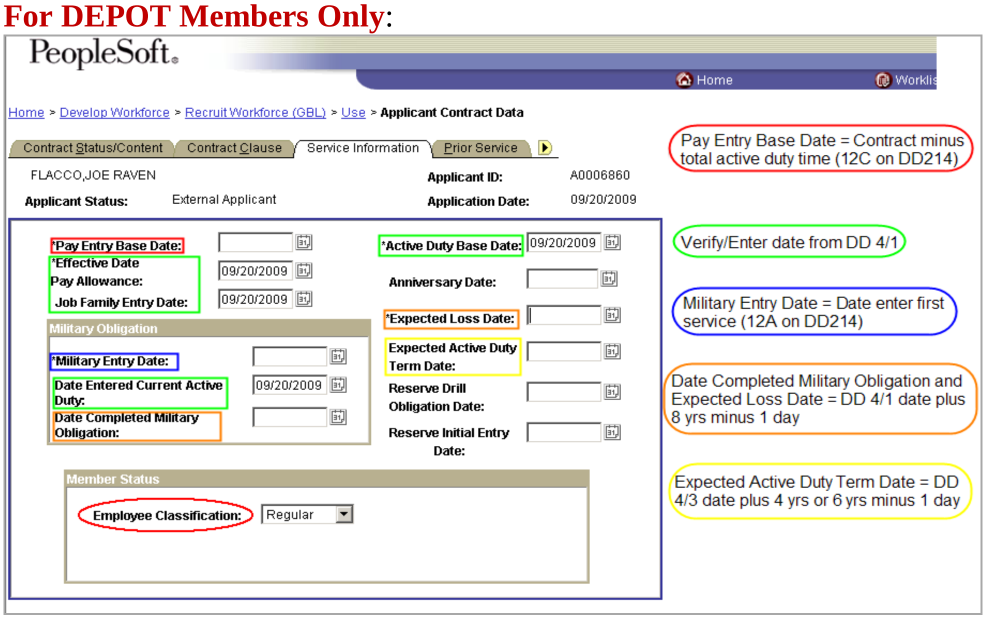
Applicant Contract Data, Continued

Procedures (continued)

Step	Action
3	Verify or enter the data on the **Service Information** Tab. If data is not accurate, calculate and enter the correct data. **For Active Duty Members Only**:  **For DEPOT Members Only**: 

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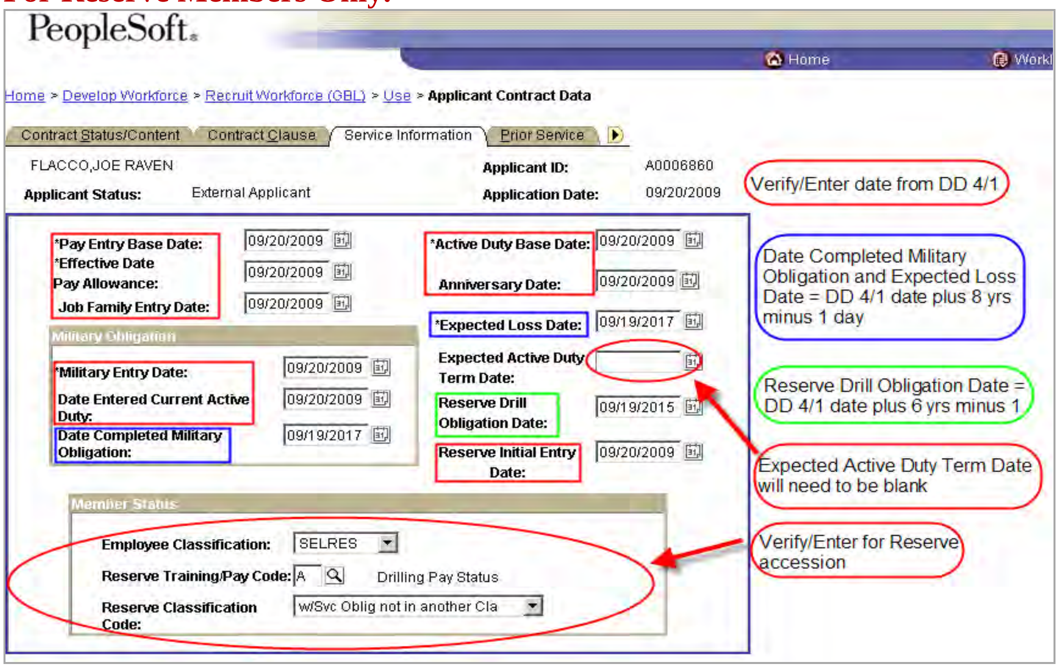
Applicant Contract Data, Continued

Procedures (continued)

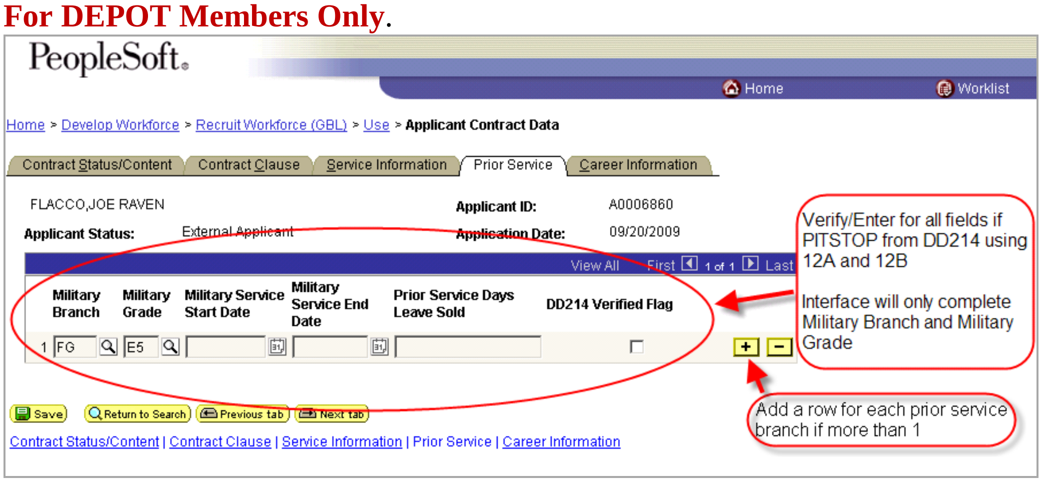
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3
(con't)</td><td>

For Reserve Members Only.



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

Verify or enter the data on the **Prior Service** Tab.
For DEPOT Members Only.



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

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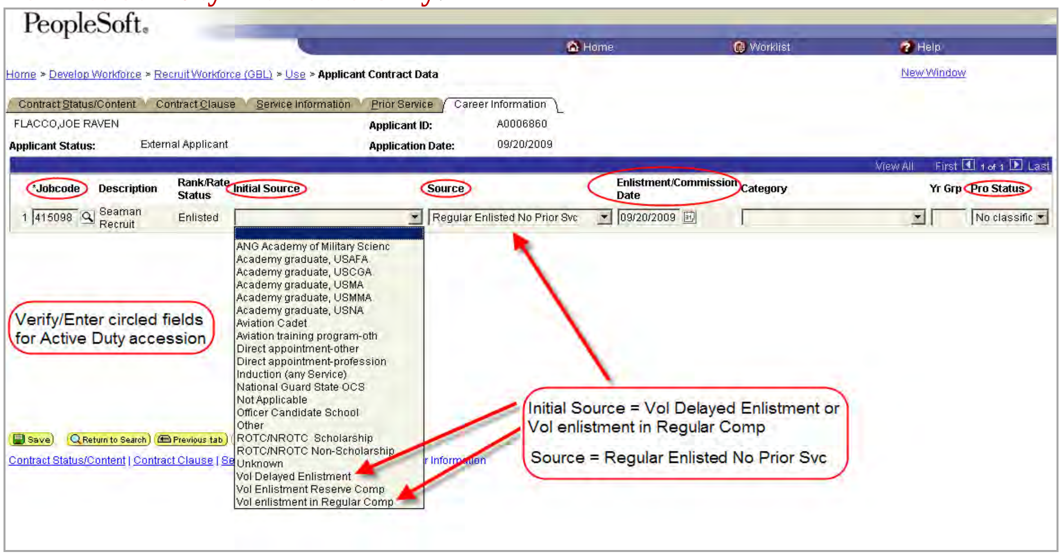
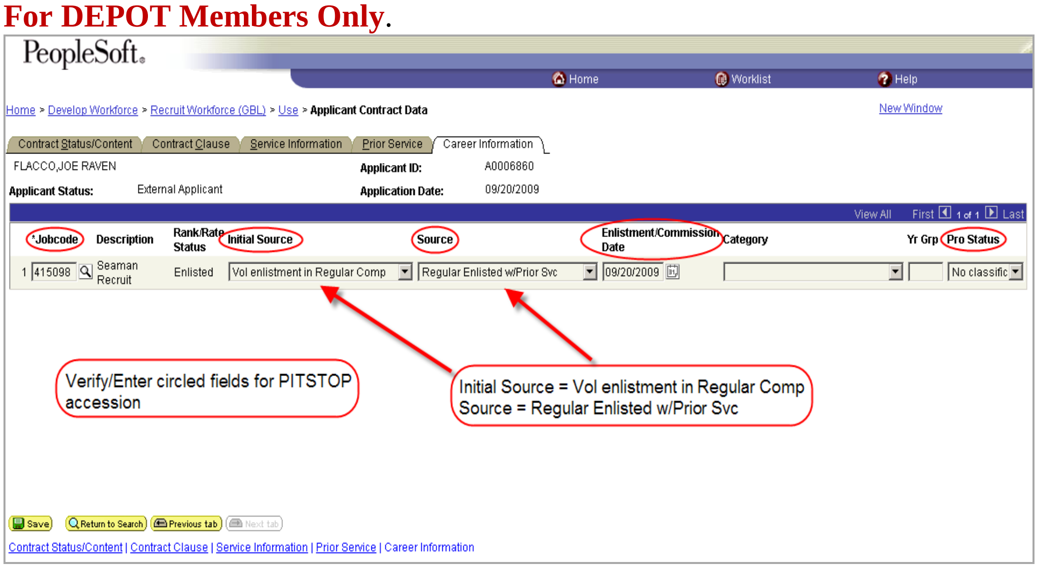
Applicant Contract Data, Continued

Procedures (continued)

Step	Action
5	Verify or enter the data on the **Career Information** Tab. **For Active Duty Members Only**.  **For DEPOT Members Only**. 

Continued on next page

Applicant Contract Data, Continued

Procedures (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5
(con't)</td><td>

For Reserve Members Only.

For DEPOT and Reserve.

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

Continued on next page

Applicant Contract Data, Continued

Procedures (continued)

Step	Action
6	Be sure to save any manual entry of data for an accession. After completing verification/entry of accession the recruit's paperwork is turned over to an auditor for the Hire Applicant process. An applicant who is rehired into DA and previously had an EmplID will not be able to be rehired through Hire Applicant – a rehire row will need to be added to Job Data. After hiring an applicant, if data is incorrect (i.e. SSN, Name) then Topeka must be notified to make changes.

Enclosure (1)
New Accession Documents Checklist

- ☐ Original Orders
- ☐ Copy of Social Security Card
- ☐ Copy of Driver's License
- ☐ Copy of Birth Certificate
- ☐ Proof of residency status or naturalization, if applicable
- ☐ Copy of Enlistment/Reenlistment Document (DD-4).
- ☐ Copy of Officer Candidate School Agreement (CG-3211 or CG-3211A) *OCS only*
- ☐ Copy of Certificate of Release or Discharge from Active Duty (DD Form 214), if applicable.
- ☐ Conditional release from other service, if applicable
- ☐ Pay Delivery Worksheet (CG PPC 2015) ***WITH VOIDED CHECK!***
- ☐ W-4 Tax Form for Fed taxes
- ☐ W-4 Tax Form or appropriate State form for State Taxes
- ☐ State of Legal Residence Form (DD 2058)
- ☐ SGLI Election and Certificate (SGLV 8286)
- ☐ SGLI Family Coverage Election (SGLV 8286A), if applicable
- ☐ Designation of Beneficiaries (CG PPC 2020D)
- ☐ Dependency Worksheet (CG PPC 2020)
- ☐ Certified copies of documentary evidence of dependents (marriage certificate, birth certificates and SSN cards), if applicable.
- ☐ One copy of Statement of Financial Obligation/Spouse's Consent (CG-4891), if applicable. The reverse side of this form must be completed and signed by recruiter or notary and spouse.
- ☐ Emergency Contact Sheet (local form)
- ☐ Personal Information Form (local form)

MEDICAL FORMS NEEDED and OPTIONAL DOCUMENTS:

- ☐ Chronological Record of Service (CG-4057).
- ☐ Health Record Cover (CG-3443).
- ☐ Copy of Report of Medical Examination (DD 2808).
- ☐ Copy of Report of Medical History (DD 2807-1).
- ☐ Immunization Record.
- ☐ Copy of College Transcript (optional)

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Enclosure (2)

Overview

Introduction

This enclosure provides an accession checklists for SPOs and post-accession audit checklists for accession points (CG Academy and TRACEN Cape May).

In This Enclosure

The following checklists are available in this enclosure:

SPO Checklists for Accessions

Introduction

These checklists are provided to assist the Servicing Personnel Office (SPO) in completing all necessary Direct Access transactions required to complete an accession event on an active duty member or reserve member.

Before You Begin

The Job Requisition Number is a required in order to complete an accession in Direct Access (in addition to the member identifying data like date of birth, place of birth, SSN, etc.). TRACEN Cape May and the Academy will normally use a generic Job Requisition Number for their specific program (e.g. Enlisted recruit training, OCS, etc.). If you know the Position Number for the billet the member will be assigned to, you can search for the Job Requisition Number when entering Applicant Data. For field units, who are accessing members at their first duty station, the Position Number will be provided by the CGPSC Assignment Officer.

Discharges and Orders for Rehires

When conducting a REHIRE, the Discharge must be completed first. The normal progression when completing REHIRES is Discharge, REHIRE and Transfer. A REHIRE must be completed in that order. Also, the Assignment Officer will normally issue transfer orders prior to REHIRE, it is important that you do NOT approve these orders prior to the REHIRE as the orders will default to member's current Employee Class (e.g. If completing a Reserve Integration, the PCS orders will be treated like a Reserve unit change and you will not be able to complete the endorsements). You'll want to approve them AFTER the REHIRE has been complete.

Continued on next page

SPO Checklists for Accessions, Continued

Checklist-1 The data entry technician at the SPO (CGHRS Role User) completes the following items:

Step	Action	See Topic …	☑
1	Enter Applicant Data	Applicant Data Also see: • Diversity Data Overview • Physical Characteristics/Height Weight Frame Size Measurement	
	Upon saving the Applicant Data page, the system will generate the Applicant ID Number. Write the member's Applicant ID number in the space below.		
2	Enter Identification Data	Citizenship Status Changes	
3	Enter Education	Education (Degree(s))	
4	Enter Test Results (ASVAB Scores)	Test Results	
5	Enter Applicant Contract Data	Applicant Contract Data	
6	Forward package to supervisor (CGHRSUP Role User) to complete the "Hire Applicant" section		

Name:		**Applicant** ID #	

Continued on next page

SPO Checklists for Accessions, Continued

Checklist-2 The supervisor at the SPO (CGHRSUP Role User) completes the following items:

Step	Action	See topic …. in online help	☑
1	Complete the Hire Applicant Process **Warning**: If the person you are accessing has ever been a member of the Coast Guard, Coast Guard Reserve, Coast Guard Auxiliary, NOAA Commissioned Officer Corps, or a civilian employee of the U. S. Coast Guard, they already have an Employee ID number. The Hire Applicant process is used only when the applicant does not have an Employee ID number. Please use the Rehire a Former Member process, as described in the Direct-Access online manual, to complete the accession for anyone that has previously been affiliated with the Coast Guard or NOAA Corps.	Hire Applicant (Be aware of the date changes you'll need to make if the member did not report for duty the same day as accessed into the Coast Guard)	
	For new hires: Upon Saving the Hire Applicant Page the system will generate the **Employee** ID Number. Write the member's Employee ID number in the space below.		
2	Return package to technician (CGHRS Role User) to complete the remaining checklists.		

Name:		**Employee** ID #	

Checklist-3 The data entry technician at the SPO (CGHRS Role User) completes the following items to finish building the member's personnel a pay records:

Note: Effective 21 July 2011, you no longer have to wait 24 hours after completing the Hire Applicant before the system will allow you access to the new member's entitlements. Pay entitlements, pay delivery option, and tax withholding may be entered anytime after the Hire Applicant is approved.

Step	Action	See topic …. in online help	☑
1	Enter Tax Withholding (Federal and State)	Employee Tax Data Information	
2	Enter Direct-Deposit Information	Payment Option Election (Non Self-Service)	
3	Enter MGIB Allotment Election	Start a New Allotment	
4	Enter Family Members/Dependents	Dependency/Emergency Data Activity Guide	
5	Enter Emergency Contacts	Change Emergency Contacts (Non Self-Service)	
6	Enter SGLI Election	Elections and Beneficiaries	
7	Enter Family SGLI Election	Elections and Beneficiaries	
8	Endorse PCS Orders	PCS	

Continued on next page

Checklists for Accessions, Continued

Checklist-3 (Continued from previous page)

Step	Action	See topic …. in online help	☑
9	Start Entitlements (check applicable entitlements) ❑ BAH ❑ BAS ❑ Bonus (Enlistment) ❑ CCOLA ❑ Career Sea Pay ❑ Officer Uniform Allowance ❑ Aviation Pay ❑ Diving Duty Pay ❑ Hardship Duty Pay Location ❑ Hazardous Duty Incentive Pay ❑ FSA/FSH ❑ SDAP ❑ OHA/OCOLA ❑ Imminent Danger/Hostile Fire Pay ❑ Combat Tax Exclusion ❑ Advances (BAH/OHA/COLA) ❑ Saved Pay (if applicable	Employee Entitlements, Basic Navigation	

Name:		**Employee** ID #	

CG Academy Accession & Audit Checklists

Introduction

The following checklists provide additional steps for completing Academy accessions and reporting review management summary audits.

CG Academy Hire Process Checklist

NAME: ________________________________

DATE OATH OR ENLISTMENT: __________ APPLICANT ID:____________

EMPLID:_______________________________

SELRES DCO position#:____________SELRES DCO Req#: __________________

DCO HHG ORDERS SENT: __________
DCO ORDERS TONO FOR HHG ORDERS:________________

DCO DEPT ID ON ORDERS:____

- ☐ Applicant Data
  - Name
  - Personal profile
  - Eligibility/Identity
  - Minority Code *(same screen as Eligibility/Identity. Click Flag. Incl Hispanic/Non-Hispanic)*
  - Physical Characteristics
  - Requisition *(133044 OCS, 145079 for IRR DCO's, and various others for SELRES DCO's hired on Oath day-lookup with position number)*
  - Address *(mailing address .**DCO's**: Use home address ; **OC's**: 45 Mohegan Ave, New London, CT 06320.)*
- ☐ Identification Data
  - Citizenship *(1=born, 2=naturalized)*
- ☐ Education
  - Degree Type and Major. Check graduated box.
- ☐ Applicant Contract Data
  - Contract Status/Content *(1 new hire, other numbers for re-hires)*
  - Contract Clause *(FOR OCS: AXA, required// FOR DCO: nothing)*
  - Service Information *(OCS: IRR- P, w SVC oblig another class; DCO: IRR- H or SELRES, A)*
  - Prior Service
  - Career Information *(OCS JOBCODE: 451097. Must put applicable jobcode for DCO's)*

HIRE PROCESS

____ Done on ____________

Continued on next page

CG Academy Hire Process Checklist, Continued

APPLICANT and PAY DATA PROCESS

- ☐ Dependent Beneficiaries
- ☐ Approve EAD orders for DCO / Short Term IADT Orders for OCS. ***Must be done 24 hrs after the hire***. *(OCS: Partial Entitlements Code: W, E, N. IADT begins on travel day to OCS and ends the day before grad.)* _____ Order notes done.
- ☐ Employee Entitlements *(OCS: 1 day BAH-G on begin date IADT for single members then BAH D as of class convene or L for married members for all days. No COLA entered on short term IADT, No BAS for new accessions) (DCO: BAH, COLA, CM6 code C prior reserves or D new accessions as applicable if entitled.* **No entitlements started for overseas DCO's)** **BAH ZIP***:* ______________
- ☐ Direct Deposit *(must be done 24 hrs after the hire)*
- ☐ Employee Tax Data *(must be done 24 hrs after the hire)*
- ☐ OCS ONLY: advance/change rate to E5 OCUI2 451094, E6 OCUI1 451093, or E7 451092 *(must be done 1 PAYCYCLE after the hire)*
- ☐ SGLI and Benefits *See Accession guide for rules on initial Decline for IRR time. Start as of IADT or EAD Orders begin date. (must be done 24 hrs after the hire)*
  - *20: SGLI*
  - *25: Family SGLI*
- ☐ OCS & DCO IRR ONLY: Check status change to SELRES from IRR

IMAGING FOR ELECTRONIC PDR

- ☐ Scan all documents required for Electronic PDR and send to: ARL-PF-CGPSC-PSD-MR_DOCS

Accessions / Reporting Summary & Management Review

Class ___________________________ completed processing through the Coast Guard Academy (CGA), New London, CT on _____________. Members of the class are included on the attached EMPLID Roster Report indicating Active Duty (A), Cadet (C), or Reserve(R). Also attached are rosters of marital and/or BAH dependent status, BAS and uniform clothing allowance that have been checked and include reviewers' initials that the marital and/or BAH dependent status, BAS and uniform clothing allowance have been verified as correct. All open issues, except as noted below, have been resolved, coverage of which is noted on the individual checklists (circle those applicable): for Cadet, Officer Candidate School (OCS), Direct Commission Officer (DCO) or Scholar members. Based upon the summary and detailed reviews conducted, I conclude that adequate management review has been performed.

Summary Management Review conducted by:
Print Name: ____Rate/Rank: _____________
Position: ______________________________ Organization Code: __60-60100________
Telephone: _______________________ Email: ___ _________________________________

Signature: ____ Date: _________________

Exceptions Noted (put no exceptions if none, explain any open issues):
____
____
____
____
____
____
____
____
____
____

____

Recruit TRACEN Accession & Audit Checklists

Introduction

The following checklists provide additional steps for completing Recruit accessions and reporting review management summary audits.

Checklist	See Page
CG Recruit Hire Process Checklist – Active Duty	VIII-E-2-11
CG Recruit Hire Process Checklist – Reserve	VIII-E-2-12
Accessions / Reporting Summary & Management Review	VIII-E-2-13

Recruit Hire Process Checklist – Active Duty

RECRUIT PERSRU ACCESSION CHECKLIST

ACTIVE DUTY RECRUIT

RECRUIT: ____ANNEXES:___________
(Last Name, First Name, MI)

ACCESSING YN: _________________________________

NOTE: This checklist includes **ALL** transactions associated with a new active duty hire. Each step is to be initialed off when completed, and "copies" with initials already on the checklist are not authorized. Also, "copies" with your name at the top are not authorized. Everything will be HAND WRITTEN.

App. ID No.: A00________________ **EMPLID:** ______________

DEP Date: _______________________ **Contract Term:** _________
(If Applicable) **(YEARS)**

RANK/RATE: ____________________ **Enlist. DATE:** __________

TASK	YN INITIALS
Applicant Data	
Identification Data	
Education	
Applicant Contract Data	
Forward Record to YN1 for HIRE	

TASK	YN INITIALS
Hire Applicant	
Direct Deposit Information	
Dependent Information	
BAH	
COLA	

NOTE: The Application Date is the date that the recruit actually came onto Active Duty, and will not be the date that a recruit enters the DEP. DEP dates are used in the Military Entry Date Block, and are used to calculate the Date Completed Military Obligation Date and the Expected Loss Date which is 8 years later and calculated the same way that an End of Enlistment is calculated.

Additional Notes:

(1)____

(2)____

(3)____

(4)____

Any changes to this checklist must be approved by a Recruit PERSRU YN1

____

Recruit Hire Process Checklist – Reserve

RECRUIT PERSRU ACCESSION CHECKLIST

RESERVE RECRUIT

RECRUIT: ____ANNEXES:____________
(Last Name, First Name, MI)

ACCESSING YN: _________________________________

NOTE: This checklist includes **ALL** transactions associated with a new SELRES hire. Each step is to be initialed off when completed, and "copies" with initials already on the checklist are not authorized. Also, "copies" with your name at the top are not authorized. Everything will be HAND WRITTEN.

App. ID No.: A00_________________ **EMPLID:** _______________

Unit Assigned: ____________________ **(Drilling Unit)** **Enlist. DATE:** ___________

RANK/RATE: ____________________ **RP or RK:** ______________
(RPs Must be going to "A" School less than 06 days after Boot Camp, IAW ALCOAST 465/07)

Graduation Date: __________________ **Job Req. #:**______________

TASK	YN INITIALS
Applicant Data	
Identification Data	
Education	
Applicant Contract Data	
Forward Record to YN1 for HIRE	

TASK	YN INITIALS
Hire Applicant	
Direct Deposit Information	
Dependent Information	
IADT ORDERS (Long Term if RP, Short Term if RK)	
R990	
BAH	
COLA (RP RESERVES ONLY)	

NOTE: The Application Date is the date that the recruit actually came onto Active Duty, and will not be the date that a recruit enters the DEP. DEP dates are used in the Military Entry Date Block, and are used to calculate the Date Completed Military Obligation Date and the Expected Loss Date which is 8 years later and calculated the same way that an End of Enlistment is calculated.

Additional Notes:

(1)____

(2)____

(3)____

(4)____

Any changes to this checklist must be approved by a Recruit PERSRU YN1

Accessions / Reporting Summary & Management Review

For Company/Class (mm/dd/yyyy to mm/dd/yyyy)
____

Number of Accessions Reviewed ______

Checklists Attached Covering
[1] ____(Enter Number)___________ Recruit Accessions

Number of Accessions Entered, Reviewed, and Verified with no Exceptions __________

Exceptions (a-b=c):

a) Number of Exceptions Identified[2] ________

b) Number of Exceptions Corrected ________

c) Number of Exceptions Outstanding ________

Describe outstanding actions, responsible parties, contact information, and due dates:
____
____
____
____

Review Performed by: Print Name: _________________________Rate/Rank: ________

Position: ____________________Organization/Code: ________________________

Telephone: _______________________ Email: _______________________________

Signature: ______________________________________ Date:
____

Destroy: 3 years from date of review: Reference: General Records Schedule 7

[1] The checklist should indicate whether done for a group or an individual Accession. It should include the number of Accessions addressed.
[2] This amount includes the total number of individual exceptions noted on all Accessions included in this checklist. (e.g., if an individual Accession has more than one exception, count each individual occurrence).

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Enclosure (3)
Accession Tips, Problems and Error Messages

Table of Contents

Overview

Before you begin	This guide is designed to help assist you in the completion of your Hire or REHIRE. It is not going to teach you how to complete a Hire or REHIRE. For that, it is recommended review the entire Accessions guide.
Discussion	This guide will help troubleshoot problems you are experiencing with your Hire or Rehire and assist you with the Hire or Rehire process. This guide also provides a checklist to assist you in the documents and actions you will need to complete when completing a Hire or REHIRE. As well as helpful information on certain actions which need to be complete when completing a Hire or Rehire.

General Information Regarding Accessions

Menu path

All Hires and Rehires require 3 separate components for completion and must be completed in the below order. All 3 of these components are accessible by going: Home>Develop Workforce>Recruit Workforce>Use>

Discharges and Orders for Rehires

When conducting a REHIRE, the Discharge must be completed first. The normal progression when completing REHIRES is Discharge, REHIRE and Transfer. A REHIRE must be completed in that order. Also, the Assignment Officer will normally issue transfer orders prior to REHIRE, it is important that you do NOT approve these orders prior to REHIRE as the orders will default to member’s current EMPL Class. You’ll want to approve them AFTER the REHIRE has been complete.

About Applicant Data

In the Applicant Data section you will establish an Application ID. This is not to be confused with an Employee ID. For REHIRES, you normally place the EMPLID in the bottom box of the Add a New Value screen. However, there are personnel, when you try to Rehire them that will show they have an existing APP ID and it will be the EMPLID. You CANNOT hire anyone using their EMPLID as their APP ID. It simply will not work.

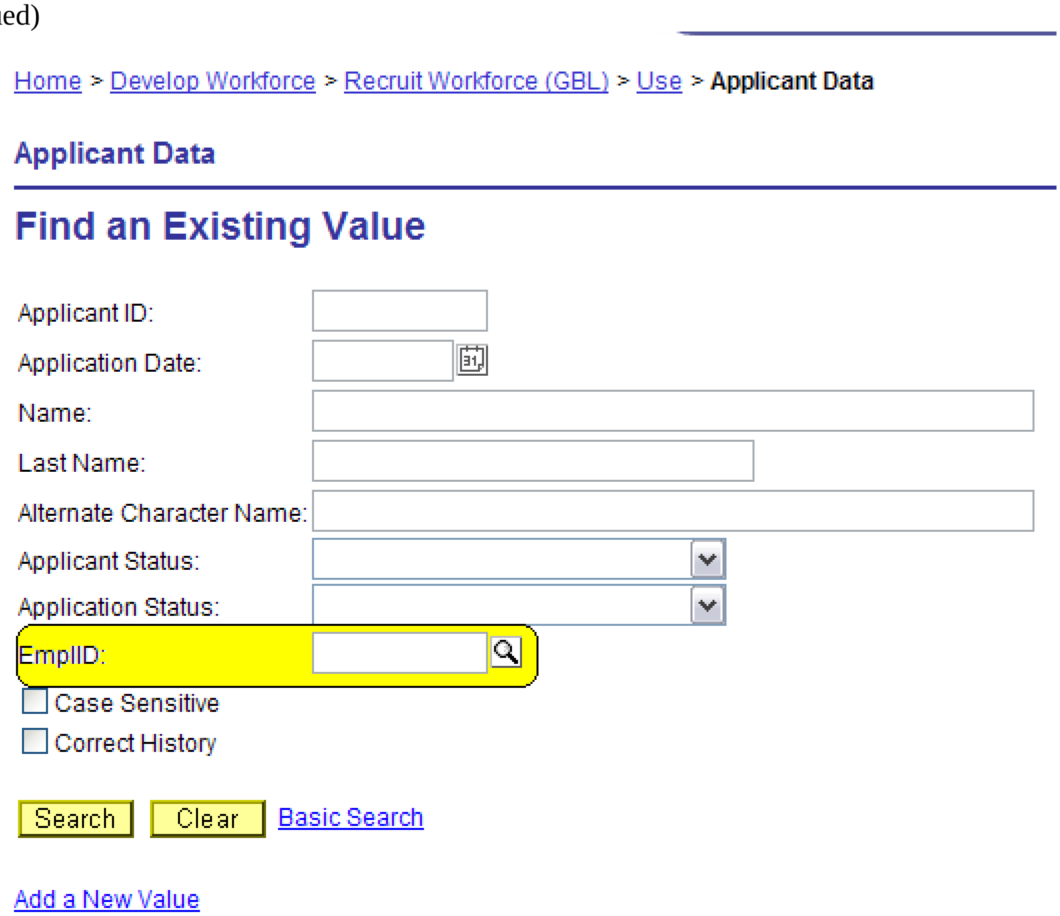
You will need to click the Add a New Value button. If member has an existing APP ID, ensure it says Active next to it vice Hired and verify the application status date next to it. If it says Hired you cannot use this App ID and you need to verify if member was not already Hired if the Application Status Date matches the actual Hire Date. For new Hires the Application Status date is not important, for Rehires the app status date must be the same as the actual Hire date.

Continued on next page

General Information Regarding Accessions, Continued

About Applicant Data (continued)

This function can be completed by the HRS or HRS SUP.



About Applicant Contract Date

In the Applicant Contract section you will establish the member's contract term and dates of service. The date of the contract is the date the member is officially signing a document affiliating with the US Coast Guard. It is very common for DCOs to sign their Oath of Office's a month in advance of attending DCO school. The date of the contract must match the date specified in their acceptance letter.

This function can be completed by the HRS or HRS SUP.

Continued on next page

General Information Regarding Accessions, Continued

Hire Applicant

The Hire Applicant function is the final step of the Hire process. It will submit the Hire Reporting Endorsement on Orders transaction (8c) and contract data to JUMPS as well as update all the individual components of Direct Access. All data must be correct in the first 2 steps (Applicant Data & Applicant Contract Data) in order for this step to be completed Successfully.

This function can be completed by the HRS SUP only and is NOT viewable to the HRS. All HRS personnel must notify their HRS SUP to complete the Hire Applicant portion of the REHIRE/HIRE.

Common Problems with Rehires

1. Requisition Numbers

1. Obtaining a job requisition number or when the search for a job requisition number returns with "No Matching Values".

Verify first with the issuing auth that the position number/Job requisition is correct.

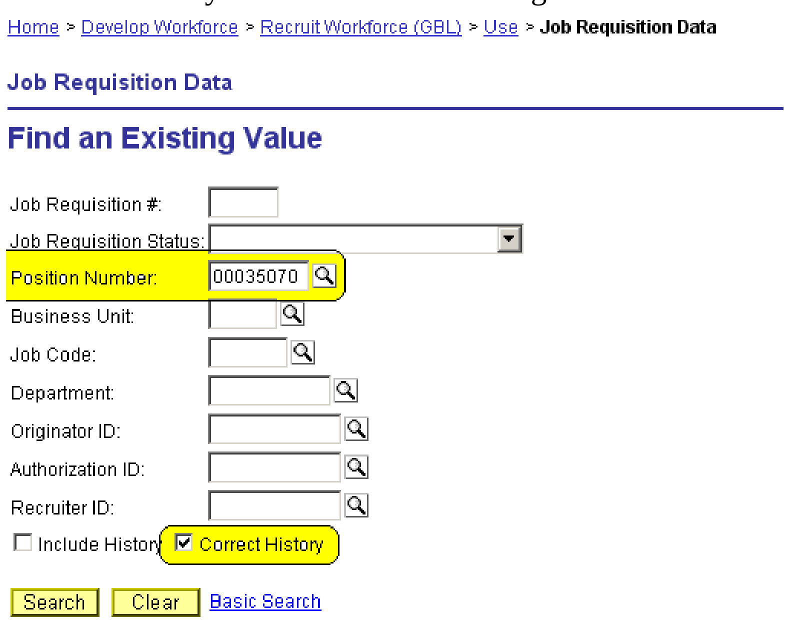
After that, if the position/requisition number is correct the HRS SUP must complete the following steps as the HRS will not have access to this area of Direct Access to open the Job Requisition.

To open a Job req number, here are the steps:

Step 1. Navigate to the following path:

Home > Develop Workforce > Recruit Workforce (GBL) > Use > Job Requisition Data

Step 2. Input the Position number in the Search Screen and click the "Correct History" checkbox before hitting Search.



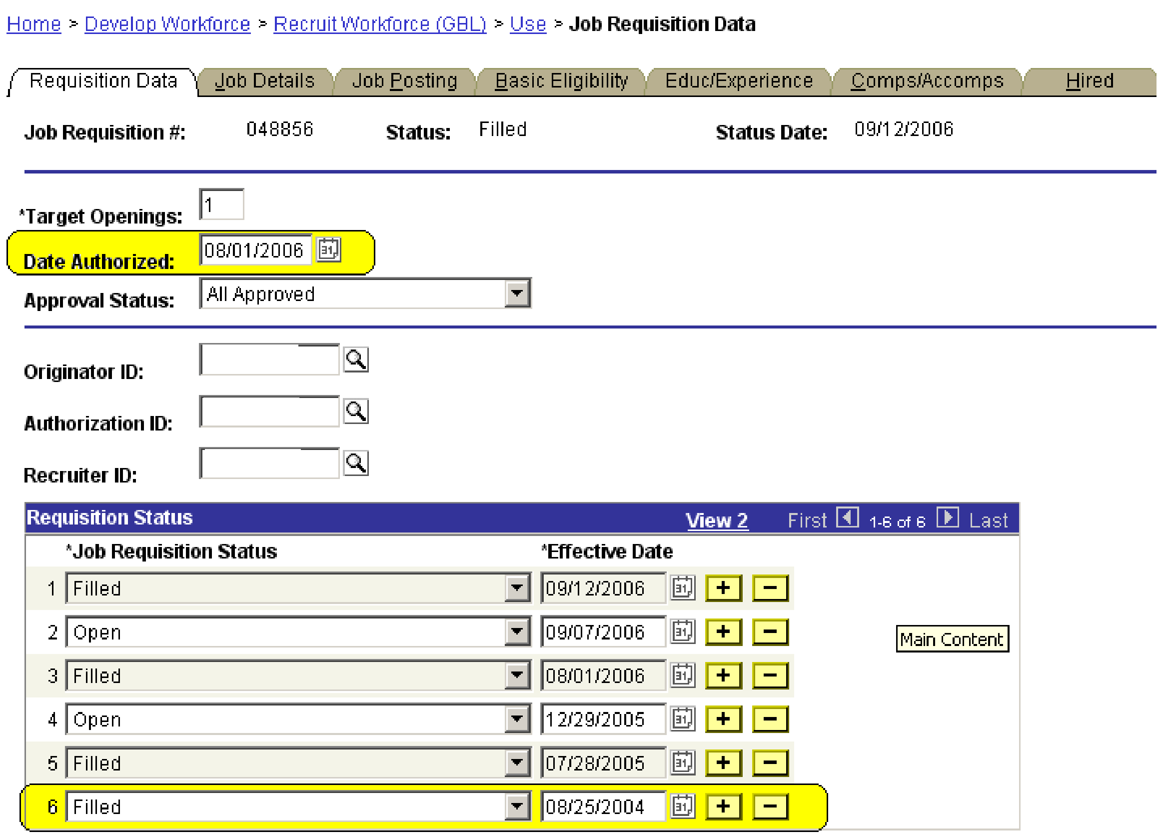
Continued on next page

Common Problems with Rehires, Continued

1. Requisition Numbers (continued)

In Review. From here you will notice in the below screen shot that the upper left hand corner of the Requisition tab shows this member's current job req number is 048856 and the status is Filled.

Step 3. To set the status of this to open, there are several things that need to be done. First ensure the Date Authorized matches the oldest Requisition Status. If it does not, you will need to ensure it matches this.



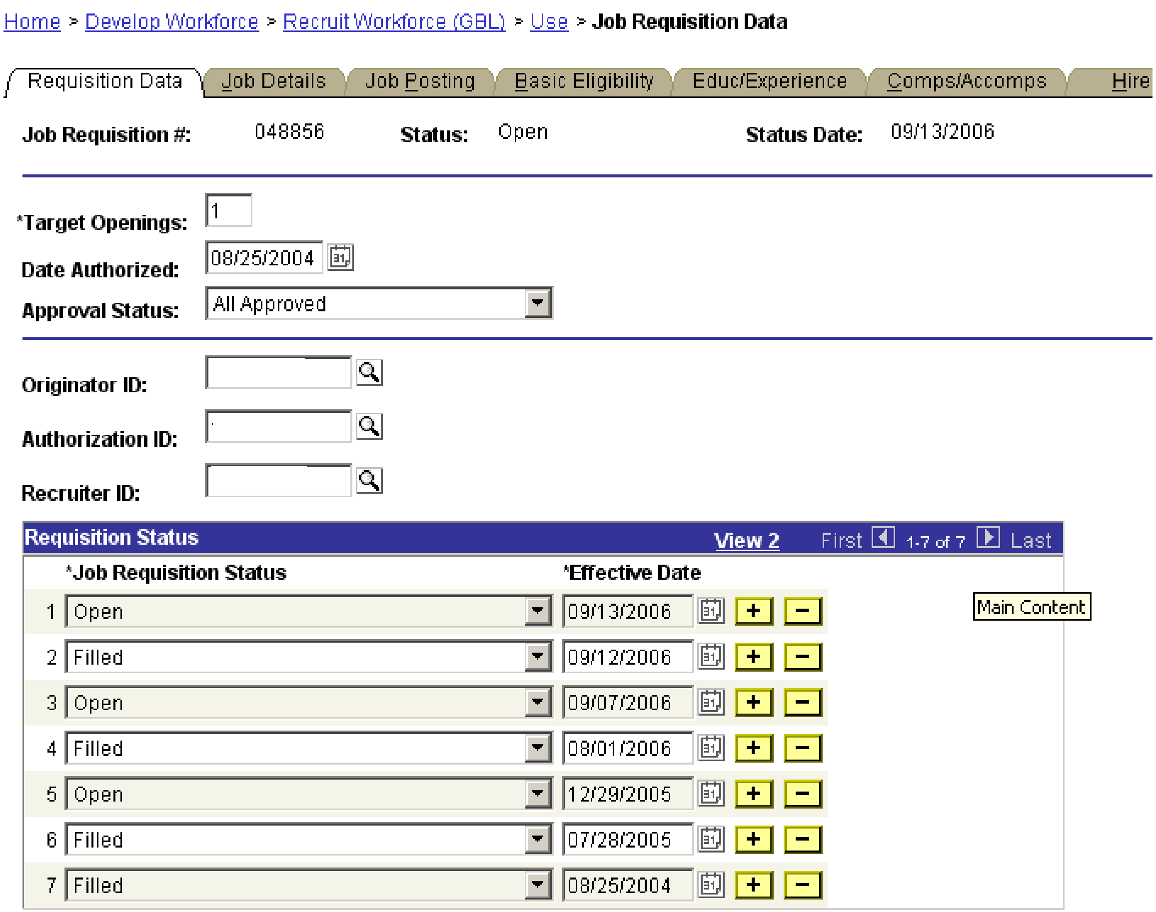
Continued on next page

Common Problems with Rehires, Continued

1. Requisition Numbers (continued)

Step 4. In the above picture, the date auth would be changed to 08/25/2004 the oldest requisition status.

Next, you will need to add a Row in the Job Requisition Status and set it to Open. You want to be sure to set the status date prior to the Hire/Rehire Date (I usually give myself a 30 day buffer in this case I used 09/13/2006). Then click SAVE.



In Review. Notice in the above screen shot, after clicking SAVE, the member's Status in the above left changed from Filled to Open. You may now use req number 048856 in your Hire/Rehire.

Continued on next page

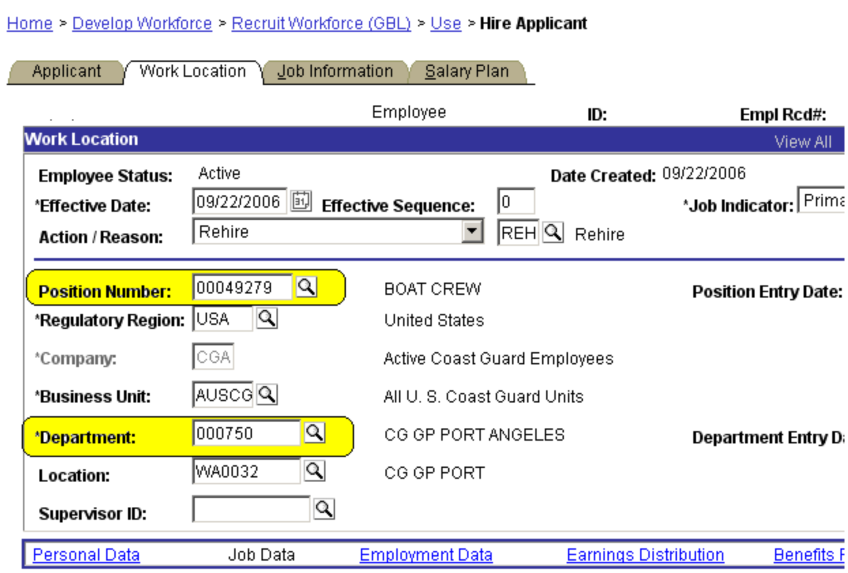
Common Problems with Rehires, Continued

2. TEMDU En route to first PDS

2. The position given is for member's new unit, yet the member still needs to be Hired at the current location. How to do this.

Example. Member is a Reservist integrating into Active duty. Current unit is Sector Houston/Galveston and his new unit is ISC Kodiak. I have the member's new position number of which to be hired to and it is defaulting member's unit to the new position at ISC Kodiak. However, I need to Hire member to this unit, Sector Houston/Galveston, in order to complete member's PCS orders and account for delay enroute.

This happens quite frequently, and you may use the member's new position number as the Hire. However, the department will default to member's position, so the HRS SUP will want to modify the department and position in the Hire Applicant component, specifically the Job Data portion. Please see the below screen shot for where to change. You will want to use member's previous position number from SEC Houston/Galveston of which you can obtain in member's Job Data (NOTE: You will want to use the position on the Job Row prior to the Termination).



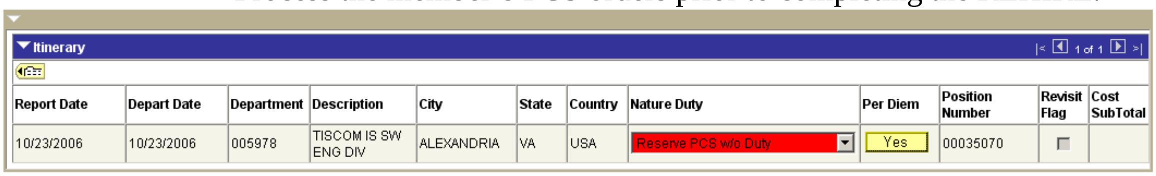
Continued on next page

Common Problems with Rehires, Continued

3. Unable to Process Reporting Endorsement

3. The Rehire is completed and now the member needs to be transferred. The orders show Reserve w/out Duty and I can't report member in.

The PCS orders were issued and Approved by the SPO prior to completing the REHIRE. Therefore, the member's orders defaulted to the member's prior empl class, normally in most cases it's Reserve. The system will not allow you to adjust this, only programming intervention can correct. This is more of a reminder to not Approve or Process the member's PCS orders prior to completing the REHIRE.



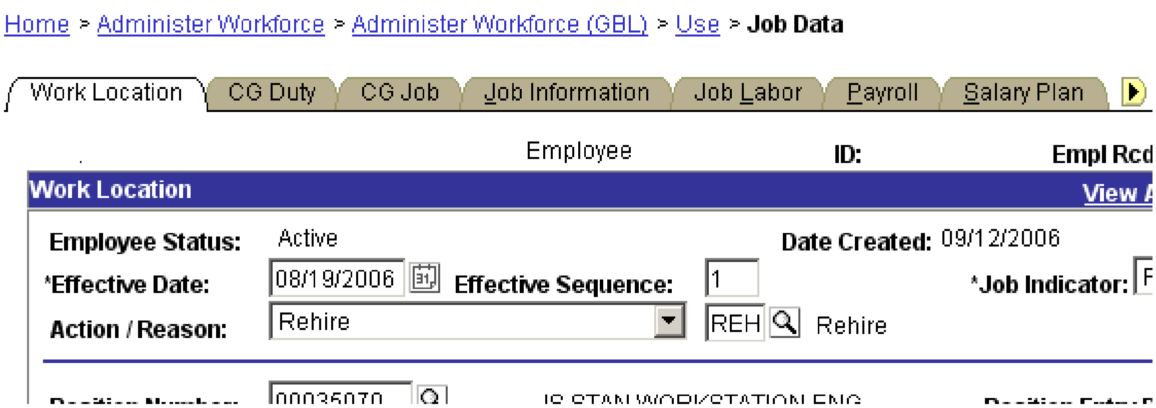
Itinerary — 1 of 1

Report Date	Depart Date	Department	Description	City	State	Country	Nature Duty	Per Diem	Position Number	Revisit Flag	Cost SubTotal
10/23/2006	10/23/2006	005978	TISCOM IS SW ENG DIV	ALEXANDRIA	VA	USA	Reserve PCS w/o Duty	Yes	00035070		

4. Transaction Completed?

4. How to tell if your REHIRE has been completed.

The easiest way to tell if an Accession is complete is through Job Data, look for the "HIRE" or "REHIRE" job row. The below screen shot is an example of what this should look like.



Continued on next page

Common Problems with Rehires, Continued

5. Status is "Terminated" in Job Data

5. The REHIRE has been completed, but member still shows Terminated in Job Data.

You'll want to "View All" under Job Data and ensure your REHIRE was indeed completed. See step 4 on what a REHIRE job row should look like. In most cases, the terminated job row is because the member's transfer was processed out of sequence from the REHIRE. In other words, it was processed prior to the completion of the REHIRE. To fix, you will need to back out the departing/reporting 8c's. SAVE. And then, re-enter the 8c's.

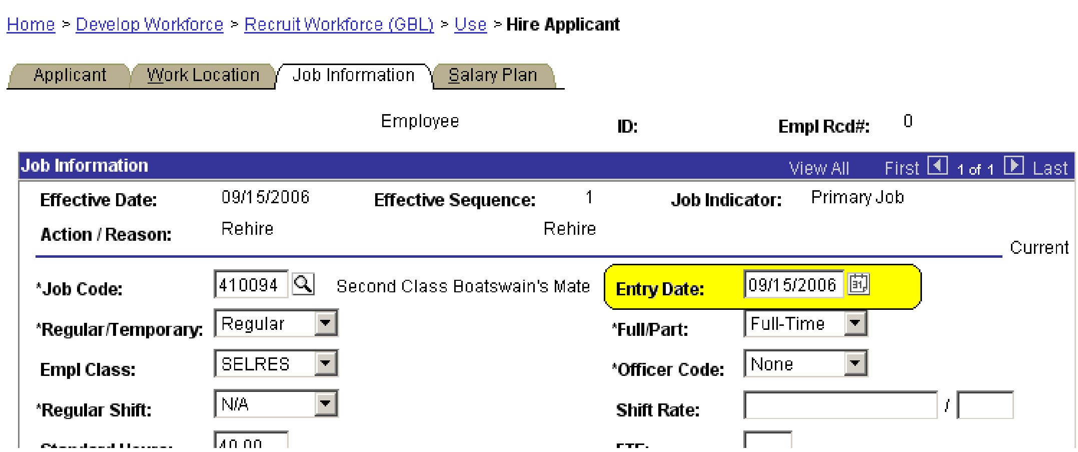
The affect of this will be the removal of the terminated PCS job row and re-insert an active PCS job row.

6. Date of rank

6. Inputting a member's Date of Rank. Where it goes.

A member's Date of Rank is very important. For REHIRES, you should familiarize yourself with the Date of Rank computation. A member's Date of Rank should be inputted in the Job Data portion of the Hire Applicant. There two spots within the Job Data to input this, both of which are show in the below screen shots.

First spot is the Job Information tab of the Job Data in the Hire Applicant portion of the REHIRE. You will input it in the Entry Date box.



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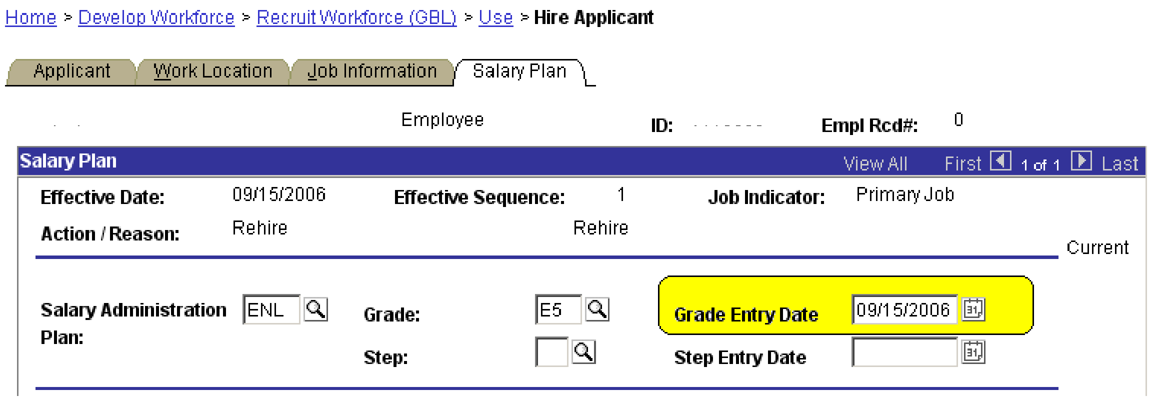
Common Problems with Rehires, Continued

6. Date of rank (continued)

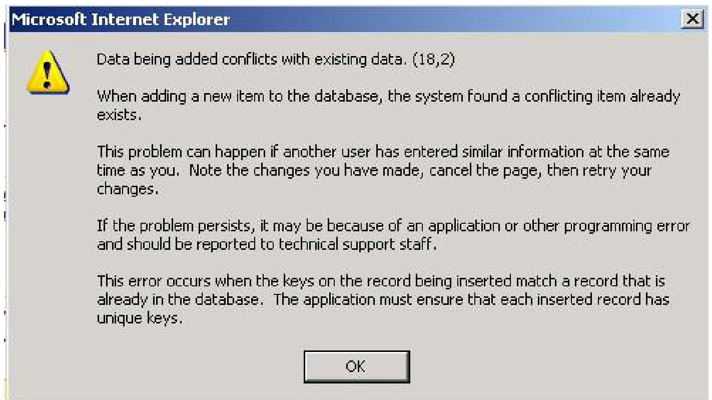
Second spot is the Salary Plan tab of the Job Data in the Hire Applicant portion of the REHIRE. You will input it in the Grade Entry Date box.



Troubleshooting errors while completing the Rehire and Hire process

1. Data Conflicts Error

The below is a screen shot of the error, the most common, and the below instructions and screen shots explain how to troubleshoot the error.



A. For REHIRES, check the Application Status date in relation to member's actual Hire date. The Application Date cannot be later than the Hire date. Contact PPC Customer Care if you run into this problem. The easiest spot to check this is under the Applicant Data component of the REHIRE.

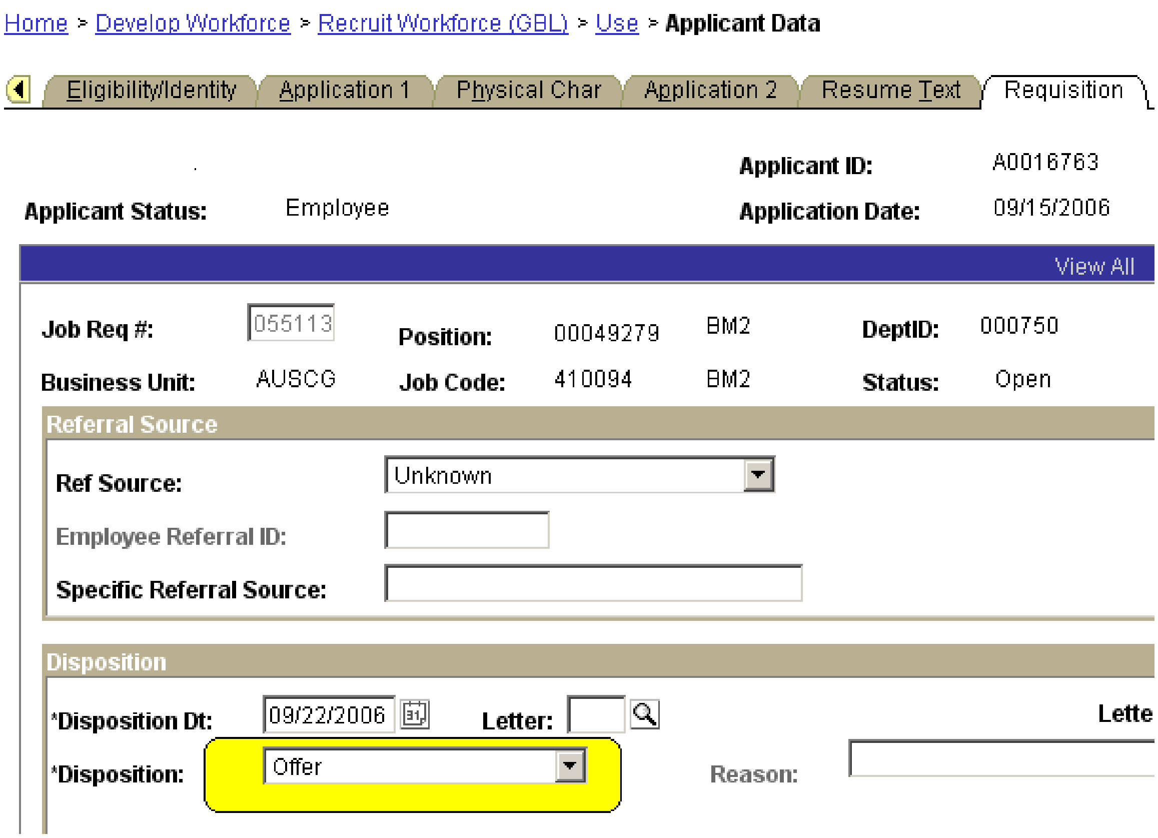
NOTE: in the above picture the Application Date is good.

Continued on next page

Troubleshooting errors while completing the Rehire and Hire process, Continued

1. Data Conflicts Error (continued)

B. Under the Applicant Data component, ensure the Disposition under the Requisition tab shows Offer Accepted, this sometimes gets changed to Offer.



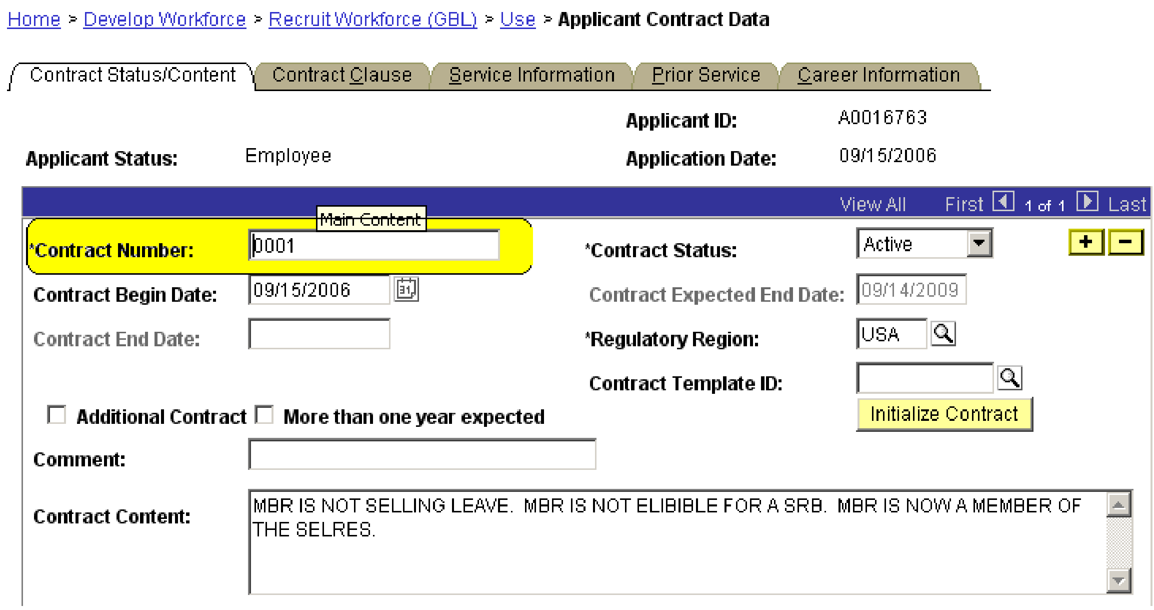
NOTE: In the above picture you will want to adjust the disposition to Offer Accepted.

Continued on next page

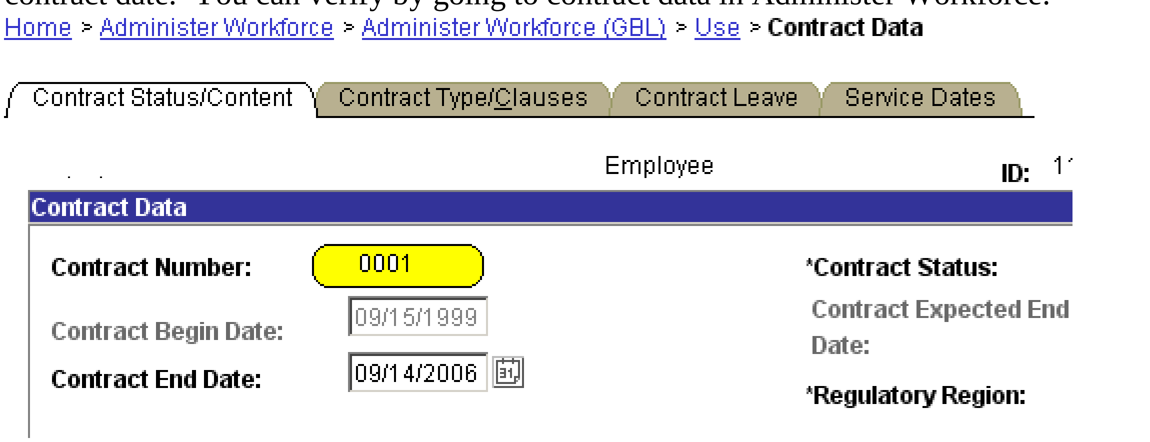
Troubleshooting errors while completing the Rehire and Hire process, Continued

1. Data Conflicts Error (continued)

C. For REHIRES, under the Applicant Contract Data component, ensure the contract number has the correct sequential corresponding contract number.



NOTE: In the above screen shot the contract number should be 002 in the Applicant contract date. You can verify by going to contract data in Administer Workforce:

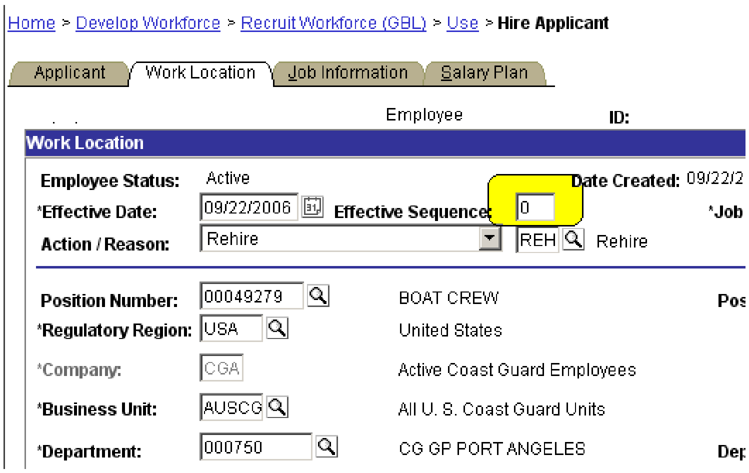


Continued on next page

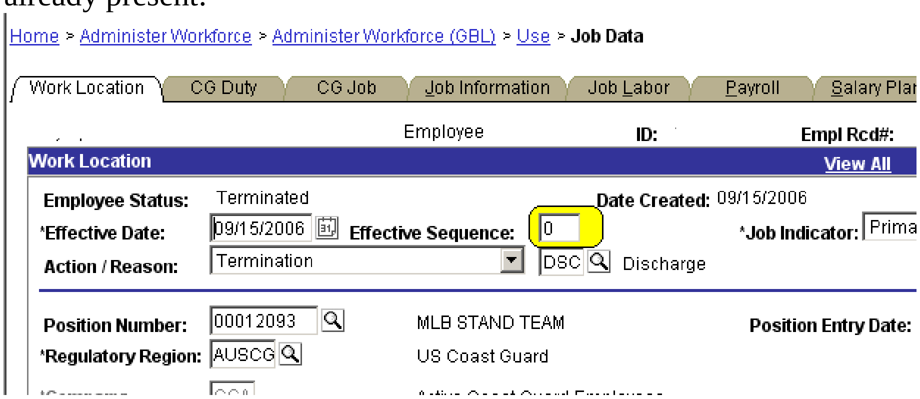
Troubleshooting errors while completing the Rehire and Hire process, Continued

1. Data Conflicts Error (continued)

D. For REHIRES, under the Hire Applicant component, the Job Data portion ensure the job sequence is changed to the next sequential number in member's current Job starting with "0".



NOTE: In the above screen shot the Effective Sequence should be changed to "1". You can verify the correct number by navigating to the member's JOB DATA, a screen shot is provided below (the number 1 will denote the 2nd record in JOB with the same date). Notice the already existing Job Data for this member on the same date, "0" is already present:



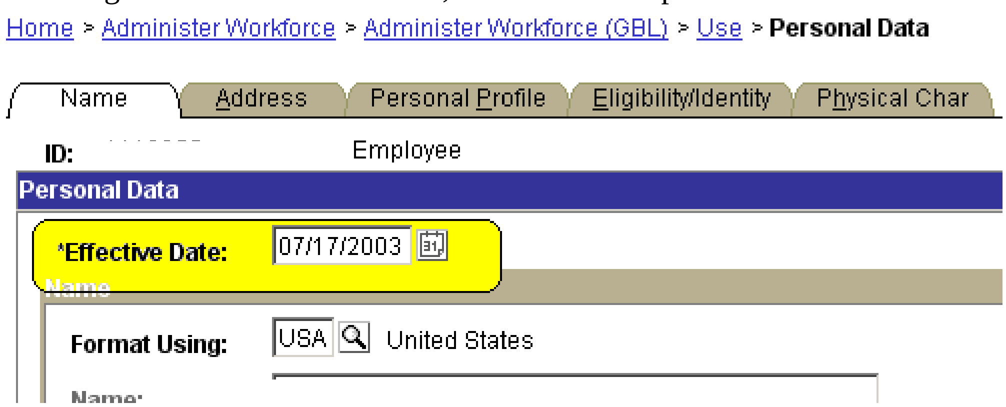
Continued on next page

Troubleshooting errors while completing the Rehire and Hire process, Continued

1. Data Conflicts Error (continued)

E. For REHIRES, under the Hire Applicant component, the Personal Data portion, ensure the member does not have a current Personal Data Effective Date that matches the Hire/Rehire Date.

NOTE: In the above screen shot the member's effective date is fine, you can verify by checking member's Personal Data, a screen shot is provided below:



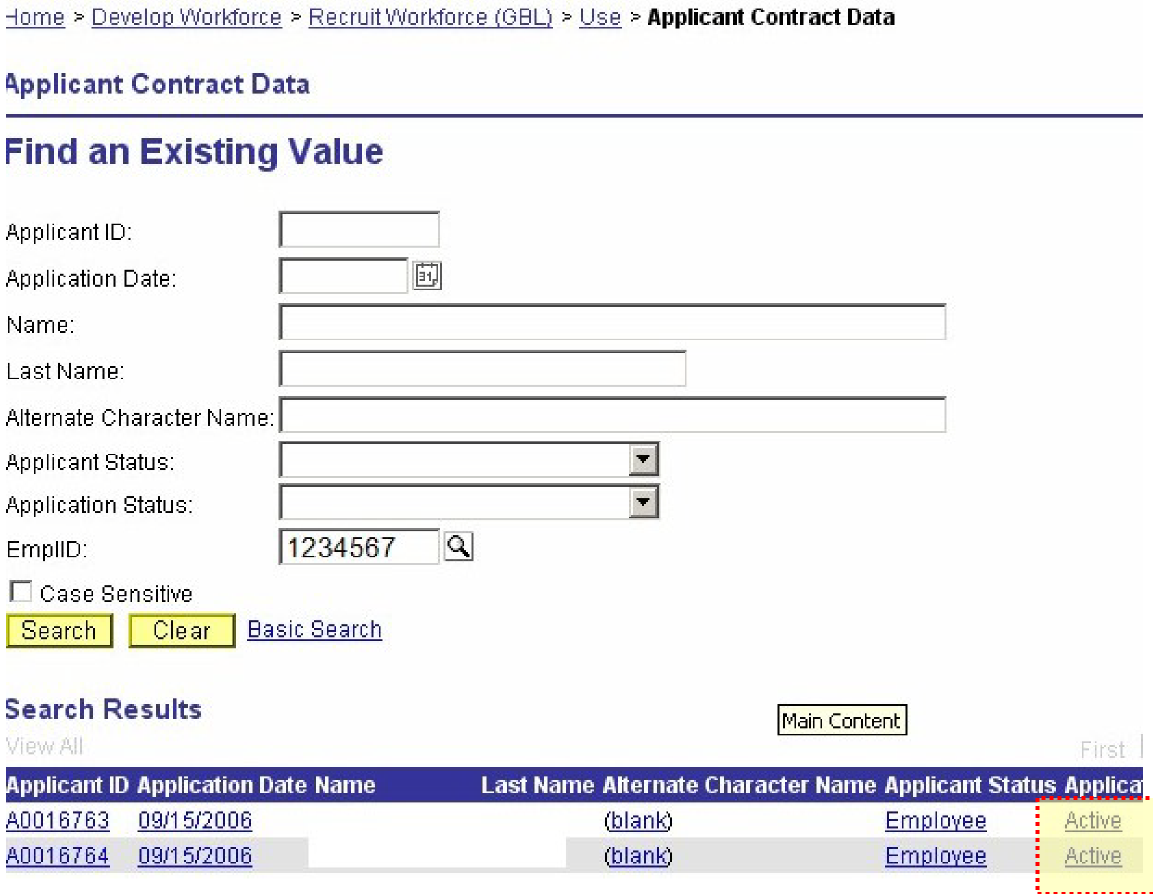
In the event the two dates match, change the member's existing Personal Data to the day prior and SAVE.

Continued on next page

Troubleshooting errors while completing the Rehire and Hire process, Continued

1. Data Conflicts Error (continued)

F. For REHIRES, ensure member does not have 2 active Applicant ID's. To check this, you will want to enter the EMPLID of the member in the Search box for the Applicant Contract Data.



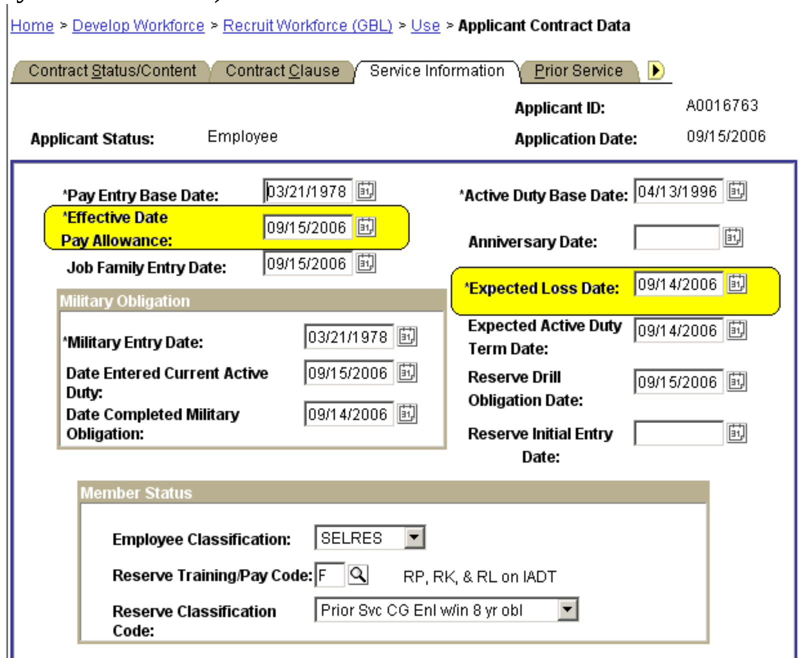
<u>NOTE:</u> In the above screen shot, the member has 2 App ID's both for the same date, both Application Status' show **Active**. One must be removed, only programming intervention can assist. You will want to submit a PPC Customer Care ticket for assistance.

Continued on next page

Troubleshooting errors while completing the Rehire and Hire process, Continued

2. Expected Loss Error.

A. Under the Applicant Contract Data component, check the Service Information tab, checking the Effective Date of pay and allowances (needs to be same date as the REHIRE) and Expected Loss Date (date needs to be the date of Hire plus contract term, unless member is a new service member under initial obligated service, which is 8 years for any new member.)

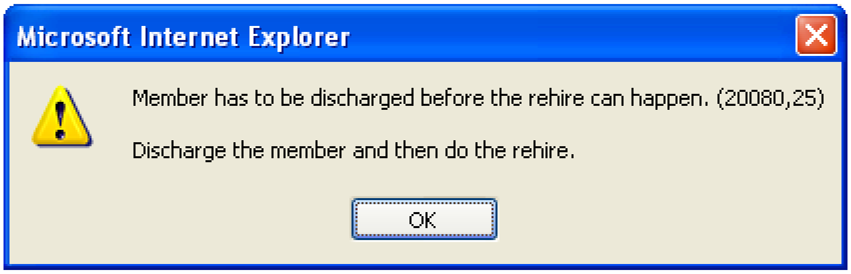


<u>NOTE:</u> In the above picture the Expected Loss is incorrect and should be 09/14/2009. Member's contract was for 09/15/2006 for 03 years. Member had already completed initial obligated service, and contract goes beyond it. Therefore, Exp Loss should be expected contract end date.

Continued on next page

Troubleshooting errors while completing the Rehire and Hire process, Continued

3. Member must be Discharged Error (For REHIRES)



A. Check the separations component to see if the discharge status has been set to "Approved".

4. No Matching Values error when entering Applicant ID in Hire Applicant

If you receive an "Invalid ID/No Matching Values found" error message, when trying to add an applicant ID in the Hire Applicant component, go back through the applicant data sections and ensure all the steps were completed (Contract Data, Identification Data, Citizenship, etc.). If you are not able to save the Applicant Contract data, clear all the fields on the Career Information tab with the exception of the Job Code.

Rehire/Hire Checklist

A checklist designed to help assist you with your Hire/REHIRE.

_______ Organize Accession documents and create PDR, IAW PDR instruction

_______ Print Orders out of Direct Access or Use member's hardcopy (For REHIRES do NOT approve the Orders in DA yet).

_______ For REHIRES, Print off Service Dates from the SOCS page

_______ For REHIRES, complete the Discharge

_______ Complete Hire/Rehire documents

_______ For REHIRES, approve orders in Direct Access (*Note: You must complete the Hire Applicant step before you endorse the orders!*)

_______ Complete Direct Deposit and, if applicable, Allotment(s).

_______ Complete Tax Info (State and Federal Income Tax Withholding)

_______ Complete Entitlements

_______ Complete SGLI/FSGLI Elections

_______ Submit request for Statement of Credible Service (SOCS)
NOTE: This is for ALL prior Service personnel regardless of DD214 present or not. Remember if member is supposed to be O1E, you can request interim pay adjustment. For consecutive active duty with no break, remember you can request Leave carryover from prior service/component.

_______ Enter ASVAB scores for member in Direct Access Test Results.
NOTE: If ASVAB scores not present request a copy from CG Institute

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Enclosure (4)
Case Studies

Overview

Introduction

This section provides examples of unique accession situations taken from real-life scenarios.

In this enclosure

The following scenarios are presented in this enclosure.

Reservist Enlisting in the Regular Coast Guard

Introduction

In this scenario, an enlisted Reservist was authorized to enlist in the regular Coast Guard.

Definition

This scenario is an example of a "Reserve Integration".

Process Overview

This is a review of the events and actions that were needed to successfully process this integration. Some of the stages reference exhibits, which appear later in this enclosure. The exhibits are examples of messages, forms and Direct-Access data entry completed in connection with this integration.

Stage	Description	Exhibit
1	Member submitted request on form CG-3472. In this scenario the member applied IAW ALCOAST 080/02 "Reserve Enlisted Active Duty Integration Opportunity". This program was to end in 2002, however, it is still in use. If the member wasn't already on EAD, he could have applied under the provisions of 2.D.3.f. of the Recruiting Manual (Open Rate List).	**1 & 2**
2	Unit CO endorsed request and forwarded to CGPSC (epm-1)	**2**
3	CGPSC reviewed and approved request. Issued message.	**3**
4	Unit administrative staff counseled member on	
	1. Length of Enlistment Options (3, 4, 5 or 6 years IAW PERSMAN 1.G.2.A).	
	2. **SRB** (Unit prepared CG-3307 entry "SRB-1" for member's acknowledgement, if member meets the requirements for a zone A or zone B SRB (e.g. Has the member completed 17 months continuous active duty (including extended active duty as a Reserve) at any point in their military career? The 17 months continuous active duty need not have been completed immediately prior to the enlistment.). • In our scenario the member was just completing 24 months of EAD, so he met the active duty requirement for an SRB. • Also, the member was a BM2 with a coxswain competency code, this increased his SRB multiple by one-half a point.	**4**
	3. **MGIB** program (Unit prepared DD form 2366 for member's acknowledgment as required by the approval message). (http://www.dtic.mil/whs/directives/infomgt/forms/eforms/dd2366.pdf) (http://cgweb2.comdt.uscg.mil/CGDIRECTIVES/CI/CI_1760_9A.pdf)	**5**

Continued on next page

Reservist Enlisting in the Regular Coast Guard, Continued

Process Overview

Stage	Description	Exhibit
5	Member completed Career Intentions Worksheet (CIW), CG-2045. http://www.uscg.mil/ppc/forms/.	**6**
6	Unit CO endorsed CIW and the unit admin forwarded it to the SPO along with the CG-3307 entry and a copy of the DD-2366 (the original was sent to CGPSC (epm-1) IAW the enlistment authorization message).	
7	SPO entered a Statement of Intent transaction in Direct-Access	**7**
8	SPO prepared an Enlistment Contract, DD Form-4/1 from: http://www.dtic.mil/whs/directives/infomgt/forms/eforms/dd0004.pdf (Note: DA Cannot be used to prepare printable enlistment contracts) and sent to unit for completion of the Certification of Acceptance and Confirmation of Enlistment.	**8**
9	SPO entered preliminary information in DA for the discharge and rehire transactions. This included: • Creating a Job Requisition Number • Creating an Applicant ID Number • Entering the Discharge (*but not approving it yet*, if the member did not enlist in the Coast Guard, the discharge could have been changed to a release from active duty to transfer the member back to the SELRES upon completion of his EAD contract.) • Completing the Applicant Contract Data (which required the SPO to compute the member's date of rank, active duty base date, pay base date etc.)	**9**
10	Unit administered enlistment oath on day of enlistment. The member and the officer administering the oath signed the contract and the form was returned to the SPO. The unit also faxed a copy of the signed contract back to the SPO, so they could complete the pay transactions on time.	
11	When the SPO had confirmation that the member executed the oath of enlistment, they entered final approval on the member's discharge and rehire transactions in Direct-Access. The also restarted BAH, CCOLA and BAS as these entitlements were stopped as part of the discharge process.	**9**
12	PPC (MAS) computed the member's SRB entitlement	

Exhibit 1 - Program Guidance

Description

This exhibit shows the ALCOAST message announcing the *Reserve Enlisted Active Duty Integration Opportunity* program. It was important to look up this reference because it provided important information about setting the member's date of rank (see para. 5).

```
R 211643Z FEB 02 ZUI ASN-A00052000043 ZOJ1
FM COMDT COGARD WASHINGTON DC//G-W//
TO ALCOAST
BT
UNCLAS //N01100// VOL CCN
ALCOAST 080/02
COMDTNOTE 1100
SUBJ: RESERVE ENLISTED ACTIVE DUTY INTEGRATION OPPORTUNITY
A. COMDT COGARD WASHINGTON DC 241503Z OCT 01, ALCOAST 483/01
B. PERSONNEL MANUAL, COMDTINST M1000.6A
C. RECRUITING MANUAL, COMDTINST M1100.2C
D. MEDICAL MANUAL, COMDTINST M6001.C
E. RECALL OF ENLISTED RESERVISTS TO EXTENDED ACTIVE DUTY, COMDTINST 1141.3B
F. MONTGOMERY G.I. BILL (MGIB), SELECTED RESERVE EDUCATION
ASSISTANCE PROGRAM, COMDINST 1001.30 (SERIES)
G. MONTGOMERY G.I. BILL (MGIB), ACTIVE DUTY EDUCATION ASSISTANCE PROGRAM, COMDINST
1760.9 (SERIES)
1. THE COAST GUARD HAS AN IMMEDIATE NEED TO GROW ITS ENLISTED WORKFORCE TO MEET THE
CHALLENGES ASSOCIATED WITH HOMELAND SECURITY. REF (A) ANNOUNCED VARIOUS ACTIONS TO
FILL OUR IMMEDIATE AND LONG-TERM PERSONNEL NEEDS.  THIS ALCOAST ANNOUNCES THE
IMPLEMENTATION OF ONE OF THOSE ACTIONS:  THE OPPORTUNITY FOR RESERVE MEMBERS CURRENTLY
SERVING ON ACTIVE DUTY TO BE CONSIDERED FOR IMMEDIATE INTEGRATION INTO THE REGULAR
COAST GUARD.   THIS OFFER WILL TERMINATE ON 30 SEP 2002, OR EARLIER, IF RATINGS ARE
FILLED. FUTURE SOLICITATIONS FOR RESERVISTS SERVING ON ACTIVE DUTY AND/OR SELRES WILL
BE ANNOUNCED VIA SEPARATE CORRESPONDENCE, BASED ON THE WORKFORCE NEEDS OF THE SERVICE.
2. APPLICATIONS FOR INTEGRATION WILL BE CONSIDERED FROM ENLISTED RESERVISTS WHO ARE
CURRENTLY SERVING ON EXTENDED ACTIVE DUTY (EAD) OR WHO WERE CALLED UP DURING THE
RECENT MOBILIZATION EFFORT AND MEET THE FOLLOWING:
   A. ARE SERVING IN ONE OF THE FOLLOWING RATES:  BM1, BM2, BM3,
EM1, EM2, EM3, ET2, ET3, FS1, FS2, FS3, FT2, FT3, GM2, GM3, MK2,
MK3, QM1, QM2, QM3, RD2, RD3, TC2, TC3, TT2, TT3.  (APPLICATIONS WILL BE CONSIDERED
FROM OTHER RATINGS ON A CASE BY CASE BASIS. THIS INCLUDES RESERVISTS SERVING IN
EMERGENCY RATINGS (I.E., PS, IV) AND OTHERS WITH SPECIALTY SKILLS OUTSIDE THEIR RATING
(E.G., A COXSWAIN QUALIFIED YN).  ALSO, APPLICATIONS WILL BE CONSIDERED FROM MEMBERS
IN HIGHER PAY GRADES, WHO MEET SPECIFIC SERVICE NEEDS, ON A CASE BY CASE BASIS.)
   B. HAVE LESS THAN 11 YEARS ACTIVE SERVICE.
```

Continued on next page

Exhibit 1 - Program Guidance, Continued

3. APPLICATIONS FOR INTEGRATION MUST BE SUBMITTED USING A REQUEST FOR EXTENDED ACTIVE DUTY, FORM CG-3472. IN THE BLOCK "REASON FOR REQUEST" ENTER:
   A. REQUEST TO INTEGRATE INTO THE REGULAR COAST GUARD.
   B. ASSIGNMENT OR GEOGRAPHIC PREFERENCE.
   C. A DAYTIME TELEPHONE NUMBER FOR ASSIGNMENT OFFICER USE.
   D. A STATEMENT ACKNOWLEDGING THE IMPACT OF INTEGRATION ON MONTGOMERY G.I. BILL (MGIB) ENTITLEMENTS.
FORM CG-3472 MUST BE ENDORSED BY THE MEMBERS COMMANDING OFFICER, AND A COPY OF FORM CG-3472 MUST BE SENT TO THE SERVICING PERSRU AND ISC (PF).
4. SUBMISSION OF AN APPLICATION IS NOT A GUARANTEE THAT THE MEMBER WILL BE INTEGRATED. SERVICE NEED, MEMBER QUALIFICATIONS AND PERFORMANCE WILL BE USED TO DETERMINE WHICH PERSONNEL ARE OFFERED INTEGRATION.
5. ENLISTED RESERVISTS WHO ARE APPROVED FOR INTEGRATION MUST PARTICIPATE IN THE ACTIVE DUTY SERVICEWIDE EXAM (SWE) COMPETITION FOR FUTURE ADVANCEMENTS. AS AN INCENTIVE FOR THIS OFFERING, PROVISIONS OF REF B ARE AMENDED AS FOLLOWS:
   A. ARTICLE 5.C.3.B. IS AMENDED TO APPLY ALL RESERVE TIME IN PAY GRADE IN PRESENT RATING (TIR) TO ACTIVE DUTY TIR AS CREDIT TOWARD THE FINAL MULTIPLE CALCULATION. SINCE ARTICLE 5.C.14.B DOES NOT NORMALLY PROVIDE FOR A TRANSFER OF RESERVE TIR WHEN A RESERVIST SERVES ON ACTIVE DUTY VIA OTHER PROGRAMS, THIS CHANGE WILL ALLOW MEMBERS TO RECEIVE FULL CREDIT FOR RESERVE AND REGULAR TIR TOWARD THEIR FINAL MULTIPLE CALCULATION FOR ADVANCEMENT.
   B. THE MEMBERS COMMANDING OFFICER MAY CONSIDER PREVIOUS ENLISTED EVALUATIONS (IN CURRENT PAY GRADE) AND CONDUCT A SPECIAL EVALUATION IN ACCORDANCE WITH ARTICLE 5.C.6.C. FOR THE PURPOSE OF QUALIFYING A MEMBER FOR THE SWE COMPETITION. ARTICLE 5.C.6.B. ESTABLISHES THE STANDARD TIME PERIOD FOR WHICH ENLISTED PERFORMANCE IN A PAY GRADE WILL BE CONSIDERED IN DEVELOPING THE PERFORMANCE FACTOR QUALIFYING A MEMBER FOR SWE COMPETITION. THIS GUIDANCE BALANCES THE NEED FOR COMMANDING OFFICERS TO DIRECTLY OBSERVE MEMBERS UNDER THEIR COMMAND WHO DESIRE TO PARTICIPATE IN THE SERVICEWIDE WHILE ENCOURAGING THE USE OF A SPECIAL EVALUATION FOR MEMBERS WHOSE DUTY AND PERFORMANCE MERITS SUCH CONSIDERATION.
   C. ARTICLE 5.C.14.A IS AMENDED TO CREDIT MEMBERS WITH THEIR RESERVE TIR FOR ELIGIBILITY TO ADVANCE.
6. RESERVISTS WHO INTEGRATE INTO THE REGULAR COAST GUARD WILL BE REMOVED FROM THE RESERVE ADVANCEMENT LIST EFFECTIVE UPON THEIR INTEGRATION.
7. CGPSC (EPM) WILL IDENTIFY ACTIVE DUTY POSITIONS AVAILABLE TO QUALIFYING RESERVISTS. APPLICANTS MUST BE AVAILABLE FOR WORLDWIDE ASSIGNMENT IN DUTIES OF THE POSITION THEY ARE FILLING, INCLUDING SEA AND ISOLATED DUTY, BASED ON THE NEEDS OF THE SERVICE. INTERESTED MEMBERS MAY CONTACT CGPSC (EPM-2) TO DISCUSS ASSIGNMENT OPPORTUNITIES.

Continued on next page

Exhibit 1 - Program Guidance, Continued

8. CGPSC-EPM WILL REVIEW ALL REQUESTS FOR INTEGRATION. UPON APPROVAL, CGPSC(EPM) WILL: (1) NOTIFY MEMBERS BY MESSAGE, (2) AUTHORIZE THE MEMBER TO ENLIST/REENLIST INTO THE REGULAR COAST GUARD FOR A PERIOD OF 4 YEARS AND (3) TRANSMIT PCS ORDERS CONDITIONAL TO EXECUTION OF AN ENLISTMENT/REENLISTMENT CONTRACT. SERVICING PERSRU MUST ENSURE THAT A CURRENT APPROVED PHYSICAL EXAMINATION IS ON FILE BEFORE THE MEMBER IS INTEGRATED. APPLICANTS MUST MEET PHYSICAL STANDARDS FOR ACTIVE DUTY SERVICE IAW ARTICLE 3-C-10 OF REF C AND REF D.
9. IF SELECTED FOR INTEGRATION, ENLISTED RESERVISTS CURRENTLY MOBILIZED WILL NOT BE ALLOWED TO INTEGRATE UNTIL THEIR SERVICES ARE NO LONGER REQUIRED OR A REPLACEMENT IS MOBILIZED.
10. RESERVISTS ARE ENCOURAGED TO REVIEW REFS (E) THROUGH (G), WHICH ADDRESS MONTGOMERY G. I. BILL (MGIB) EDUCATIONAL BENEFITS.
11. FOR VACANT POSITION OPPORTUNITIES PLEASE CONTACT THE APPROPRIATE ASSIGNMENT OFFICER USING THE CGPSC-EPM TELEPHONE DIRECTORY LINK AVAILABLE AT THE FOLLOWING WEBSITE:WWW.USCG.MIL/HQ/CGPSC/EPM/DEFAULT.HTML. FOR THOSE WHO DO NOT HAVE ACCESS TO THE INTERNET, PLEASE CALL CGPSC-EPM AT (202)267-1041.
12. INTERNET RELEASE AUTHORIZED.
13. RADM F. L. AMES, ASSISTANT COMMANDANT FOR HUMAN RESOURCES, SENDS.

Exhibit 2 – Member's Application

Description

This exhibit shows the member's completed CG-3472. Although this form is titled "*Request for Extended Active Duty*", it can be used to submit integration requests per ALCOAST 080/02. Note how the member used the "Summary of Military Service…" section to list his Reserve active duty history, this is to show that he is currently on active duty and is eligible for the program.

U.S. DEPARTMENT OF HOMELAND SECURITY
U.S. COAST GUARD
CG-3472 (Rev. 6-04)

REQUEST FOR EXTENDED ACTIVE DUTY

NOTE: Submit in duplicate through official channels

LAST NAME - FIRST NAME - MIDDLE INITIAL	SSN	RATE
Ricardo, Ricky, Lee	123-45-6789	BM2

NAME AND LOCATION OF ORGANIZED UNIT TO WHICH ATTACHED (if applicable)

Commanding Officer
U. S. Coast Guard
Some Kind of Unit or Cutter
123 Any Street
San Diego, CA 98124

DATE OF CURRENT ENLISTMENT: 20 JUN 2000

DATE ASSIGNED TO ORGANIZED UNIT: 18 AUG 2000

1. I hereby request active service and training pursuant to Section 4(c)(2) of the Universal Military Training and Service Act for a period of 24 months unless sooner released by the Commandant of the Coast Guard. To commence 30 SEP 06, 30 OCT 06, or 30 NOV 06.
2. It is understood that acceptance of this application will create a binding agreement on my part to serve 24 months on extended active duty in the Coast Guard unless sooner released by the Commandant.
3. If necessary, I agree to extend my enlistment in the Coast Guard Reserve for one or two full years in order to allow an active duty period of 24 months.
4. I understand that, in order to be considered for assignment to advanced training, I may have to extend my period of active duty service in order to comply with the provisions of current instructions.

REASON FOR REQUEST

A. REQUEST TO INTEGRATE INTO THE REGULAR COAST GUARD.
B. ASSIGNMENT OR GEOGRAPHIC PREFERENCE - A unit in Sector San Diego.
C. A DAYTIME TELEPHONE NUMBER: 619-555-1212
D. I am not a participant in SELRES MGIB program.

SUMMARY OF MILITARY SERVICE PRIOR TO CURRENT ENLISTMENT (If none, so state)

ACTIVE SERVICE			INACTIVE SERVICE		
BRANCH OF SERVICE	FROM (Mo-day-yr)	TO (Mo-day-yr)	BRANCH OF SERVICE	FROM (Mo-day-yr)	TO (Mo-day-yr)
USCGR (Title 10)&(EAD)	07/19/04	Current			
USCGR (Title 10)	02/10/2003	01/25/2004			
USCGR (ADSW-AC)	10/14/2001	12/19/2001			

DATE	SIGNATURE
06 September 2006	

FIRST ENDORSEMENT

From: Commanding Officer, CG Unit San Diego.

Forwarded recommending approval. BM2 Ricardo has been an asset to this unit since being recalled to Active Duty and volunteering for Extended Active Duty. If this request is approved, request BM2 Ricardo be assigned to this unit to fill current billet.

06 September 2006, R.A.JONES,LCDR,USCG

Exhibit 3 – Approval Message

Discussion

This exhibit shows CGPSC's approval of the request. It provides several important pieces of information:

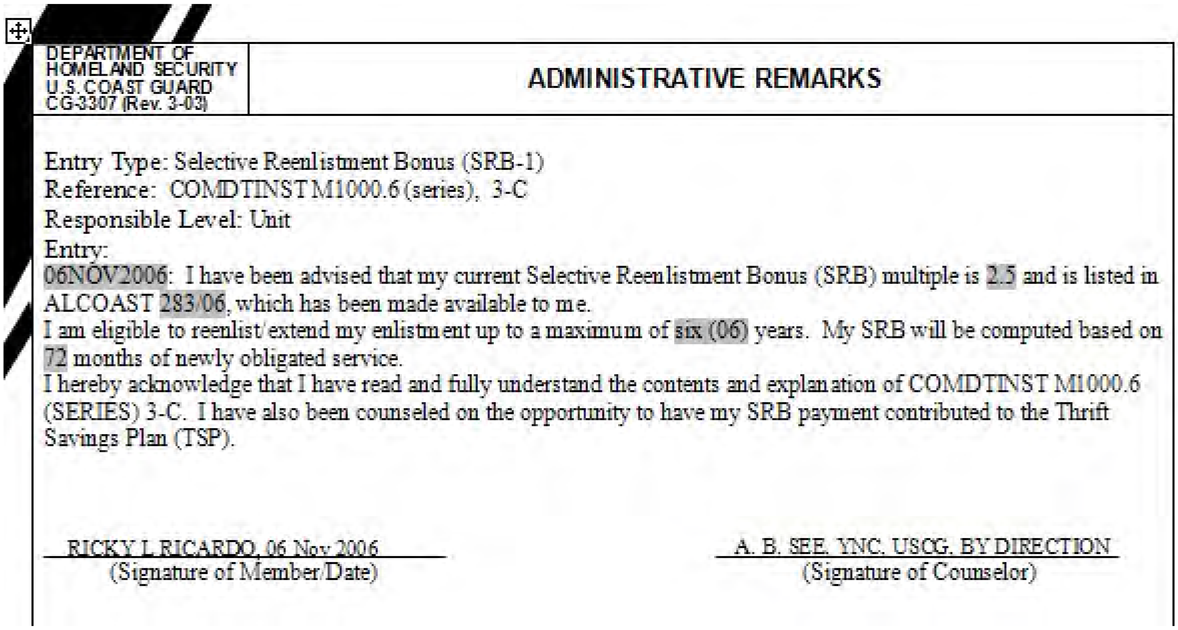
1. Authority/Program for the enlistment
2. Date of discharge/enlistment
3. Rate authorized for enlistment
4. Allows member to select number of years
5. Member's assignment

FM COMCOGARD PERSCOM ARLINGTON VA//EPM-1/EPM-2//
TO COGARD MSST 91109 SAN DIEGO CA
INFO COGARD PPC TOPEKA KS//MAS//
COMCOGARD PERSCOM ARLINGTON VA//RPM-2//
COMDT COGARD WASHINGTON DC//CG-12A/CG-101//
COGARD INTSUPRTCOM ALAMEDA CA//PF//
COMCOGARD SECTOR SAN DIEGO CA//SPO//
UNCLAS //N01430//
SUBJ: ENLISTMENT IN THE REGULAR COAST GUARD OF BM2 RICKY L. RICARDO 1234567, USCGR
A. BM2 RICARDO'S CG-3472 OF 6 SEP 06
B. **COMDT COGARD WASHINGTON DC 211643Z FEB 02, ALCOAST 080/02**
C. MONTGOMERY G.I. BILL (MGIB) - ACTIVE DUTY EDUCATION ASSISTANCE PROGRAM, COMDTINST 1760.1
1. IN REF A, BM2 RICARDO REQUESTED TO ENLIST IN THE REGULAR COAST GUARD. AUTHORITY IS GRANTED TO DISCH SNM FROM USCGR AND ENL BM2 RICARDO IN THE REGULAR COAST GUARD ON **30 NOV 06** AS A **BM2** FOR A **TERM OF ENLISTMENT AS PROVIDED FOR IN ART 1.G.2.A OF THE PERSMAN** AND PROVIDED BM2 RICARDO IS FULLY QUALIFIED.
2. BM2 RICARDO MUST MEET THE PHYSICAL STANDARDS FOR ACTIVE DUTY.
3. BM2 RICARDO WILL REMAIN AT HIS **CURRENT UNT IN POSN NBR 0073832.**
4. IF BM2 RICARDO DECLINES THIS ENLISTMENT OPPORTUNITY, CGPSC-EPM-1 MUST BE NOTIFIED ASAP BY THE MOST EXPEDITE MEANS.
5. ENSURE BM2 RICARDO IS COUNSELED ON THE PROVISIONS OF SRB ELIGIBILITY AND APPROPRIATE SERVICE RECORD DOCUMENTATION PREPARED. PAY PARTICULAR ATTENTION TO CONTINUOUS ACTIVE SERVICE REQUIREMENTS AND ACTIVE DUTY BASE DATE WHEN ESTABLISHING SRB ELIGIBILITY DETERMINATIONS. SRB ELIGIBILITY IN QUESTIONABLE CASES SHOULD BE VERIFIED WITH THE SERVICING PERSONNEL OFFICE AND PPC AS NECESSARY.
6. THIS ENLISTMENT IN THE REGULAR COAST GUARD MAY ENTITLE BM2 RICARDO TO PARTICIPATE IN THE MGIB EDUCATION ASSISTANCE PROGRAM. PLEASE ENSURE THAT A COPY OF REF C, WHICH IS AVAILABLE ON THE WEB AT HTTP://WWW.USCG.MIL/CCS/CIT/CIM/DIRECTIVES/CI.HTML, IS PROVIDED TO BM2 RICARDO AND THAT BM2 RICARDO IS COUNSELED THAT A DECISION TO PARTICIPATE OR NOT TO PARTICIPATE MUST BE MADE WITHIN THE FIRST TWO WEEKS AFTER THIS ENLISTMENT. IN ADDITION, ENSURE BM2 RICARDO UNDERSTANDS THAT FAILURE TO MAKE THIS DECISION WITHIN THE REQUIRED TIME FRAME WILL RESULT IN AUTOMATIC PARTICIPATION, IF ELIGIBLE, THRU PAYROLL REDUCTION. THE MONTGOMERY G.I. BILL ACT OF 1984 (MGIB) - BASIC ENROLLMENT FORM, DD FORM 2366, WILL NEED TO BE COMPLETED AND MAILED TO CGPSC-EPM-1 BY BM2 RICARDO. THIS DD FORM 2366 IS AVAILABLE ON THE WEB AT HTTP://WWW.USCG.MIL/CCS/CIT/CIM/FORMS/FORMMGMT.HTM.
7. A COPY OF THIS MSG SHALL BE GIVEN TO SNM AND A COPY PLACED IN BM2 RICARDO'S PDR.
8. POC FOR THIS INTEGRATION IS MR. DEZI ARNEZ AT 202-493-0000.
POC FOR MGIB IS MCPO MERTZ AT 202-493-1111.

Exhibit 4 – Selective Reenlistment Bonus Page 7

Description

This exhibit shows the CG-3307 entry that was completed to show the member was counseled on his SRB entitlement.


DEPARTMENT OF HOMELAND SECURITY
U.S. COAST GUARD
CG-3307 (Rev. 3-03)

ADMINISTRATIVE REMARKS

Entry Type: Selective Reenlistment Bonus (SRB-1)
Reference: COMDTINST M1000.6 (series), 3-C
Responsible Level: Unit
Entry:
06NOV2006: I have been advised that my current Selective Reenlistment Bonus (SRB) multiple is 2.5 and is listed in ALCOAST 283/06, which has been made available to me.
I am eligible to reenlist/extend my enlistment up to a maximum of six (06) years. My SRB will be computed based on 72 months of newly obligated service.
I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (SERIES) 3-C. I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

RICKY L RICARDO, 06 Nov 2006
(Signature of Member/Date)

A. B. SEE. YNC. USCG. BY DIRECTION
(Signature of Counselor)

Exhibit 5 – MGIB Counseling

Description

Per the enlistment authorization message, the member must be counseled on the MGIB program and informed that he can elect to not enroll. The member did not complete Section 5 – Statement of Disenrollment, so he will automatically be enrolled. The form must be sent to CGPSC (epm-1) per Para. 6 of the message.

1. SERVICE MEMBER DATA

a. NAME (*LAST, First, Middle Initial*)	b. SOCIAL SECURITY NUMBER (SSN)
Ricardo, Ricky, Lee	123-45-6789

2. STATEMENT OF UNDERSTANDING FOR INELIGIBLE MEMBERS

I am **NOT** eligible for the MGIB because (a) I am a service academy graduate, or (b) I am an ROTC scholarship graduate who received more than the current minimum amount allowed for enrollment in MGIB, or (c) I am a prior service member who disenrolled during my previous term of active duty.

a. SERVICE MEMBER SIGNATURE	b. RANK/GRADE	c. DATE SIGNED (*YYYYMMDD*)

3. STATEMENT OF UNDERSTANDING FOR ALL ELIGIBLE MEMBERS

(1) I am automatically enrolled unless I exercise the option to **DISENROLL** by signing item 5 below.

(2) **UNLESS I DISENROLL** from the MGIB, my basic pay will be reduced $100 per month, or the current monthly rate until $1,200 has been deducted; this basic pay reduction **CANNOT** be **REFUNDED, SUSPENDED OR STOPPED**, this is an **IRREVOCABLE DECISION.**

(3) I must complete 36 months of active duty service (24 months if my enlistment is for less than 36 months) before I am entitled to the current rate of monthly benefits. The MGIB provides benefits for a period of 36 months.

(4) I understand I am eligible for an increased monthly benefit by contributing an additional amount, not to exceed $600 while on active duty. Once I separate, I cannot contribute.

(5) I must receive an **HONORABLE** discharge for service establishing entitlement to the MGIB. This **DOES NOT** include "under honorable conditions".

(6) I must complete the requirements of a secondary school diploma or equivalency certification, or successfully complete the equivalent of 12 semester hours in a program of education leading to a standard college degree before applying for benefits with the Department of Veterans' Affairs.

(7) I have 10 years from date of last discharge from active duty to use MGIB benefits.

(8) If I die while on active duty, or within one year after discharge or release from active duty if service related, my designated beneficiary(ies) will receive the unused balance of the money reduced from my basic pay for the MGIB. This death benefit will be paid by the Department of Veterans' Affairs (DVA).

(9) I cannot receive any combination of DVA educational benefits in excess of 48 months.

(10) I must complete at least 24 months of a 3 year active duty service obligation and if my obligation is 2 years I may join and serve honorably in the Selected Reserve for a minimum of 48 months to qualify for the current active duty benefit rate. A (one) period of service **CANNOT** qualify me for both active and reserve MGIB benefits.

a. SERVICE MEMBER SIGNATURE	b. RANK/GRADE	c. DATE SIGNED (*YYYYMMDD*)
RICKY LEE RICARDO	BM2/E5	2006NOV06

4. SERVICE UNIQUE EDUCATION ASSISTANCE OPTIONS

NONE

5. STATEMENT OF DISENROLLMENT

I **DO NOT** desire to participate in MGIB. I understand the benefits of the MGIB program and that I **WILL NOT** be able to enroll at a later date.

a. DATE SIGNED (*YYYYMMDD*)	b. RANK/GRADE	c. SERVICE MEMBER SIGNATURE

6. CERTIFYING OFFICIAL

a. TYPED OR PRINTED NAME (*LAST, First, Middle Initial*)	b. RANK/GRADE	c. SIGNATURE	d. DATE SIGNED (*YYYYMMDD*)
SEE,ALPHA, B	YNC/E7		2006NOV06

Exhibit 6 – Career Intentions Worksheet

Description

This worksheet, which is completed by the member, and signed by the unit Commanding Officer, is sent to the SPO along with other forms (the CG-3307 for SRB and a copy of the MGIB acknowledgment). The SPO will use the information from this worksheet to prepare the Statement of Intent transaction and to prepare the enlistment contract.

Department of Homeland Security
U. S. Coast Guard
CG PSC-2045 (Rev. 08/06)

Career Intentions Worksheet

1. EMPLID	2. Name (Last, First, MI)	3. Permanent Unit (Dept ID)
1234567	Ricardo, Ricky, L	009933/CG Unit San Diego

PURPOSE: Use this form is to convey career intentions to the SPO. If you wish to remain with the service, complete Extension/Reenlistment and Leave sections. If your intentions are to separate from the service, complete Separation and Leave sections. Complete a Preseparation Counseling Checklist (DD-2648), also.

4. Answer these questions. If you answer no to these questions, contact your career counselor or unit administrative staff/SPO

Yes	No	Question
☐	☒	Has your unit conducted a 6-month predischarge interview and completed a Preseparation Counseling Checklist (DD-2648)? (Required if separating)
☒	☐	Have you been advised on the subject of SRB eligibility?
☒	☐	Are you a U. S. Citizen? (If no, you cannot reenlist or extend without authority from CGPC) (Note: Per 1.G.5.5., CG PERSMAN, this does not apply to a member who enlisted from the Republic of the Philippines)

EXTENSION/REENLISTMENT SECTION

5. I plan to....	6. For # of yrs (Note: if reenlisting, the minimum is 3 years) Note: Members with at least 10 years active service will be reenlisted indefinitely	7. Effective date of Extension/Reenlistment
☐ extend ☒ reenlist	☐ 2yrs ☐ 3yrs ☒ 4yrs ☐ 5yrs ☐ 6yrs ☐ Other: ____	12/01/06

8. Person administering the oath for extension agreement/reenlistment:

Name: Richard A. Jones Rank: LCDR Title: Commanding Officer, CG Unit San Diego

9. CO's recommendation signature: *Richard A. Jones*

(Certifies member is eligible (IAW Chap 1-G of the CG PERSMAN) and is recommend for reenlistment/extension)

10. REASON FOR EXTENSION/REEXTENSION OF ENLISTMENT:

☐ REQUEST OF INDIVIDUAL	☐ AUTHORIZED BY COMMANDER CGPC
☐ SCHOOL TRAINING REQUIREMENT	☐ OBLIGATED SERVICE FOR ADVANCEMENT
☐ OBLIGATED SERVICE FOR TRANSFER	☐ OBLIGATED SERVICE FOR SRB BONUS
☐ PARTICIPATION IN TUITION ASSISTANCE PROGRAM	☐ COMPLETION OF DEPLOYMENT ABOARD VESSEL
☐ OBLIGATED SERVICE FOR RETIREMENT	☒ OTHER (SPECIFY): Reserve Integration

SEPARATION SECTION

Continued on next page

Exhibit 6 – Career Intentions Worksheet, Continued

Description (cont'd)

The reverse side of the worksheet shows the member desires to sell 10 days leave. Since the leave is being sold following active duty of more than 365 days, it counts towards the member's career total of 60 days lump sum leave entitlement.

Reverse of CG-PSC-2045 (Rev. 07/05)

22. LEAVE SECTION

If your leave plans change after completing this worksheet, immediately notify your SPO. **Failure to do so may result in an overpayment for which you will be responsible.**

I plan to: ☒ sell __10__ days of leave (Note: You are only authorized to sell a TOTAL of 60 days leave during your career.)

☐ take terminal leave starting ______

☐ take leave prior to my separation for periods listed below

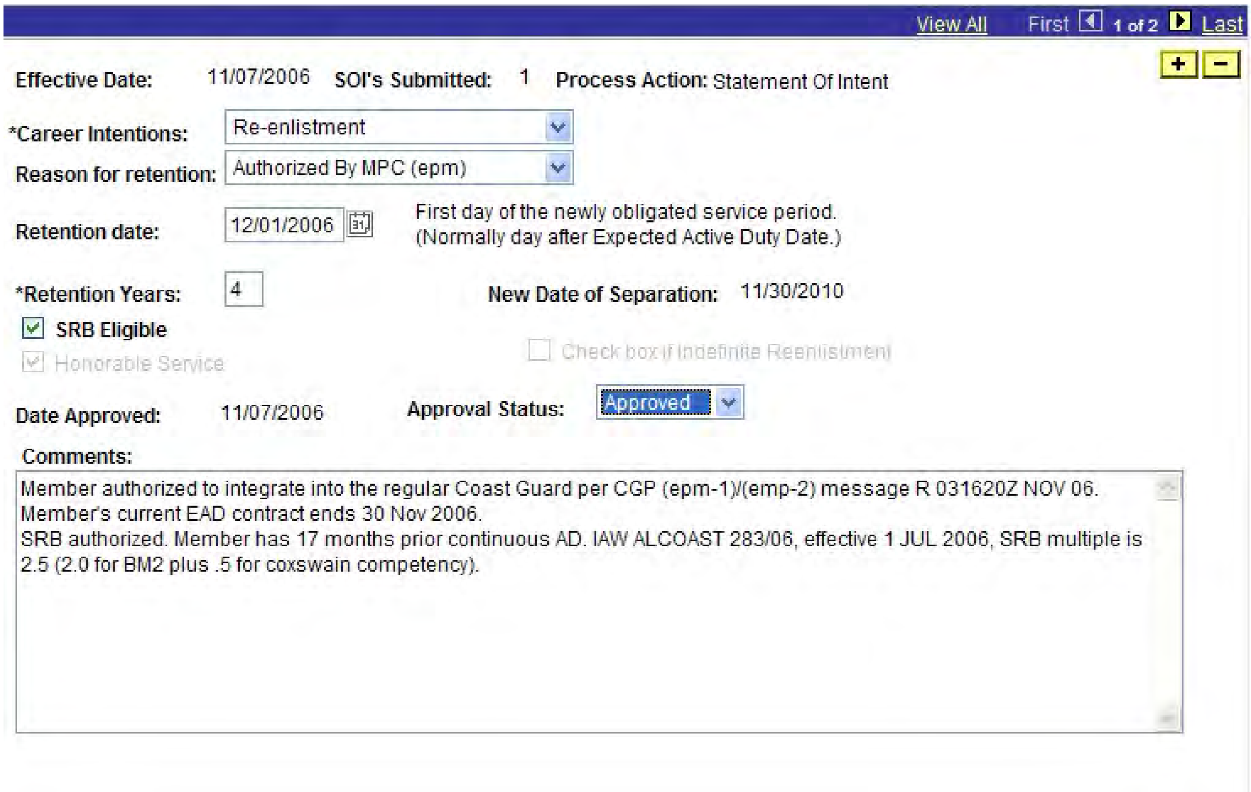
Note: If you are entering into an indefinite reenlistment this will be the last opportunity to sell leave before you retire or are discharged.

Enter inclusive leave dates (continue on separate page if necessary):

Exhibit 7— Statement of Intent

Description

Upon receipt of the Career Intentions Worksheet (but not later 30 to 45 days prior to the effective date of the enlistment), the SPO creates a Statement of Intent transaction in Direct-Access.



View All First 1 of 2 Last

Effective Date: 11/07/2006 SOI's Submitted: 1 Process Action: Statement Of Intent

*Career Intentions: Re-enlistment

Reason for retention: Authorized By MPC (epm)

Retention date: 12/01/2006 First day of the newly obligated service period. (Normally day after Expected Active Duty Date.)

*Retention Years: 4 New Date of Separation: 11/30/2010

SRB Eligible

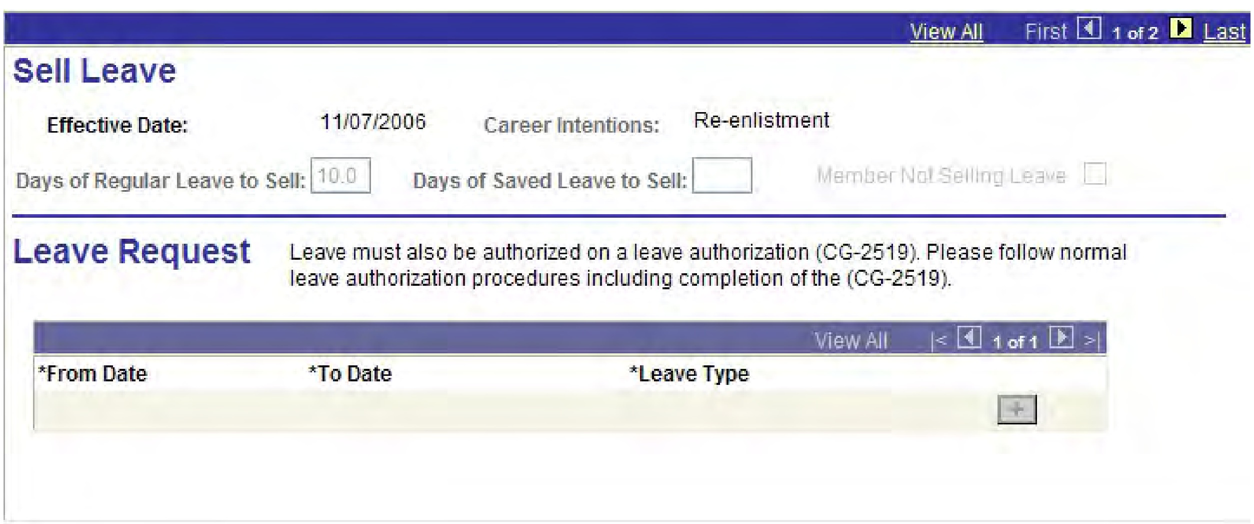
Honorable Service

Check box if Indefinite Reenlistment

Date Approved: 11/07/2006 Approval Status: Approved

Comments:

Member authorized to integrate into the regular Coast Guard per CGP (epm-1)/(emp-2) message R 031620Z NOV 06. Member's current EAD contract ends 30 Nov 2006.
SRB authorized. Member has 17 months prior continuous AD. IAW ALCOAST 283/06, effective 1 JUL 2006, SRB multiple is 2.5 (2.0 for BM2 plus .5 for coxswain competency).



View All First 1 of 2 Last

Sell Leave

Effective Date: 11/07/2006 Career Intentions: Re-enlistment

Days of Regular Leave to Sell: 10.0 Days of Saved Leave to Sell: Member Not Selling Leave

Leave Request Leave must also be authorized on a leave authorization (CG-2519). Please follow normal leave authorization procedures including completion of the (CG-2519).

View All |< 1 of 1 >|

*From Date	*To Date	*Leave Type

Exhibit 8 – Enlistment Contract

Description

The Enlistment Contract is prepared by the SPO upon receipt of the member's Career Intentions Worksheet (CIW).

The CIW provided them with:

- number of years of the enlistment,
- name and rank of the officer administering the oath,
- and the date.

ENLISTMENT/REENLISTMENT DOCUMENT
ARMED FORCES OF THE UNITED STATES

PRIVACY ACT STATEMENT

The SPO used member's Direct Access/JUMPS records to calculate the member's total prior active service and inactive service.

- First, by adding all of the member's reserve active duty orders together and subtracting the total from the date of this enlistment. This calculation will also be used to establish the member's Active Duty Base Date when inputting the accession into Direct-Access.
- They used the member's date of original enlistment, subtracted from the date of discharge (day immediately prior to this integration) to determine total prior service.
- They deducted the total prior active service from the total service to determine the total prior inactive service

A. ENLISTEE/REENLISTEE IDENTIFICATION DATA

1. NAME *(Last, First, Middle)* Ricardo, Ricky, Lee	2. SOCIAL SECURITY NUMBER 123-45-6789
3. HOME OF RECORD *(Street, City, State, ZIP Code)* 133 Any Street #12 San Diego, CA 98124	4. PLACE OF ENLISTMENT/REENLISTMENT *(Mil. Installation, City, State)* U.S. Coast Guard Unit, 456 Any Street, San Diego, CA

5. DATE OF ENLISTMENT/ REENLISTMENT (YYYYMMDD)	6. DATE OF BIRTH *(YYYYMMDD)*	7. PREV MIL SVC UPON ENL/REENLIST	YEARS	MONTHS	DAYS
20061201	19820601	a. TOTAL ACTIVE MILITARY SERVICE	03	08	20
		b. TOTAL INACTIVE MILITARY SERVICE	02	08	21

B. AGREEMENTS

8. I am enlisting/reenlisting in the United States *(list branch of service)* Coast Guard this date for 4 years and 0 weeks beginning in pay grade E5. The additional details of my enlistment/reenlistment are in Section C and Annex(es)

Continued on next page

Exhibit 8 – Enlistment Contract, Continued

NAME OF ENLISTEE/REENLISTEE *(Last, First, Middle)*	SOCIAL SECURITY NO. OF ENLISTEE/REENLISTEE
Ricardo, Ricky, Lee	123-45-6789

D. CERTIFICATION AND ACCEPTANCE

13a. My acceptance for enlistment is based on the information I have given in my application for enlistment. If any of that information is false or incorrect, this enlistment may be voided or terminated administratively by the Government or I may be tried by a Federal, civilian, or military court and, if found guilty, may be punished.

I CERTIFY THAT I HAVE CAREFULLY READ THIS DOCUMENT. ANY QUESTIONS I HAD WERE EXPLAINED TO MY SATISFACTION. I FULLY UNDERSTAND THAT ONLY THOSE AGREEMENTS IN SECTION B OF THIS DOCUMENT OR RECORDED ON THE ATTACHED ANNEX(ES) WILL BE HONORED. ANY OTHER PROMISES OR GUARANTEES MADE TO ME BY ANYONE ARE WRITTEN BELOW: *(If none, X "NONE" and initial.)* ☐ NONE RLR *(Initials of enlistee/reenlistee)*

In accordance with ALCOAST message 283 06, entitled to Selective Reenlistment Bonus (SRB) multiple of 1.5 for 48 months of newly obligated service.

b. SIGNATURE OF ENLISTEE/REENLISTEE	c. DATE SIGNED *(YYYYMMDD)*
Ricky Lee Ricardo	20061201

14. SERVICE REPRESENTATIVE CERTIFICATION

a. On behalf of the United States *(list branch of service)* Coast Guard

I accept this applicant for enlistment. I have witnessed the signature in item 13b to this document. I certify that I have explained that only those agreements in Section B of this form and in the attached Annex(es) will be honored, and any other promises made by any person are not effective and will not be honored.

b. NAME *(Last, First, Middle)*	c. PAY GRADE	d. UNIT/COMMAND NAME
JONES, RICHARD, A	O4	CG Unit San Diego
e. SIGNATURE	**f. DATE SIGNED *(YYYYMMDD)***	**g. UNIT/COMMAND ADDRESS *(City, State, ZIP Code)***
Richard A. Jones	20061201	123 Any Street, San Diego, CA 98124-0021

E. CONFIRMATION OF ENLISTMENT OR REENLISTMENT

15. IN THE ARMED FORCES EXCEPT THE NATIONAL GUARD (ARMY OR AIR):

I, Ricky Lee Ricardo, do solemnly swear (or affirm) that I will support and defend the Constitution of the United States against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; and that I will obey the orders of the President of the United States and the orders of the officers appointed over me, according to regulations and the Uniform Code of Military Justice. So help me God.

16. IN THE NATIONAL GUARD (ARMY OR AIR):

I, N/A, do solemnly swear (or affirm) that I will support and defend the Constitution of the United States and the State of N/A against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; and that I will obey the orders of the President of the United States and the Governor of N/A and the orders of the officers appointed over me, according to law and regulations. So help me God.

17. IN THE NATIONAL GUARD (ARMY OR AIR):

I do hereby acknowledge to have voluntarily enlisted/reenlisted this N/A day of N/A, N/A in the N/A National Guard and as a Reserve of the United States *(list branch of service)* N/A with membership in the N/A National Guard of the United States for a period of N/A years, N/A months, N/A days, under the conditions prescribed by law, unless sooner discharged by proper authority.

18.a. SIGNATURE OF ENLISTEE/REENLISTEE	b. DATE SIGNED *(YYYYMMDD)*
Ricky Lee Ricardo	20061201

19. ENLISTMENT/REENLISTMENT OFFICER CERTIFICATION

a. The above oath was administered, subscribed, and duly sworn to (or affirmed) before me this date.

b. NAME *(Last, First, Middle)*	c. PAY GRADE	d. UNIT/COMMAND NAME
Jones, Richard A	O4	CG Unit San Diego
e. SIGNATURE	**f. DATE SIGNED *(YYYYMMDD)***	**g. UNIT/COMMAND ADDRESS *(City, State, ZIP Code)***
Richard A. Jones	20061201	123 Any Street, San Diego, CA 98124-0021

DD FORM 4/2, JAN 2001 PREVIOUS EDITION MAY BE USED.

Exhibit 9 – Direct Access Data Entry

Description

The SPO entered the member's discharge and accession in Direct Access using the procedures in chapters 2, 3, 4 and 8 of this guide.

1. Requisition Number

Their first step, per chapter 2-A of this guide, was to create a Job Requisition number for the position the member will be assigned.

The SPO obtained the position number from CGPSC's approval/enlistment authorization message (exhibit 3 of this enclosure).

```
3. BM2 RICARDO WILL REMAIN AT HIS CURRENT UNT IN POSN NBR 00073832.
```

When creating the requisition they ensured that the Job Code was set to the correct number for "BM2" and the grade was set to E5.

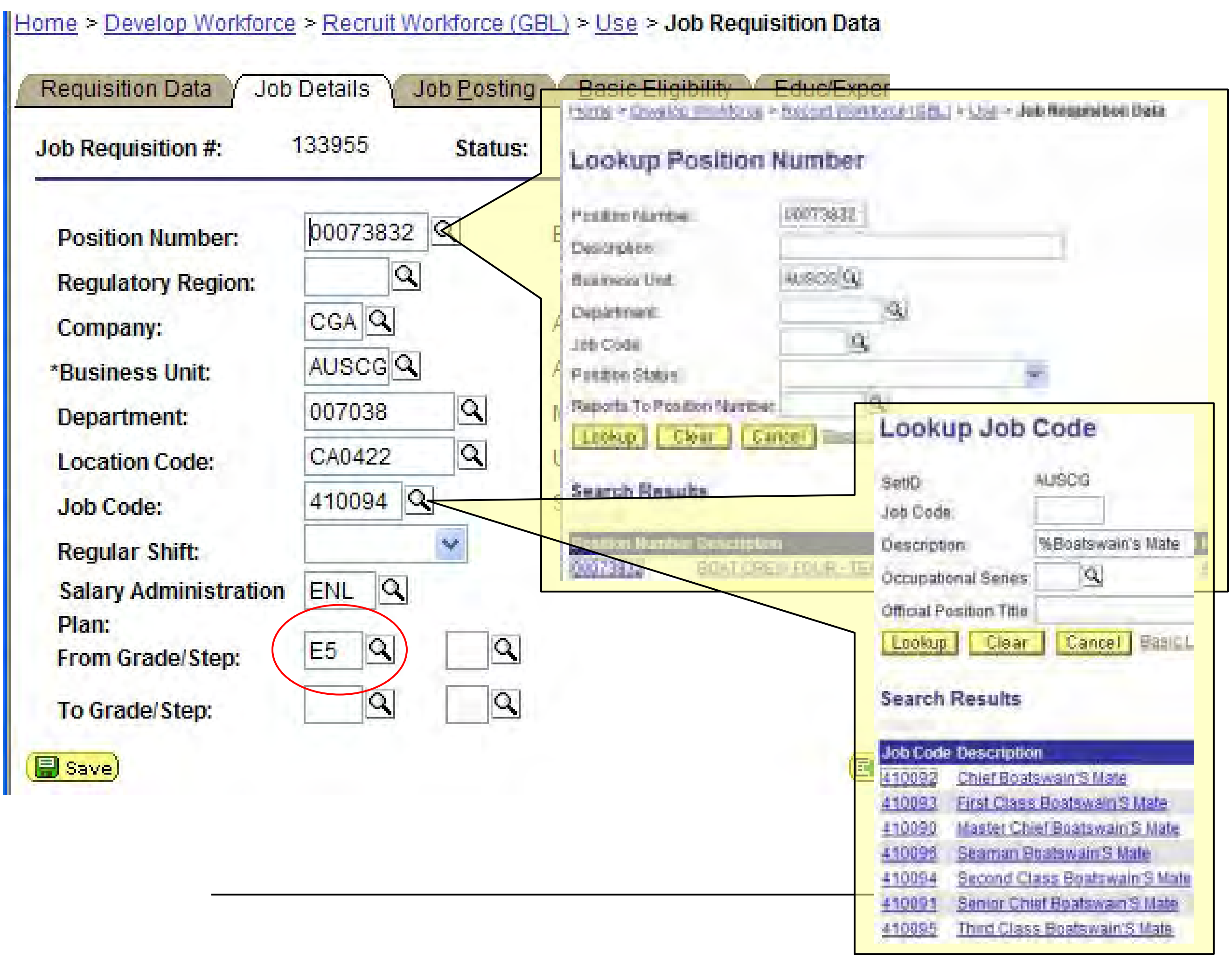


Exhibit 9 – Direct Access Data Entry, Continued

2. Generate Applicant ID

The SPO followed the procedures in chapter 2-B of this guide to generate a new applicant ID. They made sure to set the application date to match the date the member will enlist in the Coast Guard ①and to associate the member's current Employee ID with the Applicant ID ②.

After clicking the Add button, they clicked the Requisition link on the Applicant Data page and entered the Job Requisition number they created in the previous step. They verified the requisition data (Department ID and Job Code) before clicking the Save button and generating the Applicant ID.

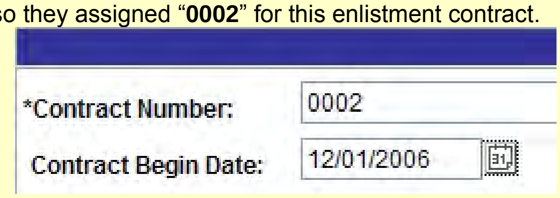
Continued on next page

Exhibit 9 – Direct Access Data Entry, Continued

3. Applicant Contract Data

The SPO followed the procedures in chapter 3 of this guide to complete the Contract Data.

To complete the first tab "**Contract Status/Content**", they obtained the contract number by going to the member's current contract data (Administer Workforce > Administer Workforce (GBL) > Use > Contract Data) to see what the next number would be. The member only had one prior contract (his original enlistment in the reserve) so they assigned "**0002**" for this enlistment contract.



They set the **Contract Begin Date** to match the date of this enlistment. The field pre-filled with the current date, so the accession would have failed to process if they didn't change the Contract Begin Date.

They used the information from the Career Intentions Worksheet (Exhibit 6 of this enclosure) to complete the Contract/Clause tab.

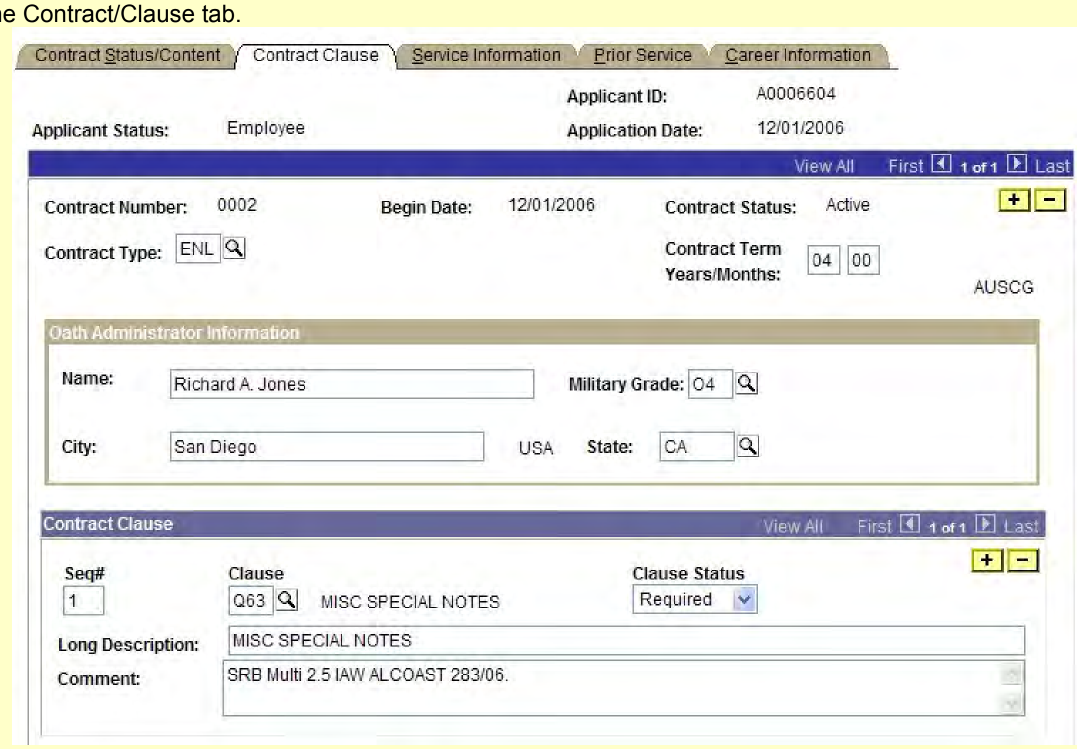


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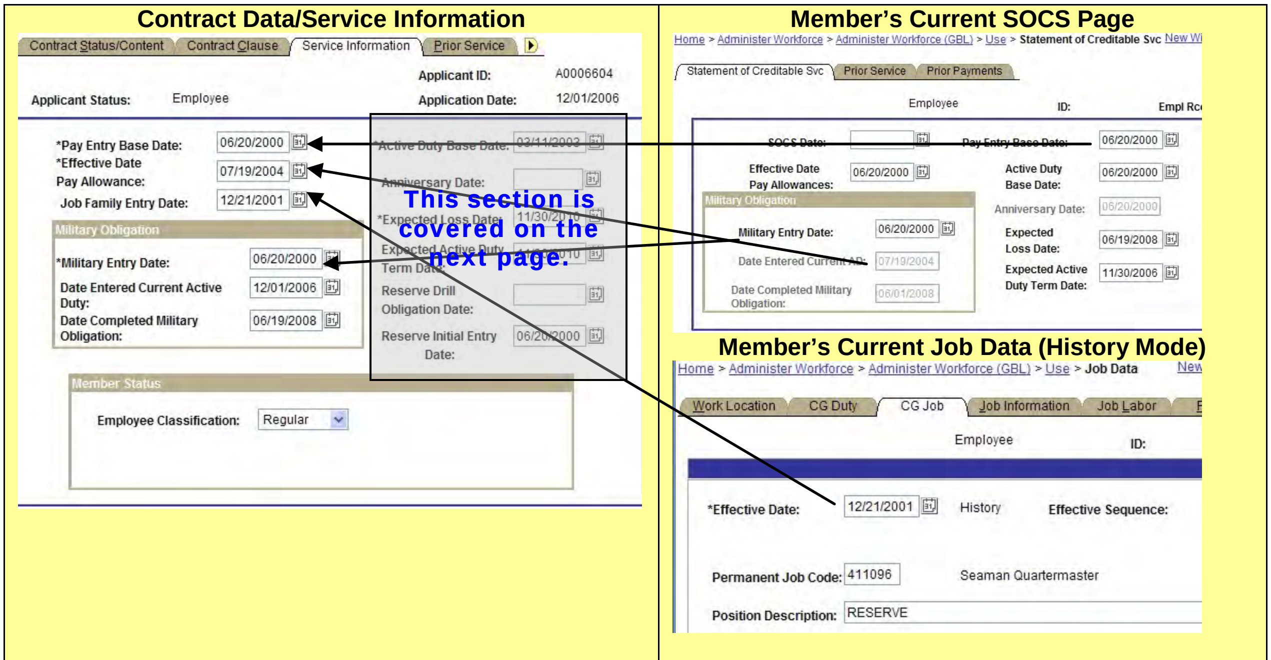
Exhibit 9 – Direct Access Data Entry, Continued

The SPO had to drawn on several resources to complete the Service Information tab.

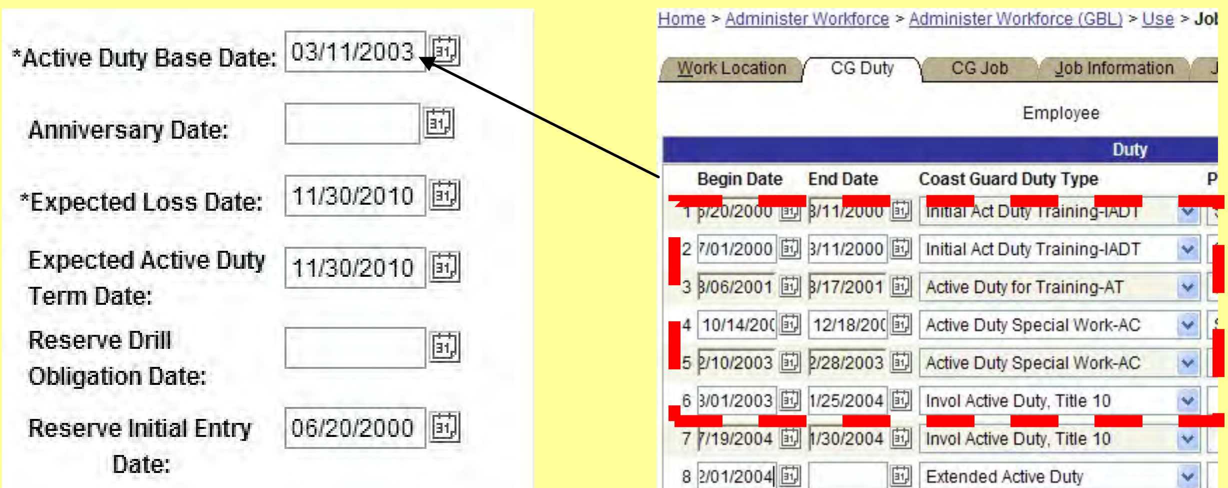


Field	Data Source(s)
Pay Entry Base Date	Copied from SOCS page. Member hasn't had a break in service.
Effective Date for Pay & Allowances	Copied from the SOCS page. Member hasn't had a break in active duty service since this date.
Job Family Entry Date	Per the instructions for this field (chapter 3), the SPO needed to determine when the member first became a member of the BM rating. When researching this in the member's Job Data (the CG Job tab) they noted the member had previously been a QM and changed to BM as part of the JRR. These members keep their original rating date. The SPO selected the date the member was first assigned a QM designator.
Military Entry Date	Copied from SOCS page.
Date Entered Current Active Duty Period	Used date for this enlistment.
Date Completed Military Obligation	Computed by adding 8 years to the member's Military Entry Date. The could have copied the date from the SOCS page, but it had 01 June, which is less than 8 years from the Military Entry Date of 20 June.
Employee Classification	The SPO set this to "Regular" as the member is enlisting in the Regular Coast Guard.

Continued on next page

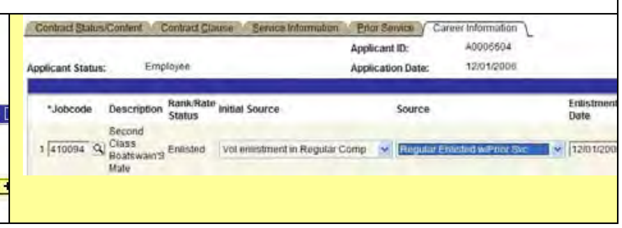
Exhibit 9 – Direct Access Data Entry, Continued

Completing the Service Information Tab (cont'd)



Field	Data Source(s)
Active Duty Base Date	The SPO computed the Active Duty Base Date, in accordance with Appendix (C) of the PPPM, by adding up all prior active duty and subtracting the total from date of the most recent entry onto active duty (The member has been on continuous AD since 7/19/2004). The SPO obtained the listing of prior active duty periods from the member's current Job Data (CG Duty tab) and they also verified that the member had no additional prior active duty by viewing the member's point statement in JUMPS.
Anniversary Date	This field can be left blank on a regular enlistment
Expected Loss Date	These dates are the expiration of the new enlistment. 1 December 2006 + 4 years – 1 day.
Expected Active Duty Term Date	
Reserve Drill Obligation Date	Left blank as member doesn't have any remaining drill obligation.
Reserve Initial Entry Date	Carried over from member's original enlistment in the CGR.

The **Prior Service** and **Career Information** tabs were completed per the instructions on chapter 3 of this guide.



Continued on next page

Exhibit 9 – Direct Access Data Entry, Continued

4. Entering the Discharge

The SPO entered the discharge per the instructions in chapter 8 of this guide. Nothing special was required other than to ensure the termination date was 30 Nov 2006, the day prior to the enlistment date of 1 Dec 2006.

5. Approving the Discharge

Once confirmation of the member's enlistment was received from the unit, the SPO went in a approved the member's discharge.

They immediately completed the Hire Applicant and Entitements transactions to ensure all transactions were submitted and processed in the same JUMPS payroll cycle.

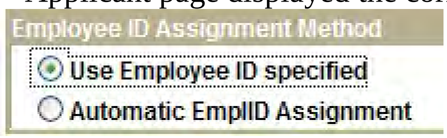
Continued on next page

Exhibit 9 – Direct Access Data Entry, Continued

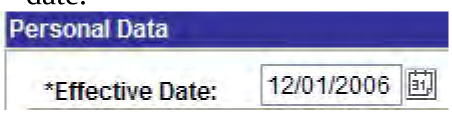
6. Completing the Hire Applicant

The SPO followed the procedures in chapter 3 of this guide to complete the accession. The SPO:

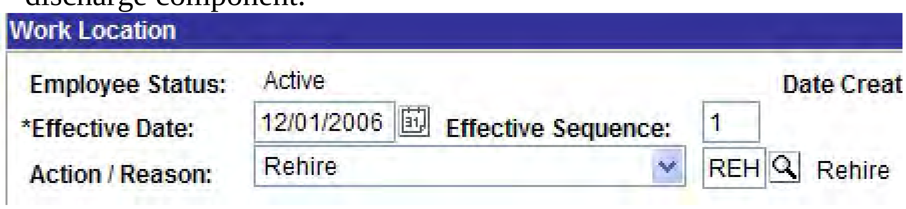
- Made sure the Use Employee ID specified option was selected and the Hire Applicant page displayed the correct Employee ID Number.



- Changed the date on the Personal Data component to match the enlistment date.

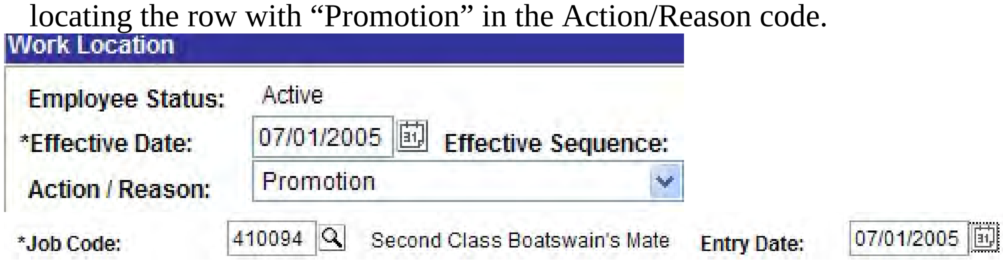


- Changed the Effective Sequence number to “1” on the Work Location tab of the Job Data Component so the accession would save without conflicting with the separation row, with the same date, that was added by the discharge component.



- Corrected “Entry Date” field on the Job Information tab to show the member’s date of rank. Per the program guidance (exhibit 1), the member’s date of rate doesn’t change. Although, in this case the member advanced to BM2 while on Active Duty and would keep that date of rank because there’s no break in service.

- Determined the date of rank by viewing the member’s Job Data history and locating the row with “Promotion” in the Action/Reason code.

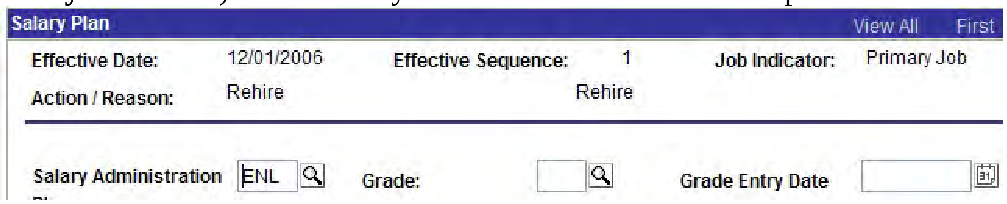


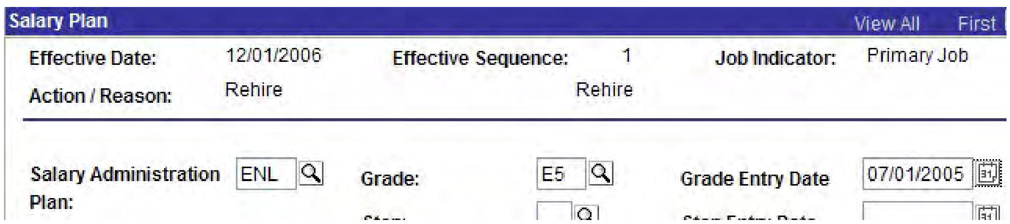
Continued on next page

Exhibit 9 – Direct Access Data Entry, Continued

6. Completing the Hire Applicant (continued)

They also needed to enter the member’s pay grade and date of rank (**Grade Entry Date** field) on the Salary Plan tab of the Job Data component.





The final step, before saving the Hire Applicant page, was to enter a new row in Benefit Program Participation component using the enlistment date as the effective date.

Continued on next page

Exhibit 9 – Direct Access Data Entry, Continued

7. Restarting Pay Entitlements

After completing and successfully saving the Hire Applicant page, the SPO went to the member's Entitlements page to restart BAH, BAS, CCOLA and any special pays or allowances the member was receiving. The discharge transaction automatically stops all pay entitlements after it is approved and saved. The auto-stop is indicated by the word "Discharge" in Earnings Process Type column of the entitlement row. The entitlement stop date will be the same as the discharge date.

BAH Auto-Stop:

	*Start Date	Start Time/Seq	Stop Date	Stop Time/Seq	*Earnings Type	Description	Approval Status	Manual Row Switch	Detail	Approve	Earning Pr
1	12/01/2004	2527	11/30/2006	9904	BAH-G	Without Depns; mbr not assigned govt quarters	A	☐	Detail	Approve	Discharge

The SPO inserted a new row for each entitlement that was stopped by the discharge transaction. They used the enlistment date for the start date (which must be one day after the discharge date) and copied the zip codes from the detail screens of the BAH and CCOLA entries to the new rows since this member did not PCS in connection with this enlistment.

BAH Restart:

1	12/01/2006	2546		0000	BAH-G	Without Depns; mbr not assigned govt quarters	A	☐	Detail	Approve

BAS and CCOLA rows (showing auto-stop and manual restart):

*Earnings Code: BAS Subsistence

	*Start Date	Start Time/Seq	Stop Date	Stop Time/Seq	*Earnings Type	Description	Approval Status	Manual Row Switch	Earning Pro
1	12/01/2006	2547		0000	ENLBAS	Enlisted BAS	A	☐	
2	01/01/2005	0001	11/30/2006	9904	ENLBAS	Enlisted BAS	A	☐	Discharge

*Earnings Code: ICC CONUS COLA

	*Start Date	Start Time/Seq	Stop Date	Stop Time/Seq	*Earnings Type	Description	Approval Status	Manual Row Switch	Detail	Earning Pro
1	12/01/2006	2548		0000	COLAWO	CONUS COLA Without DEPNS	A	☐	Detail	
2	12/01/2004	2529	11/30/2006	9904	COLAWO	CONUS COLA Without DEPNS	A	☐	Detail	Discharge