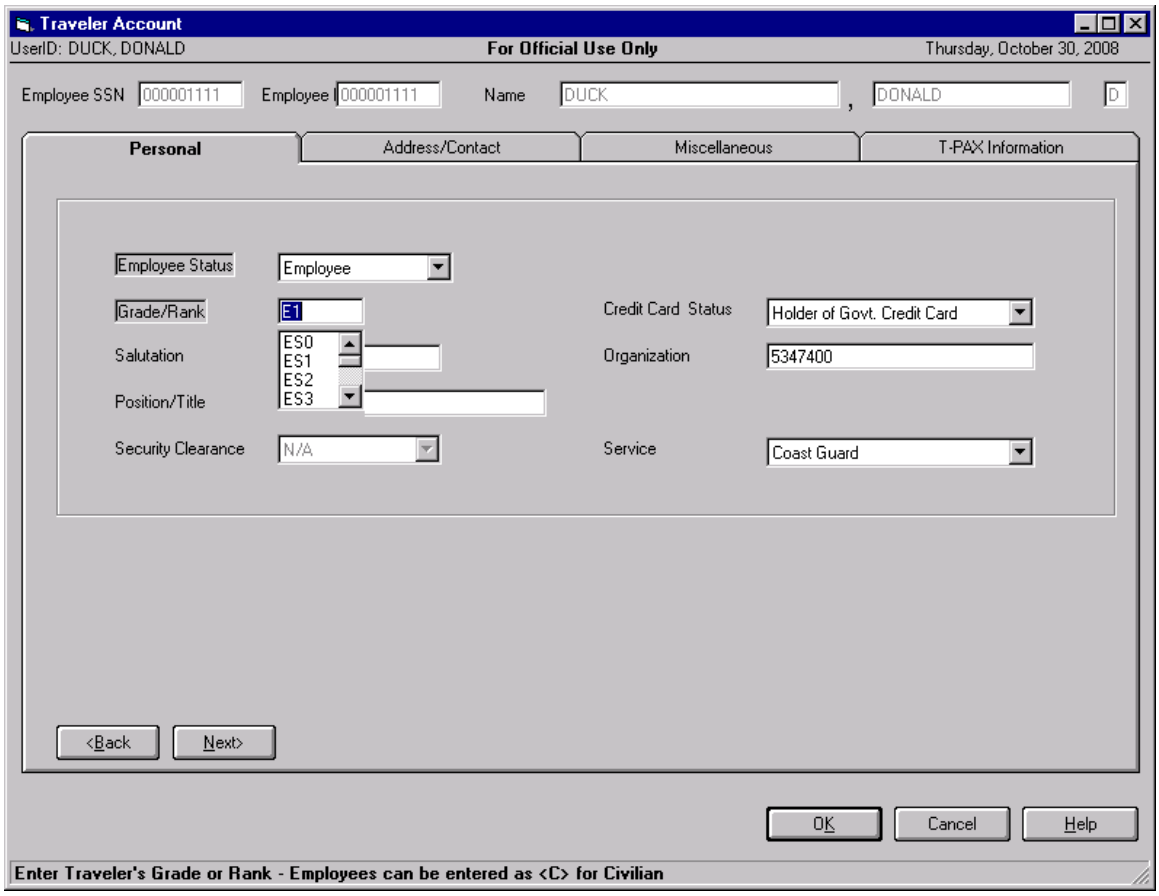
What's New in T-PAX Version 6.11

1. Please remember to have your travel claim approved by the Authorizing Officer (AO) prior to Nov 30, 2008 (8 pm CST) to ensure the claim is processed for payment prior to the upgrade. This eliminates the potential of your claim becoming corrupt.

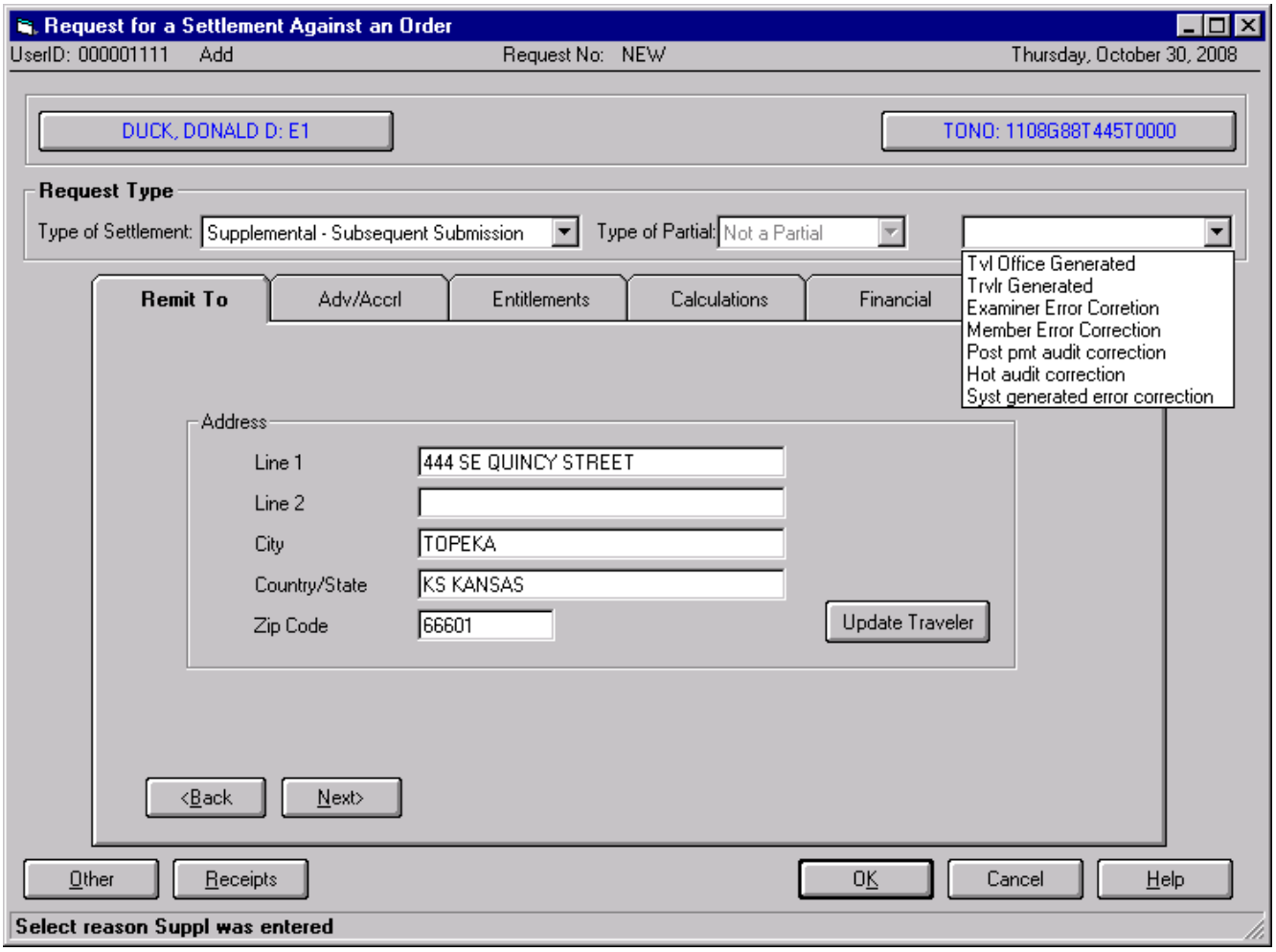
2. T-PAX will be unavailable from approximately 0600 Dec 1, 2008 to 1300 Dec 2, 2008 (CST).

3. Please be advised that when the upgrade occurs, passwords will convert to ALL CAPS (uppercase letters). If you have difficulty using your password, convert the password to ALL CAPS prior to contacting customer service for a reset. Once you have logged onto the system, you should go to the tool menu and click on the change password link to update the password at this time.

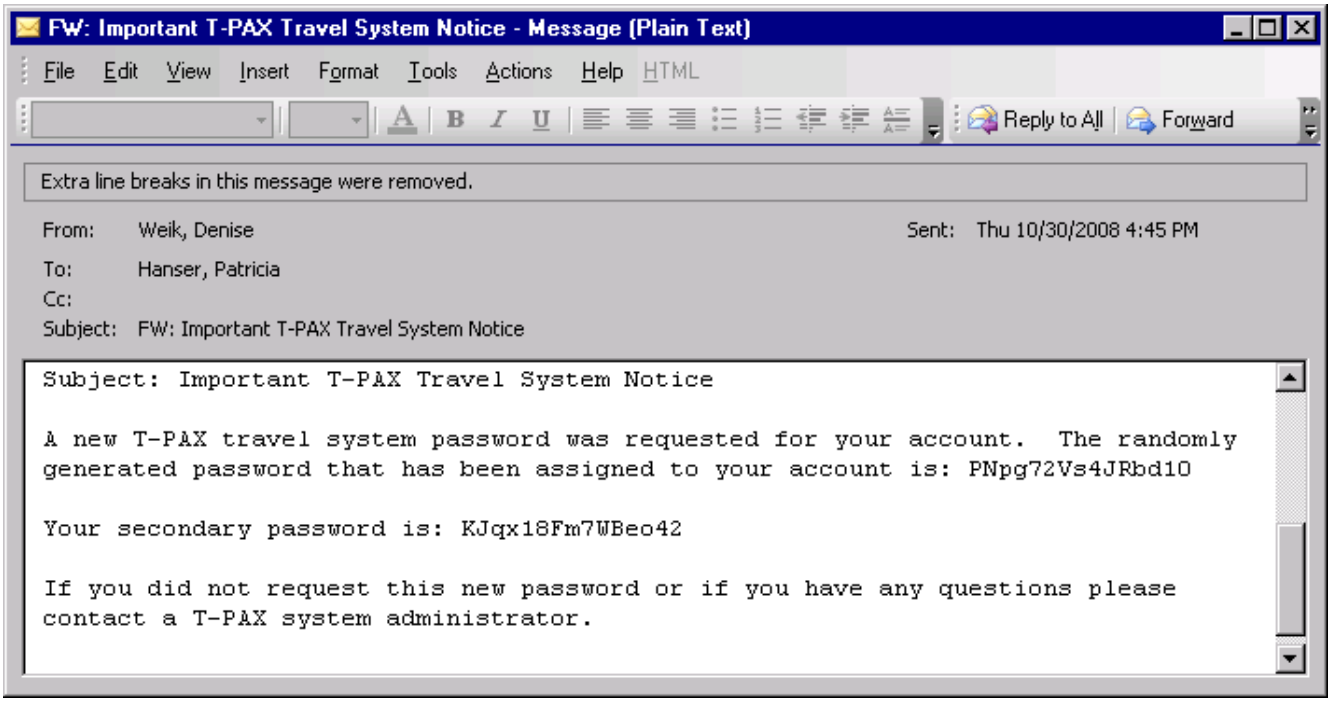
4. The Rank/Grade updates in T-PAX have been fixed to allow input by system administrators to add NEW ranks into the drop down menu (the issue where civilian ranks did not show up correctly which prevented you from processing a claim without intervention from a system administrator has been resolved).



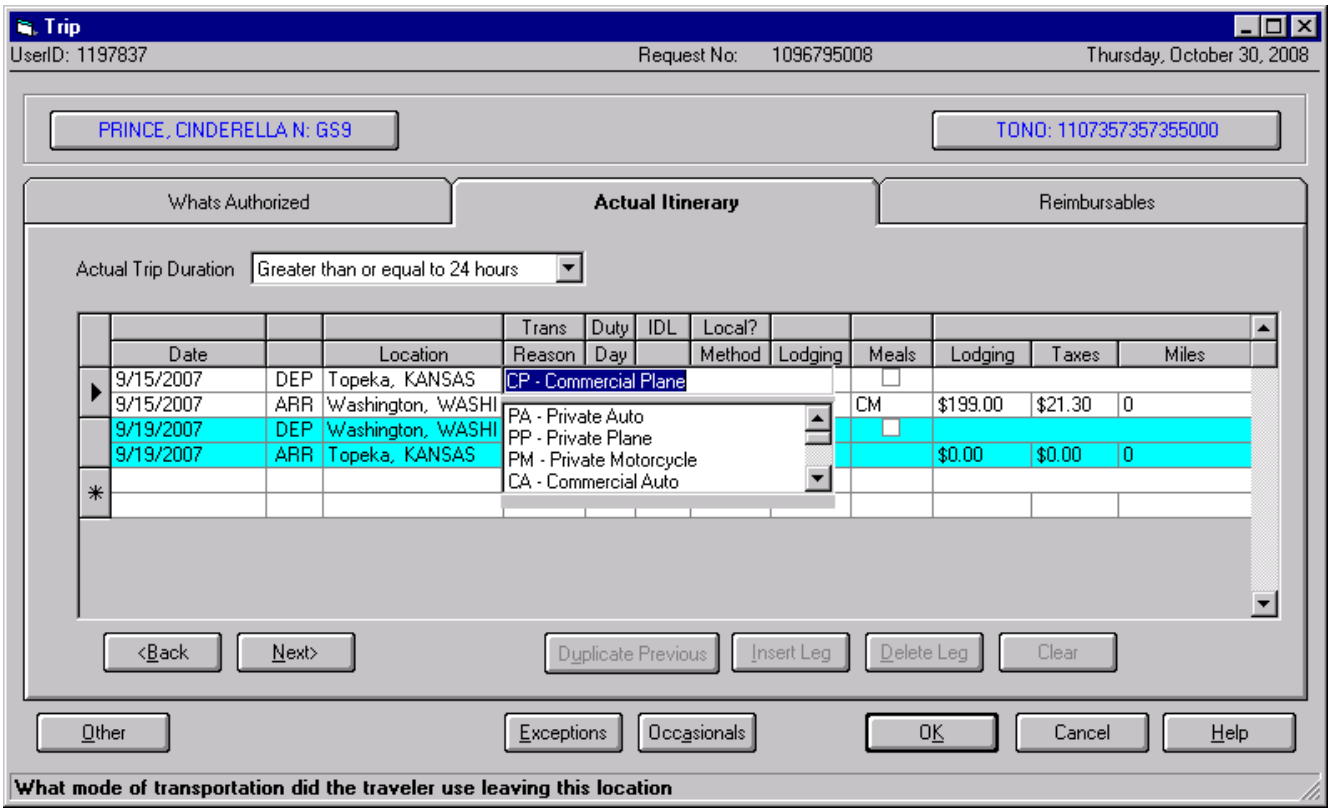
5. When processing supplemental claims, you should use the drop down menu to indicate why the supplemental is being created. This information will be used for statistical purposes toward improving system and training issues designed to reduce the volume of supplemental claims.



6. When clicking on the forgotten password button on the T-PAX log on screen, the system now sends an email to the traveler's primary email address listed in T-PAX with both a random generated log on password and a random generated secondary password. Note: there is a requirement to change the logon password once member logs into T-PAX. DO NOT ATTEMPT TO CHANGE YOUR SECONDARY AT THE SAME TIME. Once you are in T-PAX, you should use the tools bar and change your secondary password. In both cases, member will need to input the random generated password as the OLD password to make the necessary changes.



7. T-PAX now has expanded drop down menus to enable AOs and Customer Service (CS) individuals to see what the abbreviations mean within a travel claim. For example, when a traveler uses PM and the AO or CS does not know what that stands for, they can click on the drop down arrow and next to the abbreviation will be the full wording "PM – Private Motorcycle". Neither the AO nor the CS can make changes to this field but they can view it.



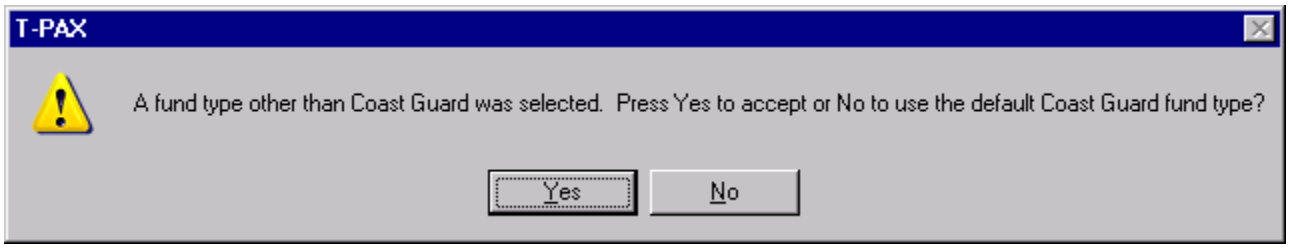
8. Travel Voucher Summaries will now show when a claim has been processed through T-PAX and who approved the claim. This information will be printed in the top third of the TVS, directly below the member information.

611TVS.txt - Notepad

File Edit Format View Help

```
*1096794708*


         Personal Data - Privacy Act of 1974 - Handle with care     Page No:   1

RELEASE 6.10.106        Travel Voucher Summary           Block: 08I30002

                                                 Claim Number 1096794708
Name:HE E MANN                                   ------------------------------
     444 SE QUINCY ST                                      Paid By
     TOPEKA, KS 66683
                                                     DHS USCG PSC TVL DEPT
                                                      444 SE QUINCY STREET
                                                     TOPEKA, KS 66683-3503

Start Date: 03/10/08 End Date: 03/20/08             Paid 09/30/08

SSN: XXXXX7799    T/O : 1308033588854000
Travel Type: TDY    Grade/Rank: O3E
T-PAX claim approving official: DONALD DUCK ------------------------------
                                                 Prepared: 5/9/2008
Advances/Prior Payments:     0.00
Full Voucher
                                                 PLEASE NOTE THAT ALL TVL RELATED
Memb/Emp TDY Per Diem ..........  2162.00        QUESTIONS, CONCERNS, OR COMMENTS
Memb/Emp Transportation ........   162.53        NEED TO BE BROUGHT TO THE ATTN
Memb/Emp Reimbursables .........   127.90        OF PSC CUSTOMER CARE HELP DESK @
                                --------         1-866-PSC-USCG (772-8724) OR
Total Entitlement ..............  2452.43        PSCCUSTOMERCARE@HRSIC.USCG.MIL.
Less Partial Payments ..........     0.00        FOR PAYMENT QUESTIONS CALL
                                --------         FINCEN @ 1-800-564-5504.
Total Charged to Acct. Class ...  2452.43
```

9. When processing travel claim order information, you are required to input the fund type. Anytime you choose a fund type other than Coast Guard, the system generates a pop up message alerting you to your selection. You may then choose either Yes or No. If No is selected, the fund type will then change back to Coast Guard.



Coming to T-PAX Soon in 2009

1. Help guide information will be updated and available through the T-PAX system.

2. Long term evacuation will be available just like long term TDY so that multiple travel claims can be processed due to a long duration of absence from PDS.

3. Ability to do Amendments to Orders/Authorizations within the T-PAX system.

4. Improvements/fixes to the Imaging function to enable traveler to attach documents to travel claims.

5. Wizard mode – special improvement to assist infrequent travelers in processing their authorization, advance and settlement. This feature will have instruction boxes to instruct travelers what step they are on, how to process the information, and how to proceed.

6. Inactivity log out – when a T-PAX user does not use the system for a length of time, the system will provide a popup message asking if the member wants to continue…if so click Yes. If no response is given the system will automatically log the member out of T-PAX.

What's New for the field in T-PAX Version 6.10

Having trouble with your secondary/confirmation password?

Try entering it in all uppercase letters (e. g. "*Test1234#*" would be entered as "*TEST1234#*"). Secondary passwords stored in the system prior to the upgrade on 10 June were inadvertently converted to all uppercase letters

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Attaching Electronic Files (T-PAX Imaging Function)

Introduction

The T-PAX Imaging Function provides travelers with the ability to attach scans (or other electronic files) of receipts, orders and amendments to their travel request, authorization, claim/settlement or request for advance.

Before you begin

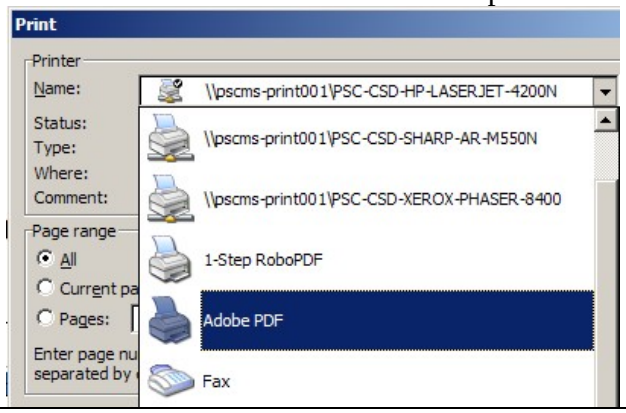
All documents MUST first be in an Adobe Acrobat PDF file. There are several ways to create a PDF file using *Adobe Acrobat 7 Standard*, which is included in the Coast Guard Standard Workstation software package. Two of the most common methods are discussed in the following sections:

1. Print to PDF
2. Create PDF from file

Skip to page 6 for the procedure for adding the file to your claim.

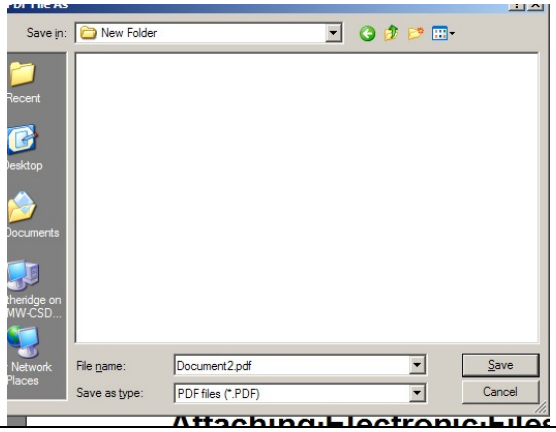
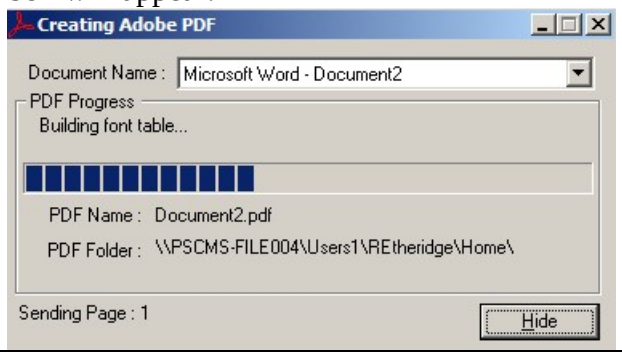
Print to PDF

If the document is already in electronic format, but not an Adobe Acrobat PDF file (e. g. an image (.jpg, .gif, .tif, etc.), a web page, an email message, or MS Office file) you can '*print*' the file directly to Adobe Acrobat.

Step	Action
1	Open the file and select **File | Print** from the application's menu.
2	Select "**Adobe PDF**" from the list of printers 

Continued on next page

Print to PDF **(continued)**

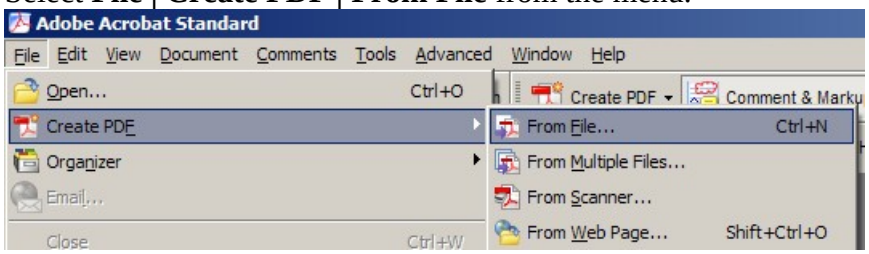
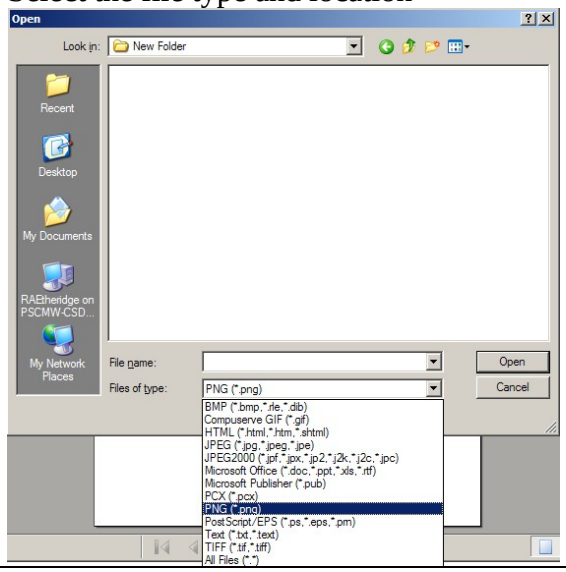
Step	Action
3	Name the file and select a location to save it to. 
4	Click the "**Save**" button. The "*Creating Adobe PDF*" information box will appear. 
5	After the process is complete, the PDF file will open in Adobe Acrobat.

Create PDF from a file

If the document is already in electronic format, but not an Adobe Acrobat PDF file (e. g. an image (.jpg, .gif, .tif, etc.), you can convert it to PDF file format using Adobe Acrobat's *Create PDF* menu.

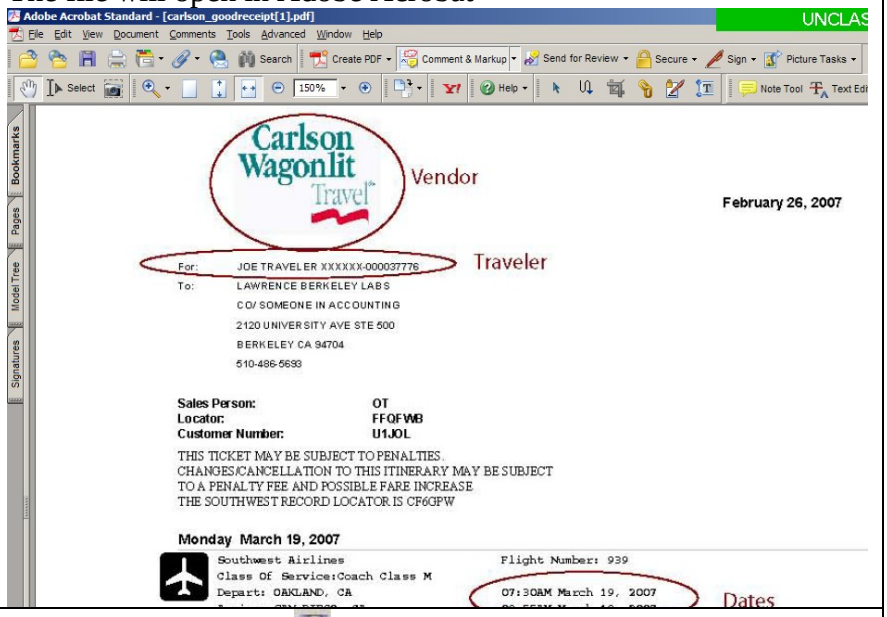
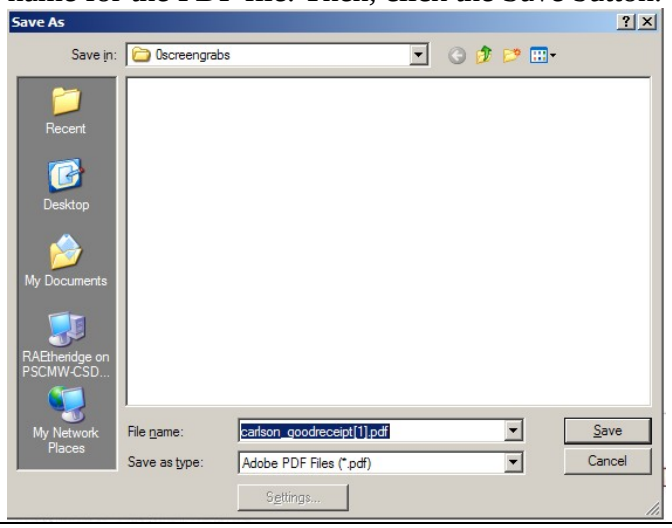
Continued on next page

Create PDF from a file (cont'd)

Step	Action
1	Start Adobe Acrobat (Start Menu | Programs | Adobe Acrobat 7 Standard)
2	Select **File | Create PDF | From File** from the menu.  *(Note that you can also create a PDF directly from a scanner if you have one attached to your workstation)*
3	Select the file type and location 
4	Click the **Open** button.

Continued on next page

Create PDF from a file (cont'd) **(continued)**

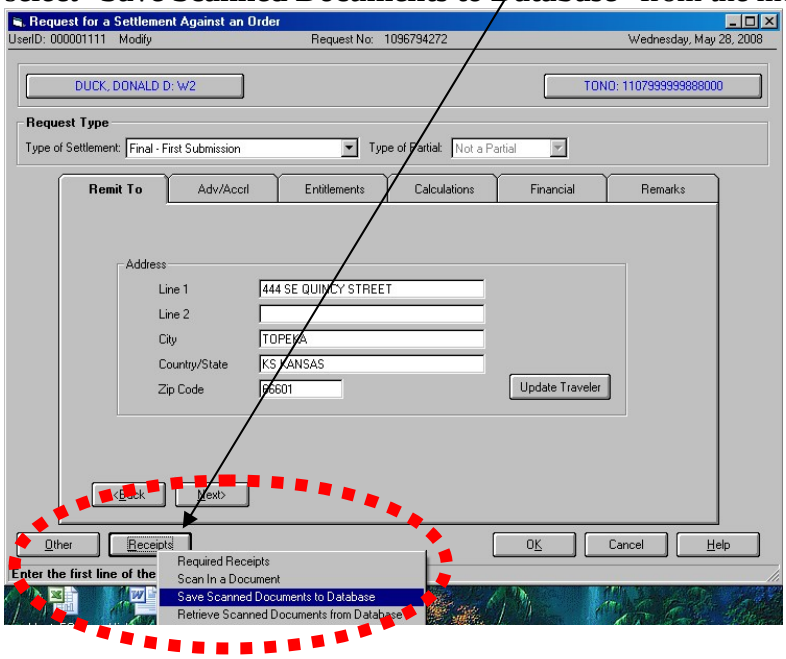
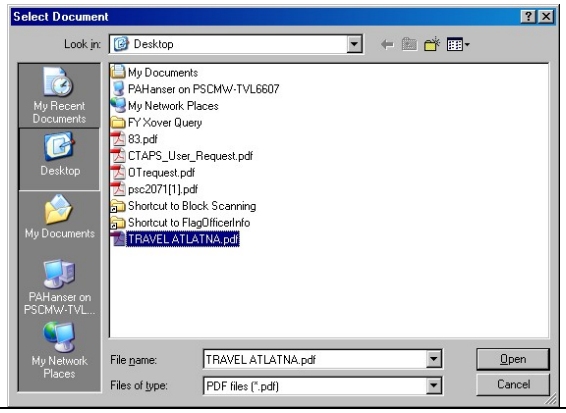
Step	Action
5	The file will open in Adobe Acrobat 
6	Click the Save icon -- , select a location and, if desired, a new name for the PDF file. Then, click the Save button. 

Continued on next page

Attaching Electronic Files (T-PAX Imaging Function), Continued

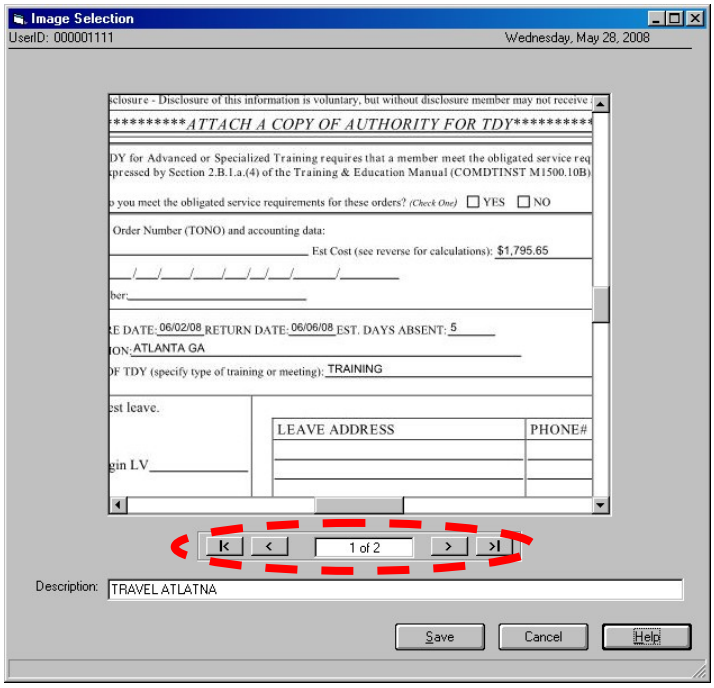
Attaching files in T-PAX

Now that you have your receipts and other supporting documentation in the correct format and saved to a location that is accessible from the workstation you are logged onto, you can attach them to your claim in T-PAX.

Step	Action
1	After completing a settlement – click the "**Receipts**" button then, select "**Save Scanned Documents to Database**" from the menu. 
2	Locate and select the PDF file and click the "**Open**" button. 

Continued on next page

Attaching files in T-PAX **(continued)**

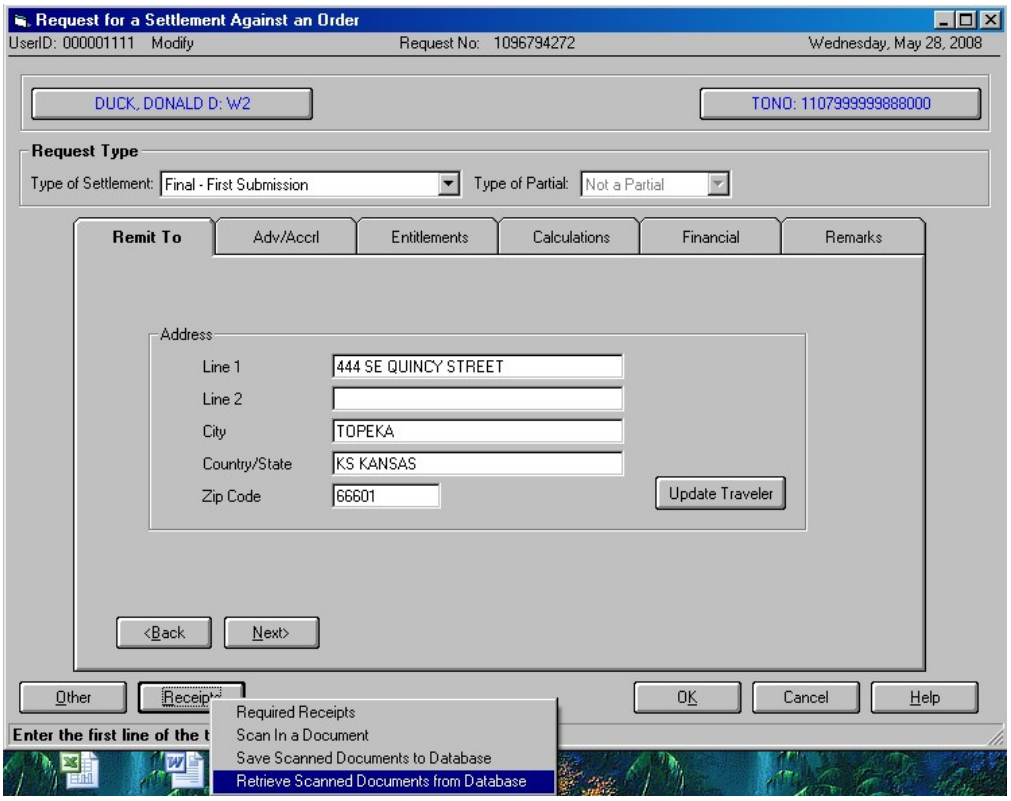
Step	Action
3	Verify the document and the number of pages on Image Selection Screen and click "**Save**".  This has now attached the PDF file to the claim number in the database. Repeat this procedure for each attachment.

Continued on next page

Attaching Electronic Files (T-PAX Imaging Function), Continued

Viewing /Managing attachments

To View Documents that have been attached to a travel claim/advance/authorization, Click the "**Receipts"** button and then click **Retrieve Scanned Documents from Database**.

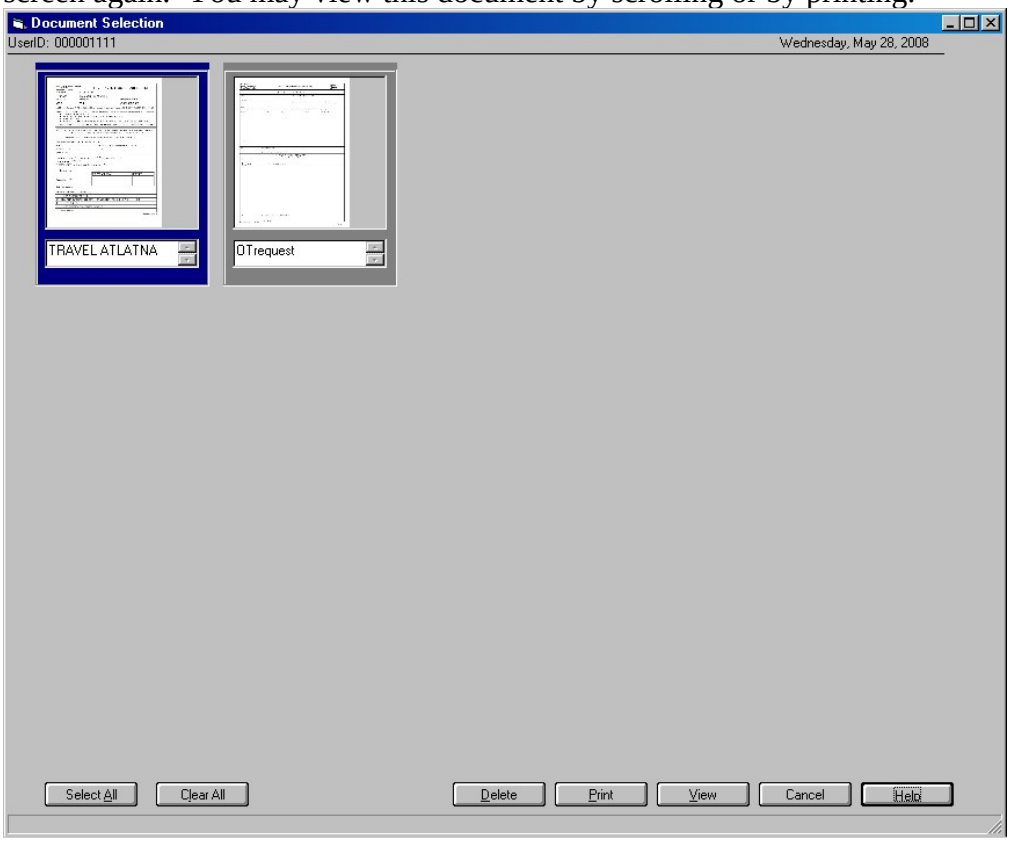


Continued on next page

Attaching Electronic Files (T-PAX Imaging Function), Continued

Viewing /Managing attachments (cont'd)

Each document saved will be shown by thumbnails. Click on the document to be viewed and then click **View**. This will bring up the Image Selection screen again. You may view this document by scrolling or by printing.



Click the "**Delete**" button to remove an attachment.

What's New for the field in T-PAX Version 6.10

Self-Service Password Reset

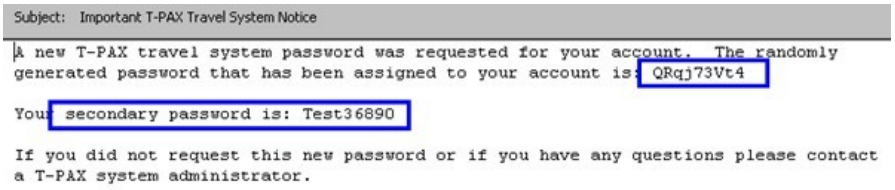
Primary and Secondary Passwords are reset

T-PAX now has two system generated passwords that go to the user's primary email account that is listed in T-PAX when user clicks on Forgotten password button. One for the logon password and one for the secondary/confirmation password.

1. When you log into T-PAX with the new system generated password, a message will appear that your password is older than 90 days and you must change it. The NEW password requires of a minimum of 9 characters with a minimum one upper case, one lower case and one numeric character. The screen that appears after clicking OK will only allow the logon password to be changed. After changing the logon password the TPAX Traveler View screen will appear.
2. To change your **secondary password**, click on the Tools drop down and click on Change Passwords. Currently T-PAX will only recognize the old/current secondary password in ALL UPPERCASE LETTERS. This is how it must be entered into the "old password" field. Reset your secondary password using the same requirements as above to be in compliance with AIS password requirements.

Having trouble with your secondary/confirmation password?

Try entering it in all uppercase letters (e. g. "*Test1234#*" would be entered as "*TEST1234#*"). Secondary passwords stored in the system prior to the upgrade on 10 June were inadvertently converted to all uppercase letters



To change Secondary Password: Click Tools | Change Passwords

Enter the current (the one provided in the email) secondary password in the "Old Password" field. Enter it in all UPPERCASE LETTERS, e. g. "Test36890" would be entered as "TEST36890". Then create and confirm your new secondary password and click OK.

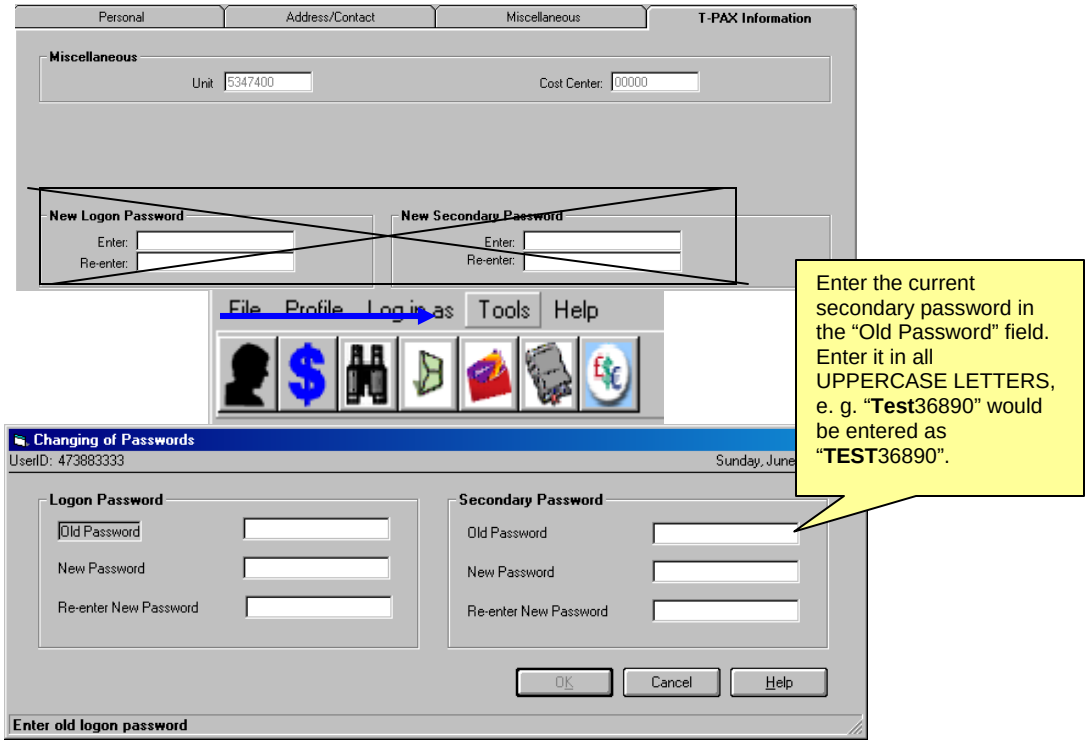
Enter the current secondary password in the "Old Password" field. Enter it in all UPPERCASE LETTERS, e. g. "**Test**36890" would be entered as "**TEST**36890".

Continued on next page

Self-Service Password Reset, Continued

Reset/Change Passwords

Due to security issues, users may no longer change their T-PAX passwords in their profile on the T-PAX Information tab. These fields have been disabled. To reset/change T-PAX passwords, please click the Tools menu and then Change Passwords. You will be required to enter in the "Old Password" prior to resetting/changing. If you have used the above "forgotten password" button, please type the system random generated password into the "Old Password" field.

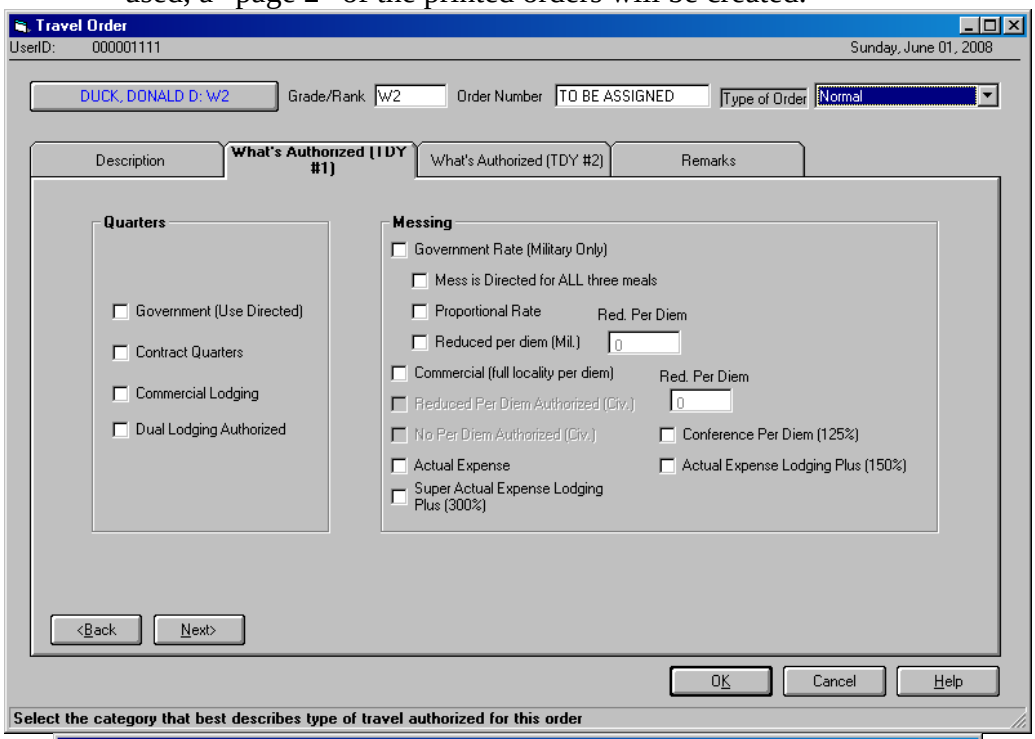


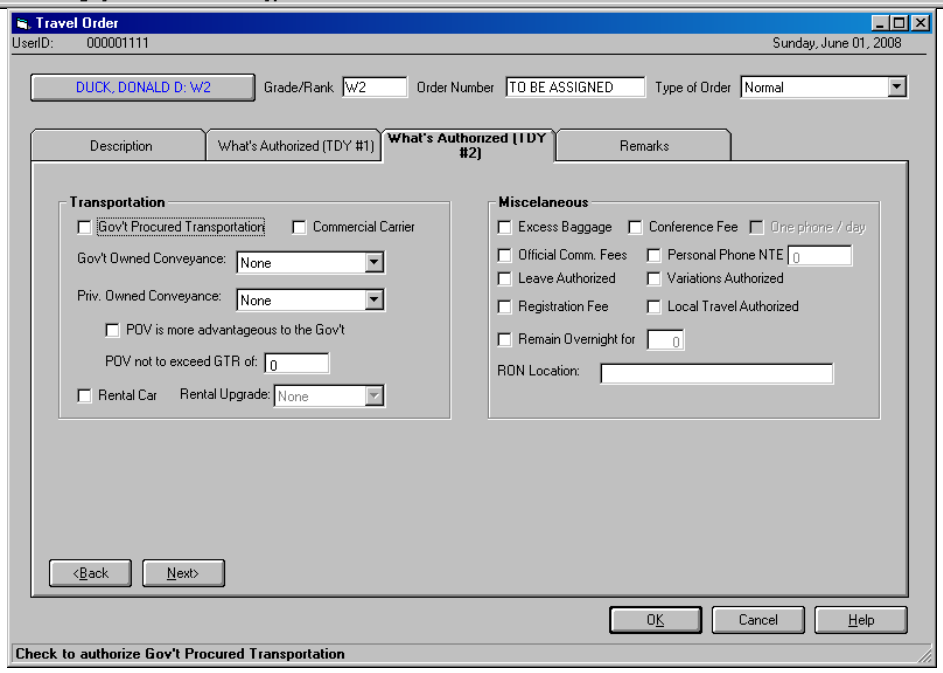
What's New for the field in T-PAX Version 6.10

Orders

What's Authorized Tabs

These tabs have been expanded and updated to provide accurate orders. All authorized entitlements marked on these two tabs will print on the orders as well as what is input on the Remarks tab. Should extensive entitlements be used, a "page 2" of the printed orders will be created.

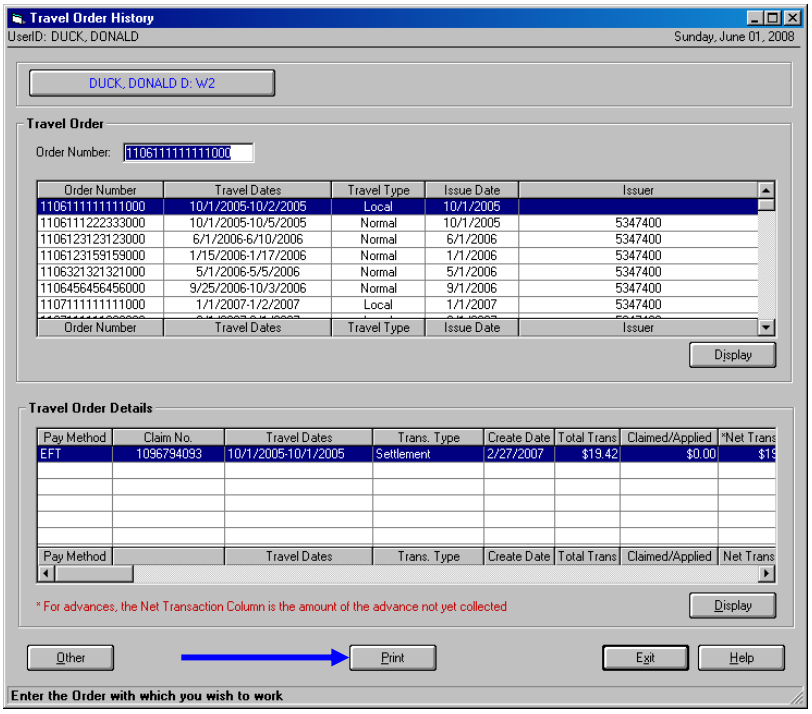




Printing Travel Voucher Summaries (TVS)

Print TVS from order history

Users may now print a TVS from the Travel Order History screen by highlighting the TONO and settlement and clicking the print button at the bottom of the screen and then selecting Print Voucher.



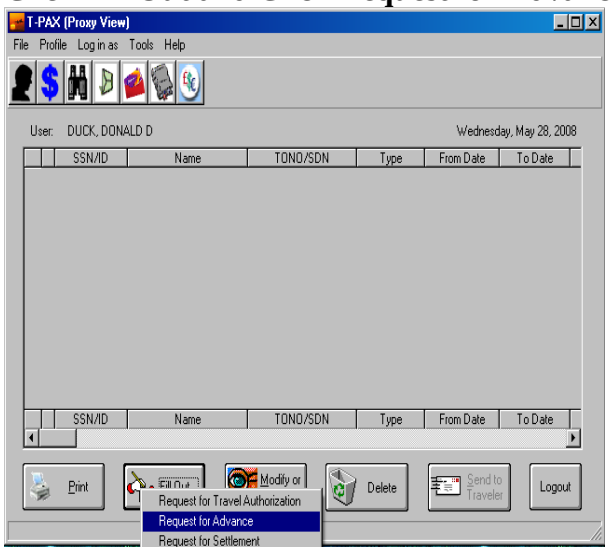
Advance Signature Proxy (ASP)

Introduction

Advance Signature Proxy (ASP) – This function is for SPO's. This permission/designation is granted after the completion of a new form CG PSC-7421 (http://www.uscg.mil/hq/cg1/psc/forms/psc7421.pdf)

Procedure

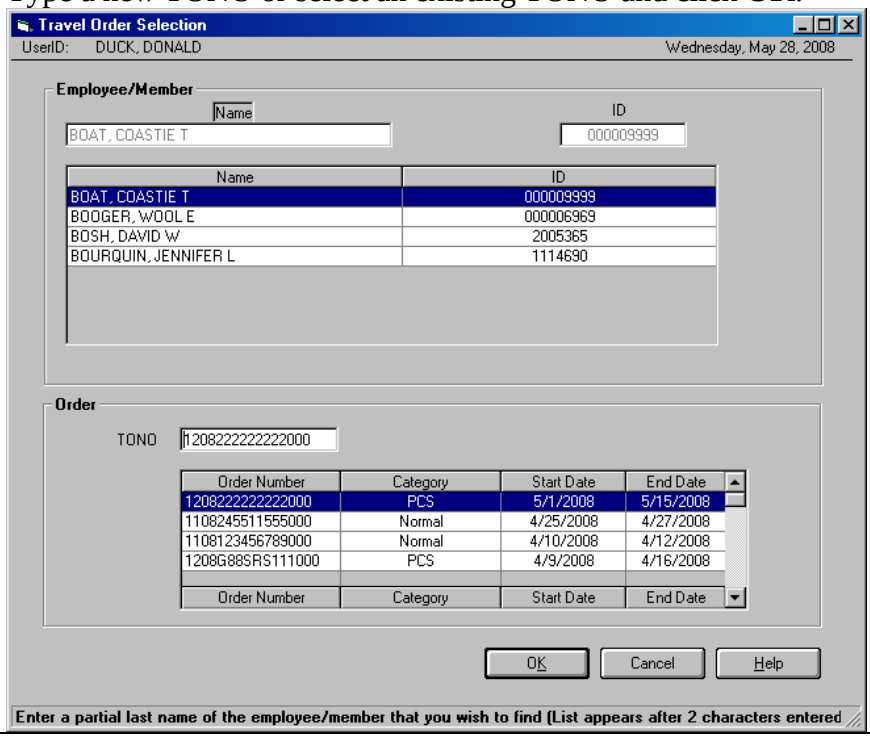
Follow these steps to request a travel advance as an ASP.

Step	Action
1	Sign into T-PAX and change your view by selecting "*Log in as Proxy*" from the menu bar.
2	Click **Fill Out and Click Request for Advance**.  Note: Although other options appear, they are not available as an Advance Signature Proxy.
3	Type the traveler's name that the advance is to be completed for and click OK.

Continued on next page

Advance Signature Proxy (ASP), Continued

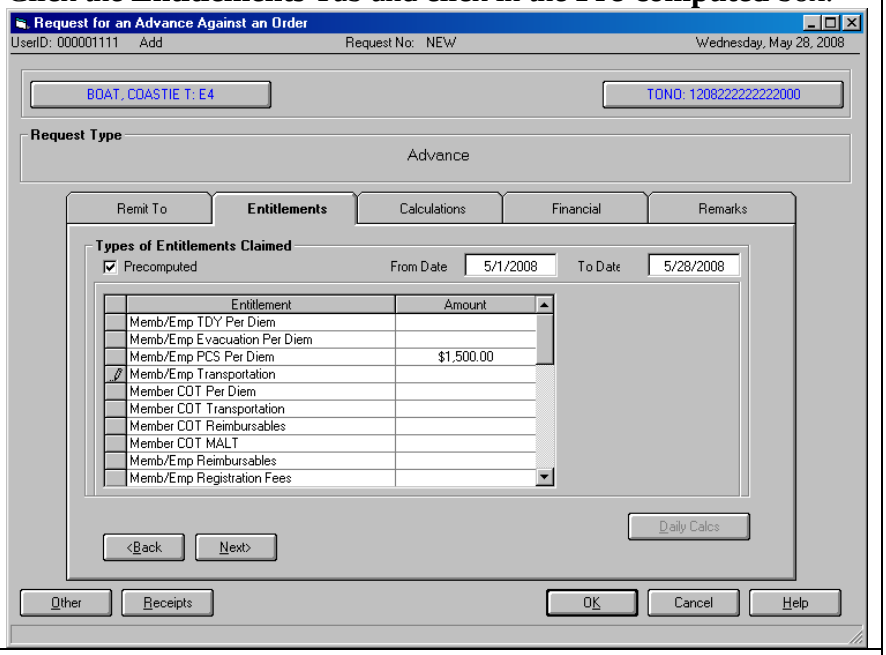
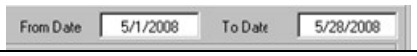
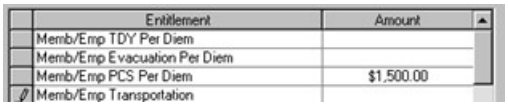
Procedure **(continued)**

Step	Action
4	Type a new TONO or select an existing TONO and click **OK**. 

Continued on next page

Advance Signature Proxy (ASP), Continued

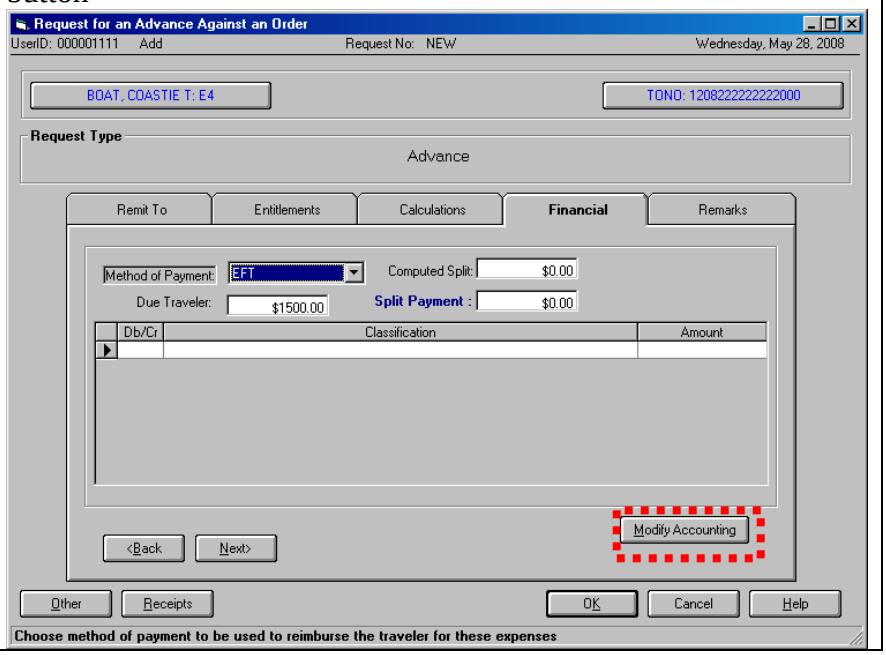
Procedure **(continued)**

Step	Action
5	Click the **Entitlements** Tab and click in the **Pre-computed** box. 
6	Enter the dates for the advance in the **From Date** and **To Date** fields. 
7	Enter the **advance amount** into the **Entitlement Amount** field.  Note – You cannot input amount larger than value of entitlement.

Continued on next page

Advance Signature Proxy (ASP), Continued

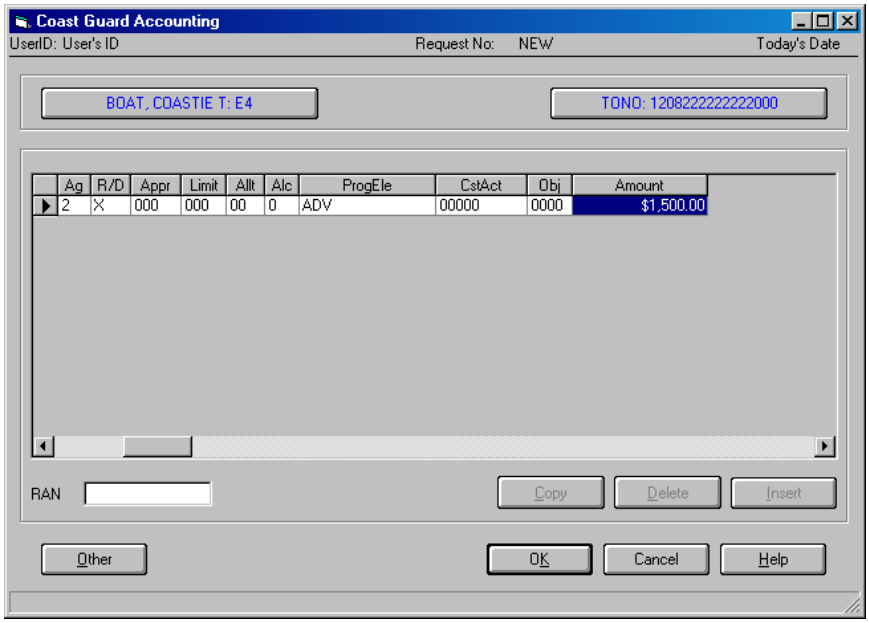
Procedure **(continued)**

Step	Action
8	Click the **Financial Tab** and then click the **Modify Accounting** button 

Continued on next page

Advance Signature Proxy (ASP), Continued

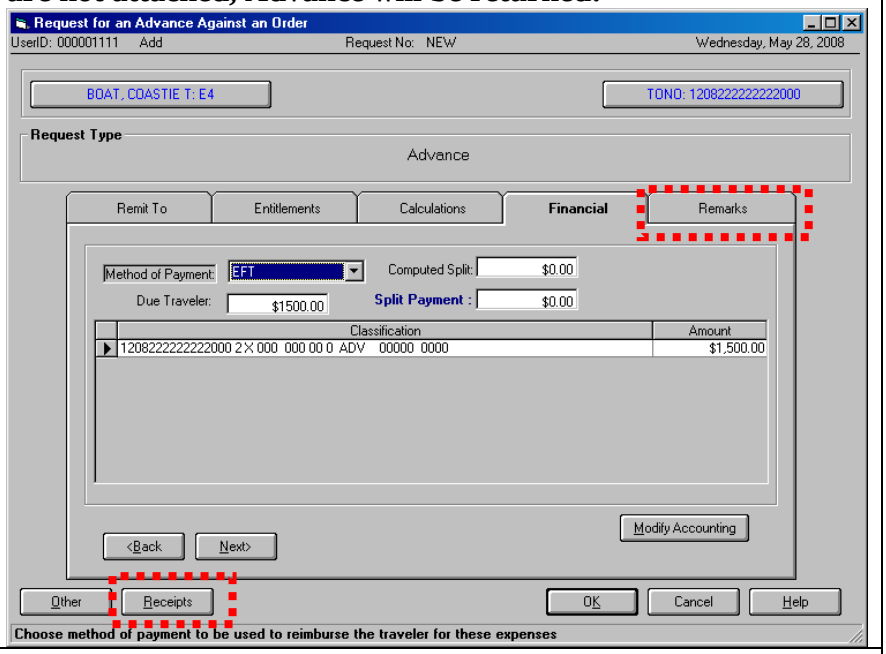
Procedure **(continued)**

Step	Action
9	On the **Coast Guard Accounting** screen click **OK** Note: **DO NOT** change this line of accounting…this is a default used for advances. 

Continued on next page

Advance Signature Proxy (ASP), Continued

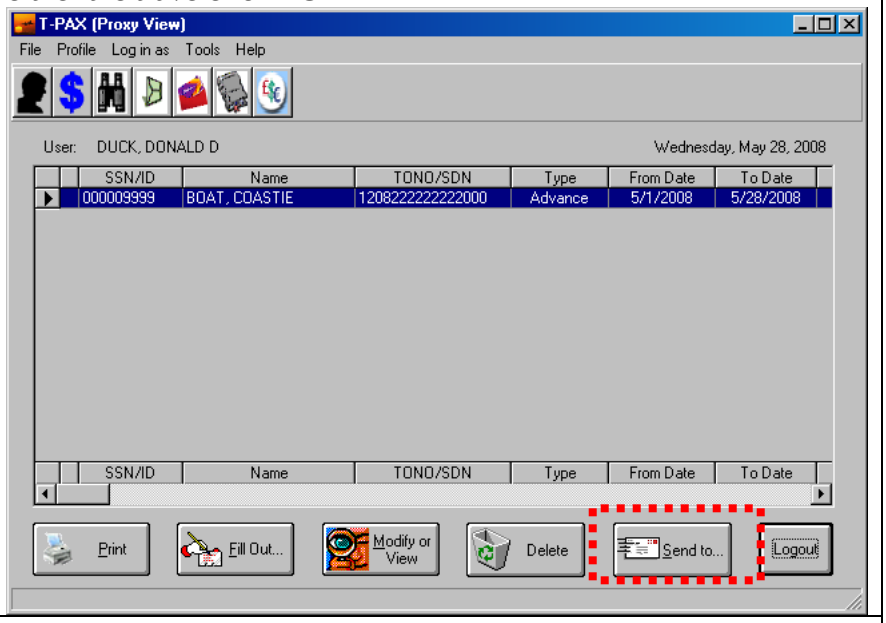
Procedure **(continued)**

Step	Action
10	Enter remarks if required and use the Imaging Function (by clicking the **Receipts** button) to attach **SIGNED** Orders. **If orders are not attached, Advance will be returned!** 
11	When complete, click the **OK** button on the **Request for Advance against an Order** screen.

Continued on next page

Advance Signature Proxy (ASP), Continued

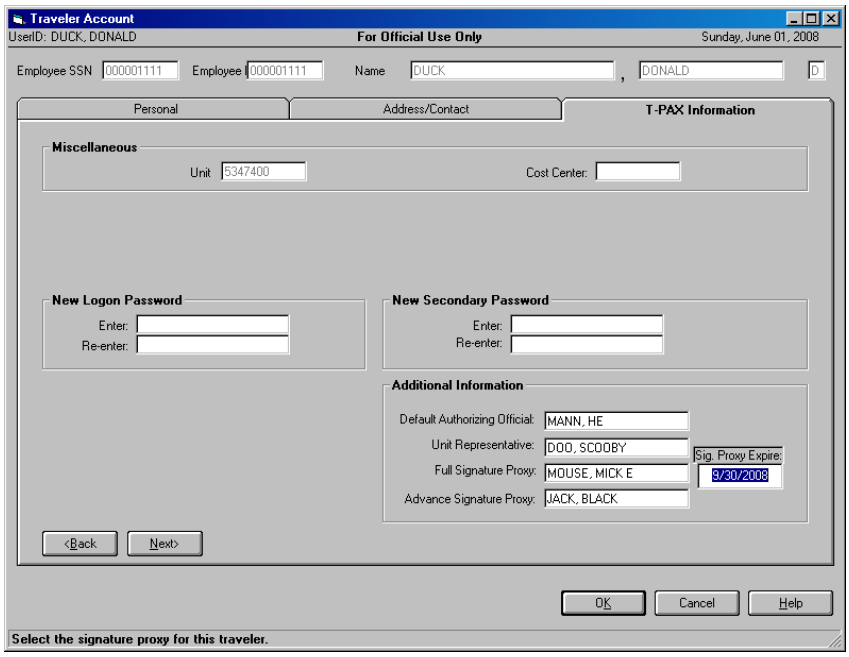
Procedure **(continued)**

Step	Action
12	Click the **Send to** button – this will give the opportunity to send to either the traveler or AO 
13	Once submitted to the AO, follow same procedures as approving a settlement.
14	ALL advances will be screened by PSC (tvl).

Proxy Expiration Date

Set date on profile tab

When a T-PAX user elects to assign a "Full Signature Proxy" an expiration date is recommended to be placed in the Signature Proxy Expire field. It is recommended a one year designation period be assigned.

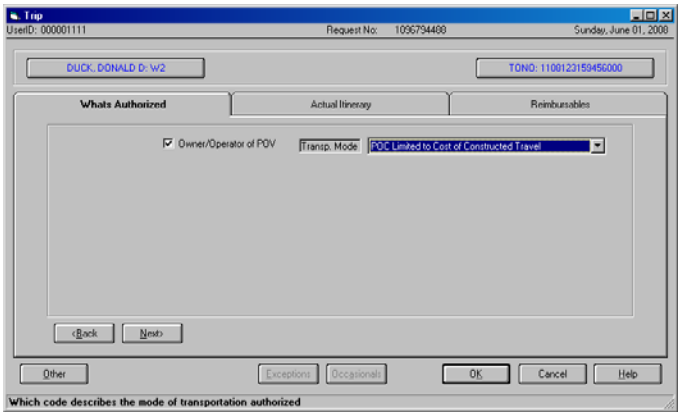


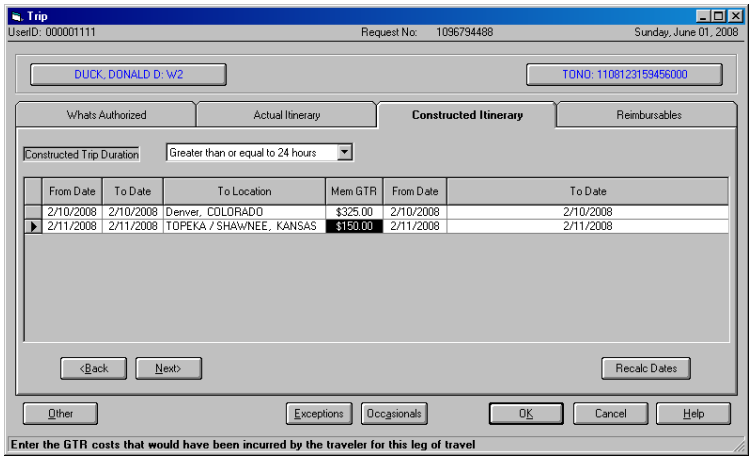
Travel Limited to Cost of Constructed Travel

Entering Cost of a GTR

When this transportation Mode is selected on the What's Authorized screen of the settlement, users will see a new screen appear.

a. On the Constructed Itinerary, users must enter the Mem GTR costs for each leg of the trip. Please reference travel regulations to calculate this cost.
b. T-PAX will then pay the lesser of the two costs – actual expense as input in the Itinerary or the Constructed Cost input on the Constructed Itinerary.
c. DO NOT put the Cost of the GTR in the reimbursable screen or user will be overpaid.
d. On the Entitlement page, click the Cons. Comp button and the screen will show you what T-PAX is going to reimburse for each leg, either the Actual cost of the Constructive cost.





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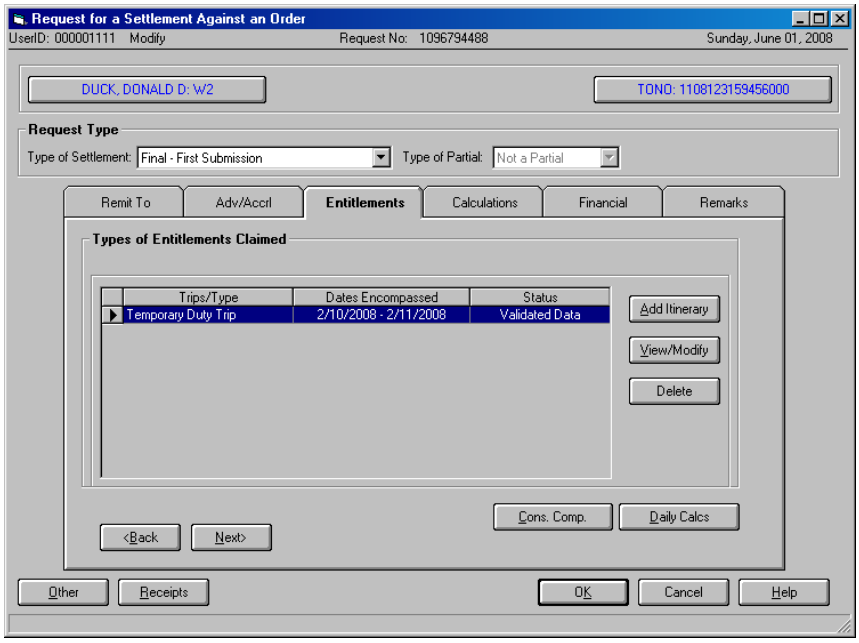
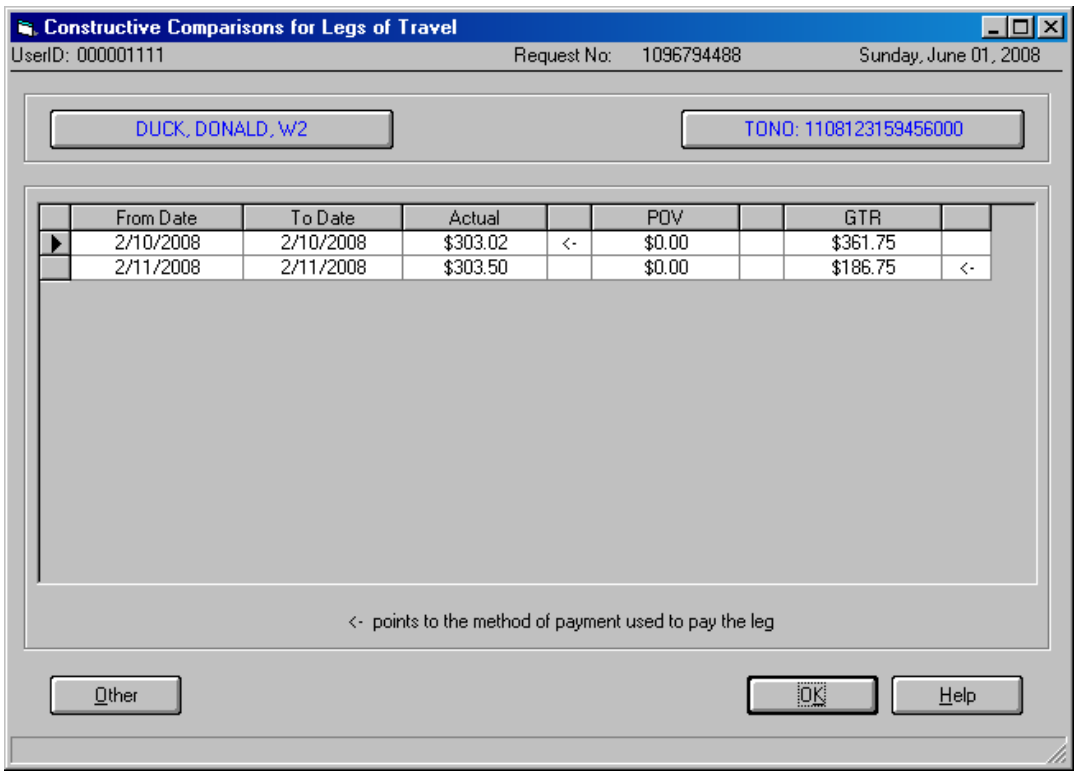
Travel Limited to Cost of Constructed Travel, Continued

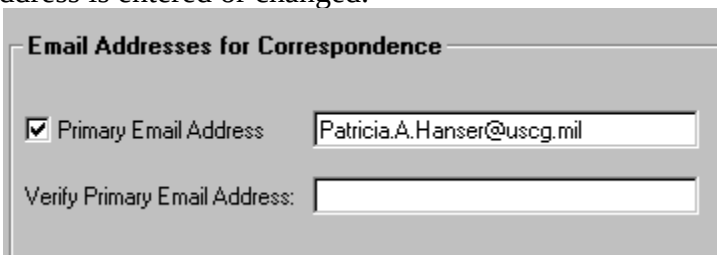




Validate/Verify Email Addresses

Email Address entry

It is important that all Email addresses are kept current in T-PAX. To ensure email addresses are correct, T-PAX will now require a validation entry when the email address is entered or changed.



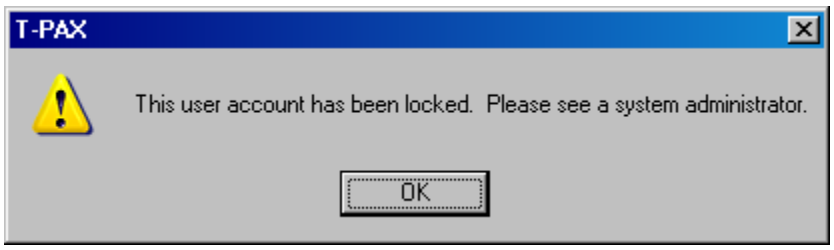
Locked Accounts

Locked Accounts

Locked T-PAX Accounts -

a. A T-PAX account may be locked by the system administrator for a few reasons. Examples include:
   i. Separated employee
   ii. Non USCG person without T-PAX Profile Creation Form

b. Should you get the below error message, please contact PSC Customer Care for assistance.



What's New for the field in T-PAX Version 6.10

New User Access/Proxy/AO Designation Form

New Form to be in use soon

CG PSC 7421 (2008 Revision) – Mentioned above was the new T-PAX/WinIats User Access Authorization & Approving Official (AO) Designation Form. **This form is currently in the "DRAFT" stage**. Once final approval is given, this form will be made available to the field via the PSC Forms web page. This form will supersede previous versions.

Department of Homeland Security
U. S. Coast Guard
CG PSC 7421 (Rev. 05/08)

Tpax/Winlats User Access Authorization & Approving Official (AO) Designation

1. User's Name (Last, First, MI.) (Please print)
2. Rank/Rate:
3. Employee ID # (**Not SSN**)
4. Official Duty Station & **OPFAC**
5. Area Code & Work Phone Number:
6. e-Mail address:

7. User Role Description (see instructions)(Include current roles, this authorization supercedes all of your previous authorizations):

TPAX (Travel Preparation & Examination System Permissions)

- ☐ ***Create "Non-CG Employee" Self Service User Profile***
- ☐ TPAX AO (Authorizing Official) Permissions
  - ☐ Date of Expiration:_____
- ☐ Advance Signature Proxy Permissions
  - ☐ Date of Expiration:_____
- ☐ Customer Service Representative Permissions (PSC Only)
  - ☐ Date of Expiration:_____
- ☐ System Administrator (PSC TVL Only)
  - ☐ Date of Expiration:_____

Winlats Access Permissions (PSC TVL Only)

- ☐ Examiner Permissions
- ☐ Auditor Permissions
- ☐ Distribution Permissions
- ☐ System Administrative Restricted Permissions
- ☐ System Admin Permissions (full)
- ☐ Super User Permissions (system suppt users only)

Web/Image flow Access Permissions (PSC TVL Only)

- ☐ Examiner Permissions (all travel folders) Exception:_____
- ☐ System Admin Permissions (all travel folders)

(JUMPS and Direct Access are separate permission forms that must be filled out separately.)

Scope of Authorization

Subject to the limitations that follow, the user is authorized access to the computer systems identified above. This authorization contains no implied authorization to access any computer system of the United States Government not specifically identified herein. Authorization will be revoked upon separation, retirement, reassignment of duties, change of organization or when determined by the Information Systems Security Officer to be in the best interest of the Government.

WARNING: Only Authorized Users May Use These Systems.

To protect these systems from unauthorized use and to ensure that these systems are functioning properly, system administrators monitor these systems.

Individuals using these systems without authority, or in excess of their authority, are subject to having all of their activities on these systems monitored and recorded by system personnel. In the course of monitoring individuals improperly using these systems, or in the course of system maintenance, the activities of authorized users may also be monitored.

Anyone using these systems expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, management may authorize system personnel to provide the evidence of such monitoring to law enforcement officials.

8. **Cmd Designation** *(Signature &**printed** name, Rank, Title (CO/OIC, XO/XPO or HQ/CGPC/AREA/MLC/DIST Branch Chief) & Phone Number):*
I certify that the access I have authorized is based on an official need. I'm aware of the general functionality I have authorized and I'm aware of what this will allow this member to complete. This member has demonstrated that they are knowledgeable in the use of the program I've authorized and has my confidence that they will diligently make entries and if in doubt they will seek assistance. I also acknowledge that if I lose confidence in this member for any reason I have a responsibility to withdraw this authorization.

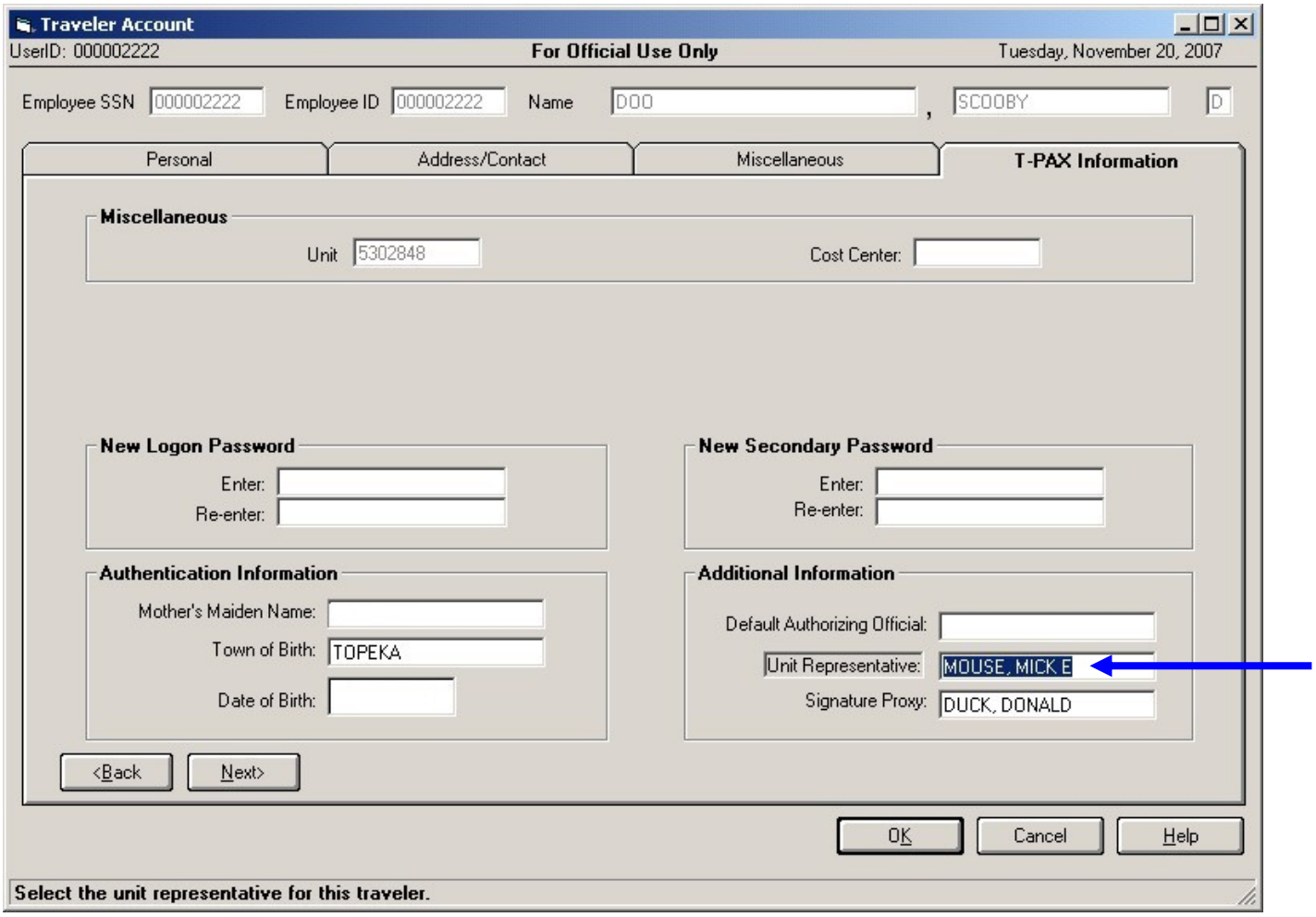
9 Date:

What's New for the field with WinIats/Tpax Version 6.09

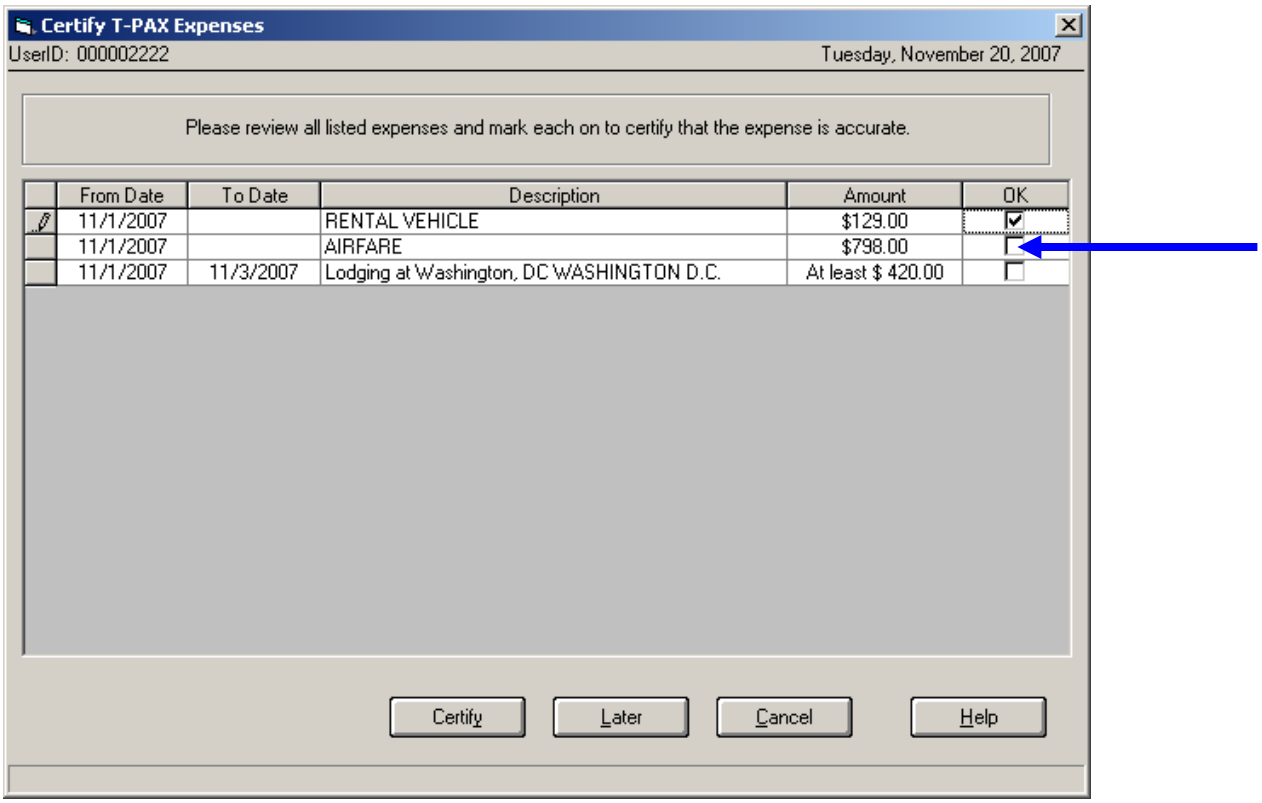
1. Tpax now has a system generated password that goes to member's primary email account that is listed in Tpax when member clicks on **Forgotten Password** button.

Note the use of your "***primary email address***". You must have an email address listed in your Tpax user profile and the Primary checkbox must be marked in order for the password reset feature to work.

2. Unit Representative View – member can now select someone within their own OPFAC to be their designated Unit Representative. This will allow the selected individual to view the traveler/AO box/claims and certain profile information to assist with any problems the traveler/AO may be having. This is done in the member's profile.

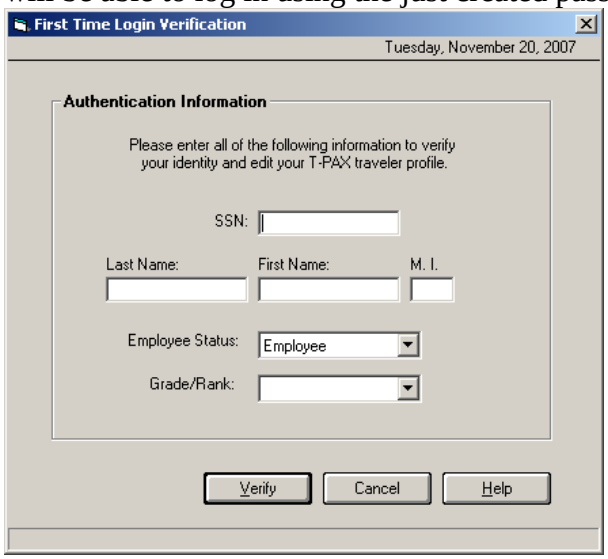


3. Validate Expense Report – a new screen will pop up once the claim is input by the traveler where the system will show a listing of miscellaneous expenses claimed by member and the amount. Member must review to validate each expense (this is being done to help members catch any potential errors…i.e. $1500 in taxi fares vs. $15.00).



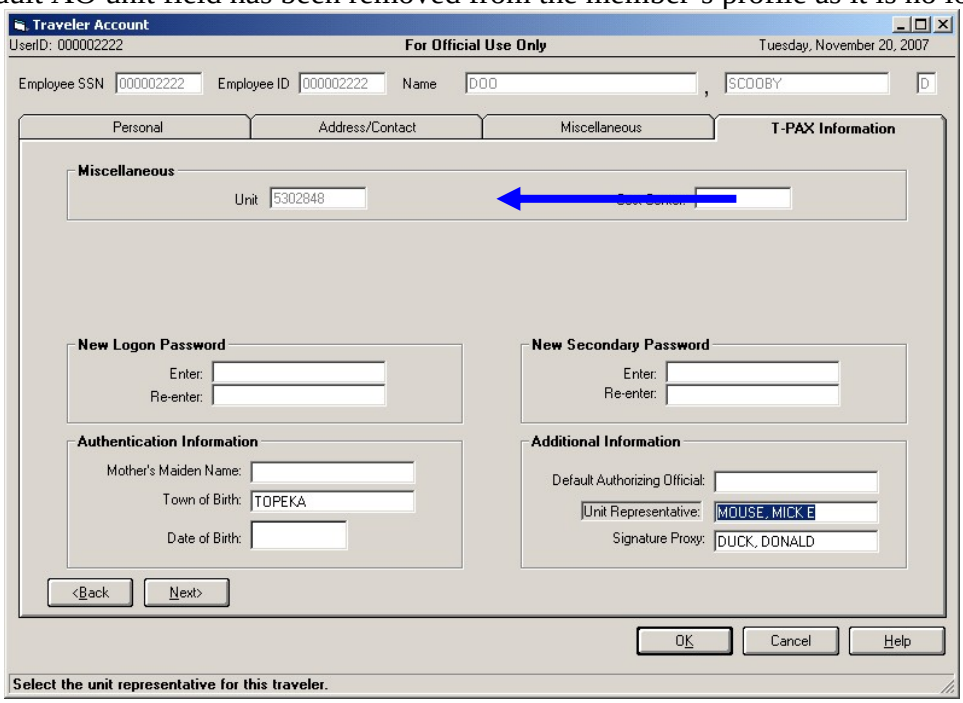
4. Date field entered to show the date the password was last changed to ensure Tpax passwords are required to be changed every 90 days.

5. Increased First time login Verification – when a member is initially loaded into the TPAX, they will need to complete an authentication information screen. If the information is not correct, the system will not allow you into Tpax, if it is correct member will be taken to Tpax profile to be completed. Members will be able to log in using the just created password.

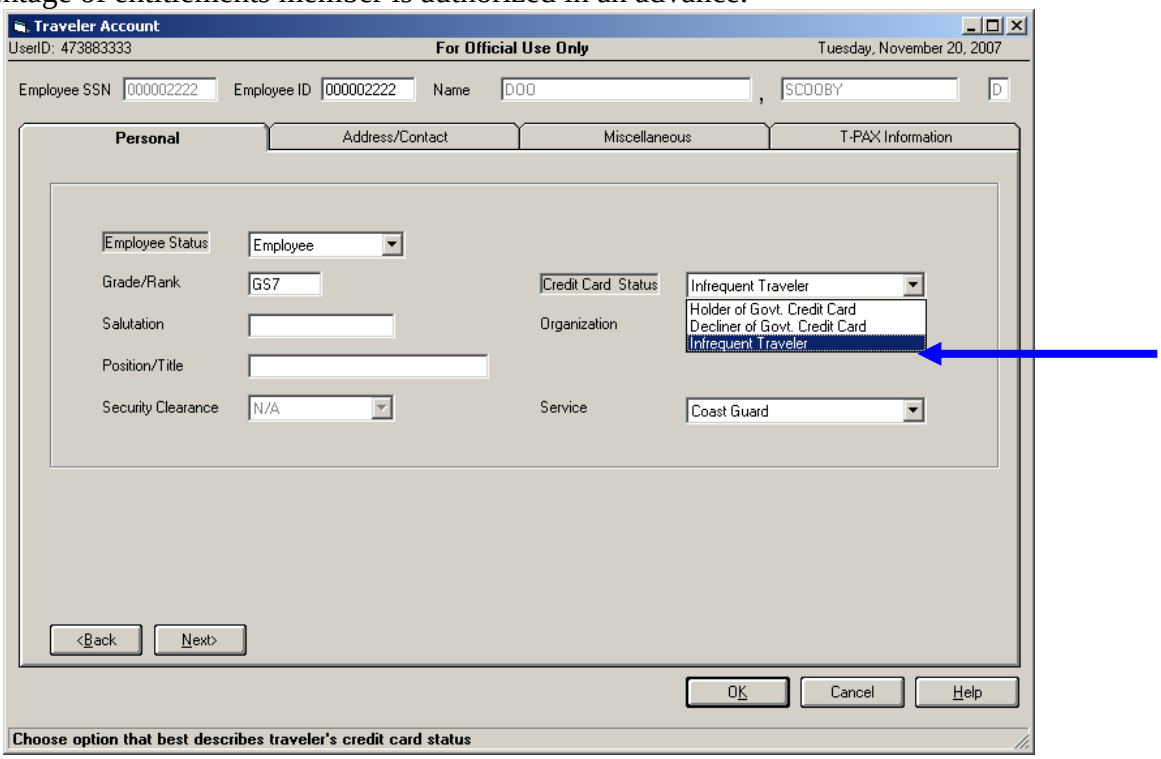


6. AO authorization may have expiration dates that will allow the system to automatically revoke on that date.

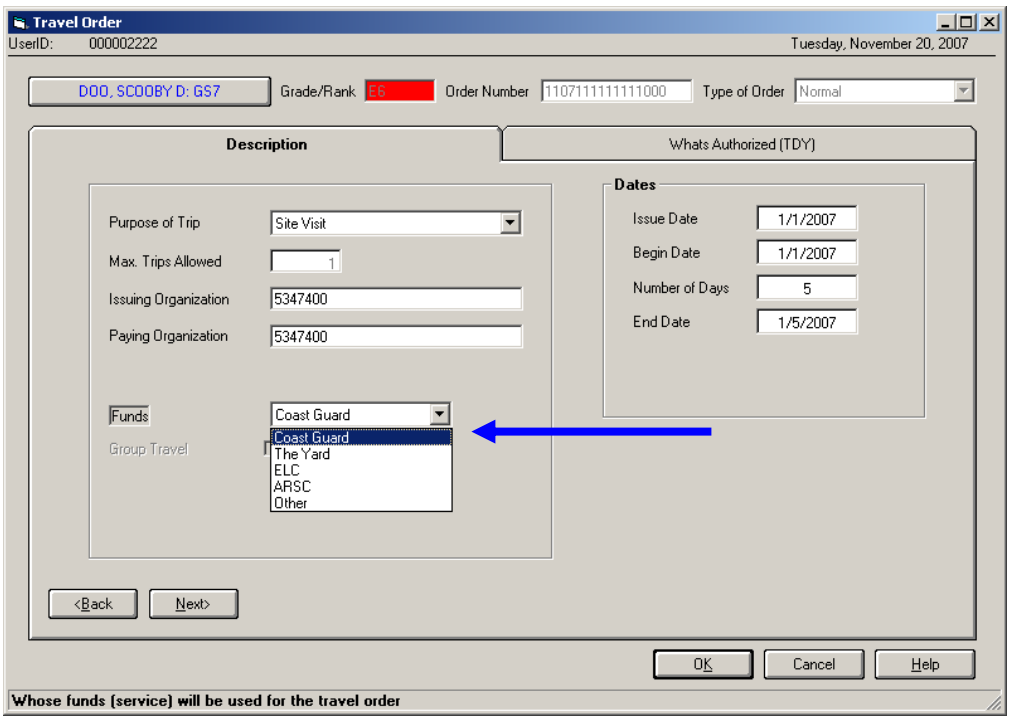
7. The default AO unit field has been removed from the member's profile as it is no longer required.



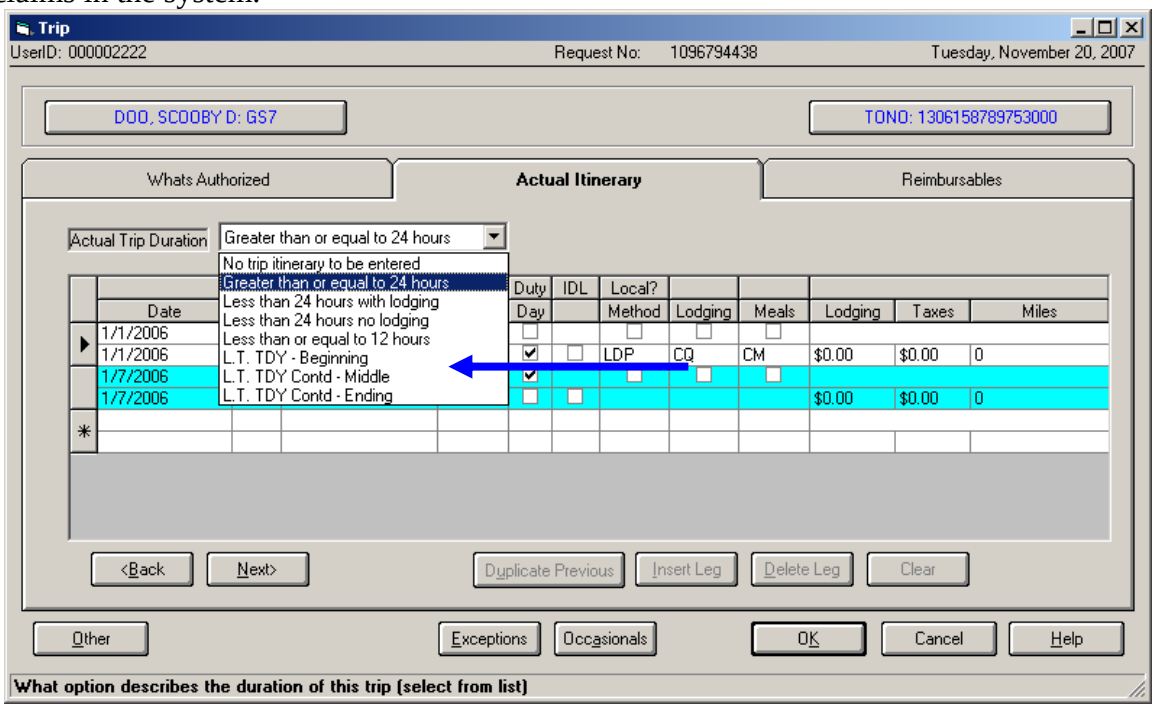
8. Members may now update their profile to indicate Credit Card Status (Holder of Govt. Credit Card, Decliner of Govt. Credit Card, Infrequent Traveler). This status will determine the percentage of entitlements member is authorized in an advance.



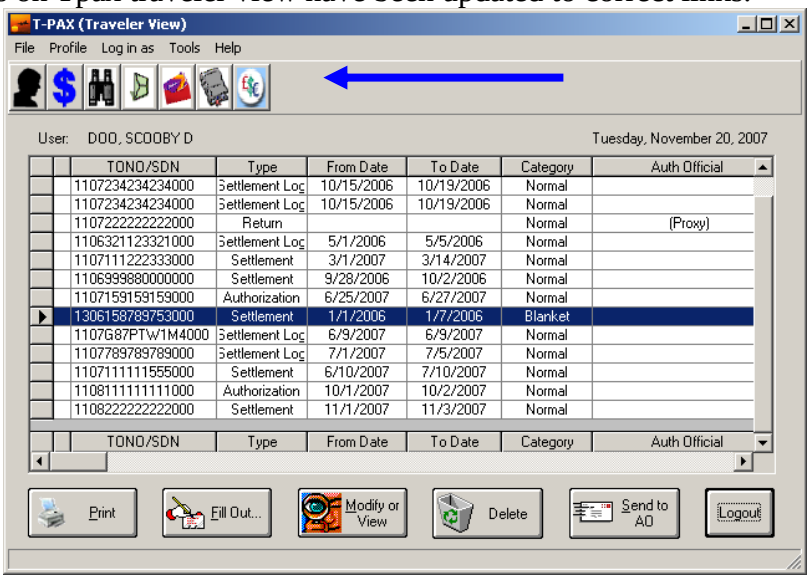
9. Fund type (Coast Guard/ELC/YARD/ARSC) determines Debt letter selected – to allow the member to receive the correct debt letter, the debt letter will be produced IAW the fund type selected.



10. Long term TDY will use “Long Term Cont TDY” option within the itinerary portion of the travel claim to complete settlements. Partial Settlement type – has been removed from TDY type travel claims in the system.

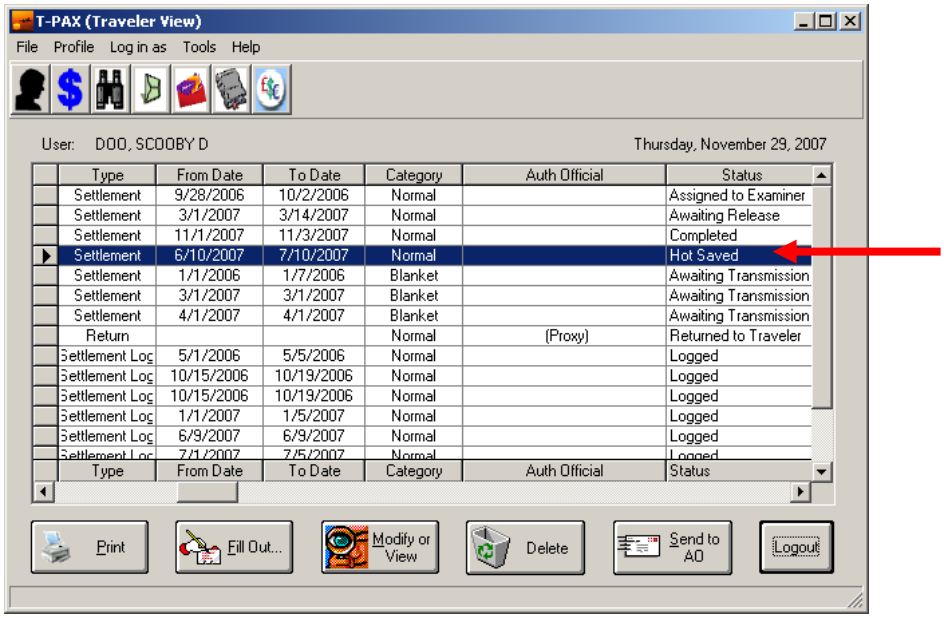


11. Hyperlink boxes on Tpax traveler view have been updated to correct links.

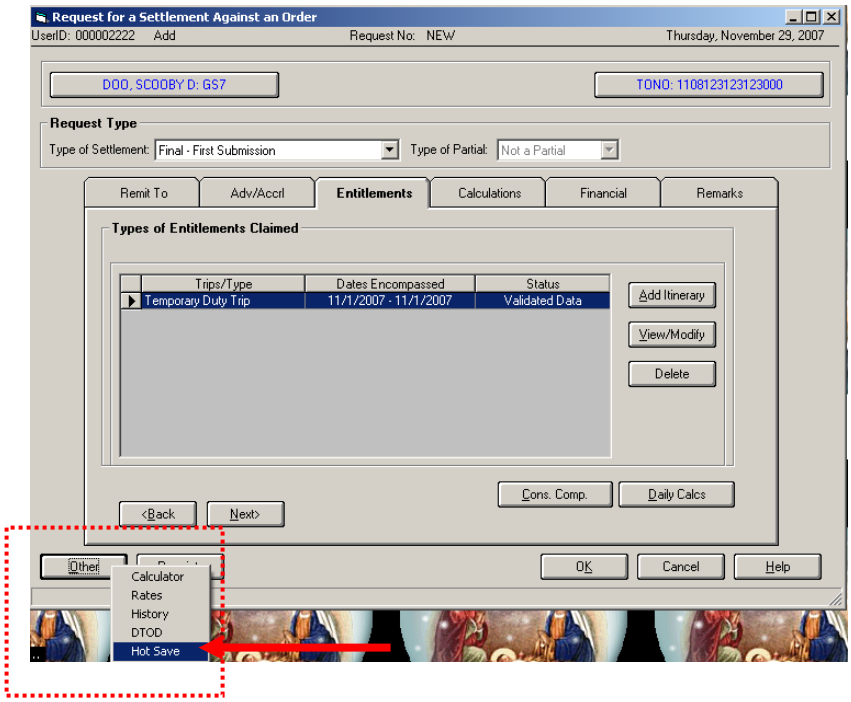


“HOT SAVED” Status

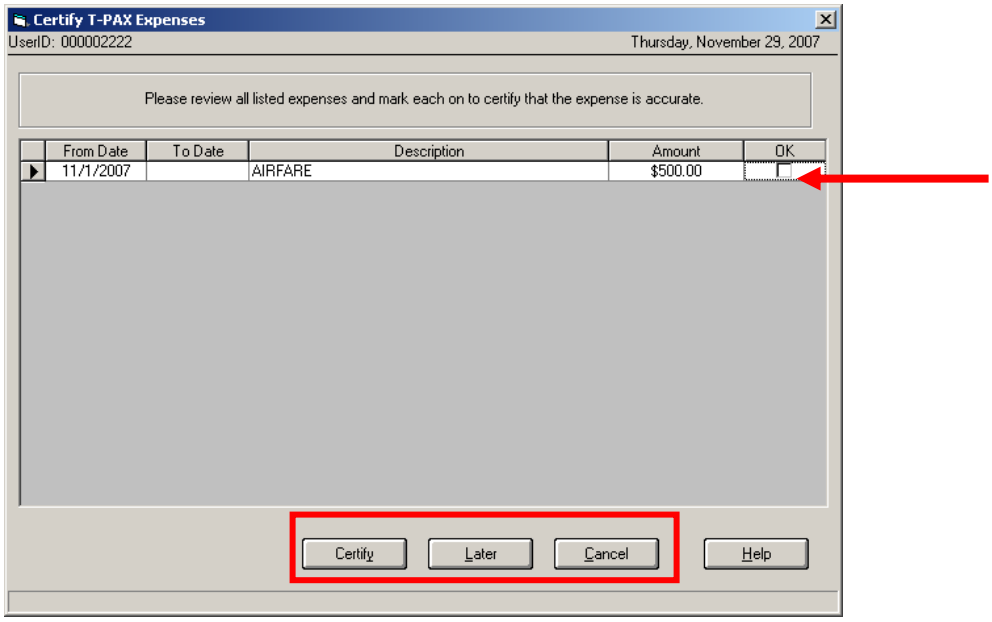
1. There is a new feature in Tpax which allows a member to temporarily save a claim that has not been completed. This will put the claim in the status of “Hot Saved.”



2. This function happens two (2) ways:
   a. Input a partially completed claim, and then on the screen below click the “Other” (at the bottom of the screen, left side) button to click on the “Hot Save” button. This will save your claim in a “Hot Saved” status allowing you to complete it at a later time.

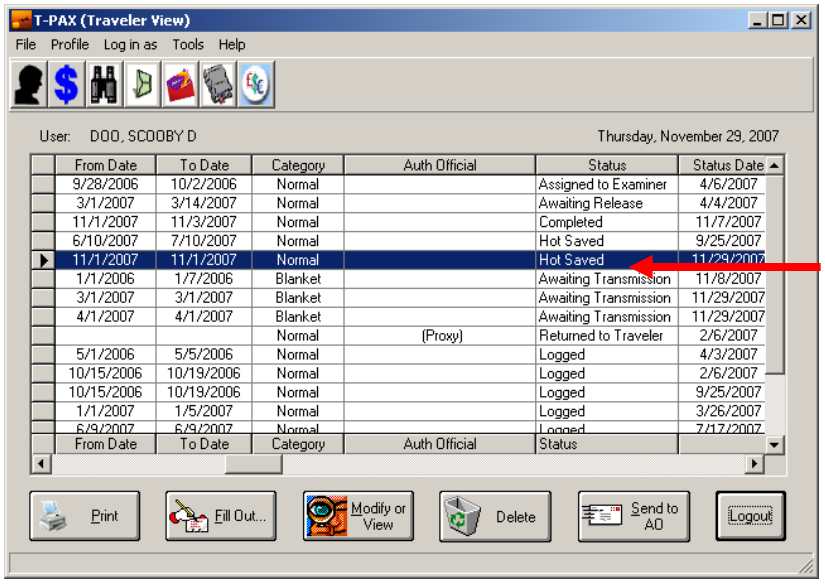


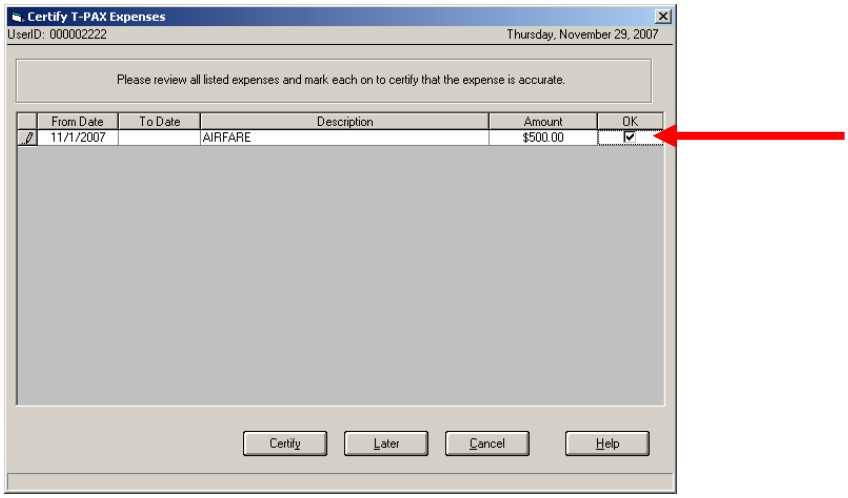
b. After completing your claim and clicking on the OK button, a “Certify Tpax Expense” screen will show up. You are supposed to verify each expenditure by clicking the “OK” box next to each expense amount. Once you have done that you may click “Certify.” If you don’t have your receipts to verify the amount, you may click the “Later” button which will put the status in a “Hot Saved” status to allow you to come back later to certify the expenses.

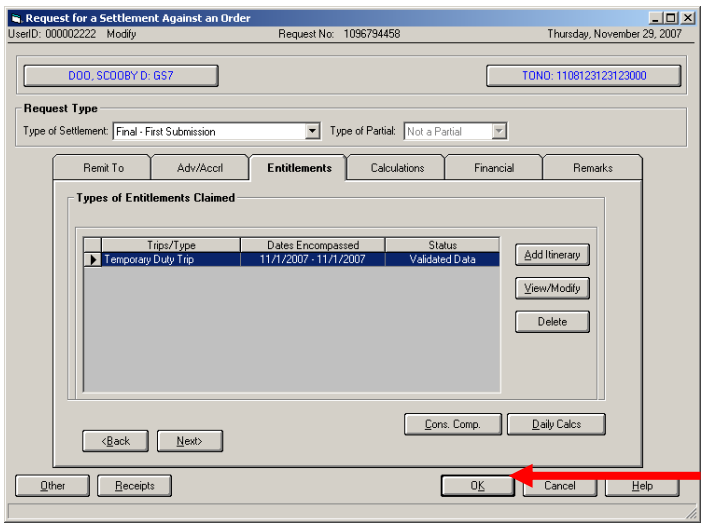


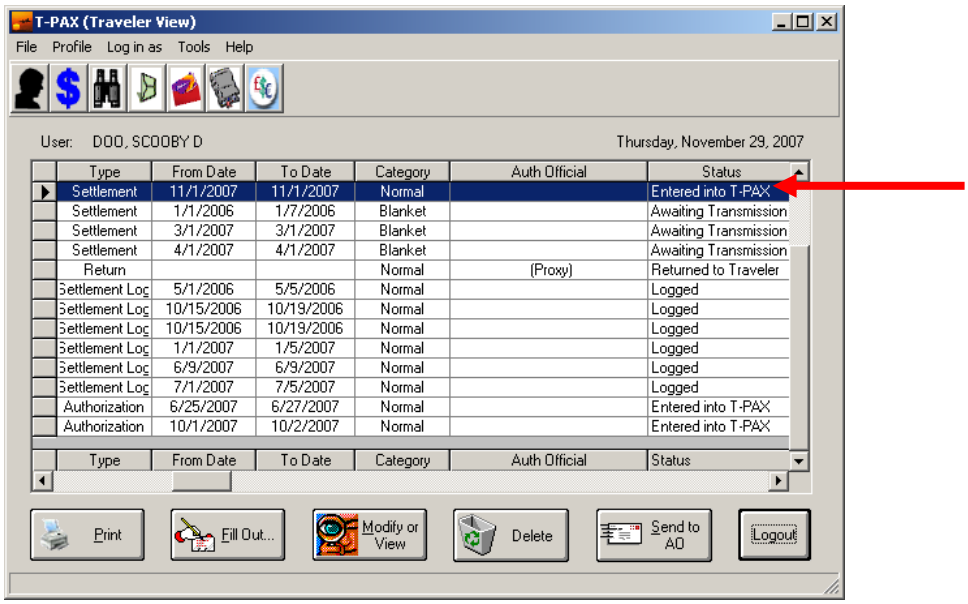
c. If you click on Cancel in the above screen, the system will take you back to the claim to make any necessary corrections.

3. Once a claim is placed into a “Hot Saved” status, a traveler needs to highlight the claim and double click it to reopen the claim and finish processing the document.





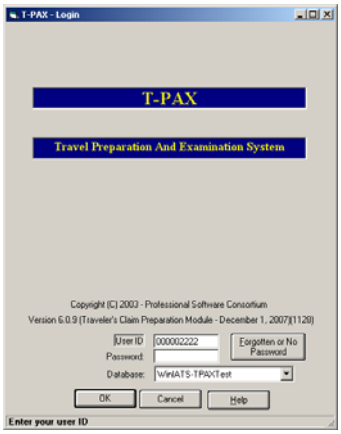




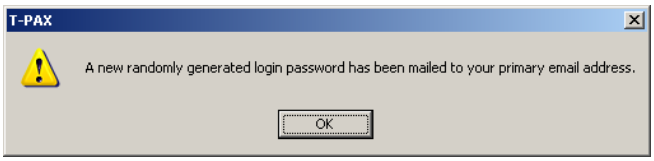
4. Once this is done and the claim is completed, when the traveler clicks OK the claim status will change to “Entered into T-Pax” and then can be forwarded to the AO.

TPAX (Ver. 6.09) Forgotten Password Button Enhancement

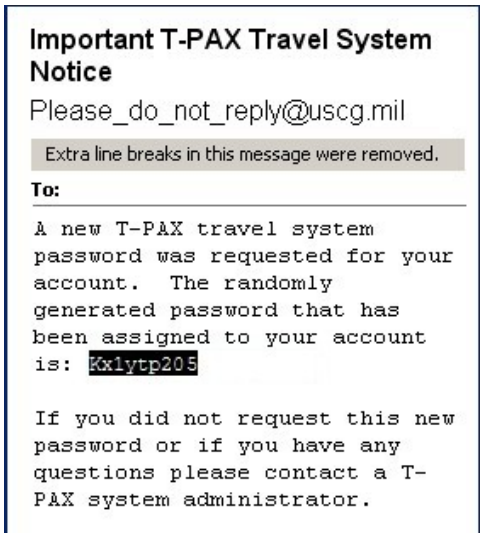
1. If you forget your password, there is a “Forgotten or No Password” button on the main logon screen to TPAX.
    a. Enter your UserID and click the “Forgotten or No Password” button



2. You will see the below popup box indicating an email has been sent to your primary email address listed in your TPAX profile.
    a. Click “OK”

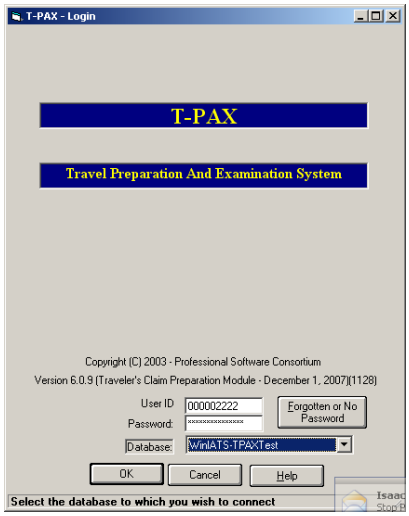


3. Open your primary email account to retrieve the system generated password.

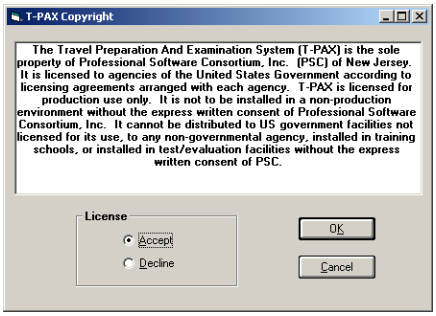


    a. Highlight the password given, right click and copy the password.

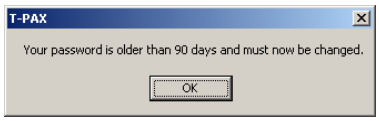
4. Return to the TPAX logon screen, right click and paste the password into the password field then click the “OK” button.



5. Click the radio button next to Accept and click “OK” on the screen below.

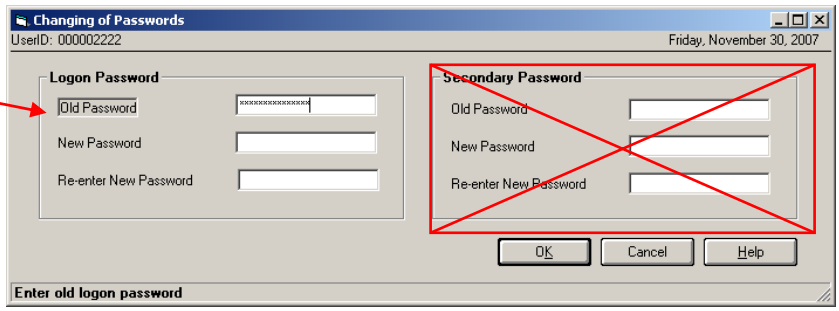


6. A screen will pop up indicating your password is older than 90 days and must now be changed. **This is referring ONLY to your logon password. Click the OK button.



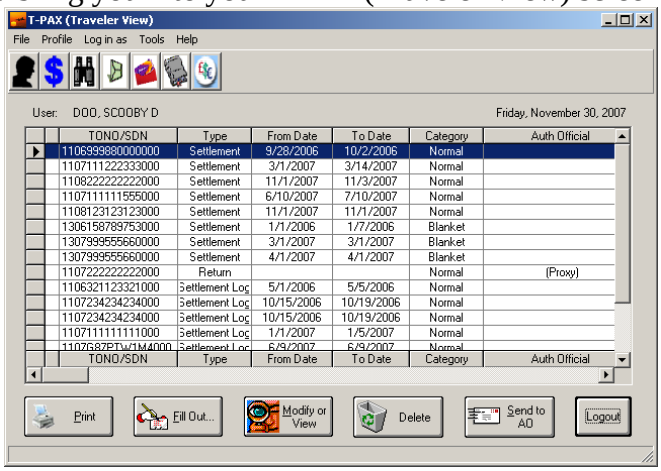
7. This will bring up the below screen where you will right click in the “Old Password” field and paste the password the system generated for you.

“Old” means the password you just received, via email, (see step 3). It should still be on your ‘clipboard’, just right mouse click and select “Paste” to fill it in.

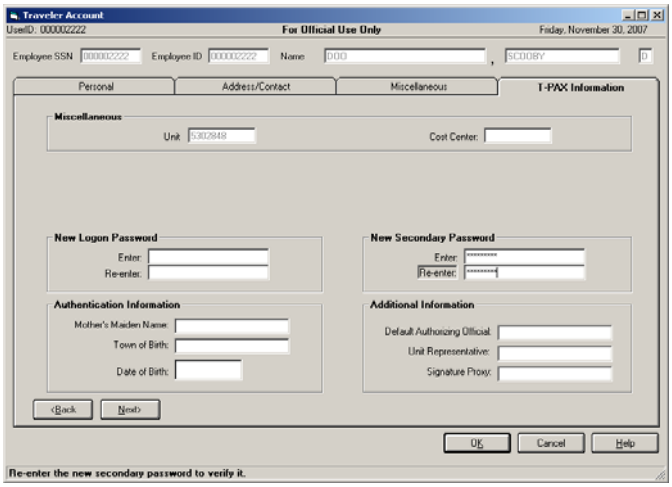


a. Then enter in your New Password and Re-enter the New Password in the appropriate fields and click OK.
    i. Note: You do not have to fill out the SECONDARY PASSWORD information for this process (See step 9).
    ii. New passwords must be **exactly 9** characters in length, consisting of at least 1 number 1 lowercase letter and one upper case letter. **Passwords are case sensitive.**

8. The system will now bring you into your TPAX (Traveler View) screen.



9. If you have forgotten your Secondary/Confirmation Password, click on the profile icon - , which will take you into your TPAX profile screen.
    a. Click on the TPAX Information Tab.
    b. Enter in your New Secondary Password and Re-enter it for conformation.
    c. Click OK to save your password information and return to the TPAX (Traveler View) screen.



Reminder: New passwords must be **exactly 9** characters in length, consisting of at least 1 number 1 lowercase letter and one upper case letter. **Passwords are case sensitive.**

Update 26 November 2007 (Version 6.09):

Increased First time login Verification – when a member is initially loaded into the TPAX, they will need to complete an authentication information screen. If the information is not correct, the system will not allow you into Tpax, if it is correct member will be taken to Tpax profile to be completed. Members will be able to log in using the just created password.

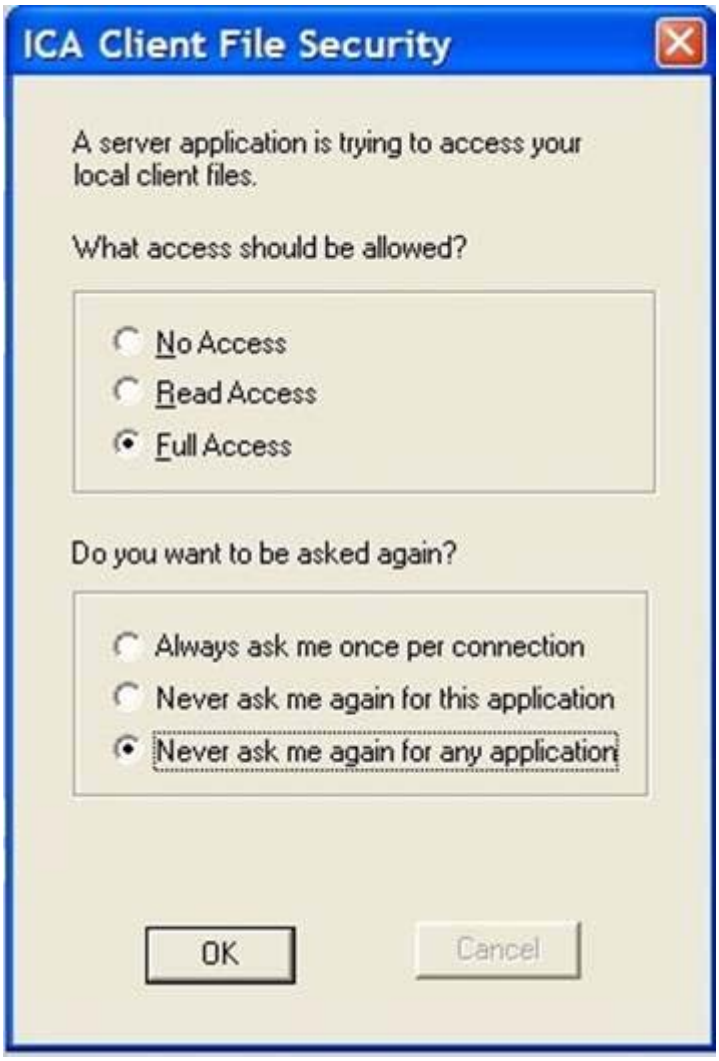
TPAX Initial Logon

Printer friendly version of these instructions.

Start Internet Explorer and navigate to this link:
http://cgweb.fincen.uscg.mil/metaframe.htm and click the link "Launch TPAX Application" link in the right-hand column of the page.

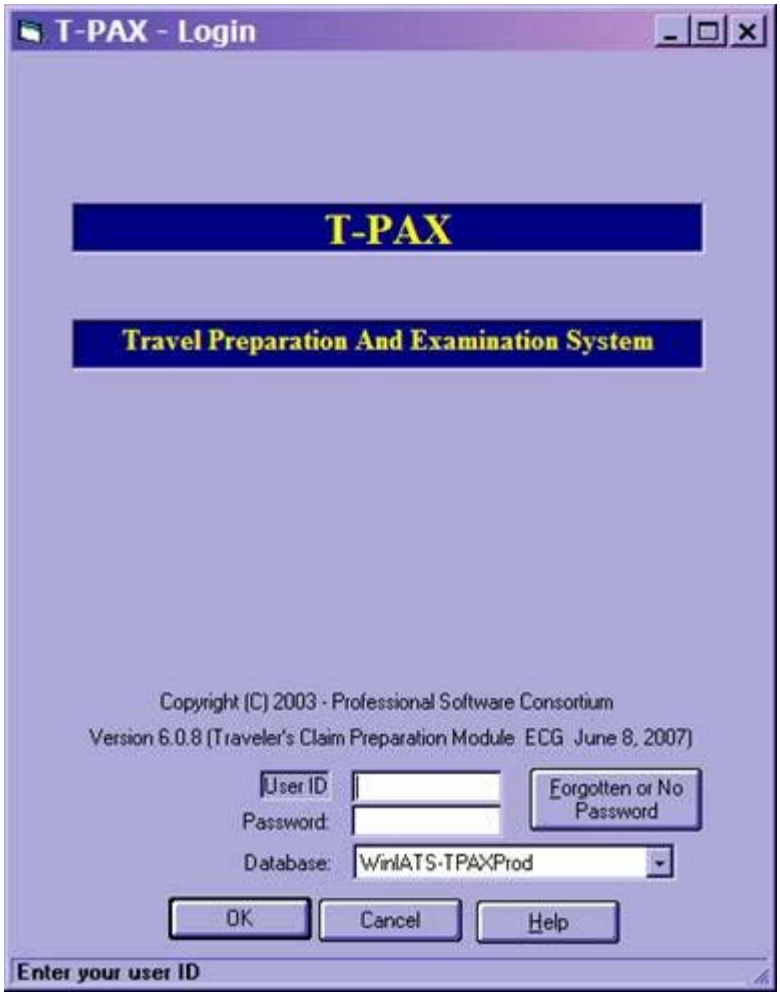
If this is the first time you have accessed the *Citrix Metaframe,* you may get this notice.

A screen may come up asking you what permissions you want
a. Click "Full" permissions
b. Click "Never ask again for any application"



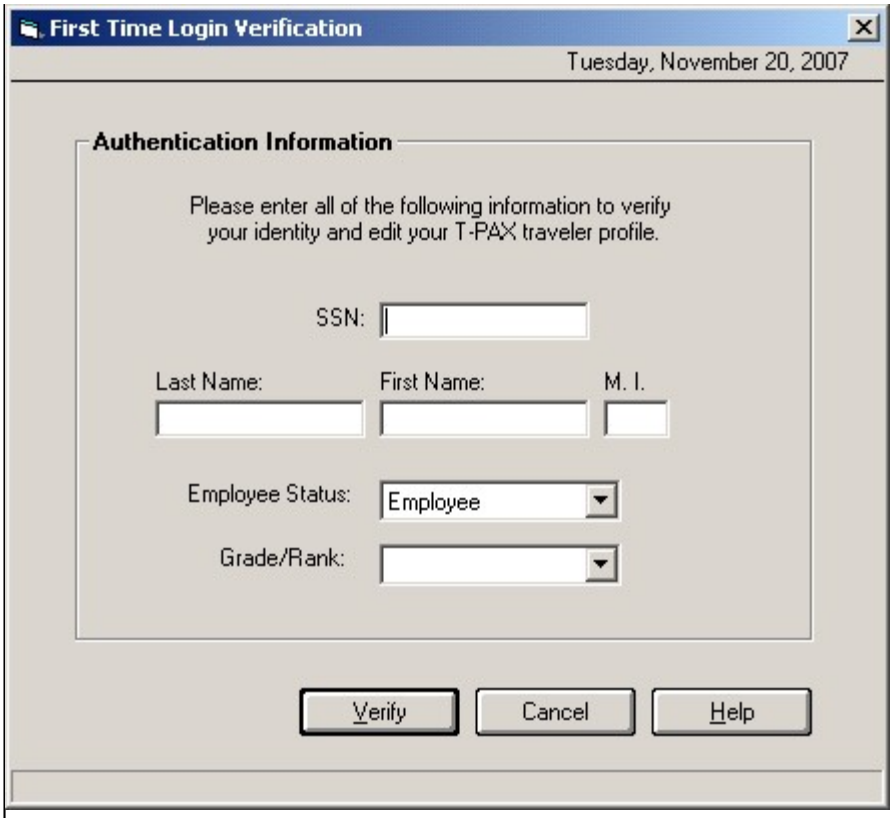
Note: You may also access the Login page for TPAX from the this online help file (http://www.uscg.mil/hq/psc/t-pax/webhelp/) click on the Use T-PAX topic in the table of contents.

You will get the below screen



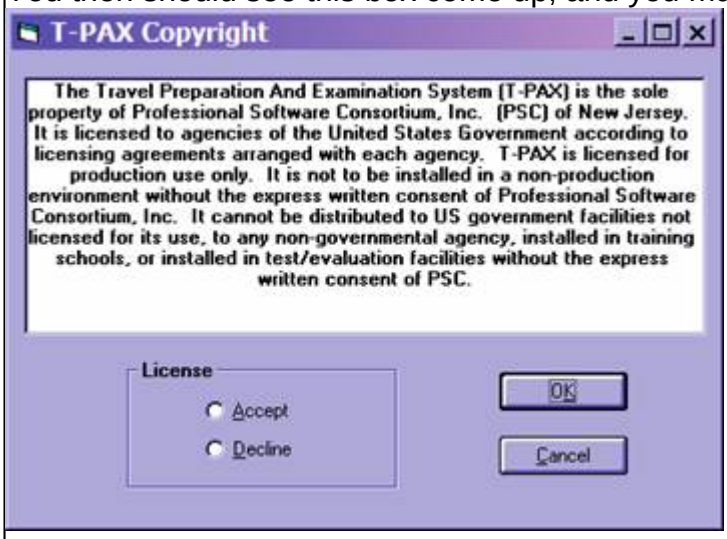
Follow these steps to establish your TPAX user profile:

Step	Action
1	Enter your Employee ID number into the **User ID** field.
2	Click the "Forgotten or No Password"button. 1. Complete the Authentication Information.

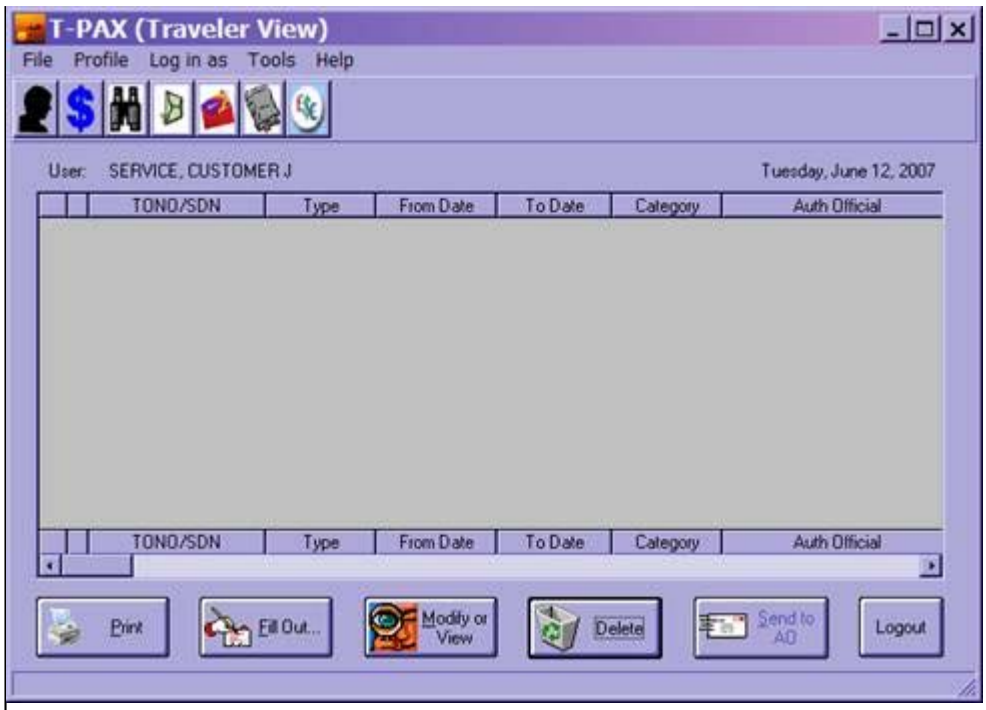


2. Click the **Verify** button

3 You then should see this box come up, and you must select **Accept**, and click **Ok**.



4 You should be brought to a screen that has your Traveler view showing.



5 Click on the black silhouette profile icon:

Or the “Profile” drop down list, and select “Modify Or View”.

6 Complete the Personal profile:

- Enter your Salutation (Mr. Mrs, LT. ect.)
- Ensure your organization is completed,
- Verify your service.

7 Click the **Address/Contact** tab OR click the next button at the bottom left corner to go to the

next page.

Address/Contact

Address/Contact page:

- Please ensure that you enter your home, and work mailing address.
- Enter your work e-mail address in the proper spot, and **check the primary address box**. This will ensure that you receive the notification from your AO when your claim has been approved. You will receive an e-mail from the system when your claim is completed by PSC. This is also the e-mail address that will be used, by the system, for forgotten password resets.
- You can choose to enter two e-mail addresses and check both for delivery, and you will get the notification at both locations.

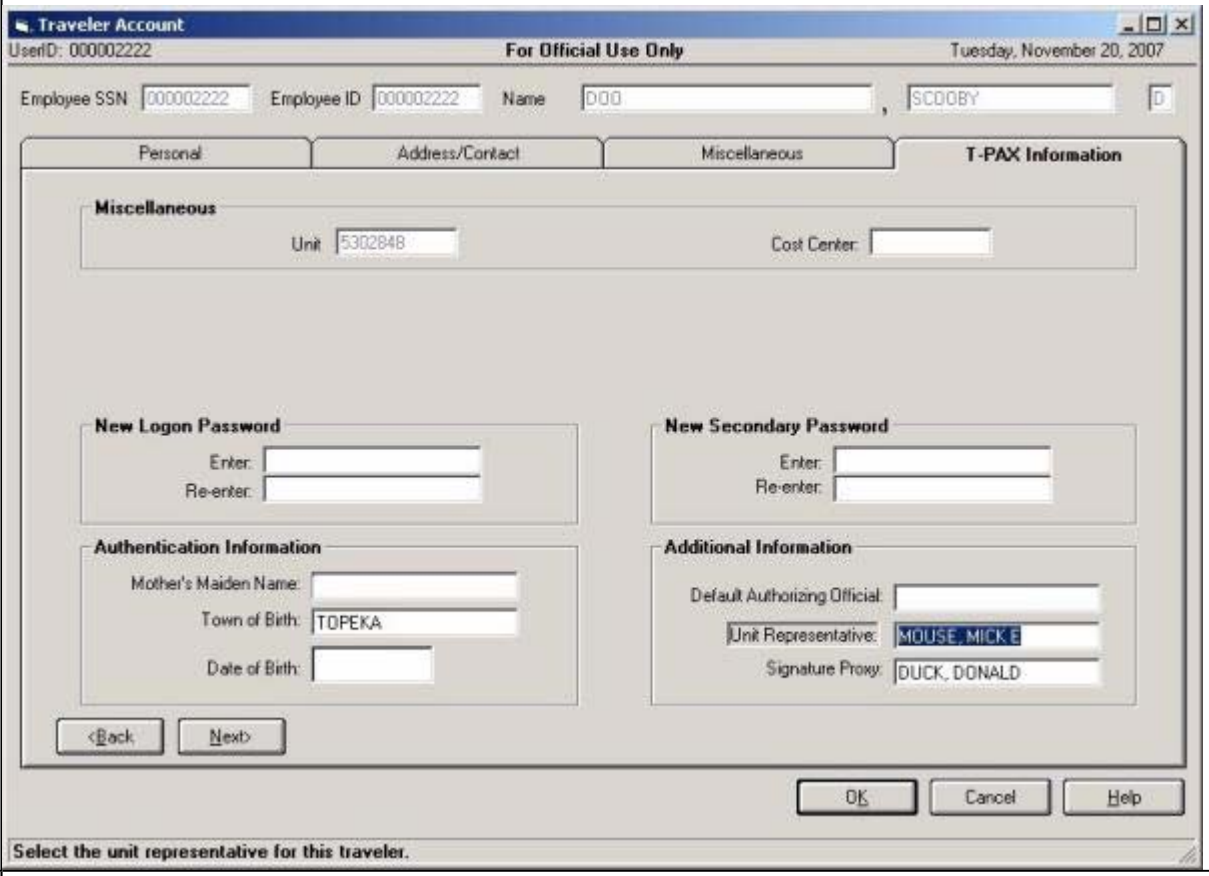
8 Click the **TPAX Information** tab OR CLICK the next button at the bottom left corner to go to the next page.

T-PAX Information

TPAX Information page:

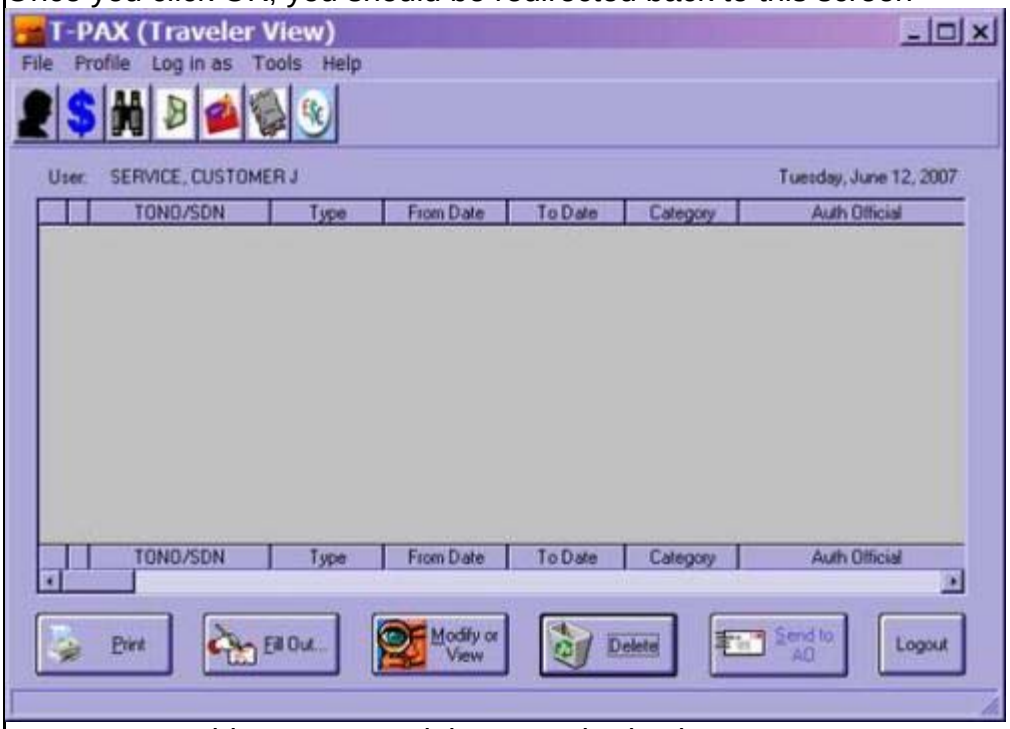
- Enter a new logon password; it must be **nine characters**, with one capital letter, one lower case letter and one number (example: Zrp4x83yq). You may not use special characters.
- Repeat this same password in the re-enter block.
- Enter a secondary password, and re-enter it again.
- You may choose to have the same password for both your logon password, and your secondary password.
- Under Authentication Information, you will need to enter your mother's maiden name,
- **Your town of birth** (you may use spaces in the city), and
- **Your date of birth** (in MM/DD/YYYY format).
- If you know who will be approving most of your claims, you may select a default **Authorizing Official** at this time
- You may designate a **Unit Representative.** This will allow the selected individual to view the traveler/AO box/claims and certain profile information to assist with any

problems the traveler/AO may have having.



9 Click the **OK** button in the bottom right corner to save all of your profile information.

10 Once you click OK, you should be redirected back to this screen



You are now able to enter a claim, or authorization.

	Please remember to keep the information in this profile up to date, and ensure that anytime your e-mail address changes, you must update it to continue to get your notifications from the system.
11	Congratulations on completing the TPAX Initial Log On. Refer to http://www.uscg.mil/hq/psc/travel/t-pax/webhelp/ for instructions on creating authorizations and claims.
12	Click the ***Logout*** button to exit the system. **End of Procedure.**

Printer friendly version of these instructions.

Questions, problems, need more information or have a comment?
Submit an Online Trouble-Ticket/Info Request or call
(866) 772-8724 (toll free) or (785) 339-2200 -- 0700-1600 M-F (central time) and select weekends as posted on http://www.uscg.mil/hq/psc/ccb/
(Note: Password resets are not provided via telephone. Use the Online Trouble-Ticket for password problems)

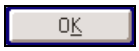
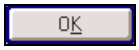
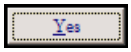
Completing a New Set of Orders

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Press **[Tab]**.
3.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
4.	Click the **OK** button. OK
5.	Click the **Accept** object.
6.	Click the **OK** button. OK
7.	Click the **Fill Out** button. Fill Out...
8.	Click the **Request for Travel Authorization** menu. Request for Travel Authorization
9.	Enter the desired information into the **Order Number** field. Enter a valid value, e.g. "**1105235PBR123000**".
10.	Press **[Tab]**.
11.	**Type of Order** is next; however, these orders are Normal. You can **tab** through the six fields on the left side of the screen, or click the field you want. These orders were **Issued** the same date as they were entered. Click in the **Begin Date** field. 6/21/2005
12.	Enter the desired information into the **Begin Date** field. Enter a valid value, e.g. "**6/22/05**".
13.	Press **[Tab]**.
14.	Enter the desired information into the **Number of Days** field. Example "**3**".
15.	Press **[Tab]**.
16.	Click the **Whats Authorized (TDY)** tab.
17.	Click the **POV Authorized** option. POV Authorized

18.	Click the **POV More Advantageous** option. POV More Advantageous
19.	Click the **OK** button. OK
20.	Click the **Expected Itinerary** tab. Expected Itinerary
21.	Press **[Tab]**.
22.	Press **[Tab]**.
23.	Enter the desired information into the **State/Country** field. Enter a valid value, e.g. "**KS**".
24.	Press **[Tab]**.
25.	Enter the desired information into the **City** field. Enter a valid value, e.g. "**TOPEKA**".
26.	Press **[Tab]**.
27.	Click the **OK** button. OK
28.	Press **[Tab]**.
29.	Press **[Tab]**.
30.	Press **[Tab]**.
31.	Enter the desired information into the **State/Country** field. Example "**MO**".
32.	Press **[Tab]**.
33.	Enter the desired information into the **City** field. Enter a valid value, e.g. "**KANSAS CITY**".
34.	Press **[Tab]**.
35.	Click the **OK** button. OK
36.	Press **[Tab]**.
37.	Press **[Tab]**.
38.	Press **[Tab]**.
39.	Press **[Tab]**.
40.	Press **[Tab]**.

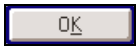
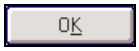
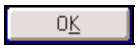
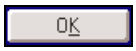
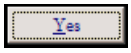
41.	**Note:** Occassionally, UTS(T-Pax) will pre-fill this field with the maximum *daily* per diem rate based on the per diem tables. If your lodging rate is lower, you are able to change the amount. Press **[Tab]**.
42.	This is the daily rate for room taxes based on location and room rate. Enter the desired information into the **Taxes** field. Enter a valid value, e.g. "**12.50**".
43.	Press **[Tab]**.
44.	UTS(T-Pax) accesses the DTOD website and calculates numerous factors, including major construction, rush hour, direction of travel, etc., and determines the best route. 72 miles is a detour route based on these factors. UTS(T-Pax then pre-fills this field. Press **[Tab]**.
45.	Enter the desired information into the **Date** field. Enter a valid value, e.g. "**6/24/05**".
46.	Press **[Tab]**.
47.	Press **[Tab]**.
48.	Press **[Tab]**.
49.	Press **[Tab]**.
50.	Press **[Tab]**.
51.	Enter the desired information into the **Date** field. Enter a valid value, e.g. "**6/24/05**".
52.	Enter the desired information into the **State/Country** field. Example "**KS KANSAS**".
53.	Enter the desired information into the **City** field. Enter a valid value, e.g. "**TOPEKA**".
54.	Press **[Tab]**.
55.	Press **[Tab]**.
56.	Click the **OK** button.
57.	Enter the desired information into the **Reason** field. Enter a valid value, e.g. "**MC**".
58.	Press **[Tab]**.
59.	Note the mileage difference. The DTOD website calculates numerous factors, including major construction, rush hour, etc., and determines the best route. 72 miles is a detour route based on these factors, including the direction of travel. 64 miles is the most 'direct' route, and for the return trip is best. Click the **Reimbursables** tab.

	Reimbursables
60.	Enter the desired information into the **Nature of Expense** field. Enter a valid value, e.g. "**tolls**".
61.	Press **[Tab]**.
62.	Enter the desired information into the **Amount** field. Enter a valid value, e.g. "**4.50**".
63.	Press **[Tab]**.
64.	Click the **OK** button. OK
65.	Click the **Calculations** tab. Calculations
66.	Click the **Financial** tab. Financial
67.	Click the **Modify Accounting** button. Modify Accounting
68.	Click the **TONO** field. 1105235PBR123000
69.	Press **[Tab]**.
70.	Enter the desired information into the **R/D** field. Example "**P**".
71.	Press **[Tab]**.
72.	Enter the desired information into the **Appr** field. Enter a valid value, e.g. "**01**".
73.	Press **[Tab]**.
74.	Enter the desired information into the **Limit** field. Enter a valid value, e.g. "**199**".
75.	Press **[Tab]**.
76.	Enter the desired information into the **Allt** field. Enter a valid value, e.g. "**56**".
77.	Press **[Tab]**.
78.	Enter the desired information into the **ProgEle** field. Enter a valid value, e.g. "**BF**".
79.	Press **[Tab]**.

80.	Enter the desired information into the **CstAct** field. Enter a valid value, e.g. "**70870**".
81.	Press **[Tab]**.
82.	Enter the desired information into the field. Enter a valid value, e.g. "**2100**".
83.	Press **[Tab]**.
84.	Click the **OK** button. 
85.	Click the **Remarks** tab.
86.	Any remarks added in this field will appear on the orders. Press **[Tab]**.
87.	Click the **OK** button.
88.	Click the **Send to AO** button.
89.	Since Mr. Duck has been designated as the 'default' AO, he automatically fills this field. Click the **OK** button. 
90.	Enter the desired information into the field. Enter a valid value, e.g. "**1234ABCD**".
91.	Click the **OK** button.
92.	Click the **Logout** button.
93.	Click the **Yes** button. 
94.	Congratulations for completing the Enter New Orders tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

Requesting a Travel Advance

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Press **[Tab]**.
3.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**ABCD1234**".
4.	Click the **OK** button. OK
5.	Click the **Accept** option. Accept
6.	Click the **OK** button. OK
7.	Click the **Fill Out** button. Fill Out...
8.	Click the **Request for Advance** menu. Request for Advance
9.	Select the desired set of orders from the **Order Number** list.
10.	Click the **OK** button. OK
11.	Click the **Calculations** tab. Calculations
12.	Click in the **Advance Authorized** field. $0.00
13.	The note the bottom of the screen provides the **maximum advance authorized.** Enter the desired information into the **Advance Authorized** field. Enter a valid value, e.g. "**173.00**".
14.	Click the **Financial** tab. Financial
15.	The **Method of Payment** does not need to be changed as the system will default to EFT. Click the **Modify Accounting** button. Modify Accounting
16.	Click the **Horizontal scrollbar** scrollbar.

17.	Verify the dollar amount. Click the **OK** button. 
18.	Click the **OK** button. 
19.	Click an entry in the list. Click on the **Advance** request.
20.	Click the **Send to AO** button.
21.	Click the **OK** button. 
22.	Enter the desired information into the **Enter Password** field. Enter a valid value, e.g. "**1234ABCD**".
23.	Click the **OK** button. 
24.	Click the **Logout** button.
25.	Click the **Yes** button. 
26.	Congratulations for completing the Request for Advance tutorial. Click the icons below to view in depth plicies and procedures. **End of Procedure.**

Completing a New Travel Claim

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
3.	Click the **OK** button. OK
4.	Click the **Accept** option. Accept
5.	Click the **OK** button. OK
6.	Click the **Fill Out** button. Fill Out...
7.	Click the **Request for Settlement** menu. Request for Settlement
8.	Click the desired **TONO.**
9.	Click the **OK** button. OK
10.	Click the **Adv/Accrl** tab. Adv/Accrl
11.	Click the **Entitlements** tab. Entitlements
12.	Click the **View/Modify** button. View/Modify
13.	Click the **Actual Itinerary** tab. Actual Itinerary
14.	Click in the **Lodging** field. $88.00
15.	Enter the desired information into the **Lodging** field. Enter a valid value, e.g. "**76.00**".
16.	Press **[Tab]**.
17.	Enter the desired information into the **Taxes** field. Enter a valid value, e.g. "**11.43**".
18.	Press **[Tab]**.

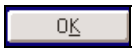
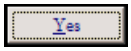
19.	Click the **Reimbursables** tab. Reimbursables
20.	Press **[Tab]**.
21.	Press **[Tab]**.
22.	Press **[Tab]**.
23.	Enter the desired information into the **Amount Claimed** field. Enter a valid value, e.g. "**3.50**".
24.	Press **[Tab]**.
25.	Press **[Tab]**.
26.	Click the **OK** button. OK
27.	Click the **Yes** button. Yes
28.	Click in the **Lodg.Taxes** field. $12.50
29.	Enter the desired information into the **Lodg. Taxes** field. Example "**11.43**".
30.	To change the next Lodging Tax amount, click in the next **Lodg.Taxes** field. $12.50
31.	Enter the desired information into the **Lodg.Taxes** field. Enter a valid value, e.g. "**11.43**".
32.	Click the **OK** button. OK
33.	Click the **OK** button. OK
34.	Click the **Calculations** tab. Calculations
35.	Click the **Financial** tab. Financial
36.	Click the **Modify Accounting** button. Modify Accounting
37.	Click the **Horizontal scrollbar** scrollbar.
38.	Verify the **Amount** has changed. Click the **OK** button.

	OK
39.	Click the **Remarks** tab. Remarks
40.	All information typed in the **Remarks** block will appear on both the printed orders and the travel claim. Click the **OK** button. OK
41.	Click the **Send to AO** button. Send to AO
42.	Since Mr. Duck has already been set as the Default AO, his name automatically appears. Click the **OK** button. OK
43.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".
44.	Click the **OK** button. OK
45.	Click the **Logout** button. Logout
46.	Click the **Yes** button. Yes
47.	Congratulations for completing the Completing a New Travel Claim tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

Completing a Supplemental Travel Claim

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
3.	Click the **OK** button. OK
4.	Click the **Accept** option.
5.	Click the **OK** button. OK
6.	Click the **Fill Out** button. Fill Out...
7.	Click the **Request for Settlement** menu. Request for Settlement
8.	Click on the **Order Number** desired. Select Order Number **1105235PBR123000**.
9.	Click the **OK** button. OK
10.	Click the **Entitlements** tab. Entitlements
11.	Click the **View/Modify** button. View/Modify
12.	Click the **Reimbursables** tab. Reimbursables
13.	Click in the *second* **Date** field.
14.	Press **[Tab]**.
15.	Enter the desired information into the **Nature of Expense** field. Enter a valid value, e.g. "**PARKING**".
16.	Press **[Tab]**.
17.	Press **[Tab]**.
18.	Enter the desired information into the **Amount Claimed** field. Enter a valid value, e.g. "**20.00**".

19.	Press **[Tab]**.
20.	Press **[Tab]**.
21.	Click the **OK** button. OK
22.	Since Meals and Lodging were not effected, they do not have to be recalculated. Click the **No** button. No
23.	Click the **Calculations** tab. Calculations
24.	Verify the amount **Due Member.** Click the **Financial** tab. Financial
25.	Click the **Modify Accounting** button. Modify Accounting
26.	Click the **Horizontal scrollbar** scrollbar.
27.	Verify the **Amount** due. Click the **OK** button. OK
28.	Click the **Remarks** tab. Remarks
29.	Click in the **Remarks** field.
30.	Enter the desired information into the **Remarks** field. Enter a valid value, e.g. "**Please pay additional expense for parking.**".
31.	Click the **OK** button. OK
32.	Click the desired Settlement from the list. Select **TONO/SDN 1105235PBR123000**
33.	Click the **Send to AO** button. Send to AO
34.	Since Mr. Duck is the default AO, his name automatically appears. Click the **OK** button. OK
35.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".

36.	Click the **OK** button. 
37.	Click the **Logout** button.
38.	Click the **Yes** button. 
39.	Congratulations for completing the Completing a Supplemental Travel Claim tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

Print TVS

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Press **[Tab]**.
3.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
4.	Click the **OK** button. OK
5.	Click the **Accept** option. Accept
6.	Click the **ok** button. OK
7.	Click the **Horizontal scrollbar** scrollbar.
8.	To print a **Travel Voucher Summary (TVS)**, the claim status must be "**Completed**". Select the claim for **$25.00 (est).**
9.	Click the **Print** button. Print
10.	Click the **Print Travel Voucher** menu. Print Travel Voucher
11.	Click the **Print** button. Print
12.	Click the **Logout** button. Logout
13.	Click the **Yes** button. Yes
14.	Congratulations for completing the Print TVS tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

Retrieve Orders/Claim

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
3.	Click the **OK** button. OK
4.	Click the **Accept** option. Accept
5.	Click the **OK** button. OK
6.	Click the Request for Settlement on TONO **1105235PBR123000** in an **Awaiting AO approval** status. Note: Only the word "**Awaiting**" is visible on this screen.
7.	Click the **File** menu. File
8.	Click the **Retrieve Request** menu. Retrieve Request
9.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".
10.	Click the **OK** button. OK
11.	Click the Request for Settlement on TONO **1105235PBR123000** in an **Entered** status.
12.	Click the **Modify or View** button. Modify or View
13.	Click the **Entitlements** tab. Entitlements
14.	Click the **View/Modify** button. View/Modify
15.	Click the **Reimbursables** tab. Reimbursables
16.	Click in the first open **Date** field.
17.	Press **[Tab]**.
18.	Enter the desired information into the **Nature of Expense** field.

	Enter a valid value, e.g. "**Telephone Calls Long Distance**".
19.	Press **[Tab]**.
20.	Press **[Tab]**.
21.	Enter the desired information into the **Amount Claimed** field. Enter a valid value, e.g. "**5.00**".
22.	Press **[Tab]**.
23.	Press **[Tab]**.
24.	Click the **OK** button. OK
25.	Since the daily meals and lodging information has not changed, there is no need to recalculate. Click the **No** button. No
26.	Click the **Calculations** tab. Calculations
27.	Verify **Amount Due Member** has updated. Click the **Financial** tab. Financial
28.	Click the **Modify Accounting** button. Modify Accounting
29.	Click the **Horizontal scrollbar** button of the right side of the scrollbar.
30.	Verify the **Amount** has updated. Click the **OK** button. OK
31.	Click the **Remarks** tab. Remarks
32.	Enter the desired information into the **Remarks** field. Enter a valid value, e.g. "**and phone calls.**".
33.	Click the **OK** button. OK
34.	Click the **Send to AO** button. Send to AO
35.	Since Mr. Duck is the designated AO, his name automatically appears. Click the **OK** button.

	OK
36.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".
37.	Click the **OK** button. OK
38.	Click the **Logout** button. Logout
39.	Click the **Yes** button. Yes
40.	Congratulations for completing the Retreive Orders/Claim tutorial. Click on the icons below to view in depth policies and procedures. **End of Procedure.**