

U.S. Coast Guard



User Guide – Member Self Service for Travel Charge Card

36555 –Travel Charge Card Tracking, Technology Refresh Sub-Project

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Table of Contents

How to View Your Credit Card Data via Self Service.....	3
How to View Your Credit Card Balance via Self Service.....	5

How to View Your Credit Card Data via Self Service

Purpose This functionality gives users that currently have a Travel Charge Card the capability to view their credit card information. This information is *VIEW ONLY* and cannot be edited.

Step	Action
1	<p>To view your Travel Charge Card account information, click on the # More... link, which is the last link in the “View” column inside the Employee box:</p> <div data-bbox="613 575 1187 1228" data-label="Image"> <p>The screenshot shows a window titled "Employee" with a list of links. The links are organized into three columns: Profile, Tasks, and View. The "View" column contains the following links: View Paycheck, Test Results, View Reserve Points, Personal Information, Member Information, Member Info Additional, View My Worklist, My CGHRMS Orders, Employee Review Summary, and 9 More... (highlighted with a red box).</p> </div>
2	<p>Click on the My Credit Card Data link.</p> <div data-bbox="277 1356 1523 1850" data-label="Image"> <p>The screenshot shows a window titled "View" with a list of links organized into three columns. The middle column contains the following links: Test Results, Member Information, My CGHRMS Orders, Member Training Rating, SWE Profile Letter, and My Credit Card Data (highlighted with a red box). The right column contains: View Reserve Points, Member Info Additional, Employee Review Summary, Warrant PDE, My Honors and Awards, and My Credit Card Balance.</p> </div>

Step	Action																																																				
3	<p>Your Credit Card Data will display.</p> <div data-bbox="277 306 1523 768" style="border: 1px solid black; padding: 5px;"> <p>Maintain Employee Credit Card Data</p> <p>John Smith Person ID: 1234567</p> <p>Credit Card Data Find View All First 1 of 1 Last</p> <table border="0" style="width: 100%;"> <tr> <td>Business Unit:</td> <td>00010</td> <td></td> <td></td> </tr> <tr> <td>Credit Card Vendor:</td> <td>COMON</td> <td>JPMC</td> <td></td> </tr> <tr> <td>Card Type:</td> <td>Visa</td> <td></td> <td></td> </tr> <tr> <td>Credit Card Number:</td> <td>XXXXXXXXXXXX8577</td> <td>Function:</td> <td>Individually Billed Account</td> </tr> <tr> <td>Issued Date:</td> <td>10/08/2008</td> <td>Expiration Date:</td> <td>11/30/2011</td> </tr> <tr> <td>Limit Amount:</td> <td></td> <td>Currency:</td> <td>USD</td> </tr> <tr> <td>Limit Per Trans:</td> <td>10000.00</td> <td>Bill To:</td> <td>Employee</td> </tr> </table> </div> <p>Refer to the table below for descriptions of the data fields.</p> <table border="1" data-bbox="277 877 1523 1457"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Business Unit</td> <td>'00010' for Active Coast Guard Units</td> </tr> <tr> <td>Credit Card Vendor</td> <td>Name of Credit Card Company</td> </tr> <tr> <td>Card Type</td> <td>Type of credit card - MasterCard, Visa, Amex, etc.</td> </tr> <tr> <td>Credit Card Number</td> <td>Last four digits of the credit card number</td> </tr> <tr> <td>Issued Date</td> <td>Issued Date. The date the card was issued. MM/DD/YYYY format</td> </tr> <tr> <td>Limit Amount</td> <td>Current credit limit amount. Note: '0' is used to show no limit or a closed account. '1' is used when the account hasn't been activated.</td> </tr> <tr> <td>Limit Per Trans</td> <td>N/A</td> </tr> <tr> <td>Function</td> <td>Shows how the account is billed.</td> </tr> <tr> <td>Expiration Date</td> <td>The date the card expires. MM/DD/YYYY format</td> </tr> <tr> <td>Currency</td> <td>The currency type (USD = U.S. Dollars)</td> </tr> <tr> <td>Bill To</td> <td>Who the account is billed to.</td> </tr> </tbody> </table>	Business Unit:	00010			Credit Card Vendor:	COMON	JPMC		Card Type:	Visa			Credit Card Number:	XXXXXXXXXXXX8577	Function:	Individually Billed Account	Issued Date:	10/08/2008	Expiration Date:	11/30/2011	Limit Amount:		Currency:	USD	Limit Per Trans:	10000.00	Bill To:	Employee	Field	Description	Business Unit	'00010' for Active Coast Guard Units	Credit Card Vendor	Name of Credit Card Company	Card Type	Type of credit card - MasterCard, Visa, Amex, etc.	Credit Card Number	Last four digits of the credit card number	Issued Date	Issued Date. The date the card was issued. MM/DD/YYYY format	Limit Amount	Current credit limit amount. Note: '0' is used to show no limit or a closed account. '1' is used when the account hasn't been activated.	Limit Per Trans	N/A	Function	Shows how the account is billed.	Expiration Date	The date the card expires. MM/DD/YYYY format	Currency	The currency type (USD = U.S. Dollars)	Bill To	Who the account is billed to.
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How to View Your Credit Card Balance via Self Service

Purpose This functionality gives users that currently have a Travel Charge Card the capability to view their credit card balance. This information is *VIEW ONLY* and cannot be edited.

Step	Action
1	<p>To view your Travel Charge Card balance, click on the # More... link, which is the last link in the “View” column inside the Employee box:</p> <div data-bbox="613 575 1187 1226" data-label="Image"> <p>The screenshot shows an 'Employee' menu with the following links:</p> <ul style="list-style-type: none"> Profile <ul style="list-style-type: none"> Workflow User Preferences Tasks <ul style="list-style-type: none"> Languages Memberships Emergency Contacts Home and Mailing Address Phone Numbers Allotments Direct Deposit W-4 Tax Information State Tax Information 8 More... View <ul style="list-style-type: none"> View Paycheck Test Results View Reserve Points Personal Information Member Information Member Info Additional View My Worklist My CGHRMS Orders Employee Review Summary 9 More... </div>
2	<p>Click on the My Credit Card Balance link.</p> <div data-bbox="277 1356 1523 1850" data-label="Image"> <p>The screenshot shows a 'View' menu with the following links:</p> <ul style="list-style-type: none"> View Paycheck Test Results View Reserve Points Personal Information Member Information Member Info Additional View My Worklist My CGHRMS Orders Employee Review Summary Off Comparison Scale Summary Member Training Rating Warrant PDE SWE PDE SWE Profile Letter My Honors and Awards My W2 Data My Credit Card Data My Credit Card Balance </div>

Step	Action
3	Your Credit Card balance(s) will display. Click on the heading labeled “Expense Code” to sort the balance information in expense code order.

Business Expenses

Sandra Summers EMP ID: 1234567 Empl Rcd #: 0

Employee Business Expense Time Find | View All First 1 of 1 Last

Expense Period End Date: 09/09/2010

Business Expense Details Customize | Find | View All | First 1-6 of 6 Last

Charge Date	Expense Code	Expense Amount	Currency Code	Business Purpose
09/09/2010	120+ Days PD		USD	Open
09/09/2010	90 Days PD		USD	Open
09/09/2010	60 Days PD		USD	Open
09/09/2010	30 Days PD	116.76	USD	Open
09/09/2010	Amount Due	122.64	USD	Open
09/09/2010	Hierarchy		USD	31183

Refer to the table below for descriptions of the data fields.

Field	Description
Expense Period End Date	Date of the report. The data is updated monthly.
Business Expense Details	
Expense Tab	
Charge Date	Date of the report
Expense Code and Expense Amount	<p>A description of the entry for the associated Expense Amount.</p> <p># Days PD: # is the number of days and PD is <u>P</u>ast <u>D</u>ue Any expense amount associated with a # Days PD is the previous amount past due and unpaid for the # of Days.</p> <p>Amount Due refers to the total current amount due.</p> <p>Hierarchy is the credit card vendor’s Reporting Hierarchy Code. There is no associated expense amount for the Hierarchy. The hierarchy code is displayed under Business Purpose.</p>
Currency Code	The type of currency (USD = U.S. Dollars)
Business Purpose	<p>The account status.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Open- Account in favorable standing Suspended- Account is more than 60 days past due Closed- Account is closed and the bank or card vendors cannot accept anymore charges for the account <p>The 5-digit number located on the “Hierarchy” line is the credit card vendor’s Reporting Hierarchy Code.</p>

Step	Action
	<i>Note:</i> Address changes to your U.S. Coast Guard personnel and pay account are not transmitted to JPMC. You must notify the bank separately to update your address.
4	To return to the Homepage, click on the Home link located in the upper right-hand corner of the page.