Chapter Overview

Introduction

The objective of this chapter is to provide concise, user friendly job aids for entering and updating general personnel data, such as information on dependency, insurance, identification cards, and other miscellaneous items not covered in other sections of this manual.

In this chapter

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Section Overview

Introduction

This section will guide you through the process of electing, increasing, reducing, declining, or canceling SGLI coverage and reporting casualties.

In this section

5.A.1 Designation of Beneficiaries and Record of Emergency Data

5.A.1.1 Introduction

To designate beneficiaries, complete a Designation of Beneficiaries and Record of Emergency Data, form CG-2020D, from http://www.uscg.mil/ppc/forms/ and submit to the SPO. The CG-2020D is not used to designate Servicemembers' Group Life Insurance (SGLI) beneficiaries. Changes to a member's Emergency Contact Information should be made by the member in Direct Access.

5.A.1.2 Reference

(a) Military Casualties and Decedent Affairs, COMDTINST M1770.9 (series)
(b) U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap 3-D and 10-J
(c) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3, Part III, General Transactions, Chap 4, Dependency, Decedent Affairs, SGLI, and Contact Information

5.A.1.3 Purpose

Per reference (a), the Designation of Beneficiaries and Record of Emergency Data form and the computer generated Emergency Contact Report are official documents required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
- Name of person(s) receiving death gratuities
- Person(s) who receive allotment of pay if missing or unable to transmit funds
- Person(s) who receive unpaid pay and allowances
- Person(s) to notify in case of emergency or death
- Person(s) who receive unpaid pay and allowances
- Person Authorized to Direct Disposition of Remains (PADD)
- Person Eligible to Receive Effects (PERE)

5.A.1.4 Annual Verification

Per Article 2.A.2.d(4)(d), annually, beginning in October and not later than 30 November, members must verify the Direct Access BAH/Dependency Data report, Designation of Beneficiaries and Record of Emergency Data form (CG-2020D) and Direct Access Emergency Contact report. Refer to Section 5-C of this manual for procedures on the annual verification.

Continued on next page

5.A.1 Designation of Beneficiaries and Emergency Contacts,
Continued

5.A.1.5 When to submit the CG-2020D

The Designation of Beneficiaries and Record of Emergency Data (CG-2020D) will be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Changes to the form occurring in any item

5.A.1.6 When to submit or update the Emergency Contact Information

The Emergency Contact Information will be submitted and/or updated by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Changes to the information occurring in any item

5.A.1.7 Death Gratuity

The death gratuity is paid to the survivor or survivors of a Coast Guard regular or reserve member serving with or without pay, who dies while on active duty, or while traveling to or from AD/ADT/IDT, or while on AD/ADT/IDT, per 10 U.S.C. § 1475 - § 1480. Survivors are also authorized death gratuity when members die within 120 days following their separation date or most recent reserve service, if the Department of Veterans Affairs (VA) determines the death was service-connected.

Each member has a personal option to designate persons to receive part, or all, of the death gratuity. Only living persons may be designated. Formal or blood relationship is not required. A maximum of ten living persons may be designated to receive portions. Portions may be specified only in 10 percent increments. If portions add up to less than 100 percent, then the remainder will be paid by law.

Continued on next page

5.A.1 Designation of Beneficiaries and Record of Emergency Data, Continued

5.A.1.8 Beneficiary(ies) for Death Gratuity

If a member does not wish to designate a beneficiary for death gratuity, they enter "None." in Section 3 – Beneficiary for Death Gratuity Pay, of form CG-2020D. Undesignated portions will be paid by law according to the default precedence list. The designation of any person to receive a portion of the death gratuity must indicate the percentage of the amount, to be specified only in 10 percent increments, that the person may receive. The full amount of death gratuity is payable to someone, even if the member enters "None" or chooses some percentages that add up to less than 100%. If the member chooses to designate less than the full amount, or enters "None," or leaves the block blank or if the form is destroyed then the balance will be paid in the default precedence of payment, as follows:

1. To the surviving spouse of the member, if any (does not include an ex-spouse);
2. To any surviving "children" of the person and the descendants of any deceased children by representation;
3. To the surviving "parents" or the survivor of them;
4. To the duly-appointed executor or administrator of the estate of the person;
5. If none of the above, then to other next-of-kin of the person under the laws of domicile of the person at the time of the person's death.

5.A.1.9 Action when a married member designates Beneficiary(ies) for Death Gratuity

If a member has a spouse but designates a person other than the spouse to receive all or a portion of the death gratuity pay, the member's Commanding Officer is required to notify the spouse about the designation.

The notice to spouse must be written. First class mail will normally be used. A copy of the notice must be filed in part 4 of the PDR. No response from the spouse is required.

See Exhibit 5.A.1.1, on the following page, for a spousal notification letter template.

Continued on next page

Exhibit 5.A.1.1, Death Gratuity Designation Spousal Notification Letter

(Font size reduced & spacing condensed to fit this page)

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

CO, OINC, Commander
U. S. Coast Guard
Name of unit

Street
City, State & Zip
Staff Symbol:
Phone:
Fax:
Email:

Spouse's name
Address line 1
Address line 2
City, State, Zip

1772
Date

NOTIFICATION OF BENEFICIARY DESIGNATION:

Your spouse recently made changes to the beneficiary designation for Death Gratuity pay. The change may affect you. In accordance with Public Law 110-181 we are required to notify a servicemember’s spouse whenever that member names any Death Gratuity beneficiaries other than the member's spouse.

The Death Gratuity originally provided for the immediate living expenses of family members. The current amount of the Death Gratuity payment is $100,000. It is an entitlement paid to a beneficiary even if the deceased member was indebted to or overpaid by the Coast Guard.

On July 1, 2008, a new Death Gratuity beneficiary policy became effective (Public Law 110-181, section 645). The new policy allows servicemembers an option to designate up to 100 percent of their death gratuity to any living person of the servicemember's choice. Your servicemember spouse has designated one or more people (other than yourself) to receive all or part of the Death Gratuity payment.

The servicemember is entitled to make the above election. We are not authorized to disclose the name of any other beneficiary.

Note: Undesignated portions will be paid by law:

(1) To the surviving spouse of the member, if any (does not include an ex-spouse);
(2) To any surviving “children” of the person and the descendants of any deceased children by representation;
(3) To the surviving “parents” or the survivor of them;
(4) To the duly-appointed executor or administrator of the estate of the person;
(5) If none of the above, then to other next-of-kin of the person under the laws of domicile of the person at the time of the person's death.

There is no requirement for you to reply to this letter. We are required only to notify you of your spouse’s decision. If you have any questions regarding this letter, please call (212) 555-1212 or write to the address above.

Sincerely,

Name
Rank, USCG/USCGR
Title

Copy: SPO

Exhibit 5.A.1.1

5.A.2 Servicemembers' Group Life Insurance (SGLI)

5.A.2.1 Introduction

Servicemembers' Group Life Insurance was established for the purpose of making life insurance protection available to members of the Uniformed Services at a reasonable cost.

5.A.2.2 Reference

(a) Servicemembers' and Veterans' Group Life Insurance Handbook (http://www.insurance.va.gov/SgliSite/handbook/handbook.htm)
(b) http://www.insurance.va.gov/sgliSite/SGLI/SGLI.htm (SGLI Homepage)
(c) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 Part III, General Transactions, Chap 4, Dependency, Decedent Affairs, SGLI, and Contact Information

5.A.2.3 Automatic coverage

SGLI automatically insures all newly accessed members for $400,000 and then allows them to either:

- Decline SGLI coverage, or
- Elect a reduced level of SGLI coverage, in multiples of $50,000.

5.A.2.4 Traumatic Injury Protection (TSGLI)

Traumatic injury protection under the SGLI program provides payments to service members who are severely injured due to a traumatic event. All members with SGLI coverage are automatically covered by Traumatic SGLI (TSGLI) and will be charged an additional monthly premium of one dollar. Members cannot decline TSGLI coverage unless they also decline all SGLI coverage. TSGLI will provide a payment of $25,000 to $100,000 to members who sustain specific traumatic injuries. Example of covered injuries include, permanent loss of a foot, hand, eyesight, hearing, or speech. The policy also covers severe burns, extensive paralysis or long-term coma.

5.A.2.5 Combat SGLI Allowance

Members serving in certain areas (as designated by SECDEF/SECDHS), will receive an allowance in an amount equal to the amount of the deduction made for the maximum amount of SGLI coverage plus the amount for TSGLI coverage. All members serving in designated areas will have automatically have maximum SGLI coverage.

Continued on next page

5.A.2 Servicemembers' Group Life Insurance (SGLI), Continued

5.A.2.6 Payment of SGLI Premium

Active duty members and reservists eligible to receive drill pay will make SGLI payments through automatic payroll deductions which will be reflected on the member's LES.

Note: Reservists enrolled in SGLI who do not drill temporarily, but remain in a good pay status, will accrue a negative SGLI premium. Upon resumption of a drilling status, the system will deduct the negative premium balance from the member's pay. If the member does not drill for pay within five months and no SGLI payments is made SGLI coverage will be administratively terminated. To avoid cancellation of SGLI Coverage, reservists with a negative balance may pay off that balance with a check or money order or credit card (Visa or Master Card).

For payment by credit card (Visa or Master Card) or call PPC (mas/dc) at (785) 339-3610.

Check or money order payments should:

- Be made payable to "U.S. Coast Guard,"
- Be clearly marked "SGLI PAYMENT,"
- Include member's name and EMPLID

Sent Check/MO Payments to: COMMANDING OFFICER (MAS)
USCG PAY & PERSONNEL CENTER
ATTN: SGLI
444 SE QUINCY STREET
TOPEKA KS 66683-3591

5.A.2.7 Procedures for electing coverage or increased coverage previously declined or decreased

Members' requests for reinstatement or increased SGLI or FSGLI coverage are submitted on forms SGLV-8286 (for SGLI) and SGLV-8286a (for FSGLI). **The health-related questions (**SGLV-8286, Item 4, *About Your Health* or SGLV-8286A, Part III – *Spouse Information***) on the forms are only required to be completed when the member has previously declined coverage or elected coverage for a reduced amount**. In these cases, when the member is applying to reinstate or increase coverage, the health-related questions must be answered. If the answers to all the health-related questions are "No", the unit may accept the form and coverage begins. If the answers to any of the heath-related questions are "Yes", the form must be forwarded to the OSGLI for approval. Approval must be received from the OSGLI, before coverage can begin.

Continued on next page

5.A.2 Servicemembers' Group Life Insurance (SGLI), Continued

If	Then
Member answers "NO" to the Health Related Questions (Item 4 of SGLV-8286 or Part III of SGLV-8286A)	Member meets the "proof of good health" requirement. SGLI is increased or restored effective the date the USCG receives the form. The original and photocopies of the completed form are distributed as follows: Original - SPO Photocopy 1 - CGPSC (PSD-MR) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)
Member answers "YES" to any the Health Related Questions	The original SGLV-8285/SGLV-8286A is filed in the member's personnel file and a copy of the completed form is sent to the OSGLI for review and approval. SGLI may not be increased or restored until approval has been received from OSGLI.
Approval has been obtained by OSGLI on the member	The copy returned from OSGLI is filed with the original SGLV-8286/SGLV-8286A at the SPO. Photocopies of the "Approval" are distributed as follows: Photocopy 1 - CGPSC (adm-3) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)

5.A.2.8 Procedures for reducing or declining coverage

Members may elect to reduce or decline coverage by completing form SGLV-8286, Servicemembers' Group Live Insurance Election and Certificate (SGLV-8286). The procedures for completing the form are described below.

5.A.2.9 Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286)

Members with SGLI coverage must complete the Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286) whenever they make a beneficiary designation or changes to a previous designation. The Service members' and Veterans' Group Life Insurance Handbook (VA Handbook 29-98-1) should be available for the member to read when completing this form. The SGLV-8286 should be available at most admin offices and/or may be downloaded from the web at the following site: http://www.insurance.va.gov/sgliSite/forms/8286.htm

Continued on next page

5.A.2 Servicemembers' Group Life Insurance (SGLI), Continued

5.A.2.10 Instructions for completing the SGLV-8286

Instructions for completing the SGLV-8286 are on page 3 of the form.

5.A.2.11 Spousal Notification

Units must notify the member's spouse, by letter, when the member elects no or reduced coverage or names someone other than the spouse, **or child of the member, as the beneficiary**. See section 3.04 of the VA SGLI Handbook. http://www.insurance.va.gov/SgliSite/handbook/handbookch3.htm#304. An example of the spousal notification letter is on page 5-A-12 (Exhibit 5.A.2.1).

5.A.2.12 Designations of beneficiaries who are minors

See Ref (a), 6.04.
http://www.insurance.va.gov/SgliSite/handbook/handbookch6.htm#604

5.A.2.13 If member does not designate a Beneficiary (ies)

See Ref. (a), 6.06.
http://www.insurance.va.gov/SgliSite/handbook/handbookch6.htm#606

Continued on next page

5.A.2 Servicemembers' Group Life Insurance (SGLI), Continued

5.A.2.14 Changing a beneficiary and accepting the SGLV-8286 from the member.

When a member asks to change a beneficiary, have the member immediately put the new beneficiary's name on an SGLV-8286 and sign and date it, even if the rest of the form is incomplete. Then complete the "For Branch of Service Use Only" section on page two of the form. This legally changes the beneficiary and makes it effective immediately.

The minimum information needed to change a beneficiary and have an effective form is:

- Member's Name
- Beneficiary Name
- Member's Signature and date
- Completion of "For Branch of Service Use Only" section on page two of SGLV-8286 **(**Name of Personnel Clerk, Rank, title or grade, Contact telephone/email, Date, and [unit] Address)

Have the member then get the additional information and complete a new SGLV-8286 when they return. However, never send the member away for more information without first getting a signed and dated partially completed SGLV-8286.

5.A.2.15 Unit representative must complete *For Branch of Service Use Only* section when the SGLV-8286 is received from the member

An authorized representative of the U. S. Coast Guard (i.e., CO, XO, OINC, XPO, Yeoman, etc.) must complete the "For Branch of Service Use Only" section on page two of SGLV-8286 (Name of Personnel Clerk, Rank, title or grade, Contact telephone/email, Date, and [unit] Address) to indicate that he/she received the form from the member (whether in person, by mail or electronically) and should include the date he/she received it. The date the form is received should be accurately recorded as it determines the exact time and date when the insurance becomes effective or is reduced or cancelled and is the basis for establishing or changing payroll deductions.

5.A.2.16 Common errors on the SGLV-8286

Common errors that are made to the SGLV-8286 Form:

- The member does not sign the form.
- The "For Branch of Service Use Only" section on page two is not completed.

Continued on next page

5.A.2 Servicemembers' Group Life Insurance (SGLI), Continued

5.A.2.16 Common errors on the SGLV-8286 (cont'd)

- The form is not filed in the member's SPO PDR and, if applicable, Unit PDR.
- The sum total of either the primary or contingent beneficiaries does not equal 100%.

5.A.2.17 Process and Distribution of SGLV-8286

The following table describes the responsibilities associated with the SGLV-8286 and the distribution of the form:

Stage	Who Does It	What Happens
1	Member	Completes Form SGLV-8286 per instructions on the form
2	Unit	Unit representative completes the "For Branch of Service Use Only" section of the form upon receipt from member (whether in person, by mail or electronically). Photocopies are made of the original form and distributed as follows: Original - SPO Photocopy 1 - CGPSC (PSC-MR) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR **Note:** The distribution printed on the SGLV-8286 itself should be disregarded.
3	SPO	Enters SGLI information in Direct-Access Direct Access path: <u>Home</u> > <u>Compensate Employees</u> > <u>Administer Base Benefits</u> > Life and AD/D **Note**: If SGLI was administratively terminated due to the arrears of premiums, the SPO shall not restart SGLI until delinquent premiums have been paid and Form SGLV-8286 has been completed per section 5.A.2.7 of this section.

Continued on next page

Exhibit 5.A.2.1, Notice to Spouse – SGLI Reduction/ Beneficiary Change

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

Commanding Officer
U. S. Coast Guard
Any Unit

123 Any Street.
Any City, ST 12345-1234
Staff Symbol: (xx)
Phone: 785-555-1234
Fax: 785-555-4321
Email: i.am.sender@uscg.mil

1741
DD Month Year

<SpouseFirstName> <SpouseLastName>
<Address1>
<City>, <ST> <Zip>

NOTICE TO SPOUSE—SERVICEMEMBERS' GROUP LIFE INSURANCE (SGLI)—
COVERAGE REDUCTION OR BENEFICIARY CHANGE

Dear <Mr. or Ms.> <SpouseLastName>: *(Salutation optional. If used, omit subject line, above)*

Your spouse, <MemberFirstName>, recently changed the amount of coverage or beneficiary designations for a life insurance policy. The change may affect you.

By law, a $400,000 life insurance policy automatically starts for everyone who joins the Coast Guard. That policy includes $10,000 life insurance for each of the member's children. If anyone entering the Coast Guard has a spouse, or gets married while in the Coast Guard, a $100,000 life insurance policy automatically is started for the spouse. The insurance is not free so some members opt to reduce coverage to a level below $400,000, or decline the insurance completely. A member may designate anyone as a beneficiary.

Federal law requires the Coast Guard to notify you if your spouse reduces life insurance from the current level, declines life insurance entirely, or names primary beneficiaries other than spouse and children. The requirement is in section 1967 of title 38, U.S. Code. Your spouse has made one of those decisions so we are notifying you.

The law does not require us to reveal any other details. That is between you and your spouse.

The law does not give you an opportunity to review or approve any life insurance changes. Changes in beneficiaries are effective immediately. Changes in level of coverage occur at the beginning of the month after the decision to reduce or decline coverage.

SGLI is low-cost term life insurance. It has no cash value. Most of the cost is actually paid by the large group of members of all Services who currently pay monthly premiums. SGLI coverage of $400,000 costs $26 per month. An additional $1 is charged for traumatic injury protection. If a person chooses to have a lower amount of SGLI it is available in $50,000 increments at a cost of $3.25 per $50,000 increment.

You do not need to reply to this letter. We are merely keeping you informed of changes.

Sincerely,

F. M. LAST
Rank/Rate
U.S. Coast Guard
Commanding Officer *or* By direction

Copy: Member

Exhibit 5.A.2.1

5.A.3 SGLI Family Member Coverage

5.A.3.1 Introduction

The Veterans' Survival Benefits Improvement Act of 2001 extends life insurance coverage to spouses and children of members insured under the Servicemembers' Group Life Insurance (SGLI) program. The section offers background information and procedural guidance for implementing SGLI Family Member Coverage.

5.A.3.2 Reference:

(a) Servicemembers' and Veterans' Group Life Insurance Handbook Chap 10
(b) http://www.insurance.va.gov/sgliSite/SGLI/SGLI.htm (VA SGLI Homepage)

5.A.3.3 Eligibility

The spouses and children of Active duty service members and members of the Ready Reserve of a uniformed service are eligible for SGLI coverage only if their sponsors also have SGLI coverage.

Each dependent child (under age 18), of every sponsor covered by SGLI, is automatically covered by SGLI under family insurance regardless of the child's health. In addition, children between the ages of 18 and 23 who are full-time students, as well as any child who, before the age of 18, has been declared legally incompetent, are covered.

Ready Reserve members, who have had their SGLI coverage terminated due to non-payment, must have their accounts up-to-date before SGLI can be restarted or Family Member SGLI can be started. See 5.A.2.6 of this section for payment procedures and termination policy.

Family coverage is available only in the SGLI program, not in the Veterans' Group Insurance (VGLI) program.

Continued on next page

5.A.3 SGLI Family Member Coverage, Continued

5.A.3.4 Coverage Amounts

See Ref. (a), 10.01
http://www.insurance.va.gov/SgliSite/handbook/handbook.htm

5.A.3.5 Cost of Coverage

See Ref. (a), 10.04
http://www.insurance.va.gov/SgliSite/handbook/handbook.htm

5.A.3.6 Deduction of Premiums

Premiums for spouse coverage will automatically be deducted from the member's pay beginning with the pay period following the date a family election is recorded in Direct Access.

5.A.3.7 Form for Reducing or Declining Coverage

If the member does not want insurance coverage for his/her spouse or wants a reduced amount of coverage, he/she must complete form SGLV-8286A, Family Coverage Election (from http://www.insurance.va.gov/sgliSite/forms/forms.htm#FSGLI), and submit the completed form to the SPO.

Members may also reduce or decline coverage for their spouse at any later date. When a member cancels spousal coverage, the coverage remains in effect at the original level, at no cost to the member, for 120 days after the cancellation date.

5.A.3.8 Reinstating/ Increasing Family Coverage

See reference (a), 10.07
http://www.insurance.va.gov/SgliSite/handbook/handbook.htm and section 5.A.2.7 (Procedures for electing coverage or increased coverage previously declined or decreased) of this chapter.

5.A.3.9 Spousal Notification

Units must notify the member's spouse, by letter, when the member **cancels** Family Member SGLI coverage (or cancels SGLI coverage and had FSGLI in place). This is to inform the spouse that they have 120-days from the date the coverage is terminated to convert Family Member SGLI to commercial coverage. A recommended format for the spousal notification letter follows. A copy of the letter, the unit has sent to the spouse, should accompany any SGLV-8286/8286A forms sent to the SPO from members declining coverage.

An example of the spousal notification letter is on the following page.

Continued on next page

Exhibit 5.A.3.1, Notice to Spouse – Termination of Coverage

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

Commanding Officer
U. S. Coast Guard
Any Unit

123 Any Street.
Any City, ST 12345-1234
Staff Symbol: (xx)
Phone: 785-555-1234
Fax: 785-555-4321
Email: i.am.sender@uscg.mil

1741
DD Month Year

First Name Last Name
Street Address
City, ST Zip

Dear (Mr. Mrs.) (Salutation may be omitted)

We are writing to inform you of Servicemembers' Group Life Insurance (SGLI) or Family SGLI (spouse) coverage changes made by your active duty or reserve member spouse. The purpose of this letter is to notify you of the cancellation of [or impending termination of] your coverage so you may exercise the 120-day conversion benefit. When a member cancels spousal coverage, the coverage remains in effect, at no cost to the member, for 120 days after the cancellation date

You have 120-days from (*enter date of member's election*) to exercise this conversion benefit.

During this 120-day period you can convert this coverage to a policy with a commercial insurance company. Upon request, the Office of Servicemembers' Group of Life Insurance (OSGLI) will provide you with conversion information and a list of participating companies. You can get more information at the VA insurance website at www.insurance.va.gov, or by calling OSGLI at (800) 419-1473. You may also request this information by e-mail to OSGLI.OSGLI@PRUDENTIAL.COM, or writing to:

Office of Servicemembers' Group Life Insurance
290 West Mt. Pleasant Avenue
Livingston, New Jersey 07039

The block checked below indicates what action your spouse has taken in canceling coverage.
Your spouse elected to:

___ Cancel his/her SGLI life insurance. When a member declines SGLI for self or family coverage, coverage for the spouse is terminated.

___ Cancel his/her SGLI Family (spouse) Coverage

Sincerely,

F. M. LAST
Rank/Rate
U. S. Coast Guard
Commanding Officer/By direction

Exhibit 5.A.3.1

5.A.4 Quality Review of Beneficiary Designations and SGLI Elections

5.A.4.1 Introduction

This section prescribes the requirement for the SPO YN to conduct a quality review of a member's beneficiary designations (CG-2020D) and SGLI elections (SGLV-8286 and SGLV 8286A) before filing or distributing these forms.

5.A.4.2 Discussion

Anyone can read the instructions on the forms and verify that the member filled out the form in accordance with the instructions. But the bigger question is...Are the forms verified or filled out as the member intended (i.e. Member is married, yet the parents are listed as beneficiaries)? The question should be asked, *"Is this what you intended to do?"* The SPO YN is the ultimate quality assurance point for these documents and it is not just during the annual validation process.

5.A.4.3 Reviewer responsibilities

The SPO YN, responsible for the member's SPO PDR will, upon receipt of form(s), CG-2020D, SGLV-8286 and/or SGLV-8286A, review each designation/election to ensure compliance with the:

- instructions contained on each form.
- procedures and the references cited sections 5.A.1, 5.A.2 and 5.A.3 of this manual, ensuring:
  - applicable spousal notification letters have been prepared and sent.
  - required steps to reinstate or increase SGLI or FSGI coverage have been taken.

The reviewer will contact the member for clarification on any questionable or incomplete designation/election.

5.A.5 Casualty Reporting

5.A.5.1 Introduction

This information is provided to direct you through the process of casualty reporting.

5.A.5.2 Reference

(a) Military Casualties and Decedent Affairs, COMDTINST M1770.9, Chapter 1, Casualties

5.A.5.3 Reporting procedures

Casualty reporting procedures and disposition of personal effects are described in reference: (a).

Causality Reporting Examples are contained in Enclosure (7) to this manual. They include:

- Personnel casualty report message
- Next of kin notification
- Commanding Officer's letter to the next of kin
- Letter request for death determination

5.A.5.4 Inventory and Disposition of Personal Effects

In cases where a member dies or is missing, the commanding officer shall appoint an inventory board in accordance with section 11.K.2.b of reference (a). The inventory will be recorded on CG-3853, Personal Effects Inventory and Disposition form, and distributed as follows:

- Officer retains original
- One copy is to be packed with personal effects.
- Second copy is sent to next of kin (If personal effects are shipped to next of kin. Otherwise, second copy goes to Supply Center, Baltimore per section 1k.2.c of reference (a))

Copy: Unit PDR
Copy: COMDT (CG-1222) (if deceased, captured, missing or incapacitated) CGPSC ((epm), for enlisted/(opm) for officers) if absent at time of sailing, AWOL, AOL, or deserter.
Copy: Unit File

Continued on next page

5.A.5 Casualty Reporting, Continued

5.A.5.5 Disposition of Military Personnel Data Records (PDRs)

The unit shall forward Unit and Medical PDRs to the SPO within two days of:

- Declaring member a deserter
- Member's death

The SPO shall forward Unit, Medical, and SPO PDRs to Commander (adm-3), Coast Guard Personnel Command within 5 days of the date of death or date member was declared a deserter.

Note: Complete instructions for PDR maintenance and disposition can be found in the Military Personnel Data Records (PDR) System, COMDTINST M1080.10(series).

Section Overview

Introduction

This section will guide you through the procedures required for members with dependents. It will assist you in reporting dependency changes, and issuing dependent ID cards.

In this section

5.B.1 Dependency Information

5.B.1.1 Introduction

In order to avoid overpayment, underpayment and to determine eligibility for benefits and privileges administered by the uniformed services, members must notify their units/SPOs immediately upon a change in dependency status.

5.B.1.2 References

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series)
(b) Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and Other Personnel, COMDTINST M5512.1(series).
(c) Military Personnel Data Records (PDR System), COMDTINST M1080 (series), Encl. (6), Required Supporting Evidence for Material Military Payroll Transactions
(d) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(e) Military Civil and Dependent Affairs, COMDTINST M1700.1
(f) Reserve Policy Manual, COMDTINST M1001.28(series)

5.B.1.3 Responsibility

The member has responsibility for reporting dependency status changes. Complete a BAH Dependency Worksheet (CG-2020) (and other supporting worksheets if required by the instructions in this section and on the reverse of the Dependency Worksheet) upon initial accession **and if a member**:

- Gets Married, Separated or Divorced
- Has an incapacitated child who turns 18 (If the member is approaching retirement, forward supporting documentation regardless of the age of the child)
- Gains or loses a dependent (e.g., after a dependent dies, marries or divorces and reverts to dependent status)
- Has a questionable case of dependency

Also submit SGLV-8286, SGLI Election And Certificate, SGLV-8286A, Family Coverage Election (SGLI), and CG-2020D, Designation of Beneficiaries and Record of Emergency Data, whenever a married member is accessed into the service and when a member's marital status changes.

5.B.1.4 Final divorce decree not available

To avoid overpayment, members with no other dependents who are awaiting a copy of a final divorce decree should request payment of BAH, OHA and/or COLA at the with dependents rates be stopped effective the date the divorce will become final. The divorce decree must be provided when it becomes available.

Continued on next page

5.B.1 Dependency Information, Continued

5.B.1.5 Systems that need to be updated

When a member reports a change in dependency, the information is recorded in Direct Access, JUMPS for pay purposes, and in the Defense Eligibility Enrollment System (DEERS), to record eligibility for benefits and privileges.

5.B.1.6 Forms

This table shows the forms that are needed, as indicated, when a member has a change in dependency or there is a need to verify dependency status (e.g. Child over age 21). To determine when to use a form and the procedures for completing the form, consult the reference.

Form	**Purpose**	**Reference**
Application For Uniformed Service Identification Card- DEERS Enrollment (DD-1172)	Determine entitlement to ID cards, medical care, exchange, theater, and commissary privileges. Update DEERS database	Ref (b)
Designation of Beneficiaries and Record of Emergency Data (CG-2020D)	Casualty reporting, list next of kin and designate beneficiaries	Ref (d) 5-A
Dependency Worksheet (CG-2020) & BAH/Housing Worksheet (CG-2025)	Provide dependency information to SPO and also to determine eligibility for payment of BAH with dependents	Ref (a) Chap 3-D
DOD Guard and Reserve Family Member ID Card DD-1173-1	Identify dependents of Ready Reserve Members	Ref (b)
Full-Time Student Statement (CG-2020B)	Supporting documentation for a member claiming a child over age 21 as a dependent (Support Statement CG-2020A also required, see below).	Ref (b) & Ref (a) Chap 3-D
SGLI Election and Certificate (SGLV-8286)	Elect SGLI amount and designate beneficiaries	Ref (d) 5-A
SGLV-8286A, Family Coverage Election	Married members must make an election or specifically decline Family SGLI coverage	Ref (d) 5-A
Support Statement (CG-2020A)	Supporting documentation for a member claiming a child over age 21 (incapacitated or full-times student status), parent or parent-in-law as a dependent.	Ref (b) & Ref (a) Chap 3-D
Uniformed Services Identification and Privilege Card (DD-1173)	Identify individual eligible for dependent benefits and privileges	Ref (b)
Reserve Component Survivor Benefit Plan (RCSBP) Election Certificate (CG-11221)	Elect or change RCSBP coverage after completion of 20 years satisfactory service. NOTE: Elections/changes MUST be made within one year of the dependency change.	Ref (e) Ref (f) 8.C.7

5.B.2 BAH/Dependency Data Form (Computer Generated) and Designation of Beneficiaries and Record of Emergency Data (CG-2020D)

5.B.2.1 Introduction

The BAH/Dependency Data form is computer generated via Direct Access. Members update the information contained in the BAH/Dependency Data form by submitting a BAH Dependency Worksheet (CG-2020) with the new data to their SPO. Instructions for completing the CG-2020 are on the back of the form. Members must also submit SGLV-8286, SGLI Election and Certificate, SGLV-8286A, Family Coverage Election (SGLI), and CG-2020D, Designation of Beneficiaries and Record of Emergency Data, whenever their marital status changes.

5.B.2.2 References

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Chap 3-D
(b) Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and Other Personnel, COMDTINST M5512.1(series).
(c) Military Personnel Data Records (PDR System), COMDTINST M1080 (series), Encl. (6), Required Supporting Evidence for Material Military Payroll Transactions

5.B.2.3 Purpose

The Designation of Beneficiaries and Record of Emergency Data, CG-2020D, is an official document required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
- Name of person(s) receiving death gratuities
- Person(s) who receive allotment of pay if missing or unable to transmit funds
- Person(s) who receive unpaid pay and allowances

The BAH/Dependency Data form is an official document required by law for the use pertaining to:

- Record dependents as defined in the PAYMAN to determine dependency for BAH entitlement purposes
- Verify (on an annual basis) that dependents, on who BAH is being paid, continue to be related to and supported by the member.

Continued on next page

5.B.2 BAH/Dependency Data Form (Computer Generated) and Designation of Beneficiaries and Record of Emergency Data (CG-2020D), Continued

5.B.2.4 Annual Verification

Annually, beginning in October and not later than 30 November, members must verify their computer generated BAH/Dependency Data form and their Designation of Beneficiaries and Record of Emergency Data, CG-2020D. Refer to Section 5-C of this manual for procedures on the annual verification.

5.B.2.5 Other uses for the BAH/ Dependency Data form

The BAH/Dependency Data form may be used as partial supporting documentation as long as the individual claimed as a dependent remains a dependent.

Here are some examples of when the BAH/Dependency Data forms may be used as partial supporting documentation:

- Payment of family separation allowance and/or family separation - housing
- Payment of station allowances at the with dependents rate
- Payment of dislocation allowance at the with dependents rate
- When applying for dependent ID cards and DEERS privileges

5.B.2.6 Cases not to use the Dependency Worksheet (CG-2020)

Do not use the CG-2020 to designate a beneficiary or change amount of coverage for:

- National Service Life Insurance
- Servicemembers’ Group Life Insurance (use VA Form SGLV-8286)
- SGLI Family Coverage (Use form SGLV-8286A, Family Coverage Election (SGLI)).
- Government Life Insurance

Continued on next page

5.B.2 BAH/Dependency Data Form (Computer Generated) and Designation of Beneficiaries and Record of Emergency Data (CG-2020D), Continued

5.B.2.7 When to submit the Designation of Beneficiaries (CG-2020D

The CG-2020D must be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Anytime a member acquires an initial or additional dependents
- When any material change occurs in dependency status.
- (Separation, divorce, death of dependent, dependent entering the Armed Forces, voluntarily withdrawing dependency claim, etc.)
- Changes to the form occurring in any item

Note: When removing any dependent from the BAH/Dependency Data that originally required PPC approval of the dependent, a copy of the new BAH/Dependency Data form must be forwarded to PPC (lgl).

5.B.3 Tricare Dental Plan

5.B.3.1 Introduction

The TRICARE Dental Program (TDP) replaced TRICARE dental programs for active duty family members (TFMDP) and Selected Reserve (SELRES) personnel (TSRDP). There are no Direct Access entries associated with the Tricare Dental Plan.

5.B.3.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series) Chap 6-C
(b) http://www.tricaredentalprogram.com/tdptws/home.jsp
(TRICARE Dental Program Contractor website).
(c) TRICARE Dental Program Benefit Booklet
http://www.tricaredentalprogram.com/tdpforms/TDP_Benefit_Booklet_2010.pdf

5.B.3.3 Discussion

Members desiring coverage under the TRICARE Dental Plan must enroll through the contractor, United Concordia Companies, Inc. (UCCI). Enrollment in the plan is automatic for members previously enrolled in the Family Member Dental Plan (FMDP). All other active duty members and SELRES and IRR personnel must enroll to participate.

- TDP provides the same dental benefits to all participants.
- Premiums will be paid through payroll allotment from the sponsor's pay for family members of active duty personnel. In some cases, it may be direct billing.
- Premiums for reservists will be paid by deduction from the member's pay or by direct billing. Premium payments for a reservist's family members will be made by direct billing.

5.B.3.4 Eligibility / Enrollment requirements

See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/eligibility/eligibility.jsp) or reference (c), chapter 2.

5.B.3.5 TDP premiums and changes

TDP premium amounts change annually on February 1st. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/premiums/costshares_premiums.jsp) or reference (c), chapter 5.

Continued on next page

5.B.3 Tricare Dental Plan, Continued

5.B.3.6 Enrollment options	Individual and family enrollment options are available. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for more information.
5.B.3.7 Enrollment period	The minimum enrollment period is 12 months. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for exceptions.
5.B.3.8 Disenrollment procedure	See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for disenrollment procedures.
5.B.3.9 Automatic disenrollment	Separation, retirement or a family member's loss of eligibility (e. g. dependent child reaches age 21) will result in automatic disenrollment. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for more information.
5.B.3.10 Effective date of coverage / Evidence of coverage	Enrollment will be confirmed with the issuance of dental identification cards. Please do not seek dental treatment without confirmation of enrollment. If a member has received their identification card and are seeking care, contact United Concordia's Enrollment and Billing Member Services Department at 1-888-622-2256. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for more information.
5.B.3.11 New enrollment in the TDP	United Concordia handles the enrollment process. Enrollment must be initiated by the sponsor and is accomplished by completing a TDP Enrollment Form. Forms are available by calling United Concordia at 1-888-622-2256 to request a form, by accessing the United Concordia website at http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp, or from your Health Benefits Advisor. With the initial enrollment application, all new enrollees must submit a payment equal to the member's portion of one month's premium.

5.B.4 Applying for a DD Form 1173

5.B.4.1 Introduction

The DD Form 1173 is an ID Card used to identify individuals eligible for privileges administered by the uniformed services. This will guide you through the application process.

5.B.4.2 References

(a) Military Civil and Dependent Affairs, COMDTINST M1700.1
(b) Procedures for manually issued (non-RAPIDS) ID cards, DODINST 1000.13.
(c) Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and Other Personnel, COMDTINST M5512.1A, Chap. 15.

5.B.4.3 How to apply

This is the process for applying for a DD Form 1173

When	Then
the member is active duty CG and at the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is away from the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is on extended deployment outside CONUS	the dependent can renew an expired card at any military installation that issues ID cards.
the active duty member is retiring,	before retiring submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the active duty members is placed on the Temporary Disability Retirement List,	submit a DD Form 1172 to any military installation that issues ID cards.
the reserve member is retired with pay,	submit a DD Form 1172 for the dependent to any military installation that issues ID cards.
the member is a 100% disabled veteran,	submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the member is separating and is eligible for Transition Assistance benefits	submit a DD Form 1172 for the member and dependent(s) to the command holding the PDR.

Continued on next page

5.B.4 Applying for a DD Form 1173, Continued

5.B.4.3 How to apply (continued)

When	Then
The member is from an armed force of a foreign nation	• DD Form 1172
The member has a foreign marriage or divorce	• DD Form 1172 • Translated copy of foreign marriage certificate/divorce decree
The member has a dependent parent or parent-in-law	• DD Form 1172 • Support Statement, (CG-2020A) • Copy of member's tax return (IRS Form 1040/1040A showing parent claimed as dependent)
Member has a child, full-time in college, over age 21 but less than age 23.	• Support Statement, (CG 2020A) (*See note*) • Full-Time Student Statement, (CG-2020B) **Note**: The Support Statement, (CG 2020A) is required to be completed with the first application for an ID card when the child is age 21 or over. If there is a need to reissue a card, prior to the child's 23rd birthday, the sponsor may certify in block 89 of the DD Form 1172 that he or she is providing over 50% of the child's support.
Member has a child over age 21 incapable of self support	• DD Form 1172 • Support Statement, (CG-2020A) • Medical/psychological statement of incapacitation • Social Security Administration determination concerning Medicare Part A entitlement • Copy of member's tax return (IRS Form 1040/1040A showing child claimed as a dependent)
The member has an unremarried or unmarried former spouse AND this is an initial ID card issuance (the former spouse is not enrolled in DEERS)	• DD Form 1172 • Statement for Former Spouse, (CG-2020C) • Certified copies of marriage and divorce decrees

5.B.4.4 How to complete the DD Form 1172 and DD Form 1173

Detailed instructions on how to complete the DD Form 1172 and DD Form 1173 can be found in Ref (c).

5.B.5 Verification of Eligibility for the DD Form 1173

5.B.5.1 Introduction

This information is provided to aid you in determining the eligibility of a member's past and present dependents for the DD Form 1173.

5.B.5.2 Reference

(a) Military Civil and Dependent Affairs, COMDTINST M1700.1.
(b) Identification cards for members of the uniformed services, their eligible family members, and other personnel, COMDTINST M5512.1A, Chap. 15.

5.B.5.3 Verification of eligibility

Any ID card issuing unit can verify eligibility and issue original cards by using DEERS or by presentation of:

- Retirement orders
- DD-214
- Marriage, birth, or death certificate
- VA letter of certification

5.B.5.4 If eligibility cannot be established

When eligibility cannot be established through DEERS or by documentation presented then contact these offices;

Coast Guard	COMMANDER (RAS) COAST GUARD PAY & PERSONNEL CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591 (800) 772-8724/(785) 357-3416
Air Force	HQ AFCGPC/DPMDOP NORTHEAST OFFICE PLACE 9504 I H 35 NORTH SAN ANTONIO TX 78233-6636 (210) 652-2089
Marine Corps	COMMANDANT OF THE MC CODE: MMSR6 WASHINGTON DC 20380-0001 (202) 614-1031/1038

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5.B.5 Verification of Eligibility for the DD Form 1173, Continued

If eligibility cannot be established continued	**Army**	COMMANDER, TAPC ATTN: TAPC-PDO-IP 200 STOVALL AVE. ALEXANDRIA VA 22332-0474 (703) 325-9590
	Navy	COMMANDING OFFICER BUREAU OF PERSONNEL PERS-334 WASHINGTON DC 20370-5334
	USPHS	(301) 443-9000
	NOAA	(301) 443-8616

5.B.5.5 Entitlements on the DD Form 1173

Eligibility of the spouse and unmarried children of active duty members may be certified if information on the DD Form 1172 is the same as indicated on the approved BAH/Dependency Data form.

5.B.6 Reserve Family Member Identification Card

5.B.6.1 Introduction

The Reserve Family Member Identification Card (DD Form 1173-1) was developed for use by all military services. The Coast Guard uses it for identification only. It has no authorization for access to military benefits unless accompanied by a set of valid active duty orders or pay voucher.

5.B.6.2 Reference

(a) Procedures for manually issued (non-RAPIDS) ID cards, DODINST 1000.13.
(b) Identification cards for members of the uniformed services, their eligible family members, and other personnel, COMDTINST M5512.1(series), Chap. 16.

5.B.6.3 How to apply

The process for applying for a DD Form 1173-1:

If	Then
the member is from the Selective Reserve,	submit a DD Form 1172 to any unit authorized to issue ID cards
the member is from the Ready Reserve or Retired Reserve,	submit a DD Form 1172 to PPC (ras)

5.B.6.4 Dependent eligibility

A dependent is considered to be a spouse, child, stepchild, or ward.

If	Then the dependent is
the dependent's sponsor is in the Ready Reserve (which includes the Selective Reserve and the Individual Ready Reserve) or Retired Reserve,	eligible.
the dependent is over 21 or under 10, a former spouse, or requires dependency determination,	ineligible.

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5.B.6 Reserve Family Member Identification Card, Continued

5.B.6.5 Preparation

Commands designated as issuing activities for DD Form 2 CG (Reserve) are designated issuing activities for DD Form 1173-1. Issuing activities may issue DD Form 1173-1 upon receipt of a properly completed and verified DD Form 1172.

5.B.6.6 Application over 90 days old

At the discretion of the commanding officer, a DD Form 1172 verified more than 90 days before presentation to the issuing activity may be considered questionable for issuance of the DD Form 1173-1. Before refusing any person in this situation, the issuing activity should assist the applicant in attempting to contact the officer who verified the DD Form 1172.

5.B.6.7 Dependent not able to visit issuing office

In unusual circumstances where an eligible dependent cannot get to an issuing activity, a notarized statement setting forth sufficient facts to establish identity, a completed DD Form 1173-1, and the reasons for not going to the issuing office may be accepted as a basis for issuing a DD Form 1173-1.

5.B.6.8 Corrections

No DD Form 1173-1 will be issued which contains an erasure, alteration or strikeover. When a change is required on a card in the preparation stage, a new card will be prepared.

5.B.6.9 Instructions

See Ref. (b) article 16.6 (How to Prepare the DD 1173-1) for detailed preparation instructions.

5.B.6.10 DEERS enrollment

ID issuing activities should handle DD Form 1172 for the reserve family member ID card in the same manner as those for all other ID cards. In addition, place “X” in the pre-enrollment block in the upper left-hand corner of the form.

5.B.7 Information Concerning the DD Form 1172

5.B.7.1 Introduction

This information has been provided to guide you through the process of completing a DD Form 1172.

5.B.7.2 Reference

(a) Military Civil and Dependent Affairs, COMDTINST M1700.1
(b) Procedures for manually issued (non-RAPIDS) ID cards, DODINST 1000.13.
(c) Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and Other Personnel, COMDTINST M5512.1A, Chap. 11 and Attachment 3

5.B.7.3 Preparation of DD Form 1172

Detailed instructions on how to complete the DD Form 1172 can be found in Ref (c).

5.B.7.4 Section I, sponsor information

This section will be completed by or for the sponsor or applicant. Complete block 9 only when an ID card is issued to the sponsor.

5.B.7.5 Section II, dependent information

This section will be completed by or for the sponsor. Dependents under age 10 will be listed for DEERS enrollment purposes using the same guidelines for expiration of eligibility as though they were receiving a card. Do not list dependents already enrolled in DEERS every time a DD Form 1172 is submitted. For additional space use another DD Form 1172.

5.B.7.6 Section III, sponsor declaration and remarks

A DEERS check should be the first source for verification and the only substantiation if the applicant is enrolled. An active duty sponsor's refusal to apply for a DD Form 1172 shall be treated as nonsupport.

Continued on next page

5.B.7 Information Concerning the DD Form 1172, Continued

5.B.7.8 Reporting loss or theft of an ID card

The loss or theft of an identification card will be reported by entering the following statement in Section III:

"I certify that the identification card previously issued to (insert name of cardholder) was (insert "lost" or "stolen") under the following circumstances (give complete circumstances surrounding loss or theft). If the card is recovered I will surrender it to proper military authority."

5.B.7.9 Questionable cases

If the eligibility of a claimed dependent is questionable, call PPC (ras), 1-800-772-8724, for determination.

5.B.7.10 Privileges authorized

See Ref. (c), Attach. 3 for detailed instructions.

5.B.8 Defense Enrollment Eligibility Reporting System (DEERS)

5.B.8.1 Introduction

DEERS is a database operated by the Department of Defense that houses data on all military sponsors and dependents to support the benefits system.

5.B.8.2 Data on sponsors

Data on sponsors is provided to DEERS through magnetic tape submission from PPC and other uniformed services finance centers. USCG sponsors are enrolled and updated on DEERS when changes in the Direct Access database are transmitted to DEERS.

5.B.8.3 Procedures for transmitting data to DEERS

Procedures for updating the DEERS database using electronic on-line systems or floppy diskette applications are provided by the DEERS Support Office (DSO).

- Manual submissions of completed DD Form 1172s are not authorized.
- ID card issuing activities that do not have the capability to update the DEERS database using electronic on-line systems should contact PSC for local procedures used to update DEERS.

5.B.8.4 When to update DEERS

DEERS must be updated when:
- An ID card is issued.
- A member reports a change in dependency (e.g., birth, divorce) or a change of address that does not involve issuance of an ID card.
- The member's residence address must be updated within 30 days of a residential move such as during PCS or any other exchange in residence. Exceptions to this rule are those circumstances when a member is:
- Permanently assigned overseas.
- Assigned to a vessel.
- Assigned to a routinely deployable unit.
- Assigned to units the Commandant has determined should not be disclosed due to national security or safety concerns.

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5.B.8 Defense Enrollment Eligibility Reporting System (DEERS), Continued

5.B.8.5 Updating residential address

Member's can update their residential address one of the following ways:

- At any Real time Automated Personnel Identification System (RAPIDS).
- By calling the DEERS Support office (DSO) listed below.
- In writing to: DSO, 400 Gigling RD, Seaside, CA 93955-6771.
- By faxing address change to DSO at: (831) 655-8317.
- By E-mail to DSO at: addrinfo@osd.pentagon.mil.
- At any Military Treatment Facility (MTF).

5.B.8.6 DEERS inquiries

Beneficiaries with questions or problems with DEERS enrollment may call the DEERS beneficiary telephone center to verify the information contained in the database.

Note: The beneficiary center can only update residence address information in DEERS over the phone. If information other than the residence address is incorrect, the caller will be instructed to contact their servicing personnel office to have the database updated.

5.B.8.7 Phone numbers for DEERS beneficiary telephone center

If calling from	Then dial
California	800-334-4162
Alaska or Hawaii	800-527-5602
All other states	800-538-9552

5.B.8.9 Reports from the DEERS database

Information in the DEERS database can be used to produce enrollment listings, pantograph listings, demographic reports and other type of reports.

5.B.8.10 Obtaining DEERS database reports

Units may request DEERS database reports from the USCG Liaison at the Defense Manpower Data Center (DMDC).

The phone number for USCG Liaison at DMDC is:
(831)-583-2400 Ext 4361.

Section Overview

Introduction

This section provides you with the necessary procedures for annual verification of entitlements, statement of creditable service, security clearances, and information regarding the PDIF and PDE.

In this section

The following topics are covered in this section.

5.C.1 Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts

5.C.1.1. Introduction

Annually, beginning in October and not later than 30 November, members must verify their BAH, dependency, beneficiaries, SGLI and emergency data.

5.C.1.2. Reference

(a) Military Personnel Data Records (PDR System), COMDTINST M1080 (series), Encl. (6), Required Supporting Evidence for Material Military Payroll Transactions
(b) Coast Guard Policy on the Possession of Firearms and/or Ammunition by Coast Guard Military Personnel, COMDTINST 10100.1 (series)
(c) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3
- ☞ Part II, Pay Entitlements, Chapter 10, Housing Allowances and
- ☞ Part III, General Transactions, Chapter 4, Dependency, Decedent Affairs, SGLI, and Contact Information

(d) U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 3.D.3
(e) Military Assignments and Authorized Absences, COMDTINST M1000.8

5.C.1.3. Annual verification process

Here is how verification of the BAH, Dependency, SGLI, Beneficiaries and Emergency Contacts works when the unit and SPO are not co-located. The Annual Validation and PDR review (including review of the EI-PDR) should be conducted jointly with the member when the unit a SPO are co-located:

Stage	Who Does It/ When	What Happens
1	SPO/1st Week of October	Reviews PDRs for missing supporting documentation (per reference (a)) and forwards the following forms and worksheets to units with a listing of any missing supporting documents: • Direct Access BAH/Dependency Data Forms • Direct Access Emergency Contact Information Report • Copies of members' SGLI and Family SGLI Election forms (SGLV-8286 and SGLV-8286A) • Copy of members' Designation of Beneficiaries & Record of Emergency Data (CG 2020D) forms

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5.C.1 Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

5.C.1.3. Annual verification process **(continued)**

Stage	Who Does It/ When	What Happens
(Continued from previous page)		**Note:** If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms and Designation of Beneficiaries & Record of Emergency Data forms, this step is unnecessary as the unit can generate the BAH/Dependency Forms and Emergency Contact Information Reports from Direct Access using Command Self-Service access.
2	Unit/ Upon Receipt	Forwards all forms and Emergency Contact Reports to members for verification. Also provides blank (or instructions for completing) DD Form 2760, Qualification to Possess Firearms or Ammunition. Per reference (b), DD Form 2760 must be completed annually.
3	Member NLT 30 Nov	1. Reviews Designation of Beneficiaries & Record of Emergency Data Form (CG-2020D) for accuracy. Makes the following entry in Item 15 (remarks) if there are no changes: _________: reviewed, no changes. ____________________ (date) (member's signature) Or, completes a new form CG-2020D (http://www.uscg.mil/ppc/forms/) if there are any changes. 2. Reviews BAH/Dependency Data for accuracy: • Annotates any necessary changes or corrections. • Signs and dates in the “Members Certification” area. • Returns forms to SPO, includes Dependency Worksheet (CG-2020), and supporting documentation (e.g. Child’s Birth Certificate, Member’s Marriage Certificate or Divorce Decree) if adding/removing BAH eligible dependents. 3. Reviews Emergency Contact Report for Accuracy: • Enters any changes or corrections to Emergency Contact info in Direct Access using self-service. Or, if unable to access the system, annotates changes on report and returns to SPO for data entry. 4. Reviews SGLI (SGLV-8286) and Family SGLI (SGLV-8286A) elections. Completes new form(s) (http://www.insurance.va.gov/sgliSite/forms/forms.htm) if there are changes to the beneficiary designation(s) or the member desires to change coverage elections. It is not necessary to re-complete the SGLV-8286/8286A if the current editions of the forms are used and only the “Rank, title or grade” field or the “Current Duty Location” field has changed (e.g. A new form isn’t needed upon advancement, promotion, PCS or unit name change.). The Health-Related questions in Part 4 of the SGLV-8286 and in Part III of the SGLV-8286A are only required to be completed when the member is adding coverage or increasing coverage (after previously electing no or reduced coverage).

Continued on next page

5.C.1 Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

5.C.1.3. Annual verification process **(continued)**

Stage	Who Does It/ When	What Happens
Continued from previous page		5. Provides any missing supporting documentation requested by the SPO (e. g. Social Security Card, Birth Certificates for Member and Children, Marriage Certificate, etc.) 6. Completes DD Form 2760.
4	SPO	Conducts a Quality Review of all elections and beneficiary designations (See Sec. 5.A.4 of this manual) and enters, into Direct Access, any changes or corrections the member noted using the appropriate process per reference (c): • **Dependent/Beneficiary** to add or change information about dependents (Note: Appropriate Direct Access entries must be completed if dependency change impacts entitlements). Generates a new BAH/Dependency form and forwards to member for signature. • **Emergency Contact** to add or change emergency contact information. • **Life and AD/D Benefits** to make SGLI election changes (Note: Data entry is only required when member is changing a SGLI/Family SGLI election, i.e. increasing, decreasing or declining coverage. **No data entry is required if the member is only updating beneficiary designation.**) • Per reference (a), files SGLI forms, BAH/Dependency forms, supporting documentation, and CG-2020D forms in the SPO PDR and forwards copies of any newly completed forms and supporting documentation to CG PSC for the IE PDR.
5	SPO	Follow up with unit on the status of any member who fails to complete annual validation.

5.C.2. Requesting Statements of Creditable Service

5.C.2.1 Introduction

This will assist you in requesting a Statement of Creditable Service (SOCS) and/or a Statement of Creditable Sea Service (SOCSS).

5.C.2.2. Purpose

A SOCS can effect the member's pay by setting the Pay Base Date, Active Duty Base Date as well as Sea Pay. A SOCSS documents creditable Sea Service history to determine cumulative career sea time for pay purposes. This document only lists vessels that are sea pay eligible. A SOCSS will only be issued for members who are having a SOCS completed and members who have a documented discrepancy in their sea time.

5.C.2.3. When to Request

Request a SOCS/SOCSS whenever the member's service dates (ie Active Duty Base Date, Pay Base Date) and the member’s sea time are incorrect.

Note: Do not ignore suspected sea time errors simply because a member is not currently assigned to a sea pay eligible vessel.

5.C.2.4. Documentation Needed

For PPC (ses) to generate an accurate service statement we will require all of the member's prior service documentation to be scanned and emailed to us.

For personnel with <u>other than Coast Guard or Coast Guard Reserve</u> prior service include:

- All contracts.
- 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).

Note: For National Guard service, you may contact the State Adjutant Generals' Office listed on this website http://www.agaus.org/resources.asp.

If the member <u>has prior Coast Guard or Coast Guard Reserve</u> service, the SPO will ensure DD-214s and contracts are viewable in the EI-PDR and that JUMPS accurately reflects service in the appropriate segments.

Continued on next page

Requesting Statements of Creditable Service Continued

5.C.2.4. Documentation Needed (cont'd)

- For Reservist Duty, all Reserve Retirement Point Statements for the periods in question.
- A Transcript of Sea Service, if available from the U.S. Navy.
- All History of Unit Assignments that cover all of the time on the DD-214. This is used to verify sea time if no Transcript of Sea Service is available from the U.S. Navy or the Marine Corps.

The individual is the primary resource in furnishing this information. (Documentation can be ordered from: http://www.archives.gov/veterans/evetrecs/). A SOCS will not be completed for a member who has no break in service, unless there is prior non-Coast Guard military service.

5.C.2.5. Documents Containing Errors

If you request a SOCS with a DD-214 that is incorrect, our SOCS will mirror the DD-214 that we receive and would consequently be incorrect, possibly putting the member in an incorrect pay status.

If you have a dispute with the accuracy of a DD-214, you can request a Board of Corrections to Military Records by completing the DD Form 149 at The National Archives website: http://www.archives.gov/veterans/military-service-records/correcting-records.html. For additional information, please visit http://www.uscg.mil/legal/BCMR/BCMR.asp.

5.C.2.6. How to Request SOCS/SOCSS

For all SOCS/SOCSS requests the SPO should contact PPC Customer Service **via an online trouble ticket** or **send an email to CustomerCare.PSC@uscg.mil** and provide the following information:

- Member's Employee ID and full name
- Whether or not member has any prior service - all documents will need to be scanned and attached (Note: Use the web-form at http://cgweb.ppc.uscg.mil/ccb to attach documents to trouble-tickets)
- A very descriptive narrative as to the problem as well as the reason for the SOCS/SOCSS
- SOCS date, if member has already had a SOCS completed but for some reason it is thought to be incorrect.

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5.C.2. Requesting Statements of Creditable Service, Continued

5.C.2.6. How to Request SOCS/SOCSS (cont'd)

Note: Do not request SOCS completion status less than 120 days from initial request date.

5.C.2.7. Interim Service/Sea Service Adjustment

Because it sometimes takes so long to receive records from the National Personnel Records Center and from other Armed Services, we can offer the member an **Interim Adjustment**.

This interim adjustment is based off the DD-214 provided PPC (SES/S4) by the member's SPO.

Because there is the possibility that the DD-214 from the prior service may be incorrect, the SPO must counsel the member that they may be overpaid. Requests for an interim adjustment must contain the following sentence:

"The member has been counseled and understands that if the total sea time/prior service added, based on the DD-214, is not supported by the prior service records, then the member will be in an overpaid status."

The purpose of the Interim Adjustment is to help the member get his pay corrected in a timely manner. PPC (SES/S4) will only use blocks A and B for pay base date purposes and will not count any active or inactive time. A SOCS will still be completed once all of the information from the National Personnel Records Center and the member's prior service has been received from the SPO/member. An interim adjustment in no way speeds up the casework process. An Interim Adjustment will be completed as soon as it has been received by PPC (SES) and has been approved for an adjustment.

5.C.3. Personnel Data Information File (PDIF)

5.C.3.1. Introduction

The Personnel Data Information File (PDIF) is a Direct Access generated summary of personnel data.

5.C.3.2. Reference

(a) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3, Part IX, Reports and Queries

5.C.3.3. When will units receive a PDIF

Units can expect a PDIF to be provided by the SPO at the following times:

- Within 5 working days after a member reports in PCS
- Upon the request of the unit

Note: If you are not receiving the PDIFs for all of the members assigned to your unit, contact the SPO and ask them why you are not receiving them.

5.C.3.4. SPO to Unit Transmission

The SPO has the ability to send PDIFs to the unit via E-mail or by printed copy via regular mail. Units should inform their SPO which method is preferred.

5.C.3.4. Direct Access Path

Enterprise or Direct Access Content Menu > Develop Workforce > Manage Competencies (GBL) > Report > PDIF

5.C.4. Personnel Data Extract (PDE)

5.C.4.1. Introduction

The Personnel Data Extract (PDE), CG-4902, is periodically produced by Direct Access and provides important personnel database information.

5.C.4.2. Reference

(a) Direct Access Online Manual
SWE PDE (Self Service for Members)
Warrant PDE (Self Service for Members)
Command Access to SWE PDEs (Self Service for Commands)

5.C.4.3. The PDE

The PDE is provided to give the member a description of all the items in the database concerning the next servicewide exam cycle or warrant officer appointment cycle. It is issued prior to each active and reserve exam cycle. Follow these rules upon receipt of a PDE:

If	Then
no errors are found,	member signs and returns to unit
errors are found or suspected,	forward to the SPO with necessary supporting documents

5.C.4.4. Direct Access Path

Field units have the capability to view/print SWE PDEs for their enlisted members. Once PPC (adv) creates PDEs for a SWE cycle, the unit may access the SWE PDEs for individuals or entire departments. This process is available to DA users with "Self Service for Commands" access level and may be used on a For Official Use Only (FOUO) basis.

Individual SWE PDE:
- Self Service> Self Service for Commands> Use> PDE.

SWE PDEs for all members of a department:
- Self Service for Commands> Reports> PDE by Dept Report

Members may view both their SWE and CWO PDEs by following this menu paths in Direct Access:
- Self-Service > Employee > View > SWE PDE or > Warrant PDE

Note: Members are to verify that any needed corrections have been made by the SPO. This verification must be done before the PDE correction deadline indicated in the SWE announcement message.

5.C.5. Security Clearances

5.C.5.1. Introduction

This has been provided to help you locate the policies and procedures for maintaining personnel security clearance information.

5.C.5.2. Reference

(a) Personnel Security and Suitability Program, COMDTINST M5520.12(series), Chap. 2, Administrative Procedures.

5.C.5.3. Personnel Security Record

When the Central Adjudication Facility (CAF) makes a favorable security determination, notification is made via Direct Access updates and by a certificate of clearance known as the source document. This source document shall have a properly executed SF-312 and CG-5588 attached and is filed in Part 3 of the Unit PDR, if Unit PDR is not kept file in Part 2 of SPO PDR.

5.C.5.4. Preparation and Maintenance of Security Documents

Policies and procedures governing the preparation and maintenance of security documents can be found in the PERSEC.

5.C.6. Transcript of Sea Service (TOSS)

5.C.6.1. Introduction

A Transcript of Sea Service (TOSS (CG PPC-1075)) is used to document service on board Coast Guard vessels for the purpose of obtaining a Merchant Marine License. Transcripts of Sea Service (TOSS) only for Coast Guard members, and former Coast Guard members, who want to receive their Mariners License. The TOSS will chronicle the vessels that a Coast Guard member served aboard during their career. This Sea Duty may have been on either a Sea Pay or Non-Sea Pay eligible vessels but must have been documented. We do not provide small vessel documentation, please go to the Merchant Maritime Center (NMC) http://www.uscg.mil/nmc/default.asp and download the Small Vessel Sea Service From CG-719S http://www.uscg.mil/nmc/forms/application/cg719s.pdf.

The Transcript of Sea Service lists information regarding a member's sea service, including:
- Names of vessels
- Shaft Horsepower
- Dates the member served on each vessel
- Rank at time of departure from each vessel

Note: This document does not serve to verify creditable sea service for pay purposes (refer to 5-C-4 of this section).

5.C.6.2. How to obtain a Transcript of Sea Service

For TOSS requests, the individual or SPO should contact PPC Customer Service via a by submitting a trouble-ticket or sending an email to CustomerCare.PSC@uscg.mil and provide the following information:

- Requestor's full name
- Requestor's EmpID (or if no EmpID a SS#)
- Requestor's approximate period(s) of service
- Requestor's desired manner and address to have the TOSS sent to them (i.e., email or postal mail)
- It would be helpful to also include a rough list of the vessels the requestor has served on and thinks should be included on the TOSS.

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5.C.6. Transcript of Sea Service (TOSS), Continued

5.C.6.3. Distribution of CG PPC-1075

PPC issues CG PPC-1075, Transcript of Sea Service. The CG PPC-1075 is emailed to the SPO or separated member, unless no email available then it is mailed to the separated member.

Upon receipt, the SPO will forward the original TOSS to the member and file a copy in SPO PDR.

Section Overview

Introduction

This section provides you with the information needed to understand and perform miscellaneous personnel transactions that are not covered in any other section of this manual.

In this section

5.D.1 Leave Authorization (CG-2519)

5.D.1.1 Reference

(a) Military Assignments and Authorized Absences, COMDTINT M1000.8
(b) Coast Guard Pay Manual, COMDTINST M7220.29(series), Chap 3.A.5.g., BAS Policy
(c) ALCOAST 425/09, Paternity/Adoption/Maternity Leave Accounting

5.D.1.2 CG-2519 usage

The Leave Authorization (CG-2519) is used to authorize:

- Regular, sick or emergency leave
  Note: The CG-2519 is only required for sick leave in excess of 2 days.
- Authorizing a member to attend to associated family needs following the birth or adoption of a child (Adoption Leave, Maternity Leave or Paternity Leave).

5.D.1.3 Do NOT use the CG-2519 for Compensatory Absence in conjunction with TDY/PCS orders

The Leave Authorization (CG-2519) must not be used for compensatory absence (CA) in the following instances:

- Periods of CA which are associated with PCS
- Periods of CA in conjunction with TDY orders
- CA, unless such absence is granted consecutively with leave

5.D.1.4 Do NOT use the CG-2519 for Administrative Absences

An administrative absence is a period of authorized absence, not chargeable as leave. Examples of administrative absences include:

- Hometown Recruiting Program.
- Relocation and familiarization when in receipt of PCS orders.
- Allowing members to return to their old duty stations to move their families to their new duty stations when PCS orders were issued and executed on short notice (fewer than 60 days).
- Allowing retiring and involuntarily separated members time to participate in pre-separation job search and house hunting activities prior to separation.

The policy for granting administrative absences is provided in Ref (a). Procedures for administrative absences are provided in section 5.D.10.

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5.D.1 Leave Authorization (CG-2519), Continued

5.D.1.5 Preparation of the CG-2519

The CG-2519 can be typed, prepared using **USCG Adobe Forms** **(**http://www.uscg.mil/forms/cg/CG_2519.pdf), or handwritten.

Items 1-7 are completed prior to departing.

The space below item 8 is used to indicate if the member used more than one type of absence or if the member used an absence type not listed on the form; Adoption Leave, Maternity Leave or Paternity Leave. Units outside CONUS need to list regular leave outside CONUS (AO) and regular leave inside CONUS (AI). List types and inclusive date in chronological order.

Follow these procedures for completing the CG-2519 (Rev. 06/2004).

Item	Description
1	Enter the member's last name, first and middle initials.
2	Enter rate/rank of the member.
3	Enter member's Employee ID Number (EMPLID).
4	Enter the unit where the member is assigned.
5	Enter the complete address and phone number.
6	Enter the type (Regular Leave, Emergency Leave, Sick Leave, or Compensatory Leave) and number of days of authorized absence. Leave blank for Adoption Leave, Maternity Leave or Paternity Leave and handwrite the Absence type in the space below item 8. If filling the form out in USCG Adobe Forms you can enter Adoption Leave, Maternity Leave or Paternity Leave in the "**TRANS. NO**" field in the lower, right-hand, corner of copy 1 of the form - TRANS. NO: Adoption Leave.
7	DEPARTURE: Enter the time and date absence begins. **Note**: This entry would normally be the time and date normal liberty begins (a day of duty) and the day before the actual first day of leave/absence.
	RETURN: Enter the time and date the absence expires. **Note**: This entry would normally be the time and date the member is expected to be back at the work site/unit (a day of duty) and is the first day after the last day of leave/absence.
	AUTHORIZED OFFICIAL: Sign and date.
8	CHANGE ENDORSEMENT Pen and ink changes to item 7 are NOT allowed. Enter leave date and times if different from those authorized.

5.D.1.6 Disposition

Forward part 1 to the SPO **immediately** upon member's return from leave. Note: Per Chapter 1 of this manual "*Communication between the member, unit, and the SPO*", Leave information may be transmitted to the SPO via the communication method preferred by the unit and SPO.

5.D.2 Leave Carried over in Excess of 60/75 Days

5.D.2.1 Introduction

Members may be authorized to carry more than 60/75 days leave into a new fiscal year, if the provisions of reference (a) (as may be modified by temporary program expansion or enhancements) are met.

5.D.2.2 Reference

(a) Military Assignments and Authorized Absences, COMDTINT M1000.8

5.D.2.3 Leave accrual policy

The National Defense Authorization Act for Fiscal Year 2010, Section 504 authorized all Coast Guard members to accrue up to 75 days of leave until the end of Fiscal Year 2013. Leave balances for active duty personnel must be at 60 days or less by 30 September 2013 to avoid loss.

The Coast Guard Authorization Act of 2010 included updated special leave accrual (SLA) for all Coast Guard military personnel due to participation in contingency operations such as the Deepwater Horizon Response and Operation Unified Response in Haiti. In accordance with the act all Coast Guard military members, active and reserve, are authorized to accrue earned leave in excess of 75 days. This amount is retroactive to 30 September 2010.

5.D.2.4 Maximum Leave Balance Caryover Totals (FY10 – FY-13)

The following are the maximum leave balance carryover totals for FY10-FY13:

End of FY	Carryover Limit	Reference
30SEP10	No Limit	CG Authorization Act of 2010
30SEP11	No Limit	CG Authorization Act of 2010
30SEP12	75 Days	Sec 701 of Title 10, U.S. Code
30SEP13	60 Days	Sec 701 of Title 10, U.S. Code

Any earned leave shown as lost on a military member’s Leave and Earnings statement (LES) for October will be restored and will be reflected on the member’s Les no later than April of the next year. No action is required by the member.

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5.D.2 Leave Carried over in Excess of 60/75 Days, Continued

5.D.2.5 Period in which to use leave carried over from previous fiscal year(s)

Members who are authorized to carry over leave in excess of 60/75 days to a maximum of 120 days due to service in an Imminent Danger Pay area for a continuous period of at least 120 days in a fiscal year, assignment to a deployable ship or mobile unit, and deployed or operated away from their designated homeport or home base for a continuous period of at least 60 days, or performed duty, on or after 29 Aug 2005, designated by the Secretary of Homeland Security as duty qualifying for carryover leave, have three years to use any special leave accrual (SLA) (Note: For SLA that is earned between 1 October 2008 and 1 October 2010 must be used within four years.). Any such leave will automatically be carried forward until used, or until the three year or four year “window” has closed. The carry over balance will not be reduced until all of the regular leave accrued for the year has been used.

For example:

> A member is authorized to carry forward 80.0 days on 1 October 2008 (5 days out of the 80 days is carryover leave). During fiscal year 2009 this member uses 32 days leave and accrues 30 days leave. This reduces the member’s carryover leave balance from the prior year to 3 days (the 2 days over 30.0 coming off the carry over). On 1 October 2010, JUMPS will automatically carry 78.0 days forward (30 days accrued for fiscal year 2009 plus 3 days carried over from the prior FY), since the 4 year window is still open.

Members who are authorized to carry over leave in excess of 60/75 days to a maximum of 90 days due to (a) service in support of a Commandant approved contingency operation, and (b) do not qualify for 120 days leave carryover as described above, have until the end of the **second** succeeding fiscal year to utilize the carry over leave. The carry over balance will not be reduced until all of the regular leave accrued for the year has been used.

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5.D.2 Leave Carried over in Excess of 60/75 Days, Continued

5.D.2.6 Procedures

Requests for SLA must be submitted to PPC (MAS) not later than 1 December following the end of the preceding fiscal year (30 September) for processing. Procedures for individual members and units are provided below. These procedures do not to apply to SLA earned in support of a Commandant-approved contingency operation, guidance for these requests will be provided in the directive which authorizes the SLA.

5.D.2.7 Procedures for carrying over leave of more than 60/75 days for a member

If a member believes that he/she is **qualified** to carry over more than 60/75 days of leave into a fiscal year, then the following steps must occur:
Note: A new request must be submitted by the member if he/she becomes qualified again for additional days to be carried over.

Step	Who Does It	Action Taken
1	Member	Submits a memo, via the chain of command, to PPC (MAS) with: • a description of the reason the member was prevented from using leave. • an estimate of the total number of days to be carried into the new fiscal year.
2	Unit	Endorse the letter and send to PPC (MAS) NLT 1 December.
3	PPC (MAS)	Will accumulate all requests and will process them immediately following the **March** end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made. The member's **April** LES will reflect restoration of any leave credited.

5.D.2.8 Procedures for multiple members at a unit

If multiple members of a unit are qualified to carry over more than 60/75 days of leave into a fiscal year, then the unit must utilize this process. A new request must be submitted by the unit if a multiple number of members assigned to the unit become qualified again for additional days to be carried over.

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5.D.2 Leave Carried over in Excess of 60/75 Days, Continued

5.D.2.9 Procedures for multiple members at a unit (cont'd)

Step	Who Does It	Action Taken
1	Unit	Must submit a memo or message to PPC (MAS) by, 1 December, with: • A listing of each entitled member of the unit. • An estimate of the total number of days to be carried into the new fiscal year for each member. • And the qualifying circumstances (deployed for Operation XXX, back to back ALPATS, etc.).
2	PPC (MAS)	Will accumulate all requests and will process them immediately following the **March** end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made. The member's **April** LES will reflect restoration of any leave credited.

5.D.3 Sale of Special Leave Accrual

5.D.3.1 Introduction

This section provides the process for enlisted members to be compensated for leave in excess of 120 days at the end of the fiscal year.

5.D.3.2 Discussion

Per paragraph 4 of ALCOAST 396/08, enlisted members, who have more than 120 days leave at the end of the fiscal year may make a one time election to be compensated for any leave in excess of 120, up to 30 days, at the end of that fiscal year. An enlisted member may only exercise this option once. Any days compensated under this section will be deducted from the 60-day career limit of payable accrued leave days. This provision is intended for members assigned to mobile or deployable units or entitled to hostile fire or imminent danger pay. Officers are not eligible for this entitlement

5.D.3.3 Special Leave Accrual Payment Process

This is the Special Leave Accrual Payment process.

Stage	Who does it	Description	When
1	Member	completes Form CG-2046, Application to Sell Special Leave Accrual (SLA)	Between 1 October and 30 November
2		forwards completed CG-2046 to Servicing Personnel Office (SPO)	
3	SPO	verifies that all leave documents for the previous fiscal year have been submitted in Direct-Access and have processed through JUMPS	Upon receipt of form from member
4		forwards completed CG-2046 to PPC (mas) by fax to the number on the form or to PPC (ccb) by e-mail to the address on the form	Not later than 1 December
5		files original CG-2046 in Section III of the member's SPO Personal Data Record (PDR) and sends a copy to CGPSC (psd-mr) for I-PDR	

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5.D.3 Sale of Special Leave Accrual (cont'd)

5.D.3.3 Special Leave Accrual Payment Process **(continued)**

Stage	Who does it	Description	When
6	PPC (mas)	verifies member's leave balance in JUMPS and ensures member has not previously received payment for SLA. Submits an H414 (Adjust Leave Balances) transaction and a H604 (Miscellaneous Credit) transaction to effect payment.	Prior to the cutoff date for the first JUMPS compute cycle following receipt of the CG-2046 from the SPO (Provided the form is received at least 3 business days prior to cutoff, otherwise the transactions will be submitted in time for the next cycle)

5.D.3.4 Form CG-2046

Form CG-2046, Application to Sell Special Leave Accrual (SLA), is available at http://www.uscg.mil/ppc/forms/.

5.D.4 Issuance of the Common Access Card (CAC)

5.D.4.1 Introduction

The Common Access Card (CAC) is used as a means of identifying military, DoD and Coast Guard government employees and contractors. The CAC can be issued at any Real-Time Automated Personnel Identification System (RAPIDS) to military, civilian and eligible contractors. Location of RAPIDS sites can be found at: http://www.dmdc.osd.mil/rsl/.

5.D.4.2 Reference

(a) Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel, COMDTINST M5512.1(series).

5.D.4.3 Use of "RAPIDS" facilities is mandatory for ID Card issuance

On 1 November 1996 the issuance of ID Cards through the Real-Time Automated Personnel identification Card System (RAPIDS) became mandatory. Manual preparation of ID cards is prohibited except in the following circumstances:

- Afloat units may issue DD Form 2 (Active) on a case-by-case basis, when underway and a RAPIDS facility is not available.

5.D.4.4 Availability of RAPIDS Facilities

Under the DEERS/RAPIDS Cross-Service Support Agreement, each of the seven Uniformed Services RAPIDS facilities agrees to verify identity and eligibility and issue ID Cards to certain categories of eligible persons regardless of the parent Service or DoD affiliation.

RAPIDS sites have been established within reasonable distances of most units. All Coast Guard ISCs, and most Sector Offices are designated RAPIDS sites. Most large Department of Defense commands, active and reserve, are designated RAPIDS sites.

The following web site gives the three closest Military ID issuing facilities to a person's zip code, city or state. http://www.dmdc.osd.mil/rsl.

Coast Guard units unable to determine their supporting RAPIDS site should contact the Coast Guard DEERS Program Manager, CGPSC (PSD-FS), via email to ARL-PF-CGPSC-PSDFS-DEERS@uscg.mil or by calling (202) 493-1928, for assistance

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5.D.4 Issuance of the Common Access Card (CAC), Continued

5.D.4.5 Categories of Personnel who are eligible for a CAC

The following categories of personnel are authorized a CAC:

- Active duty members.
- Members of the SELRES.
- Coast Guard Civilian Employees (both Appropriated and Non-appropriated fund activity (NAFA).
- Contractors whose contracts authorize a CAC for computer access or frequent visits to DoD facilities.

5.D.4.6 Categories of personnel that can be cross-serviced

Under the DEERS/RAPIDS Cross-Service Support Agreement, each of the seven Uniformed Services RAPIDS facilities agrees to verify identity and eligibility and issue ID Cards to certain categories of eligible persons regardless of the parent Service or DoD affiliation. This includes:

- Active, Reserve, and Retired members of any service on active duty for 31 days or more.
- Retired Reserve members of any service who have reached their 60th birthday.
- Family members of sponsors on active duty for 31 consecutive days or more.
- Family members of retirees.
- Family members of reservist.
- Unremarried or unmarried former spouses previously enrolled DEERS.
- Medal of Honor recipients and their eligible family members.
- 100% disabled veteran’s and their family members.
- DoD Civilian and contractor employees.
- Military affiliate (formerly foreign military).
- Active Duty, Retired, and Reserve members of any service.

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5.D.4 Issuance of the Common Access Card (CAC), Continued

5.D.4.7 Categories of personnel that cannot be cross-serviced

The following categories of personnel cannot be cross-serviced:

- Initial verification for unremarried or unmarried former spouses.
- Incapacitated children.
- Other individuals who require a dependency determination (over 50% support) (i.e., wards, parents, parents-in-law)
- Retirees from other Services and former members not currently enrolled in DEERS.
- Illegitimate child of a male sponsor, when paternity has not been judicially determined.
- Illegitimate child of sponsor's spouse, when the sponsor is a member of another Service.
- Navy and Marine Corps dependents residing in the Philippines
- Abused Dependents.

Contact PPC (ras) for Coast Guard members, dependents, and beneficiaries who fall into the categories than can not be cross-serviced.

5.D.5 Manual Preparation of the DD Form 2 CG (Active)

5.D.5.1 Introduction

Afloat units may issue DD Form 2 (Active) on a case-by-case basis, when underway and a RAPIDS facility is not available. This section provides the procedure for manual preparation of the DD Form 2 CG (Active). Procedures for all other card types can be found in COMDTINST M5512.1A, Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel.

5.D.5.2 Preparation

Prepare the DD Form 2 CG using a typewriter. All dates will be in YYYYMMMDD format. Most entries on the card are self-explanatory, there are a few exceptions:

Block	**Description**
Grade	• For pay grades E-1 to E-3, enter NON PETTY OFFICER. • For pay grades E-4, E-5 or E-6, enter PO3 (E-4), PO2 (E-5), or PO1 (E-6). • For pay grades E-7, E-8 or E-9, enter CPO (E-7), SCPO (E-8), or MCPO (E-9). • For pay grades CWO2 to CWO4 enter CWO (W-2), (W-3), (W-4), as appropriate. • For pay grades O-1 to O-10, enter ENS (O-1), LTJG (O-2), as appropriate. • For Cadets enter CDT.
Expiration Date	• Active duty enlisted, enter expiration of enlistment. • Cadets, enter expected date of graduation. • Reservists on active duty, enter expiration of active duty. • Officers, enter INDEFINITE.
Signature	Type the full name below the line, member signs in black or blue ink above typed name.

Continued on next page

5.D.5 Manual Preparation of the DD Form 2 CG (Active),
Continued

5.D.5.2 Preparation (cont'd)

Block	Description
Social Security No.	Enter 9 digit SSN in format 000000000.
Blood Type	Enter the member's blood type (e.g., B-, O+).
Geneva Convention	Refer to the table below or see COMDTINST M5512.1(series), Attachment 13, and enter I, II, etc. as appropriate. **Pay grade** / **Geneva Convention Cat.** E-1 to E-4 / I E-5 to E-9 / II W-1 to O-3 / III O-4 to O-6 / IV O-7 to O-10 / V
Date of Issue	Enter the date of signature by the issuing officer.
Signature of Issuing Officer	Enter first name or initial, middle initial, last name, rate/rank, and branch of military service. Signature must be in black or blue ink.

Nested table (Geneva Convention):

Pay grade	Geneva Convention Cat.
E-1 to E-4	I
E-5 to E-9	II
W-1 to O-3	III
O-4 to O-6	IV
O-7 to O-10	V

5.D.5.3 Photograph (for manually prepared ID cards only)

The size of the photo should be approximately 1 inch by 1 inch. The portrait will have the member's full face and consist of the largest image that will include the member's head and information on a title board before a neutral background. The portrait can be black and white or color. The member will be uncovered. An information board is required for members on active duty who are issued a manually prepared ID card. The information board will contain the following information about the member, each on a separate line below each other.

- Last name
- First name and middle initial
- Social security number

5.D.5.4 Lamination

Use only polyester, polyethylene coated plastic film, preferably .010 mil. in thickness and thermoplastic laminating equipment.

5.D.6 Reporting Change in Mailing Address

5.D.6.1 Introduction	A member's mailing address is shown on their LES. This address should be the member's home address and not the unit address. The member's mailing address is used for several purposes, including mailing IRS Form W-2 annually for all personnel.
5.D.6.2 Reference	(a) Direct Access Guide, Changing Mailing Address (Self Service for Members)
5.D.6.3 Members without access to Direct Access	If you do not have access to Direct Access, contact your servicing SPO for instructions.
5.D.6.4 Members with access to Direct Access	Follow the instructions in Reference (a). http://www.uscg.mil/ppc/ps/self_service/members/change_home_or_mailing_address.htm

5.D.7 Employment Verification

5.D.7.1 Introduction

Requests for employment verification from outside the Coast Guard should be completed at the unit if they have the information requested; if not, forward to the SPO. All requestors should be informed that active duty employment verification information is available free of charge on-line at https://www.dmdc.osd.mil/appj/scra/scraHome.do.

5.D.7.2 Reference

(a) The Coast Guard Freedom of Information (FOIA) and Privacy Acts Manual, COMDTINST M5260.3.
(b) Military Personnel Data Records (PDR) System, COMDTINST M1080.10(series),

5.D.7.3 Procedure

All requests for employment verification will be completed as follows:

IF the information is	THEN
Not Privacy Act sensitive,	complete the request.
Privacy Act sensitive,	complete the request, attach a signed statement by the member authorizing release of the information and make the appropriate entry on the Disclosure Log. See reference (b).

5.D.8 E-Resume

5.D.8.1 Introduction

The E-Resume is necessary to provide up-to-date information to personnel assignment officers regarding an active duty or Reserve Component member's personal status and assignment preferences.

5.D.8.2 References

(a) Military Assignments and Authorizations, COMDTINST M1000.8
(b) Direct Access Guide, E-Resume (http://www.uscg.mil/ppc/ps)

5.D.8.3 Submission of the E-Resume

The E-Resume must be submitted by active duty personnel as follows:

- To request a specific duty assignment.
- To request a tour extension at current PDS.
- To request mutual or unilateral transfer.
- 6 to 9 months prior to a member's discharge or RELAD date.
- During the "Engage" phase of the assignment process, for members who will be tour complete in the upcoming assignment year.

The E-Resume must be submitted by reserve personnel as follows:

- To request transfer to a new unit. The E-Resume shall be submitted to CGPSC (rpm-2) via the Reservist's unit.

5.D.9 Assignment/Termination of Government Quarters

5.D.9.1 Introduction

When a member moves into or out of government quarters, it normally results in a change in BAH entitlements. This job aid will assist the housing officer and unit in notifying the SPO to avoid over/under payments.

5.D.9.2 References

(a) CG Housing Manual, COMDTINST M11101.13(series)
Section 6-E, Assignment to Public Quarters and Rental Housing
Section 6-F, Termination of Assignment: Public Quarters and Rental Housing

5.D.9.3 The need for prompt SPO notification

Timely input of pay transactions is critical. This is especially true when a pay transaction has a large dollar impact on the member, such as a transaction connected with government quarters occupancy or termination.

- Providing timely notification (within 24 hours) of a change to a member's housing status will enable the SPO to input the required Direct Access/JUMPS transactions and ensure the member receives the correct amount of pay.
- Expedited SPO notification does not preclude the need for the member to complete a BAH/Housing Worksheet (CG-2025) and forward to the SPO, via the unit. However, in accordance with section 1.2.5 of this manual, the SPO may utilize other sources of information, such as an email from the local housing officer, to initiate pay transactions in advance of receiving the hard-copy worksheet from the member.

5.D.9.4 Advance notification will avoid incorrect payments

Members anticipating assignment to government quarters may submit a special request to the SPO to have the BAH stopped ahead of time to avoid being overpaid.

A member desiring to live on the economy must request permission from their commanding officer to be eligible for BAH entitlements.

5.D.9.5 Notifying the SPO

SPOs, housing offices and unit administrative staffs must work together to develop local procedures for timely SPO notification.

Follow the process, on the next page, upon notification that a member has been assigned or terminated quarters:

Continued on next page

5.D.9 Assignment/Termination of Government Quarters, Continued

5.D.9.5 Notifying the SPO **(continued)**

Step	Action
1	The Housing Office, on the date of assignment, (and not later than 24 hours after date of assignment), notifies the servicing SPO of the assignment via E-mail. • Provide copy of notification to Area Housing Officer. • Provide copy of notification to member's unit (admin/personnel officer). Unit will provide the member with a CG-2025, BAH/Housing Worksheet to complete.
	Ensure notification includes: • Member's name • Member's Rate/Rank • Member's Employee ID Number • Member's Unit • Date of assignment/termination • Exact BAH code description (e.g. With Dep - member assigned CG Leased Quarters) • Indicate if spouse is in service • Indicate type of quarters • If inadequate quarters indicate the rental fee • Address (if this is a notification of assignment to gov't qtrs)
2	Upon receipt of the notification, the SPO will acknowledge receipt of the assignment via return e-mail to the housing office within 24 hours and submit the appropriate Direct Access transaction for correct BAH entitlement and request additional information (normally provided on CG-2025, BAH/Housing Worksheet) from the unit.
3	Member will complete a CG-2025, BAH/Housing Worksheet and forward to the SPO, via the unit.
4	SPO will update member's mailing address in DA upon within 3-working days of receipt of the CG-2025, BAH/Housing Worksheet.

BAH Verification Report

The Housing Office will run the BAH Verification Report contained in the Housing Management Information System (HMIS) every two weeks. The Housing Office will review all discrepancies and correct HMIS data entry errors within 3-5 days of running the BAH Verification Report. Upon completion, the housing office will notify the SPO via e-mail of any remaining discrepancies involving incorrect BAH codes.

5.D.10 Permissive Travel Authorization

5.D.10.1 Introduction

A Permissive travel authorization must be prepared in Basic Coast Guard Memo format. Use of the CG-2519, CG-4251, CG-5131, or authenticated message is not authorized.

5.D.10.2 Reference

(a) Military Assignments and Authorized Absences, COMDTINST M1000.8

5.D.10.3 Preparing a Permissive Travel Authorization

A Permissive travel authorization must contain the following:

- Reason for the travel authorization
- Location and inclusive date the member will be absent
- This non-cost statement from reference (a):

> "This authorization is issued with the understanding that you will not be entitled to reimbursement for mileage or expense in connection therewith. In case you do not desire to bear this expense, consider this authorization cancelled."

- The member's signature acknowledging understanding of the non-cost statement

5.D.10.4 Distribution

The unit must give the original travel authorization to the member. Upon return, the member must endorse the travel authorization with the time/date of departure and return. After return and endorsement by member, the original travel authorization must be forwarded to the SPO to complete personnel transactions to credit/debit subsistence entitlements.

5.D.10.5 Carry LES Copies for House Hunting

Members performing permissive travel for house hunting in the vicinity of their new permanent duty station should consider taking several certified copies of their latest LES.

5.D.11 Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator

5.D.11.1 Introduction

Changes in official Coast Guard records must be made only after an administrative examination has been made of the documentation presented. Name changes must be made in accordance with the member's applicable state law.

5.D.11.2 Reference

(a) Military Personnel Data Records (PDR) System, COMDTINST M1080.10(series)

5.D.11.3 Policy

- Commands have the authority to approve changes to Names, SSN, Date of Birth and Minority Designator.
- PPC will run a weekly query for changes to: Names, SSN, DOB and Minority Designators. This query will be forwarded to CGPSC (psd-mr) for review.

5.D.11.4 Change of name or correction of date of birth

The member will report/request a name change or a request for correction of date of birth to his/her unit. The report or request must be supported by whichever of the following documents is applicable:

- Copy of court order authorizing name change.
- Copy of marriage certificate.
- Copy of final divorce decree containing provisions for restoration of maiden name.
- Naturalization certificate authorizing name change

If the member's request is to correct an earlier entry that is erroneous (such as a mis-numbered SSN or DOB), then the member must provide proof that the earlier entry is incorrect, such as with a birth certificate or social security card.

Upon command authorization the approval will be forwarded to the servicing SPO for Direct Access input.

Continued on next page

5.D.11 Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator, Continued

5.D.11.5 Effective date of name change

Changes in name are effective on the date of command approval.

- If the request is approved, the command will forward a copy of the authorization to the servicing SPO. The SPO will enter changes into Direct Access and make pen & ink changes to the member's PDR and other official documents.

5.D.11.6 Change of SSN

The member will submit a request for a change/correction to an SSN to his/her unit. A Photostat copy of the social security card must accompany the request.

A change of the social security number in the official records will be made only when authorized by the member's command.

- If the request is approved, the command will forward a copy of the authorization to the servicing SPO. The SPO will enter changes into Direct Access and make pen & ink changes to the member's PDR and other official documents.

5.D.11.7 Change to Minority Designator

To change a minority designator, members can input the change in Direct Access (DA) via Self Service (Self Service > Employee > Tasks> **Diversity Update**) or complete an Ethnicity and Race Self-Reporting Worksheet (CG-5200) and forward to the SPO for entry in DA (Administer Workforce > Administer Workforce (GBL) > Use > **Personal Data**).

5.D.12 TRICARE Selected Reserve Dental Program

5.D.12.1 Introduction

The TRICARE Selected Reserve Dental Program (TSRDP) is an optional government sponsored insurance plan for eligible reserve members. Family members are not eligible. Enrollment in the plan is not automatic, but requires positive enrollment between the reserve member and the contractor.

This program will be administered by the TRICARE Support Office with dental care provided through a civilian contractor, Humana Military Health Care Services, INC

Selected Reserve members who wish to enroll may call the contractor at 1-800-211-3614.

5.D.12.2 TSRDP Premiums

There is only one premium rate and it is for selected reserve members only.

5.D.12.3 Enrollment Requirements

Enrollment into TSRDP is voluntary and is subject to the reserve member being enrolled in DEERS. The reserve must remain enrolled into TSRDP for a minimum of twelve months or be subject to a lockout period of twelve months. The only exception to the twelve-month requirement is if the selected reserve member is called to active duty for greater than 30 days. The twelve-month minimum will not start over for members called to active duty.

Note: The contractor will handle all enrollments (no action is necessary by the SPO). The contractor will collect 4 months of premiums at the time of enrollment. The advance premiums provide a cushion to be used during the period of enrollment due to the lag time involved with collecting enrollee premiums.

5.D.12.4 Disenrollment requirement

The reserve member may disenroll from TSRDP only after being enrolled for a period of twelve months. After the initial twelve month lock-in period or if enrollee is called to active duty, any unused premiums will be returned to the enrollee upon disenrollment.

Note: Disenrollments are between the reserve member and the contractor.

Continued on next page

5.D.12 TRICARE Selected Reserve Dental Program, Continued

5.D.12.5 Collection of premiums

The following rules apply:

- The monthly deduction for TSRDP will be withheld from the reserve member's pay if the reserve member receives pay during the month.
- If the reserve member did not receive sufficient pay during the month, the contractor will collect the premium directly from the reserve member.

Note: Failure to make monthly renewal premium payments after being billed by the contractor for months when the reserve member did not receive pay will result in the reservists being disenrolled from the TSRDP and subject to a lock-out period of twelve months.

5.D.12.6 Termination of TSRDP

TSRDP is terminated on the last day of the month in which the SELRES member is discharged, transferred to the Individual Ready Reserve (IRR), Standby Reserve, Retired Reserve, or SELRES ordered to active duty for a period of more than 30 days.

5.D.12.7 Effective date of coverage

Coverage usually begins on the first day of the following month of initial enrollment.

5.D.13 Issuance of Official Passport and Visas

5.D.13.1 Introduction

This section provides references for issuance or termination of official passports and visas. International Affairs, Commandant (CG-DCO-I) will obtain “NO-FEE” OFFICIAL and DIPLOMATIC PASSPORTS for civilian and military members of the United States Coast Guard, as well as military dependents, performing foreign travel on OFFICIAL GOVERNMENT BUSINESS. Visas are obtained as per the requirements of the specific county and the Department of Defense Foreign Clearance Guide.

5.D.13.2 Reference

The following directives provide information about foreign travel, official passports and visas.

(a) Passports and Visas, COMDTINST 4650.10 (series)
(b) Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
(c) Foreign Travel, Passports and VISAS, COMDTINST 5000.5 (series)

5.D.13.3 Policy

See reference (a), paragraph 5, for the policy on issuance of official passports.

5.D.13.4 Passport / Visa issuance procedure

See reference (a), paragraph 7, and the applicable checklist (No-Fee Official Passport Application Checklist, reference (a), enclosure (1) or Official Visa Application Checklist, reference (a), enclosure (2)) for passport and visa application procedures. Updated information, forms, detailed instructions, and illustrative examples are maintained on the *CGPortal*: https://collab.uscg.mil/lotus/myquickr/foreign-travel/official-and-diplomatic-passports.

Official Passport Acceptance Agents (OPAAs) are available at servicing PSSUs and certain units to assist with and verify passport applications.

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